



# **Oracle® Business Intelligence Presentation Services Administration Guide**

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# Contents

## Chapter 1: What's New in This Release

## Chapter 2: Administering Oracle BI Presentation Services

Making Oracle BI Presentation Services Configuration Changes	15
Changing the Oracle BI Presentation Services ODBC DSN	17
Setting the Oracle BI Presentation Services Configuration File Path	17
Disabling the Oracle BI Presentation Services Feature to Remember Users' Names and Passwords	18
Setting the Time to Expire for Idle Oracle BI Presentation Services Client Connections	18
Administering Sessions in Oracle BI Presentation Services	19
Setting the Time to Expire for Oracle BI Presentation Services Client Sessions	22
Setting the Time to Keep an Unsaved Oracle Business Intelligence Request	22
Setting the Time to Cancel an Unattended Oracle Business Intelligence Request	23
Setting the Time to Log Users Off Oracle BI Presentation Services Automatically	23
Setting the Preferred Time Zone for Users	24
Where Time Zones Are Used	25
Setting Time Zones	25
Precedence Order for Time Zones	26
Where Time Zone Specifications Are Stored	27
Description of Time Zone Settings	28
Example: Configuration File Settings for Specifying the Time Zone	29
Managing the Oracle BI Presentation Services Cache Settings	29
Configuring the Oracle BI Presentation Services Cookie Domain	31
Managing Oracle BI Presentation Services URL Generation and Resource File Location	32
Specifying the Default Language for the Oracle BI Presentation Services Login Screen	35
Specifying Whether to Allow HTML Input in Oracle BI Presentation Services Fields	37
Using the Javahost Service in Oracle BI Presentation Services	37

Starting and Stopping the Javahost Service	38
Javahost Service Command Line Options	38
Javahost Service Command Line Properties	41
Configuring the Javahost Service	41
Javahost Service Logging	46

Configuration Keys	46
--------------------	----

## **Chapter 3: Administering Oracle BI Answers**

Managing Settings for the Oracle BI Presentation Services Chart Image Server	49
Managing the Oracle BI Presentation Services Charting Settings	51
Configuring Answers Pivot Table Settings	52
Configuring the Maximum Number of Rows in an Answers Table View	53
Adding Support for Navigation and Drill Down in Answers	54
Changing the Default Currency in Answers	54
Nesting Folders in the Selection Pane in Answers	55
Blocking Requests in Answers	56
Blocking Requests Based on Criteria	56
Blocking Requests Based on Formula	57
Validation Helper Functions	59
Specifying View Defaults for Answers and Dashboards Users	60
XML Message Files for View Defaults	60
Examples of Customizing Answers and Dashboards Default Values	60
Changing Alternating Bar Color	65

## **Chapter 4: Administering Oracle BI Delivers**

About Delivers iBots and Impersonation	67
About Delivers iBots and AntiVirus Software	68
Viewing Entries in the Delivers iBot Log Directory	68
Disabling Delivers	69
Specifying the Machine Running Oracle BI Scheduler	70
Changing the Directory in Which Delivers iBot Deliveries Are Stored	70
Integrating Delivers with Oracle's Siebel Workflow	71
Using Delivers to Seed the Oracle BI Server Cache	71
About Permission Settings for Delivers and iBots	71
Managing Device Types for Delivers	72

About the SA System Subject Area and Scheduling iBot Deliveries	73
Setting the Case of Logon Names for the SA System Subject Area	74
Controlling Delivery Options for iBots	74
Viewing Information About Active Delivers iBot Sessions	76

## **Chapter 5: Administering Oracle BI Dashboards**

About Managing Dashboards	77
Managing Dashboards	78
Creating Dashboards Action Links	79
Setting the Number of Dashboards Names to Appear on a Screen	81
Controlling Access to Saved Selection Options in Dashboards	82
Overview of Saved Selections in Dashboards	82
Administering Saved Selections	82
Table of Permission and Privilege Settings for Creating Saved Selections	85
Example Usage Scenario for Saved Selection Administration	86
Setting the Number of Oracle Business Intelligence Briefing Book Links to Follow	87
Downloading Oracle Business Intelligence Results in Non-UNICODE Format	87
Integrating Answers into Other Portals or Intranets	88
Configuring Report Write Back	90
Write Back Configuration Tasks	90
How Write Back Works	91
Creating a Write Back Template	92
Example: Write Back Template	93
Write Back Limitations	93

## **Chapter 6: Administering the Oracle BI Presentation Catalog**

About the Presentation Catalog	95
Changing the Name and Location of the Presentation Catalog	96
Configuring the Presentation Catalog for More Than 4000 Users	97
Managing the Presentation Catalog Cache in Environments Running Multiple Instances of Oracle BI Presentation Services	97
Creating a New Presentation Catalog	97
Moving a Presentation Catalog to Another Installation	98
Committing an Object to Production	98

Replicating Presentation Catalogs	99
About Replication Log Files	99
Setup for Presentation Catalog Replication	101
Resuming Replication If Replication Log Files Are Unavailable	102
Using the Oracle BI Presentation Services Replication Agent	103
Creating the config.xml File for Replication	105
Editing the instanceconfig.xml File for Replication	108
Archiving a Presentation Catalog	109
Administering Items in the Presentation Catalog	110

## **Chapter 7: Managing Presentation Catalogs Using Oracle BI Catalog Manager**

About Catalog Manager	115
Guidelines for Working with Catalog Manager	116
Starting Catalog Manager	116
Opening Presentation Catalogs in Catalog Manager	116
About the Catalog Manager Workspace	119
Managing the View of the Catalog Manager Workspace	120
Searching for Presentation Catalog Items Using Catalog Manager	121
Copying and Pasting Items Between Presentation Catalogs	122
Renaming Presentation Catalog Items	123
Working with the Properties of Presentation Catalog Items	123
Setting Permissions of Presentation Catalog Items	124
Viewing and Editing Presentation Catalog Objects in XML	125
Setting Browser Preference in Catalog Manager	126
Previewing Objects from Catalog Manager	126
Searching for and Replacing Presentation Catalog Text Using Catalog Manager	127
Searching for and Replacing a Single Presentation Catalog Text String	127
About Searching for and Replacing Multiple Presentation Catalog Text Strings	127
Searching for and Replacing Multiple Presentation Catalog Text Strings	128
Creating Reports to Display Presentation Catalog Data Using Catalog Manager	129
Localizing Presentation Catalog Captions	130
About Upgrading the Presentation Catalog to a Newer Version	132
Archiving and Unarchiving a Presentation Catalog Using Catalog Manager	132

## Chapter 8: Managing Oracle BI Presentation Services Security

Overview of Oracle BI Presentation Services Security	135
Types of Presentation Services Groups	138
Administering Presentation Services Groups	139
About Oracle BI Presentation Services User Authentication	142
About Presentation Services Groups and Session Variables	143
Inheritance of Oracle BI Presentation Services Permissions and Privileges	145
About Setting Oracle BI Presentation Services Permissions	147
Overview of the Oracle BI Presentation Services Administration Screen	148
Setting Permissions in Oracle BI Presentation Services Administration	150
About Setting Oracle BI Presentation Services Privileges	152
Setting Privileges in Oracle BI Presentation Services Administration	152
Default Oracle BI Presentation Services Privilege Assignments	154
Guidelines for Configuring Oracle BI Presentation Services Security for the Presentation Catalog and Dashboards	161
Creating Presentation Services Groups	162
Setting Up the Presentation Catalog Structure	162
Setting Permissions to Presentation Catalog Items	164
Creating Shared Dashboards	164
Adding Shared Dashboards Pages and Content	165
Creating and Using Shared Items	166
Testing the Dashboards	166
Setting Up a Virtual Directory for Shared Oracle Business Intelligence Documents	167
Releasing Dashboards to the User Community	167
About Authorizing Users to Act for Others	167
Process of Authorizing Users to Act for Others	168
Defining the Association Between Proxy Users and Target Users	168
Creating Session Variables for Proxy Functionality	169
Modifying the instanceconfig.xml File for Proxy Functionality	170
Creating a Custom Message Template for Proxy Functionality	170
Assigning the Proxy Privilege	173
Enabling User-Initiated Administration Actions	173

## Chapter 9: Using Oracle BI Presentation Services Logging

Using the Oracle BI Presentation Services Logging Facility	175
--	-----

Oracle BI Presentation Services Configuration File Structure	176
Examples of the Formats of Logged Messages	181
Oracle BI Presentation Services Message Structure	183
Oracle BI Presentation Services Logging Levels	185
Oracle BI Presentation Services Log Filters	186

## **Chapter 10: Customizing the Oracle BI Presentation Services User Interface**

About Skins and Styles	187
Using the SKIN Variable	188
Using Skins and Styles	188
Modifying Oracle BI Presentation Services User Interface Styles	188
Specifying Defaults for Oracle BI Presentation Services Styles and Skins	191
Customizing Oracle BI Presentation Services NonDashboard Components	191
Customizing the Oracle BI Presentation Services User Interface Using XML Message Files	192
Adding a Language Selection to Oracle BI Presentation Services Screens	197
Frequently Customized Oracle BI Presentation Services User Interface Messages	198
Customizing the Appearance of the Oracle BI Presentation Services Login Screens	199
Configuring the Oracle Business Intelligence ReportUI Portlet	199
Installing and Configuring the Oracle BI ReportUI Portlet	200
Editing the portlet.xml file to configure Oracle BI ReportUI Portlet	200
Deploying the Oracle BI ReportUI Portlet	203
Configuring Authentication in the Oracle BI ReportUI Portlet	203

## **Chapter 11: Integrating Oracle BI Presentation Services into Corporate Environments Using HTTP**

Incorporating Oracle Business Intelligence Results into External Portals or Applications Using the Go URL	207
Referencing Dashboard Content in External Portals or Applications Using the Oracle BI Presentation Services Dashboard URL	210
Using the Oracle BI Presentation Services Go URL to Issue SQL and Pass Filters	212
Issuing SQL Using the Oracle BI Presentation Services Go URL	212
Passing Filters to the Oracle BI Presentation Services Go URL Through a URL (Navigation)	212



Example of an Oracle Business Intelligence Third-Party SQL Tool Integration 217

## **Index**



# 1

## What's New in This Release

Oracle Business Intelligence Enterprise Edition consists of components that were formerly available from Siebel Systems as Siebel Business Analytics Platform, with a number of significant enhancements.

The Oracle Business Intelligence Presentation Services Administration Guide is part of the documentation set for Oracle Business Intelligence Enterprise Edition. This guide contains information about administering Oracle BI Presentation Services, including tasks that are performed using the Oracle Business Intelligence Presentation Services Administration screen and Oracle Business Intelligence Catalog Manager. This guide contains new material and material that was previously published under the title *Siebel Analytics Web Administration Guide*.

Oracle recommends reading the Oracle Business Intelligence Enterprise Edition Release Notes before installing, using, or upgrading the Oracle BI Infrastructure. The Oracle Business Intelligence Enterprise Edition Release Notes are available:

- On the Oracle Business Intelligence Enterprise Edition CD-ROM.
- On the Oracle Technology Network at [http://www.oracle.com/technology/documentation/bi\\_ee.html](http://www.oracle.com/technology/documentation/bi_ee.html) (to register for a free account on the Oracle Technology Network, go to <http://www.oracle.com/technology/about/index.html>).

### What's New in Oracle Business Intelligence Presentation Services Administration Guide, Version 10.1.3.2

Table 1 lists changes described in this version of the documentation to support Release 10.1.3.2 of the software.

Table 1. New Product Features in Oracle Business Intelligence Presentation Services Administration Guide, Version 10.1.3.2

Topic/Topics	Description
<a href="#">"Setting the Preferred Time Zone for Users" on page 24</a>	Added new topic for setting the preferred time zone for users.
<a href="#">"Specifying Whether to Allow HTML Input in Oracle BI Presentation Services Fields" on page 37</a>	Added new topic on specifying whether to allow HTML input in fields.
<a href="#">"Using the Javahost Service in Oracle BI Presentation Services" on page 37</a>	Revised the topics for Javahost service.
<a href="#">"Configuring the Maximum Number of Rows in an Answers Table View" on page 53</a>	Revised information on ResultRowLimit entry.

Table 1. New Product Features in Oracle Business Intelligence Presentation Services Administration Guide, Version 10.1.3.2

Topic/Topics	Description
<a href="#">"Managing Device Types for Delivers" on page 72</a>	Added new topic on managing device types for Oracle Business Intelligence Delivers.
<a href="#">"Setting the Case of Logon Names for the SA System Subject Areal" on page 74</a>	Added new topic describing the UpperCaseRecipientNames element.
<a href="#">"Controlling Delivery Options for iBots" on page 74</a>	Added new topic on controlling delivery options for iBots.
<a href="#">"Configuring Report Write Back" on page 90</a>	Revised to provide more complete information on performing write back.
Presentation Catalog topics	Revised the topics in <a href="#">Chapter 6, "Administering the Oracle BI Presentation Catalog"</a> to describe the enhanced Presentation Catalog.
<a href="#">"Replicating Presentation Catalogs" on page 99</a>	Revised the topics for replication in this section.
<a href="#">"Archiving a Presentation Catalog" on page 109</a>	Added new topic on archiving a Presentation Catalog using Oracle BI Presentation Services Administration.
Oracle Business Intelligence Catalog Manager topics  Note that Oracle Business Intelligence Catalog Manager was formerly known as Siebel Analytics Catalog Manager.	Revised Catalog Manager topics and moved them into their own chapter and added new topics to describe the enhanced Catalog Manager functionality. The new chapter is titled <a href="#">Chapter 7, "Managing Presentation Catalogs Using Oracle BI Catalog Manager."</a>
<a href="#">"Archiving and Unarchiving a Presentation Catalog Using Catalog Manager" on page 132</a>	Added new topic on archiving and unarchiving the Oracle Business Intelligence Presentation Catalog using Oracle Business Intelligence Catalog Manager
<a href="#">"Types of Presentation Services Groups" on page 138</a>	Removed the Authenticated Users group from this topic.
<a href="#">"Administering Presentation Services Groups" on page 139</a>	Updated the procedures for administering Presentation Services groups.
<a href="#">"Overview of the Oracle BI Presentation Services Administration Screen" on page 148</a>	Updated the table describing the links in the Activities Section in Oracle BI Presentation Services Administration, including adding the Manage Device Types, Manage BI Publisher, and Toggle Maintenance Mode links. Added Available Paging Memory and Available Virtual Address Space to the Product Information section.
<a href="#">"Setting Permissions in Oracle BI Presentation Services Administration" on page 150</a>	Updated the procedures for setting permissions.

Table 1. New Product Features in Oracle Business Intelligence Presentation Services Administration Guide, Version 10.1.3.2

Topic/Topics	Description
<a href="#">“Setting Privileges in Oracle BI Presentation Services Administration” on page 152</a>	Updated the procedures for setting privileges.
<a href="#">“Default Oracle BI Presentation Services Privilege Assignments” on page 154</a>	Updated the table listing the privileges and default settings for the Oracle Business Intelligence Infrastructure.
<a href="#">“Creating and Using Shared Items” on page 166</a>	Added new topic to describe creating and using shared items.
Topics for the proxy functionality	Added new topics on the ability to authorize users to act as other in <a href="#">Chapter 8, “Managing Oracle BI Presentation Services Security.”</a>
<a href="#">“Oracle BI Presentation Services Configuration File Structure” on page 176</a>	Added information on the fmtName attribute for the Writer element.
<a href="#">“Adding a Language Selection to Oracle BI Presentation Services Screens” on page 197</a>	Added new topic to describe how to add a language selection to Oracle BI Presentation Services screens.
<a href="#">“Configuring the Oracle Business Intelligence ReportUI Portlet” on page 199</a>	Revised the topics for configuring the Oracle BI ReportUI Portlet.



# 2

## Administering Oracle BI Presentation Services

This chapter provides general post-installation configuration and administration procedures that are *not* specific to Oracle Business Intelligence Answers, Oracle Business Intelligence Delivers, Oracle Business Intelligence Interactive Dashboard, or Oracle Business Intelligence Presentation Catalog. Directions for configuring these components of Oracle BI Presentation Services are in subsequent chapters.

This chapter contains the following sections:

- [Making Oracle BI Presentation Services Configuration Changes on page 15](#)
- [Changing the Oracle BI Presentation Services ODBC DSN on page 17](#)
- [Setting the Oracle BI Presentation Services Configuration File Path on page 17](#)
- [Disabling the Oracle BI Presentation Services Feature to Remember Users' Names and Passwords on page 18](#)
- [Setting the Time to Expire for Idle Oracle BI Presentation Services Client Connections on page 18](#)
- [Administering Sessions in Oracle BI Presentation Services on page 19](#)
- [Setting the Time to Expire for Oracle BI Presentation Services Client Sessions on page 22](#)
- [Setting the Time to Keep an Unsaved Oracle Business Intelligence Request on page 22](#)
- [Setting the Time to Cancel an Unattended Oracle Business Intelligence Request on page 23](#)
- [Setting the Time to Log Users Off Oracle BI Presentation Services Automatically on page 23](#)
- [Setting the Preferred Time Zone for Users on page 24](#)
- [Managing the Oracle BI Presentation Services Cache Settings on page 29](#)
- [Configuring the Oracle BI Presentation Services Cookie Domain on page 31](#)
- [Managing Oracle BI Presentation Services URL Generation and Resource File Location on page 32](#)
- [Specifying the Default Language for the Oracle BI Presentation Services Login Screen on page 35](#)
- [Specifying Whether to Allow HTML Input in Oracle BI Presentation Services Fields on page 37](#)
- [Using the Javahost Service in Oracle BI Presentation Services on page 37](#)
- [Configuration Keys on page 46](#)

## Making Oracle BI Presentation Services Configuration Changes

This section provides procedures for making configuration changes. You need to make changes only if you want to change default elements, such as the name of the Presentation Catalog, or override internal default settings, such as the time for client connections to expire.

You make configuration changes by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml), which holds configuration settings for Oracle BI Presentation Services.

For organizations that use Oracle Application Server, Oracle recommends that you use Oracle Application Server Control to modify configuration files. For organizations that use other application servers, Oracle recommends that you use JConsole. For more information, see the *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*.

**NOTE:** If you have previously made configuration changes by modifying the Windows registry, you should migrate those changes to the Oracle BI Presentation Services configuration file (instanceconfig.xml). In the Windows registry, entries under the Common key remain valid.

For general background information about customizing the Oracle BI Presentation Services XML files, read [“Customizing the Oracle BI Presentation Services User Interface Using XML Message Files”](#) on page 192.

### To make changes to the configuration file instanceconfig.xml

- 1 Navigate to:  
SADATADI R\web\confi g  
where SADATADIR is the data directory.  
**CAUTION:** Always make a backup copy of the instanceconfig.xml file before you make any changes.
- 2 Locate the instanceconfig.xml file and make a backup copy.
- 3 Use a text editor to open the instanceconfig.xml file.
- 4 Place your entries between the elements <ServerInstance> and </ServerInstance>, using the values described throughout this chapter.
- 5 Save the file when you are done.  
Your changes take effect when the service for Oracle BI Presentation Services is restarted.

### Example instanceconfig.xml File

The following XML file is an example of the Oracle BI Presentation Services configuration file (instanceconfig.xml):

```
<?xml version="1.0" ?>
<!-- Oracle BI Presentation Services Configuration File -->
<!-- The following example shows initialization settings for a server instance. -->

<WebConfig>
  <ServerInstance>
    <CatalogPath>/OracleBI Data/web/catalog/default</CatalogPath>
    <DSN>AnalyticWeb</DSN>
  </ServerInstance>
</WebConfig>
```



Several entries are present in the file `instanceconfig.xml` by default, including the path to the Presentation Catalog, and the name of the Oracle Business Intelligence Server data source name used by Oracle BI Presentation Services to access Oracle BI Server.

For example, the path to the Presentation Catalog is shown between the `<CatalogPath>` and `</CatalogPath>` elements:

- In Windows, an example path might be the following:

```
<CatalogPath>c:\OracleBI Data\web\catalog\default</CatalogPath>
```

- In UNIX, an example path might be the following:

```
<CatalogPath>/usr/local/OracleBI Data/web/catalog/default</CatalogPath>
```

## Changing the Oracle BI Presentation Services ODBC DSN

Oracle BI Presentation Services accesses an Oracle BI Server repository with a single Oracle BI Server data source name (DSN). The installation process configures a DSN named Analytics Web for this purpose. For information on configuring a new or existing DSN, read *Oracle Business Intelligence Server Administration Guide*.

Answers must use a single DSN.

If you change the name of the DSN, you need to update the Oracle BI Presentation Services configuration file (`instanceconfig.xml`) to use the new name.

The following entry is an example:

```
<DSN>Oracle BI Presentation Services Product</DSN>
```

For information about working in the Oracle BI Presentation Services configuration file (`instanceconfig.xml`), read ["Making Oracle BI Presentation Services Configuration Changes" on page 15](#).

## Setting the Oracle BI Presentation Services Configuration File Path

You can override the path that Oracle BI Presentation Services searches for configuration files upon startup. The internal default location is `$(SADATADIR)\web\config`.

Oracle BI Presentation Services must have read permission to this path. The default data directory is `OracleBIData`.

You can override the internal default by adding the following entry to the Oracle BI Presentation Services configuration file (`instanceconfig.xml`), using a fully qualified path for the *value*:

```
<ConfigDir>value</ConfigDir>
```

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

## Disabling the Oracle BI Presentation Services Feature to Remember Users' Names and Passwords

By default, users are asked if they want to have their user names and passwords remembered when logging on to Oracle BI Presentation Services. You can disable this behavior by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the following entry. When the value is set to No, users always have to type their user names and passwords.

The following entry is an example:

```
<AllowRememberPassword>No</AllowRememberPassword>
```

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

## Setting the Time to Expire for Idle Oracle BI Presentation Services Client Connections

The entry ConnectionExpireMinutes defines the length of idle time that the connection between Oracle BI Presentation Services and the Oracle BI Server is maintained before the connection is closed. You can override the number of minutes to elapse by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the following entry. The internal default is 3 minutes.

The following entry is an example:

```
<ConnectionExpireMinutes>3</ConnectionExpireMinutes>
```

When a user logs into the Analytics application, a connection is created from the browser client to Oracle BI Presentation Services, and another connection is created from Oracle BI Presentation Services to the Oracle BI Server. If the user's session remains idle for three minutes or more (the user does not perform any operation), the connection from Oracle BI Presentation Services to the Oracle BI Server is closed or dropped. The connection from the browser to Oracle BI Presentation Services still remains intact. The next time the user performs an operation such as running a report or navigating to a dashboard, a new connection is created from Oracle BI Presentation Services to the Oracle BI Server.

**NOTE:** This setting affects idle time only. For example, if the user were to run a request that executes for more than three minutes, the original connection from Oracle BI Presentation Services to the Oracle BI Server remains intact throughout, until the three-minute idle time is encountered again. This setting therefore keeps down the number of open connections to the server.

You can also set the amount of time to elapse before a user is logged off automatically. For more information, read [“Setting the Time to Log Users Off Oracle BI Presentation Services Automatically”](#) on page 23.

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes”](#) on page 15.

## Administering Sessions in Oracle BI Presentation Services

Using the Session Management screen in Oracle BI Presentation Services Administration, you can view information about logged on users and running requests, cancel requests, and clear the cache.

### *To access the Session Management screen*

- 1 Log in to Oracle BI Presentation Services.
- 2 Choose Settings > Administration.
- 3 Click the Manage Sessions link.

The Session Management screen appears, displaying the following tables:

- The Sessions table, which gives information about users who are logged on to Oracle BI Presentation Services:

Field	Description
User ID	The name of the user connected to Oracle BI Presentation Services.
Host Address	The name or IP address of the machine that initiated the HTTP connection to the Web server. This could be a user's PC, a handheld device, a firewall, and so on.
Session ID	A unique identifier assigned by Oracle BI Presentation Services for each client session.

Field	Description
Browser Info	Information about the browser being used to access Oracle BI Presentation Services.
Logged On	The time stamp when the user ID logged on to Oracle BI Presentation Services.
Last Access	The time stamp of the user ID's last activity on Oracle BI Presentation Services. This can be any kind of activity on the system, such as switching from one dashboard page to another.

- The Cursor Cache table, which shows the status of requests made by users:

Field	Description
ID	The unique internal cache identifier for this entry.
User	The name of the user who ran the request and last placed it into the cache. If two IDs are shown, the second ID is impersonating the first. For example, the entry lhurley/administrator means that the Administrator account logged on and impersonated lhurley. This can happen when the Oracle Business Intelligence Scheduler starts an iBot on someone's behalf. Oracle BI Scheduler logs on and impersonates that user so security and content filters still apply.
Refs	The number of references to this entry since it was placed into the cache.
Status	The status of the request using this cache entry: <ul style="list-style-type: none"> <li>■ <b>Running.</b> The request is currently running.</li> <li>■ <b>Finished.</b> The request has finished.</li> <li>■ <b>Queued.</b> The system is waiting for a thread to become available so the request can be processed.</li> <li>■ <b>Canceling.</b> The application is in the process of canceling the request.</li> <li>■ <b>Error.</b> An error was encountered during the processing or running of the request. Look in the Statement column for information about the error.</li> </ul>
Time	The time taken to process and run the request, displayed in one second increments. A value of 0s (zero seconds) indicates that the request took under 1 second to complete.

Field	Description
Action	<ul style="list-style-type: none"> <li>■ <b>Cancel.</b> Kills the request. Appears for in-progress requests. The user running the request will receive an informational message indicating that the request was canceled by an administrator.</li> <li>■ <b>Close.</b> Clears the cache entry associated with this request. Appears for completed requests.</li> <li>■ <b>View Log.</b> Displays the entry in the nQQuery.log file for this request (if logging is turned on for this user). This file logs query activity on the system at the individual user level.</li> </ul> <p>Query logging is, by default, turned off. It can be enabled for individual users at different logging levels. The Oracle BI Server Administrator uses Security manager to enable logging for a user.</p> <p>You can also view the nQQuery.log file (located by default in the Log directory in the Oracle Business Intelligence installation directory) using a text editor such as Windows Notepad. The Oracle BI Server Administrator determines the maximum size of the nQQuery.log file by setting the USER_LOG_FILE_SIZE parameter in the NQSCfg.ini file.</p>
Last Accessed	The time stamp of the last time the cache entry for this request was used to satisfy a request.
Statement	The SQL issued for the request, or if the request resulted in an error, information about the nature of the error.
Information	Usage tracking information (for example, what report contained the query).
Records	The number of records in the result set that have been seen (for example, 50+ to indicate that 50 records have been seen but there are additional records to be fetched or 75 to indicate that 75 records have been seen and there are no more records to be fetched)

### *To cancel all running requests*

- 1 Click the Cancel Running Requests button.
- 2 Click Finished.

### *To cancel one running request*

- In the Cursor Cache table, identify the request and click the Cancel link in the Action column.
- The user receives a message indicating that the request was canceled by an administrator.

### *To clear the Web cache*

- 1 In the Cursor Cache table, identify the request and click the Close All Cursors button.
- 2 Click Finished.

### *To clear the cache entry associated with a request*

- In the Cursor Cache table, identify the request and click the Close link in the Action column.

### *To view the query file for information about a request*

- In the Cursor Cache table, identify the request and click the View Log link.

**NOTE:** Query logging must be turned on for data to be saved in this log file. For more information about query logging, read *Oracle Business Intelligence Server Administration Guide*.

## Setting the Time to Expire for Oracle BI Presentation Services Client Sessions

The entry `ClientSessionExpireMinutes` defines the length of idle time that can elapse before Oracle BI Presentation Services removes the user's client (browser) session information from its memory. This session includes user-specific state information such as request cache, dashboard page state, subject area information, connection information, and so on.

The internal default is 1440 (24 hours).

For example, if the user does not access Oracle BI Presentation Services in 24 hours or more, the server's information about that session is removed completely, in which case the user will be logged out of the application and will need to log back in. All state information is lost.

You can override the number of minutes to elapse before browser client sessions are removed by modifying the Oracle BI Presentation Services configuration file (`instanceconfig.xml`) to add the following entry. The value must be greater than or equal to the value specified for the setting `SearchIDExpireMinutes`, described in [“Setting the Time to Keep an Unsaved Oracle Business Intelligence Request” on page 22](#).

The following entry is an example:

```
<ClientSessionExpireMinutes>1440</ClientSessionExpireMinutes>
```

For information about working in the Oracle BI Presentation Services configuration file (`instanceconfig.xml`), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

## Setting the Time to Keep an Unsaved Oracle Business Intelligence Request

You can override the time, in minutes, that an unsaved request remains valid by modifying the Oracle BI Presentation Services configuration file (`instanceconfig.xml`) to add the following entry. This entry applies to unsaved requests only. The internal default is 180 (three hours).

**NOTE:** The value must be less than or equal to the value specified for the setting `ClientSessionExpireMinutes`, described in [“Setting the Time to Expire for Oracle BI Presentation Services Client Sessions” on page 22](#).

The following entry is an example:

```
<SearchIDExpireMinutes>1440</SearchIDExpireMinutes>
```

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

## Setting the Time to Cancel an Unattended Oracle Business Intelligence Request

You can override the time to elapse, in minutes, before an unattended request is cancelled by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the following entry. An unattended request is one that has not been accessed in the number of minutes specified by this setting. The internal default is 5. The minimum value is 2.

This entry handles the case where a user is at the Request screen in Answers and browses elsewhere, abandoning the request, at least temporarily. Do not set the value too small, however, as the user may return to the request.

The following entry is an example:

```
<UnaccessedRunningTimeoutMinutes>5</UnaccessedRunningTimeoutMinutes>
```

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

## Setting the Time to Log Users Off Oracle BI Presentation Services Automatically

You can override the time to elapse, in minutes, before a user is automatically logged off. This setting applies only to users who do not have the following option selected at the Log In screen:

Remember my ID and password

If this value expires before the value set in the entry ConnectionExpireMinutes, the user can log back in to the existing session. For information about the ConnectionExpireMinutes entry, read [“Setting the Time to Expire for Idle Oracle BI Presentation Services Client Connections” on page 18](#).

The default is 180 (three hours). You can change the number of minutes by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml).

The following entry is an example:

```
<LogonExpireMinutes>180</LogonExpireMinutes>
```

**NOTE:** You can disable this setting by setting it to a value greater than the value for the setting `ClientSessionExpireMinutes`, described in [“Setting the Time to Expire for Oracle BI Presentation Services Client Sessions” on page 22](#).

For information about working in the Oracle BI Presentation Services configuration file (`instanceconfig.xml`), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

## Setting the Preferred Time Zone for Users

If you have users in time zones that are different from the zone for Oracle BI Presentation Services, then you can specify the time stamps that those users see in Oracle Business Intelligence. For example, suppose the server is located in the Pacific time zone in the United States. You can specify that users on the east coast of the United States see time stamps displayed in Eastern Standard Time.

If you make no time zone settings and if a user does not specify a preferred time zone using the My Account screen in Answers, then that user sees time displayed according to the local time zone for Oracle BI Presentation Services.

For information on how users specify their preferred time zones, see the *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.

This section contains the following topics on preferred time zones:

- [Where Time Zones Are Used on page 25](#)
- [Setting Time Zones on page 25](#)
- [Precedence Order for Time Zones](#)
- [Where Time Zone Specifications Are Stored on page 27](#)
- [Description of Time Zone Settings on page 28](#)
- [Example: Configuration File Settings for Specifying the Time Zone on page 29](#)



## Where Time Zones Are Used

Before you begin to set preferred time zones, see [Table 2](#) for information on where time zones are used.

Table 2. Time Zone Usage

Type	Description
Oracle BI Presentation Services	As the Presentation Services Administrator, you can specify the time zone that Oracle BI Presentation Services uses.
Data from the database	<p>The Oracle BI Server Administrator specifies the time zone for the data that is retrieved from the database.</p> <p>If you make no time zone settings, then users see the time stamp data in the time zone of the original data as set by the Oracle BI Server Administrator.</p>
Content that is displayed in Oracle Business Intelligence	<p>Users who create reports can specify the time zone that is displayed in their reports and dashboard prompts. This specification overrides those made by you as the administrator and by end users if they have previously used the column in their queries and have set the time zone.</p> <p>If the specified display time zone supports daylight saving time, then the timestamp values that are displayed are automatically adjusted for daylight saving time.</p>
General time stamps that indicate when events happen	<p>End users can specify the time zone for many general stamps including the following ones:</p> <ul style="list-style-type: none"> <li>■ The scheduled time of iBots.</li> <li>■ The generated time of alerts or reports.</li> <li>■ The time on which items in the Presentation Catalog are created, modified, and accessed.</li> </ul>
Log files	Log files contain time stamps for various activities.

## Setting Time Zones

Use the following procedure to set time zones for users.

### *To set preferred time zones for users*

- 1 Determine the time zone that is set for Oracle BI Presentation Services.
- 2 Use elements in the Oracle BI Presentation Services configuration file (instanceconfig.xml) or session variables. Consult the following for more information:
  - See [Table 3](#) for information on the precedence order for time zones.

- See [Table 4](#) for descriptions of the session variables and elements.
  - See [“Example: Configuration File Settings for Specifying the Time Zone”](#) on page 29.
  - See the *Oracle Business Intelligence Server Administration Guide* for complete information on session variables.
- 3 Encourage end users to specify their preferred time zones using the My Account screen in Answers.
  - 4 Encourage users who create reports to do the following to set the time stamps for their reports:
    - a Use the Data Format tab of the Column Properties dialog to specify the time zone that is displayed in the columns of their reports.
    - b Use the Time Zone dialog to set the time zone that is displayed in dashboard prompts.

## Precedence Order for Time Zones

The actual time zone in which various types of content are displayed follows a precedence order that is described in [Table 3](#). In the table, the items with lower numbers override those with higher numbers. For example, Item 1 takes precedence over Item 2.

Table 3. Precedence Order for Time Zones

Time Zone For	Determined By
Data	<ol style="list-style-type: none"> <li>1 The setting of the DATA_TZ session variable.</li> <li>2 The setting of the &lt;DefaultDataOffset&gt; element in the instanceconfig.xml file.</li> <li>3 The time zone of the original data as set by the Oracle BI Server Administrator (because the time zone is unknown for Oracle BI Presentation Services).</li> </ol>
Data display	<ol style="list-style-type: none"> <li>1 The setting that a report creator makes.</li> <li>2 The setting of the DATA_DISPLAY_TZ session variable.</li> <li>3 The setting of the &lt;DefaultDataDisplay&gt; element in the instanceconfig.xml file.</li> <li>4 <a href="#">“User-Preferred Time Zone”</a></li> </ol>
General time stamps (not including column data and log files)	<ol style="list-style-type: none"> <li>1 <a href="#">“User-Preferred Time Zone”</a></li> <li>2 The time zone for Oracle BI Presentation Services.</li> </ol>
Log file information	<ol style="list-style-type: none"> <li>1 The setting of the &lt;Logging&gt; element in the instanceconfig.xml file.</li> <li>2 The time zone for Oracle BI Presentation Services.</li> </ol>

## User-Preferred Time Zone

The user-preferred time zone is determined by the following:

- 1 The specification that a user makes on the My Account screen in Answers.
- 2 The setting of the TIMEZONE session variable.
- 3 The setting of the <DefaultUserPreferred> element in the instanceconfig.xml file.

## Where Time Zone Specifications Are Stored

Whenever a time zone specification appears in a drop-down list or as the value of a session variable or element in the Oracle BI Presentation Services configuration file (instanceconfig.xml), that specification originates from the TimeZones.xml file. This file is stored in the SADATADIR\common\timezone directory, where SADATADIR is the data directory.

The TimeZones.xml file contains nearly all time zones from around the world. You should not need to add zones to this file, but you are free to edit this file if you care to. You can choose to delete those zones that users in your organization will never use.

## Specifying Time Zone Values

Various editors show the ampersand that appears in time zone values in one of two ways: either the ampersand character itself or its escape sequence. Use care when entering a time zone value, as follows:

- When you use the ampersand in the value of a session variable, include the ampersand character (&) in the value, such as "Pacific Time (US & Canada); Tijuana".
- When you use the ampersand in the value of an element in the Oracle BI Presentation Services configuration file (instanceconfig.xml), include the escape sequence for the ampersand in the value, such as "Pacific Time (US & Canada); Tijuana"

## Description of Time Zone Settings

Table 4 describes the session variables and the elements in the Oracle BI Presentation Services configuration file (instanceconfig.xml) with which you set time zones. When you include elements in the instanceconfig.xml file, then you specify the time zone that all users see. When you use session variables, you can specify a different time zone for each user. If you use session variables and you specify values for the appropriate elements in the instanceconfig.xml file, then the values of the session variables override the settings in the instanceconfig.xml file.

Table 4. Time Zone Settings

Element	Session Variable	Description	Value
<DefaultDataOffset>	DATA_TZ	<p>The time zone offset of the original data. To allow the time zone to be converted so that users see the appropriate zone, you must set the value of this element or variable.</p> <p>If you do not set this, then no time zone conversion occurs because the value is "unknown".</p> <p>For example, suppose you want to convert to Eastern Standard Time (EST), which is Greenwich Mean Time (GMT) - 5. You must specify this value to enable the conversion to EST.</p>	<p>An offset that indicates a number of hours away from GMT time. For example:</p> <p>"GMT-05:00" or "-300", which means minus 5 hours.</p>
<DefaultDataDisplay>	DATA_DISPLAY_TZ	<p>Specifies the time zone to use for displaying data.</p> <p>If you do not set this, the value is the <a href="#">"User-Preferred Time Zone"</a>.</p>	<p>One of the time zones that are specified in the TimeZones.xml file.</p> <p>See <a href="#">"Specifying Time Zone Values."</a></p>
<DefaultUserPreferred>	TIMEZONE	<p>Specifies the users' default preferred time zone before they select their own on the My Account screen in Answers.</p> <p>If you do not set this, the value is the local time zone from Oracle BI Presentation Services.</p>	<p>One of the time zones that are specified in the TimeZones.xml file.</p> <p>See <a href="#">"Specifying Time Zone Values."</a></p>

Table 4. Time Zone Settings

Element	Session Variable	Description	Value
<Logging>	na	The time zone of the time stamps that appear in log files that are generated by Oracle BI Presentation Services.  If you do not set this, the value is the local time zone from Oracle BI Presentation Services	One of the time zones that are specified in the TimeZones.xml file.  See <a href="#">"Specifying Time Zone Values."</a>
<TimeZone>	na	The parent element for the elements that affect the preferred time zone. A child of the <ServerInstance> element.	na

## Example: Configuration File Settings for Specifying the Time Zone

The following shows a sample section of the Oracle BI Presentation Services configuration file (instanceconfig.xml) in which the <TimeZone> element has been added.

```
<TimeZone>
  <Default tDataOffset>0</Default tDataOffset>
  <Logging>(GMT-08:00) Paci fi c Ti me (US & Canada); Ti j uana</Logging>
  <Default tUserPreferred>(GMT-08:00) Paci fi c Ti me (US & Canada); Ti j uana</Default tUserPreferred>
  <Default tDataDi spl ay>(GMT-06:00) Central Ti me (US & Canada)</Default tDataDi spl ay>
</TimeZone>
```

## Managing the Oracle BI Presentation Services Cache Settings

The entries described in this section are available for managing the Oracle BI Presentation Services cache:

- ["Specifying the Maximum Amount of Time an Entry Can Exist in the Oracle BI Presentation Services Cache" on page 30](#)
- ["Specifying the Least Amount of Time an Entry Can Exist in the Oracle BI Presentation Services Cache" on page 30](#)

- [“Specifying the Least Amount of Time an Entry Can Exist in the Oracle BI Presentation Services Cache After Use” on page 30](#)
- [“Specifying the Maximum Number of Oracle BI Presentation Services Open Record Sets” on page 31](#)

The cache is accessed when users make requests in Answers. This is not the same cache that is accessed by the Oracle BI Server. You can change the internal defaults by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the cache entries.

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

## Specifying the Maximum Amount of Time an Entry Can Exist in the Oracle BI Presentation Services Cache

You can override the maximum amount of time, in minutes, that an entry in the cache can exist before it is removed. The internal default is 60 (one hour).

Depending on (the number of requests being run, an entry may be removed before the time limit expires.

**NOTE:** The setting for `CacheMinUserExpireMinutes`, described in [“Specifying the Maximum Amount of Time an Entry Can Exist in the Oracle BI Presentation Services Cache,”](#) can force an entry for a particular user to exist for a longer time than that specified by `CacheMaxExpireMinutes`.

The following entry is an example:

```
<CacheMaxExpireMinutes>60</CacheMaxExpireMinutes>
```

## Specifying the Least Amount of Time an Entry Can Exist in the Oracle BI Presentation Services Cache

You can override the minimum amount of time, in minutes, that an entry in the cache can exist before it is removed. The internal default is 10.

The following entry is an example:

```
<CacheMinExpireMinutes>10</CacheMinExpireMinutes>
```

## Specifying the Least Amount of Time an Entry Can Exist in the Oracle BI Presentation Services Cache After Use

You can override the minimum amount of time, in minutes, that an entry in the cache can exist after it has been viewed by a user. The internal default is 10.

For example, if `CacheMaxExpireMinutes` is set to 60 minutes and a user views the entry during the 59th minute, the entry exists for that user for an additional 10 minutes. The user can continue paging through the data without requiring a new request to be run.

The following entry is an example:

```
<CacheMinUserExpireMinutes>10</CacheMinUserExpireMinutes>
```

## Specifying the Maximum Number of Oracle BI Presentation Services Open Record Sets

You can override the maximum number of open record sets that Oracle BI Presentation Services keeps open at any one time. The internal default is 10. The minimum value is 3. For systems under significant loads, you can increase this value to 500 or 1000.

The following entry is an example:

```
<CacheMaxEntries>100</CacheMaxEntries>
```

# Configuring the Oracle BI Presentation Services Cookie Domain

You can configure the cookie domain by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the following entries:

- ["Specifying Oracle BI Presentation Services Cookie Domain Information" on page 31](#)
- ["Overriding the Oracle BI Presentation Services Cookie Domain Path" on page 31](#)
- ["Specifying the Expiration Date for Persisted Oracle BI Presentation Services Cookies" on page 31](#)

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read ["Making Oracle BI Presentation Services Configuration Changes" on page 15](#).

## Specifying Oracle BI Presentation Services Cookie Domain Information

You can specify domain information for a cookie sent to the browser. There is no default value.

The following entry is an example:

```
<CookieDomain>value</CookieDomain>
```

## Overriding the Oracle BI Presentation Services Cookie Domain Path

You can override the domain path that cookies apply to. The internal default is "/".

The following entry is an example:

```
<CookiePath>/usr/local/test/cookies</CookiePath>
```

## Specifying the Expiration Date for Persisted Oracle BI Presentation Services Cookies

You can override the date on which persisted cookies expire by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the following entry. For example, remembered passwords expire on this date (read ["Disabling the Oracle BI Presentation Services Feature to Remember Users' Names and Passwords" on page 18](#)). The default value is "Tue, 31 Dec 2030 23:59:59 GMT".

The format for the date is "day, dd mon year hh:mm:ss GMT", where:

day	The standard three-letter abbreviation for the day of the week.
dd	The 2-digit day of the month.
mon	The standard three-character abbreviation for the month.
year	The 4-digit year.
hh:mm:ss	The hour, minutes and seconds.
GMT	The time zone, Greenwich Mean Time.

You should not change this entry.

The following entry is an example:

```
<CookieExpiry>Tue, 31 Dec 2040 23:59:59 GMT<\CookieExpiry>
```

## Managing Oracle BI Presentation Services URL Generation and Resource File Location

You can override how Oracle BI Presentation Services generates URLs and where resource files are located by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the following entries:

- ["Specifying How Oracle BI Presentation Services Command URLs Are Generated" on page 32](#)
- ["Specifying How Oracle BI Presentation Services Static URLs Are Generated" on page 33](#)
- ["Specifying the Location of Oracle BI Presentation Services Primary Resource Files" on page 33](#)
- ["Specifying the Path to Oracle BI Presentation Services Primary Resource Files" on page 34](#)
- ["Specifying the Location of Oracle BI Presentation Services Nonprimary Resource Files" on page 34](#)
- ["Specifying the Path to Oracle BI Presentation Services Nonprimary Resource Files" on page 35](#)
- ["Specifying Whether Oracle BI Presentation Services Generates Fully Qualified URLs" on page 35](#)

You need to create the elements <URL> and </URL> after the <ServerInstance> element, and place your entries between the <URL> and </URL> elements.

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read ["Making Oracle BI Presentation Services Configuration Changes" on page 15](#).

**NOTE:** Most of the URL entries are interrelated.

### Specifying How Oracle BI Presentation Services Command URLs Are Generated

You can specify how Oracle BI Presentation Services generates command URLs.

If you explicitly specify an entry, it must be of the following form:



protocol : //server/*virtual path*

where *virtual path* is the complete virtual path to Oracle BI Presentation Services. The default is determined separately for each client, based on the URL sent by the client to Oracle BI Presentation Services.

The following entry is an example:

```
<URL>
  <AbsoluteCommandURLPrefix>value</AbsoluteCommandURLPrefix>
</URL>
```

## Specifying How Oracle BI Presentation Services Static URLs Are Generated

You can specify how Oracle BI Presentation Services generates URLs for static resources such as images, script files, style sheets, and other user-specified files. The default is protocol://server from the URL\AbsoluteCommandURLPrefix setting, described in [“Specifying How Oracle BI Presentation Services Command URLs Are Generated” on page 32](#).

If you explicitly specify an entry, it must be of this form:

protocol : //server

If you specify a virtual path, it is removed.

