

Oracle® Business Intelligence Applications

Installation Guide

11g Release 1 (11.1.1.8.1)

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Provides the steps to install and set up Oracle Business Intelligence Applications.

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Preface

Oracle Business Intelligence Applications is a comprehensive suite of prebuilt solutions that delivers pervasive intelligence across an organization, empowering users at all levels - from front line operational users to senior management - with the key information they need to maximize effectiveness. Intuitive and role-based, these solutions transform and integrate data from a range of enterprise sources and corporate data warehouses into actionable insight that enables more effective actions, decisions, and processes.

Oracle BI Applications is built on Oracle Business Intelligence Suite Enterprise Edition (Oracle BI EE), a comprehensive set of enterprise business intelligence tools and infrastructure, including a scalable and efficient query and analysis server, an ad-hoc query and analysis tool, interactive dashboards, proactive intelligence and alerts, and an enterprise reporting engine.

Audience

This document is intended for managers and implementers of Oracle BI Applications.

Documentation Accessibility

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Related Documents

See the Oracle Business Intelligence Applications documentation library at http://docs.oracle.com/cd/E51479_01/index.htm for a list of related Oracle Business Intelligence Applications documents: .

Conventions

The following text conventions are used in this document:

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

New Features for Oracle BI Applications Installation

This chapter describes changes to installation features in Oracle BI Applications 11g Release 1 (11.1.1.8.1).

New Features for Oracle BI Applications 11g Release 1 (11.1.1.8.1)

There are no new Oracle BI Applications installation features in this release. This revision of the guide includes instructions on how to set up Oracle BI Applications with a non-Oracle source database for the Oracle Data Integrator (ODI) repository.

Oracle BI Applications Architecture and Installation Overview

This chapter provides an overview of the Oracle Business Intelligence Applications architecture and installation process.

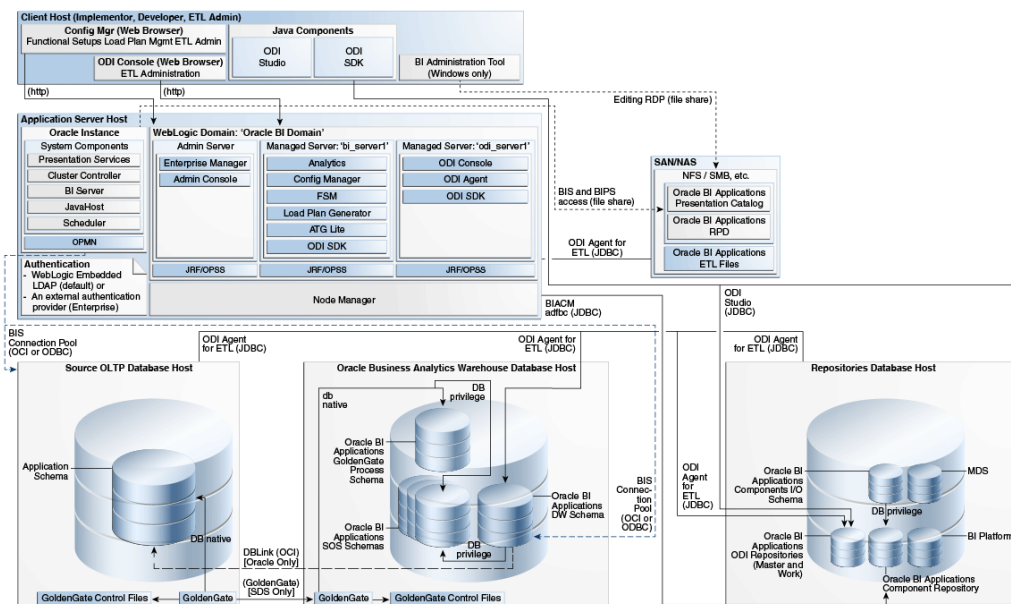
This chapter contains the following topics:

- Section 1.1, "Oracle BI Applications Architecture"
- Section 1.2, "Oracle BI Applications Installation Roadmap"

1.1 Oracle BI Applications Architecture

Figure 1-1 shows the Oracle BI Applications deployment architecture.

Figure 1-1 Oracle BI Applications Deployment Architecture



Components Deployed Into Manager Server "bi_server1"

- **Oracle BI Applications Configuration Manager** - This component is a Web application that enables you to perform system setups, functionally configure your BI Applications, and define, generate, run, and monitor load plans.

- **Functional Setup Manager** - (Depicted as FSM in [Figure 1–1](#)) This component is a Web application used by Configuration Manager for sequenced task implementation and task dependency management.
- **Load Plan Generator** - This component is a set of jar files used to create load plans in the Oracle Data Integrator Repository.
- **ATGLite** - This component is a J2EE component used by Oracle BI Applications Configuration Manager and Functional Setup Manager.

Components Deployed Into Managed Server "odi_server1"

- **ODI Console** - This component enables you to control and monitor ETL.
- **ODI Agent** - This component is a Java EE Agent, which handles schedules and orchestrates sessions.

Oracle BI Applications Repositories

- **Business Analytics Warehouse** - The Business Analytics Warehouse is a unified data repository for all customer-centric data, which supports the analytical requirements of the supported source systems. The Business Analytics Warehouse is supported only on Oracle Database.
- **Business Intelligence Applications Components Repository (BIACOMP)** - This is the repository for Configuration Manager and Functional Setup Manager. It contains load plan definitions as well as BI Applications product hierarchy, setup objects, such as parameters and domain mappings, and a list of functional tasks. This repository is supported only on Oracle Database.
- **Business Intelligence Applications I/O Schema** - This schema is a mirror schema and is used by all other components to read the BIACOMP schema. It supports read/write of configuration and functional setup data through ETL processes.
- **Oracle Data Integrator Repository for BI Applications** - This repository contains the BI Applications-specific prebuilt ETL logic.

Client Tier

As depicted in [Figure 1–1](#), the client host machine shows the Configuration Manager and Oracle Data Integrator Console accessed through Web browsers. ODI Studio is installed on a developer client machine. For BI Applications usage, ODI SDK must be installed along with ODI Studio.

Additional Tools

Golden Gate is an optional tool integrated with Oracle BI Applications. It enables you to optimize ETL loads and reduce impact on the source system, using a source-dependent data store.

For information about deploying Golden Gate in an Oracle BI Applications environment, see *Oracle Business Intelligence Applications Administrator's Guide*.

ETL Architecture

For information about ETL architecture, see the section titled 'ETL Overview' in *Oracle Business Intelligence Applications ETL Guide*.