This entry designates a separate Web server for delivering static resources, thereby reducing the load on the main Web server. This prefix will be used for the resources that have a fully qualified virtual path of the form ‘/Path/file’. If a resource file has a relative virtual path of the form ‘Path/file’, the prefix used is the same used for commands to the Oracle BI Presentation Services extension.

The following entry is an example:

```
<URL>
  <ResourceServerPrefix>value</ResourceServerPrefix>
</URL>
```

## Specifying the Location of Oracle BI Presentation Services Primary Resource Files

You can override the physical location of Oracle BI Presentation Services’ primary resource files (these are the resource files distributed with Oracle BI Presentation Services, not user-customized files such as custom styles or skins). The internal default is \$(SAROOTDIR)\web\app\res.

You must provide a full path. Oracle BI Presentation Services must have read permission to this path. For example, if this is a shared network resource, you need to make sure that the user under which Oracle BI Presentation Services is running has read access to the share, as well as read access to the file system the share is exported from.

**NOTE:** If the value for this entry is different from the physical location of the Oracle BI Presentation Services DLLs, you must specify a setting for URL\ResourceVirtualPath, described in [“Specifying the Path to Oracle BI Presentation Services Primary Resource Files” on page 34](#).

The following entry is an example:

```
<URL>
  <ResourcePhysicalPath>value</ResourcePhysicalPath>
</URL>
```

## Specifying the Path to Oracle BI Presentation Services Primary Resource Files

You can override the virtual path used for Oracle BI Presentation Services' primary resource files as specified by the setting URL\ResourcePhysicalPath, described in ["Specifying the Location of Oracle BI Presentation Services Nonprimary Resource Files" on page 34](#). These resource files and customer-defined resource files must be served from the same Web server.

For generating relative URLs, the virtual path defaults to Res, assuming that the resource folder is present under the same virtual directory as the Oracle BI Presentation Services DLL files.

For generating absolute URLs, the entry of the value URL\AbsoluteCommandURLPrefix is used as the default.

The value must be a fully qualified virtual path of this form:

```
' /Virtual Path'
```

If you omit the leading slash, one will be added.

The following entry is an example:

```
<URL>
  <ResourceVirtualPath>value</ResourceVirtualPath>
</URL>
```

## Specifying the Location of Oracle BI Presentation Services Nonprimary Resource Files

You can override the physical location of resource files that are not part of a default installation. Such resource files include customized styles and skins. The internal default is \$(SADATADIR)\web\app\res.

You must provide a full path. Oracle BI Presentation Services must have read permission to this path. For example, if this is a shared network resource, you need to make sure that the user under which Oracle BI Presentation Services is running has read access to the share, as well as read access to the file system the share is exported from.

The following entry is an example:

```
<URL>
  <CustomerResourcePhysicalPath>value</CustomerResourcePhysicalPath>
</URL>
```

## Specifying the Path to Oracle BI Presentation Services Nonprimary Resource Files

You can override the virtual path used for resource files that are not part of a default installation as specified in the setting `URL\CustomerResourcePhysicalPath`, described in [“Specifying the Location of Oracle BI Presentation Services Nonprimary Resource Files” on page 34](#). The internal default is `Res.`

The following entry is an example:

```
<URL>
  <CustomerResourceVirtualPath>va/ue</CustomerResourceVirtualPath>
</URL>
```

## Specifying Whether Oracle BI Presentation Services Generates Fully Qualified URLs

You can override whether Oracle BI Presentation Services always generates fully qualified URLs for resource files that have fully qualified virtual paths. The internal default is `No`.

When set to `No`, resources and the Oracle BI Presentation Services extension are served from one server. When set to `Yes`, default resources are served from the same server as the Oracle BI Presentation Services extension, and customer resources are served from another server. Depending on the value of the other settings described in this section, you could also set it up to have default and customer resources served from one server, and the Oracle BI Presentation Services extension served from another server.

The following entry is an example:

```
<URL>
  <ForceAbsoluteResourceURL>va/ue</ForceAbsoluteResourceURL>
</URL>
```

# Specifying the Default Language for the Oracle BI Presentation Services Login Screen

The default language in which the Oracle BI Presentation Services login screen appears is obtained from the user's client browser settings. The following procedure explains how to change the language.

**NOTE:** The following procedure uses Internet Explorer 6.0 as an example. If you are using a different browser, make the necessary substitutions.

### *To change the default language on a user's login screen*

- 1 In Internet Explorer, choose **Tools > Internet Options**.

The Internet Options dialog box appears.

**2** Click Languages.

The Language Preference dialog box appears.

Installed languages appear in the Languages list. The language at the top of the list is used as the default language.

**3** If the desired language is not installed on the browser, add it.

**4** Use the Move Up and Move Down buttons to position the desired language at the top of the list.

**5** Restart the browser and log into Oracle BI Presentation Services.

The default language should match the language in the browser's Language list.

**NOTE:** If a user does not select a different language from the drop-down list on the login screen, the setting for the User Interface Language at the user's My Account screen determines the language in which the user interface is displayed.

## Specifying Whether to Allow HTML Input in Oracle BI Presentation Services Fields

The HardenXSS element secures Oracle BI Presentation Services against cross-site scripting (XSS). Securing against XSS prohibits HTML input in fields in Oracle BI Presentation Services that would otherwise accept HTML.

By default, Oracle BI Presentation Services is secured against XSS, which means that users cannot enter HTML; instead they can enter only plain text. If you want to allow users to enter HTML, add the HardenXSS element to the Oracle BI Presentation Services configuration file (instanceconfig.xml) and set it to false.

**NOTE:** In a secure environment (that is, by default or when HardenXSS is set to true), only resources (images) that are located in Oracle BI Presentation Services may be used. These images are referenced using a relative path prefixed with "fmap:" (for example, fmap:images/someimage.gif) and cannot be retrieved using a full URL (for example, http://www.somewhere.com/images/someimage.gif).

HardenXSS does not handle views that may contain HTML (Narrative, Ticker, Static Text, and No Results) or the Advanced Tab. Instead, you must deny access to the following privileges for untrusted users:

- View Narrative
- View Ticker
- View Static Text
- View No Results
- Answers: Access Advanced Tab

For more information on permissions, see ["About Setting Oracle BI Presentation Services Privileges" on page 152](#).

The following entry is an example:

```
<ServerInstance>
  <HardenXSS>false</HardenXSS>
</ServerInstance>
```

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read ["Making Oracle BI Presentation Services Configuration Changes" on page 15](#).

## Using the Javahost Service in Oracle BI Presentation Services

The Javahost service gives Oracle BI Presentation Services the ability to use functionality provided by Java libraries. It supports the following components:

- Chart generation (Corda)

- SVG renderer (Apache Batik)
- Java tasks support for Oracle BI Scheduler
- Oracle BI Publisher

## Starting and Stopping the Javahost Service

The Javahost service starts and stops automatically, so typically there is no need to start and stop it independently. However, if you need to make configuration changes, you should edit the Javahost configuration file `config.xml` and the Oracle BI Presentation Services configuration file (`instanceconfig.xml`), shut down the Javahost service, and then restart it.

The Javahost service has two execution modes:

- **Service mode.** Javahost is running in the background, its console is not visible and the user is not required to be logged on to the computer. This mode is the normally production environment mode.
- **Console mode.** Javahost is running in the user console. This mode is useful for troubleshooting purposes, because it displays messages.

### *To start or stop the Javahost service in UNIX*

- Source the `(SAROOTDIR)/setup/common.sh` file and then use the `(SAROOTDIR)/web/javahost/bin/run.sh` command:
  - To start it in Service mode, use a `"-service"` command line switch.
  - To stop the Javahost service, use the `(SAROOTDIR)/web/javahost/bin/shutdown.sh` command.

This utility opens a TCP/IP connection to Javahost and sends a shutdown signal to it.

### *To start or stop the Javahost service in Windows*

- To start or stop the Javahost service in Service mode, use the Services control panel and start or stop the Oracle Business Intelligence Javahost Service.
- To start and stop the Javahost service in Console mode requires using the command line:
  - To start it, run `<SAROOTDIR>/web/bin/sawjavahostsvc.exe`.
  - To stop it, press `Ctrl+C`.

## Javahost Service Command Line Options

When using the command line in UNIX and Windows, you can specify some command line options.

In UNIX, the command line for starting the Javahost service is:

```
run.sh [-h] [-service] [-Config Javahostconfig]
```

In UNIX, the command line for stopping the Javahost service is:

```
shutdown.sh [-h] [-Config Javahostconfig] [-Port port] [-Host host]
```

In Windows, the command line for starting the Javahost service in Console mode is:

```
sawj avahostsvc.exe [-regserver instancename | -regserverauto instancename |  
-unregserver instancename | -h | -service -V ] [-user username] [-pwd password]  
[-SAWConfig instanceconfig] [-Config Javahostconfig]
```

**NOTE:** You can specify multiple Javahost configuration files (config.xml) and multiple Oracle BI Presentation Services configuration files (instanceconfig.xml). You might want to have multiple Javahost configuration files, for example, if you want to define all components supported by Javahost services and other necessary settings in one file and then modify the listening port and selectively enable and disable components supported by Javahost services in another file.

If you specify multiple files, the configuration elements are merged and the precedence of values in the files is based on the order in which the files are specified.

For example:

```
sawj avahostsvc.exe /SAWConfig .. /OracleBI Data/web/config/instanceconfig.xml /Config  
.. /javahost/config/config.xml /Config .. /javahostconfigs/config.xml
```

Table 5 lists and describes the command line options.

Table 5. Javahost Service Command Line Options

Options	Operating Systems	Description
-regserver instancename	Windows	Registers the Oracle Business Intelligence Javahost service in manual startup mode.  (optional) The instancename parameter is used to register more than one Javahost service on the same machine. If specified, the Javahost service name is set to OracleBI Java Host <instancename>.
-regserverauto instancename	Windows	Registers the Oracle Business Intelligence Javahost service in automatic startup mode.  (optional) The instancename parameter is used to register more than one Javahost service on the same machine. If specified, the Javahost service name is set to OracleBI Java Host <instancename>.
-unregserver instancename	Windows	Unregisters the Oracle Business Intelligence Javahost service.  (optional) The instancename parameter is used when more than one Javahost service is registered on the same machine.

Table 5. Javahost Service Command Line Options

Options	Operating Systems	Description
-service	UNIX, Windows	Executes Javahost in Service mode. On Windows, this parameter should never be used explicitly. Instead, use the control panel Services applet to start and stop the Oracle Business Intelligence Javahost service.
-V	Windows	Displays the version.
-user username	Windows	Specifies the username for the user account which will be used by Windows to launch Javahost service. Used in conjunction with the -regserver and -regserverauto options.
-pwd password	Windows	Specifies the password for the user account which will be used by Windows to launch Javahost service. Used in conjunction with the -regserver and -regserverauto options.
-SAWConfig instanceconfig	UNIX, Windows	Specifies the path to Oracle BI Presentation Services configuration file (instanceconfig.xml). The default path is: SADATADIR/web/config/instanceconfig.xml (where SADATADIR is the data directory)
-Config Javahostconfig	UNIX, Windows	Specifies the path to config.xml. The default path is: SAROOTDIR\web\javahost\config (where SAROOTDIR is the installation directory)  <b>NOTE:</b> You should use -Config when stopping a Javahost service that uses an SSL connection so that required SSL configuration parameters can be read.
-Port port	UNIX	Identifies the Javahost listening port.
-Host hostname	UNIX	Identifies the computer running the Javahost service.

In UNIX, the shutdown.sh parameters serves one purpose, which is to pass connection information (host and port) so that a shutdown signal can be sent to the Javahost service. The following rules explain how these parameters interact:

- If either the -Host or the -Port parameter is specified, then shutdown.sh ignores the -Config parameter.
- If -Host is specified and -Port is not, then shutdown.sh uses 9810 as the port number.



- If the -Config parameter is set, then shutdown.sh uses the instanceconfig.xml file to find the Javahost listening port. It expects that the Javahost service is running on the local computer (Host=localhost).
- If no parameters are specified, then shutdown.sh uses Host=localhost and port=9810.

## Javahost Service Command Line Properties

The locations of special directories, such as the root directory, in the Oracle Business Intelligence environment are passed to Javahost services through Java properties.

These properties are set automatically by the Java command line as follows:

- In Windows, by the sawjavahostsvc command
- In UNIX, the saw.sh script, located in the SAROOTDIR/setup directory (where SAROOTDIR is the installation directory)

You can modify these properties by explicitly setting these property values while configuring the Java command line.

Table 6 lists and describes the Javahost Service command line properties.

Table 6. Javahost Service Command Line Properties

Property	Description
oracle.bi.presentation.coreconfigdir	SAROOTDIR\web\config directory (where SAROOTDIR is the installation directory)
oracle.bi.presentation.dataconfigdir	SADATADIR\web\config directory (where SADATADIR is the data directory)
oracle.bi.rootdir	SAROOTDIR directory (where SAROOTDIR is the installation directory)
oracle.bi.presentation.rootdir	SAROOTDIR\web directory (where SAROOTDIR is the installation directory)
oracle.bi.tempdir	Temporary directory
oracle.bi.javahostdir	Javahost root directory
oracle.bi.presentation.cordaroot	Corde root directory

## Configuring the Javahost Service

To configure the Javahost service, you edit Javahost Service configuration elements in the following files:

- Javahost configuration file (config.xml), located in the SAROOTDIR\web\javahost\config directory (where SAROOTDIR is the installation directory)

For more information on the elements that you can edit, see [“Javahost Service Configuration Elements in the config.xml file” on page 42](#).

- Oracle BI Presentation Services configuration file (instanceconfig.xml), located in the SADATADIR\web\config directory (where SADATADIR is the data directory)

For more information on the elements that you can edit, see [“Javahost Service Configuration Elements in the instanceconfig.xml File” on page 45](#).

## Javahost Service Configuration Elements in the config.xml file

Table 7 lists and describes the Javahost service elements in the Javahost configuration file (config.xml). The elements are identified by their relative path starting from the /JavaHost element.

Table 7. Javahost Service Configuration Elements in config.xml

Element	Description
Loaders	Contains the following elements: <ul style="list-style-type: none"><li>■ ListOfEnabledLoaders</li><li>■ Loader (there can be multiple Loader elements)</li></ul>
Loaders/ListOfEnabledLoaders	List of components (such as PDF, Charts, Oracle BI Publisher, and so on) to be enabled.  If this element is missing from the file, then all Loaders are enabled. If the element has an empty value, then all loaders are disabled.  Each component has a corresponding Loader element. The name of the component listed here must match the name specified in the corresponding Loader/Name element.
Loaders/Loader	Contains the following elements, which specify configuration information for a specific component: <ul style="list-style-type: none"><li>■ Name</li><li>■ Class</li><li>■ ConfigNodePath</li><li>■ ClassPath</li></ul>
Loaders/Loader/Name	Specifies the unique name of the component. Use this name in the ListOfEnabledLoaders.
Loaders/Loader/Class	Specifies the Loader main class for the component.
Loaders/Loader/ConfigNodePath	Specifies the XPath (starting from the /Javahost element) to the configuration information for the Loader

Table 7. Javahost Service Configuration Elements in config.xml

Element	Description
Loaders//Loader/ClassPath	Specifies the class path.
MessageProcessor	Contains the SocketTimeout element.
MessageProcessor/SocketTimeout	<p>Specifies the idle timeout (in milliseconds) for socket after which socket is returned to the idle sockets pool. Javahost uses a socket polling mechanism to wait for new data on the whole set of idle sockets in a single thread.</p> <p>Default: 5000 (5 seconds)</p>
Listener	<p>Contains the following elements:</p> <ul style="list-style-type: none"> <li>■ PermittedClientList</li> <li>■ Port</li> <li>■ Address</li> <li>■ Secure</li> </ul>
Listener/PermittedClientList	<p>Specifies a list of IP addresses and host names from which Javahost accepts incoming connections. Separate each client by a comma. To accept all client connections, set this element to an asterisk (*).</p> <p>Default: *</p>
Listener/Port	<p>Identifies the Javahost TCP/IP listening port.</p> <p>Default: 9810</p> <p>For information on using the Hosts/Host element to identify specific instances of Javahost processes, see <i>Oracle Business Intelligence Enterprise Edition Deployment Guide</i>.</p>
Listener/Address	<p>Specifies the network interface that Javahost is to bind to. If this element has no value, Javahost will bind to all available network interfaces.</p>
Listener/Secure	<p>Specifies whether to enable SSL encryption:</p> <ul style="list-style-type: none"> <li>■ Yes: Enables SSL encryption</li> <li>■ No: Disables SSL encryption</li> </ul> <p>Default: No</p> <p>For more information on SSL, see <i>Oracle Business Intelligence Enterprise Edition Deployment Guide</i>.</p>

Table 7. Javahost Service Configuration Elements in config.xml

Element	Description
Charts	<p>Contains the following elements:</p> <ul style="list-style-type: none"> <li>■ InputStreamLimitInKB</li> <li>■ ChartRoot</li> <li>■ CordaRoot</li> <li>■ EnableConsoleOutput</li> </ul>
Charts/InputStreamLimitInKB	<p>Specifies the maximum input size for charts requests. A value of zero deactivates this limit. If you cannot generate a chart using the default value, slowly increase this setting until you find the optimum value.</p> <p>Default: 1024</p>
Charts/ChartRoot	<p>Specifies the path to the Corda chart_root directory.</p> <p>Default: {CordaRoot}/chart_root.</p>
Charts/CordaRoot	<p>Specifies the path to the Corda installation.</p> <p>Default: SAROOTDIR/Corda50 (where SAROOTDIR is the installation directory)</p>
Charts/EnableConsoleOutput	<p>Specifies whether to enable the Corda console diagnostic messages:</p> <ul style="list-style-type: none"> <li>■ Yes: Enables the Corda console diagnostic messages</li> <li>■ No: Disables the Corda console diagnostic messages</li> </ul> <p>Default: No</p>
Scheduler	<p>Contains these elements:</p> <ul style="list-style-type: none"> <li>■ Enabled</li> <li>■ DefaultPurgingPeriod</li> </ul>
Scheduler/Enabled	<p>Specifies whether to enable Scheduler:</p> <ul style="list-style-type: none"> <li>■ True: Enables Scheduler</li> <li>■ False: Disables Scheduler</li> </ul> <p>Default: False</p>
Scheduler/DefaultUserJarFilePath	<p>Specifies the default directory for users to put their Java extension utility jar files in.</p> <p>When Scheduler is enabled, this element is required and accepts a single path.</p>

Table 7. Javahost Service Configuration Elements in config.xml

Element	Description
Scheduler/DefaultTempFilePath	Specifies the default temporary file directory for Scheduler requests.  Default: {systemtempdir} (where {systemtempdir} is the system temp directory)
Scheduler/DefaultPurgingPeriod	Specifies the default purging period (in seconds) for Scheduler requests to clean up failed jobs.  Default: 300
XMLP	Contains the InputStreamLimitInKB element.
XMLP/InputStreamLimitInKB	Specifies the maximum input size for Oracle BI Publisher requests. A value of zero deactivates this limit.  Default: 8192

## Javahost Service Configuration Elements in the instanceconfig.xml File

Table 8 lists and describes the Javahost service elements in the Oracle BI Presentation Services configuration file (instanceconfig.xml). The elements are identified by their relative path starting from the /WebConfig/ServerInstance element.

Table 8. Javahost Service Configuration Elements in instanceconfig.xml

Element	Description
JavaHome	Specifies the path to the root directory of JDK or JRE installation.  Default: Value of JAVA_HOME environment variable
JavaHost/InitLoggerDir	Specifies the absolute path to the directory where sawjavahostsvc.exe writes log information before it loads java. If the value of this element is empty, logging is disabled.  Default: SADATADIR/web/log/javahost (where SADATADIR is the data directory).
JavaHost/JniLibrary	Specifies the absolute path to jvm.dll.  Default: {JavaHome}/jre/bin/server/jvm.dll If that file does not exist, then: {JavaHome}/bin/server/jvm.dll, where {JavaHome} is the path to JDK or JRE installation.

Table 8. Javahost Service Configuration Elements in instanceconfig.xml

Element	Description
JavaHost/JVMOptions	Specifies the Java command line parameters. Default: -Xms128m -Xmx256m -Xrs "-Djava.class.path={CLASSPATH}" "-Djava.awt.headless=true" "-Djava.util.logging.config.file={JAVAHOSTROOTDIR}/config/logconfig.txt" where {CLASSPATH} is the list of javahost jar files separated by semicolons and {JAVAHOSTROOTDIR} is the Javahost root directory SADATADIR/web/javahost
JavaHost/UseDefaultJVMOptions	Specifies whether to use the default JVMOptions: <ul style="list-style-type: none"> <li>■ Yes: Merges the value of the JavaHost/JVMOptions element with its default value.</li> <li>■ No: Uses the value of the JavaHost/JVMOptions element, which specifies the exact command line for Java.</li> </ul> Default: Yes

## Javahost Service Logging

The Javahost service uses a standard Java logging engine. By default, Javahost uses a logging configuration file located at SADATADIR/web/config/logconfig.txt (where SADATADIR is the data directory). For the logging file format description, see publicly available Java documentation.

On Windows, several initialization messages could be written before Java is initialized. Use the JavaHost/InitLoggerDir configuration key to control the location where those messages are written.

## Configuration Keys

Use the Oracle BI Presentation Services configuration file (instanceconfig.xml) to configure many elements for Oracle BI Presentation Services behavior. Do not use any keys unless you are overriding the stated default values. You should keep the instanceconfig.xml file as short as possible and override only those settings that are necessary for configuring your implementation.

For organizations that use Oracle Application Server, Oracle recommends that you use Oracle Application Server Control to modify configuration files. For organizations that use other application servers, Oracle recommends that you use JConsole. For more information, see the *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*.

All configuration keys follow this format:

```
<key_name>value</key_name>
```

Example: add configuration keys for DefaultTimeoutMinutes (Level is "/") and MaxVisiblePages (level is "/PivotView") to instanceconfig.xml

```
<WebConfig>  
  <ServerInstance>  
    <CatalogPath>/OracleBI Data/web/catalog/default</CatalogPath>  
    <DSN>AnalyticWeb</DSN>  
    <DefaultTimeoutMinutes>3000</DefaultTimeoutMinutes>  
    <PivotView>  
      <MaxVisiblePages>2000</MaxVisiblePages>  
    </PivotView>  
  </ServerInstance>  
</WebConfig>
```





# 3

## Administering Oracle BI Answers

This chapter describes procedures that are used to administer Oracle BI Answers. For an introduction to Answers, read *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.

This chapter contains the following topics:

- [Managing Settings for the Oracle BI Presentation Services Chart Image Server on page 49](#)
- [Managing the Oracle BI Presentation Services Charting Settings on page 51](#)
- [Configuring Answers Pivot Table Settings on page 52](#)
- [Configuring the Maximum Number of Rows in an Answers Table View on page 53](#)
- [Adding Support for Navigation and Drill Down in Answers on page 54](#)
- [Changing the Default Currency in Answers on page 54](#)
- [Nesting Folders in the Selection Pane in Answers on page 55](#)
- [Blocking Requests in Answers on page 56](#)
- [Specifying View Defaults for Answers and Dashboards Users on page 60](#)
- [Changing Alternating Bar Color on page 65](#)

### Managing Settings for the Oracle BI Presentation Services Chart Image Server

Oracle BI Presentation Services uses a third-party charting engine to render charts (PopChart Image Server from CORDA Technologies, Inc.). You can override the default image type by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the following entries:

- ["Specifying the Oracle Business Intelligence Chart Image Type" on page 50](#)
- ["About Downloading and Using Flash as the Default Image Type in Oracle Business Intelligence" on page 50](#)

You need to create the elements `<Charts>` and `</Charts>` after the `<ServerInstance>` element, and place your entries between the `<Charts>` and `</Charts>` elements.

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read ["Making Oracle BI Presentation Services Configuration Changes" on page 15](#).

## Specifying the Oracle Business Intelligence Chart Image Type

You can override the image type generated by the PopChart Image Server. The internal default is Flash.

The other choices are SVG (W3C Scalable Vector Graphics), PNG (W3C Portable Network Graphics), and JPEG. Flash and SVG images provide the greatest degree of interaction because they support mouseover behaviors (such as pop-up data labels), navigation, and drilling.

The following entry is an example:

```
<Charts>
  <Default tImageType>PNG</Default tImageType>
</Charts>
```

## About Downloading and Using Flash as the Default Image Type in Oracle Business Intelligence

In some organizations, users are instructed to download the latest Flash software from a corporate location instead of the vendor's Web site. The default download source for Oracle BI Presentation Services is the vendor's Web site. You can modify the default download source to point to another location. Then, when users view a chart in Oracle Business Intelligence and a newer version of the Flash software is available on the corporate server, they can be prompted to download the newer version. This section contains the following topics:

- ["Modifying the Default Flash Download Source" on page 50](#)
- ["Enabling a Download Prompt for New Flash Versions" on page 50](#)

### Modifying the Default Flash Download Source

The default download source for the Flash plug-in is the vendor's Web site. You can change this to another location by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml) to point to the location that holds the Flash code base.

**NOTE:** You need to create the elements `<FlashCodeBase>` and `</FlashCodeBase>` after the `<Charts>` element, and place your entries between the `<FlashCodeBase>` and `</FlashCodeBase>` elements.

The following entry is an example:

```
<Charts>
  <FlashCodeBase>\\CORPORATE\Download\FI ash</FlashCodeBase>
</Charts>
```

### Enabling a Download Prompt for New Flash Versions

After modifying the default Flash download source, you can enable a download prompt by creating a new classID for the Flash ActiveX control to add a custom global identifier (clsid) property. You can obtain the current global identifier property from any machine where Oracle BI Presentation Services charting is being used. (The global identifier property used by Oracle Business Intelligence is D27CDB6E-AE6D-11CF-96B8-444553540000.) The custom global identifier property must contain the same number of characters and dashes as the global identifier used in the default Flash ActiveX control.

The following entry is an example:

```
<Charts>
  <FlashCLSID>E38CDB6E-BA6D-21CF-96B8-432553540000</FlashCLSID>
</Charts>
```

You should test flash charts independent of Oracle Business Intelligence to make sure that they function with the custom global identifier property.

## Managing the Oracle BI Presentation Services Charting Settings

You can change certain Oracle BI Presentation Services charting settings from their internal default settings by adding entries to the Oracle BI Presentation Services configuration file (instanceconfig.xml):

- ["Specifying the Location of Temporary Storage for Chart Cache in Oracle BI Presentation Services" on page 51](#)
- ["Specifying the Interactive Behavior of Charts in Oracle BI Presentation Services" on page 52](#)
- ["Specifying the URL for Chart Navigation in Oracle BI Presentation Services" on page 52](#)

You need to create the elements <Chart> and </Chart> after the <ServerInstance> element, and place your entries between the <Chart> and </Chart> elements.

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read ["Making Oracle BI Presentation Services Configuration Changes" on page 15](#).

### Specifying the Location of Temporary Storage for Chart Cache in Oracle BI Presentation Services

You can override the internal default entry for the location used by Oracle BI Presentation Services as temporary storage for chart cache. The internal default is dirletter:\SADATADIR\Temp\nQWCharts, where dirletter is the drive where the Oracle BI Presentation Services software is installed and SADATADIR is the data directory.

The location should be a fully-qualified path name, such as d:\OracleBIChartCache. The folder or directory structure must exist before you start the service for Oracle BI Presentation Services again.

The following entry is an example:

```
<Charts>
  <CacheDirectory>/usr/local/OracleBI/Data/temp/chartcache</CacheDirectory>
</Charts>
```

## Specifying the Interactive Behavior of Charts in Oracle BI Presentation Services

You can override the default interactive behavior of Oracle BI Presentation Services charts. Valid entries are Drill, Navigate and None. The default is Drill. This means that charts are created drillable by default.

If you specify Navigate, charts navigate to the URL described in [“Specifying the URL for Chart Navigation in Oracle BI Presentation Services” on page 52](#). If you specify None, charts are not interactive; for example, clicking on a chart or chart region does nothing.

The following entry is an example:

```
<Charts>
  <DefaultInteraction>Navigate</DefaultInteraction>
</Charts>
```

## Specifying the URL for Chart Navigation in Oracle BI Presentation Services

If you specify Navigate as the interactive behavior of charts (described in [“Specifying the Interactive Behavior of Charts in Oracle BI Presentation Services” on page 52](#)), you can override the default URL to which charts navigate. The internal default URL is <http://www.oracle.com/>.

If the interactive behavior is not Navigate, this entry is ignored.

The following entry is an example:

```
<Charts>
  <DefaultNavigationPath>http://www.intranet.com/</DefaultNavigationPath>
</Charts>
```

# Configuring Answers Pivot Table Settings

You can change certain pivot table settings from their internal defaults by adding entries to the <PivotView> element in the Oracle BI Presentation Services configuration file (instanceconfig.xml):

- [“Specifying the Maximum Number of Records to Process in an Oracle Business Intelligence Pivot Table”](#)
- [“Specifying the Maximum Number of Populated Cells in an Oracle Business Intelligence Pivot Table”](#)
- [“Specifying the Maximum Number of Sections in an Oracle Business Intelligence Pivot Table”](#)

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

## Specifying the Maximum Number of Records to Process in an Oracle Business Intelligence Pivot Table

You can override the maximum number of records that can be processed by a pivot table. The internal default is 20000.

The following entry is an example:

```
<CubeMaxRecords>30000</CubeMaxRecords>
```

## Specifying the Maximum Number of Populated Cells in an Oracle Business Intelligence Pivot Table

You can override the maximum number of populated cells that Oracle BI Presentation Services has in a pivot table. The internal default is 150000. If the user exceeds this value, the server returns an error message when the pivot table is rendered.

The following entry is an example:

```
<CubeMaxPopulatedCells>160000</CubeMaxPopulatedCells>
```

## Specifying the Maximum Number of Sections in an Oracle Business Intelligence Pivot Table

You can override the maximum number of sections that Oracle BI Presentation Services displays in a pivot table. The internal default is 1000.

The following entry is an example:

```
<MaxVisibleSections>500</MaxVisibleSections>
```

# Configuring the Maximum Number of Rows in an Answers Table View

You can override the maximum number of rows that can appear in a Table view by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the following entry. The internal default is 65000. If the user exceeds this value, the server returns an error message when the table view is rendered.

**NOTE:** This entry applies to the Table view, not the Pivot Table view.

The following entry is an example:

```
<ResultRowLimit>95000</ResultRowLimit>
```

The ResultRowLimit entry controls the maximum value that can be set for the DefaultRowsDisplayed, DefaultRowsDisplayedInDelivery, and the DefaultRowsDisplayedInDownload entries. To set DefaultRowsDisplayed, DefaultRowsDisplayedInDelivery, or DefaultRowsDisplayedInDownload to a value that exceeds the current value of ResultRowLimit, you also must increase the value of ResultRowLimit to equal or exceed the value that you want to set.

## Adding Support for Navigation and Drill Down in Answers

When you create a request, you can allow users to navigate to related requests and content. If the Oracle BI Server Administrator set up dimensions and dimensional hierarchies for the subject area, users can drill down on data results presented in charts, tables and pivot tables to obtain more detailed information.

There are no specific privilege settings that impact access to Oracle BI Presentation Services Navigation and drill down features, which are available to all users.

Dimensional hierarchies are a system of levels in a dimension that are related to each other by one-to-many relationships. For example, a region hierarchy might be defined as a postal code rolling up to a city, rolling up to a region. There is exactly one city and one region corresponding to a single postal code, but there might be many postal codes corresponding to a single city, and there might be many cities corresponding to a single region.

Users drill down to move through the dimensional hierarchies associated with the subject area to obtain more detailed results. For example, if the results contain a total sales column, the user might be able to click total sales to drill down on sales by region, and then click a region to display sales by city in that region. The information available to Oracle BI Presentation Services users through drill down is constrained by the dimensional hierarchies configured by the Oracle BI Server Administrator for the specific subject area.

For information about setting up dimensions and hierarchies, read *Oracle Business Intelligence Server Administration Guide*.

## Changing the Default Currency in Answers

You can change the default currency displayed in the Answers user interface, for example, from French Francs to Euros.

If you are using Oracle Business Intelligence applications, with no customizations, you only need to set the default data warehouse currency.

If you have created additional subject areas, the currency column data is in the number format, and you need to specify the currency for the customized subject area as described in the second procedure.

For more information about using formatting functions in Answers, read *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.

### *To set the default data warehouse currency*

- 1 Open the currencies.xml file in the directory \\SAROOTDIR\web\config, where SAROOTDIR is the installation directory.
- 2 Search for the currency to make the default, for example, USD, CAD, PEN, or MAD.

- 3 Copy the entire currency element.

For example, copy the currency tag for the Euro:

```
- <Currency tag="int: euro-l" type="international" symbol="_"
displayMessage="kmsgCurrencyEuroLeft" digits="2" format="$ #">

<negative tag="minus" format="- $ #" />

</Currency>
```

- 4 Search for the text string int:wrhs, located towards the top of the file.
- 5 Select the entire element and replace it by pasting the copied element over it.
- 6 Replace the tag attribute so it reads int:wrhs.  
For example, replace tag="int: euro-l" with tag="int: wrhs".
- 7 Restart the service for Oracle BI Presentation Services.

### *To specify the currency for customized subject areas*

- 1 In Answers, modify the request that uses the subject area.
- 2 Click the Format Column button for the currency column.  
The Column Properties dialog box appears.
- 3 At the Value Format tab, in the Data Format area, click the following option:  
Override Default Data Format
- 4 In the Treat Numbers As drop-down list, select Currency.
- 5 In the Currency Symbol drop-down list, select the currency symbol.
- 6 To save this as the system-wide default for this data type, click Save, and then select the appropriate option.
- 7 Click OK when you are done, and then repeat the preceding steps for any other columns to change.

## Nesting Folders in the Selection Pane in Answers

To make selections easy for users to discern in the selection pane, you can set up the presentation layer in the Oracle Business Intelligence Administration Tool to give the appearance of nested folders. For example, you can make the Sales Facts folder appear as a subfolder in the Facts folder. You can accomplish this during the construction of the presentation layer by prefixing the name of a folder to appear as a subfolder with a hyphen ( - ) and a space.

The preconfigured Oracle Business Intelligence repository for Oracle's Siebel operational applications provides examples of this construction. For more information, read *Oracle Business Intelligence Server Administration Guide*.

## Blocking Requests in Answers

You may want to block specific requests, such as requiring users to include certain columns with others, or requiring filters when certain columns are requested. Answers includes an API that you can use to block queries based on the criteria specified in the user's request, or based on formulas in the request. You can access the API using JavaScript to check conditions and validate requests.

This section contains the following topics:

- [Blocking Requests Based on Criteria on page 56](#)
- [Blocking Requests Based on Formula on page 57](#)
- [Validation Helper Functions on page 59](#)

### Blocking Requests Based on Criteria

When a user attempts to execute a request that your code blocks, you can display an error message, and the request will not be executed. The `answerstemplates.xml` file includes a message named `kuiCriteriaBlockingScript` that can be overridden to either define or include JavaScript that defines a `validateAnalysisCriteria` function. By default, this message contains a function that always returns `True`. It should be overridden using the procedures described in ["Customizing the Oracle BI Presentation Services User Interface Using XML Message Files" on page 192](#).

Answers calls your `validateAnalysisCriteria` function when the user tries to execute the request. The function can return `True` if the request is not blocked, or `False` or a message if the request is blocked. If a message or a value other than `False` is returned, the message is displayed in a popup window. In either case, the query is blocked.

The following code example shows the blocking of a query.

```
<?xml version="1.0" encoding="utf-8"?>
<WebMessageTables xmlns:sawm="com.siebel.analytics.web.messagesystem">
  <WebMessageTable system="QueryBlocking" table="Messages">

    <WebMessage name="kuiCriteriaBlockingScript" translate="no">
      <HTML>
        <script language="javascript" src="fmap:myblocking.js" />
      </HTML>
    </WebMessage>

  </WebMessageTable>
</WebMessageTables>
```

Sample blocking script in `.../OracleBI Data/web/res/myblocking.js`

```
// This is a blocking function. It makes sure users pick what I want them to.
function validateAnalysisCriteria(analysiXml)
{
  // Create the helper object
  var tValidator = new CriteriaValidator(analysiXml);
```



```

// Validation Logic
if (tValidator.getSubjectArea() != "Paint")
    return "Why don't you try Paint?";

if (!tValidator.dependentColumnExists("Markets", "Region", "Markets", "District"))
{
    // If validation script notifies user, then return false
    alert("Region and District go so well together, don't you think?");
    return false;
}

if (!tValidator.dependentColumnExists("Sales Measures", "", "Periods", "Year"))
    return "You picked a measure so pick Year!";

if (!tValidator.filterExists("Sales Measures", "Dollars"))
    return "Why don't you filter on Dollars?";

if (!tValidator.dependentFilterExists("Markets", "Market", "Markets"))
    return "Since you're showing specific Markets, please filter the markets.";

var n = tValidator.filterCount("Markets", "Region");
if ((n <= 0) || (n > 3))
    return "Please select 3 or fewer specific Regions";

return true;
}

```

If you do not override the function using the template as described previously, or if the function returns anything other than False, the criteria is considered to be valid and the request is issued. The criteria is validated using this same mechanism for preview and save operations as well.

## Blocking Requests Based on Formula

Answers provides a hook to create and incorporate a JavaScript validation function that is called from Answers when a user enters or modifies a column formula. If the call fails and returns a message, Answers displays the message and cancels the operation. Additionally, helper functions are available so the query blocking function can check for filters, columns, and so on, rather than traversing the DOM manually. For more information on the helper functions, read [“Validation Helper Functions” on page 59](#).

The criteriatemplates.xml file includes a message named kuiFormulaBlockingScript that can be overridden to include JavaScript that defines a validateAnalysisFormula function. By default, this message contains a function that always returns True.

Answers calls validateAnalysisFormula before applying changes made by the user. If the function returns True, the formula is accepted. If the function returns False, the formula is rejected. Otherwise, the return value from the function is displayed in the message area beneath the formula, as it does currently when an invalid formula is entered.

The user has the option to click OK to ignore the error. To display your own alert and allow the user to continue, your function should return True. To block the query, return False or a message. Your function should investigate the formula passed to it using JavaScript string and regular expression techniques for validation.

The following code example shows a sample custom message.

```
<?xml version="1.0" encoding="utf-8"?>
<WebMessageTables xmlns:sawm="com.siebel.analytics.web.messageSystem">
  <WebMessageTable system="QueryBlocking" table="Messages">

    <WebMessage name="kui FormulaBlockingScript" translate="no">
      <HTML>
        <script language="javascript" src="fmap:myblocking.js" />
      </HTML>
    </WebMessage>

  </WebMessageTable>
</WebMessageTables>
```

The following code example shows blocking based on the formula entered.

```
// This is a formula blocking function. It makes sure the user does not enter an
// unacceptable formula.
function validateAnalysisFormula(sFormula, sAggRule)
{
  // we don't allow the use of concat || in our formulas
  var concatRe = /\|\|/gi;
  var nConcat = sFormula.search(concatRe);
  if (nConcat >= 0)
    return "You used concatenation (character position " + nConcat + "). That is
not allowed.";

  // no case statements please
  var caseRe = /CASE.+END/gi;
  if (sFormula.search(caseRe) >= 0)
    return "Please do not use a case statement.";

  // Check for a function syntax: aggrule(formula) aggrule should not contain a '.'
  var castRe = /^s*w+s*\(.+\)\s*$/gi;
  if (sFormula.search(castRe) >= 0)
    return "Please don't use a function syntax such as RANK() or SUM().";

  return true;
}
```

## Validation Helper Functions

These functions are defined within a JavaScript file named `answers/queryblocking.js`. [Table 9](#) contains the list of helper functions and their descriptions.

Table 9. Validation Helper Functions

Validation Helper Function	Description
<code>CriteriaValidator.getSubjectArea()</code>	Returns the name of the subject area referenced by the request. It generally is used in a switch statement within the function before doing other validation. If the request is a set-based criteria, it returns null.
<code>CriteriaValidator.tableExists(sTable)</code>	Returns True if the specified table has been added to the request by the user, and False if the table was not added.
<code>CriteriaValidator.columnExists(sTable, sColumn)</code>	Returns True if the specified column has been added to the request by the user, and False if the column was not added.
<code>CriteriaValidator.dependentColumnExists(sCheckTable, sCheckColumn, sDependentTable, sDependentColumn)</code>	Checks to make sure that the dependentColumn exists if the checkColumn is present. It returns True if either the checkColumn is not present, or the checkColumn and the dependent column are present. If checkColumn and dependentColumn are null, the tables are validated. If any column from checkTable is present, a column from dependentTable must be present.
<code>CriteriaValidator.filterExists(sFilterTable, sFilterColumn)</code>	Returns True if a filter exists on the specified column, and False if no filter is present.
<code>CriteriaValidator.dependentFilterExists(sCheckTable, sCheckColumn, sFilterTable, sFilterColumn)</code>	Checks to make sure that the dependentFilter exists if the checkColumn is present in the projection list. It returns True if either the checkColumn is not present, or the checkColumn and the dependent filter are present.
<code>CriteriaValidator.filterCount(sFilterTable, sFilterColumn)</code>	Returns the number of filter values specified for given logical column. If the filter value is "equals," "null," "notNull," or "in," it returns the number of values chosen. If the column is not used in a filter, it returns zero. If the column is prompted with no default, it returns -1. For all other filter operators (such as "greater than," "begins with," and so on) it returns 999, because the number of values cannot be determined.

## Specifying View Defaults for Answers and Dashboards Users

You can control some aspects of the initial state of new views that are added to a request within Answers and new objects that are added to a dashboard page. You do this by customizing the appropriate XML message files to override the default values distributed with Oracle BI Presentation Services.

Some of the default values you can customize are shown in the following list:

- Allowing the sorting of table columns in a dashboard.
- Adding a default page footer to new reports.
- Preventing the auto-previewing of results when working with a view.
- Specifying which views are contained in the compound layout view.
- Specifying which links to display with an embedded report in the dashboard.
- Allowing newly created dashboard sections to be collapsible.

## XML Message Files for View Defaults

This section describes the XML message files to customize to override the view defaults distributed with Oracle BI Presentation Services.

**NOTE:** For information about the core tasks required to customize XML message files, read [“Customizing the Oracle BI Presentation Services User Interface Using XML Message Files” on page 192](#).

For Answers, the file `answerstemplates.xml` includes a message named `kuiCriteriaDefaultViewElementsWrapper` from within `kuiAnswersReportPageEditorHead`. This message includes two additional messages, `kuiCriteriaDefaultViewElements`, in which you can define default values, and `kuiCriteriaDefaultViewElementsMask`, in which masks are defined.

**NOTE:** The mask XML message is protected and you cannot modify its contents.

The wrapper message adds the combined XML into a JavaScript variable, `kuiDefaultViewElementsXML`, that is used to apply the new default values.

For Dashboards, the file `dashboardtemplates.xml` includes a message named `kuiDashboardDefaultElementsWrapper` that adds XML into a JavaScript variable named `kuiDefaultDashboardElementsXML` for use within the dashboard editor.

## Examples of Customizing Answers and Dashboards Default Values

The following sections provide examples of customizing default values:

- [“Adding a Default Header or Footer to New Reports” on page 61](#)
- [“Allowing Sorting in Tables in Dashboards” on page 61](#)

- "Preventing Auto-Previewing of Results in Answers" on page 62
- "Setting Defaults for the Compound Layout View in Answers" on page 62
- "Changing Dashboards Section Defaults" on page 63
- "Including Refresh and Modify Links with Reports on Dashboards" on page 63
- "Specifying Dashboard Page Defaults Including Headers and Footers" on page 64

**NOTE:** For information about the core tasks required to customize XML message files, read "Customizing the Oracle BI Presentation Services User Interface Using XML Message Files" on page 192. The examples in this section assume you have read this information.

## Adding a Default Header or Footer to New Reports

You can specify to the system that default headers and footers appear on all new reports. Footers, for example, can contain messages such as a confidentiality notice, the company's name, and so on. You can specify a default header or footer by creating an XML message that specifies the text and formatting that should be applied, and then deploying it to Oracle BI Presentation Services.

The following XML code example creates a footer that contains the text "Acme Confidential" in bold, red letters.

```
<?xml version="1.0" encoding="utf-8"?>
<WebMessageTables xmlns:sawm="com.siebel.analytics.web.messageSystem">
  <WebMessageTable system="Answers" table="ViewDefaults">

    <WebMessage name="kuiCriteriaDefaultViewElements" translate="no"><HTML>
      <view signature="compoundView">
        <pageProps pageSize="a4">
          <pageFooter showOnDashboard="true" show="true">
            <zone type="top"><caption>[b]Acme Confidential [/b]</caption>
            <displayFormat fontColor="#FF0000"/></zone>
          </pageFooter>
        </pageProps>
      </view>
    </HTML></WebMessage>

  </WebMessageTable>
</WebMessageTables>
```

## Allowing Sorting in Tables in Dashboards

By default, Oracle Business Intelligence table views are not sortable within dashboards and result views. To make tables sortable, create an XML message that specifies the text and formatting that should be applied, and deploy it to Oracle BI Presentation Services. Then, when a new table view is created in Answers, the option to allow sorting in dashboards will be selected by default.