1.2 Oracle BI Applications Installation Roadmap

The process of installing and configuring Oracle BI Applications includes the following high-level steps:

1. Review the *System Requirements and Supported Platforms* on Oracle Technology Network at <http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html>.
2. Review preinstallation and deployment requirements.
3. Install prerequisites:
 - Oracle Business Intelligence Enterprise Edition:
 - Software Only Install mode requires WebLogic Server 10.3.6 as a prerequisite.
 - Enterprise Install mode installs WebLogic Server 10.3.5. You must upgrade to WebLogic Server 10.3.6 after installation of Oracle BI Applications is complete.
 - Oracle Data Integrator.
4. Create schemas for Oracle BI Applications

In this step you run the Business Analytics Applications Suite Repository Creation Utility (RCU) to create the necessary schemas for Oracle BI Applications.
5. Install Oracle BI Applications.

In this step you run the Business Analytics Applications Suite installer to install the binary files for Oracle BI Applications.
6. Apply Fusion Middleware Platform Patches.
7. Configure BI Applications.

This step is the configuration phase of the installation process. In this step you configure Oracle Business Intelligence Applications with the configuration script.
8. Apply post-installation patches.
9. Perform system setup tasks.

You perform system setups to complete integration of the Oracle BI Applications components and to ready the system for functional configurations and data loads.
10. Configure non-Oracle source databases.

This step is required only if your source database is not Oracle Database.
11. If you are deploying Cloud Adaptor, then follow the steps in [Section 4.12, "Setting Up Fusion Applications Cloud Data Sources"](#).
12. If you are deploying Key Flex Fields for Financials, then before you execute this Load Plan you must follow the steps in [Chapter 5, "Setting Up Key Flex Fields for Financials Cloud Adaptor"](#).

Preinstallation and Deployment Requirements for Oracle BI Applications

This chapter describes the preinstallation and deployment requirements for Oracle BI Applications.

This section contains the following topics:

- [Section 2.1, "General Guidelines for Setting Up Databases for Oracle BI Applications"](#)
- [Section 2.2, "Oracle-Specific Database Guidelines for Oracle Business Analytics Warehouse"](#)

2.1 General Guidelines for Setting Up Databases for Oracle BI Applications

This section contains the following topics:

- [Section 2.1.1, "Guidelines for Oracle Business Analytics Warehouse Databases"](#)
- [Section 2.1.2, "Why Use a Separate Database for the Oracle Business Analytics Warehouse?"](#)

2.1.1 Guidelines for Oracle Business Analytics Warehouse Databases

The following guidelines will help you set up the data warehouse physical database for performance and growth:

- Allocate around 50 to 70 percent of the total available server memory to the database, assuming no other application is running on the same server.
- At a minimum, separate the data and index tablespaces. Create more tablespaces to separate heavily used tables and their indexes.
- Oracle recommends using 8k block size for Oracle warehouses. For more information about block size and Oracle databases, see the Oracle Database 11g Documentation Library on Oracle Technology Network.
- If you are using multiple disk storage systems, stripe the tablespace containers and files across as many disks as possible.
- Raw devices for tablespaces provide better performance as compared to cooked file systems.
- RAID-5 is known to give a good balance of performance and availability.

2.1.2 Why Use a Separate Database for the Oracle Business Analytics Warehouse?

Although it is technically possible to put the Oracle Business Analytics Warehouse in the same database as the transactional database, it is not recommended for performance reasons. The transactional database is structured as an online transaction processing (OLTP) database, whereas the Oracle Business Analytics Warehouse is structured as an online analytical processing (OLAP) database, each optimized for its own purpose. The reasons for not combining the two databases are the following:

- ETL is configured to maximize hardware resources; and, therefore, the warehouse should not share any resources with any other projects.
- The analytical queries interfere with normal use of the transactional database, which is entering and managing individual transactions.
- The data in a transactional database is normalized for update efficiency. Transactional queries join several normalized tables and will be slow (as opposed to pre-joined, de-normalized analytical tables).
- Historical data cannot be purged from a transactional database, even if not required for current transaction processing, because you need it for analysis. (By contrast, the analytical database is the warehouse for historical as well as current data.) This causes the transactional database to further slow down.
- Transactional databases are tuned for one specific application, and it is not productive to use these separate transactional databases for analytical queries that usually span more than one functional application.
- The analytical database can be specifically tuned for the analytical queries and Extract-Transform-Load (ETL) processing. These are quite different from transactional database requirements.

2.2 Oracle-Specific Database Guidelines for Oracle Business Analytics Warehouse

This section contains guidelines that are specific to Oracle databases, and contains the following topics:

- [Section 2.2.1, "General Guidelines for Oracle Databases"](#)
- [Section 2.2.2, "Using Oracle Template Files"](#)

2.2.1 General Guidelines for Oracle Databases

This section contains additional suggestions for optimizing performance for Oracle databases.

- Oracle BI Applications on Oracle databases support only binary sorting. If you are running an Oracle client, do one of the following:
 - Set the NLS_SORT parameter to BINARY.
 - Choose a NLS_LANG setting that includes binary.

These settings are required for adequate performance from the dedicated Web client.

- It is recommended that you gather workload system statistics.
- To increase data throughput between Oracle BI Server and the Oracle database, change SDU and TDU settings in listener.ora. The default is 2 KB and can be increased to 8 KB.

- On the server side, edit the listener.ora file. Under the particular SID_LIST entry, modify SID_DESC as follows:

```
SID_LIST_LISTENER =
  SID_LIST =
    SID_DESC = (SDU=16384) (TDU=16384)
              ORACLE_HOME = /.....)
              SID_NAME = SOLAP)
  )
)
```

- Set the number of log file groups to 4.
- On the client side, edit the tnsnames.ora file. Modify the TNS alias by adding SDU= and TDU= as follows:

```
myhost_orcl.world=
  DESCRIPTION=(SDU=16384) (TDU=16384)
  ADDRESS = (PROTOCOL = TCP) (HOST=myhost) (PORT=1521)
  CONNECT_DATA=(SID=ORCL)
```

2.2.2 Using Oracle Template Files

To configure the Business Analytics Data Warehouse on Oracle databases more easily, refer to the parameter template file `init11gR2_template.ora` file or `init11gR2_Exadata_template.ora`, which are stored in `\<BI_Oracle_Home>\biapps\etl`.

The parameter template file provides parameter guidelines based on the cost-based optimizer for Oracle 11gR2. Use these guidelines as a starting point. You will need to make changes based on your specific database sizes, data shape, server size (CPU and memory), and type of storage. The database administrator should make changes to the settings based on performance monitoring and tuning.

Copy the appropriate template file into your `<ORACLE_HOME>/dbs` directory. Then, review the recommendations in the template file, and make the changes based on your specific database configuration. The database administrator should make changes to the settings based on performance monitoring and tuning considerations.

Note: The `NLS_LENGTH_SEMANTICS` parameter enables you to define byte- or character-length semantics. Oracle BI Applications supports `BYTE` and `CHAR` values for this parameter. If you are using `MLS` characters, then you can add this parameter to the parameter template file for your database version (that is, the `init<DB version>.ora` file).

Installing and Setting Up Oracle BI Applications

This chapter provides instructions for installing and setting up Oracle BI Applications.

This chapter contains the following main topics:

- Section 3.1, "Hardware Requirements"
- Section 3.2, "Installing Prerequisites for Oracle BI Applications"
- Section 3.3, "Installing and Configuring Oracle BI Applications"

3.1 Hardware Requirements

The hardware requirements for Oracle BI Applications are as follows:

- 10-12 GB of free memory and 10 GB Swap Space for run-time requirements.
- 35 GB free disk space and 10 GB Swap Space to run the Business Analytics Applications Suite installer. This disk space will be released after the installer finishes.

For additional information about hardware requirements for Oracle BI EE and Oracle Data Integrator, go to the Oracle Fusion Middleware Supported System Configurations page at

<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html> and see *System Requirements and Supported Platforms*.

3.2 Installing Prerequisites for Oracle BI Applications

This section provides information about the components you must install before you install Oracle BI Applications.

Note: For the specific versions of the prerequisite products supported for this release of Oracle BI Applications, go to the Oracle Fusion Middleware Supported System Configurations page at <http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html> and see *System Requirements and Supported Platforms*.

Note: When you run the Oracle Business Intelligence 11g installer, you can select either the Software Only Install or Enterprise Install option. If you select the Software Only Install option, then you must install WebLogic Server 10.3.6 before running the Oracle BI EE installer. If you select the Enterprise Install option, WebLogic Server 10.3.5 is automatically installed. You must then upgrade to WebLogic Server 10.3.6 after installing Oracle Business Intelligence Enterprise Edition.

This section contains the following topics:

- Section 3.2.1, "Installing JDK or JRockit"
- Section 3.2.2, "Installing Oracle WebLogic Server"
- Section 3.2.3, "Running Fusion Middleware RCU"
- Section 3.2.4, "Installing Oracle Business Intelligence Enterprise Edition 11g"
- Section 3.2.5, "Configuring Oracle Business Intelligence"
- Section 3.2.6, "Upgrading to WebLogic Server 10.3.6"
- Section 3.2.7, "Installing Oracle Data Integrator"

3.2.1 Installing JDK or JRockit

The Business Analytics Applications Suite installer, which you run to install Oracle BI Applications, requires JDK version 1.6.0_35 or higher or JRockit version 6u37 R28.2.5 or higher.

Oracle BI EE, WebLogic Server, and Oracle Data Integrator also require JDK and JRockit. For the supported versions, go to the Oracle Fusion Middleware Supported System Configurations page at

<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html> and see *System Requirements and Supported Platforms*. Make sure the version of JDK or JRockit you install meets the requirements for all products.

Note: You must use the 64-bit version of JDK or JRockit to install on 64-bit machines. On Windows, the location of the JDK must be on the same drive as the installers.

3.2.2 Installing Oracle WebLogic Server

Oracle BI Applications requires WebLogic Server 11g Release 1 (10.3.6).

If you choose to install Oracle Business Intelligence Enterprise Edition (Oracle BI EE) using the Software Only Install option, then you must install WebLogic Server 10.3.6 by following the instructions in *Oracle Fusion Middleware Installation Guide for Oracle WebLogic Server 11g Release 1 (10.3.6)*.

If you choose to install Oracle BI EE using the Enterprise Install option, then you do not have to perform this step, because WebLogic Server 10.3.5 is automatically installed. However, you must upgrade to WebLogic Server 10.3.6 after the Oracle BI Applications installation is complete. For instructions on upgrading WebLogic Server, see *Oracle Fusion Middleware Upgrade Guide for Oracle WebLogic Server 11g Release 1 (10.3.6)*.

3.2.3 Running Fusion Middleware RCU

Before installing Oracle Business Intelligence Enterprise Edition, you must run the Fusion Middleware Repository Creation Utility (RCU) to create the necessary schemas. In the Select Components screen of the RCU, make sure you select the options to install the following schemas:

- **Metadata Services** (appears under AS Common Schemas)

Make a note of the Metadata Services schema owner name and password. You will need these values when you run the configApps.bat or configApps.sh file to set up Oracle BI Applications.

- **Business Intelligence Platform** (appears under Oracle Business Intelligence)

Caution: Do not select the option to install the Oracle Data Integrator schema. You will install an Oracle BI Applications-specific ODI schema when you run the Business Analytics Applications Suite RCU.

For instructions on running the Fusion Middleware RCU, see *Oracle Business Intelligence Suite Enterprise Edition Installation and Upgrade Guide*.

3.2.4 Installing Oracle Business Intelligence Enterprise Edition 11g

Oracle BI Applications requires an installation of Oracle Business Intelligence Enterprise Edition 11g deployed on WebLogic Server 10.3.6. WebLogic Server 10.3.5 is not supported.

When you run the Oracle Business Intelligence 11g installer, you can select either the Software Only Install or Enterprise Install option. If you select the Software Only Install option, then you must install WebLogic Server 10.3.6 before running the Oracle BI EE installer. If you select the Enterprise Install option, WebLogic Server 10.3.5 is automatically installed. You must then upgrade to WebLogic Server 10.3.6 after the Oracle BI Applications installation is complete.

For instructions on installing WebLogic Server, see *Oracle Fusion Middleware Installation Guide for Oracle WebLogic Server*.

For instructions on installing Oracle BI EE, see *Oracle Business Intelligence Suite Enterprise Edition Installation and Upgrade Guide*.

Note the following points:

- Oracle BI EE must be deployed on WebLogic. Websphere is not supported for Oracle BI Applications.
- The BI Domain should not be extended or scaled out before running the Business Analytics Applications Suite installer.
- Installing Oracle BI EE using the Simple Install mode is not supported.
- Installing Oracle BI EE on Windows 32-bit and Linux 32-bit is not supported for Oracle BI Applications.
- If you are installing Oracle BI EE in Enterprise Install mode, on the Configure Components screen, for Oracle BI Applications 11.1.1.8.1, you must select the following four options:
 - **Business Intelligence Enterprise Edition.**
 - **Business Intelligence Publisher.**

- **Real-Time Decisions.**
- **Essbase Suite.**

3.2.5 Configuring Oracle Business Intelligence

You configure the BI Domain by running the config.bat or config.sh file. You need to perform this procedure if you installed Oracle BI EE in Software Only Install mode.