The following XML code example turns on the option to allow sorting.

```
<?xml version="1.0" encoding="utf-8"?>
<WebMessageTables xmlns:sawm="com.siebel.analytics.web.messageSystem">
  <WebMessageTable system="Answers" table="ViewDefaults">
```

```
<WebMessage name="kuiCriteriaDefaultViewElements" translate="no"><HTML>
  <view signature="tableView" sortable="true" />
</HTML></WebMessage>

</WebMessageTable>
</WebMessageTables>
```

## Preventing Auto-Previewing of Results in Answers

Oracle Business Intelligence displays the results of the request when editing most views within Answers. If you prefer that the user explicitly ask to view the results, you can create an XML message that specifies that auto-preview should be disabled when new views are created. The user can still click the display results link to view the results when editing a view.

The following XML code example disallows the auto-previewing of results when working with a view in Answers.

```
<?xml version="1.0" encoding="utf-8"?>
<WebMessageTables xmlns:sawm="com.siebel.analytics.web.messagesystem">
  <WebMessageTable system="Answers" table="ViewDefaults">

    <WebMessage name="kuiCriteriaDefaultViewElements" translate="no"><HTML>
      <view signature="tableView" showToolBar="true" showHeading="true" />
      <view signature="pivottableView" autoPreview="false" />
      <view signature="titleview" autoPreview="false" />
      <view signature="viewSelector" autoPreview="false" />
      <view signature="htmlviewnarrativeview" autoPreview="false" />
      <view signature="tickerview" autoPreview="false" />
      <view signature="htmlview" autoPreview="false" />
    </HTML></WebMessage>

  </WebMessageTable>
</WebMessageTables>
```

## Setting Defaults for the Compound Layout View in Answers

Answers displays the results of a newly formed request as a title view followed by a table view. You can create an XML message that specifies that the compound view should default to a different collection of views, such as a table view followed by a filters view. The user can still add and rearrange views within the compound layout view.

The following XML code example sets the default compound layout view to a table view followed by a filters view.

```
<?xml version="1.0" encoding="utf-8"?>
<WebMessageTables xmlns:sawm="com.siebel.analytics.web.messagesystem">
  <WebMessageTable system="Answers" table="ViewDefaults">

    <WebMessage name="kuiCriteriaDefaultViewElements" translate="no"><HTML>
      <view signature="compoundView">
        <cv signature="tableView" />
        <cv signature="filtersView" />
      </view>
    </HTML></WebMessage>

  </WebMessageTable>
</WebMessageTables>
```

```
</WebMessageTable>
</WebMessageTables>
```

## Changing Dashboards Section Defaults

By default, Oracle Business Intelligence displays the results of drilling in the dashboard on a new page, does not show section names in the dashboard, and does allow users to expand and collapse sections. You can change these default values by creating an XML message that specifies that new default values for the dashboard section.

The following XML code example makes section heads visible, enables drilling, and does not allow users to collapse the sections.

```
<?xml version="1.0" encoding="utf-8"?>
<WebMessageTables xmlns:sawm="com.siebel.analytics.web.messageSystem">
  <WebMessageTable system="Answers" table="ViewDefaults">

    <WebMessage name="kuiDashboardDefaultElements" translate="no"><HTML>
      <element signature="dashboardSection" drillInline="true" showHeading="true"
        collapsible="false" />
    </HTML></WebMessage>

  </WebMessageTable>
</WebMessageTables>
```

## Including Refresh and Modify Links with Reports on Dashboards

By default, Oracle Business Intelligence displays the results of embedded reports within the dashboard without including any links. If you prefer that newly added reports default to having Modify and Refresh links, for example, you can create an XML message that specifies that the report elements should behave this way. A user editing the dashboard can still modify this behavior using the menus within the dashboard editor.

In the XML message file, the links attribute can contain any combination of the letters d, f, g, m, and r to add the indicated link, as shown in [Table 10](#).

Table 10. Attribute Values for Adding Links to Embedded Reports

Attribute	Link Added to Report on the Dashboard
d	Download
f	Print
g	Add to Briefing Book
m	Modify
r	Refresh

The following XML code example adds Modify and Refresh links to new reports embedded in dashboards.

```
<?xml version="1.0" encoding="utf-8"?>
<WebMessageTables xmlns:sawm="com.siebel.analytics.web.messageSystem">
  <WebMessageTable system="Answers" table="ViewDefaults">

    <WebMessage name="kuiDashboardDefaultElements" translate="no"><HTML>
      <element signature="reportView" display="embed" links="mr" />
    </HTML></WebMessage>

  </WebMessageTable>
</WebMessageTables>
```

## Specifying Dashboard Page Defaults Including Headers and Footers

By default, Oracle Business Intelligence prints dashboards without headers or footers, and in a portrait orientation. If you prefer that newly added dashboard pages default to having a custom header and footer and print in landscape orientation, you can create an XML message that specifies these items. A user editing the dashboard can still modify this behavior using the menus within the dashboard editor.

The following XML code example adds a custom header and footer to a dashboard page and specifies landscape orientation.

```
<?xml version="1.0" encoding="utf-8"?>
<WebMessageTables xmlns:sawm="com.siebel.analytics.web.messageSystem">
  <WebMessageTable system="Answers" table="ViewDefaults">

    <WebMessage name="kuiDashboardDefaultElements" translate="no"><HTML>

      <element signature="dashboardPage" personalSelections="false">
        <pageProps orientation="landscape" printRows="all" pageSize="a4">
          <pageHeader showOnDashboard="true" show="true">
            <zone type="top"><caption>[b]Acme is Cool [/b]</caption>
              <displayFormat fontSize="9pt" hAlign="center"
fontColor="#FFFFFF" backgroundColor="#000000"/></zone>
            </pageHeader>
            <pageFooter showOnDashboard="true" show="true">
              <zone type="top"><caption>[b]CONFIDENTIAL
@{timeCreated[mm/dd/yy]}[/b]</caption>
              <displayFormat fontSize="7.5pt" hAlign="center"
fontColor="#999999" borderColor="#CC99CC" fontStyle="italic"
borderPosition="all" borderStyle="single"/></zone>
            </pageFooter>
          </pageProps>
        </element>
      </HTML></WebMessage>

    </WebMessageTable>
```



## Changing Alternating Bar Color

Both pivot tables and normal tables can have colored bars on alternating lines. The default color for these alternating bars is green. For Pivot tables, the Edit Format window has many advanced formatting controls, including one for the alternating bar color. If you need to change the default color in tables, you can make an edit in a style configuration file.

To change the color, edit the views.css file in the b\_mozilla\_4 folder. Locate this text:

```
TABLE.ResultTable.TD.ECell
{
background-color: #DDF2DD;
```

Change the six-digit hexadecimal color value to a new color value.

The control for turning on the alternating text is in the Edit View window. It has a check box labelled: Enable alternating row "Green bar" styling. If you have changed the color of the bars, you may also want to change the label to indicate the color you are now using.

To change the label text, open the tableviewmessages.xml file and find this entry:

```
WebMessageName = "kmsgTableViewEnableGreenbarReporting"
```

Copy the entry and the text line below it to a custom messages file in the custom messages folder, and change the text line appropriately. For example:

```
WebMessageName = "kmsgTableViewEnableGreenbarReporting"
<TEXT>Enable alternating row "RED bar" styling</TEXT>
```

For more information on custom messages, read ["Customizing the Oracle BI Presentation Services User Interface Using XML Message Files" on page 192](#).



# 4

## Administering Oracle BI Delivers

This chapter describes procedures used to administer Oracle BI Delivers. For information about using Delivers, read *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.

This chapter contains the following topics:

- [About Delivers iBots and Impersonation on page 67](#)
- [About Delivers iBots and AntiVirus Software on page 68](#)
- [Viewing Entries in the Delivers iBot Log Directory on page 68](#)
- [Disabling Delivers on page 69](#)
- [Specifying the Machine Running Oracle BI Scheduler on page 70](#)
- [Changing the Directory in Which Delivers iBot Deliveries Are Stored on page 70](#)
- [Integrating Delivers with Oracle's Siebel Workflow on page 71](#)
- [Using Delivers to Seed the Oracle BI Server Cache on page 71](#)
- [About Permission Settings for Delivers and iBots on page 71](#)
- [Managing Device Types for Delivers on page 72](#)
- [About the SA System Subject Area and Scheduling iBot Deliveries on page 73](#)
- [Setting the Case of Logon Names for the SA System Subject Areal on page 74](#)
- [Controlling Delivery Options for iBots on page 74](#)
- [Viewing Information About Active Delivers iBot Sessions on page 76](#)

### About Delivers iBots and Impersonation

Delivers makes use of intelligence agents or Bots (called iBots). iBots are software-based agents driven by schedule or events that access, filter, and perform analytics on data based upon defined criteria. Users receive information from iBots in the form of alerts that appear on their designated delivery devices or dashboards.

To create an iBot, Oracle Business Intelligence administrators and users use Delivers to define the actions the iBot is to perform. Oracle BI Presentation Services gathers information about the priority, delivery devices, user, and other characteristics; packages that information into a job; and tells Oracle BI Scheduler when it wants the job to execute.

Because Oracle BI Scheduler runs these jobs on behalf of users without accessing or storing their passwords, Oracle BI Server permits the Scheduler and Oracle BI Presentation Services to impersonate users. This is done by configuring the Scheduler to use a user ID and password with administrator privileges that can act on behalf of other users. An iBot logs on to the system using this user ID and password, and then the Scheduler executes the job on behalf of the user.

**NOTE:** If Oracle BI Server is configured to authenticate users through database logons, then impersonation is not permitted. Delivers works with database authentication provided that only the initialization block set up for authentication in the Oracle Business Intelligence Administration Tool uses a connection pool with pass-through authentication. That connection pool cannot be used for any other initialization block or request.

For information about user authentication options, read *Oracle Business Intelligence Server Administration Guide*. For information about Oracle BI Scheduler, read *Oracle Business Intelligence Scheduler Guide*.

## About Delivers iBots and AntiVirus Software

Some antivirus software programs, such as Norton AntiVirus, enable a script-blocking feature, which tries to block all calls made by scripts to system objects (such as the Windows file system object) that the antivirus software deems unsafe.

If you launch a script as part of post-iBot processing, this antivirus feature may cause unexpected results. If you are running antivirus software with a script-blocking feature on the machine where Oracle BI Scheduler is installed, you should disable the script-blocking feature to prevent the software from unexpectedly blocking iBot script calls.

## Viewing Entries in the Delivers iBot Log Directory

If an iBot fails to execute fully or if debugging is turned on in Oracle BI Scheduler, a log file is generated for the iBot.

The location for iBot log files is specified on the iBots tab of the Job Manager Configuration dialog box in Oracle BI Scheduler. The default location is the Log directory in the Oracle Business Intelligence installation directory on the machine where Scheduler is installed.

The log file name has the following format:

NQiBot-JobID-InstanceID.xxx

where:

NQiBot	The preface for all iBot log files.
JobID	The Scheduler job ID for the iBot.
InstanceID	The Scheduler instance ID for the iBot.

xxx

The file extension:

■ .err for iBot error log files.

■ .log for debug log files.

The iBot error and debug log files are written as separate files for each iBot instance that fails to execute. You can use a text editor to view the files. Entries are generally self-explanatory. Exit codes are generic and do not indicate any particular condition.

The presence of an error log does not necessarily mean that an iBot failed completely. For example, suppose an iBot delivers content to multiple email addresses. If some of the addresses are invalid or the mail server is down, an error log is generated for the iBot.

For more information about the Oracle BI Scheduler, read *Oracle Business Intelligence Scheduler Guide*.

## Disabling Delivers

Delivers is an optional component of Oracle BI Presentation Services that is enabled by default for organizations that have purchased the appropriate license. To disable Delivers, you can edit the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the following entry. The default value is Yes (Delivers is enabled). To disable Delivers, set this to No.

You place your entry between the <Alerts> and </Alerts> elements.

The following entry is an example:

```
<Al erts>
  <Enabl ed>No</Enabl ed>
</Al erts>
```

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read ["Making Oracle BI Presentation Services Configuration Changes" on page 15](#).

## Specifying the Machine Running Oracle BI Scheduler

You can identify the machine on which Oracle BI Scheduler is running by editing the Oracle BI Presentation Services configuration file (instanceconfig.xml) to edit the ScheduleServer entry. By default, if Oracle BI Scheduler is running on the local machine, then this entry is populated with the name of the local machine. If the Oracle BI Scheduler is not running on standard port 9705, then you need to specify the value for the ScheduleServer entry in the form IP\_ADDRESS:PORT\_NUMBER.

The following entry is an example:

```
<Alerts>
  <ScheduleServer>Server02</ScheduleServer>
</Alerts>
```

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

For more information about how the ScheduleServer element is set, see the *Oracle Business Intelligence Infrastructure Installation and Configuration Guide* and the *Oracle Business Intelligence Enterprise Edition Deployment Guide*.

**NOTE:** If you are migrating an Oracle Business Intelligence environment to a new system, then ensure that you also migrate the Oracle Business Intelligence repository file and the Scheduler tables. The Scheduler tables are required for iBots.

## Changing the Directory in Which Delivers iBot Deliveries Are Stored

You can specify the directory in which iBot deliveries are stored by editing the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the following entry. The deliveries directory is, by default, stored in the same location as the Presentation Catalog. (The value described in [“Changing the Name and Location of the Presentation Catalog” on page 96](#) defines where the Presentation Catalog is stored.) At startup, Oracle BI Presentation Services attempts to create the deliveries directory.

You need to create the elements <Web> and </Web> after the <ServerInstance> element, and place your entries between the <Web> and </Web> elements.

The following entry is an example:

```
<PersistentStorageDirectory>/usr/local/oracleBI/Data/web/catalog/TestDelivery</PersistentStorageDirectory>
```

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

## Integrating Delivers with Oracle's Siebel Workflow

You can use the Advanced tab in Delivers to set up iBots to trigger workflows in Oracle's Siebel Workflow application. The procedures to configure this capability are given in *Oracle Business Intelligence Scheduler Guide*.

By default, only Oracle Business Intelligence administrators have the necessary privileges to set up iBots to trigger workflows.

For information about the Advanced tab in Delivers, read *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.

## Using Delivers to Seed the Oracle BI Server Cache

You can use the Destinations tab in Delivers to set up iBots to seed the Oracle BI Server cache. Seeding the cache can improve response times for users when they run requests in Answers or view requests that are embedded on their dashboards. Do this by scheduling iBots to execute requests that refresh this data.

For more information about Oracle BI Server cache, read *Oracle Business Intelligence Server Administration Guide*.

For information about the Destinations tab in Delivers, read *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.

## About Permission Settings for Delivers and iBots

The permission settings for Delivers and iBots are available in the Delivers section on the Privilege Administration screen in Oracle BI Presentation Services Administration.

In addition, if you want to allow users who are granted access to the Publish iBots for subscription privilege to change or delete an iBot, you need to grant them the Change/Delete permission to the shared iBots object and child objects in the Oracle BI Presentation Catalog.

You can grant the Change/Delete permission by using the Manage Catalog feature. For information about using the Manage Catalog feature, read ["Administering Items in the Presentation Catalog" on page 110](#).

## Managing Device Types for Delivers

Delivers makes use of different device types from such device categories as mobile phones and pagers to deliver the content of iBots to users. You can view, create, edit, and delete device types for a device category supported by Delivers.

**NOTE:** You can only view system-seeded device types (such as AT&T Wireless); you cannot edit or delete them.

The capability to manage device types is available to users who have the Manage Device Types privilege. By default, this privilege is granted to Oracle Business Intelligence administrators. For more information on setting privileges, see [“Setting Privileges in Oracle BI Presentation Services Administration” on page 152](#).

### *To view a device type*

- 1 Log in to Oracle BI Presentation Services.
- 2 Choose Settings > Administration.
- 3 Click the Manage Device Types link.
- 4 Click the View icon (or the Edit icon for user-created devices) for the device type that you want to view.

### *To create a device type*

- 1 Log in to Oracle BI Presentation Services.
- 2 Choose Settings > Administration.
- 3 Click the Manage Device Types link.
- 4 Click the Create New Device Type link.
- 5 Enter a name in the Device Type Name field.
- 6 Select the appropriate category for the device type from the Category drop-down list.
- 7 Enter the details for the device type in the Domain field.  
For example, the email extension of the service provider (e.g. pagenet.net).
- 8 Do not clear the Buffer Size check box unless you have a specific buffer size that you want to specify.
- 9 Click Create Device Type to return to the Manage Device Types screen.

The device appears in the Device Type Name list.

On creation, this device type will be available for selection (in the Device / Provider drop-down list) when users configure delivery options. For more information, see *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.



### *To edit a device type*

- 1 Log in to Oracle BI Presentation Services.
- 2 Choose Settings > Administration.
- 3 Click the Manage Device Types link.
- 4 Click the Edit icon for the device type that you want to edit.
- 5 Update the details as required.
- 6 Click Update Device Type to return to the Manage Device Types screen.

### *To delete a device type*

- 1 Log in to Oracle BI Presentation Services.
- 2 Choose Settings > Administration.
- 3 Click the Manage Device Types link.
- 4 Click the Delete icon for the device type that you want to delete.  
The Confirm Device Type Deletion screen appears.
- 5 Click Yes to confirm the deletion and to return to the Manage Device Types screen.

## About the SA System Subject Area and Scheduling iBot Deliveries

This section applies only to organizations using Oracle's Siebel operational applications.

When the SA System subject area is being used, iBot deliveries cannot be made to user IDs that are defined only in the Oracle Business Intelligence repository. Such internally defined user IDs include the Administrator user ID.

The SA System subject must return rows for any acceptable user of Oracle Business Intelligence. In all Oracle's Siebel operational applications, the Administrator user ID is not defined in the Siebel OLTP, and therefore is not returned from queries to the SA System subject area. You should test alerts with a valid Siebel OLTP user.

For more information about the SA System subject area, see *Oracle Business Intelligence Server Administration Guide*.

## Setting the Case of Logon Names for the SA System Subject Area

When the SA System subject area is used, logon names are compared to the Logon column in the SA System subject area. By default, this comparison is case sensitive. This means, for example, that a login of "Fred" will not match an SA System subject area entry of "fred." If your authentication method is case sensitive, this works fine because the login "fred," accepted at login, matches "fred" in the Logon column in the SA System subject area. However, if your authentication method is case insensitive, then you need the SA System subject area comparison also to be case insensitive.

You can make the SA System subject area comparison case insensitive by:

- Ensuring that your SA System subject area stores all logon names in uppercase
- Setting the `UpperCaseRecipientNames` element to true so that logon names are converted to uppercase before being included in SA System subject area queries

To set the `UpperCaseRecipientNames` element to true, you edit the Oracle BI Presentation Services configuration file (`instanceconfig.xml`) to add the `UpperCaseRecipientNames` element between the `<Alerts>` and `</Alerts>` elements (which appear after the `<ServerInstance>` element) and set it to true.

The following entry is an example:

```
<ServerInstance>
. . . . .
  <Alerts>
    . . . . .
    <UpperCaseRecipientNames>true</UpperCaseRecipientNames>
    . . . . .
  </Alerts>
. . . . .
</ServerInstance>
```

For information about working in the Oracle BI Presentation Services configuration file (`instanceconfig.xml`), read ["Making Oracle BI Presentation Services Configuration Changes" on page 15](#).

## Controlling Delivery Options for iBots

Delivery options (that is, delivery devices and delivery profiles) determine how the content of iBots gets delivered to users. Delivery options can be configured in the SA System subject area or by users. (For more information about the SA System subject area, see the *Oracle Business Intelligence Server Administration Guide*.)

You can control the availability of the delivery options configured in the SA System subject area and the user-defined delivery options by adding the following elements to the Oracle BI Presentation Services configuration file (instanceconfig.xml):

Element	Description
SystemSubjectArea  <b>NOTE:</b> These elements are placed after the <ServerInstance> element in the instanceconfig.xml file.	Specifies whether to recognize the delivery devices and deliver profiles configured in the SA System subject area:  <ul style="list-style-type: none"> <li>■ <b>True.</b> Recognizes the delivery devices and delivery profiles configured in the SA System subject area and displays them on the My Account screen.</li> <li>■ <b>False.</b> Ignores the delivery devices and deliver profiles configured in the SA System subject area and does not display them on the My Account screen.</li> </ul> The default is True.
IgnoreWebcatDeliveryProfiles  <b>NOTE:</b> These elements are placed after the <ServerInstance> element in the instanceconfig.xml file and between the <Alerts> </Alerts> elements.	Specifies whether to ignore user-defined delivery devices and deliver profiles:  <ul style="list-style-type: none"> <li>■ <b>True.</b> Ignores the user-defined delivery devices and deliver profiles and does not display them on the My Account screen. (This means that users will not be able to create new delivery devices and delivery profiles.)</li> <li>■ <b>False.</b> Recognizes the user-defined delivery devices and delivery profiles and displays them on the My Account screen.</li> </ul> The default is False.

**NOTE:** The SystemSubjectArea and IgnoreWebcatDeliveryProfiles elements take effect only if the SA System subject area is being used.

The following entry is an example:

```
<ServerInstance>
  <SystemSubjectArea>false</SystemSubjectArea>
  <Alerts>
    <IgnoreWebcatDeliveryProfiles>false</IgnoreWebcatDeliveryProfiles>
  </Alerts>
</ServerInstance>
```

## Viewing Information About Active Delivers iBot Sessions

Using the iBot Session Management screen in Oracle BI Presentation Services Administration, you can view the following information about currently active iBot sessions triggered by Oracle BI Scheduler:

- A list of active iBots per session
- The recipients for each active iBot

When one or more iBot sessions are active, information about each iBot session appears, such as the Job ID and the Instance ID assigned to the iBot session by the Scheduler. Clicking the link in the Primary iBot column for an iBot session opens a popup window and navigates to the iBot session's definition in Delivers.

Expanding the iBot session shows the individual iBots (one iBot, or multiple iBots if they are chained). The state of the iBot is one of the following:

- Created
- Populated
- Conditional Request Resolved

Expanding a specific iBot in a particular session shows the recipients for the iBot and their type, such as the Engineering recipients defined in a group, or individual users. When the recipient is a group, the individual members of the group are not listed. Clicking the link in the Path column for an individual iBot opens a popup window and navigates to the iBot's definition in Delivers.

**NOTE:** When iBots are chained, the recipient list is dependent upon the parent iBot. The recipients are shown for the parent iBot definition only, and not for the actual execution of chained iBots.

### *To access the iBot Session Management screen*

- 1 Log in to Oracle BI Presentation Services.
- 2 Choose Settings > Administration.
- 3 Click the Manage iBot Sessions link.

### *To view information about active iBot sessions*

- 1 To sort iBot sessions by their values in a particular column, click the sort button for that column.
- 2 To view more information about an iBot session, click the expand button.
- 3 To view more information about iBots within a particular session, click the expand button.
- 4 To view the definition of an iBot session or an individual iBot in Delivers, click the link for the session or iBot.

# 5

## Administering Oracle BI Dashboards

End users with appropriate privileges can modify personal and shared Dashboards, including the addition of pages and content. End users cannot create dashboards.

You can create and manage dashboards, using the procedures in this chapter. For an introduction to dashboards and end-user procedures for modifying them, read *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide* and *Oracle Business Intelligence Presentation Services Online Help*.

This chapter contains the following topics:

- [About Managing Dashboards on page 77](#)
- [Managing Dashboards on page 78](#)
- [Creating Dashboards Action Links on page 79](#)
- [Setting the Number of Dashboards Names to Appear on a Screen on page 81](#)
- [Controlling Access to Saved Selection Options in Dashboards on page 82](#)
- [Setting the Number of Oracle Business Intelligence Briefing Book Links to Follow on page 87](#)
- [Downloading Oracle Business Intelligence Results in Non-UNICODE Format on page 87](#)
- [Integrating Answers into Other Portals or Intranets on page 88](#)
- [Configuring Report Write Back on page 90](#)

**NOTE:** For information about specifying view defaults for dashboards, read [“Specifying View Defaults for Answers and Dashboards Users” on page 60](#).

### About Managing Dashboards

Before you create shared dashboards, make sure you have planned your Presentation Catalog directory or folder structure and security strategy. Guidelines for creating a shared dashboard, within the broader context of Presentation Catalog structure and security framework, are given in [“Guidelines for Configuring Oracle BI Presentation Services Security for the Presentation Catalog and Dashboards” on page 161](#).

For more information about shared folder structures in the Presentation Catalog read [Chapter 6, “Administering the Oracle BI Presentation Catalog.”](#)

For more information about permissions, read [Chapter 8, “Managing Oracle BI Presentation Services Security.”](#)

Overall, to create a shared dashboard, you first create the dashboard and then add content using the Dashboard Editor. You can also assign Presentation Services group permissions to access the dashboard. Users who are members of more than one Presentation Services group can select the dashboard they display by default from all of the dashboards to which they have permissions.

You can also authorize users to act for others, which allows them to access the other users' dashboards. For more information, see [“About Authorizing Users to Act for Others” on page 167](#).

This section describes, from an administrator's perspective, how to create and delete dashboards, and add sections. For more information about adding pages, sections, and content from an end-user's perspective, read *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.

## Managing Dashboards

Using the Manage Dashboards screen in Oracle BI Presentation Services Administration, you can:

- Access the Create Dashboard screen to create a new dashboard
- Access the Dashboard Properties screen to change the properties of a dashboard
- Access the Change Item Permissions screen to change the permissions for a dashboard
- Delete a dashboard

### *To access the Manage Dashboards screen*

- 1 Log in to Oracle BI Presentation Services.
- 2 Choose Settings > Administration.
- 3 Click the Manage Interactive Dashboards link.

### *To access the Create Dashboard screen and create a new dashboard*

- 1 Click the Create Dashboard button to display the Create Dashboard screen.
- 2 Specify entries for the following fields:
  - a From the drop-down list, select the appropriate Group Folder.  
The members of this Presentation Services group (and other groups and users with appropriate permissions) will have Read access to the shared dashboard.
  - b In the Dashboard Name field, type a name for the dashboard.
  - c In the Dashboard Builder field, type the name of the user or Presentation Services group that can make changes to the dashboard.
- 3 Click Finished to return to the Manage Dashboards screen.
- 4 Click Finished.
- 5 Click Close Window.
- 6 In Answers, click the Dashboards tab in the selection pane, and then click the Refresh Display link near the bottom of the selection pane.

The newly created dashboard appears in the list of dashboards.

- 7 In Dashboards, navigate to the dashboard and click Page Options > Edit Dashboard.

The Dashboard Editor screen opens, where you can add content to the dashboard. For information, see the *Oracle Business Intelligence Presentation Services Online Help*.

#### **To access the Dashboard Properties screen**

- Locate the dashboard whose properties you want to change and click the associated Properties icon. For information on how to change dashboard properties, see the *Oracle Business Intelligence Presentation Services Online Help*.

#### **To access the Change Item Permissions screen**

- Locate the dashboard whose permissions you want to change and click the associated Permissions icon. For information on how to change permissions, see the *Oracle Business Intelligence Presentation Services Online Help*.

#### **To delete a dashboard**

- 1 Locate the dashboard that you want to delete and click the associated Delete icon.

The Confirm Deletion screen appears.

- 2 Click Yes.
- 3 Click Finished.

## Creating Dashboards Action Links

To provide a link for end users to navigate from their dashboards to a record in a Siebel operational application, use an action link. Oracle Business Intelligence applications contain prebuilt action links in requests and dashboards. For example, a user can drill down directly from an Oracle Sales Analytics dashboard to a specific record in an Oracle's Siebel Sales view. Drilldown is based on the row identifier column contained in a request.

**NOTE:** End users must have the appropriate permissions and responsibilities to access the view, and any drilldown links. Also, the host name for the Web server (or Virtual IP) serving content from the Siebel application server must match that for Oracle BI Presentation Services, because the JavaScript Security model prevents a script on one server from affecting another.

When running the Oracle Business Intelligence infrastructure, there is no connection to a Siebel operational application. Therefore, you cannot create a new action link nor access a predefined action link. The Action Links command in the Navigate drop-down menu is visible only when the user is logged into the integrated application.

If a request is added to a dashboard as a link and set to open in a new window, then action links contained in that request will no longer navigate to the Siebel operation application.

**To create an action link**

- 1** Identify the target Siebel operational application view.
- 2** Select the Siebel operational application view or applet that to drill down to, and select Help > About View.  
  
A pop-up window shows the names of the view and applet. Note the view and list applet names. You need these names in [Step 7](#).
- 3** Using a Subject Area that is appropriate for the target applet, use Answers to create a new Oracle Business Intelligence request with the row identifier column in it, for example, Account\_Row\_ID.
- 4** Click the Properties button for the column.  
  
The Column Properties dialog appears.
- 5** Click the Column Format tab.
- 6** In the Value Interaction field, set the Type drop-down menu to Action Link.
- 7** Fill in the fields using the following table as a guide.

Field Name	Description
View	Enter the name of the view as determined in <a href="#">Step 2</a> .
Applet	Enter the name of the applet as determined in <a href="#">Step 2</a> .
Show Action Link Icon	Select this check box to include Action Link icons in the resulting report.
Pass value from	Set this drop-down menu to the ROW_ID field in your query.  In <a href="#">Step 4</a> , if you had clicked the Column Properties button on the ROW_ID field, then choose This Column from the drop-down menu. If you had clicked the Column Properties button on a different field, then choose ROW_ID instead.

- 8** Click OK, and then view the request on the dashboard.

After the request is saved and placed on a dashboard, the row identifier column contains an action link to the Siebel operational application.



## Setting the Number of Dashboards Names to Appear on a Screen

Oracle Business Intelligence typically displays the names of individual dashboards across the top of the screen. To minimize the amount of screen space used for this, when there are more than 15 dashboard names to display, Oracle Business Intelligence creates a drop-down list from which users can choose the dashboard to view. A drop-down list shows individual dashboards as grouped under the name of the folder that contains them, and replaces the dashboard names at the top of the screen with that folder name. Together with the entry described in this section, you can create and manipulate folders containing dashboards within the Presentation Catalog to create the desired dashboard presentation.

You can change the number of dashboard names to show before a drop-down list appears by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the following entry. The minimum value is 1.

**NOTE:** This entry takes effect for all folders that contain dashboards if any folder contains more than the value you specify. For example, if dashboard folder A contains 8 dashboards and dashboard folder B contains 11 dashboards, and you specify a value of 10, drop-down lists will appear for both folders.

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read ["Making Oracle BI Presentation Services Configuration Changes" on page 15](#).

The following entry is an example:

```
<DashboardMaxBeforeMenu>10</DashboardMaxBeforeMenu>
```

# Controlling Access to Saved Selection Options in Dashboards

This section provides an overview of saved selections and information about administering saved selections. It contains the following topics:

- [“Overview of Saved Selections in Dashboards” on page 82](#)
- [“Administering Saved Selections” on page 82](#)
- [“Table of Permission and Privilege Settings for Creating Saved Selections” on page 85](#)
- [“Example Usage Scenario for Saved Selection Administration” on page 86](#)

## Overview of Saved Selections in Dashboards

In Dashboards, saved selections allow users to view dashboard pages with their most frequently used or favorite choices for filters and prompts, without the need to make choices manually for all of the prompts and filters that appear on the dashboard page.

Users and groups with the appropriate permissions and dashboard access rights can perform the following activities:

- Save various combinations of choices for filters and prompts as saved selections, for their personal use or use by others.
- Specify a saved selection as the default selection for a dashboard page, for their personal use or use by others.
- Switch between their saved selections.

You can restrict this behavior in the following ways:

- Users can view only the saved selections assigned to them.
- Users can save selections for personal use only.
- Users can save selections for personal use and for use by others.

**NOTE:** For information about end user use of saved selections, read the section about creating and assigning personal and shared saved selections for a dashboard page in *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.

## Administering Saved Selections

This section describes the privileges and permissions required to administer saved selections. It also describes the relevant portions of the Presentation Catalog related to storing and administering saved selections.

## Privileges for Saved Selections

In Oracle BI Presentation Services Administration, the following privileges in the Dashboards area, together with permission settings for key dashboard elements, control whether users or groups can save or assign selections:

- Save Selections
- Assign Default Selections

You can set neither privilege, one privilege, or both privileges for a user or group, depending on the level of access desired. For example, a user who has neither privilege can view only the saved selection assigned as his or her default selection.

## Permissions for Saved Selections

This section describes the permissions required for dashboard pages to administer saved selections, and the relevant portions of the Presentation Catalog structure for setting permissions on shared and personal saved selections.

### Assigning Permissions to Dashboards

Permissions for dashboards, such as Read or Change/Delete, are set at the Manage Dashboards screen, available by clicking the link Manage Interactive Dashboards at the Oracle Business Intelligence Administration screen. The pages on the dashboard inherit the permissions set for a user or group.

### Assigning Permissions for Saved Selections on a Dashboard Page

Permissions for assigning saved selections on a particular dashboard page are set at the Dashboard Properties screen, available by clicking the Dashboard Properties button in the Dashboard Editor.

When selection security is enabled at the Dashboard Properties screen by clicking the Enabled link, two buttons appear in the Selection Security column:

- The left button controls who can save shared selections for that dashboard page.
- The right button controls who can assign default selections for that dashboard page.

Clicking each button navigates to the appropriate location in the Presentation Catalog for that object. Presentation Catalog objects and permissions scenarios are described in more detail in the sections that follow.

### Presentation Catalog Folder Structure for Saved Selections

In addition to the privileges set in Oracle Business Intelligence Administration, the level of control that users and groups have over saved selections depends on their access rights to key elements. For example, users and groups that can create and edit underlying dashboards, save dashboard view preferences as selections, and assign selections to other users as default selections require Full Control permission to the key elements in shared storage, while users and groups that can view only their assigned default saved selections need only Read access to the key elements in shared storage.

Key elements in the Presentation Catalog include the following folders:

### ■ Shared Storage Folders.

Shared storage folders for dashboards are located within the `_portal` folder. Dashboards are identified by their assigned names.

Permission settings control access to a specific dashboard for editing. Typically, if permissions are inherited down to the `_selections` and `_defaults` folders, users who can edit dashboards are also able to save selections and set defaults. Access to a specific dashboard folder controls whether a user or group can edit the dashboard.

The `_selections` folder within a dashboard folder contains a page identifier folder for each dashboard page. Shared saved selections are located within this folder. Access to the page identifier folder controls whether a user or group can display, save or edit selections for that page.

The `_defaults` folder within a `_selections` folder contains assigned default selections. Each group that has an assigned default appears here. Access to this folder controls whether a user or group can assign defaults.

### ■ Personal Storage Folders.

Within a user's personal folder, the `_selections` folder contains an individual user's saved selections. Like the shared `_selections` folder, a personal `_selections` folder contains a page identifier folder for each dashboard page. The page identifier folder contains personal saved selections and a `_defaultlink` file that specifies a user's preference for the personal defaulted selection.

A personal saved selection default overrides an assigned shared selection default.

**NOTE:** If a dashboard page with saved selections is removed from the system, the saved selections are also removed from the Presentation Catalog. If the underlying dashboard structure changes such that a saved selection is no longer valid when a user accesses it, the default content appears on the dashboard.

## Table of Permission and Privilege Settings for Creating Saved Selections

Table 11 describes typical user roles and specific permission settings that can be granted to users for creating saved selections. The folder names listed in the Permission and Privilege Settings column are described in the preceding section.

Table 11. User Roles and Permission Settings for Saved Selections

User Role	Permission and Privilege Settings
<p>Power users such as IT users who need to perform the following tasks:</p> <ul style="list-style-type: none"> <li>■ Create and edit underlying dashboards.</li> <li>■ Save dashboard view preferences as selections.</li> <li>■ Assign selections to other users as default selections.</li> </ul>	<p>In the Shared section of the Presentation Catalog, requires Full Control permission to the following folders:</p> <ul style="list-style-type: none"> <li>■ dashboard_name.</li> <li>■ _selections.</li> <li>■ _defaults.</li> </ul> <p>Typically, no additional privileges need to be assigned.</p>
<p>Technical users such as managers who need to perform the following tasks:</p> <ul style="list-style-type: none"> <li>■ Save selections as selections for personal use.</li> <li>■ Save selections for use by others.</li> </ul> <p>Users cannot create or edit underlying dashboards, or assign view selections to others as default selections.</p>	<p>In the Shared section of the Presentation Catalog, requires Read permission to the following folders:</p> <ul style="list-style-type: none"> <li>■ dashboard_name.</li> </ul> <p>In the Shared section of the Presentation Catalog, requires Write permission to the following folders:</p> <ul style="list-style-type: none"> <li>■ _selections.</li> <li>■ _defaults.</li> </ul> <p>Typically, no additional privileges need to be assigned.</p>

Table 11. User Roles and Permission Settings for Saved Selections

User Role	Permission and Privilege Settings
Everyday users who need to save selections for personal use only.	<p>In Oracle BI Presentation Services Administration, requires the following privilege to be set:</p> <ul style="list-style-type: none"> <li>■ Save Selections.</li> </ul> <p>In the dashboard page, requires that the following option is set:</p> <ul style="list-style-type: none"> <li>■ Allow Saved Selections.</li> </ul> <p>In the Presentation Catalog, no additional permission settings are typically required.</p>
Casual users who need to view only their assigned default selection.	<p>In the Shared section of the Presentation Catalog, the user needs Read permission to the following folders:</p> <ul style="list-style-type: none"> <li>■ dashboard_name.</li> <li>■ _selections.</li> <li>■ _defaults.</li> </ul> <p>In the Presentation Catalog, no additional permission settings are typically required.</p>

## Example Usage Scenario for Saved Selection Administration

Depending on privileges set and permissions granted, you can achieve various combinations of user and group rights for creating, assigning, and using saved selections.

For example, suppose a group of power users cannot change dashboards in a production environment but are allowed to create saved selections and assign them to other users as default selections. The following permission settings for the group are required:

- Read access to the dashboard, using the Manage Dashboards screen.
- Change/Delete access to the \_selections and \_defaults subfolders within the dashboard folder in the Presentation Catalog, assigned using the Dashboard Properties screen accessible from the Dashboard Editor.

## Setting the Number of Oracle Business Intelligence Briefing Book Links to Follow

A Briefing Book navigation link is a special type of link that can be added to a dashboard using the Dashboard Editor. The default value for the maximum number of links to follow is 5.

You can change the default by modifying the Oracle BI Presentation Services configuration file (instanceconfig.xml) to add the following entry. The minimum value is 1. The maximum value is 10.

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

The following entry is an example:

```
<MaxFollowLinks>10</MaxFollowLinks>
```

## Downloading Oracle Business Intelligence Results in Non-UNICODE Format

Oracle Business Intelligence provides options for downloading results that appear in Answers as options for the Download link. The Download link can also appear with a request in a dashboard.

By default, the Download Data option downloads results in a UNICODE, tab-separated text file. For organizations that require a non-UNICODE, comma-separated file for use with certain applications, you can override behavior of the Download Data option or add another download option by modifying the message kmsgEVCDownloadLinks in the XML messages file viewscontrolmessages.xml.

If you change the behavior of the Download Data option or add a new option that retrieves comma-separated data, the entry in the Oracle BI Presentation Services configuration file (instanceconfig.xml) described in this section is used to determine the character set to use. You can view supported character sets by examining the message file characterdefinitions.xml located in the SADATADIR\web\config directory, where SADATADIR is the data directory.

For example, adding the following XML code to the message kmsgEVCDownloadLinks in the file viewscontrolmessages.xml file adds the option Download CSV to the Download link:

```
<a class="NQWMenuItem" name="SectionElements"
href="javascript: void(null);" onclick="NQWClientActiveMenu();
Download('@{command}&Format=csv&Extension=.csv')">Download CSV</a>
```

The Download CSV option downloads a comma-separated file that uses the following entry to determine the character set.

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

The following entry is an example:

```
<CSVCharset>us-ascii</CSVCharset>
```

For information about making changes to the XML messages files, read [“Customizing the Oracle BI Presentation Services User Interface Using XML Message Files” on page 192](#).

## Integrating Answers into Other Portals or Intranets

The following customization settings are available for integrating Answers into other portals and intranets without requiring the use of Dashboards. These settings are configured in the XML message files.

You can perform the following actions:

- Change the text of the Dashboards link.
- Change the URL to which users are directed when they click that link.

**NOTE:** Make sure that you first review the information in [“Customizing the Oracle BI Presentation Services User Interface Using XML Message Files” on page 192](#) before making any integration changes.

### *To change the text of the dashboards link*

- 1 Navigate to the file uimessages.xml.

This file is located in the folder SAROOTDIR\web\msgdb\l\_xx\messages, where SAROOTDIR is the installation directory, where xx is the language identifier of the selected locale.

**CAUTION:** Always make a backup copy of the file uimessages.xml before you make any changes.

- 2 Use a text editor to open the file uimessages.xml.
- 3 Locate the message “kmsgUIPortal.”

The message has the following form:

```
<WebMessage name="kmsgUI Portal ">
  <TEXT>Dashboards</TEXT>
</WebMessage>
```

The default text is Dashboards.

- 4 Change the default text to text of your choosing.

For example, to change the text to be your company’s intranet, you might change it to the following:

```
<WebMessage name="kmsgUI Portal ">
  <TEXT>Intranet</TEXT>
```



```
</WebMessage>
```

- 5 Save the file when you are done.

Your changes take effect when the service for Oracle BI Presentation Services is restarted.

### *To change the destination of the dashboards link*

- 1 Navigate to the file controlmessages.xml.

This file is located in the folder SAROOTDIR\web\msgdb\l\_xx\messages, where SAROOTDIR is the installation directory and where xx is the language identifier of the selected locale.

**CAUTION:** Always make a backup copy of the file ControlMessages.xml before you make any changes.

- 2 Use a text editor to open the file ControlMessages.xml.
- 3 Locate the message "kmsgPortalLink."

The message has the following form:

```
<WebMessage name="kmsgPortal Link">
  <HTML>
    <A insert="1">
      <MessageRef name="kmsgUI Portal " />
    </A>
  </HTML>
</WebMessage>
```

The default location is Dashboards (indicated by the reference to insert="1", which is an internal reference).

- 4 Change the default location to a location of your choosing.

**NOTE:** If no location is specified, no link appears in Answers.

For example, to change this to your company's intranet, you can include the appropriate attributes and change it to point to that location instead:

```
<WebMessage name="kmsgPortal Link">
  <HTML>
    <A href="http://intranet" target="_top" title="Click here for your intranet">
      <MessageRef name="kmsgUI Portal " />
    </A>
  </HTML>
</WebMessage>
```

- 5 Save the file when you are done.

Your changes take effect when the service for Oracle BI Presentation Services is restarted.

For more information about controlling the default appearance and behavior of the Oracle BI Presentation Services user interface, read [“Customizing the Oracle BI Presentation Services User Interface Using XML Message Files” on page 192](#).

## Configuring Report Write Back

Write Back is the ability to enter values directly into a report and have those values used in calculations and charts in the report. For example, a report can have Sales Quota Amount defined as a write back field, Sales Amount as a field from the data warehouse, and Percentage of Quota as a calculated field (Sales Amount/Sales Quota Amount). When viewing the report you can change the Sales Quota Amount and the Percentage of Quota field recalculates appropriately.

The following topics describe the write back feature:

- [Write Back Configuration Tasks on page 90](#)
- [How Write Back Works on page 91](#)
- [Creating a Write Back Template on page 92](#)
- [Example: Write Back Template on page 93](#)
- [Write Back Limitations on page 93](#)

## Write Back Configuration Tasks

The process of configuring write back fields consists of the following tasks. You need to customize these tasks for your specific implementation:

- 1 Assess the reporting needs in your organization and make a list of write back fields needed and the reports in which they should appear.
- 2 Create a physical table in your database that has a column for each write back field needed. In the table create statement, Oracle recommends that you make the write back fields non-null-able.  
**NOTE:** For optimum security, store write-back database tables in a unique database instance.
- 3 Using the Administration Tool, configure the new table:
  - a Map the physical table into the logical model so that the logical fact columns are exposed and aggregate properly in the appropriate dimensions.
  - b Disable the Make Table Cacheable property for the write back table in the Physical Table window. This ensures that data written back to the database is displayed to the user, and not a cached value.
  - c Enable write back for the connection pool.

- d Set up the content filters so users can only access records appropriate to their position. For example, sales representatives can view only their own records, but the sales managers can view records for their direct reports.

For more information on the specific procedures, read *Oracle Business Intelligence Server Administration Guide*.

- 4 Create a write back template that specifies the SQL necessary to both insert and update values into the table you created. For more information, read [“Creating a Write Back Template” on page 92](#).
- 5 In Oracle BI Presentation Services, grant write back privileges:
  - a For administrators and report writers, enable the Manage Write Back privilege. This action enables the Write Back properties window in Answers and enables the Write Back interaction type for columns.
  - b For administrators, report writers, and selected users, enable the Write Back to Database privilege. This action enables the user interface controls for write back (fields being editable and the presence of the write back button), and enables the server call that writes data back to the database.

For more information on granting privileges, read [“Setting Privileges in Oracle BI Presentation Services Administration” on page 152](#).

- 6 In Answers, configure write back reports:
  - a Create a report that contains a table view that uses the new columns.
  - b In the report, for each new column, edit the column format. Set the Column Interactions field to Write Back.
  - c If necessary, set key columns to be Hidden Keys in the column format dialog.
  - d Edit the Table View properties, enabling the write back feature, and specifying the name of the write back template, and the text for the write back button.
  - e Save the report.
  - f Embed the report in a dashboard page.

For more information on creating reports, read *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.

## How Write Back Works

If a user has the Write Back to Database privilege, then the write back fields in their reports display as editable fields. If the user does not have this privilege, then the write back fields display as normal fields. If the user types a value in an editable field and clicks the write back button, then the application reads the write back template to get the appropriate insert or update SQL command. It then issues the insert or update command. If the command succeeds, it reads the record and updates the report. If there is an error in either reading the template or in executing the SQL command, an error message appears.