Note: If you installed Oracle BI EE in Enterprise Install mode, you do not have to perform this procedure. The BI Domain was configured as part of [Section 3.2.4, "Installing Oracle Business Intelligence Enterprise Edition 11g."](#)

The config.bat and config.sh files are located in <BI_Oracle_Home>/bin.

When running the config.bat file (or config.sh on Linux/UNIX), do the following:

- On the Create or Scale Out BI System screen, select **Create New BI System**.
For information about the options in this screen, see Section A.4, 'Create, Scale Out, or Extend BI System' in Oracle Business Intelligence Suite Enterprise Edition Installation and Upgrade Guide.
- On the Configure Components screen, for Oracle BI Applications release 11.1.1.8.1, you must select the following four options:
 - **Business Intelligence Enterprise Edition.**
 - **Business Intelligence Publisher** (will be automatically selected).
 - **Real-Time Decisions.**
 - **Essbase Suite.**

Note: Do not scale out the BI Domain.

3.2.6 Upgrading to WebLogic Server 10.3.6

Oracle BI Applications requires WebLogic Server 10.3.6. If you installed Oracle BI EE in Enterprise Install mode, then WebLogic Server 10.3.5 was automatically installed. You must now upgrade to WebLogic Server 10.3.6. The WebLogic Upgrade Installer allows you to upgrade to WebLogic Server 10.3.6. The Upgrade Installer is available on My Oracle Support (<https://support.oracle.com>). For instructions on downloading the Upgrade Installer and upgrading to WebLogic 10.3.6, see *Oracle Fusion Middleware Getting Started With Installation for Oracle WebLogic Server 11g Release 1 (10.3.6)*, and locate the section titled "Upgrade Installer," under the section "Obtaining the Installation Program."

3.2.7 Installing Oracle Data Integrator

Oracle BI Applications requires an installation of Oracle Data Integrator 11g. For the specific version of Oracle Data Integrator that is supported for this release of Oracle BI Applications, go to the Oracle Fusion Middleware Supported System Configurations page at

<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html> and see *System Requirements and Supported Platforms*.

For detailed information on installing Oracle Data Integrator, see *Oracle Fusion Middleware Installation Guide for Oracle Data Integrator*.

Note the following points:

- On the Oracle Data Integrator installer Welcome screen, ignore the message regarding creation of the Oracle Data Integrator Repository. You will create the Oracle Data Integrator Repository for Oracle BI Applications later when you run the Business Analytics Applications Suite RCU.
- On the Select Installation Type screen, select all the components under Java EE Installation, that is, **Java EE Agent**, **ODI Console**, and **Public Web Service**.
- On the Select Installation Type screen, if you also choose to install ODI Studio, then you must also select the **ODI SDK** option.
- On the Specify Installation Locations screen, enter the Middleware Home where Oracle BI EE is installed. **Note:** The installation of Oracle Data Integrator in other locations is not supported for BI Applications.
- If you chose to install ODI Studio, then on the Repository Configuration screen, you must select the **Skip Repository Configuration** option.

The Oracle Data Integrator installer is a generic installer. To launch the installer, use one of the following commands:

Platform	Command
Windows	<pre>setup.exe -jreLoc <location of jdk or jrockit></pre> <p>For example:</p> <pre>setup.exe -jreLoc C:\jdk</pre> <p>Note: For information about the JDK or JRockit requirements, see Section 3.2.1, "Installing JDK or JRockit."</p>
UNIX and Linux	<pre>./runInstaller -jreLoc <location of jdk or jrockit></pre>

3.3 Installing and Configuring Oracle BI Applications

This section provides instructions for installing and configuring Oracle BI Applications.

You must perform the following procedures in the order as they appear:

- [Section 3.3.1, "Creating Database Instances for Schemas and Repositories"](#)
- [Section 3.3.2, "Creating Schemas Using Business Analytics Applications Suite RCU"](#)
- [Section 3.3.3, "Installing Oracle BI Applications Using the Business Analytics Applications Suite Installer"](#)
- [Section 3.3.4, "Applying Platform Patches"](#)
- [Section 3.3.5, "Updating ATGLite"](#)
- [Section 3.3.6, "Updating FSM"](#)
- [Section 3.3.7, "Configuring Oracle BI Applications"](#)
- [Section 3.3.8, "How to Start the BI and Oracle Data Integrator Managed Servers"](#)
- [Section 3.3.9, "Installing ODI Studio"](#)
- [Section 3.3.10, "Applying the ODI Studio Patch"](#)
- [Section 3.3.11, "Copying Source Files"](#)

- [Section 3.3.12, "Next Steps"](#)

3.3.1 Creating Database Instances for Schemas and Repositories

Before you run the Business Analytics Applications Suite RCU and installer, you must create database instances to hold the following:

- Business Analytics Warehouse schema.
- Oracle BI Applications Components Repository (for Configuration Manager and Functional Setup Manager).
- Oracle Data Integrator Repository for Oracle BI Applications (includes Master and Work repositories).

Note the following points:

- For this release of Oracle BI Applications, the following components are supported only on Oracle Database Enterprise Edition:
 - Business Analytics Warehouse
 - BI Applications Components Repository.
 - Oracle Data Integrator Repository for BI Applications
- For the specific version of Oracle Database Enterprise Edition supported for this release of Oracle BI Applications, go to the Oracle Fusion Middleware Supported System Configurations page at <http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html> and see *System Requirements and Supported Platforms*.
- The Oracle Database Enterprise Edition must be configured with UNICODE.
- The Business Analytics Warehouse, BI Applications Components Repository, and Oracle Data Integrator Repository can be installed on different database servers.
- The Oracle Data Integrator Master and Work repositories are installed into the same schema.
- Review [Section 2.1.1, "Guidelines for Oracle Business Analytics Warehouse Databases,"](#) for information about database requirements for the Business Analytics Warehouse.

3.3.2 Creating Schemas Using Business Analytics Applications Suite RCU

You need to run the Business Analytics Applications Suite RCU to create schemas for the following components:

- Oracle Business Analytics Warehouse
- Oracle Business Applications Components
- Oracle Data Integrator Repository for Oracle BI Applications

Before you run the Business Analytics Applications Suite RCU, note the following points:

- On Windows machines, make sure that you unzip the downloaded RCU .zip file into a directory that does not have spaces in the directory path.
- The RCU uses .dmp files to create the required schemas. You must copy the .dmp files for each schema to a directory with global write access on the appropriate database server machines. (RCU writes log files to this directory.) The .dmp files are located in BIA_RCU_HOME/rcu/integration/biapps/schema.

- To create schemas with RCU on Oracle databases, you must possess the DBA privilege and be logged in as `SYSDBA` (for example, as user `SYS`, with the `SYSDBA` role selected).
- If you are creating schemas on different databases, then you will need to run RCU multiple times, once for each database connections, because the database connections are different for the different database servers.

To create the Oracle BI Applications schemas using the Business Analytics Applications Suite RCU:

1. Access the `bin` directory in the `BIA_RCU_HOME`.
2. Start RCU, as follows:
 - UNIX:


```
./rcu
```
 - Windows:


```
rcu.bat
```
3. On the Welcome screen, click **Next**.
4. On the Create Repository screen, select **Create**, and then click **Next**.
5. On the Database Connection Details screen, specify the connection details for the database in which you want to store the schemas. Note that you must possess the DBA privilege and be logged in as `SYSDBA` (for example, as user `SYS`).

Specify the following database connection details:

Field Name	Action
Database Type	Select Oracle Database . Other database types are not supported in this release.
Host Name	Specify the fully qualified host name of the machine hosting the database. For example, <code>machine12345.example.com</code>
Port	Specify the port number over which the database communicates. The default port number for an Oracle database is 1521.
Service Name	Specify the service name for the database. Typically, the service name is the same as the global database name.
Username	Specify the user name for the database. The default user name is <code>SYS</code> . The user must have DBA or <code>SYSDBA</code> privileges.
Password	Specify the password for the username specified in the Username field.
Role	Select <code>SYSDBA</code> .

6. Click **Next** to display the Select Components screen.
7. On the Select Components screen, near the top of the dialog, select **Create a new Prefix**.

The default prefix is `DEV`. You can change the prefix.

RCU automatically creates the schema owner (schema name) in the format `prefix_schemaname`.

Select the following options:

Schema Option	Default Schema Owner
Oracle Business Analytics Warehouse	<prefix>_DW (required for all deployments).
Oracle Business Applications Components	<prefix>_BIACOMP (required for all deployments). When you select the BI Applications Components Repository (BIACOMP), RCU will create an additional schema, named BIACM_IO. Do not modify or delete this schema. It is required for metadata access by the different Oracle BI Applications components.
Oracle Data Integrator Master and Work Repository	<prefix>_BIA_ODIREPO (required for all deployments).

8. Click **Next** to display the Schema Passwords screen.
9. On the Schema Passwords screen, specify and confirm a password for the schemas, then click **Next** to proceed to the Custom Variables screen.

Note: The RCU uses .dmp files to create the required schemas. Before you perform the action in the Custom Variables screen, you must copy the .dmp files for each schema to a directory with global write access on the appropriate database server host machine. (RCU writes log files to this directory). The .dmp files are located in BIA_RCU_HOME\rcu\integration\biapps\schema.

10. In the **Value** field in the Custom Variables screen, for each schema enter the directory path of the folder on the database server that contains the .dmp file.

Note: Do not include the name of the .dmp file in the directory path.

Click **Next** to proceed to the Map Tablespaces screen.

11. The Map Tablespaces screen displays the default and temporary tablespaces for the schemas. On this screen, do the following:
 - a. Leave the default values for Default Tablespace and Temp Tablespace for each schema.
 - b. Set the temporary tablespace size for the data warehouse tablespaces according to the values in the table below:
 - Click **Manage Tablespaces**.
 - In the left-side navigation panel, select the appropriate tablespace name.
 - In the main window, select the tablespace name under the Datafiles heading.
 - Click the Edit icon to display the Datafile dialog.
 - In the Edit Datafile dialog, set the temporary tablespace size according to the table below:

Tablespace	Value
<prefix>_DW_DATA	Size: 20 GB Maximum Size: Unlimited Leave the remaining default values.

Tablespace	Value
<prefix>_DW_IDX	Size: 5 GB Maximum Size: Unlimited Leave the remaining default values.
<prefix>_DW_STG	Size: 10 GB Maximum Size: Unlimited Leave the remaining default values.
<prefix>_DW_TEMP	Size: 15 GB Maximum Size: Unlimited Leave the remaining default values.

Click **OK** to exit the Edit Datafile dialog. Then, click **Next** in the Map Tablespaces screen, and click **OK** in the message dialog to create the tablespaces for the schemas.

- On the Summary screen, click **Create** to start the schema creation process.

When the schemas are created with no errors, the Completion Summary screen is displayed.

- On the Completion Summary screen, click **Close**.

3.3.3 Installing Oracle BI Applications Using the Business Analytics Applications Suite Installer

Run the Business Analytics Applications Suite installer to install Oracle BI Applications. This installer runs in software only mode.

You must run the Business Analytics Applications Suite installer on the machine where you ran the Oracle BI EE installer. All files are installed to disk in the Oracle Home for BI directory. Note that you will perform post-installation steps to configure Oracle BI Applications in a later procedure.

Prerequisite to Running the Business Analytics Applications Suite Installer

Make sure you have met the following prerequisites before you run the Business Analytics Applications Suite installer:

- The installer is a generic installer and requires JDK or JRockit to be installed. See [Section 3.2.1, "Installing JDK or JRockit,"](#) for more information.
- 35 GB free disk space is required to run the Business Analytics Applications Suite installer. This disk space will be released after the installer finishes.

To run the Business Analytics Applications Suite installer:

- Launch the Business Analytics Applications Suite installer by entering the following:

The Business Analytics Applications Suite installer displays the Welcome screen.

Platform	Command
Windows	<p>In a command prompt:</p> <pre>setup.exe -jreLoc <Drive:\...\jdk or jrockit location></pre> <p>Where <code>jdk</code> or <code>jrockit location</code> is the directory that contains the <code>bin</code> folder.</p> <p>For example:</p> <pre>setup.exe -jreLoc C:\jdk</pre>
UNIX and Linux	<pre>./runInstaller -jreLoc <jdk or jrockit location></pre>

Note: If you are running the installer on a Linux machine that does not have the file `/etc/oraInst.loc`, the Specify Inventory Location screen will display. For information about this screen, see [Section B.1, "Specify Inventory Location."](#)

- Click **Next** to display the Prerequisite Checks screen.

This screen analyzes the host computer to ensure that specific operating system prerequisites have been met. If any of the prerequisite checks fail, then an error message appears in the bottom portion of the screen. Fix the error and click **Retry** to try again. If you want to ignore the error or warning messages and continue with the installation, click **Continue**. Click **Abort** to stop prerequisite checking for all components.

- Click **Next** to display the Specify Installation Location screen.
- In the Specify Installation Location screen, specify the details of the Oracle BI EE installation.