The insert command runs when a record does not yet exist and the user enters new data into the table. In this case, a user has typed in a table record whose value was originally null.

The update command runs when a user modifies existing data. To display a record that does not yet exist in the physical table to which a user is writing back, you can create another similar table. Use this similar table to display placeholder records that a user can modify in Oracle BI Dashboards.

## Creating a Write Back Template

The write back template is an XML-formatted file that contains SQL commands needed to insert and update records in the write back table and columns you have created. You can create multiple write back templates, customizing each one for the fields used in each specific report. In the report properties you specify the name of the write back template to use.

The write back template must meet the following requirements:

- To meet security requirements, you must specify the connection pool along with the SQL commands to insert and update records. This SQL references the values passed in the write back schema to generate the SQL statements to modify the database table. Values can be referenced either by position (such as @1, @3) or by column ID (@{c0}, @{c2}). Column positions start numbering with 1, whereas column IDs start with c0. The use of Column ID is preferred.

**NOTE:** The notation @n is not the same as @{cn-1}, because the column with ID cn-1 may not be the nth column in the table.

- You must include both an <insert> and an <update> element in the template. If you do not want to include SQL commands within the elements, then you must insert a blank space between the opening and closing tags. For example, you must enter the element as

```
<i nsert> </i nsert>
```

rather than

```
<i nsert></i nsert>
```

If you omit the blank space, then you will see a write back error message such as "The system is unable to read the Write Back Template 'my\_template'".

- If a parameter's data type is not an integer or real number, then add single quotes around it. If the database does not do Commits automatically, then add the optional postUpdate node after the insert and update nodes to force the commit. The postUpdate node typically follows this example:

```
<postUpdate>COMMI T</postUpdate>
```

- Store the write back template files in the CustomMessages folder. The system can have multiple CustomMessages folders, such as SAROOTDIR\web\msgdb\customMessages, where SAROOTDIR is the installation directory. For information, see ["Customizing the Oracle BI Presentation Services User Interface Using XML Message Files" on page 192.](#)

- The write back template files can have any name of your choosing, because the system reads all XML files in the CustomMessages folder. To ensure that write back works correctly, include in the WebMessage element of the file the name of the SQL template that you specified when you created the write back table. You can have multiple WebMessage elements in one file, with each element specifying one SQL template.

The following example shows the specification of the SQL template that is called "SetQuotaUseID."

```
<WebMessage name="SetQuotaUseID">
```

## Example: Write Back Template

A write back template might resemble this example:

```
<?xml version="1.0" encoding="utf-8" ?>
<WebMessageTables xmlns:sawm="com.siebel.analytics.web/message/v1">
<WebMessageTable lang="en-us" system="WriteBack" table="Messages">

  <WebMessage name="SetQuotaUseID">
    <XML>
      <writeBack connectionPool="Supplier">
        <insert>INSERT INTO regontypequota
VALUES(@{c0}, @{c1}, '{c2}', '{c3}', @{c4})</insert>
        <update>UPDATE regontypequota SET Dollars=@{c4} WHERE YR=@{c0} AND
Quarter=@{c1} AND Region='{c2}' AND ItemType='{c3}'</update>
      </writeBack>
    </XML>
  </WebMessage>

  <WebMessage name="SetQuota">
    <XML>
      <writeBack connectionPool="Supplier">
        <insert>INSERT INTO regontypequota VALUES(@1, @2, '@3', '@4', @5)</insert>
        <update>UPDATE regontypequota SET Dollars=@5 WHERE YR=@1 AND Quarter=@2
AND Region='@3' AND ItemType='@4'</update>
      </writeBack>
    </XML>
  </WebMessage>

</WebMessageTable>
</WebMessageTables>
```

## Write Back Limitations

Observe the following limitations for the write back feature:

- The write back abilities are for Table View only. Other views including chart, gauge, and pivot can be displayed but do not have edit fields for changing values.

- All values in write back columns are editable. When displayed in nonprinter friendly context, editable fields appear as if the user has Write Back privilege. However, when a logical column is mapped to a physical column that can change, the logical column returns values for multiple level intersections. This scenario can cause problems.
- Any field in a report can be flagged as a write back field, even if it is not derived from the write back table that you created. The responsibility for correctly tagging fields lies with the creator of the report.
- Write back reports do not support drill-down.
- The user interface does only minimal validation of data input. If the field is numeric and the user enters text data, then the user interface detects that and prevents the invalid data from going to the database. However, it does not detect other forms of invalid data input (values out of range, mixed text and numeric, and so on). When the user clicks the write back button and an insert or update is executed, invalid data results in an error message from the database. The user can then correct the faulty input. Report authors can include text in the write back report to aid the user, for example, "Entering mixed alphanumeric values into a numeric data field is not allowed."
- A template can contain SQL statements other than insert and update. The write back function passes these statements to the database. However, Oracle does not support or recommend the use of any statements other than insert or update.
- The write back feature is not suitable for entering arbitrary new records. In other words, do not use it as a data input tool.
- Numeric columns must contain numbers only. They should not contain any data formatting characters such as dollar signs (\$), octothorpes (#), percent signs (%), and so on.
- Text columns should contain string data only.

**CAUTION:** This feature takes user input and writes it directly to the database. The security of your physical database is your own responsibility. For optimum security, store write-back database tables in a unique database instance.

# 6

## Administering the Oracle BI Presentation Catalog

This chapter describes how to administer the Oracle BI Presentation Catalog and provides information about basic maintenance procedures.

You also can use Oracle Business Intelligence Catalog Manager to manage the Presentation Catalog. For more information on Catalog Manager, see [Chapter 7, “Managing Presentation Catalogs Using Oracle BI Catalog Manager.”](#)

This chapter contains the following topics:

- [About the Presentation Catalog on page 95](#)
- [Changing the Name and Location of the Presentation Catalog on page 96](#)
- [Configuring the Presentation Catalog for More Than 4000 Users on page 97](#)
- [Managing the Presentation Catalog Cache in Environments Running Multiple Instances of Oracle BI Presentation Services on page 97](#)
- [Creating a New Presentation Catalog on page 97](#)
- [Moving a Presentation Catalog to Another Installation on page 98](#)
- [Committing an Object to Production on page 98](#)
- [Replicating Presentation Catalogs on page 99](#)
- [Archiving a Presentation Catalog on page 109](#)
- [Administering Items in the Presentation Catalog on page 110](#)

### About the Presentation Catalog

The Presentation Catalog stores the content that users create in Answers and Dashboards. This content, which includes items such as folders, links, and objects (that is, requests, filters, prompts, dashboards, and so on), is stored in a directory structure of individual files.

**NOTE:** Oracle Business Intelligence Publisher reports are not saved in the Presentation Catalog. For more information about Oracle BI Publisher, see *Oracle Business Intelligence Publisher User's Guide*.

Each object is stored in its own .xml file. For example, a request created in Answers called Report 1 would be stored in a file named Report1.xml.

Each item has a corresponding attributes file. For example, the request called Report 1 would have a corresponding attributes file named report1.atr.

The attributes file contains the item's full name, access control list (ACL), description, and so on.

**NOTE:** To guarantee that only one writer can write to a file at one time, a lock file is created when an item is being written to. On rare occasions (for example, after a power outage), temporary lock files in the Presentation Catalog may not get cleaned up completely. If Oracle BI Presentation Services reports of such a lock file, you will need to delete it manually.

On installation of the Oracle Business Intelligence infrastructure, you are provided with a Presentation Catalog directory named default t.

The following locations are the default locations for the Presentation Catalog directory:

■ In Windows

SADATADIR\web\catalog

where SADATADIR is the data directory. The default data directory is C:\OracleBIData. Your data directory may be different.

■ In UNIX

SADATADIR/web/catalog

where SADATADIR is the data directory. The default data directory is /usr/local/OracleBIData. Your data directory may be different.

**NOTE:** In previous releases of Oracle BI Presentation Services, the Presentation Catalog (formerly known as the Siebel Analytics Web Catalog) was stored in a single file rather than in a directory structure of individual files. If you have a previous version of the Presentation Catalog, you will need to convert it to the new format. Also, because the Presentation Catalog is stored in a directory structure of individual files rather than a single file, automatic backups that were done in previous releases are no longer necessary; instead you can use the strategy your site has in place for file system backup. For more information on how to convert the Presentation Catalog to the new format, see the *Oracle Business Intelligence Infrastructure Upgrade Guide*.

## Changing the Name and Location of the Presentation Catalog

If you move the Presentation Catalog or change its name, you need to update the Oracle BI Presentation Services configuration file (instanceconfig.xml) to specify the new location or name.

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

The following entry is an example:

```
<CatalogPath>/usr/local/OracleBIData/web/catalog/default t</CatalogPath>
```



## Configuring the Presentation Catalog for More Than 4000 Users

If you have more than 4000 Presentation Catalog users or you intend to have more than 4000 Presentation Catalog users in the future, you need to turn on the hashing of users' home directories to take care of a file system limitation. To do so, you set the HashUserHomeDirectories element in the Oracle BI Presentation Services configuration file (instanceconfig.xml) to 2. When this element is turned on, for example, the default name for user Steve's home directory would become /users/st/steve.

The following entry is an example:

```
<Catalog>
    <HashUserHomeDirectories>2</HashUserHomeDirectories>
</Catalog>
```

**CAUTION:** This element must be set immediately after installing Oracle BI Presentation Services to be effective.

## Managing the Presentation Catalog Cache in Environments Running Multiple Instances of Oracle BI Presentation Services

If you are running multiple instances of Oracle BI Presentation Services (either through replication or clustering) you need to add the following entries in the Oracle BI Presentation Services configuration file (instanceconfig.xml) to manage when the Presentation Catalog cache is to be updated from disk:

```
<Catalog>
    <AccountIndexRefreshSecs>120</AccountIndexRefreshSecs>
    <AccountCacheTimeoutSecs>180</AccountCacheTimeoutSecs>
    <PrivilegeCacheTimeoutSecs>180</PrivilegeCacheTimeoutSecs>
    <CacheTimeoutSecs>120</CacheTimeoutSecs>
    <CacheCleanupSecs>600</CacheCleanupSecs>
</Catalog>
```

## Creating a New Presentation Catalog

The following procedure explains how to create a new Presentation Catalog.

### *To create a new Presentation Catalog*

- 1 Stop the service for Oracle BI Presentation Services.

**NOTE:** When Oracle BI Presentation Services is installed on a Microsoft IIS Web server, the IIS Web server creates temporary files for its Web caching capability in a location specified by the Microsoft IIS installation. If the Oracle BI Server is stopped before the Oracle BI Presentation Services, these temporary files usually remain, consuming disk space.

- 2 Specify a new location (one that does not exist already) for the Presentation Catalog by setting the CatalogPath element in the Oracle BI Presentation Services configuration file (instanceconfig.xml).

For more information, read [“Changing the Name and Location of the Presentation Catalog” on page 96](#).

- 3 Make sure that the new location for the Presentation Catalog is empty.
- 4 Restart the service for Oracle BI Presentation Services.

## Moving a Presentation Catalog to Another Installation

You can move an existing Presentation Catalog to another Oracle Business Intelligence installation by using WinZip (on Windows) or ZIP (on UNIX) to zip it up and then unzip it on the other installation.

Before moving an existing Presentation Catalog to another installation, it is recommended that you stop the service for Oracle BI Presentation Services.

For information about migrating a complete Oracle Business Intelligence installation, see the Technical Notes section on Oracle’s Siebel SupportWeb.

## Committing an Object to Production

You can commit a simple object (for example, a dashboard with privileges) to your production environment using the archive and unarchive functionality.

Committing a complex object (for example, an object that includes references to external filters) is a more advanced process. Oracle Corporation offers advanced training courses to guide you through this process. It is recommended that you attend one of these courses before you attempt to commit a complex object to production.

### *Committing a simple object to production*

- 1 Archive the object using one of the following:
  - Oracle BI Presentation Services Administration.

For more information on how to archive in Oracle BI Presentation Services Administration, see [“Archiving a Presentation Catalog” on page 109](#).

- Catalog Manager.

For more information on how to archive in Catalog Manager, see [“Archiving and Unarchiving a Presentation Catalog Using Catalog Manager” on page 132.](#)

- 2 Copy the archived file to the production machine.
- 3 On the production machine, unarchive the object. For more information on how to unarchive an object, see [“Archiving and Unarchiving a Presentation Catalog Using Catalog Manager” on page 132.](#)
- 4 Set the permissions on the object as appropriate.

## Replicating Presentation Catalogs

Oracle Business Intelligence can copy and merge contents of selected Presentation Catalog folders between instances of Oracle BI Presentation Services. The replication configuration can be split into individual tasks. The replication task is an instruction to periodically merge catalog contents for specified catalog folders from one server to another. Two-way replications are possible.

A typical scenario where replication is useful is when you use one instance of Oracle BI Presentation Services to prepare and publish shared reports, and use two or more production instances to support the users. In this scenario you share the catalog from Instance 1 to two production instances and then share the catalogs on each production instance with the other. To accomplish this, you set up the following replication tasks in the Oracle BI Presentation Services Replication Agent's (sawrepaj) configuration file:

- /shared: Instance1 to Instance2
- /shared: Instance1 to Instance3
- /users: Instance2 to Instance3
- /users: Instance3 to Instance2

When an instance of Oracle BI Presentation Services participates in replication, either as a publisher or subscriber, it tracks changes made to catalog items that are marked to be replicated and keeps them internally in replication log files. Another instance of Oracle BI Presentation Services can make a SOAP call to request to export those changes to a file or to import and replay modifications recorded in a file exported earlier from another instance. The Oracle BI Presentation Services Replication Agent uses SOAP to manage replication related activities on all instances of Oracle BI Presentation Services and performs import and export operations. For information on the SOAP calls used, read *Oracle Business Intelligence Web Services Guide*.

## About Replication Log Files

Replication log files record modifications made to catalog items that are subject to replication. There are two types of replication log files:

- Change log files — Contain records of modifications to catalog items that were made locally. These files are stored in {presentationcatalogpath}/replication/changelog folder, where {presentationcatalogpath} is the full path to the Presentation Catalog folder.

- **Playback log files** — Contain records of modifications to catalog items that were replayed from other instances of Oracle BI Presentation Services. These files are stored in {presentationcatalogpath}/replication/playback folder, where {presentationcatalogpath} is the Presentation Catalog folder.

Replication log files are kept on disk indefinitely, until you periodically clean them out. When performing replication operations, Oracle BI Presentation Services reads only replication log files from the time interval specified by the ReadLogRecordsSinceHoursAgo element in the Oracle BI Presentation Services configuration file (instanceconfig.xml). For more information on the ReadLogRecordsSinceHoursAgo element, see [“Editing the instanceconfig.xml File for Replication” on page 108](#).

While you might want to review replication log files, for example, for troubleshooting purposes, you should never edit log files manually.

### Replication Log File Records

A replication log file contains different types of records, with each record consisting of a number of fields separated by commas. The most important types of records that you will see in a replication log file are:

- **File header record.** Written at the beginning of each log file, it contains the following fields:  
Size, Type, Timestamp, Version, Flags
- **Oracle BI Presentation Services startup record.** Written each time Oracle BI Presentation Services starts up, it contains the following fields:  
Size, Type, Timestamp
- **Before change record.** Written when a Presentation Catalog item is about to be changed, it contains the following fields:  
Size, Type, Timestamp, Change sequence number, Change type
- **After change record.** Written immediately after a Presentation Catalog operation has been completed, it contains the following fields:  
Size, Type, Timestamp, Change sequence number, Operation outcome
- **File finished record.** Written as the last record in a replication log file, it contains the following fields:  
Size, Type, Timestamp, Name of next log file

where:

- **Size.** Record size in bytes encoded as a hexadecimal number.
- **Type.** Record type, such as:
  - **H.** File header record
  - **S.** Oracle BI Presentation Services startup record
  - **B.** Before change record
  - **A.** After change Record

- **F.** File finished record
- **Timestamp.** The timestamp of the record, written as a hexadecimal number representing the number of seconds from midnight (00:00:00), January 1, 1970 UTC.
- **Change sequence number.** A sequence number that should be the same in corresponding Before change and After change records.
- **Change type.** The type of change, written as a hexadecimal number representing a combination of the following flags:
  - 1. Insert
  - 2. Delete
  - 4. Write
  - 8. Change catalog item information
  - 16. Change owner
  - 32. Change security
- **Operation outcome.** The operation result, either:
  - 0. Fail
  - 1. Success

## Setup for Presentation Catalog Replication

To enable Presentation Catalog replication, set up the conditions described in this section.

### Edit the instanceconfig.xml for Replication

For each instance Oracle BI Presentation Services, you need to edit the Oracle BI Presentation Services configuration file (instanceconfig.xml) to:

- Enable replication. By default, the replication functionality is disabled for instances of Oracle BI Presentation Services.
- Configure replication for a clustered environment. In a clustered environment, several instances of Oracle BI Presentation Services can share the same Presentation Catalog. For replication to work properly, you need to:
  - Ensure that each instance of Oracle BI Presentation Services writes to its own log file to avoid concurrency issues
  - Make sure that changes made by all instances are taken into account during import and export operations
- Specify the number of records to be kept in a replication log file
- Specify the time period (in hours) from which replication log files are to be read for replication operations.

For more information on editing the instanceconfig.xml file for replication, see [“Editing the instanceconfig.xml File for Replication” on page 108](#).

## Create the Oracle BI Presentation Services Replication Agent Configuration File

You need to create the Oracle BI Presentation Services Replication Agent’s configuration file (config.xml) to specify which folders on which instances of Oracle BI Presentation Services are to be replicated. For more information, read [“Creating the config.xml File for Replication” on page 105](#).

## Use Oracle BI Presentation Services Replication Agent

You can run the Oracle BI Presentation Services Replication Agent (sawrepaj) on any computer that has network access to both instances of Oracle BI Presentation Services. This agent handles all the replication tasks. It has some command line options. For more information, see [“Using the Oracle BI Presentation Services Replication Agent” on page 103](#).

## Copy Presentation Catalog Files

The Oracle BI Presentation Services Replication Agent copies changes made to a Presentation Catalog. Because it only copies changes, and not the entire contents, you must first make a copy of the source Presentation Catalog on each of the subscribing instances of Oracle BI Presentation Services.

## Maintain the List of Presentation Catalog Folders to Be Replicated

Because the Presentation Catalog came from another instance, the list of catalog folders to be replicated may be incorrect. Use the sawrepaj mark command to maintain the list of catalog folders to be replicated. For more information, see [“Using the Oracle BI Presentation Services Replication Agent” on page 103](#).

## Resuming Replication If Replication Log Files Are Unavailable

If, for some reason, replication log files are unavailable in an instance of Oracle BI Presentation Services, you may need to resume replication by copying over the Presentation Catalog folders that the instance subscribes to. However, this method loses the catalog contents that were not replicated to other instances. The following method preserves all catalog contents.

**NOTE:** If you need to resume replication after Oracle BI Presentation Services has been offline for a time period in excess of that configured with the ReadLogRecordsSinceHoursAgo element in the config.xml file, you can adjust the value of ReadLogRecordsSinceHoursAgo so that log files in the offline period get replicated. Then, reset ReadLogRecordsSinceHoursAgo back to its original setting.

***To resume replication if replication log files are unavailable***

- 1 Use Oracle BI Catalog Manager to erase all replication logs in the {presentationcatalogpath}/replication/changelog and {presentationcatalogpath}/replication/playback folders, where presentationcatalogpath} is the full path to the Presentation Catalog folder.  
  
For more information about Catalog Manager, see [Chapter 7, “Managing Presentation Catalogs Using Oracle BI Catalog Manager.”](#)
- 2 Set the UseReplication element in the Oracle BI Presentation Services configuration file (instanceconfig.xml) to N. For more information, see [“Editing the instanceconfig.xml File for Replication” on page 108.](#)
- 3 Start the instance of Oracle BI Presentation Services.
- 4 Delete or rename folders that are replicated from other instances and copy them over from other instances using the sawrepaj remotecopy command.
- 5 Set the UseReplication element in instanceconfig.xml to Y. For more information, see [“Editing the instanceconfig.xml File for Replication” on page 108.](#)
- 6 Restart the instance of Oracle BI Presentation Services.
- 7 Restore the list of folders to be replicated using the sawrepaj mark command on the instance of Oracle BI Presentation Services. For more information, see [“Using the Oracle BI Presentation Services Replication Agent” on page 103.](#)
- 8 Reenable replication tasks by editing the configuration file to delete the lastPerformed attribute from all ReplicationTask elements that have the instance of Oracle BI Presentation Services as an import or export target.

## Using the Oracle BI Presentation Services Replication Agent

The Oracle BI Presentation Services Replication Agent (sawrepaj) is a utility that carries out the common replication tasks such as copy, export, import, and mark for replication.

The Oracle BI Presentation Services Replication Agent needs information about the instances of Oracle BI Presentation Services and the replication tasks. This information is stored in the config.xml file. For more information about the config.xml file, see [“Creating the config.xml File for Replication” on page 105.](#)

The command line for the Oracle BI Presentation Services Replication Agent uses the following format:

■ In UNIX:

```
sawrepaj.sh [/C path] command [command parameters]
```

The sawrepaj.sh file is located in SAROOTDIR\web\bin\sawrepaj (where SAROOTDIR is the installation directory).

■ In Windows

```
sawrepaj.bat [/C path] command [command parameters]
```

The sawrepaj.bat file is located in SAROOTDIR\web\bin\sawrepaj (where SAROOTDIR is the installation directory).

The path following the /C specifies the path to the config.xml file. The command can be one of the following:

- mark
- remotecopy
- run

## mark

Adds or removes the specified catalog folders from the list of catalog folders that are to be replicated on all or specified Oracle BI Presentation Servers. The list of catalog folders to be replicated is stored in a config item located in {presentationcatalogpath}/root/system/replication, where {presentationcatalogpath} is the full path to the Presentation Catalog folder.

Adding a catalog folder to the list does not mean that the corresponding catalog item is immediately replicated. Only future modifications are noted in the replication log file and subsequently get replicated.

The syntax for the mark command is:

```
sawrepaj [/C path] mark {all | servername} [/n] [catalogfolders]
```

- **all | servername.** The name of the Oracle BI Presentation Server (or all) on which to run the mark command. If you use a specific server, the name you specify must match the name attribute of the corresponding server element in the config.xml file.
- **/n.** If present indicates that the catalog folder should be removed from the list of catalog folders to be replicated, otherwise it is added.
- **catalogfolders.** A list of catalog folders to add or remove from the list of catalog folders to be replicated. Separate each folder in the list with a space. To add or remove the entire Presentation Catalog (including all folders and such information as system privileges, Catalog Group membership, and so on), use /. If you do not specify any folders, then sawrepaj executes the mark command on every folder for the specified servers listed in the config.xml file.

For example:

```
sawrepaj /C Oracl eBI \web\bi n\sawrepaj mark all /
```

## remotecopy

Exports the contents of the specified catalog folders from the source server and imports them in the destination server.

The syntax for the remotecopy command is:

```
sawrepaj [/C path] remotecopy sourceServer destinationServer catalogfolders
```

- **sourceServer.** The name of the source server as specified in the config.xml file.



- **destinationServer.** The name of the destination server as specified in the config.xml file.
- **catalogfolders.** A list of catalog folders to copy remotely. Separate each folder in the list with a space. If you do not specify any folders, then sawrepaj executes the remotecopy command on every folder for the specified servers listed in the config.xml file.

For example:

```
sawrepaj /C Oracl eBI \web\bi n\sawrepaj remotecopy Server1 Server2 users shared
```

## run

Executes all replication tasks that are set up in config.xml file and that have not expired. This command does not have any runtime parameters.

The syntax for the run command is:

```
sawrepaj [/C path] run
```

For example:

```
sawrepaj /C Oracl eBI \web\bi n\sawrepaj run
```

## Creating the config.xml File for Replication

The structure of the Oracle BI Presentation Services Replication Agent's configuration file (config.xml), located in SAROOTDIR\web\bin\sawrepaj (where SAROOTDIR is the installation directory), is as follows:

```
<Config>
  <General>
    < ExportDirectory />
    < LogExpiresHours/>
    < RetryAttempts/>
  </General>
  <Server/>
  <Foldersset>
    <Folder/>
  </Foldersset>
  <ReplicationTask/>
</Config>
```

Table 12 describes the elements that you can set in the config.xml file.

Table 12. Elements in the config.xml File

Element	Parent	Occurrences	Description
Config	N/A	1	XML root element.
General	Config	1	Contains general settings applicable to all instances and replication tasks.

Table 12. Elements in the config.xml File

Element	Parent	Occurrences	Description
Export Directory	General	1	<p>Contains the UNC path to the shared directory where export files should be placed. It should be accessible by the same name from all instances of Oracle BI Presentation Services.</p> <p>In addition, the user account under which an instance of Oracle BI Presentation Services is running must have read/write permissions to this directory.</p>
LogExpiresHours	General	1	<p>Specifies the time in hours (as a double value) that replication logs expire on all instances of Oracle BI Presentation Services.</p> <p>Set this element to the value of the ReadLogRecordsSinceHoursAgo element that is the lowest among all instances of Oracle BI Presentation Services participating in replication. For more information on the ReadLogRecordsSinceHoursAgo element, see <a href="#">“Editing the instanceconfig.xml File for Replication” on page 108</a>.</p>
RetryAttempts	General	1	<p>Specifies the number of times an attempt to change an item is to be retried.</p> <p>(An attempt to change an item may need to be retried, for example, if an item was locked.)</p>
Server	Config	1...n	<p>Defines connection information for each Oracle BI Presentation Server. Its attributes are:</p> <ul style="list-style-type: none"> <li>■ <b>name</b>. The logical id of the server, which is used to identify it in replication tasks and in the sawrepaj command line.</li> <li>■ <b>url</b>. The URL of the instance of Oracle BI Presentation Services, such as: http://localhost/analytics/saw.dll</li> <li>■ <b>user</b>. The user name.</li> <li>■ <b>pwd</b>. The password.</li> </ul>
Folderset	Config	0...n	<p>Defines a list of catalog folders. Its only attribute is:</p> <ul style="list-style-type: none"> <li>■ <b>name</b></li> </ul>

Table 12. Elements in the config.xml File

Element	Parent	Occurrences	Description
Folder	Folderset	0...n	Adds a folder to the folderset. It specifies the full path to the catalog folder.
ReplicationTask	Config	0...n	<p>Defines the replication tasks. Its attributes are:</p> <ul style="list-style-type: none"> <li>■ <b>source.</b> The source server name. This must match an instance defined in the Server element.</li> <li>■ <b>destination.</b> The destination server name. This must match an instance defined in the Server element.</li> <li>■ <b>folders.</b> The name of the folders set. This must match a folder set defined in the Folderset element.</li> <li>■ <b>lastPerformed.</b> The timestamp of the last successful run of this task. The sawrepaj utility updates this value.</li> <li>■ <b>localChanges.</b> Specifies whether changes made directly on the source server are to be exported: <ul style="list-style-type: none"> <li>■ <b>true.</b> Changes are to be exported.</li> <li>■ <b>false.</b> Changes are not to be exported.</li> </ul> Default: true </li> <li>■ <b>remoteChanges.</b> Specifies whether changes that were made on another server and that were replicated on the source server are to be reexported: <ul style="list-style-type: none"> <li>■ <b>true.</b> Changes are to be reexported.</li> <li>■ <b>false.</b> Changes are not to be reexported.</li> </ul> Default: false </li> </ul>

### Example config.xml File

The following XML file is an example of the config.xml file:

```
<?xml version="1.0" encoding="UTF-8"?>
<!-- Oracle BI Presentation Services Replication Agent Configuration File -->
<!-- The following example specifies that the entire Presentation Catalog (that is
all folders) on Server 1 is to be replicated on server 2 and that the entire Presentation
Catalog on Server 2 is to be replicated on server 1. -->
```

```

<Config>
  <General>
    <ExportDirectory>\\host1\shared</ExportDirectory>
  </General>

  </Server name="1" pwd="" url="http://host1/analytcs/saw.dll"
user="adminstrator"      pwd="" />
  </Server name="2" pwd="" url="http://host2/analytcs/saw.dll"
user="adminstrator"      pwd="" />

  <FolderSet name="all">
    <Folder></Folder>
  </FolderSet>

  <ReplicationTask destination="2" source="1" folders="all" />
  <ReplicationTask destination="1" source="2" folders="all" />
</Config>

```

## Editing the instanceconfig.xml File for Replication

Table 13 describes the elements that you can set for replication in the Oracle BI Presentation Services configuration file (instanceconfig.xml).

Table 13. Elements for Replication in the instanceconfig.xml File

Element	Description
UseReplication	<p>Specifies whether the instance of Oracle BI Presentation Services is to participate in replication, as either a publisher or subscriber.</p> <ul style="list-style-type: none"> <li>■ <b>Y</b>. Enables replication.</li> <li>■ <b>N</b>. Disables replication.</li> </ul> <p>Default: N</p>
Replication/Cluster/MyInstanceID	<p>Identifies the suffix (%INSTANCEID%) to be used for the log files generated by this instance of Oracle BI Presentation Services. Log files are named as follows:</p> <ul style="list-style-type: none"> <li>■ For change log files: sawchange_%INSTANCEID%_%SEQNUM%.log</li> <li>■ For playback log files: sawplayback_%INSTANCEID%_%SEQNUM%.log</li> </ul> <p>This element is required in a clustered environment.</p>

Table 13. Elements for Replication in the instanceconfig.xml File

Element	Description
Replication/Cluster/IDsInCluster	Identifies, by ID, all instances of Oracle BI Presentation Services that are in the cluster. Separate each ID by a comma.  This element is required in a clustered environment.
Replication/RecordsInFileLimit	Specifies the number of records to be kept in a replication log file.  Default: 5000
Replication/ReadLogRecordsSinceHoursAgo	Specifies the time period (in hours) from which replication log files are to be read for replication operations.  Default: 168

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes.”](#)

## Archiving a Presentation Catalog

You can archive an entire Presentation Catalog or an individual catalog folder in the Presentation Catalog. When you archive a Presentation Catalog (that is, the catalog root folder) or an individual catalog folder, all objects in the folder and the folder's subfolders are saved in single compressed file.

**NOTE:** The archive function is also available to Answers and Delivers users who have been assigned the Catalog: Archive Catalog privilege. For more information about the archive function in Answers and Delivers, see the *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*. For more information on privileges, see [“About Setting Oracle BI Presentation Services Privileges”](#) on page 152.

You also can use Catalog Manager to archive a Presentation Catalog or individual catalog folder as well as unarchive a Presentation Catalog or individual catalog folder. (The unarchive functionality is available only in Catalog Manager.) For more information about using Catalog Manager, read [Chapter 7, “Managing Presentation Catalogs Using Oracle BI Catalog Manager.”](#)

### *To archive an entire Presentation Catalog or an individual catalog folder in the Presentation Catalog*

- 1 Log in to Oracle BI Presentation Services.
- 2 Choose Settings > Administration.
- 3 Click the link Manage Presentation Catalog.

The Manage Catalog screen appears.

- 4 If you want to archive a catalog folder (and all its subfolders) rather than the entire catalog, navigate to the folder.
- 5 If you want to archive the:
  - Permissions that are assigned to each item or folder, select the Keep Permissions checkbox.  
If you do not select this option, the archiving process will not include any permissions. Upon unarchiving, the system will assign the parent folder's permissions to all of the items and folders.
  - Timestamps that are assigned to the item and folder that you are archiving, select the Keep Timestamp checkbox.  
If you do not select this option, the archiving process will not include timestamp information. Upon unarchiving, the system will apply a timestamp indicating the time at which the item or folder is unarchived.
- 6 Click the Archive Catalog button.  
The File Download dialog box appears.
- 7 Click Save.  
The Save As dialog box appears
- 8 Complete the Save As dialog box and click Save.

## Administering Items in the Presentation Catalog

You administer shared Presentation Catalog folders through the Manage Catalog screen in Oracle BI Presentation Services Administration. You can view folders and contents including hidden items, and create, rename, copy, move, and delete folders and contents. You can also take ownership of an item. (Taking ownership of an item allows only you to make changes to it. This is useful if a user needs assistance with, for example, a request.)

You also can use Catalog Manager to administer items in the Presentation Catalog. For more information about using Catalog Manager, read [Chapter 7, "Managing Presentation Catalogs Using Oracle BI Catalog Manager."](#)

**NOTE:** Changes made in the Presentation layer of Oracle BI Administration Tool can affect reports and dashboards based on those tables and columns. You can use Catalog Manager to keep the Presentation Catalog in sync with these changes in the Presentation layer.

For information about changing permissions to an item in the Presentation Catalog, read ["About Setting Oracle BI Presentation Services Permissions"](#) on page 147.

### *To display the shared Presentation Catalog folders*

- 1 Log in to Oracle BI Presentation Services.
- 2 Choose Settings > Administration.

- 3 Click the link Manage Presentation Catalog.

The Manage Catalog screen appears.

- 4 Click the Shared Folder link.

### ***To show hidden items***

- Select the Show Hidden Items check box.

This action reveals, for example, the following hidden items in the user's home directory:

- \_alerts
- \_briefingbook
- \_delivers
- \_filters
- \_ibots
- \_portal
- \_prefs
- \_selections
- \_subscriptions

**NOTE:** The availability of the Show Hidden Items check box is controlled by the See Hidden Items privilege. For more information, read [“Default Oracle BI Presentation Services Privilege Assignments”](#) on page 154.

### ***To create a new folder***

- Click the link Create New Folder and follow the instructions on the screen.

### ***To view the contents of a folder***

- Click the folder name.

### ***To take ownership of an item***

- 1 Navigate to the item.
- 2 Click the Properties icon for the item.  
The Item Properties screen appears.
- 3 If you have the appropriate authority, you can take ownership of the item or folder by clicking one of the following links:
  - Take Ownership of this item
  - Take Ownership of this item and all subitems

### *To rename a folder or an item*

- 1 Navigate to the folder or item to rename.
- 2 Click the Edit name and Description icon for the item.  
The Rename Item screen appears.
- 3 Type a new name for the item.  
You can also type a description.
- 4 To preserve references that other users might have to the prior name of the item, select the following option:  
Preserve references to the old name of this item  
If you do not select this option, users referencing this item cannot display it.
- 5 Click Rename.

### *To delete a folder or an item*

- 1 Navigate to the folder to delete.
- 2 Click the folder's Delete icon.  
The Confirm Item Deletion screen appears.  
**NOTE:** When deleting shared folders or items, be aware that other users who have added shared items to their personal dashboards no longer have access to them.
- 3 To confirm the delete, click Yes.

### *To copy or move an item*

- 1 Navigate to the item.
- 2 Click Copy/Move button for the item.  
The Copy/Move Item Here screen appears.
- 3 Follow the instructions given on the screen.
  - To create a new folder, click the link Create New Folder and follow the instructions on the screen.
- 4 To show hidden items, select the Show Hidden Items check box.  
This action reveals, for example, the following hidden items in the user's home directory:
  - \_alerts
  - \_briefingbook
  - \_delivers
  - \_filters
  - \_ibots



- \_portal
- \_prefs
- \_selections
- \_subscriptions

**NOTE:** The availability of the Show Hidden Items check box is controlled by the See Hidden Items privilege. For more information, read [“Default Oracle BI Presentation Services Privilege Assignments” on page 154](#).

- 5 When done, click Copy/Move Item Here.



# Managing Presentation Catalogs Using Oracle BI Catalog Manager

This chapter explains how to manage Presentation Catalogs using Oracle BI Catalog Manager.

This chapter contains the following topics:

- [About Catalog Manager on page 115](#)
- [Guidelines for Working with Catalog Manager on page 116](#)
- [Starting Catalog Manager on page 116](#)
- [Opening Presentation Catalogs in Catalog Manager on page 116](#)
- [About the Catalog Manager Workspace on page 119](#)
- [Managing the View of the Catalog Manager Workspace on page 120](#)
- [Searching for Presentation Catalog Items Using Catalog Manager on page 121](#)
- [Copying and Pasting Items Between Presentation Catalogs on page 122](#)
- [Renaming Presentation Catalog Items on page 123](#)
- [Working with the Properties of Presentation Catalog Items on page 123](#)
- [Setting Permissions of Presentation Catalog Items on page 124](#)
- [Viewing and Editing Presentation Catalog Objects in XML on page 125](#)
- [Setting Browser Preference in Catalog Manager on page 126](#)
- [Previewing Objects from Catalog Manager on page 126](#)
- [Searching for and Replacing Presentation Catalog Text Using Catalog Manager on page 127](#)
- [Creating Reports to Display Presentation Catalog Data Using Catalog Manager on page 129](#)
- [Localizing Presentation Catalog Captions on page 130](#)
- [About Upgrading the Presentation Catalog to a Newer Version on page 132](#)
- [Archiving and Unarchiving a Presentation Catalog Using Catalog Manager on page 132](#)

## About Catalog Manager

Catalog Manager is a tool that lets you perform online and offline management of Presentation Catalogs. It should be installed on a secure machine accessible only to Oracle Business Intelligence administrators.

You can use Catalog Manager to:

- Manage Presentation Catalog items (that is, folders, links, and objects [requests, filters, prompts, dashboards, and so on]). For example, you can rename and delete items, and move and copy items within and between Presentation Catalogs.

- View and edit Presentation Catalog objects in Extensible Markup Language (XML).
- Preview objects, such as requests and prompts.
- Search for and replace Presentation Catalog text.
- Search for Presentation Catalog items.
- Create reports to display Presentation Catalog data.
- Localize Presentation Catalog captions.
- Upgrade Presentation Catalogs to new versions without losing any site-specific changes and enhancements.

**NOTE:** Many of the operations that you can perform in Catalog Manager, can also be performed through the Manage BI Catalog activity in Oracle BI Presentation Services Administration. For more information, read [Chapter 6, “Administering the Oracle BI Presentation Catalog”](#) and [Chapter 8, “Managing Oracle BI Presentation Services Security.”](#)

## Guidelines for Working with Catalog Manager

The guidelines for working with Catalog Manager are:

- Always make backup copies of the Presentation Catalogs that you are working with.
- Be sure of changes that you plan to make. Catalog Manager commits changes immediately. There is no undo function nor are there any error messages to tell you that a particular change will not display well in Answers or in Dashboards. However, if you do make any unwanted changes, you can revert to your latest saved backup.
- Do not copy and paste into email, as this is not supported.

## Starting Catalog Manager

Use the following procedure to start Catalog Manager.

### *To start Catalog Manager*

- On the machine where Catalog Manager is installed, choose Start > Programs > Oracle Business Intelligence > Catalog Manager.

## Opening Presentation Catalogs in Catalog Manager

You can open a Presentation Catalog in one of two modes:

- Online mode — Connects to a Presentation Catalog on a running Web server. In this mode your permissions are applied. You can see only those items for which you have permission.

- Offline mode — Connects to a local file system. In this mode, you are logged in as a super user or system user, and no permissions are applied. You can see all items in the Presentation Catalog.

## **Operations available in online mode and offline mode**

Many of the operations that you can perform using Catalog Manager are available in both online mode and offline mode. A few operations are available in only one mode or the other. Generally, the operations available in:

- Online mode are read-only operations and write operations that do not affect the entire catalog, such as setting permissions of an item
- Offline mode include most of the operations available in online mode as well as write functions that affect the entire catalog, such as searching for and replacing Presentation Catalog text

Specifically, the operations that you can perform in each mode are as follows:

Online mode operations	Offline mode operations
Cutting items	Cutting items
Copying items	Copying items
Pasting items	Pasting items
Copying items for another catalog	Copying items for another catalog
Pasting items from another catalog	Pasting items from another catalog
Creating shortcuts of items	Creating shortcuts of items
Deleting items	Deleting items
Renaming items without reference updates	Renaming items without reference updates
Refreshing the Catalog Manager workspace	Refreshing the Catalog Manager workspace
Creating folders	Creating folders
Setting permissions of items	Setting permissions of items
Working with properties of items	Working with properties of items
Managing the view of the workspace	Managing the view of the workspace
Searching for items	Searching for items
Creating reports to display Catalog Manager data	Creating reports to display Catalog Manager data
Setting browser preference	Setting browser preference
Previewing objects	Renaming items with reference updates (known as Smart Rename)
	Searching for and replacing Presentation Catalog text
	Exporting captions for localization purposes
	Upgrading Catalog Managers to newer versions

### Deciding whether to use online mode or offline mode

Whether you use online mode or offline mode depends on the activity that you want to perform. Generally, it is recommended that you use:

- Online mode when you want to make minor incremental changes or additions to the Presentation Catalog, such as changes to permissions, updates to a single item, or migration of new items to a production environment

- Offline mode when you want to make Presentation Catalog-wide changes, such as globally renaming items or moving multiple items for reorganization

**NOTE:** Generally, working in offline mode is faster than working in online mode. This is because you are accessing, creating, and updating the individual files directly, and Presentation Catalog does not have to communicate with Oracle BI Presentation Services as it does when you are working in online mode.

### To open a Presentation Catalog

- 1 In Catalog Manager, choose File > Open Catalog.
- 2 Complete the necessary fields.

Some of the fields are described in the following table.

Field	Description
Type	Select the mode (online or offline) in which to open the Presentation Catalog.
Path	Enter the path to the Presentation Catalog: <ul style="list-style-type: none"><li>■ If you are opening the Presentation Catalog in online mode, the URL to Oracle BI Presentation Services, for example: http://&lt;machinename&gt;/analytics/saw.dll</li><li>■ If you are opening the Presentation Catalog in offline mode, the Presentation Catalog folder on the local file system, for example: C:\OracleBIData\web\catalog\default</li></ul>
Read-Only	Select this field to open the Presentation Catalog in read-only mode.

- 3 Click OK.

## About the Catalog Manager Workspace

The Catalog Manager workspace allows you to view and work with Presentation Catalog items. It displays the following folders for an open Presentation Catalog:

- The shared folder— Contains content that is shared among Catalog users. This includes the preconfigured dashboards and requests that are distributed with prebuilt applications, and other items such as shared filters.
- The system folder — Contains administrative elements of Oracle BI Presentation Services. Some of these elements are distributed with the product, and others are set up by you as the Oracle BI Presentation Services Administrator, such as privileges.
- The users folder — Contains content that Catalog users with the appropriate permissions have saved to their personal folders, such as individual requests.

## What the Catalog Manager Looks Like

Catalog Manager consists of the following main components:

- **Menu bar** — Lets you access the following menus:
  - **File** — Provides options that let you open and close Presentation Catalogs, exit Catalog Manager, and so on.
  - **Edit** — Provides options that let you manage Presentation Catalog items, such as Cut, Copy, Permissions, and so on. (Many of these options are also available on the right-mouse pop-up menu.)
  - **View** — Provides options to manage the view of the Catalog Manager workspace, such as Show Tree, Show Job Status, and so on.
  - **Tools** — Provides options that let you manage Presentation Catalogs, such as Search and Replace, Upgrade Catalog, and so on.
  - **Help** — Provides options to access the Oracle Web site and to the information about Catalog Manager.
- **Toolbar** — Provides quick access to commonly used options, such as Cut, Copy, Paste, and so on.
- **Tree pane** — Displays Presentation Catalog folders. The pane also displays objects but only if the Show Objects in Tree option on the View menu is selected.
- **Table pane** — Displays Presentation Catalog folders and objects. It consists of:
  - The navigation bar, where you can navigate to the Presentation Catalog item that you want to work with by typing its pathname.
  - These 5 columns: Name, Type, Permissions, Date Created, and Last Modified.

The Type column identifies the type of item. Items that are identified as “unknown file” are generally internally-used items, and their type is not exposed in Catalog Manager.
- **Right-mouse pop-up menu** — Provides options that let you manage Presentation Catalog items, such as Rename, Properties, Permissions, and so on. (Many of these options are also available on the Edit menu.)

## Managing the View of the Catalog Manager Workspace

You can manage what you view in the Catalog Manager. For example, you can show objects in the Tree pane or show job statuses.



*To manage the view of the Catalog Manager workspace*

- In Catalog Manager, choose View and then one of these options:

Option	Description
Show Tree	Displays the Tree pane, if you previously had closed it
Show Table	Displays the Table pane, if you previously had closed it
Show Job Status	Displays the Background Job Status pane, where you can view the progress of processes that you have run, such as Search and Replace, Smart Rename, and so on. You can also remove all finished jobs and set progress preferences using the icons in the upper-right corner of the pane.
Show Objects in Tree	Displays objects (that is, requests, filters, and so on) in addition to folders in the Tree pane.
Refresh	Refreshes the items displayed in the Tree and Table panes. (You might want to refresh the data, for example, if someone else makes changes to the Presentation Catalog while you are working with it and you want to see the changes.)

## Searching for Presentation Catalog Items Using Catalog Manager

You can search for items in the Presentation Catalog using the Search function. For example, you might want to search for all items that have a property with the value of “administrator.”

When you search, you can limit the search by:

- Name — Limits the search to the names of items.
- Description — Limits the search to the Description property.
- Property values — Limits the search to the values of properties.
- Owner — Limits the search to the owners of items.
- Object type — Searches for all types of objects or limits the search to the specific type of object that you specify. You can specify folders, requests, filters, iBots, dashboard prompts, or dashboard pages.
- Date — Limits the search to items that were created on the dates that you specify or to items that were last modified on the dates that you specify.

*To search for an item:*

- 1 In Catalog Manager, open the Presentation Catalog.
- 2 Click Search on the Toolbar.
- 3 In the Search for any or all criteria below field, type the word or phrase to search for.

- 4 If you want to limit the search, click Advanced Search.
- 5 In the Advanced Search area, specify the constraints for the search.
- 6 Click Search.