Field	Action
Oracle Middleware Home	<p>Specify the path to the directory for an existing Oracle Middleware home where Oracle BI EE has been installed.</p> <p>If you do not know the location of the directory, click Browse to locate the directory on your system.</p>
Oracle Home Directory	<p>Specify the Oracle Home for BI; for example, <code>Oracle_BI1</code>. Do not specify any other Oracle home or choose to create a new one. The Oracle Home for BI directory is where the software binary files for Oracle BI Applications will be installed.</p>

If you are installing on a Windows operating system, make sure that the directory paths are valid and do not contain double back-slashes (`\\`).

- Click **Next** to display the Summary screen.
- In the Summary screen, review the summary information, and click **Next** to start the installation.

The installer installs the Oracle BI Applications folders and files in the Oracle Home for BI directory.

Note: Even when the progress bar on the installer reports 100% complete, you must wait until the **Finish** button is displayed.

7. Click **Finish**.

3.3.4 Applying Platform Patches

You must apply Fusion Middleware platform patches. The patches are available for download as part of the Oracle Business Intelligence Applications 11.1.1.8.1 media pack. Oracle BI EE patches from Bundle Patch 131017 are included and will be applied to Oracle BI EE 11.1.1.7.0.

You will run a script to apply the patches. The script is a Perl script and is available in `<BI_Oracle_Home>/biapps/tools/bin/APPLY_PATCHES.pl`.

The Perl script you will run to apply the patches requires a parameter input file (`apply_patches_import.txt`). In this procedure, before you run the Perl script, you will update the parameter input file to reflect the appropriate directory paths.

Notes on Patching

The BI Administration Tool has to be patched to BI 131017 as follows: If you have applied the BI EE Bundle Patch 131017 as part of the procedure 3.3.4 Applying Platform Patches, or if you had applied Bundle Patch 13107 earlier but had not applied the patch to your BI Administration Tool instances, then you must patch BI Administration Tool as part of this procedure.

If you have applied a Bundle Patch version higher than 131017, then you must ensure that BI Administration Tool has been appropriately patched.

The BI EE Client Installer executable is delivered in patch `p17463403_111170_Generic`. This patch is available in

- `PATCH_ROOT_DIR\biappsshphome\generic` or

- `PATCH_ROOT_DIR/biappsshphome/generic`. For the location of your `PATCH_ROOT_DIR`, see Section 3.3.4 Applying Platform Patches.

System administrators must provide the BI EE Client Installer executable to developers who have installed BI Administration Tool on Windows machines. On Windows machines where BI Administration Tool has been installed:

Run `biee_client_install_x64.exe` obtained on unzip of the patch zip file.

Select 'Modify an existing instance'.

Note: If BI Clients have not been installed then provide the `biee_client_install_x64.exe` executable file in the patch to developers to install the BI Clients. Run `biee_client_install_x64.exe` obtained on unzip of the patch zip file. Select 'Install a new instance'.

To apply platform patches:

1. Shut down WebLogic Administration Server, Managed Server, and Node Manager. Shut down BI processes using Oracle Process Manager and Notification Server (OPMN).
2. Download "Oracle Fusion Middleware Platform Patches for Oracle Business Intelligence Applications" and "Oracle Fusion Middleware Platform Patches for Oracle Business Intelligence Applications for <OS>" from the Oracle Business Intelligence Applications 11.1.1.8.1 media pack on Oracle Software Delivery Cloud. Download all parts.
3. Extract all .zip files into the same Patch Home directory, as follows:
Extract the contents of the downloaded .zip files containing the patches into the same directory, for example, `C:\patches` or `PATCH_HOME/patches`.

Note: The directory structure of the extracted contents is not patches4fa/dist/ps6rc3. The patches are contained in folders: biappsshphome, odi, weblogic and oracle_common. You do not have to unzip the individual patches.

4. Update the parameter input file (apply_patches_import.txt) to reflect the paths as specified in the text file:
 - a. Create a writable directory where logs and temporary patch files will be stored. In the apply_patches_import.txt file, you will set the WORKDIR= variable to point to the path for this directory.
 - b. Open apply_patches_import.txt, which is located in the <BI_Oracle_Home>/biapps/tools/bin directory.
 - c. Specify the following directory paths:

Directory	Path
JAVA_HOME	Path of the JDK you installed for your platform.
INVENTORY_LOC	Path of the Oracle\Inventory directory. For example: C:\Program Files\Oracle\Inventory.
ORACLE_HOME	Path of the Oracle Home for BI directory.
MW_HOME	Path of the Oracle Middleware Home directory.
COMMON_ORACLE_HOME	Path of the oracle_common directory, which is under the Middleware Home directory.
WL_HOME	Path of the Oracle WebLogic Server Home directory.
ODI_HOME	Path of the ODI Home directory.
WINDOWS_UNZIP_TOOL_EXE	If the platform is Windows, then specify an unzip tool EXE file with the complete path. The supported unzip tools are Winzip command line and 7-Zip command line. For example, for the Winzip tool: c:{PathSep}Program Files{PathSep}WinZip{PathSep}wzunzip.exe For example, for the 7-Zip tool: c:{PathSep}Program Files{PathSep}7-Zip{PathSep}7z.exe
WORKDIR	Path of a writable directory where logs and temporary patch files are stored.
PATCH_ROOT_DIR	Path of the patch directory. For example: C:\patches or PATCH_HOME/patches

5. To apply the patch, run the following command from <BI_Oracle_Home>/perl/bin:

```
$ perl <BI_Oracle_Home>/biapps/tools/bin/APPLY_PATCHES.pl <BI_Oracle_Home>/biapps/tools/bin/apply_patches_import.txt
```

For example:


```
<BI_Oracle_Home>/perl/bin/perl <BI_Oracle_Home>/biapps/tools/bin/APPLY_PATCHES.pl <BI_Oracle_Home>/biapps/tools/bin/apply_patches_import.txt
```

6. Confirm that all patches have been applied successfully by reviewing the following log files in the directory specified by WORDIR:
 - final_patching_report.log (summary of patch application)
 - biappshiphome_generic_patches.log
 - biappshiphome_<OS specific>_patches.log
 - odi_generic_patches.log
 - oracle_common_generic_patches.log
 - weblogic_patching.log
7. Start WLS Administration Server, Node Manager, and BI Managed Server. You must start the BI Managed Server using WLS Admin Console. Start the BI processes using OPMN.
8. Make sure that the Dynamic Monitoring Service patch 16569379 is applied to your BI system.

The Dynamic Monitoring Service patch 16569379 is included the FMW Patches for BI Applications 11.1.1.8.1 under PATCH_HOME/patches/biappshiphome/<OS folder>, and is applied when the Patch Application Script (APPLY_PATCHES.pl) is run.

3.3.5 Updating ATGLite

This section provides instructions for updating the ATGLite data in the BIACOMP schema.

To update ATGLite:

- Run the following command:

```
java -jar biappsrepositoryutil.jar upgradeATG <mandatory parameters>
```

Where the mandatory parameters are as follows:

Parameter	Description
bi.oracle.home	Full path of the Oracle BI home.
work.dir	Working directory to be used for the run. Log files will be created for each run and saved in this directory. The naming convention for the SQL log file is atgUpgradeSQLYYYY-MM_DD_HH_MM.log. Log files will be available only if they are not empty.
db.conn.sid.url	Connection to the database that hosts the BIACOMP schema. The format is host:port:SID. For example: host.domain:1521:orcl. If you are using Oracle Database 12c pluggable database (PDB), then use the format host:port/ServiceName. For example, host:port/orcl.mycompany.com.
biacomp.user	BIACOMP schema owner.
biacomp.password	BIACOMP schema owner's password.

Parameter	Description
atg.db.seed.url	URL used to connect to the BIACOMP schema. (The ATG user is the BIACOMP schema owner.) The format is host:port/ServiceName. For example: host:port/orcl.mycompany.com.
db.sys.user	Database system user name.
db.sys.password	Database system user password. Note: If this parameter is not passed in the command line, then the tool will request the password at runtime.

Example

```
java -jar biappsrepositoryutil.jar upgradeATG
bi.oracle.home=scratch/MiddleWareHome/Oracle_BI1/
work.dir=scratch/workfolder biacomp.user=BIAPPS_BIACOMP
biacomp.password=password db.conn.sid.url=<host>:<database port>:<SID>
atg.db.seed.url=<host>:<database port>/<ServiceName> db.sys.user=sysuser
db.sys.password=password
```

3.3.6 Updating FSM

This section provides instructions for updating the FSM data in the BIACOMP schema.

To update FSM:

- Run the following command:

```
java -jar biappsrepositoryutil.jar upgradeFSM <mandatory parameters>
```

Where the mandatory parameters are as follows:

Parameter	Description
bi.oracle.home	Full path of the Oracle BI home.
work.dir	Working directory to be used for the run. Log files will be created for each run and saved in this directory. The naming convention for the SQL log file is fsmUpgradeSQLYYYY-MM_DD_HH_MM.log. Log files will be available only if they are not empty.
db.conn.sid.url	Connection to the database that hosts the BIACOMP schema. The format is host:port:SID. For example: host.domain:1521:orcl. If you are using Oracle Database 12c pluggable database (PDB), then use the format host:port/ServiceName. For example, host:port/orcl.mycompany.com.
biacomp.user	BIACOMP schema owner.
biacomp.password	BIACOMP schema owner's password.
fsm.db.seed.url	URL used to connect to the BIACOMP schema. (The FSM user is the BIACOMP user.) The format is host:port/ServiceName. For example: host:port/orcl.mycompany.
db.sys.user	Database system user name.

Parameter	Description
db.sys.password	Database system user password. Note: If this parameter is not passed in the command line, then the tool will request the password at runtime.

Example

```
java -jar biappsrepositoryutil.jar upgradeFSM
bi.oracle.home=scratch/MiddleWareHome/Oracle_BI1/
work.dir=scratch/workfolder biacomp.user=BIAPPS_BIACOMP
biacomp.password=password db.conn.sid.url=<host>:<database port>:<SID>
fsm.db.seed.url=<host>:<database port>/<ServiceName> db.sys.user=sysuser
db.sys.password=password
```

3.3.7 Configuring Oracle BI Applications

You run the configApps.bat or configApps.sh file to extend the BI Domain to deploy Oracle BI Applications and to configure the components.

During this phase, the following key configurations occur:

- Oracle BI Applications Configuration Manager, Functional Setup Manager, ODI Java EE Agent, ODI Console, and Load Plan Generator are deployed into WebLogic Server.
- Component wiring is performed.
- A BI Applications Administrator User (with full access to Configuration Manager and access to ODI with the Supervisor role) is created in WebLogic Server embedded LDAP.
- The Oracle Data Integrator Repository for Oracle BI Applications is configured and set to use external authentication (that is, authentication against the WebLogic Server embedded LDAP).

The configApps.bat and configApps.sh files are located in <BI_Oracle_Home>/bin.

To configure components by running the configApps.bat or configApps.sh file:

1. Before running the configApps process, ensure that WLS Admin Server, Node Manager, and BI Services are running.
2. Start the configuration utility from the bin directory in the BI_Oracle_Home (default folder name is Oracle_BI1), based on the operating system:

UNIX commands:

```
cd BI_Oracle_Home/bin
```

```
./configApps.sh
```

Windows commands:

```
cd BI_Oracle_Home\bin
```

```
configApps.bat
```

3. On the Welcome screen, click **Next**.
4. On the Prerequisite Checks screen, after the prerequisite checks conclude with no errors, click **Next**.

If an error message appears, fix the error and then click **Retry** to run the prerequisite check again (recommended). Repeat this until all prerequisite checks conclude with no errors. To stop the configuration process while you fix a prerequisite error, click **Abort**. To ignore an error or warning message, and continue with the configuration process, click **Continue** (not recommended).

Note: The configuration might not function normally if you continue without resolving the issue that caused an error or warning message during the prerequisite checks.

5. On the Extend BI Domain screen, specify the following:

Field	Description
Host Name	The host name of the computer on which the WebLogic Server domain exists. This field is read-only.
Port	Specify the port number over which the WebLogic Server domain communicates. The default is 7001.
User Name	Specify the user name for logging into the WebLogic Server.
User Password	Specify the password for logging into the WebLogic Server.

Click **Next**.

6. The Specify Installation Location screen displays the following information.

Field	Description
Middleware Home	Specify the path to the directory for an existing Oracle Middleware Home where Oracle BI EE has been installed. This field is read-only.
Oracle Home	The Oracle Home for BI, which is the location where Oracle BI EE, and Oracle BI Applications files are installed. This field is read-only.
WebLogic Server Home	The directory name for the WebLogic Server. The value in this field is read-only and is the host name you specified in the Middleware Home field.
Domain Home	The home directory for the domain associated with the Oracle Business Intelligence system. This field is read-only.
Instance Home	The path to the Oracle Instance directory. The installer installs component configuration files and runtime processes in the Oracle Instance directory. Runtime components write to this directory only. The directory that you identify for the Oracle Instance can be located anywhere on your system, and does not need to be inside the Oracle Middleware Home. This field is read-only.
Instance Name	The name of the Oracle Business Intelligence instance. By default, the location is based on the value in the Instance Home field. This directory is commonly referred to as ORACLE_INSTANCE. The value in this field is read-only.