**TIP:** When you have finished searching, click Explorer on the Toolbar to return to the Tree and Table panes.

## Copying and Pasting Items Between Presentation Catalogs

You can copy items from one catalog and paste them into another catalog. The mode in which the catalogs are opened makes no difference; that is, you can copy and paste items from an:

- Online catalog to an offline catalog (or an offline catalog to an online catalog)
- Online catalog to another online catalog
- Offline catalog to another offline catalog

This is especially useful, for example, if you want to develop new items in a catalog offline and then migrate them to a production environment without having to shutdown Oracle BI Presentation Services.

Presentation Catalogs are structured in hierarchical folders. When copying or merging items, remember to also copy any items that are associated with them, such as dashboard folders, request links, and requests. URL paths in external applications may need to be re-established after a copy or merge operation if the entire folder path is not copied, for example, if added to the dashboard as a link or text.

### *To copy and paste items between Presentation Catalogs*

- 1 In Catalog Manager, open the Presentation Catalog that you want to change, that is the target catalog.  
**TIP:** If the both catalogs have the same name, you might want to rename one of the catalogs before opening it to help distinguish between the two catalogs as you work.
- 2 Using another instance of the Catalog Manager, open the Presentation Catalog that contains the items that you want to copy, that is the source catalog.
- 3 If necessary, reposition both instances of Catalog Manager on your screen so you can display the title bars of both Catalog Manager instances.
- 4 In the source Presentation Catalog, right-click the source item and choose Copy for another catalog.
- 5 In the target Presentation Catalog, right-click at the point where you want to paste the source item and choose Paste from another catalog.

## Renaming Presentation Catalog Items

You can rename items in the Presentation Catalog. This can be useful when you are migrating from a development environment to a production environment.

There are two ways to rename an item:

- Rename without reference updates — Renames the item and preserves the references to the original name that other catalog items might have
- Rename with reference updates — Renames the item and changes references that other items might have to the new name (that is, original name references are not preserved).

**NOTE:** To rename items with reference updates, you must open the Presentation Catalog in offline mode.

**CAUTION:** Do not rename the “My Dashboard” dashboards in the Users folder.

### *To rename an item without reference updates*

- 1 In Catalog Manager, open the Presentation Catalog.
- 2 Navigate to the item to be renamed.
- 3 Right-click the item in the Name column and choose Rename.
- 4 Type a new name for the item.

### *To rename an item with reference updates*

- 1 In Catalog Manager, open the Presentation Catalog in offline mode.
- 2 Navigate to the item to be renamed.
- 3 Right-click the item in the Name column and choose Smart Rename.
- 4 Type a new name for the item.

**NOTE:** A progress bar in the lower right-hand corner of the window shows the progress of the reference updates.

## Working with the Properties of Presentation Catalog Items

Using the Properties option of Catalog Manager, you can:

- Create, view, edit, and delete the properties of Presentation Catalog items.
- Take ownership of Presentation Catalog items.

Taking ownership of an item allows only you to make changes to it. This is useful if a user needs assistance with, for example, a request.

- Change attributes of Presentation Catalog items to hide them from display in Oracle Business Intelligence.

### *To work with the properties of a Presentation Catalog item*

- 1 In Catalog Manager, open the Presentation Catalog.
- 2 Navigate to the item.
- 3 Right-click the item in the Name column and choose Properties.
- 4 Perform the necessary tasks:
  - a To create, edit, or delete a property, use the New, Edit, or Delete button as appropriate.

**NOTE:** The New button is used to create a new property. You should use it only if instructed to do so by Oracle Corporation.
  - b To take ownership of an item, click the Take ownership button.
  - c To change the attribute of an item to hidden (which hides the item from display in Oracle Business Intelligence), select the Hidden option.

**NOTE:** The Read-Only option is unused. The System option indicates that the item is maintained internally and should not be altered.
- 5 Click Close.

## Setting Permissions of Presentation Catalog Items

Permissions are used to control access to Presentation Catalog items.

For more information about permissions in Oracle BI Presentation Services, read [Chapter 8, "Managing Oracle BI Presentation Services Security."](#)

### *To set permissions of a Presentation Catalog item*

- 1 In Catalog Manager, open the Presentation Catalog.
- 2 Navigate to the item.
- 3 Right-click the item in the Name column and choose Permissions.

The Permissions dialog box displays these two lists:

- **Users and groups (Explicit Permissions) list** — Shows the users and groups that have explicit permissions granted to this item.
- **Additional users and groups (Effective Permissions) list** — Shows the users and groups that have access granted through group inheritance, and users and groups that have no access to the request.

- 4 If the item whose permissions you want to set is in the Additional users and groups (Effective Permissions) list, move it into the Users and groups (Explicit Permissions) list by selecting it and clicking the left arrow button (<).

**NOTE:** To view groups only, select the Show groups only option.

- 5 Select the item in the Users and groups (Explicit Permissions) list.
- 6 Select the new permission from the drop-down list in the Permissions column:

Permission	What It Means
No Access	Denies the user or group access to the item. Explicitly denying access takes precedence over any other permission.
Read	Allows the user or groups to view the item, but not make any changes.
Traverse	Allows the user or groups to access objects in folders within the selected folder when the user does not have permission to the selected folder.  Example: The user is granted Traverse permission to the /shared/test folder. The user cannot access objects in the /shared/test folder, but can access objects stored in lower-level folders, such as /shared/test/guest.
Change/Delete	Allows the user or group to view, change, or delete the item.
Full Control	Allows the user or group to have full control over the item. This is the level of authority granted by default to the preconfigured Administrator user ID.

- 7 Click the Apply Permissions: Recursively option, if appropriate.
- 8 Click OK.

**NOTE:** If you move a user or group from the Users and groups (Explicit Permissions) list to the Additional users and groups (Effective Permissions) list, the user or group privileges are reset to No Access. To move a user or group from one list to another, highlight it and click the right or left arrow button, as appropriate.

## Viewing and Editing Presentation Catalog Objects in XML

You can view and edit the XML description of Presentation Catalog objects such as requests, dashboards, filters and so on.

**CAUTION:** If you change the XML code, you are changing the representation of the object in the Presentation Catalog.

### *To view the XML description of an object*

- 1 In Catalog Manager, open the Presentation Catalog.
- 2 Navigate to the object.

- 3 Right-click the object in the Name column and choose Properties.
- 4 Click Edit XML.
- 5 When you are done viewing the XML definition, close the XML dialog box.
- 6 Click Close in the Properties dialog box.

#### *To edit the XML description of an object*

- 1 In Catalog Manager, open the Presentation Catalog.
- 2 Navigate to the object.
- 3 Right-click the object in the Name column and choose Properties.
- 4 Click Edit XML.
- 5 Make the changes in the Object XML area.

**NOTE:** When you edit the XML description of an object, Presentation Catalog checks only that the XML is well-formed; it does not check for any other errors.

- 6 Click Save.
- 7 Click Close in the Properties dialog box.

## Setting Browser Preference in Catalog Manager

If you are going to preview objects from Catalog Manager, you need to identify the default browser in which to display these objects. For more information on previewing objects, read [“Previewing Objects from Catalog Manager.”](#)

#### *To set your browser preference*

- 1 In Catalog Manager, choose Tools > Preferences.
- 2 In the Default Browser field, select the browser that is the same one that you have set to be the default browser for your operating system.
- 3 Click OK.

## Previewing Objects from Catalog Manager

You can preview objects, such as requests or prompts, from Catalog Manager.

**NOTE:** To preview objects, you must open the Presentation Catalog in online mode.

### *To preview an object*

- 1 In Catalog Manager, open the Presentation Catalog in online mode.
- 2 Navigate to the object.
- 3 Right-click the object in the Name list and choose Preview.

## Searching for and Replacing Presentation Catalog Text Using Catalog Manager

You can search for specific text in the Presentation Catalog and replace it with other text using Catalog Manager.

Specifically, you can search for and replace:

- A single text string
- Multiple text strings all at once

**NOTE:** To search for and replace text, you must open the Presentation Catalog in offline mode.

## Searching for and Replacing a Single Presentation Catalog Text String

Use this procedure to search for a single text string in the Presentation Catalog and replace it with other text.

### *To search for and replace a single text string*

- 1 In Catalog Manager, open the Presentation Catalog in offline mode.
- 2 Choose Tools > Search and Replace.
- 3 In the Search (general) field, type the text string to search for.
- 4 In the Replace with field, type the replacement text.
- 5 Click OK.

## About Searching for and Replacing Multiple Presentation Catalog Text Strings

You can search for and replace multiple Presentation Catalog text strings all at once by importing a XML file that identifies each text string to search for and replace.

## Format of the XML File for Searching for and Replacing Multiple Text Strings

In the search and replace XML file, you use an `<action>` element to identify each text string to search for and replace. The `<action>` elements are contained in a `<commands>` element.

The `<action>` element has the following attributes:

- `command` — Specifies whether you want to replace text, a Column name, or a Subject Area name. Valid values are:
  - `textReplace` — Replaces text other than the name of a Column or the name of a Subject Area.
  - `renameColumn` — Replaces the name of a Column.
  - `renameSubjectArea` — Replaces the name of a Subject Area.
- `oldValue` — Specifies the text string to search for.
- `newValue` — Specifies the replacement text.

## Example XML File for Searching for and Replacing Multiple Text Strings

Here is an example of an XML file for searching for and replacing multiple text strings all at once:

```
- <commands>

  <action command="textReplace" oldValue="Analytics" newValue="Oracle Business
  Intelligence" />

  <action command="textReplace" oldValue="Markets. Region" new
  Value="Markets. CountryRegion" />

  <action command="renameColumn" oldValue="Region" new Value="CountryRegion" />

  <action command="renameSubjectArea" oldValue="SupplierSales" new
  Value="SupplySales" />

</commands>
```

## Searching for and Replacing Multiple Presentation Catalog Text Strings

Use the following procedure to search for and replace multiple Presentation Catalog text strings all at once.

### *To search for and replace multiple text strings*

- 1 Create the XML file for searching for and replacing multiple text strings. For more information, read ["About Searching for and Replacing Multiple Presentation Catalog Text Strings" on page 127](#).
- 2 In Catalog Manager, open the Presentation Catalog in offline mode.



- 3 Choose Tools > Search and Replace.
- 4 In the Import from File field, type the path or browse to the XML file you created in Step 1.
- 5 Click OK.

## Creating Reports to Display Presentation Catalog Data Using Catalog Manager

You can create reports to display Presentation Catalog data for the following object types:

- Requests
- Dashboards
- Segments
- Segment trees
- List formats

You can either display the report on the screen or save it to a file.

### *To create a report displaying Presentation Catalog data*

- 1 In Catalog Manager, open the Presentation Catalog. If you want to create a report showing the SQL that is sent to Oracle BI Presentation Services for the object, you must open the Presentation Catalog in online mode.
- 2 Choose Tools > Create Report.
- 3 Specify the columns to appear in the report in the Columns in Report list. Use the left and right arrow buttons (< and >) to move the columns between the Available Columns list and the Columns in Report list, and the plus and minus buttons (+ and -) to set the order in which columns will appear in the report.
- 4 To eliminate any rows that are exactly the same from the report, select the Distinct field.
- 5 In the Output the following section, specify which folders you want to output data from — either from all shared folders or from a specific path.
- 6 To save the report to a file, in the Save report to section, specify the pathname of the file as well as whether you want to overwrite the file or append the data to the file. (If the file does not already exist, it will be created.)
- 7 Click OK.

## Localizing Presentation Catalog Captions

If you need to localize text strings in the Presentation Catalog, you can export the text strings for translation and then expose them when translation is complete. You and your localization team are responsible for escaping characters properly and resolving any errors in the translated text strings.

**NOTE:** To export text strings, you must open the Presentation Catalog in offline mode.

The export process creates one XML file for every first-level subfolder in the shared folder, in the format `foldernameCaptions.xml`, where `foldername` is the name of the subfolder in the shared folder. Each XML file contains the text strings for all content in the corresponding first-level folder and its subfolders.

For example, if the shared folder in the Presentation Catalog contains the first-level folders Marketing, Service, and Sales, then the export process creates three XML files:

- MarketingCaptions.xml
- SalesCaptions.xml
- ServiceCaptions.xml
- After the content is translated, you place these folders in their corresponding location in the SADATADIR directory, where SADATADIR is the data directory:

SADATADIR\web\res\l\_xx\Captions

Their content loads when the service for Oracle BI Presentation Services starts.

### *To export Presentation Catalog text strings*

- 1 In Catalog Manager, open the Presentation Catalog in offline mode.
- 2 Choose Tools > Export Captions.
- 3 Browse to select the location in which to write the output, and then click OK.
- 4 To export only new text strings and those that have been changed since the last export, select Only export new or changed strings.
- 5 To exclude the Description properties from the export, select Exclude Descriptions.
- 6 Click OK.

The export process may take several minutes.

- 7 When the export process is complete, deliver the output file to your localization team.  
You may need to make a copy of every output file for each language to be translated.

### *To expose Presentation Catalog text strings*

- Place the translated XML files into their corresponding location in the SADATADIR directory, where SADATADIR is the data directory:

SADATADIR\web\res\l\_xx\Captions

where xx is the language extension.

The following table shows some examples of language extensions:

Language Extension	Language
cs	Czech
da	Danish
de	German
en	English
es	Spanish
fi	Finnish
fr	French
it	Italian
ja	Japanese
ko	Korean
nl	Dutch
pt	Portuguese
pt-br	Brazilian Portuguese
sv	Swedish
zh	Chinese (Simplified)
zh-tw	Chinese (Traditional)

For more information about supported languages, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

### ***To move translated captions from a development environment to a production environment***

- If the caption file:
  - Does *not* already exist in the production environment, simply copy it from the development environment to the production environment.
  - Does already exist in the production environment, first make a backup copy of the existing file. Then open the caption file in the production environment in a text editor or XML editing tool and manually (and very carefully) insert the changes that were made in the development environment.

## About Upgrading the Presentation Catalog to a Newer Version

You will need to upgrade your current Presentation Catalog with a newer version if your organization:

- Has prebuilt applications already installed, and
- Has customized the Presentation Catalog, and
- Receives a newer version of the Presentation Catalog

**NOTE:** If you made no changes to Presentation Catalog distributed with previous versions of prebuilt applications, you do not need to upgrade the catalog. You can begin using the newer version of the catalog.

Updating the Presentation Catalog makes use of three catalogs:

- The Original Presentation Catalog — This is the Presentation Catalog that you received with the currently-installed Oracle BI applications. It is also distributed at the root level of the installation CD-ROM as the folder OracleBI.
- The Current Presentation Catalog — This is the Presentation Catalog that is installed as the SADATADIR\web\catalog directory, where SADATADIR is the data directory.
- The Modified Presentation Catalog — This is the Presentation Catalog that you are currently using.

You use Catalog Manager to upgrade a Presentation Catalog. Catalog Manager compares the content in both the Current Presentation Catalog and the Modified Presentation Catalog with the content in the Original Presentation Catalog, merges any changes into the Current Presentation Catalog, and produces a list of upgrade differences, which you must resolve by indicating how you want the differences handled. If the Presentation Catalogs have conflicting content, you can choose which Presentation Catalog the content should be taken from. The end result is a merged Presentation Catalog that contains the site-specific changes, as well as new metadata.

For more information on how to upgrade a Presentation Catalog using Catalog Manager, see *Oracle Business Intelligence Applications Upgrade Guide*

## Archiving and Unarchiving a Presentation Catalog Using Catalog Manager

You can archive and unarchive an entire Presentation Catalog or an individual catalog folder in a Presentation Catalog. When you:

- Archive a Presentation Catalog (that is, the catalog root folder) or an individual catalog folder, all objects in the folder and the folder's subfolders are saved in single compressed file.
- Unarchive a Presentation Catalog or an individual catalog folder, the archive file is uncompressed and all objects in the folder and the folder's subfolders are then stored in the current offline catalog. Existing folders that have the same names as folders being unarchived are overwritten.

You also can use the Oracle BI Presentation Services Administration to archive a Presentation Catalog. (The unarchive functionality is available only in Catalog Manager.) For more information, see [“Archiving a Presentation Catalog” on page 109](#).

***To archive an entire Presentation Catalog or an individual catalog folder in the Presentation Catalog to a file you specify***

- 1** In Catalog Manager, open the Presentation Catalog in offline mode.
- 2** To archive:
  - The entire Presentation Catalog, choose File > Archive Catalog.
  - An individual catalog folder, right-click the catalog folder and choose Archive.
- 3** In the Archive File Path field, specify the pathname of the file in which to archive the Presentation Catalog or individual catalog folder.
- 4** If you want to archive the:
  - Timestamps that are assigned to the item and folder that you are archiving, select the Keep Timestamp checkbox.  
  
If you do not select this option, the archiving process will not include timestamp information. Upon unarchiving, the system will apply a timestamp indicating the time at which the item or folder is unarchived.
  - Permissions that are assigned to each item or folder, select the Keep Permissions checkbox.  
  
If you do not select this option, the archiving process will not include any permissions. Upon unarchiving, the system will assign the parent folder’s permissions to all of the items and folders.
- 5** Click OK.

***To archive an entire Presentation Catalog to the last used archive file***

- 1** In Catalog Manager, open the Presentation Catalog in offline mode.
- 2** Choose File > Quick Archive.

***To unarchive an entire Presentation Catalog or a catalog folder***

- 1** In Catalog Manager, open the Presentation Catalog in offline mode.
- 2** If you are unarchiving a catalog folder, navigate to the location where you want to unarchive the folder.
- 3** Choose File > Unarchive Catalog.
- 4** In the Archive File Path field, specify the pathname of the Presentation Catalog or catalog folder that you want to unarchive.
- 5** Click OK.



# 8

## Managing Oracle BI Presentation Services Security

This chapter explains how to set up Oracle BI Presentation Services security so that users have only:

- Access to items in the Presentation Catalog that are appropriate to them.
- The ability to perform actions that are appropriate to them.

Use this chapter if your organization uses the Oracle Business Intelligence infrastructure or if your organization uses prebuilt applications, but has created additional content outside of the applications.

This chapter contains the following topics:

- [Overview of Oracle BI Presentation Services Security on page 135](#)
- [Types of Presentation Services Groups on page 138](#)
- [Administering Presentation Services Groups on page 139](#)
- [About Oracle BI Presentation Services User Authentication on page 142](#)
- [About Presentation Services Groups and Session Variables on page 143](#)
- [Inheritance of Oracle BI Presentation Services Permissions and Privileges on page 145](#)
- [About Setting Oracle BI Presentation Services Permissions on page 147](#)
- [Overview of the Oracle BI Presentation Services Administration Screen on page 148](#)
- [Setting Permissions in Oracle BI Presentation Services Administration on page 150](#)
- [About Setting Oracle BI Presentation Services Privileges on page 152](#)
- [Setting Privileges in Oracle BI Presentation Services Administration on page 152](#)
- [Default Oracle BI Presentation Services Privilege Assignments on page 154](#)
- [Guidelines for Configuring Oracle BI Presentation Services Security for the Presentation Catalog and Dashboards on page 161](#)
- [About Authorizing Users to Act for Others on page 167](#)
- [Process of Authorizing Users to Act for Others on page 168](#)
- [Enabling User-Initiated Administration Actions on page 173](#)

## Overview of Oracle BI Presentation Services Security

This section provides an overview of Oracle BI Presentation Services security. It contains the following topics:

- [“Where Oracle BI Presentation Services Security Settings Are Made” on page 136](#)

- [“Differences Between Groups and Presentation Services Groups” on page 136](#)
- [“Your Security Goals in Oracle BI Presentation Services” on page 136](#)
- [“About Access Control and Permissions in Oracle BI Presentation Services” on page 137](#)
- [“About User Rights and Privileges in Oracle BI Presentation Services” on page 137](#)
- [“About User Authentication in Oracle BI Presentation Services” on page 138](#)

## Where Oracle BI Presentation Services Security Settings Are Made

Security settings that affect Oracle BI Presentation Services are made in the following Oracle Business Intelligence components:

- **Oracle BI Administration Tool.** This is where you perform the following tasks:
  - Set permissions for business models, tables, columns, and subject areas.
  - Specify database access for each user.
  - Specify filters to limit the data accessible by users.
  - Set authentication options.For more information, read *Oracle Business Intelligence Server Administration Guide*.
- **Oracle BI Presentation Services Administration.** This is where you set permissions to Presentation Catalog items, including dashboards, and the privilege to perform actions such as edit views, create iBots, and create prompts.
- **Catalog Manager.** This is where you set permissions to Presentation Catalog items, including dashboards. For more information about Catalog Manager, see [Chapter 7, “Managing Presentation Catalogs Using Oracle BI Catalog Manager.”](#)

## Differences Between Groups and Presentation Services Groups

Oracle Business Intelligence has both Groups and Presentation Services groups. Although similar, they do have some differences. Both types of groups are sets of security attributes that grant or deny privileges to sets of users. By grouping users together, you simplify the administration of these privileges:

- Groups apply privileges to Oracle BI Server objects.
- Presentation Services groups apply privileges to Oracle BI Presentation Services objects.

## Your Security Goals in Oracle BI Presentation Services

Your main security goals are to make sure that:

- Only appropriate people can log on and access Oracle BI Presentation Services. This is achieved by assigning logon rights and authenticating users through the Oracle BI Server. For more information about authentication, read [“About Oracle BI Presentation Services User Authentication” on page 142.](#)



- Employees can access only the data that is appropriate to them. This is achieved by applying access control in the form of permissions.
- Employees have the ability to perform only actions that are appropriate to them. This is achieved by applying user rights in the form of privileges.

You can set up Oracle Business Intelligence to use the single sign-on feature from the Web server. Oracle BI Presentation Services can use this feature when obtaining information for end users. For complete information on single sign-on, refer to the section on user authentication support in the *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*.

## About Access Control and Permissions in Oracle BI Presentation Services

Access control defines the ability of an account to access a shared Presentation Catalog item. Catalog items are folders and requests, where folders are application folders, dashboard folders, and dashboard page folders.

An account is one of the following:

- An individual user.
- A Presentation Services group that has one or more users as members.

Permissions describe the type of access to an object that an account is permitted. Examples are Read and Full Control.

Each Presentation Catalog item has an access control list that defines which accounts have which permissions to access the item. The access control list is stored in the item's corresponding attribute (.atr) file. An access control list has the general form shown in [Table 14](#).

Table 14. Access Control List for a Catalog Item

Account	Permission
Presentation Services Group 1	Read
Presentation Services Group 3	Full Control
Presentation Services Group 8	Read
User 4	Read
User 9	Full Control
User 11	Full Control

For more information about permissions, read [“About Setting Oracle BI Presentation Services Permissions” on page 147](#).

## About User Rights and Privileges in Oracle BI Presentation Services

Privileges are the actions that users have the right to perform in Oracle BI Presentation Services. Example privileges are “Edit system-wide column formats” and “Create iBots.”

Privileges are managed by associating them with accounts, that is, individual users or Presentation Services groups. A specific account is either granted or denied a specific privilege. These associations are created in privilege assignment tables.

The general form of a privilege assignment table is shown in [Table 15 on page 138](#). The Presentation Services groups in the right column are granted the privileges in the left column.

Table 15. Privilege Assignment Table

Privilege	Accounts That Have Been Granted the Privilege
Privilege 1	Presentation Services Group 2, Presentation Services Group 4
Privilege 2	Presentation Services Group1, Presentation Services Group 3
Privilege 3	Presentation Services Group 1, user 3
Privilege 4	Presentation Services Group 1, user 1, user 4, user 6
Privilege 5	Presentation Services Group 2, Web Group 3, user 4

For more information about privileges, read [“About Setting Oracle BI Presentation Services Privileges” on page 152](#).

### About User Authentication in Oracle BI Presentation Services

Authentication is the process of using a username and password to identify a someone who is logging on. Authenticated users are then given appropriate authorization to access a system, in this case Oracle BI Presentation Services. Oracle BI Presentation Services does not have its own authentication system; it relies on the authentication system built into the Oracle BI Server.

For more information about authentication, read [“About Oracle BI Presentation Services User Authentication” on page 142](#).

## Types of Presentation Services Groups

Presentation Services groups are defined by the system or by an Oracle Business Intelligence administrator. When a user is assigned to a Presentation Services group, the user becomes a member of that group. Presentation Services group membership is used to determine the permissions and privileges that are associated with a user, either by explicit assignment or inheritance.

Presentation Services groups can also be thought of as roles for users because they avoid ambiguity about which defaults, preferences, and so on, to assign directly to the user.

This section contains the following topics:

- [“System-Defined Presentation Services Groups in Oracle BI Presentation Services” on page 139](#)
- [“Administrator-Defined Presentation Services Groups in Oracle BI Presentation Services” on page 139](#)

## System-Defined Presentation Services Groups in Oracle BI Presentation Services

System-defined Presentation Services groups are preconfigured and required for successful Oracle BI Presentation Services operations. There are two types of system-defined Presentation Services groups:

- **Everyone.** By default, all users belong to the Everyone group. This is why the group does not appear on the Groups and Users screen of the application.
- **Oracle BI Presentation Services Administrators.** Members of the Oracle BI Presentation Services Administrators group are users who are Oracle BI Presentation Services administrators. The default member of this group is the Oracle BI Presentation Services Administrator. By default, only members of the Oracle BI Presentation Services Administrators group have access to administrative functions, but this can be changed by changing privilege assignments.

## Administrator-Defined Presentation Services Groups in Oracle BI Presentation Services

Administrator-defined Presentation Services groups are created by the Oracle BI Presentation Services administrator. You can create an unlimited number of Presentation Services groups in Oracle BI Presentation Services.

**NOTE:** For organizations that have prebuilt applications, preconfigured groups are set up with preconfigured responsibilities. For more information, see the documentation for the application.

The Presentation Services groups that you define should be used to categorize users who require similar access to dashboards and content. You should plan your Presentation Catalog folder structure and Presentation Services groups together to create a coherent security model. For guidelines, read [“Guidelines for Configuring Oracle BI Presentation Services Security for the Presentation Catalog and Dashboards” on page 161](#). For more information about how Presentation Services group membership can be passed from the Oracle BI Server, read [“About Oracle BI Presentation Services User Authentication” on page 142](#).

# Administering Presentation Services Groups

In Oracle BI Presentation Services Administration, you can use the Presentation Catalog Security: Groups and Users screen to:

- Create a Presentation Services group
- Delete a Presentation Services group or user from Oracle BI Presentation Services
- Add a Presentation Services group or user to an existing group
- Delete a Presentation Services group or user from an existing group

### *To access the Presentation Catalog Security: Groups and Users screen*

- 1 Log in to Oracle BI Presentation Services.

- 2 Choose Settings > Administration.
- 3 Click the Manage Presentation Catalog Groups and Users link.

### *To create a Presentation Services group*

- 1 In the Existing Catalog Groups and Users area, click the Create a new Catalog Group link.

The Create Catalog Group screen appears.

- 2 Enter a name for the group in the Group Name field.

**NOTE:** If you leave the Group Name field empty, Oracle BI Presentation Services cannot create a Presentation Services group folder.

The name of the Presentation Services group must not match the name of any user who logs in to Oracle BI Presentation Services. This match is not case sensitive. For example, the user name FOO2 matches the Presentation Services group named foo2 or FoO2. If a user and a Presentation Services group share the same name, the user receives an Invalid Account message when attempting to log on to Oracle BI Presentation Services.

**NOTE:** If the name of an Oracle BI Server group (which is set up in the Oracle BI Administration Tool) matches the name of a Presentation Services group, members of the Oracle BI Server group automatically become members of the Presentation Services group when they log on to Oracle BI Presentation Services. Their membership ceases when they log off. The name of the user never appears to an Oracle BI Presentation Services administrator as a member of the Presentation Services group. If you prefer to use Presentation Services group names that match Oracle BI Server group names, but want users to be viewable as members of the group, with persistent group membership, you must explicitly add the users to the Presentation Services group using the Presentation Catalog Security: Groups and Users screen.

- 3 In the Dashboard Name field, type a name for the dashboard.

You can assign an existing dashboard to the Presentation Services group or create a new dashboard for the Presentation Services group. Whichever option you choose, all members of the Presentation Services group are granted Read access to the designated, default dashboard. If you do not want to create a dashboard now, you can create one later from the Manage Dashboards screen.

If you do create a new, empty dashboard, it is created within a new, like-named shared folder. Group members will have Read permission to this folder.

- 4 In the Dashboard Builder field, specify the names of the users or groups that are to have permission to change the contents of the dashboard. Separate multiple entries with a comma, for example, user1, sal esgroup.

- 5 Click Finished.

**NOTE:** When you create a Presentation Services group and create a name for the group, Oracle BI Presentation Services creates a group folder in the Presentation Catalog. All members of the Presentation Services group have Read permissions to this folder. For manually created group folders, you should set the permissions to the Group folder for the appropriate groups to Read.

### *To delete a Presentation Services group or user from Oracle BI Presentation Services*

- 1 In the Existing Catalog Groups and Users area, in the Catalog Groups and Users table, locate the group or user and click the associated Delete icon.

To help you locate the group or user you want, you can:

- Show only groups in the Catalog Groups and Users table by using the Show users and groups toggle
- Search for a Presentation Services group or user to add using the Search field

- 2 Click Yes to confirm the delete.

- 3 Click Finished.

**NOTE:** This procedure does not delete any group definitions or any user definitions in an Oracle BI repository. If the user logs on again, his or her Oracle BI Presentation Services entry is recreated. To completely delete a user, delete the user's folder using Catalog Manager.

### *To add a Presentation Services group or user to an existing group*

- 1 In the Existing Catalog Groups and Users area, in the Catalog Groups and Users table, locate the group that you want to add a Presentation Services group or user to and click the associated Edit icon.

To help you locate the group or user you want, you can:

- Show only groups in the Catalog Groups and Users table by using the Show users and groups toggle
- Search for a Presentation Services group or user to add using the Search field

The Edit Catalog Group screen appears.

- 2 In the Group Membership area, click the Add New Member link.

The Add Member to Group screen appears.

- 3 Locate the user or group to add and click the associated Add link.

The Edit Catalog Group screen appears.

The Group Membership area now shows the list of the current members of the group.

- 4 Click Finished.

### *To delete a Presentation Services group or user from an existing group*

- 1 In the Existing Catalog Groups and Users area, in the Catalog Groups and Users table, locate the group that you want to delete a Presentation Services group or user to and click the associated Edit icon.

To help you locate the group or user you want, you can:

- Show only groups in the Catalog Groups and Users table by using the Show users and groups toggle

- Search for a Presentation Services group or user to add using the Search field

The Edit Catalog Group screen appears.

- 2 In the Group Membership area, in the Members table, locate a member and click the Remove icon.
- 3 Click Finished.

**NOTE:** You cannot delete system-defined Presentation Services groups or the user name Administrator.

## About Oracle BI Presentation Services User Authentication

When users log on, they are authenticated by the Oracle BI Server using the authentication method specified in the Oracle BI Server configuration file NQSSConfig.INI. For more information about NQSSConfig.INI, see *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*.

This section briefly describes the authentication methods that are relevant to Oracle BI Presentation Services users, in the context of Oracle BI Presentation Services. It contains the following topics:

- [“Oracle Business Intelligence LDAP or ADSI Authentication” on page 142](#)
- [“Oracle Business Intelligence External Table Authentication” on page 143](#)
- [“Oracle Business Intelligence Database Authentication” on page 143](#)
- [“Oracle Business Intelligence Internal Authentication” on page 143](#)

For detailed information about authentication options, read *Oracle Business Intelligence Server Administration Guide*.

### Oracle Business Intelligence LDAP or ADSI Authentication

If you are using LDAP or ADSI authentication to provide Oracle BI Server access control, you may also configure your LDAP or ADSI server to provide other security information. For example, you could configure the name that is displayed in the Welcome text when the user logs on to Oracle BI Presentation Services, and is specific to the Presentation Services groups to which the user belongs. This information is contained in LDAP variables, which are passed to the Oracle BI Server session variables during the process of user authentication.

The variable USER is a system session variable that is used with LDAP or ADSI authentication. Whenever users log on to Oracle BI Presentation Services, their usernames and passwords are passed to the LDAP or ADSI server for authentication. After successful authentication, other system or non-system session variables for each user can be populated from information returned by the LDAP or ADSI server.

For more information about session variables, read [“About Presentation Services Groups and Session Variables” on page 143](#).

## Oracle Business Intelligence External Table Authentication

If you are using an external database table for authentication, the table can contain additional access control information. This includes the name that is displayed in the Welcome text when the user logs on to Oracle BI Presentation Services, and the Oracle BI Server group and the Presentation Services groups to which the user belongs.

Whenever users log in, their usernames and passwords are authenticated through SQL that queries this database table for authentication. After successful authentication, the results of this SQL query can be used to populate other system and non-system session variables for each user.

For more information about session variables, read [“About Presentation Services Groups and Session Variables” on page 143](#).

## Oracle Business Intelligence Database Authentication

The Oracle BI Server can authenticate users through database logons. When a user attempts to log on to Oracle BI Presentation Services, the Oracle BI Server attempts to use the logon name and password to connect to the authentication database, using the first connection pool associated with it. If this connection succeeds, the user is considered to be authenticated successfully.

Database authentication provides no mechanism to return additional access control information, such as the user's display name or Presentation Services group membership. If you are using database authentication, alone or in conjunction with external table authentication, you need to explicitly add users to the appropriate Presentation Services group.

**NOTE:** Delivers does not work with database authentication. For more information, read [“About Delivers iBots and Impersonation” on page 67](#).

## Oracle Business Intelligence Internal Authentication

The Oracle BI Server internal authentication method has no way to return additional access control information. If you are using Oracle BI Server internal authentication, you need to explicitly add users to the appropriate Presentation Services group, because the GROUP variable is not used with internal authentication.

# About Presentation Services Groups and Session Variables

If the Oracle BI Server is using an external table or LDAP server for authentication, you must configure system session variables in the repository.

A session variable block contains the SQL statement that is issued when each session begins. This block can contain system session variables with fixed meanings (such as USER, GROUP, DISPLAYNAME, and WEBGROUP) and other non-system session variables unique to your particular environment. For more information about using session variables, read *Oracle Business Intelligence Server Administration Guide*.

You should also create a Presentation Services group to match each possible value returned in the GROUP or WEBGROUPS variable for which you want to control privileges and permissions to Oracle BI Presentation Services components and requests.

This section contains the following topics:

- [“About the Oracle Business Intelligence GROUP Session Variable” on page 144](#)
- [“About the Oracle Business Intelligence WEBGROUPS Session Variable” on page 144](#)
- [“Setting Permissions and Privileges in Oracle BI Presentation Services” on page 144](#)

## About the Oracle Business Intelligence GROUP Session Variable

The GROUP variable contains one or more group names, separated by semicolons, that are also used by the Oracle BI Server for security and content filtering. In many cases, these same groups are sufficient to control access to Oracle BI Presentation Services content. Prebuilt applications have been preconfigured to use this GROUP variable technique to inherit group memberships from the Oracle BI Server.

## About the Oracle Business Intelligence WEBGROUPS Session Variable

The WEBGROUPS session variable has greater flexibility, because you can define Presentation Services groups that categorize the roles, or classes, of Oracle BI Presentation Services users. For example, you might create the following groups:

- A Basic group that can only access the dashboard.
- A Standard group that has minimal access to Answers.
- A Power Users group that has full access to Answers and minimal access to iBots (Delivers).
- An Administrative group with full access to all features.

Then use the privileges settings to set up the appropriate policies for each group. Keep in mind that each user can be associated with multiple “roles” by being a member of multiple Presentation Services groups.

## Setting Permissions and Privileges in Oracle BI Presentation Services

When you have set up the Presentation Services groups, create a Presentation Catalog folder structure and assign appropriate privileges and permissions to each group. Keep in mind that each user can be associated with multiple roles by being a member of multiple Presentation Services groups. Although WEBGROUPS can be used to control access to Presentation Catalog content (permissions), usually GROUP controls content and WEBGROUPS controls the ability to perform actions (privileges).

**NOTE:** Some GROUPs may not have corresponding Oracle BI Presentation Services content. In this case, when you create the group, you can delete the group folder created for the group in the / Shared folder, and give the group permission to the other group folders and subject area folders as appropriate.

For more information about the sequence in which to set up security, read [“Guidelines for Configuring Oracle BI Presentation Services Security for the Presentation Catalog and Dashboards” on page 161](#).



For more information about permissions, read [“About Setting Oracle BI Presentation Services Permissions” on page 147](#).

For more information about privileges, read [“About Setting Oracle BI Presentation Services Privileges” on page 152](#).

## Inheritance of Oracle BI Presentation Services Permissions and Privileges

Permissions and privileges can be assigned to users directly or through membership in groups. From another perspective, permissions and privileges can be assigned explicitly or effectively. Effective permissions and privileges are assigned indirectly through Presentation Services group inheritance, which is the recommended way to set up your security. Permissions and privilege inheritance occurs when one Presentation Services group is a member of another Presentation Services group.

This section contains the following topics:

- [“Rules for Inheritance in Oracle BI Presentation Services” on page 145](#)
- [“Example of Inherited Privileges in Oracle BI Presentation Services” on page 146](#)

### Rules for Inheritance in Oracle BI Presentation Services

- Any permissions or privileges given explicitly to a user override any permissions or privileges inherited from the Presentation Services group to which the user belongs.
- If a user belongs to two groups and both groups are assigned permissions, the least restrictive permissions are given to the user.

For example, if one group allows Read access and another allows Change access, the least restrictive access would be granted; in this example, Change access.

**NOTE:** The exception to this is if one of the two groups is explicitly denied the permissions, in which case the user is denied.

- If a user belongs to Presentation Services group X, and Presentation Services group X belongs to Presentation Services group Y, any rule assigned to group X overrides any rule assigned to group Y.

For example, if Marketing has Read permissions, Marketing Administrators, which is a member of Marketing, can have Full Control permissions.

- Explicitly denying access takes precedence over any other permissions or privileges.

When assigning permissions or privileges it is often useful to look at resolved permissions for users and groups at the bottom of the screen to make sure that everyone is inheriting correctly.

## Example of Inherited Privileges in Oracle BI Presentation Services

Figure 1 shows an example of how privileges are inherited through Presentation Services groups.

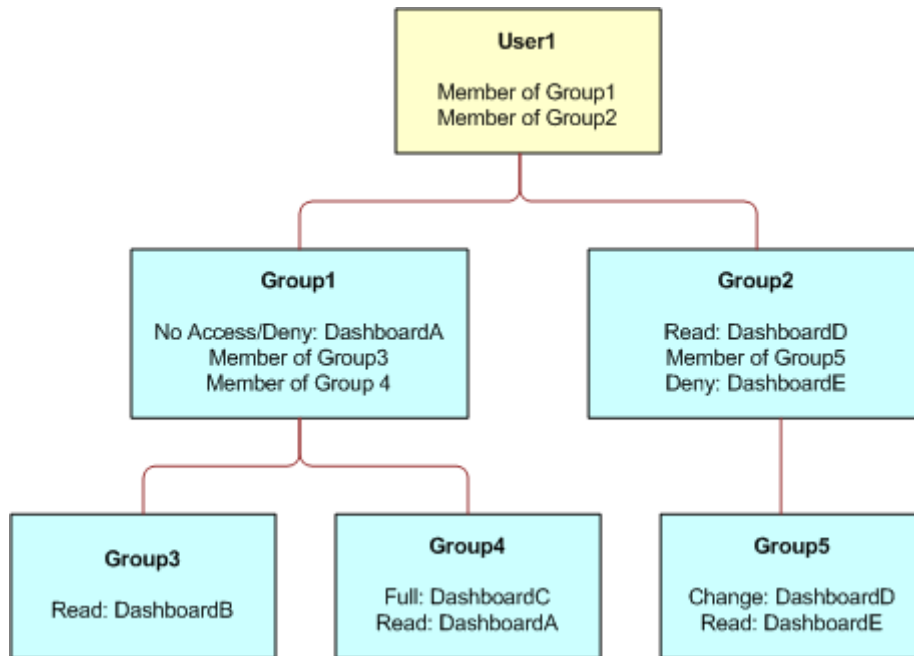


Figure 1. Example of Presentation Services Group Privilege Inheritance

In this example:

- User1 is a direct member of Group 1 and Group 2, and is an indirect member of Group 3, Group 4, and Group 5.
- The permissions and privileges from Group 1 are no access to DashboardA, Read access to DashboardB, and Full Control over DashboardC.
- If permissions and privileges are conflicting, the least restrictive level of authority is granted. Therefore, the inherited permissions and privileges from Group 2 include Change and Delete access to DashboardD.
- Specifically prohibiting access always takes precedence over any other settings. Therefore, Group 1's denial of access to DashboardA overrides Group 4's Read access. The result is that Group 1 provides no access to DashboardA. Likewise, Group 5 provides no access to DashboardE because access to it is explicitly denied in Group2.

The total permissions and privileges granted to User1 are as follows:

- No access to DashboardA and DashboardE because access is specifically denied.
- Read access to DashboardB.
- Full Control over DashboardC.

- Change and Delete access to DashboardD.

**TIP:** Do not add the default Everyone Presentation Services groups to any other Presentation Services groups that you create. This makes sure that only the desired Presentation Services groups (and users) have the specified permissions and privileges, by preventing users or authenticated users from unintentionally inheriting permissions and privileges from another Presentation Services group.

## About Setting Oracle BI Presentation Services Permissions

Permissions are used to control access to shared information contained in:

- Presentation Catalog items
- Dashboards

Permissions, which may be explicitly set or inherited, are configured from:

- The Oracle BI Presentation Services Administration screen
- Catalog Manager

For more information about Catalog Manager, see [Chapter 7, “Managing Presentation Catalogs Using Oracle BI Catalog Manager.”](#)

You can set permissions from the level of the application all the way down to individual requests in either Oracle BI Presentation Services or the Presentation Catalog.

This section contains the following topics:

- [“Types of Permissions in Oracle BI Presentation Services” on page 147](#)
- [“Recommendations for Setting Permissions in Oracle BI Presentation Services” on page 148](#)

### Types of Permissions in Oracle BI Presentation Services

Oracle BI Presentation Services supports the following permissions:

- **Change/Delete.** Authority given to view content, and make changes or delete the content.
- **Full Control.** Authority given to view content, make changes or delete the content, set permissions, and delete the item, folder, or dashboard.
- **No Access.** Access is not allowed for this user or group. Explicitly denying access takes precedence over any other permission.
- **Read.** Authority given to view the contents of the item, folder or dashboard, but cannot make any changes.
- **Traverse Folder.** Authority to access objects in folders within the selected folder when the user does not have permission to the selected folder. Example: The user is granted Traverse Folder permission to the /shared/test folder. The user cannot access objects in the /shared/test folder, but can access objects stored in lower-level folders, such as /shared/test/guest.

## Recommendations for Setting Permissions in Oracle BI Presentation Services

Follow these recommendations when setting permissions:

- Assign permissions through Presentation Services group membership, even if you want to assign permissions for a single user. For more information, read [“Types of Presentation Services Groups” on page 138](#).
- Set the permission to the Group folder for the appropriate groups to Read.
- For groups (or users, if necessary) that are going to be modifying the dashboards and dashboard content accessible to the group, set the permissions for the group to Full Control. This is often a dashboard or content builder group. While allowing change and delete control, Full Control also allows the specified group (or user) to set permissions, and to delete the item, folder, or dashboard.

If you plan to have numerous or varying users creating and modifying dashboard content for a given group, create a separate, corresponding “builder” group that has all the back-end permissions of the primary group, but with a different name. For example, you could create a Sales group and a SalesBuilder group. By giving the SalesBuilder group appropriate permissions to the Presentation Catalog, you can control and change who can make changes to dashboards and content. Assuming session variable security is in place, you could make a user a dashboard builder or content creator by changing the user’s group from “Sales” to “SalesBuilder” in the database table that holds security information.

- For each Subject Area, grant Read permissions to the corresponding Subject Area folder within the Requests folder (and everything it contains). Make sure that the Everyone group has no access permission to the Subject Area folder.
- For groups that should be able to save requests for public use against a given Subject Area, grant them Full Control to the Subject Area folder and everything it contains, and likewise for the Common folder. For more information on setting permissions, see [“Setting Permissions in Oracle BI Presentation Services Administration” on page 150](#).
- To make sure that only members of the designated Presentation Services groups (or users) have access to Presentation Catalog folders, folder content, and Dashboards, do not set explicit permissions for the default Presentation Services group Everyone.

**NOTE:** Oracle BI Presentation Services does not allow you to remove permissions for yourself or for the administrator. This prevents you from locking yourself out of an item, folder, or dashboard.

**TIP:** To provide a place for all users within a group to share requests with each other, create a folder under the Subject Area folder called, for example, Share or Publish, and give the entire group Change/Delete permission to just that folder.

## Overview of the Oracle BI Presentation Services Administration Screen

The Oracle BI Presentation Services Administration screen contains the following sections:

- **Product Information.** This section provides information about your current installation, such as the product version in use, the path to the current Presentation Catalog, and a link to a list of features licensed by your organization.

In Windows, the following information also is shown:

- **Available Paging Memory.** The amount of physical memory remaining plus any paging memory remaining
- **Available Virtual Address Space.** The amount of virtual address space remaining to process

(If either of these values is very low, then Oracle BI Presentation Services may run out of memory.)

- **Activities.** This section provides links to administrative functions. [Table 16](#) lists and describes the links in the Activities section.

**NOTE:** The Activities section may also contain links for other Siebel applications from Oracle that your organization has licensed, such as Oracle's Siebel onDemand or Siebel Marketing. Such links are not listed in [Table 16](#). For information about an application-specific link, click Help (if present) on the screen that opens when you click the link, or consult the administrator documentation for the application.

Table 16. Description of Links in the Activities Section in Oracle BI Presentation Services Administration

Link	Description
Manage Presentation Catalog Groups and Users	Opens the Presentation Catalog Security: Groups and Users screen, where you can control access to Oracle BI Presentation Services for both Presentation Services groups and individual users.
Manage Presentation Catalog	Opens the Manage Catalog screen, where you can edit, rename, set permissions for, and delete folders and items in the Presentation Catalog. This feature can also be accessed by clicking the Manage Catalog button in the left pane in Answers.
Manage Interactive Dashboards	Opens the Manage Dashboards screen, where you can administer dashboard security. Depending on the level of authority granted to you based on the user name you log on with, you can use this screen to create and delete dashboards, and access the screens to change user and group permissions to dashboards and to change the properties of dashboards.
Manage Sessions	Opens the Session Management screen, where you can manage active sessions, such as canceling running requests and viewing the log file NQQuery.log for information about a request.
Manage iBot Sessions	Opens the iBot Session Management screen, where you can view information about currently active iBot sessions.

Table 16. Description of Links in the Activities Section in Oracle BI Presentation Services Administration

Link	Description
Manage BI Publisher	<p>Opens the Oracle Business Intelligence Publisher Administration URL, where you can manage BI Publisher users, permissions, jobs, and files and folders.</p> <p>(The BI Publisher Administration URL is set in the AdvancedReporting/AdminURL element in the Oracle BI Presentation Services configuration file (instanceconfig.xml).)</p> <p>For more information about Oracle BI Publisher, see <i>Oracle Business Intelligence Publisher User's Guide</i>.</p>
Manage Privileges	Opens the Privilege Administration screen, where you can manage privileges and rights for both Presentation Services groups and individual users to various Oracle BI Presentation Services features and functions.
Manage Device Types	Opens the Manage Device Types screen, where you can manage device types for device categories supported by Delivers.
Issue SQL	Opens the Issue SQL Directly screen, where you can enter an SQL statement to be issued directly to the Oracle BI Server. This feature is useful for testing the server only. Results are not formatted, and it is not possible to save the SQL issued here as a request.
Toggle Maintenance Mode	Toggles Maintenance Mode on and off. (When Maintenance Mode is on, users cannot write to the Presentation Catalog.)
Reload Files and Metadata	Reloads XML message files, refreshes server metadata, and clears Oracle BI Presentation Services caches.

## Setting Permissions in Oracle BI Presentation Services Administration

Using the Change Item Permissions screen in Oracle BI Presentation Services Administration, you can, for Presentation Catalog items such as dashboards, dashboard pages, folders, and so on:

- Change the explicit permissions granted to Presentation Services groups and users
- Add explicit permissions for Presentation Services groups and users

### To access the Change Item Permissions screen

- Follow the appropriate steps for the item for which you want to set permissions:

To access the Change Permissions screen for:	Do this:
A dashboard	<ol style="list-style-type: none"> <li>1 Log in to Oracle BI Presentation Services.</li> <li>2 Choose Settings &gt; Administration.</li> <li>3 Click the Manage Interactive Dashboards link.</li> <li>4 Click the Permissions icon associated with the dashboard whose permissions you want to change.</li> </ol>
A dashboard page	<ol style="list-style-type: none"> <li>1 Log in to Oracle BI Presentation Services.</li> <li>2 Choose Settings &gt; Administration.</li> <li>3 Click the Manage Interactive Dashboards link.</li> <li>4 Select a dashboard and click Properties.</li> <li>5 In the Dashboard Pages area, click the Page Security icon associated with the dashboard page whose permissions you want to change.</li> </ol>
Any other Presentation Catalog item	<ol style="list-style-type: none"> <li>1 Log in to Oracle BI Presentation Services.</li> <li>2 Choose Settings &gt; Administration.</li> <li>3 Click the Manage Presentation Catalog link.</li> <li>4 Click the Permissions icon associated with the item whose permissions you want to change. Note that you may need to click a folder link and drill down to the item.</li> </ol>

### To change explicit permissions

- 1 In the Users and groups with explicit access to this item table:
  - If you want to change the permission granted to a Presentation Services group or user, click the permission associated with the Presentation Services group or user and toggle to the permission that you want.  
The toggle proceeds in a ring from **No Access** > **Traverse Folder** > **Read** > **Change/Delete** > **Full Control**.
  - If you want to remove the explicit permission, click the Remove permissions for user/group icon associated with the Presentation Services group or user.
- 2 Click the Replace permissions with parent folder's permissions link, if appropriate.
- 3 Select one or both of the following options, as appropriate:
  - Apply permissions to sub-folders

- Apply permissions to items within folder

4 Click Finished.

### *To add explicit permissions*

1 In the Additional groups Add Explicit Permissions table, locate the Presentation Services group or user for whom you want to assign explicit permissions to the item and click the associated Add link.

To help you locate the group or user you want, you can:

- Show only users in the Additional groups Add Explicit Permissions table, by using the Show users and groups toggle
- Search for a Presentation Services group or user to add using the Search field
- Show effective (that is, inherited) permissions in the Additional groups Add Explicit Permissions table by selecting the Show effective permissions checkbox.

2 (Optional) In the Users and groups with explicit access to this item table, toggle to the type of permission you want to assign to the group or user you just added.

3 Click Finished.

## About Setting Oracle BI Presentation Services Privileges

Privileges are the actions that users have the right to perform in Oracle BI Presentation Services. They are managed by associating them with accounts, that is, individual users or Presentation Services groups. A specific account is either granted or denied a specific privilege. These associations are created in privilege assignment tables.

Like permissions, privileges are either explicitly set or inherited through group membership. Explicitly denying a privilege takes precedence over any granted, inherited privilege. For example, if a user is explicitly denied access to the privilege to edit column formulas in Answers, but is a member of a group that has inherited the privilege, the user cannot edit column formulas.

Unlike permissions, privileges are more commonly granted to the Everyone system Presentation Services group. This allows users access to common Oracle BI Presentation Services features and functions.

For a list of some Oracle BI Presentation Services privileges, read [“Default Oracle BI Presentation Services Privilege Assignments”](#) on page 154.

## Setting Privileges in Oracle BI Presentation Services Administration

Using the Change Privilege Permissions screen in Oracle BI Presentation Services Administration, you can:



- Change a user's or group's explicit access to a privilege
- Add explicit access to a privilege to a user or group

### *To access the Change Privilege Permissions screen*

- 1 Log in to Oracle BI Presentation Services.
- 2 Choose Settings > Administration.
- 3 Click the Manage Privileges link to display the Privilege Administration screen.
- 4 Click the link for the users and groups associated with the privilege for which you want to change explicit access.

### *To change explicit access to a privilege*

- 1 In the Users and groups with explicit access to this Privilege table:
  - If you want to change the access to a privilege for a Presentation Services group or user, click the permission associated with the Presentation Services group or user and toggle to the permission that you want - either **Granted** or **Denied**.
  - If you want to remove the explicit permission, click the Remove permissions for user/group icon associated with the Presentation Services group or user.
- 2 Click Finished.

### *To add explicit access to a privilege*

- 1 In the Additional groups Add Explicit Permissions table, locate the Presentation Services group or user whom you want to assign explicit access to the privilege and click the associated Add link.

To help you locate the group or user you want, you can:

  - Show only users in the Additional groups Add Explicit Permission table, by using the Show users and groups toggle
  - Search for a Presentation Services group or user to add using the Search field
  - Show effective (that is, inherited) permissions in the Additional groups Add Explicit Permission table by selecting the Show effective permissions checkbox.
- 2 (Optional) In the Users and groups with explicit access to this Privilege table, toggle to the permission you want to assign to the group or user you just added.
- 3 Click Finished.

**NOTE:** By default, a user who creates an item has the permission to change it. However, in some cases, this privilege should be disabled. Make the appropriate changes to deny the target user or group access to the Admin: Catalog Change Permissions privilege.

## Default Oracle BI Presentation Services Privilege Assignments

Table 17 lists some privileges that can be controlled, along with the Presentation Services group that is granted access to that privilege by default.

These privileges apply to the Oracle Business Intelligence infrastructure. If your organization uses prebuilt applications, some privileges may be preconfigured. For more information, see the documentation for the application.

**NOTE:** The Privilege Administration screen may also contain privileges for other Siebel applications from Oracle that your organization has licensed, such as Oracle's Siebel Marketing. Presentation Services groups granted permission to application-specific components have descriptive names, such as Marketing Analytics User. For information about application-specific privileges, read the administrator documentation for the application.

Table 17. Privileges and Default Settings for the Oracle Business Intelligence Infrastructure

Component	Privilege	Description	Presentation Services Group Granted Permission
Access	Access to Dashboards		Everyone
	Access to Answers		Everyone
	Access to Delivers		Everyone
	Access to Briefing Books		Everyone
	Access to Disconnected Analytics		Everyone
	Access to Administration		Presentation Services Administrators
	Access to Segments		Everyone
	Access to Segment Trees		Everyone
	Access to List Formats		Everyone
	Access to Oracle BI Publisher Enterprise	Shows the More Products > BI Publisher link, which lets users launch BI Publisher.  For more information about Oracle BI Publisher, see <i>Oracle Business Intelligence Publisher User's Guide</i> .	Everyone

Table 17. Privileges and Default Settings for the Oracle Business Intelligence Infrastructure

Component	Privilege	Description	Presentation Services Group Granted Permission
Admin: Catalog	Change Permissions		Everyone
	Toggle Maintenance Mode		Everyone

Table 17. Privileges and Default Settings for the Oracle Business Intelligence Infrastructure

Component	Privilege	Description	Presentation Services Group Granted Permission
Admin: General	Manage Sessions		Presentation Services Administrators
	Manage Dashboards		Presentation Services Administrators
	See Session IDs		Presentation Services Administrators
	Issue SQL Directly		Presentation Services Administrators
	View System Information		Presentation Services Administrators
	Performance Monitor		Presentation Services Administrators
	Manage iBot Sessions		Presentation Services Administrators
	Manage Device Types	Shows the Manage Device Types link on the Oracle BI Presentation Services Administration screen, which opens the Manage Device Types screen.	Presentation Services Administrators
	Manage Marketing Jobs		Presentation Services Administrators
	Manage Marketing Defaults		Presentation Services Administrators
	Manage BI Publisher	Shows the Manage BI Publisher link on the Oracle BI Presentation Services Administration screen, which opens the Oracle Business Intelligence Publisher Administration URL.  For more information about Oracle BI Publisher, see <i>Oracle Business Intelligence Publisher User's Guide</i> .	Presentation Services Administrators

Table 17. Privileges and Default Settings for the Oracle Business Intelligence Infrastructure

Component	Privilege	Description	Presentation Services Group Granted Permission
Admin: Security	Manage Catalog Groups and Users		Presentation Services Administrators
	Manage Privileges		Presentation Services Administrators
	Take Ownership of Catalog Objects		Presentation Services Administrators
Briefing Book	Add To or Edit a Briefing Book		Everyone
	Download Briefing Book		Everyone
Catalog	Personal Storage (My Folders and My Dashboard)		Everyone
	Reload Metadata		Presentation Services Administrators
	See Hidden Items		Everyone
	Create Folders		Everyone
	Archive Catalog		Presentation Services Administrators
Dashboards	Save Selections		Everyone
	Assign Default Selections		Everyone
Formatting	Save system-wide column formats		Presentation Services Administrators
My Account	Access to My Account		Everyone
	Change Preferences		Everyone
	Change Delivery Options		Everyone

Table 17. Privileges and Default Settings for the Oracle Business Intelligence Infrastructure

Component	Privilege	Description	Presentation Services Group Granted Permission
Answers	Create Views		Everyone
	Create Prompts		Everyone
	Access Advanced Tab		Everyone
	Edit column formulas		Everyone
	Edit column filters		Everyone
	Enter XML and logical SQL		Everyone
	Edit Direct Database Requests		Presentation Services Administrators
	Create advanced filters and set operations		Everyone
	Save filters		Everyone
	Execute Direct Database Requests		Administrators
Delivers	Retrieve delivery destinations for iBots (system call)		Presentation Services Administrators, Administrators
	Create iBots		Everyone
	Publish iBots for subscription		Everyone
	Deliver iBots to specific or dynamically determined users		Presentation Services Administrators, Administrators
	Chain iBots		Everyone
	Chain iBots to custom scripts		Presentation Services Administrators, Administrators
	See iBot Instance Errors		Presentation Services Administrators, Administrators
	Modify current subscriptions for iBots		Presentation Services Administrators, Administrators
Proxy	Act As Proxy		Administrators

Table 17. Privileges and Default Settings for the Oracle Business Intelligence Infrastructure

Component	Privilege	Description	Presentation Services Group Granted Permission
RSS Feeds	Access to RSS Feeds	Grants the right to receive RSS feeds with alerts and contents of folders.  If the Oracle BI Presentation Services uses the HTTPS protocol, the RSS Reader that you use must also support the HTTPS protocol.	Everyone
Oracle BI Publisher Enterprise  For more information about Oracle BI Publisher, see <i>Oracle Business Intelligence Publisher User's Guide</i> .	Add BI Publisher Reports to Dashboard	Shows the BI Publisher Report object in the Dashboard Objects area on the Dashboard Editor screen, which allows dashboard developers to add BI Publisher reports to dashboard pages.	Everyone
	View BI Publisher Reports	Allows users to view BI Publisher reports on dashboard pages.	Everyone
	Schedule BI Publisher Reports	Shows the Schedule button for BI Publisher reports on dashboard pages.	Everyone
	Send BI Publisher Reports	Shows the Send button for BI Publisher reports on dashboard pages.	Everyone
	Analyze BI Publisher Reports	Shows the Analyze button for BI Publisher reports on dashboard pages.	Presentation Services Administrators, Administrators
List Formats	Create List Formats		Administrators
	Create Headers and Footers		Administrators
	Access Options Tab		Administrators
	Add/Remove List Format Columns		Administrators

Table 17. Privileges and Default Settings for the Oracle Business Intelligence Infrastructure

Component	Privilege	Description	Presentation Services Group Granted Permission
Segmentation	Create Segments		Administrators
	Create Segment Trees		Administrators
	Create/Purge Saved Result Sets		Administrators
	Access Segment Advanced Options Tab		Administrators
	Access Segment Tree Advanced Options Tab		Administrators
	Change Target Levels within Segment Designer		Administrators
SOAP	Access SOAP		Everyone or Presentation Services Administrators, depending on the Subject Area
Subject Area (by its name)	Access within Answers		Everyone
View Column Filter Prompt	Add/Edit Column Filter Prompt View		Everyone
View Column Selector	Add/Edit Column Selector View		Everyone
View Compound	Add/Edit Compound View		Everyone
View Filters	Add/Edit Filters View		Everyone
View Funnel Chart	Add/Edit Funnel Chart View		Everyone
View Gauge	Add/Edit Gauge View		Everyone
View Dashboard Prompt	Add/Edit Dashboard Prompt View		Everyone
View Static Text	Add/Edit Static Text View		Everyone
View Image	Add/Edit Image View		Everyone
View Legend	Add/Edit Legend View		Everyone
View Narrative	Add/Edit Narrative View		Everyone



Table 17. Privileges and Default Settings for the Oracle Business Intelligence Infrastructure

Component	Privilege	Description	Presentation Services Group Granted Permission
View Nested Request	Add/Edit Nested Request View		Everyone
View No Results	Add/Edit No Results View		Everyone
View Pivot Table	Add/Edit Pivot Table		Everyone
View Create Segment	Add/Edit Create Segment View		Everyone
View Logical SQL	Add/Edit Logical SQL View		Everyone
View Chart	Add/Edit Chart View		Everyone
View Table	Add/Edit Table View		Everyone
View Create Target List	Add/Edit Create Target List View		Everyone
View Ticker	Add/Edit Ticker View		Everyone
View Title	Add/Edit Title View		Everyone
View View Selector	Add/Edit View Selector View		Everyone
Write Back	Write Back to Database	Grants the right to write data into the database.	Administrators
	Manage Write Back	Grants the right to manage write back reports.	Presentation Services Administrators

## Guidelines for Configuring Oracle BI Presentation Services Security for the Presentation Catalog and Dashboards

To set up a secure Presentation Catalog and secure dashboards, you must understand the information presented in the previous chapters, because you are working with Presentation Catalog, dashboards, and Presentation Services groups.

This section contains the following topics:

- [“Creating Presentation Services Groups” on page 162](#)
- [“Setting Up the Presentation Catalog Structure” on page 162](#)

- [“Setting Permissions to Presentation Catalog Items” on page 164](#)
- [“Creating Shared Dashboards” on page 164](#)
- [“Adding Shared Dashboards Pages and Content” on page 165](#)
- [“Testing the Dashboards” on page 166](#)
- [“Setting Up a Virtual Directory for Shared Oracle Business Intelligence Documents” on page 167](#)
- [“Releasing Dashboards to the User Community” on page 167](#)

## Creating Presentation Services Groups

When you create a Presentation Services group, a shared Presentation Catalog group folder is automatically created. For more information about Presentation Services groups, read [“Types of Presentation Services Groups” on page 138](#). For more information about the group folder, read [“Setting Up the Presentation Catalog Structure” on page 162](#).

## Setting Up the Presentation Catalog Structure

The Presentation Catalog has two main folders:

- **/Shared.** Contains shared folders, shared dashboards, and shared dashboard content.
- **/User.** Contains the personal storage and My Dashboards for each user.

Figure 2 shows the recommended higher-level folder structure for the /Shared folder in the Presentation Catalog.

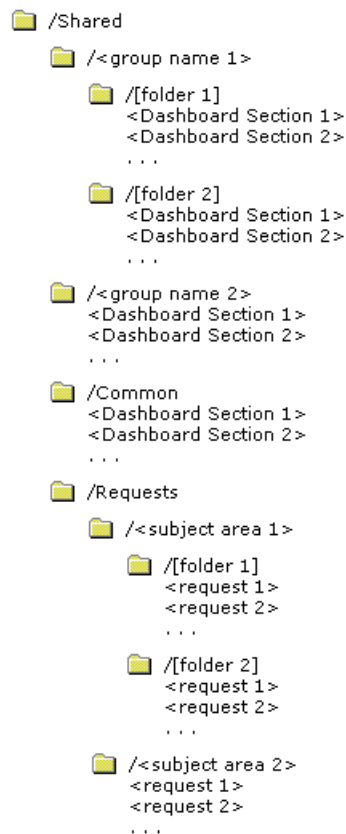


Figure 2. Recommended Structure for the /Shared Folder in Presentation Catalog

The Presentation Catalog structure shown in Figure 2 makes it easier for users and administrators to reorganize content and make shared dashboard sections available. This, in turn, facilitates My Dashboard creation by allowing users to select from shared content.

Items shown within brackets ( [ ] ) are optional. Items shown within angle brackets ( < ) should be replaced with the appropriate name.

## Group Folder

When you create a Presentation Services group, the system automatically creates a shared folder for the group. All members of the Presentation Services group are automatically given Read permissions to this folder. These permissions are inherited by any subfolders that you create.

Group folders hold shared dashboard content that pertains to only members of the Presentation Services group. Optionally, the shared content can be further organized into subfolders under the Group folder.

**NOTE:** You may want to remove this folder and grant group permissions to other folders if there is no group-specific content.

## Common Folder

Dashboard sections that are shared across groups are saved in a Common folder under the /Shared folder. Content can be organized into subfolders under the Common folder.

Create only the Common and Requests subfolders under the /Shared folder.

## Requests Folder

When you create requests in Answers that you want to share, save them in a Requests folder in the /Shared folder.

Create a folder for each subject area in the Requests folder for storing requests against that subject area. This allows you to manage permissions at the level of the subject area. If two or more subject areas are closely related, so that users with permission to one would almost always have permission to the other, you could create a single folder to store requests against both subject areas.

**NOTE:** If a user is given permission to a request in the Presentation Catalog that references a Subject Area to which the user does not have permission, the Oracle BI Server still prevents the user from executing the request.

In cases where you have requests that span subject areas (requests that involve SQL subqueries), you can put them in the folder for any of the subject areas, or create a new folder for users that have permission for these subject areas.

For more information about working with the Presentation Catalog, read [Chapter 6, "Administering the Oracle BI Presentation Catalog."](#)

## Setting Permissions to Presentation Catalog Items

Before setting permissions to the Presentation Catalog items you have created, review the information in ["About Setting Oracle BI Presentation Services Permissions" on page 147.](#)

## Creating Shared Dashboards

After setting up the Presentation Catalog structure and setting permissions, you can create shared dashboards and content for reuse by others. If you did not specify a dashboard when creating a group, you can create one now, selecting the appropriate group folder.

The advantage to creating shared dashboards is that sections that are created in the shared dashboard are actually shortcuts to folders in the /Shared folder. As such, you can remove them and add them again in a different column, page, or even a different dashboard. Users can create a My Dashboard from existing shared sections by clicking the Add Folder link and selecting the appropriate folder from the /Shared/Group or /Shared/Common folders in the Presentation Catalog.

If you plan to allow multiple users to modify the Presentation Services group's default dashboard, consider putting these users into another group. For example, suppose you create a Presentation Services group called Sales and create a default dashboard called SalesHome. Of the 40 users that are members of the Sales group, suppose that there are three who need to have the ability to create and modify content for the SalesHome dashboard. Create a SalesAdmin group, with the same permissions as the primary Sales group. Add the three users who are allowed to make changes to the SalesHome dashboard and content to this new SalesAdmin group, and give this group the appropriate permissions to the Presentation Catalog. This allows them to create and modify content for the SalesHome dashboard. If a user no longer requires the ability to modify dashboard content, you can change the user's group membership to Sales. If an existing Sales group member needs to have the ability to create dashboard content, the user's group membership can be changed to SalesAdmin.

Dashboards are stored in a special folder, \_portal, that is hidden (unless the option to show hidden items is checked when working with the Presentation Catalog). The hidden \_portal folder is located directly underneath a group folder. Because the dashboard is contained in the Group folder, all the permissions you set to the group folder are inherited.

You can create multiple dashboards within a Group folder, each of which will have its own folder (named the same as the dashboard name you assign) within the /\_portal folder. Underneath the specific dashboard folder, for example, /\_portal/SalesGroup Dashboard, are folders that correspond to the pages you have created in the dashboard. Underneath the page folder are folders for the columns.

**NOTE:** Column folders are assigned names automatically by the system.

Within the column folders are the sections (folders or shortcuts to folders) that contain the items or shortcuts to items that appear in the dashboard.

For more information about creating shared dashboards, read ["About Managing Dashboards" on page 77](#).

## Adding Shared Dashboards Pages and Content

After you have created dashboards, you can add pages and content.

### Adding Pages and Content

For information about adding pages and columns, read *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.

## Adding Sections

A section is a folder, or a shortcut to a folder, that appears within a dashboard. For the procedure for adding sections to a dashboard, read [“Managing Dashboards” on page 78](#).

When adding requests from Answers to a section, do one of the following:

- Include requests previously saved to the Subject Area folders.
- Create a new request, save it in the appropriate Subject Area folder, and add it to the shared section using the Existing Request link.

This technique is preferred for several reasons. The permissions on the Subject Area folders filter requests from the dashboard from users that might have dashboard permission, but not permission to certain subject areas. You can refer to the same request in multiple dashboard sections, you can change it once, and have it reflected in all sections.

If you are working with content that is specific to a number of group folders, you might want to create a new folder directly underneath the /Shared folder to use, and set permissions to the new folder to Read for the appropriate groups.

## Creating and Using Shared Items

In addition to creating shared sections, you can create other shared content that can be used within shared and My Dashboard sections. For example, you could create a library of images by creating a folder called "Images" in the /Shared/Common folder. Add this folder as a section in a dashboard - perhaps the "My Dashboard" of the Administrator (although it does not really matter because once you placed the images in the section you can remove it from the dashboard). Remember, it is a shared section, so the folder will still exist in the shared portion of the catalog. Edit the section and click the Image link to add each image that you want in the library.

**NOTE:** If you have a number of libraries that you want to make available to share, you might want to create folders within the /Common folder called /Sections and /Content or /Libraries, so it is easier to distinguish when using the common sections and content in other dashboards.

To use the shared content in a section of "My Dashboard," the user can simply edit the desired section, click the Item from Catalog link, navigate to the /Shared/Common/Images folder, and click the image to include.

This same mechanism should be used for any logos, images, scripts, links, copyrights, and so on, that are or might be used in more than one dashboard or dashboard section. This allows you to change the item in one location and have it immediately reflected in all dashboards.

## Testing the Dashboards

Before releasing dashboards and content to the user community, perform some tests.

### *To test the dashboard*

- 1 Verify that users with appropriate permissions can correctly access it and view the intended content.
- 2 Verify that users without appropriate permissions cannot access the dashboard.
- 3 Verify that styles and skins are displayed as expected, and that other visual elements are as expected.
- 4 Correct any problems you find and test again, repeating this process until you are satisfied with the results.

## Setting Up a Virtual Directory for Shared Oracle Business Intelligence Documents

Set up a virtual directory on the Web server for shared documents. Name the directory /DashboardFiles and map it to a shared network directory of the same name.

This allows users with the appropriate permissions to publish files to this folder, and reference these files by their relative URL names rather than by their fully qualified network share names, for example, /DashboardFiles/Annual Report.doc instead of \\SharedServer\CommonShare\DashboardFiles\Annual Report.doc.

## Releasing Dashboards to the User Community

After testing is complete, notify the user community that the dashboard is available, providing the relevant network address.

## About Authorizing Users to Act for Others

You can authorize one user to act for another user in Oracle BI Presentation Services. When a user (called the proxy user) acts as another (called the target user), the proxy user can see the dashboards and reports of the target user.

Authorizing a user to act for another is useful, for example, when a manager wants to delegate some of his work to one of his direct reports or when IT support staff wants to troubleshoot another user's account.

When you authorize a user to be a proxy user, you also assign an authority level (called the proxy level). The proxy level determines the privileges and permissions granted to the proxy user when accessing the dashboards and reports of the target user.

There are two proxy levels:

- **Restricted.** Permissions are read-only to the items to which the target user has access. Privileges are determined by the proxy user's account (not the target user's account).

For example, suppose a proxy user *has not* been assigned the Access to Answers privilege, and the target user *has*. When the proxy user is acting as the target user, he or she *cannot* access Answers.

- **Full.** Permissions and privileges are inherited from the target user's account.

For example, suppose a proxy user *has not* been assigned the Access to Answers privilege, and the target user *has*. When the proxy user is acting as the target user, he or she *can* access Answers.

Once you have authorized a user to act as a proxy user, he or she can then use the Settings > Act As option in Oracle BI Presentation Services to select the target user to act as.

**TIP:** Before a proxy user can act as a target user, the target user must have logged in to Oracle BI Presentation Services at least once and accessed his or her dashboard. (A default dashboard is created the first time the dashboard is displayed. This requires write privileges, which the proxy user may not have.)

## Process of Authorizing Users to Act for Others

To authorize users to act for others, perform the following tasks:

- [Defining the Association Between Proxy Users and Target Users on page 168](#)
- [Creating Session Variables for Proxy Functionality on page 169](#)
- [Modifying the instanceconfig.xml File for Proxy Functionality on page 170](#)
- [Creating a Custom Message Template for Proxy Functionality on page 170](#)
- [Assigning the Proxy Privilege on page 173](#)

### Defining the Association Between Proxy Users and Target Users

This task is a step in [Process of Authorizing Users to Act for Others on page 168](#).

You define the association between proxy users and target users in the database by identifying, for each proxy user/target user association, the:

- ID of the proxy user
- ID of the target user
- Proxy level (either full or restricted)



For example, you might create a table called Proxies in the database that looks like this:

proxyId	targetId	proxyLevel
Ronald	Edward	full
Timothy	Tracy	restricted
Jeanne	Natalie	full
William	Kelly	restricted
Gail	Michael	restricted

After you define the association between proxy users and target users, you need to import the schema to the physical layer of the Oracle BI Server. For more information on importing a schema, see the *Oracle Business Intelligence Server Administration Guide*.

## Creating Session Variables for Proxy Functionality

This task is a step in [Process of Authorizing Users to Act for Others on page 168](#).

There are two session variables along with their associated initialization blocks that you create to authenticate proxy users:

Session Variable	Associated Initialization Block
PROXY	<p>Initialization Block Name: ProxyBlock</p> <p>Initialization String Example:</p> <pre>select targetId from Proxies where 'VALUEOF(NQ_SESSION.RUNAS)' =targetId and ':USER' =proxyId</pre> <p>(Note that you will need to modify this SQL according to the schema of your database.)</p>
PROXYLEVEL (optional)  <b>NOTE:</b> If you do not create PROXYLEVEL, restricted access is assumed.	<p>Initialization Block Name: ProxyLevel</p> <p>Initialization String Example:</p> <pre>select proxyLevel from Proxies where 'VALUEOF(NQ_SESSION.RUNAS)' =targetId and ':USER' =proxyId</pre> <p>(Note that you will need to modify this SQL according to the schema of your database.)</p>

For more information on creating session variables, see the *Oracle Business Intelligence Server Administration Guide*.

## Modifying the instanceconfig.xml File for Proxy Functionality

This task is a step in [Process of Authorizing Users to Act for Others on page 168](#).

You can modify the Oracle BI Presentation Services configuration file (instanceconfig.xml) to specify the following information for proxy functionality:

- The name of the custom message template in the Custom Messages folder that contains the SQL to:
  - Get the list of target users that a proxy user can act as
  - Verify whether the proxy user can act as the target user
  - Get the list of proxy users that can act as the target user

The default name is LogonParamSQLTemplate.

For more information about the custom message template, see [“Creating a Custom Message Template for Proxy Functionality” on page 170](#).

- The maximum number of target users to be listed in the User box in the Act As dialog box. If the number of target users for a proxy user exceeds this value, an edit box, where the proxy user can type the ID of a target user, is rendered rather than a drop-down list of target users.

The default is 200.

You specify the name of the custom message template and the maximum number of target users in the <TemplateName> and <MaxValues> elements, which appear between the <LogonParam> and </LogonParam> elements.

For example:

```
<LogonParam>
    <TemplateName>LogonParamSQLTemplate</TemplateName>
    <MaxValues>100</MaxValues>
</LogonParam>
```

**NOTE:** The name that you specify in the <TemplateName> element must match the name that you specify in the <WebMessage> element in the custom message file. For more information, see [“Creating a Custom Message Template for Proxy Functionality” on page 170](#).

## Creating a Custom Message Template for Proxy Functionality

This task is a step in [Process of Authorizing Users to Act for Others on page 168](#).

You need to create a custom message template for the proxy functionality that contains the SQL to:

- Get the list of target users that a proxy user can act as. This list appears in the User box in the Act As dialog box.

- Verify whether the proxy user can act as the target user.
- Get the list of proxy users that can act as the target user. This list appears on the target user's My Account screen.

In the custom message template, you place the SQL to retrieve this information in the following XML elements:

Elements	Description
<code>&lt;getValues&gt;</code> <code>&lt;/getValues&gt;</code>	<p>Specifies the SQL to return the list of target users and corresponding proxy levels.</p> <p>The SQL must return either one or two columns, where the:</p> <ul style="list-style-type: none"><li>■ First column returns the IDs of the target users</li><li>■ (Optional) Second column returns the names of the target users</li></ul>
<code>&lt;verifyValue&gt;</code> <code>&lt;/verifyValue&gt;</code>	<p>Specifies the SQL to verify if the current user can act as the specified target user.</p> <p>The SQL must return at least one row if the target user is valid or an empty table if the target user is invalid.</p>
<code>&lt;getDelegateUsers&gt;</code> <code>&lt;/getDelegateUsers&gt;</code>	<p>Specifies the SQL to get the list of proxy users that can act as the current user and their corresponding proxy levels.</p> <p>The SQL must return either one or two columns, where the:</p> <ul style="list-style-type: none"><li>■ First column returns the names of the proxy users</li><li>■ (Optional) Second column returns the corresponding proxy levels</li></ul>

You can create the custom message template in one of the following files:

- The custom message file in the SAROOTDIR\web\msgdb\customMessages folder, where SAROOTDIR is the installation directory
- A separate XML file in the SAROOTDIR\web\msgdb\customMessages folder, where SAROOTDIR is the installation directory

#### ***To create the custom message template:***

- 1 If you want to create the custom message template in the original custom message file:
  - a Make a backup of the original custom message file in a separate folder.
  - b Make a development copy in a different folder and open it in a text or XML editor.
- 2 If you want to create the custom message template in a separate XML file, create and open the file in the SAROOTDIR\web\msgdb\customMessages folder, where SAROOTDIR is the installation directory.

- 3 Start the custom message template by adding <WebMessage> begin and end elements. For example:

```
<WebMessage name="LogonParamSQLTemplate">

</WebMessage>
```

**NOTE:** The name that you specify in the <WebMessage> element must match the name that you specify in the <TemplateName> element in the Oracle BI Presentation Services configuration file (instanceconfig.xml). For more information, see ["Modifying the instanceconfig.xml File for Proxy Functionality" on page 170.](#)

- 4 After the <WebMessage> element:
  - a Add the <XML> and </XML> elements
  - b Between the <XML> and </XML> elements, add the <logonParam name="RUNAS"> and </logonParam> elements
  - c Between the <logonParam name="RUNAS"> and </logonParam> elements, add each of the following elements along with its corresponding SQL:
    - ❑ <getValues> and </getValues>
    - ❑ <verifyValue> and </verifyValue>
    - ❑ <getDelegateUsers> and </getDelegateUsers>

The following entry is an example:

```
<XML>

  <logonParam name="RUNAS">

    <getValues>select targetId
              from Proxies
              where proxyId='@{USERID}' </getValues>

    <verifyValue>select targetId
                 from Proxies
                 where proxyId='@{USERID}'
                 and targetId='@{VALUE}' </verifyValue>

    <getDelegateUsers>select proxyId, proxyLevel
                     from Proxies
                     where targetId='@{USERID}'
  </getDelegateUsers>

  </logonParam>

</XML>
```

(Note that you will need to modify the example SQL according to the schema of your database.)

- 5 If you created the custom message template in the development copy of the original file, replace the original file in the customMessages folder with the newly edited file.
- 6 Test the new file.

- 7 (Optional) If you created the custom message template in the development copy of the original file, delete the backup and development copies.
- 8 Load the custom message template by either restarting the server or clicking the Reload Files and Metadata link on the Oracle BI Presentation Services Administration screen. For more information on the Oracle BI Presentation Services Administration screen, see [“Overview of the Oracle BI Presentation Services Administration Screen” on page 148](#).

## Assigning the Proxy Privilege

This task is a step in [Process of Authorizing Users to Act for Others on page 168](#).

For each user whom you want to authorize as a proxy user or for each Presentation Services group whose members you want to authorize as proxy users, you need to assign the Proxy privilege. For more information on how to assign privileges, see [“Setting Privileges in Oracle BI Presentation Services Administration” on page 152](#).

## Enabling User-Initiated Administration Actions

By default, users cannot change their own passwords or join Presentation Services groups. This is customizable, you can enable one or both of these privileges. This change affects your entire user community.

### *To enable user-initiated administration actions*

- 1 Stop WWW, Web server, and Oracle Business Intelligence services.
- 2 Copy \SAROOTDIR\web\msgdb\messages\controlmessages.xml to \SAROOTDIR\web\msgdb\customMessages\controlmessages.xml, where SAROOTDIR is the installation directory.
- 3 Open the copied file with a text editor.
- 4 To enable users to join Presentation Services group, do the following:

- a Find the following configuration key:

```
<WebMessage name="kmsgJoinGroupLink"><!--<HTML><A insert="1"><MessageRef
name="kmsgUIJoinGroup"/></A></HTML> --></WebMessage>
```

- b Edit it as follows:

```
<WebMessage name="kmsgJoinGroupLink"><HTML><A insert="1"><MessageRef
name="kmsgUIJoinGroup"/></A></HTML></WebMessage>
```

This edit removes “<!--” and “-->” from the key. These two phrases disable the feature.

- 5 To enable users to change passwords, do the following:
- a Find the following configuration key:

```
<WebMessage name="kmsgChangePasswordLi nk"><!--<HTML><A insert="1"><MessageRef  
name="kmsgUI ChangePassword"/></A></HTML> --></WebMessage>
```

**b** Edit it as follows:

```
<WebMessage name="kmsgChangePasswordLi nk"><HTML><A insert="1"><MessageRef  
name="kmsgUI ChangePassword"/></A></HTML></WebMessage>
```

This edit removes “<!--” and “-->” from the key. These two phrases disable the feature.

- 6** Save the edited file.
- 7** Restart the Oracle BI Server, Web server, and WWW services in that order.

# 9

## Using Oracle BI Presentation Services Logging

Oracle BI Presentation Services includes a logging facility that logs information that can be used to troubleshoot problems. This logging facility is also highly configurable. This chapter describes the configuration parameters for the logging facility, and provides information about Oracle BI Presentation Services log files.

This chapter contains the following sections:

- [Using the Oracle BI Presentation Services Logging Facility on page 175](#)
- [Oracle BI Presentation Services Configuration File Structure on page 176](#)
- [Oracle BI Presentation Services Message Structure on page 183](#)
- [Oracle BI Presentation Services Logging Levels on page 185](#)
- [Oracle BI Presentation Services Log Filters on page 186](#)

See also Technical Note 519, available on Siebel SupportWeb.

## Using the Oracle BI Presentation Services Logging Facility

By default, Oracle BI Presentation Services is configured to log all error events and informational and warning events of sufficient importance. An example of an important informational event would be a server starting up or a server shutting down. Log files are named sawlogxx.log, where the xx is replaced by an incremented number.

To debug specific issues that a user may be encountering, the logging level can be increased to log more information than the default configuration. For example, while debugging a particular Oracle BI Presentation Services connectivity issue, it might be useful to increase the maximum logging on the saw.odbc log source only. This adds detailed logging for that component, without cluttering the log with detailed logging from other events. Another example is to create a new log writer that records only chart events. For an illustration of this example, see [Figure 5 on page 178](#).

**CAUTION:** Do not increase the logging on a production implementation, except to diagnose specific issues. Logging affects performance.

All Oracle BI Presentation Services configuration information is loaded from the file logconfig.xml, located in the following directory (based on operating system platform):

- Windows:  
SADATADIR/web/config
- UNIX:  
SADATADIR/web/config

where SADATADIR is the Oracle BI Presentation Services data directory.

## Oracle BI Presentation Services Configuration File Structure

The structure of the configuration XML file is shown in [Figure 3](#). The cardinality of each node is shown in brackets.

```
Config
Default [1..1]
  Writers [0..1]
    Writer [0..1]
      Filters [0..1]
        FilterRecord [0..n]
  WriterClassGroups [0..1]
    WriterClassGroup [0..n]
  Filters [0..1]
    FilterRecord [0..n]
```

Figure 3. Structure of a logconfig.xml File



An example of a logconfig.xml file that has four writers is shown in Figure 4.

```
<?xml version="1.0" ?>
<Config>
  <Default>
    <Writers>
      <Writer implementation="FileLogWriter" name="Global File Logger"
        writerClassId="1" dir="{ %SADATADIR% } /web/log" filePrefix="sawlog"
        maxFileSizeKb="10000" filesN="10" />
      <Writer implementation="CoutWriter" name="Global Output Logger"
        writerClassId="2" />
      <Writer implementation="EventLogWriter" name="Event Logger"
        writerClassId="3" />
      <Writer implementation="CrashWriter" name="CrashWriter" writerClassId="4"
        />
    </Writers>
    <WriterClassGroups>
      <WriterClassGroup name="All">1,2,3,4</WriterClassGroup>
      <WriterClassGroup name="File">1</WriterClassGroup>
      <WriterClassGroup name="Cout">2</WriterClassGroup>
      <WriterClassGroup name="EventLog">3</WriterClassGroup>
      <WriterClassGroup name="Crash">4</WriterClassGroup>
    </WriterClassGroups>
    <Filters>
      <FilterRecord writerClassGroup="Cout" path="saw" information="31"
        warning="41" error="41" security="41" />
      <FilterRecord writerClassGroup="File" path="saw" information="31"
        warning="100" error="100" security="41" />
      <FilterRecord writerClassGroup="File" path="saw.mktgsqldbssystem.joblog"
        information="41" warning="100" error="100" security="41" />
      <FilterRecord writerClassGroup="File" path="saw.httpserver.request"
        information="51" warning="100" error="100" security="41" />
      <FilterRecord writerClassGroup="File" path="saw.httpserver.response"
        information="51" warning="100" error="100" security="41" />
    </Filters>
  </Default>
</Config>
```

Figure 4. Example of a logconfig.xml File with Four Writers

An example of a logconfig.xml file that has one writer set up to record charting events is shown in Figure 5.

```
<Config>
<Default>
  <Writers>
    <Writer implementation="FileLogWriter" name="Global File Logger" writerClassId="1"
      dir="{%SADATADIR%}/web/log" filePrefix="sawlog" maxFileSizeKb="10000"
      filesN="10" />
    <Writer implementation="CoutWriter" name="Global Output Logger"
      writerClassId="2"/>
    <Writer implementation="EventLogWriter" name="Event Logger" writerClassId="3" />

    <!-- New log writer dedicated for charts -->
    <Writer implementation="FileLogWriter" name="Chart Logger"
      writerClassId="4"
      dir="{%SADATADIR%}/web/log/chart" filePrefix="sawlog"
      maxFileSizeKb="10000" filesN="10" />
  </Writers>
  <WriterClassGroups>
    <WriterClassGroup name="All">1,2,3,4</WriterClassGroup>
    <WriterClassGroup name="File">1</WriterClassGroup>
    <WriterClassGroup name="Cout">2</WriterClassGroup>
    <WriterClassGroup name="EventLog">3</WriterClassGroup>
    <WriterClassGroup name="Chart">4</WriterClassGroup>
  </WriterClassGroups>
  <Filters>
    <FilterRecord writerClassGroup="Cout" path = "saw" information="31" warning="41"
      error="41" security="41"/>
    <FilterRecord writerClassGroup="File" path = "saw" information="31" warning="100"
      error="100" security="41"/>
    <FilterRecord writerClassGroup="File" path = "saw.mktgsqlsubsystem.joblog"
      information="41" warning="100" error="100" security="41"/>
    <!-- Logs all chart events, including minor informational events -->
    <FilterRecord writerClassGroup="Chart" path = "saw.charts"
      information="100" warning="100" error="100" security="100"/>
    <FilterRecord writerClassGroup="Chart" path = "saw.views.chart"
      information="100" warning="100" error="100" security="100"/>
  </Filters>
</Default>
</Config>
```

Figure 5. Example of a logconfig.xml File with ChartLogger Writer

A description of each node in the configuration hierarchy is shown in [Table 18](#).

Table 18. Oracle BI Presentation Services Log Configuration File Elements

Element	Attribute	Description
Writers		Contains writers configuration. This configuration is loaded on startup.
Writer		Configures a writer.
	implementation	<p>Name of the C++ class that implements the writer.</p> <p>The following implementations are defined:</p> <ul style="list-style-type: none"> <li>■ FileLogWriter. Writes to a disk file.</li> <li>■ CoutWriter. Writes to standard output.</li> <li>■ EventLogWriter. Writes to Windows event log or UNIX syslog.</li> <li>■ CrashWriter. Writes to a crash dump file when the Oracle BI Presentation Services attempts to log from a specific source file and line number. <ul style="list-style-type: none"> <li>■ Used in a production environment for information of some loggable but non-fatal error (for example, failed NQTEST).</li> <li>■ On Windows, CrashWriter requires appropriate version of dbgHELp.dll (at least 6.0.17.0). The correct dbgHELp.dll is found in support/windows/system32. Put this DLL in the WINNT/system32 or in the main/bin directory. No registration is required.</li> </ul> </li> </ul>
	name	Unique name for the writer.
	writerClassId	<p>Integer number in the range 1-10. This number is used by filters to allow or prohibit logging.</p> <p>Each distinct writer must have a unique value, which is used later for filter configuration.</p> <p>Different writers may have the same class ID, but if they do, those writers cannot be distinguished by filters.</p>

Table 18. Oracle BI Presentation Services Log Configuration File Elements

Element	Attribute	Description
Writer (continued)	fmtName	<p>(optional) Specifies the format of logged messages. Valid values are:</p> <ul style="list-style-type: none"> <li>■ <b>default</b>. Formats messages with identifying headings.</li> <li>■ <b>short</b>. Formats messages in a shortened form without identifying headings.</li> <li>■ <b>xml</b>. Formats messages in XML.</li> </ul> <p>If you do not set this attribute, then logged messages appear in the default format.</p> <p>For examples of these formats, see <a href="#">“Examples of the Formats of Logged Messages” on page 181</a>.</p>
	FileLogWriter specific attributes:	
	dir	Directory where log files are to be created.
	maxFileSizeKb	<p>Maximum size of the logging file in kilobytes.</p> <p>When the file size limit is reached, the file is closed and a new logging file is created.</p>
	filePrefix	Log files prefix.
	filesN	<p>Maximum number of logging files.</p> <p>When this number is exceeded, the logger starts to write to the beginning of the first file.</p>
	EventLogWriter specific attributes:	
	winSource	Event log source for logged events.
	CrashWriter specific attributes:	
	file	<p>Dump file path.</p> <p>On Windows, a dump file is created in <code>bin\core\dumps</code> and Oracle BI Presentation Services continues to run.</p>
	line	Dump file line number.
WriterClassGroups	Contains definition for writer classes. Writer class is a group of Writer class IDs.	
WriterClassGroup	Contains (as child text) a comma-separated list of class IDs.	
	name	Name of the WriterClassGroup.
Filters	Contain filter configuration.	

Table 18. Oracle BI Presentation Services Log Configuration File Elements

Element	Attribute	Description
FilterRecord	writerClassGroup	Specifies the group of writers to which this record is applied. WriterClassGroup should be defined previously in the WriterClassGroups section.
	path	Log source path. To enable the logging of SOAP information, enter the following value:  saw.httpserver.request.soaprequest  Current filter record is applied to the software component identified by that path and all its subcomponents.
	information	An integer that specifies the severity of the corresponding message type.  Only messages with a severity index less than the provided number are logged.
	warning	
	error	
	security	

## Examples of the Formats of Logged Messages

The fmtName attribute of the Writer element formats logged messages in one of three formats: default, short, and xml. The following entries are examples of these formats.

### Default Format Example

The default format formats messages with identifying headings like this:

```
Type: Information
Severity: 30
Time: Wed Jul 26 11:22:20 2006
File: project\sawserver\sawserver.cpp
Line: 399
Properties: ThreadID-2552
Location:
    saw.sawserver
    saw.sawserver.initializesawserver
    saw.sawserver
OracleBI Presentation Server has started successfully.
```

### Short Format Example

The short format formats messages in a shortened form without identifying headings like this:

```
I30    Wed Jul 26 11:22:20 2006    sawserver.cpp    399    saw.sawserver    OracleBI
Presentation Server has started successfully.
```

### XML Format Example

The xml format formats messages in XML like this:

```
<Message>
  <Type>I</Type>
  <Severi ty>30</Severi ty>
  <Ti me>Wed Jul 26 11: 22: 20 2006 </Ti me>
  <Fi le>sawserver. cpp</Fi le>
  <Properti es>
    <Property>
      <Name>ThreadI D</Name>
      <Val ues>4524</Val ues>
    </Property>
  </Properti es>
  <Locati on>
    <Logsource>saw. sawserver</Logsource>
    <Logsource>saw. sawserver. ini ti al i zesawserver</Logsource>
    <Logsource>saw. sawserver</Logsource>
  </Locati on>
  <MessageText>OracleBI Presentati on Server has started successfull y. </MessageText>
</Message>
```

## Oracle BI Presentation Services Message Structure

Each message that is logged by Oracle BI Presentation Services has several components, as shown in [Table 19](#).

Table 19. Components of the Oracle BI Presentation Services Log Message

Message Component	Description
Message Text	The text of the log message to the user.
Message Type	One of four types: information, warning, error, or security.  The first three are self-explanatory. Security is reserved for auditing security type information, such as user logged in, login failed, user accessed catalog item XYZ, and so on.
Severity	The severity is represented as a positive integer.  The lower the value, the more important the message. A message with severity 0 is the most important type of message; a message with severity 1000 is not important at all.

Table 19. Components of the Oracle BI Presentation Services Log Message

Message Component	Description
Log Sources	<p>Log sources indicate where the message is coming from.</p> <p>Sources are always of the form <code>saw.component.subComponent.function</code>. There is no limit on the number of periods (.) in a source. The source can be as many levels deep as the programmer decides to make it. Moreover, each logged message can have one or more log sources associated with it, depending on what code path caused that error to be logged.</p> <p>For example, the message "Unable to open file" might be logged with the stack of sources <code>{saw.delivers, saw.charts}</code> as well as the log source stack <code>{saw.views, saw.pdf}</code>.</p> <p>To print all known log sources, use the <code>logsources</code> command option as follows:</p> <ul style="list-style-type: none"> <li>■ In Windows:  <code>SAROOTDIR\web\bin\sawserver /l ogsources</code>  where <code>SAROOTDIR</code> is the installation directory</li> <li>■ In UNIX:  <code>. SAROOTDIR/setup/saw.sh</code>  <code>SAROOTDIR/web/bin/sawserver -l ogsources</code>  where <code>SAROOTDIR</code> is the installation directory</li> </ul>
Message Properties	<p>Properties indicate other kinds of information. The kind varies from message to message, and might include username, IP address of client browser, thread ID, and so on.</p>

**NOTE:** If the log contains the message "Config Key is not set", this is not an error, it is an indication of the status (set or not set) of a configuration key.



# Oracle BI Presentation Services Logging Levels

The categories, impact, and descriptions of the log levels are shown in [Table 20](#).

Table 20. Oracle BI Presentation Services Logging Levels

Category	Level	Impact	Description
Errors	10	Corruption	Data corruption detected.
	20	Fatal	Cannot recover without restart.
	25	Unknown	Special severity case for catch (...).
	30	Critical	A recoverable error that needs attention.
	40	Error	Basic error message.
	45	User	Special severity for user input error.
Warnings	30	Critical	Some immediate action is required to keep system running well.
	40	Warning	Basic warning.
	50	Minor	Relatively minor warning.
Security	20	Fatal	Operation compromised. For example, no license file exists, no components are licensed, a needed directory cannot be accessed, and similar issues.
	30	Critical	Break-in, connection to Delivers server failed due to access denied, or similar issue.
	40	Security	Access denied to a necessary or requested object
	50	Minor	User logon failed due to invalid password or ID, or similar function.
	55	Trace	Special severity for tracing normal security activity, such as user logged in, user logged out, or similar issue.
Information	20	Fatal	Fatal events that need immediate review.
	30	Critical	Essential start-up, shutdown events.
	40	Informational	Administrative information, such as completion of auto-save.
	45	System	Special severity for important system information, such as cache cleanup started, cache cleanup completed.
	50	Minor	Less important, more granular information, such as session time-out.

## Oracle BI Presentation Services Log Filters

FilterRecords customize logging details. Use FilterRecords to specify the implementation (output type) and logging levels for categories of Web logs: Errors, Warnings, Security, and Information.

In the following example, the first two FilterRecords contain the following string:

```
path="saw"
```

This string logs the informational events at level 31, the error messages at level 41, and so on:

```
<FilterRecord writerClassGroup="Cout" path="saw" information="31" warning="41"
  error="41" security="41" />
<FilterRecord writerClassGroup="File" path="saw" information="31" warning="100"
  error="100" security="41" />
<FilterRecord writerClassGroup="File" path="saw.mktgsqldb.joblog"
  information="41" warning="100" error="100" security="41" />
```

This high-level path applies to every event.

You can customize FilterRecords by adding new FilterRecords, such as the third one shown in the preceding example, with finer-grain specification of log levels for events of various types. In this example, information is being logged to a disk file from saw.mktgsqldb.joblog, which generates Marketing job events.

You can turn off logging of job details by changing the information level from 41 to 51, as shown in the following example, or by commenting out the lines:

```
<FilterRecord writerClassGroup="File" path="saw.mktgsqldb.joblog"
  information="41" warning="100" error="100" security="41" />
<FilterRecord writerClassGroup="File" path="saw.httpserver.request"
  information="51" warning="100" error="100" security="41" />
<FilterRecord writerClassGroup="File" path="saw.httpserver.response"
  information="51" warning="100" error="100" security="41" />
```

# 10 Customizing the Oracle BI Presentation Services User Interface

This chapter describes how to customize the appearance of the Oracle BI Presentation Services user interface.

**NOTE:** In Oracle BI Presentation Services, customization of user interface elements and appearance is accomplished by modifying XML message files, and styles and skins, and not through the use of JavaScript. You should not modify JavaScript files located in the folder SAROOTDIR\web\app\res, where SAROOTDIR is the installation directory. This is because the objects and methods in these scripts may change, and because these files may be replaced when upgrading. (In a dashboard, users with the appropriate permissions can customize an individual dashboard section by adding HTML to it. This HTML can include JavaScript. For more information, read *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.)

This chapter contains the following topics:

- [About Skins and Styles on page 187](#)
- [Modifying Oracle BI Presentation Services User Interface Styles on page 188](#)
- [Specifying Defaults for Oracle BI Presentation Services Styles and Skins on page 191](#)
- [Customizing Oracle BI Presentation Services NonDashboard Components on page 191](#)
- [Customizing the Oracle BI Presentation Services User Interface Using XML Message Files on page 192](#)
- [Adding a Language Selection to Oracle BI Presentation Services Screens on page 197](#)
- [Frequently Customized Oracle BI Presentation Services User Interface Messages on page 198](#)
- [Customizing the Appearance of the Oracle BI Presentation Services Login Screens on page 199](#)
- [Configuring the Oracle Business Intelligence ReportUI Portlet on page 199](#)

## About Skins and Styles

The Oracle BI Presentation Services Administrator can control the way the Oracle Business Intelligence interface appears to the user by creating skins and styles. The primary difference between skins and styles is that skins can be automatically assigned to a user at logon, while styles are selectable by the user at runtime to control things such as table formatting, and so on. The default skins and styles shipped with the product are located in the Oracle BI Presentation Services application resources directory (\web\app\res directory in the installation directory) in the sk\_\* and s\_\* folders.

A "skin" is assigned based on the value of the system session variable SKIN. The user can then alter some elements, such as fonts, colors, various attributes of tables and charts, and so on, by picking a "style" for request results (or a dashboard) when logged on to Oracle Business Intelligence. Skins consist of nonalterable elements, such as corporate logos or other graphics.

A "style" controls how dashboards and results are formatted for display, such as the color of text and links, the font and size of text, the borders in tables, the colors and attributes of charts, and so on. Styles consist on alterable elements, often combined into style sheets.

## Using the SKIN Variable

The SKIN variable points to a directory in Oracle BI Presentation Services that contains the nonalterable elements. Such directories are located in the Oracle BI Presentation Services data resources folder (\SADATADIR\web\res) and begin with "sk\_". For example, if a directory were called sk\_MyCompany, the SKIN variable would be set to MyCompany. Styles are organized into similar directories containing the alterable elements. Style folders and style sheets are located in the resources folder in directories beginning with "s\_". For example, if a directory were called s\_MyCompanyStyle, the style name would be My CompanyStyle.

Both skin and style directories may contain Cascading Style sheets (files with a .css extension), images, and chart templates. Oracle BI Presentation Services Administrators can create new styles and skins by creating new style and new skin directories in Oracle BI Presentation Services.

**NOTE:** Style and skin names cannot include underscores.

## Using Skins and Styles

While skins and styles are typically used to customize the look and feel of reports and dashboards by providing logos, color schemes, fonts, table borders and other elements, they can also be used to control the position of such elements as the paging controls by including specialized style tags in the relevant style sheet (.css) file. For example, the page control "tape deck" appears, by default, centered and below a table. You can control whether the tape deck appears below or above the table (or does not appear at all) by editing the table properties for the target results. By using a specialized style tag, however, you can also control the justification of the page control. For example, if you have a very wide table, a centered page control might require the user to scroll to the right before it is displayed. By including the following specialized style tag in the relevant skin or style sheet (.css) file, you can change the justification to the left.

```
. TapeDeckCell  
{  
text-align: left;
```

## Modifying Oracle BI Presentation Services User Interface Styles

You can modify the Cascading Style Sheets (CSS) files and the images stored in the default installation directory to create a custom user interface. The default images and style sheets are located in the SAROOTDIR\web\app\res\s\_oracle10 folder, where SAROOTDIR is the installation directory. The relevant subdirectories are contained in this directory (b\_mozilla\_4, charts, images, maps, meters, popbin, portal, and views) for the current Oracle Business Intelligence style.

Web developers who work with and understand style sheets can modify the default Oracle BI Presentation Services styles.

**NOTE:** Modifications to the PopChart appearance files used in charting are not supported by Oracle Corporation.

This section contains the following topics:

- [“Working with Cascading Style Sheets to Modify Default Oracle BI Presentation Services Styles” on page 189](#)
- [“About Cascading Style Sheet Attributes and Oracle BI Presentation Services” on page 190](#)
- [“Creating a New Dashboard Style for Oracle BI Presentation Services” on page 190](#)
- [“Example: Customizing the Dashboard Banner Image in Oracle BI Presentation Services” on page 190](#)

## Working with Cascading Style Sheets to Modify Default Oracle BI Presentation Services Styles

Web developers who work with and understand style sheets can modify the default Oracle BI Presentation Services styles. There are three files that affect most of the dashboard user interface:

- **PortalBanner.css.** Influences the overall appearance of a dashboard’s top section. This includes the dashboard’s names, links, and so on.
- **PortalContent.css.** Influences the overall appearance of a dashboard’s main content area.
- **Views.css.** Corresponds to each of the Oracle Business Intelligence request views (Title, Table, Pivot Table, Chart, Narrative, Ticker, and so on).

### *To display an example default Oracle 10 style sheet*

- 1 Right-click the dashboard, and select View Source to view the Web page within a text editor.

There are several CSS files referenced within the header of the Web page (<HEAD>....</HEAD>).

- 2 Perform a Find within the document and search for the keyword class.

There is a class variable for each available attribute in one of the CSS files.

The first class that appears is the PortalBody class (<body class="PortalBody">). If you open the PortalContent.css file, you get a corresponding section for PortalBody. For example:

```
. Portal Body {  
    font-family: Verdana, Arial, Sans-serif;  
    font-size: 9pt;  
    background-color: #FFFFFF;  
    margin: 0 0 2 0;  
}
```

You could modify the background color of the dashboard page by changing, for example, the hexadecimal color from #FFFFFF (white) to the color of your choice. If you were to save this change, you could go back to the Web browser and display the change by clicking Refresh.

You can change the various CSS classes to adjust the overall look of any Oracle Business Intelligence application. This can be a tedious process, but after you have a good understanding of the available or most commonly used classes, you can perform a find and replace within the text editor to make mass changes to a style.

## About Cascading Style Sheet Attributes and Oracle BI Presentation Services

Cascading style sheets allow Web developers to have control over any object within Oracle Business Intelligence. You can change images, backgrounds, font colors and sizes, table cell gridlines and cell padding, and so on.

For more information about cascading style sheets, you can consult a resource such as the Microsoft Developer Network (MSDN).

## Creating a New Dashboard Style for Oracle BI Presentation Services

The easiest way to create a new style is to copy the SAROOTDIR\web\app\res\s\_oracle10 directory (where SAROOTDIR is the installation directory) and paste it into the SADATADIR\web\res directory (where SADATADIR is the data directory). Copying to the data directory rather than to the main installation directory prevents any customized CSS files and images from being overwritten during a software upgrade.

After the style has been copied, rename the directory from s\_oracle10 to a name that has meaning to you (such as s\_ProspectName).

The b\_mozilla\_4.0 directory contains the important files for making quick changes to the dashboards.

**NOTE:** The service for Oracle BI Presentation Services must be restarted before you can display the new style sheet from the Dashboard Properties screen.

### *To create a new style*

- 1 Copy the SAROOTDIR\web\app\res\s\_oracle10 directory (where SAROOTDIR is the installation directory).
- 2 Paste it to the SADATADIR\web\res directory (where SADATADIR is the data directory) and give it a meaningful name.
- 3 Make and save your modifications.

The style sheet becomes available in the Dashboard Properties screen when the service for Oracle BI Presentation Services is restarted.

## Example: Customizing the Dashboard Banner Image in Oracle BI Presentation Services

The image bg\_Banner.gif image is referenced on the top section of dashboards. Developers can open the bg\_Banner.gif file and make changes, or delete and recreate a new bg\_Banner.gif file.

## Specifying Defaults for Oracle BI Presentation Services Styles and Skins

You can specify which style and skin to use when users choose the default style at the Dashboard Properties screen in Dashboards by adding entries to the Oracle BI Presentation Services configuration file (instanceconfig.xml):

■ [“Specifying Which Oracle BI Presentation Services Style Folder to Use” on page 191](#)

■ [“Specifying Which Oracle BI Presentation Services Skins Folder to Use” on page 191](#)

If users do not make a choice, or if these entries are not present in the instanceconfig.xml file, the Oracle Corporation styles and skins are used. These styles and skins are located in the s\_oracle10 and sk\_oracle10 folders in the SAROOTDIR\web\app\res directory, where SAROOTDIR is the installation directory.

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read [“Making Oracle BI Presentation Services Configuration Changes” on page 15](#).

### Specifying Which Oracle BI Presentation Services Style Folder to Use

You can specify which style folder to use in the \web\app\res folder when users select the Default option from the Styles drop-down list at the Dashboard Properties screen in Dashboards. If your style folder begins with the characters s\_, such as s\_TestStyle, omit those characters from the entry.

The following entry is an example:

```
<Default tStyl e>TestStyl e</Defaul tStyl e>
```

### Specifying Which Oracle BI Presentation Services Skins Folder to Use

To specify the skins folder that is paired with the style folder you selected as described in [“Specifying Which Oracle BI Presentation Services Style Folder to Use” on page 191](#), add the following entry. If your skins folder begins with the characters sk\_, such as sk\_TestSkin, omit those characters from the entry.

The following entry is an example:

```
<Default tSki n>TestSki n</Defaul tSki n>
```

## Customizing Oracle BI Presentation Services NonDashboard Components

Non-dashboard components include Answers, Delivers, and Oracle BI Presentation Services Administration. The CSS files for these components are stored in the sk\_ directory within the main installation directory (SAROOTDIR\web\app\res\sk\_oracle10). The location b\_mozilla\_4 contains the relevant CSS files that correspond to Answers, Delivers, and Oracle BI Presentation Services Administration, and so on.

Use the same logic that is described in [“Modifying Oracle BI Presentation Services User Interface Styles” on page 188](#) to make modifications to the non-dashboard components of the Oracle BI Presentation Services user interface.

The non-dashboard components are controlled globally. Users cannot toggle between multiple user interfaces for the nondashboard components.

## Customizing the Oracle BI Presentation Services User Interface Using XML Message Files

This section explains how to customize text elements in message files to manage the default appearance and behavior of the Oracle BI Presentation Services user interface using XML strings.

**NOTE:** The intent of this section is to allow organizations that have XML expertise to perform additional customization. If you do not have this expertise, enlist the assistance of a third party to help you with customization.

This section contains the following topics:

- [“About the Oracle BI Presentation Services User Interface XML Message Files” on page 192](#)
- [“How Oracle BI Presentation Services XML Message Files Are Structured” on page 193](#)
- [“Customizing Oracle BI Presentation Services XML Messages” on page 193](#)
- [“Resolution of Oracle BI Presentation Services XML Message Name Elements” on page 194](#)
- [“Sample Oracle BI Presentation Services XML Template” on page 195](#)
- [“Sample Oracle BI Presentation Services custommessages.xml File” on page 196](#)

**NOTE:** Other topics in this guide describe additional customizations that you can perform by customizing text elements in message files, such as [“Configuring Answers Pivot Table Settings” on page 52](#).

### About the Oracle BI Presentation Services User Interface XML Message Files

You can customize many of the text elements that appear in Answers, Delivers, and on dashboard pages. Examples of text elements include the content of text strings, the text for prompts such as the names of links and buttons, and the text of error and informational messages that are displayed to users as the result of an action.

These text elements are contained in external message files that are distributed with Oracle BI Presentation Services. The message files are in XML format. Language-specific messages are located in the folder `SAROOTDIR\web\msgdb\l_xx\messages`, where `SAROOTDIR` is the installation directory and `xx` is the language identifier of the selected locale (for example, for `english-usa`, the identifier is `en`). Language-independent messages are located in the folder `SAROOTDIR\web\msgdb\messages`, where `SAROOTDIR` is the installation directory.



You should not edit the message files directly because any changes would not be retained when you install newer versions or service releases. For more information, read [“Customizing Oracle BI Presentation Services XML Messages” on page 193](#).

## How Oracle BI Presentation Services XML Message Files Are Structured

The name of a particular message file indicates the kind of content that it holds. For example, messages in the file `logonmessages.xml` hold message content related to the act of logging on and off the application. Within each XML file, the `WebMessage` `name=` elements define the names of the messages. These elements are called *message identifiers*.

A particular message may also reference the content of another message by using a `MessageRef` element. For example, the following message in the file `logonmessages.xml` references the value of another message:

```
<WebMessage name="kmsgAuthenticateNotLoggedInToLogOnClickHere">
  <HTML>
    You are not currently logged in to the
    <MessageRef name="kmsgProductServer" />
  </HTML>
</WebMessage>
```

The entry `<MessageRef name="kmsgProductServer" />` in the previous message indicates that the name of the server is taken from the value of the `kmsgProductServer` message identifier. This message is located in the file `productmessages.xml`, and its value is Oracle BI Server:

```
<WebMessage name="kmsgProductServer" CRC="nnnnnnnnnnnnnnnnnnnn">
  <TEXT>Oracle BI Server</TEXT>
</WebMessage>
```

Some messages, such as those that contain copyright information and product names, are protected and cannot be changed. If you read the file `productmessages.xml`, there is text preceding the `WebMessage` elements indicating that the associated names cannot be changed.

## Customizing Oracle BI Presentation Services XML Messages

This section explains how to change the content of unprotected messages and provides several examples. The intent is to show you how to alter the text of messages, and not to teach you XML.

### To customize messages

- 1 Create message identifiers with similar names and customize their text.
- 2 Create a custom messages folder named `customMessages`.

**NOTE:** Organizations that have Oracle Business Intelligence applications may already have a file present in this folder. This file enables Oracle Business Intelligence support for Oracle Business Intelligence applications, and should not be modified, moved, or deleted.

- 3 Place the messages in one or more XML files in the `customMessages` folder, and then place the `customMessages` folder in this location:

SADATADIR\web\msgdb\I\_xx

where SADATADIR is the data directory, and xx is the language identifier of the selected locale (for example, for english-usa, the identifier is en).

If you are not concerned with multiple languages, place the folder in the I\_en folder. Messages default to I\_en if a language-specific version is not found. You need to create the I\_xx folder in the SADATADIR\web\msgdb folder.

#### 4 Restart Oracle BI Server.

You can create multiple XML files in the customMessages folder, or create a single XML file that holds customized messages, for example, custommessages.xml. This is because the application goes through the customMessages folder and reads every file that has an XML extension, regardless of the file's name. If you create many customized messages you may prefer to organize them into separate files.

**NOTE:** If you intend to support multiple languages, place control messages (which are messages that are not translated) into one file named customcontrolmessages.xml. Place messages that are translated into another file named, for example, customuimessages.xml. This places localized versions of the customuimessages.xml file in each language folder as appropriate, such as \OracleBIData\web\msgdb\I\_de\customMessages, \OracleBIData\web\msgdb\I\_fr\customMessages, and so on.

Links are a special case. Modifications made to link messages display as expected in dashboards and delivers. To make these same modifications display in Answers, you must modify the kuiAnswersMainBar message.

### *To edit a custom message file*

- 1 Make a backup of the original file in a separate folder.
- 2 Make a development copy in a different folder.
- 3 Edit the development version of the file in a text or XML editor.
- 4 Replace the original file in the customMessages folder with the newly edited file.
- 5 Test the new file.
- 6 (Optional) Delete the backup and development copies.

## Resolution of Oracle BI Presentation Services XML Message Name Elements

During initialization, the Oracle BI Presentation Services replaces the WebMessage name default text with text from equivalently named elements in any customized XML file, based on the following precedence order, from highest to lowest:

- XML in SADATADIR\web\msgdb\I\_xx\customMessages folder (language-specific folders), where SADATADIR is the data directory.
- XML in SADATADIR\web\msgdb\I\_en\customMessages folder (for language-specific user logons if WebMessage name elements reside here, but are not in language-specific files).

- XML in SADATADIR\web\msgdb\customMessages folder.
- XML in SAROOTDIR\web\msgdb\l\_xx\messages folder, where SAROOTDIR is the installation directory.
- XML in SAROOTDIR\web\msgdb\messages folder.

As an example, when Oracle BI Presentation Services starts up, it first reads the messages in the folder SAROOTDIR\web\msgdb\l\_xx\messages in the installation directory, and then reads the messages in the folder SADATADIR\web\msgdb\l\_xx\customMessages. It replaces the default text for those messages with the customized text. If you attempt to alter the text of a protected message, a message is displayed in its place indicating that you attempted this.

## Sample Oracle BI Presentation Services XML Template

The following is a sample template for a custommessages.xml file in the folder SADATADIR\web\msgdb\l\_xx\customMessages, where SADATADIR is the data directory. An example custommessages.xml file follows the template.

Every message begins with a <WebMessage name=> element and ends with a </WebMessage> element. The message text that you can customize is contained between <TEXT> elements or <HTML> elements. To suppress the display, delete the text between the elements.

```
<?xml version="1.0" encoding="utf-8"?>
<WebMessageTables>

    <WebMessageTable system="Custom Messages">
        <!-- The name of a message must match the name of the message you are
overriding. -->
        <WebMessage name="kmsgExampleOverridingMessage">

            <!-- A message can have TEXT and/or HTML versions of it. It is not necessary
to have both. (TEXT will be automatically converted to HTML when necessary). -->

            <TEXT>Example message.</TEXT> <!-- Format used in a text only output -->
            <HTML><b>Example message with bold HTML tags.</b></HTML> <!-- Format used
in an HTML output -->

        </WebMessage>
    </WebMessageTable>

</WebMessageTables>
```

### To create a sample template

- 1 Replicate the sample template in a text editor.
- 2 Name the file custommessages.xml (or any name you choose).
- 3 Place the file into the customMessages folder you have created in the appropriate SADATADIR\web\msgdb\l\_xx folder.

## Sample Oracle BI Presentation Services custommessages.xml File

The following example shows four customized messages placed in the custommessages.xml file.

```
<?xml version="1.0" encoding="utf-8"?>
<WebMessageTables>

<WebMessageTable system="Custom Messages">

  <!-- First message -->
    <WebMessage name="kmsgAuthenticateRemembermyIDandpassword">
      <TEXT>Remember my signon name and password.</TEXT>
    </WebMessage>

  <!-- Second message -->
    <WebMessage name="kmsgPrivilegeDisplayAccountUnknown">
      <TEXT>Unknown Account (<Param insert="1"/>). Call the Help Desk at
extension 9999 to set up a new account.</TEXT>
    </WebMessage>

  <!-- Third message --
    <WebMessage name="kmsgWelcomeFrameCreateNewRequest">
      <HTML>Create a <b>new request</b> by clicking on a Subject Area below. After
creating the request, click on the <b>Done</b> button at the bottom of the page.</
HTML>
    </WebMessage>

  <!-- Fourth message -->
    <WebMessage name="kmsgUIAdmin">
      <HTML></HTML>
    </WebMessage>

</WebMessageTable>

</WebMessageTables>
```

- The message identifier of the first message being customized is "kmsgAuthenticateRemembermyIDandpassword". The default text for this message is located in the file logonmessages.xml in the folder SAROOTDIR\web\msgdb\l\_xx\messages, where SAROOTDIR is the installation directory.
- The message identifier of the second message being customized is "kmsgPrivilegeDisplayAccountUnknown". The default text for this message is located in the file viewmessages.xml in the folder SAROOTDIR\web\msgdb\l\_xx\messages, where SAROOTDIR is the installation directory. This message contains a variable, ( <Param insert="1"/> ).

**NOTE:** If you are customizing a message that contains a variable, do not alter the variable. In the UNIX environment, be careful to preserve the case of the message name being customized.

- The message identifier for the third message being customized is "kmsgWelcomeFrameCreateNewRequest". The default text for this message is located in the file searchsysmessages.xml in the folder SAROOTDIR\web\msgdb\l\_xx\messages, where SAROOTDIR is the installation directory. This message is in HTML format and uses an HTML tag ( <b> ) to display text in bold letters.
- The message identifier for the fourth message being customized is "kmsgUIADMIN". The default text for this message is located in the file uimessages.xml in the folder SAROOTDIR\web\msgdb\l\_xx\messages, where SAROOTDIR is the installation directory. This message is in HTML format. This message identifier displays the Admin link at the top of each Answers, Delivers, or dashboard page. Deleting the Admin text between the <HTML> and </HTML> tags suppresses the display of the link.

## Adding a Language Selection to Oracle BI Presentation Services Screens

The Oracle BI Presentation Services login screen and the My Account screen in Answers each include a language selection drop-down list, where users select the language in which they want to work. If a language that you want users to be able to select does not appear in the language selection drop-down list, you can add it.

### *To add a language to the language selection drop-down list on the login and My Account screens*

- 1 Add the l\_xx directory to the SADATADIR\web\msgdb directory, where xx is the language extension for the language that you want to add (for example, en for english-usa) and SADATADIR is the data directory.
- 2 Copy the languagenames.xml file in the SAROOTDIR\web\msgdb\messages directory to the SADATADIR\web\msgdb\messages directory, where SAROOTDIR is the installation directory and SADATADIR is the data directory. (The languagenames.xml file contains the list of languages that are acceptable for the language selection drop-down lists.)
- 3 Use a text editor to open the languagenames.xml file in the SADATADIR\web\msgdb\messages directory.
- 4 Check to make sure that the language that you want to add is not already listed in the file. If it is not listed, make the following entry to add the language:

```
<WebMessage name="kmsgLanguageName_xx">  
<TEXT>LanguageName</TEXT>  
</WebMessage>
```

where xx is the language extension (for example, ar) and *LanguageName* is the name of the language (for example, Arabic).

# Frequently Customized Oracle BI Presentation Services User Interface Messages

Messages that are frequently customized are located in the file `uimessages.xml`. This file contains text strings for display elements and for links throughout the user interface.

For example, the following messages contain the text for the links Admin, Alerts!, and Answers in the user interface. You can customize the text, or delete the text to suppress the display of the link.

```
<WebMessage name="kmsgUI Admin">
  <HTML>Admin</HTML>
</WebMessage>

<WebMessage name="kmsgUI Alerts">
  <HTML>Alerts!</HTML>
</WebMessage>

<WebMessage name="kmsgUI Answers">
  <HTML>Answers</HTML>
</WebMessage>
```

For example, users can export the data for a request to a Microsoft Excel file. If you do not want to support the download to Excel option, you can remove the link.

## *To remove the Download link*

- 1 Open the `viewscontrolmessages.xml` file.
- 2 Copy the following message to the `custommessages.xml` file:

```
<WebMessage name="kmsgEVCDownloadLinks">
  <HTML>
    <a insert="1">
      <MessageRef name="kmsgEVCLI nkDownloadExcel " />
    </a>

    <a insert="2">
      <MessageRef name="kmsgEVCLI nkDownloadData " />
    </a>
  </HTML>
```

- 3 Delete the first message identifier anchor:

```
<a insert="1">
  <MessageRef name="kmsgEVCLI nkDownloadExcel " />
</a>
```

- 4 Save the `custommessages.xml` file.

For more information about the `custommessages.xml` file, read ["Sample Oracle BI Presentation Services custommessages.xml File" on page 196](#).

# Customizing the Appearance of the Oracle BI Presentation Services Login Screens

Users must log in to Oracle BI Presentation Services to gain access to Dashboards, Answers, and other Oracle BI Presentation Services components. The logon process provides a user interface to the Oracle BI Server authentication process.

When Oracle BI Presentation Services is accessed, the user is presented with the default Oracle BI Presentation Services login screen. The user must enter an appropriate Oracle Business Intelligence user name and password. When authentication is complete, the user gains access to the appropriate Oracle BI Presentation Services components, and the user's default dashboard displays. For more information, read [“About Oracle BI Presentation Services User Authentication” on page 142](#).

## *To customize the appearance of the login screens*

- Override the relevant messages in the file `logoncontrolmessages.xml`.

**NOTE:** The Not Logged On screen (`kmsgAuthenticateNotLoggedIn`), used for session timeout, appears only when users are not logged on and attempt to access a URL that does not support direct logon. For example, suppose a user accesses Answers and clicks the Log Off link. If the user clicks the browser's Back button and then clicks the My Account link, the user receives the Not Logged On screen.

For general information about customization the user interface with XML messages, read [“Customizing the Oracle BI Presentation Services User Interface Using XML Message Files” on page 192](#).

**NOTE:** This feature does not allow the Oracle BI Presentation Services Administrator to control how users are actually authenticated. For information about authentication options, read [“About Oracle BI Presentation Services User Authentication” on page 142](#).

# Configuring the Oracle Business Intelligence ReportUI Portlet

The Oracle BI ReportUI Portlet is a software component that displays Oracle BI Presentation Services content in a portlet in a portal server. While the Oracle BI ReportUI Portlet adheres to JSR 168 portlet specifications and should work on any JSR 168-compliant portal server, it has been tested on the following portal servers:

- Oracle Application Server Portal 10.1.4.0.0

Additionally, the Oracle Application Server Portal requires Patch 4900785, and the OC4J instance where the Oracle BI ReportUI Portlet is to be installed requires an installed WSRP Container.

- WebSphere Portal 5.1.0.4

The implementation of the Oracle BI ReportUI Portlet is based on an existing HTML view service provided by the Oracle BI Presentation Services SOAP layer.

The connection schema works as follows:

- 1 The browser displaying the Oracle Application Server Portal or WebSphere Portal contains the Oracle BI ReportUI Portlet that requests an Oracle BI Presentation Services report.
- 2 The Oracle Application Server Portal Server or the WebSphere Portal Server receives the request and forwards it to the Bridge servlet in the Oracle BI Presentation Services Portlets Web Application.
- 3 The Bridge servlet contacts Oracle BI Presentation Services.
- 4 Oracle BI Presentation Services delivers the report information to the ReportUI portlet in the Oracle BI Presentation Services Portlets Web Application.
- 5 The ReportUI portlet sends the information to the Oracle Application Server Portal Server or WebSphere Portal Server which forwards it on to the user's web browser for display.

## Installing and Configuring the Oracle BI ReportUI Portlet

These instructions assume that you have installed the Oracle Application Server Portal Server or WebSphere Portal Server according to the manufacturer's instructions and have started the Oracle Application Server Portal Server or WebSphere Portal Server. A complete installation consists of the following activities:

- ["Editing the portlet.xml file to configure Oracle BI ReportUI Portlet" on page 200](#)
- ["Deploying the Oracle BI ReportUI Portlet" on page 203](#)
- ["Configuring Authentication in the Oracle BI ReportUI Portlet" on page 203](#)

## Editing the portlet.xml file to configure Oracle BI ReportUI Portlet

Before you deploy the Oracle BI ReportUI Portlet, you need to edit the portlet.xml file to specify the URL for Oracle BI Presentation Services as well as some administrator credentials.

The portlet.xml file is delivered as part of the sawjsr168portlets.war file, a Web Archive (WAR) file located in the SAROOTDIR/web/skd folder (where SAROOTDIR is the installation directory).

### *To edit the portlet.xml file*

- 1 Create an empty folder named {portletconfig} (where portletconfig is any name you choose for the folder) in which to expand the sawjsr168portlets.war file.
- 2 Locate the sawjsr168portlets.war file in the SAROOTDIR/web/skd folder (where SAROOTDIR is the installation directory) and copy it to the {portletconfig} folder.
- 3 Make the {portletconfig} folder the current folder and expand sawjsr168portlets.war using the jar utility included with the JDK installation:

```
jar -xf sawjsr168portlets.war
```



- 4 Use a text editor to open the portlet.xml file in {portletconfig}/WEB-INF.
- 5 Set the value element for each of the following preference/name elements:

Element	Value
oracle.bi.presentation.sawserver.URL	The access URL of Oracle BI Presentation Services. It includes the part of the URL before the question mark. It usually ends with saw.dll.  Default value is: http://localhost/analysis/saw.dll
oracle.bi.presentation.portlets.jsr168.reportui.AdminUserName	The user name of the Oracle Business Intelligence administrator.  Required when authentication is done by administrative credentials. For more information see <a href="#">"Configuring Authentication in the Oracle BI ReportUI Portlet" on page 203</a> .
oracle.bi.presentation.portlets.jsr168.reportui.AdminPwd	The password for the Oracle Business Intelligence administrator.  Required when authentication is done by administrative credentials. For more information see <a href="#">"Configuring Authentication in the Oracle BI ReportUI Portlet" on page 203</a> .
oracle.bi.presentation.portlets.websphere.SuperuserSlotId	(For WebSphere Portal only) The name of WebSphere Shared Credential Vault Slot, which holds the administrative user name and password for Oracle BI Presentation Services identified by the URL above.  Used when authentication is done by administrative credentials. For more information see <a href="#">"Configuring Authentication in the Oracle BI ReportUI Portlet" on page 203</a> .  For more information about WebSphere Shared Credential Vault Slot, see the WebSphere Portal documentation.

- 6 Make the {portletconfig} folder the current folder and update sawjsr168portlets.war using the jar utility included with the JDK installation:

```
jar -uf sawjsr168portlets.war WEB-INF/portlet.xml
```

## Example of portlet.xml

The following XML file is an example of the portlet.xml file:

```
<?xml version="1.0" encoding="UTF-8" ?>
<portlet-app xmlns="http://java.sun.com/xml/ns/portlet/portlet-app_1_0.xsd"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:schemaLocation="http://java.sun.com/xml/ns/portlet/portlet-app_1_0.xsd http://
  java.sun.com/xml/ns/portlet/portlet-app_1_0.xsd" version="1.0"
  id="Oracle Business Intelligence Report View Portlet Application">
  <portlet>
    <portlet-name>Oracle Business Intelligence Report View Portlet</portlet-name>
    <portlet-class>com.siebel.analytcs.web.portlets.jsr168.ReportUI</portlet-class>
    <expiration-cache>0</expiration-cache>
    <supports>
      <mime-type>text/html</mime-type>
      <portlet-mode>edit</portlet-mode>
      <portlet-mode>edit_defaults</portlet-mode>
    </supports>
    <portlet-info>
      <title>Oracle Business Intelligence Report View Portlet</title>
    </portlet-info>
    <portlet-preferences>
      <preference>
        <name>oracle.bi.presentation.report.Path</name>
        <value/>
        <read-only>>false</read-only>
      </preference>
      <preference>
        <name>oracle.bi.presentation.report.ViewName</name>
        <value />
        <read-only>>false</read-only>
      </preference>
      <preference>
        <name>oracle.bi.presentation.sawserver.URL</name>
        <value>http://localhost/analytcs/saw.dll</value>
        <read-only>>false</read-only>
      </preference>
      <preference>
        <name>oracle.bi.presentation.portlets.jsr168.reportui.AdminUserName</name>
        <value/>
        <read-only>>false</read-only>
      </preference>
      <preference>
        <name>oracle.bi.presentation.portlets.jsr168.reportui.AdminPwd</name>
        <value/>
        <read-only>>false</read-only>
      </preference>
      <preference>
        <name>oracle.bi.presentation.portlets.websphere.SuperuserSID</name>
        <value/>
        <read-only>>false</read-only>
      </preference>
    </portlet-preferences>
  </portlet>
  <custom-portlet-mode>
    <description xml:lang="en">This mode signifies that the portlet should render a
    screen to set the default values for the read-only preferences that are typically changed
```

in the EDIT screen. Calling this mode requires that the user must have administrator rights. </description>

```
<portlet-mode>edit_default</portlet-mode>
</custom-portlet-mode>
</portlet-app>
```

## Deploying the Oracle BI ReportUI Portlet

The Oracle BI ReportUI Portlet is packaged in the sawjsr168portlets.war file located in the SAROOTDIR/web/skd folder (where SAROOTDIR is the installation directory). To deploy it, follow the instructions in the Portal documentation.

**TIP:** When deploying the Oracle BI ReportUI Portlet on the Oracle Application Server Portal, first deploy the sawjsr168portlets.war file as a Web application in the OC4J instance that supports Web Services for Remote Portals (WSRP). Then, to test that the deployment was successful, access this URL:

`http://{Portal server host}:{Portal server port}/{Portlet application URL}/portlets?WSDL`

This URL should return a valid WSDL document.

**TIP:** If the Oracle BI ReportUI Portlet deployment fails, try deploying some other portlet to make sure that the portal server is working correctly.

## Configuring Authentication in the Oracle BI ReportUI Portlet

To authenticate users, the Oracle BI ReportUI Portlet retrieves the login name for the current user from the Portal and passes it to Oracle BI Presentation Services. In order for Oracle BI Presentation Services to trust that the name of the authenticated user, Oracle BI Presentation Services needs to verify that the login name is from a trusted source. You can use one of two approaches to accomplish this verification:

- **Authenticate with administrative credentials** — With this approach, the Portlet remembers the credentials of the Oracle BI Administrator (that is, user name and password) and passes them to Oracle BI Presentation Services along with the login name of the current user. Because Oracle BI Presentation Services knows the user name and password of the Oracle BI Administrator, it knows that it can trust that the login name of the current user is actually the name of the user who was properly authenticated.
- **Authenticate with SSL certificates** — With this approach, the Portal authenticates itself to Oracle BI Presentation Services using SSL certificates.

### *To configure authentication using administrative credentials*

- Set the following elements in the portlet.xml file:
  - For the Oracle Application Server Portal:
    - `oracle.bi.presentation.portlets.jsr168.reportui.AdminUserName`

■ oracle.bi.presentation.portlets.jsr168.reportui.AdminPwd

■ For the WebSphere Portal: oracle.bi.presentation.portlets.websphere.SuperuserSlotId

For more information on editing the portlet.xml file, see [“Editing the portlet.xml file to configure Oracle BI ReportUI Portlet” on page 200](#).

### *To configure authentication using SSL certificates*

**NOTE:** These procedures assume that you are familiar with general SSL concepts and the administration of the Web server running the Bridge servlet and the Portal server.

**1** In the portlet.xml file, make sure that the following elements are set to empty strings:

■ oracle.bi.presentation.portlets.jsr168.reportui.AdminUserName

■ oracle.bi.presentation.portlets.jsr168.reportui.AdminPwd

For more information on editing the portlet.xml file, see [“Editing the portlet.xml file to configure Oracle BI ReportUI Portlet” on page 200](#).

**2** Create and sign two SSL certificates for the Web server running the Bridge servlet and the Portal server. Make sure that the Web server certificate includes the proper domain name system (DNS) name of the Web server.

**3** For the Web server running the Bridge servlet, configure the server to:

■ Accept “https” connections. Be sure to test that you can access Oracle BI Presentation Services from the browser using “https” and that the Browser does not display a Domain Name Mismatch Security Error.

■ Accept client certificates.

For example, in Tomcat, you configure SSL parameters as attributes of the Connector element of the server.xml file, where the clientAuth=“want” attribute enables client certificates and the truststoreFile attribute identifies the certificate for the certificate authority that was used for signing the Portal server certificate.

**4** Configure the Oracle Application Server Portal or WebSphere Portal to accept client certificates.

For example, for the Oracle Application Server Portal, you can edit the Java command line and specify Java properties related to SSL. To do so, display the Administration screen for the OC4J instance that supports WSRP and select the Server Properties link. Then, in the Java Options files, add SSL properties to configure the trust store and the key store, for example:

```
-Djavax.net.ssl.trustStore=D:/certificates/jsr168portal.keystore  
-Djavax.net.ssl.keyStorePassword=password  
-Djavax.net.ssl.keyStore=D:/certificates/jsr168portal.keystore
```

where -Djavax.net.ssl.trustStore identifies the certificate of the certificate authority that was used for signing the Web server running the Bridge servlet and -Djavax.net.ssl.keyStore identifies the certificate of the certificate authority that was used for signing the Portal server.

**5** Configure the Bridge servlet to recognize the Portal certificate by adding the com.oracle.bi.web.TrustedRemoteDNs element (which identifies the list of Distinguished Names (DNs) of trusted certificates, with each DN separated by a semicolon) to the Web server’s web.xml file, for example:

```
<param-name>com.oracle.bi.web.TrustedRemoteDNs</param-name>
<param-value>
    CN=Portal, OU=OrgUnit, O=Organization, L=City, ST=State, C=Country
</param-value>
```

When the Bridge servlet receives a trusted certificate, it extracts the CN value and passes it to Oracle BI Presentation Services as the current remote user.

- 6 Configure Oracle BI Presentation Services to allow authentication of remote users without a password via SOAP by setting the EnableWebServerAuthInSoap element to Y in the Oracle BI Presentation Services configuration file (instanceconfig.xml).

For information about working in the Oracle BI Presentation Services configuration file (instanceconfig.xml), read ["Making Oracle BI Presentation Services Configuration Changes" on page 15](#).

- 7 Enable Oracle BI Presentation Services to retrieve the user password for the Portal user from the credential store. There are two ways to do this:

- If security is a concern, create an entry in the Oracle BI Presentation Services credential store with the key that matches the value of the CN attribute of the Portal certificate. For more information about the Oracle BI Presentation Services credential store, see *Oracle Business Intelligence Enterprise Edition Deployment Guide*.

- If security is not a concern:

- Add the following entry to the instanceconfig.xml file:

```
<CredentialStore>
  <CredentialStorage type="file" path={full_path_to_credential_store}/>
</CredentialStore>
```

- Create a credentialstore.xml file. For more information, see *Oracle Business Intelligence Enterprise Edition Deployment Guide*.



# Integrating Oracle BI Presentation Services into Corporate Environments Using HTTP

This chapter explains the HTTP methods that you can use to integrate Oracle BI Presentation Services into your corporate environment. Oracle BI Presentation Services provides entry points for most functionality exposed in the system. Calls can be made through HTTP using a simple URL syntax or JavaScript commands. In UNIX, interfaces are exposed through a Java Servlet. This chapter contains the following topics:

- [Incorporating Oracle Business Intelligence Results into External Portals or Applications Using the Go URL on page 207](#)
- [Referencing Dashboard Content in External Portals or Applications Using the Oracle BI Presentation Services Dashboard URL on page 210](#)
- [Using the Oracle BI Presentation Services Go URL to Issue SQL and Pass Filters on page 212](#)
- [Example of an Oracle Business Intelligence Third-Party SQL Tool Integration on page 217](#)

## Incorporating Oracle Business Intelligence Results into External Portals or Applications Using the Go URL

This section describes how to use the Oracle BI Presentation Services Go URL to incorporate results into external portals or applications. It contains the following topics:

- [“About the Oracle BI Presentation Services GO URL” on page 207](#)
- [“Structure of the Basic Oracle BI Presentation Services Dashboard URL” on page 211](#)
- [“Optional Parameters for the Oracle BI Presentation Services Go URL” on page 208](#)

### About the Oracle BI Presentation Services GO URL

The Oracle BI Presentation Services Go URL command is for use in incorporating specific Oracle Business Intelligence results into external portals or applications. The Go URL is used when you add a result to your favorites, or add a link to a request to your dashboard or an external Web site. It has a number of forms and optional arguments that can be used to control its behavior.

You can post the Go URL as a Form or issue it as a URL. If you are issuing parameters as part of a URL, they need to be escaped properly. You need to replace spaces with plus ( + ) signs, and so on. For example, to pass East Region as a value, type East+Region.

When called from within an Oracle BI Presentation Services screen, such as a dashboard or an HTML result view, the URL should begin with the following characters:

saw. dl I ?Go

When called from another screen on the same Web server, the URL should begin with the following characters:

```
/Anal yti cs/saw. dl I ?Go
```

When referenced from a screen on a different server (or sent through email, and so on), the URL should begin with the fully qualified server name or IP address:

```
http: //server_name_or_i p_address/Anal yti cs/saw. dl I ?Go
```

To test these commands, you can enter the fully qualified version into the Address field in Internet Explorer.

### Structure of the Basic Oracle BI Presentation Services Go URL

The basic Go URL command needs the full Presentation Catalog path to the request to execute. It returns the default result view, which is defined in the request.

For example, the following go URL command returns the default result view as defined in the request, where SB2 is the name of the request to execute.

```
saw. dl I ?Go&Path=/Shared/Test/SB2
```

### Optional Parameters for the Oracle BI Presentation Services Go URL

You can modify the behavior of the Go URL command by adding one or more of the following parameters. If an invalid URL is specified (for example, you type a parameter incorrectly), the browser displays a “The page cannot be found” error with the detailed text of “HTTP 400 - Bad Request.”

**NOTE:** In parameter descriptions, SB2 is the name of the request to execute.

- **User ID and Password.** The user is prompted for user ID and password if this information has been omitted from the request and if the user has not chosen the option to have logon information remembered.

This is the format, where uuu is the user ID and ppp is the password:

```
&NQUser=uuu&NQPassword=ppp
```

Example:

```
saw. dl I ?Go&Path=/Shared/Test/SB2&NQUser=user1&NQPassword=rock
```

This logs on as user1 with a password of rock, and executes the request.

- **Link Options.** The results will include links.

This is the format:



&Options=x

The x can be one or more of the following letters:

Letter	Link
m	Modify Request
f	Printer Friendly
d	Download to Excel
r	Refresh Results

Example:

saw.dll?Go&Path=/Shared/Test/SB2&Options=md

This displays results with the links Modify Request and Download.

- **Printer Friendly.** Results are in a printer-friendly format, without the paging controls, hot links, and so on.

This is the format:

&Action=print

Example:

saw.dll?Go&Path=/Shared/Test/SB2&Action=Print

- **Application Friendly.** Results are displayed in an application-friendly format, such as for Microsoft Excel, without the paging control, hot links, and so on.

This is the format:

= &Action=Extract

Example:

saw.dll?Go&Path=/Shared/Test/SB2&Action=Extract

The Extract action also acts as a Navigate action (read [“Passing Filters to the Oracle BI Presentation Services Go URL Through a URL \(Navigation\)” on page 212](#)) so you can filter the results that are returned by the call.

- **Specific View.** This shows an individual result view rather than the default compound view.

This is the format, where xx is the name of the view:

saw.dll?Go&Path=/Shared/Test/SB2&ViewName=xx

Example:

saw.dll?Go&Path=/Shared/Test/SB2&ViewName=Chart

Assuming that the request contains a Chart view named Chart, this displays just the Chart view.

- **Specific Style.** This shows the results using a specified style. If the style does not exist, the default is used.

This is the format, where xx is the name of the style:

```
saw. dl I ?Go&Path=/Shared/Test/SB2&Style=xx
```

Example:

```
saw. dl I ?Go&Path=/Shared/Test/SB2&Style=Lime
```

This uses the style named Lime to show the results.

- **Result Format.** This controls the format of the results.

This is the format, where xx is XML or HTML:

```
saw. dl I ?Go&Path=/Shared/Test/SB2&Format=xx
```

Example:

```
saw. dl I ?Go&Path=/Shared/Test/SB2&Format=XML
```

This shows results in XML.

### Displaying All Records in a Table

There are two ways to display all the records in the table:

- Set the Rows per Page property on the Table view to 10,000, and then use the basic Go. This is the easier of the two methods.
- Issue the following URL, assuming the View to control is called Table:

```
saw. dl I ?Go&Path=/Shared/Test/SB2&Action=Scroll&P5=-1&ViewID=go~Table
```

## Referencing Dashboard Content in External Portals or Applications Using the Oracle BI Presentation Services Dashboard URL

This section describes how to use the Oracle BI Presentation Services Dashboard URL. It contains the following topics:

- [“About the Oracle BI Presentation Services Dashboard URL” on page 211](#)
- [“Structure of the Basic Oracle BI Presentation Services Dashboard URL” on page 211](#)
- [“Optional Parameter for the Oracle BI Presentation Services Dashboard URL” on page 211](#)

## About the Oracle BI Presentation Services Dashboard URL

The Oracle BI Presentation Services Dashboard URL is for use in incorporating or referencing the content of a specific dashboard in external portals or applications. It has a number of forms and optional arguments that can be used to control its behavior.

You can post the Dashboard URL command as a Form or issue it as a URL. If you are issuing parameters as part of a URL, they need to be escaped properly. You need to replace spaces with plus ( + ) signs, and so on. For example, to pass East Region as a value, type East+Region.

When called from within an Oracle BI Presentation Services screen, such as a dashboard or an HTML result view, the URL should begin with this:

```
saw. dl I ?Dashboard
```

When called from another screen on the same Web server, the URL should begin with this:

```
/Anal yti cs/saw. dl I ?Dashboard
```

When referenced from a screen on a different server (or sent through email, and so on), the URL should begin with the fully qualified server name or IP address:

```
http: //server_name_or_i p_address/Anal yti cs/saw. dl I ?Dashboard
```

To test these commands, you can enter the fully qualified version into the Address field in Internet Explorer.

## Structure of the Basic Oracle BI Presentation Services Dashboard URL

The basic Dashboard URL command needs no parameters. It displays the user's default portal, after authenticating the user.

This is the format:

```
saw. dl I ?Dashboard
```

## Optional Parameter for the Oracle BI Presentation Services Dashboard URL

You can modify the behavior of the Dashboard URL command by adding the user ID and password parameters. If the parameters are omitted, then the user is prompted for user ID and password information, unless the user chose the option to have logon information remembered when last logged on. If using a Session ID or Ticket, pass it as the NQUser parameter. In the parameter description, SB2 is the name of the request to execute.

This is the format, where uuu is the user ID, and ppp is the password:

```
&NQUser=uuu&NQPassword=ppp
```

Example:

```
saw. dl I ?Go&Path=/Shared/Test/SB2&NQUser=user1&NQPassword=rock
```

This logs on as user1 with a password of rock, and displays the dashboard.

If an invalid URL is specified (for example, you type a parameter incorrectly), the browser returns the “The page cannot be found” error with detailed text of “HTTP 400 - Bad Request.”

## Using the Oracle BI Presentation Services Go URL to Issue SQL and Pass Filters

This section explains how to use the Go URL command to issue SQL, and how to pass filters to be used for navigation. It contains the following topics:

- [“Issuing SQL Using the Oracle BI Presentation Services Go URL” on page 212](#)
- [“Passing Filters to the Oracle BI Presentation Services Go URL Through a URL \(Navigation\)” on page 212](#)

### Issuing SQL Using the Oracle BI Presentation Services Go URL

The Go URL command can be used to issue Oracle Business Intelligence SQL. These forms of the Go URL return tabular results. The basic options from &Style= and &Options= can be used here as well.

To issue Oracle Business Intelligence's simplified SQL, include the escaped SQL as a parameter to the Go URL. For example:

```
saw. dl I ?Go&SQL=select+Regi on, DoI l ars+from+Suppl i erSal es
```

where the FROM clause is the name of the Subject Area to query.

Alternatively, the command IssueRawSQL can be used to bypass the Web processing and issue SQL directly against the Oracle BI Server.

### Passing Filters to the Oracle BI Presentation Services Go URL Through a URL (Navigation)

The Go URL can also be used to pass context such as filters to a destination request. This is done by adding additional parameters to the call. You need to make sure that any columns you are passing are set up in the destination with Is Prompted filters, or specific default filters.

#### Navigation Parameters

The basic syntax of the navigation command is the same as presented in the section [“Structure of the Basic Oracle BI Presentation Services Dashboard URL” on page 211](#), but with the addition of the Action=Navigate parameter, and then population of the P1 - Pn parameters, as necessary.

&Action=Navigate

&P0=n where n is the number of columns you wish to filter, currently 1 - 6.

&P1=op where op is one of the following operators.

Operator	Meaning
eq	Equal to or in.
neq	Not equal to or not in.
lt	Less than.
gt	Greater than.
ge	Greater than or equal to.
le	Less than or equal to.
bwith	Begins with.
ewith	Ends with.
cany	Contains any (of the values in &P3).
call	Contains all (of the values in &P3).
like	You need to type %25 in place of the usual % wildcard. See the examples that follow.
top	&P3 contains 1+n, where n is the number of top items to display.
bottom	&P3 contains 1+n, where n is the number of bottom items to display.
bet	Between (&P3 must have two values).
null	Is null (&P3 must be 0 or omitted).
nnul	Is not null (&P3 must be 0 or omitted).
&P2=ttt.ccc	In this parameter, ttt is the table name and ccc is the column name. If the table or column contains spaces, it must be quoted with double-quotes. Spaces should be escaped as %20, for example, Measures."Dollar%20Sales".
&P3=n+xxx+yyy+...+zzz	<p>In this parameter, n is the number of values, and xxx, yyy, and zzz are the actual values.</p> <p><b>NOTE:</b> If the value of P3 begins with a numeric character, the entire value must be enclosed in quotes. For example:</p> <p>saw.dl I ?Go&amp;Path=/Shared/Test/ SB2&amp;Action=Navigate&amp;P0=1&amp;P1=top&amp;P2=Customers.Region&amp;P3="7West"</p>

**NOTE:** The settings for &P1,&P2, and &P3 are repeated for &P4-P6, &P7-P9, &P8-P10, &P11-P13,

&P14-P16, and &P17-P19 as necessary, depending on the value of &P0.

## Navigation Examples

This returns records for the East and Central regions:

```
saw.dll?Go&Path=/Shared/Test/  
SB2&Action=Navigate&P0=1&P1=eq&P2=Customers. Region&P3=2+Central +East
```

This returns records for like Regions E....t:

```
saw.dll?Go&Path=/Shared/Test/  
SB2&Action=Navigate&P0=1&P1=like&P2=Customers. Region&P3=1+E%25t
```

This returns the top two regions by dollars sold:

```
saw.dll?Go&Path=/Shared/Test/  
SB2&Action=Navigate&P0=1&P1=top&P2="Sales%20Facts". Dollars&P3=1+2
```

This is an example where the number of arguments is not included in the syntax:

```
saw.dll?Go&Path=/Shared/Test/  
SB2&Action=Navigate&P0=1&P1=top&P2=Customers. Region&P3=Central
```

**NOTE:** You can omit the number of arguments only if just one argument value is included.

This returns records with between 2,000,000 and 2,500,000 in sales:

```
saw.dll?Go&Path=/Shared/Test/  
SB2&Action=Navigate&P0=1&P1=top&P2="Sales%20Facts". Dollars&P3=2+2000000+2500000
```

This returns records for Regions beginning with the letter E:

```
saw.dll?Go&Path=vate&P0=1&P1=bw ith&P2=Customers. Region&P3=1+E
```

This returns records for Regions containing the letter E and having more than 20 million in sales:

```
saw.dll?Go&Path=/Shared/Test/  
SB2&Action=Navigate&P0=2&P1=cany&P2=Customers. Region&P3=1+e&P4=gt&P5="Sales%20Facts". Dollars&P6=1+20000000
```

Oracle BI Presentation Services navigation is currently supported from charts, table and pivot table views, HTML views, and external applications and Web pages. The destination search should have filters defined on columns for which it wants to receive context. These can be specific filters or, usually, the Is Prompted filter. In addition to the Table.Column value specifically referenced in the navigation call, all filters from the source request that have corresponding table.columns in the destination, are applied to the destination. Therefore, the appropriate context from a source can be passed to the destination.

## Navigation from Charts

From the chart properties screen, check the Navigate radio button and enter the full path to the saved search or portal that you are interested in the field provided, for example:

```
/shared/topaz/performance/transaction details
```

## Navigation Using JavaScript

Navigation can currently be accomplished using the custom text/date formatter for a column. The central concept is that you add a column you want to navigate from to your search. You then choose Custom Text Format from the properties for the column, and enter HTML that calls one of the two provided JavaScript functions. This technique can be used to perform many actions, including sorting columns, calling custom JavaScript functions, and so on.

Oracle BI Presentation Services includes two JavaScript functions that enable navigation from Table and Pivot views: GoNav and PortalNav. (These functions are located in SAROOTDIR\web\app\res\b\_mozilla\viewhelper.js [where SAROOTDIR is the installation directory] if you are interested in seeing what they do.) The former handles navigation to a specific search. The latter handles navigation to a specific dashboard. A description of their syntax follows, along with example Custom Text formats that you can use to implement navigation.

**NOTE:** To control the look of the navigable text using the style sheet, Oracle BI Presentation Services is standardized on the class=Nav.

### GoNav function

function GoNav(event, sPath, sTbl, sCol, sVal, sTarget) where:

event = event indicator.

sPath = the catalog path of the destination search.

sTbl = the logical table name to filter.

sCol = the logical column name to filter.

sVal = the value to filter by.

sTarget (optional) = "\_blank" to open a new browser window with the results.

### Sample Custom Text Format for GoNav Call

The GoNav and PortalNav calls can be wrapped in an HTML statement (include the quotes):

```
[html]"<font class=nav onclick=\"JavaScript: GoNav(event, '/shared/topaz/performance/transaction details', 'Transaction', 'Quality', '\"@\"');\">\"@\"</font>
```

Table 21 explains the elements of this example.

Table 21. Elemental Analysis of a GoNav Call

Element	Description
[html]	Tells Oracle BI Presentation Services to interpret the following text as HTML. Note, that every "less than" character (<) must be preceded by a double quote (") if the intent is to use it in an HTML tag.
"<font	An HTML tag that a JavaScript call can be attached to. You could potentially use <div>, <span>, <a>, and so on.
class=nav	The CSS style class used for formatting of the HTML tag.

Table 21. Elemental Analysis of a GoNav Call

Element	Description
<code>onclick=\"JavaScript: GoNav('event, /shared/topaz/performance/transaction details','Transaction',' Quality','"@');\"</code>	The method to call a JavaScript function. When the user clicks on the contents of this HTML tag, then the JavaScript function is called.
<code>&gt;</code>	The end of the font tag.
<code>"@"</code>	Instructs Oracle BI Presentation Services to replace the at sign (@) with the actual column value. When [html] is used, the @ symbol must be surrounded by quotes.
<code>&lt;/font&gt;</code>	The closing tag to match the <code>&lt;font&gt;</code> tag.

This example of GoNav places this HTML on the dashboard:

```
<a href="javascript: GoNav(event, ' /shared/topaz/performance/transaction details', ' Transaction', ' Quality', ' Some value'); ">Click here to navigate to Transaction Details with ' Some value' </a>
```

### PortalNav Function

`function PortalNav(event, sPortal, sTbl, sCol, sVal)`

`event` = event indicator.

`sPortal` = the catalog path of the destination portal.

`sTbl` = the logical table name to filter.

`sCol` = the logical column name to filter.

`sVal` = the value to filter by.

### Sample Custom Text Format for PortalNav Call

Make sure to include the quotes exactly as shown.

```
"<font class=nav onclick=\"JavaScript: Portal Nav(event, ' /shared/topaz/_portal /transaction analysis', ' Transaction', ' Type', ' "@');\">"@"</font>"
```

## Navigation from HTML Results

This is the same as described in [“Navigation Using JavaScript” on page 215](#), but rather than using a custom formatter, type in the HTML syntax with static values in place of the @ signs.



## Example of an Oracle Business Intelligence Third-Party SQL Tool Integration

This section illustrates the requirements for integrating a third-party SQL tool with Oracle Business Intelligence by describing an example integration, using Microsoft Access. Because Oracle Business Intelligence is designed as a middleware platform for enterprise data access and integration, common report writers and business intelligence tools can communicate natively with the Oracle BI Server.

Most third-party SQL tools require the user to include join conditions within queries to avoid cross-joins. A cross-join occurs when a request does not have a WHERE clause, which, in turn creates a Cartesian product of the tables involved in the join. The size of a Cartesian product is the number of rows in the first table multiplied by the number of rows in the second table.

To integrate Microsoft Access with the Oracle BI Server, the Oracle BI Server Administrator must expose the keys within the Presentation layer of the Oracle BI Administration Tool.

### *Example of integrating a third-party SQL tool*

- 1** Drag and drop the keys from the Business Model and Mapping layer to the Presentation layer and save the repository.
- 2** Open Microsoft Access, select the option Blank Access Database, type the name siebel-analytics.mdb when prompted, and click Create.
- 3** After creating the new Microsoft Access database, right-click in the white section of the screen and select Link Tables.
- 4** From the Files of Type drop-down list box, select ODBC Databases.  
The Select a Source Dialog appears, and prompts you for a Data Source Name.
- 5** Click the Machine Data Source tab, locate the Analytics\_Web DNS, and click OK.  
The Oracle BI Server requires a login.
- 6** Type your user ID and password.  
The Import Objects dialog box appears.
- 7** Click the Select All button, or highlight the desired logical tables from Oracle Business Intelligence.  
The import may take a while to complete.
- 8** When the import completes, right-click in the white section of the screen and select Relationships:
  - a** Add the desired tables and drag and drop the keys from the dimension tables (Period, Market, Product) to the fact table (Sales Measures).

- b** Drag and drop Period Key over the perkey column, and repeat for each corresponding key to create the joins.

Now, you can test and run a request.

- 9** Select Create query in Design view from the Queries button:
  - a** Select Markets, Products and Sales Facts.
  - b** Add Region, Brand, Units and Dollars, respectively, and then click Run.

# Index

## A

**Access (Microsoft), example of integrating with Oracle Business Intelligence** 217

**action links, creating** 79

**actions, user-initiated administration** 173

**adding permissions** 152

**administering**

cache entry, clearing associated with a request 22

cache, accessing 29

cache, specifying least amount of time entry can exist 30

cache, specifying least amount of time entry can exist after use 30

cache, specifying maximum time entry can exist 30

configuration changes, about making 15

configuration file path, setting 17

cookie domain information, specifying 31

cookie domain path, overriding 31

cookie domain, list of tasks 31

cookie, specifying expiration date 31

default language, specifying for login screen 35

fully qualified URLs, specifying generation of 35

log users off automatically, setting time 23

logged on users and running requests, viewing information 19

nonprimary resource files, specifying location 34

nonprimary resource files, specifying path 35

ODBC DSN, changing 17

open record sets, specifying maximum number 31

primary resource files, specifying location 33

primary resource files, specifying path 34

query file, viewing for request information 22

remember user's names and passwords, disabling 18

running requests, canceling all requests 21

running requests, canceling one request 21

static URLs, specifying how generated 33

time to expire, setting for client sessions 22

unattended request, setting time to cancel 23

unsaved request, setting time to keep 22

URLs, generating and resource file location 32

URLs, specifying how generated 32

Web cache, clearing 21

**administration actions, user-initiated** 173

**administrator-defined Presentation Services groups, about** 139

**alternating bars, changing color** 65

**ampersand in time zone values** 27

**Answers**

cache, accessing 29

customizing, about and file location 191

custommessages.xml file, sample 196

download (Excel) hyperlink, removing 198

Oracle BI Presentation Services WebMessage name tags, resolution of 194

portals or intranets, integrating into 88

user interface messages, frequently customized 198

user interface, about customizing using XML message files 192

XML message files, customizing 193

XML message files, structure of 193

XML message files, support of multiple languages 194

XML template, sample 195

**Answers, administering**

chart cache, specifying the location of temporary storage 51

chart image server, managing settings 49

chart image type, specifying 50

chart navigation, specifying the URL 52

charting settings, managing 51

currency, specifying for customized subject areas 55

default currency, changing 54

default Flash download source, modifying 50

download prompt for new Flash versions, enabling 50

Flash, about downloading and using as default 50

folders, nesting in selection pane 55

interactive behavior of charts, specifying 52

navigation and drill down, adding support

- for 54
  - pivot table settings, configuring 52
  - pivot table, specifying maximum number of populated cells 53
  - pivot table, specifying maximum number of records to process 53
  - table view, configuring maximum number of rows 53
- antivirus software, blocking iBot script calls** 68
- APIs**
  - Dashboard URL, using 210
  - GO URL 207
  - SQL, issuing using the Go command 212
  - third-party SQL tool, integrating example 217
- application programming interfaces**
  - See APIs
- archiving**
  - catalog folders 109, 132
  - objects 98
  - Presentation Catalog 109, 132
- attributes file** 95
- authentication**
  - configuring in Oracle BI ReportUI Portlet 203
  - database authentication, about 143
  - external table authentication, about 143
  - internal authentication, about 143
  - LDAP authentication, about 142
  - process described 142
  - system session variables, configuring 143
  - user authentication, about 138
- authority level** 167
- authorizing users to act for others** 167

## B

- b\_mozilla\_4 folder** 65
- bars, changing color for alternating bars** 65
- Bots**
  - See iBots
- Briefing Book links, setting number** 87
- browser client sessions**
  - time to expire, setting for client connections 18
  - time to expire, setting for client sessions 22
- browser preference in Catalog Manager** 126

## C

- cache settings, managing**
  - cache, accessing 29
  - cache, specifying least amount of time entry can exist 30
  - cache, specifying least amount of time entry can exist after use 30
- cache, specifying maximum time entry can exist 30
- open record sets, specifying maximum number 31
- cache, managing for the Presentation Catalog** 97
- captions, localizing for Presentation Catalog** 129
- cascading style sheets, working with**
  - cascading style sheets, for more information on 190
  - dashboard banner image, customizing example 190
  - dashboard user interface, files that affect 189
  - location of 188
  - new dashboard style, creating 190
- case of logon names** 74
- catalog**
  - catalog structure, about folders 162
  - catalog structure, recommended folder structure (diagram) 162
  - items, using Catalog Manager to set permissions 124
  - Presentation Services group, about creating 162
- catalog folders**
  - administering 110
  - archiving 109, 132
  - unarchiving 132
- Catalog Manager**
  - about 115
  - about upgrading to a newer version of Presentation Catalog 132
  - archiving a Presentation Catalog 132
  - browser preference 126
  - components of 120
  - copying and pasting items between Presentation Catalogs 122
  - creating reports to display Presentation Catalog data 129
  - localizing Presentation Catalog captions 129
  - localizing Presentation Catalog text strings 130
  - previewing objects 126
  - recommendations for working with 116
  - renaming items 123
  - searching for and replacing Presentation Catalog text 127
  - searching for Presentation Catalog items 121
  - setting permissions of items 124
  - shared Presentation Catalog folders, showing hidden items 111

- starting 116
  - unarchiving a Presentation Catalog 132
  - viewing and editing objects in XML 125
  - working with item properties 123
  - workspace 119
  - Change/Delete permission**
    - about 147
    - granting, about 71
    - group, setting to share requests within a group 148
  - changing permissions** 151
  - chart cache, specifying the location of temporary storage** 51
  - chart image server, managing settings**
    - about 49
    - chart image type, specifying 50
    - default Flash download source, modifying 50
    - download prompt for new Flash versions, enabling 50
    - Flash, about downloading and using as default 50
  - chart navigation, specifying URL** 52
  - charting settings, managing**
    - about 51
    - chart cache, specifying the location of temporary storage 51
    - chart navigation, specifying the URL 52
    - interactive behavior of charts, specifying 52
  - client sessions**
    - close, setting time to 18
    - remove, setting time to 22
  - colors, changing alternating bar color** 65
  - command line options for Javahost service** 38
  - command line properties for Javahost service** 41
  - committing an object to production** 98
  - Common folder, about** 164
  - components of Catalog Manager** 120
  - configuration**
    - cache, accessing 29
    - cache, specifying least amount of time entry can exist 30
    - cache, specifying least amount of time entry can exist after use 30
    - cache, specifying maximum time entry can exist 30
    - changes, about making 15
    - configuration file path, setting 17
    - cookie domain information, specifying 31
    - cookie domain path, overriding 31
    - cookie domain, list of tasks 31
    - cookie, specifying expiration date 31
    - default language, specifying for login screen 35
    - fully qualified URLs, specifying generation of 35
    - log users off automatically, setting time 23
    - nonprimary resource files, specifying location 34
    - nonprimary resource files, specifying path 35
    - ODBC DSN, changing 17
    - open record sets, specifying maximum number 31
    - primary resource files, specifying location 33
    - primary resource files, specifying path 34
    - remember user's names and passwords, disabling 18
    - static URLs, specifying how generated 33
    - unattended request, setting time to cancel 23
    - unsaved request, setting time to keep 22
    - URLs, generating and resource file location 32
    - URLs, specifying how generated 32
  - configuration files, centrally managing values in** 15
  - configuration keys** 46
  - configuring Javahost service** 41
  - connection pool, write back** 90
  - cookie domain, configuring**
    - cookie domain information, specifying 31
    - cookie domain path, overriding 31
    - cookie, specifying expiration date 31
    - tasks, list of 31
  - copying**
    - and pasting content between catalogs 122
    - items 112
  - creating**
    - device types 72
    - reports to display Presentation Catalog data 129
  - cross-site scripting** 37
  - currency**
    - customized subject areas, specifying currency 55
    - default currency, changing in Answers 54
  - custom message template for proxy functionality** 170
  - customized subject areas, specifying currency** 55
  - custommessages.xml file, sample** 196
- D**
- Dashboard URL**
    - about and format 210

- basic Dashboard URL, about and format 211
  - PortalPath parameter, using 211
  - User ID and Password parameter, using 211
  - dashboards**
    - about managing 77
    - banner file (portalbanner.css), about 189
    - banner image, customizing example 190
    - catalog structure, setting up the 162
    - changing permissions for 78
    - changing properties of 78
    - community, releasing dashboards to 167
    - creating 78
    - deleting 78
    - managing 78
    - new dashboard style, creating 190
    - Presentation Services group, about creating 162
    - security, process of setting up 161
    - shared documents, setting up virtual directory 167
    - testing 167
  - dashboards, administering**
    - action links, creating 79
    - Answers, integrating into other portals or intranets 88
    - Briefing Book links, setting number 87
    - dashboard link text, changing 88
    - dashboard names, setting number to appear 81
    - dashboard, deleting 79
    - dashboards link, changing destination 89
    - results, downloading in non-UNICODE format 87
  - data warehouse, setting default currency** 54
  - database authentication overview** 143
  - deleting**
    - dashboard 79
    - device types 72
    - folder or item 112
    - Presentation Services group 141
    - user or group from an existing group 141
  - Delivers, administering**
    - antivirus software and blocking scripts 68
    - database authentication, about working with 143
    - device types 72
    - disabling Delivers 69
    - iBots and antivirus software, about 68
    - iBots deliveries, changing directory where stored 70
    - iBots log directory, viewing entries 68
    - iBots, about and impersonation 67
    - Oracle BI Scheduler, specifying machine running 70
    - Oracle's Siebel Workflow, integrating with 71
    - permission settings, about and for iBots 71
    - server cache, using to seed 71
    - viewing information about active iBot sessions 76
  - delivery devices** 74
  - delivery options for iBots** 74
  - delivery profiles** 74
  - deploying the Oracle BI ReportUI Portlet** 203
  - device types for Delivers** 72
  - directories, setting up virtual directory for shared documents** 167
  - disabling Delivers** 69
  - documents, setting up virtual directory for shared documents** 167
  - Download link, options for downloading results** 87
  - drill down, adding support for in Answers** 54
- ## E
- editing device types** 72
  - effective permissions and privileges, about** 145
  - Everyone group, about** 139
  - Everyone Users Presentation Services groups, about adding to Presentation Services groups** 147
  - Excel, removing download link** 198
  - explicit access, changing to a privilege** 153
  - explicitly set permissions, about configuring** 147
  - exporting Presentation Catalog text strings** 130
  - exposing Presentation Catalog text strings** 130
  - external table authentication, overview** 143
- ## F
- filters**
    - Go URL, passing to through URL, 212
  - Flash software**
    - default Flash download source, modifying 50
    - download prompt for new Flash versions, enabling 50
    - downloading and using as default image type, about 50
  - folder, b\_mozilla\_4** 65
  - folders**
    - /Shared folder, about 162
    - /User folder, about 162

- administering catalog 110
- archiving 109, 132
- Common folder, about 164
- deleting folders 112
- Group folders, about and permissions 163
- naming 112
- nesting in selection pane 55
- new Presentation Catalog folder,
  - creating 111
- new Presentation Catalog folder, viewing
  - contents 111
- Requests folder, about 164
- shared Presentation Catalog folders,
  - displaying 110
- shared Presentation Catalog folders, showing
  - hidden items 111
- unarchiving 132
- Full Control permission, about** 147
- Full proxy level** 168

**G**

**Go URL**

- about 207
- application-friendly format, displaying results
  - in 209
- basic Go URL, about and example 208
- filters, about passing to through URL 212
- HTML results, navigation from 216
- JavaScript, navigation using 215
- link options, format and example 208
- navigation example 214
- navigation from charts 214
- navigation parameters syntax 212
- printer friendly format and example 209
- result format, controlling 210
- specific style, showing results in 209
- specify view, showing 209
- SQL, using to issue and passing filters 212
- tables, displaying all records in 210
- user ID and password, prompting for 208
- GoNav JavaScript function, about** 215
- group folder, about and permissions** 163
- Group session variable, about** 144

**groups**

- differences between web groups 136
- existing Presentation Services group, deleting
  - from 141
- Presentation Services group, adding to
  - existing 141
- Presentation Services groups, about and
  - users 138
- privilege, assigning to 153
- GROUPs, setting Web content if no**

- content** 144
- guidelines for Catalog Manager** 116

## H

- hidden items, showing** 111
- HTML input** 37

## I

### iBots

- about and impersonation 67
- antivirus software, about 68
- deliveries, changing directory where
  - stored 70
- delivery options 74
- log directory, viewing entries 68
- permission settings, about and for
  - Delivers 71
- viewing information about active sessions 76

### image type

- chart image type, specifying 50
- default Flash download source, modifying 50
- download prompt for new Flash versions,
  - enabling 50
- Flash, about downloading and using as
  - default 50

- impersonation, about and iBots** 67

- inherited permissions, about**
- configuring** 147

- instanceconfig.xml** 15, 46

### integrating Oracle Business Intelligence

- Dashboard URL, using 210
- filters, passing to the Go command through a
  - URL 212
- Go URL, using 207
- SQL, issuing using the Go command 212
- third-party SQL tool, integrating
  - example 217

### intelligence agents

- See iBots

- internal authentication, about** 143

- intranets, integrating Answers into** 88
- items**

- adding permissions to 152
- changing permissions of 151
- copying or moving 112
- creating and using shared 166
- deleting 112
- ownership, taking 111
- renaming 112
- searching for 121
- showing hidden 111
- working with properties 123



**J****Javahost service**

- about 37
- command line options 38
- command line properties 41
- configuring 41
- logging 46
- starting 38
- stopping 38

**JavaScript, about using to customize the user interface 187****K****keys, configuration 46****L****language selection, adding to screens 197**  
**languages**

- default language, specifying for login screen 35
- multiple languages and messages, support of 194

**LDAP authentication overview 142****links**

- action links, creating 79
- Briefing Book links, setting number 87
- dashboard link, changing destination 89

**location of the Presentation Catalog 95****log file**

- iBot log directory, viewing entries 68
- messages in 183

**log off, setting time 23****logging for Javahost service 46****login screen, specifying default language 35****logon names, case of 74****logon pages, customizing 199****M****message template for proxy functionality 170****messages**

- customizing 193
- custommessages.xml file, sample 196
- in log files 183
- multiple languages, support of 194

**Microsoft**

- Access, example of integrating with Oracle Business Intelligence 217
- Excel file, removing download (Excel) link 198
- IIS Web Server, about temporary files 97

**modes for opening Presentation Catalogs in****Catalog Manager 116****moving a Presentation Catalog to another installation 98****moving items 112****N****names, case of logon 74****navigation**

- Answers, adding support for in 54
- Briefing Book links, setting number 87

**No Access permission, about 147****non-dashboard components, customizing**

- about and file 191
- custommessages.xml file, sample 196
- download (Excel) hyperlink, removing 198
- Oracle BI Presentation Services WebMessage name tags, resolution of 194
- user interface messages, frequently customized 198
- user interface, customizing using XML files 192
- XML message files, customizing 193
- XML message files, structure of 193
- XML message files, support of multiple languages 194
- XML template, sample 195

**nonprimary resource files**

- location, specifying 34
- path, specifying 35

**O****objects**

- committing to production 98
- previewing in Catalog Manager 126
- viewing and editing in XML 125

**ODBC DSN, changing 17****offline mode for opening Presentation Catalog 116****online mode for opening Presentation Catalogs 116****open record sets, specifying maximum number 31****opening Presentation Catalogs 116****options, delivery for iBots 74****Oracle 10 style sheet example 189****Oracle Application Server Portal 199****Oracle BI Answers**

- See Answers and Answers, administering

**Oracle BI Catalog Manager**

- See Catalog Manager

**Oracle BI Dashboards**

- See dashboards and dashboards, administering



**Oracle BI Delivers**

See Delivers, administering

**Oracle BI Presentation Catalog**

See Presentation Catalog and Presentation Catalog, administering

**Oracle BI Presentation Services Log** 183**Oracle BI Presentation Services privilege assignments, about and table** 154**Oracle BI Presentation Services Replication Agent** 103**Oracle BI Presentation Services styles and skins** 191**Oracle BI Presentation Services**

WebMessage name tags, resolution of 194

**Oracle BI ReportUI Portlet**

configuring 199

configuring authentication in 203

deploying 203

**Oracle BI Scheduler**

machine running, specifying 70

Windows file system, about accessing 68

**Oracle BI Server group, about automatically becoming Presentation Services group members** 140**Oracle's Siebel Workflow, integrating with Delivers** 71**P****pasting items between Presentation Catalogs** 122**permissions**

adding 152

Catalog Manager, setting through 124

Change/Delete 147

changing 151

Everyone Presentation Services groups, about adding 147

Full Control 147

inheritance rules, about and list of 145

inheritance, about assigning 145

No Access 147

Presentation Services groups, setting for 144

privileges, about setting and example 152

Read 147

recommendations for setting 148

removing permissions, about 148

setting for items 124

setting, about 147

settings, for Delivers and iBot 71

Traverse Folder 147

types of 147

**pivot table settings, configuring**

about 52

populated cells, specifying maximum number 53

records, specifying maximum number to process 53

**PopChart Image Server**

chart image type, specifying 50

charts, about using to render 49

**PortalBanner.css**

dashboard banner image, customizing example 190

**portalbanner.css**

about 189

**portalcontent.css file** 189**PortalNav JavaScript function, about** 215**portals, integrating Answers into** 88**precedence order for time zones** 26**Presentation Catalog**

about 95

about upgrading to a newer version 132

adding permissions to items 152

archiving 109, 132

catalog items, setting permissions to 164

Catalog Manager, setting permissions through 124

catalog structure, recommended folder structure (diagram) 162

catalog structure, setting up the 162

changing permissions of items 151

Common folder, about 164

configuring for more than 4000 users 97

copying and pasting items between 122

creating 97

creating reports to display data 129

dashboards, releasing to the community 167

dashboards, testing 167

exporting text strings for 130

exposing text strings for 130

Group folder, about and permissions 163

localizing captions for 129

location of 95

managing the cache 97

modes for opening in Catalog Manager 116

moving to another installation 98

opening 116

Presentation Services group, about creating 162

replicating 99

Requests folder, about and permissions 164

searching for and replacing text 127

security, process of setting up 161

shared dashboards, adding pages and content 165

- shared dashboards, creating 164
  - shared documents, setting up virtual directory 167
  - unarchiving 132
  - viewing and editing objects in XML 125
  - Presentation Catalog, administering**
    - Catalog Manager workspace, about 119
    - Catalog Manager, about 115
    - Catalog Manager, starting 116
    - copying and pasting items between Presentation Catalogs 122
    - folder or item, deleting 112
    - folder or item, renaming 112
    - item, copying or moving 112
    - item, taking ownership 111
    - name and location, changing 96
    - new folder, creating 111
    - new folder, viewing contents 111
    - new Presentation Catalog, creating 97
    - recommendations for working with 116
    - rename items, about using Catalog Manager to 123
    - setting permissions of items 124
    - shared Presentation Catalog folders, displaying 110
    - shared Presentation Catalog folders, showing hidden items 111
    - working with properties 123
  - Presentation Services Administrators group** 139
  - Presentation Services groups**
    - about and users 138
    - administrator-defined Presentation Services groups, about 139
    - differences between groups 136
    - Everyone Presentation Services groups, about adding 147
    - inheritance rules, about and list of 145
    - inheritance, about assigning 145
    - note, Oracle BI Server group, about automatically becoming members 140
    - Oracle BI Presentation Services default privilege assignments (table) 154
    - permissions and privileges, setting 144
    - Presentation Services group, creating 140
    - Presentation Services group, deleting 141
    - privileges, inheritance example and diagram 146
    - read permissions, about 140
    - session variable block, about 143
    - shared Presentation Catalog group folder, about creating 162
    - system-defined Presentation Services groups, list of 139
    - user or group, adding to an existing group 141
    - user or group, deleting 141
    - WEBGROUPS session variable, about 144
  - previewing objects from Catalog Manager** 126
  - primary resource files**
    - location, specifying 33
    - path, specifying 34
  - privileges**
    - about setting and example 152
    - Everyone Presentation Services groups, about adding 147
    - explicit access, changing 153
    - inheritance rules, about and list of 145
    - inheritance, about assigning 145
    - Oracle BI Presentation Services default privilege assignments, about and table 154
    - Presentation Services groups, inheritance example and diagram 146
    - Presentation Services groups, setting for 144
    - proxy 173
    - user or group, assigning a privilege to 153
    - user rights and privilege assignment table example 137
    - write back 91
  - production, committing an object to properties** 98
    - command line for Javahost service 41
    - working with in Catalog Manager 123
  - proxy functionality**
    - about 167
    - assigning the proxy privilege 173
    - creating a custom message template 170
    - defining proxy users and target users association 168
    - modifying instanceconfig.xml for 170
    - session variables for 169
    - setting up 168
  - proxy levels** 167
  - proxy privilege** 173
  - proxy users** 167
  - Publish iBots for Subscription privilege, about granting access to** 71
- Q**
- query file, viewing for request information** 22

**R****Read permission, about** 147**renaming items**

- about 123
- with reference updates 123
- without reference updates 123

**replacing Presentation Catalog text** 127**replication**

- of Presentation Catalogs 99
- Oracle BI Presentation Services Replication Agent 103
- resuming 102
- sawrepaj utility 103

**Replication Agent** 103**requests**

- cache entry, clearing associated with a request 22
- logged on users and running requests, viewing information 19
- query file, viewing for request information 22
- running requests, canceling all requests 21
- running requests, canceling one request 21
- sharing requests for users within a group, about 148
- unattended requests, setting time to cancel 23
- unsaved requests, setting time to keep 22

**Requests folder, about** 164**resource files**

- fully qualified URLs, specifying generation of 35
- location, about managing and URL generation 32
- nonprimary resource files, specifying location 34
- nonprimary resource files, specifying path 35
- primary resource files, specifying location 33
- primary resource files, specifying path 34

**Restricted proxy level** 168**results, non-UNICODE format, downloading in** 87**resuming replication** 102**S****SA System subject area** 73, 74**sawrepaj utility** 103**screens, adding a language selection to searching for** 197

- and replacing Presentation Catalog text 127
- Presentation Catalog items 121

**security**

access control and permissions, about and format 137

authentication process described 142

catalog and dashboards, guidelines for configuring 161

database authentication, about 143

external table authentication, about 143

goals, list of 136

internal authentication, about 143

LDAP authentication, about 142

permissions and privileges, inheritance of 145

permissions, about setting 147

Presentation Services group, creating 140

Presentation Services groups, about and users 138

settings, where they are located 136

user authentication, about 138

user rights and privileges 137

**server cache, seeding using Delivers** 71**session variables**

- for proxy functionality 169
- for time zones 28
- Group session variable, about 144
- permissions and privileges, setting 144
- WEBGROUPS session variable, about 144

**sessions, administering**

- cache entry, clearing associated with a request 22
- logged on users and running requests, viewing information 19
- query file, viewing for request information 22
- running requests, canceling all requests 21
- running requests, canceling one request 21
- viewing information about active iBot 76
- Web cache, clearing 21

**settings for time zones** 28**shared dashboards**

- community, releasing dashboards to 167
- deleting 79
- shared document, setting up virtual directory 167
- testing 167

**/Shared folder, about** 162**shared items, creating and using** 166**skins**

- defaults, about specifying 191
- Oracle BI Presentation Services skins folder, specifying which to use 191

**specifications for time zones** 27**SQL**

- example of integrating third-party tool 217
- using Go command to issue SQL and passing

- filters 212
- starting**
  - Catalog Manager
  - Javahost service 38
- stopping Javahost service** 38
- style sheets**
  - cascading style sheets, for more information on 190
  - dashboard banner image, customizing example 190
  - dashboard user interface, files that affect 189
  - location of 188
  - new dashboard style, creating 190
- subject area**
  - SA System 73, 74
- system session variables**
  - Group session variable, about 144
  - permissions and privileges, setting 144
  - session variable block, about 143
  - WEBGROUPS session variable, about 144
- system-defined Presentation Services groups, list of** 139

## T

- table view, configuring maximum number of rows** 53
- templates**
  - custom message for proxy functionality 170
  - write back 91, 92
  - write back example 93
  - XML template sample 195
- text strings**
  - exporting for Presentation Catalog 130
  - exposing for Presentation Catalog 130
  - localizing for Presentation Catalog 129, 130
- third-party SQL tool, integrating example** 217
- time to expire**
  - client connections, setting for 18
  - client sessions, setting for 22
- time zones**
  - and session variables 28
  - precedence order 26
  - setting for users 24
  - settings 28
  - specifications 27
  - specifying values 27
  - usage 25
  - user-preferred 27
- Traverse Folder permission, about** 147

## U

- unarchiving**
  - catalog folders 132
  - objects 98
  - Presentation Catalog 132
- unattended request, setting time to cancel** 23
- UNICODE, downloading results in non-UNICODE format** 87
- unsaved requests, setting time to keep** 22
- upgrading to a newer version of Presentation Catalog** 132
- URLs**
  - fully qualified URLs, specifying generation of 35
  - generated, specifying how 32
  - generation and resource file location, about 32
  - static URLs, specifying how generated 33
- User folder, about** 162
- User Interface Language, about setting** 35
- user interface, customizing**
  - cascading style sheets, for more information on 190
  - cascading style sheets, working with 189
  - custommessages.xml file, sample 196
  - dashboard banner image, customizing example 190
  - default images and style sheets, location of 188
  - download (Excel) hyperlink, removing 198
  - logon pages, customizing 199
  - new dashboard style, creating 190
  - non-dashboard components, customizing 191
  - Oracle BI Presentation Services skins folder, specifying which to use 191
  - Oracle BI Presentation Services style folder, specifying which to use 191
  - Oracle BI Presentation Services styles and skins, specifying defaults 191
  - Oracle BI Presentation Services WebMessage name tags, resolution of 194
  - user interface messages, frequently customized 198
  - XML message files, about using to customize 192
  - XML message files, customizing 193
  - XML message files, structure of 193
  - XML message files, support of multiple languages 194
  - XML template, sample 195
- user-initiated administration actions** 173

**user-preferred time zone** 27

## **users**

- acting for others 167
- existing Presentation Services group, deleting from 141
- log users off automatically, setting time 23
- logged on users and running requests, viewing information 19
- names and passwords, disabling remembering 18
- Presentation Services group, adding to 141
- privilege, assigning to 153
- setting the preferred times zones for 24
- Web cache, clearing 21

**utility, sawrepaj** 103

## **V**

**view.css file** 189

**viewing device types** 72

**virtual directory, setting up for shared documents** 167

**virtual path, overriding** 34

## **W**

**Web cache, clearing** 21

**WEBGROUPS session variable**

- about 144

- permissions and privileges, setting 144

**WebMessage name tags, resolution of** 194

**WebSphere Portal** 199

**working with Catalog Manager** 116

**workspace for Catalog Manager** 119

**workspace view for Catalog Manager** 120

## **write back**

- connection pool 90
- limitations 93
- privileges 91
- table 90
- template 91, 92
- template example 93

## **X**

### **XML message files**

- custommessages.xml file, sample 196
- message files, structure of 193
- messages, customizing 193
- multiple languages, support of 194
- Oracle BI Presentation Services WebMessage name tags, resolution of 194
- user interface, about using to customize 192
- XML template, sample 195

**XML template, sample** 195

**XSS (cross-site scripting)** 37