Click **Next**.

7. On the Configure Components screen, to deploy Oracle BI Applications, select **BI Application Components**.

Click **Next**.

8. On the RPD Encryption Password screen, specify the following:

Field	Description
RPD Password	Specify the password used to encrypt the RPD.
Confirm RPD Password	Confirm the password used to encrypt the RPD.

Click **Next**.

9. On the BI Applications Administrator User screen, specify the following:

Field	Description
Username	Specify a user name for the Oracle BI Applications Administrator. Note: Do not enter "Administrator," "Admin," "Sadmin," or "Supervisor" in upper case, lower case, or mixed case letters. These user names are reserved. Also, do not use the WebLogic Server administrator user name.
Password	Specify a password for the Oracle BI Applications Administrator.
Confirm Password	Confirm the password.

Note these credentials because this user will be used to perform system setups and is the user that is used for communications between the Oracle BI Applications Configuration Manager and Oracle Data Integrator. This user has full access privileges in Configuration Manager and access to Oracle Data Integrator with the Supervisor role.

Click **Next**.

10. On the MDS Schema screen, specify the following:

Field	Description
Database Type	The type of database that hosts the MDS schema. The only supported database type is Oracle.
Connect String	The connect string used to access the MDS schema.
MDS Schema Username	The schema name for the MDS schema.
MDS Schema Password	The password for the MDS schema.

Note: The values for user name and password must match the values you entered when you ran the Fusion Middleware RCU in [Section 3.2.3, "Running Fusion Middleware RCU."](#)

Click **Next**.

11. On the BI Applications Components Repository Schema screen, specify the following:

Field	Description
Database Type	Select the type of database that hosts the Oracle BI Applications Components Repository schema. The only supported database type is Oracle.
Connect String	Specify the connect string used to access the Oracle BI Applications Components Repository schema. Use the format: <i>host:port:service_name</i>
BIA Components Repository Schema Username	Specify the schema name for the Oracle BI Applications Components Repository schema.
BIA Components Repository Schema Password	Specify the password for the Oracle BI Applications Components Repository schema.

Click **Next**.

12. On the Business Analytics Warehouse Schema screen, specify the following:

Field	Description
Database Type	Specify the type of database that hosts the Business Analytics Warehouse schema. The only supported database type is Oracle.
Connect String	Specify the connect string used to access the Business Analytics Warehouse schema. Use the format: <i>host:port:service_name</i>
Business Analytics Warehouse Schema Username	Specify the schema name for the Business Analytics Warehouse schema.
Business Analytics Warehouse Schema Password	Specify the password for the Business Analytics Warehouse schema.

Click **Next**.

13. On the BI Applications ODI Repository Schema screen, specify the following:

Field	Description
Database Type	Specify the type of database that hosts the ODI Repository schema. The only supported database type is Oracle.
Connect String	Specify the connect string used to access the ODI Repository schema. Use the format: <i>host:port:service_name</i>
ODI Repository Schema Username	Specify the schema name for the ODI Repository schema. The default name is <prefix>_BIA_ODIREPO. This is the repository you created when you ran the Business Analytics Applications Suite RCU.
ODI Repository Schema Password	Specify the password for the ODI Repository schema.

Click **Next**.

14. On the Configure Ports screen, specify the following:

Field	Description
Auto Port Configuration	Select this option if you want Oracle Business Analytics Applications Suite installer to configure the ports for you.
Specify Ports Using Configuration File	Select this option to use a configuration file to configure the ports. Optionally, click Browse to specify a configuration file location. Click View/Edit File to view or edit the file. A sample configuration file named staticport.ini is provided. The file is stored in the Disk1\stage\Response directory of the Business Analytics Applications Suite installer. You can edit this file to specify the configuration settings for your environment.

15. On the Summary screen, click **Save** to save the settings for this configuration in a response file (optional), and then click **Configure** to start the configuration process.
16. On the Configuration Progress screen, you can monitor the progress of the software configuration and respond to errors, if any occur.

After the configuration concludes without any errors, click **Next**.
17. On the Complete screen, click **Save** to save the settings for this installation in a response file (optional), and then click **Finish** to exit the Oracle Business Intelligence Configuration Assistant.

3.3.8 How to Start the BI and Oracle Data Integrator Managed Servers

Note that Oracle BI Applications requires the BI and Oracle Data Integrator Managed Servers (bi_server1 and odi_server1) to be started using Node Manager. This is required so that parameters, memory, and JVM arguments are appropriately set. If you do not start the BI and Oracle Data Integrator Managed Servers, functionality loss and memory issues can occur in Oracle BI Applications Configuration Manager, Functional Setup Manager, and Oracle Data Integrator.

To ensure that the BI and Oracle Data Integrator Managed Servers are started using Node Manager, start them using the WebLogic Administration Console user interface. Do not start the BI and Oracle Data Integrator Managed Servers using the Managed Server start scripts.

3.3.9 Installing ODI Studio

ODI Studio is a desktop client that enables you to design and manage the ODI Repository. ODI Studio is typically installed on developer machines. The supported operating systems for ODI Studio are Windows 32-bit and 64-bit and Linux 32-bit.

To install ODI Studio, perform the following procedures:

- [Section 3.3.9.1, "Installing ODI Studio"](#)
- [Section 3.3.9.2, "Configuring User Access for ODI Studio"](#)

3.3.9.1 Installing ODI Studio

You install ODI Studio using the Oracle Data Integrator installer.

Note the following points:

- On the Select Installation Type screen, you must select **Developer Installation** as the installation type and both options under Developer Installation, that is, **ODI Studio (with local agent)** and **ODI SDK**.
- On the Repository Configuration screen, you must select the **Skip Repository Configuration** option.

For instructions on installing ODI Studio, see *Oracle Fusion Middleware Installation Guide for Oracle Data Integrator*.

3.3.9.2 Configuring User Access for ODI Studio

The Oracle Data Integrator Repository is configured for external authentication against WebLogic Server's embedded LDAP server. ODI Studio must be configured to use the appropriate security files for authentication. You must perform these steps on all installations of ODI Studio.

Note: You must perform these steps even if ODI Studio has been installed on the machine where Oracle Home for BI resides.

To configure user access for ODI Studio:

1. Copy `cwallet.sso` and `jps-config-jse.xml` from:

```
<MW_Home>/user_projects/domains/bifoundation_domain/odi-client-config/embedded
```

To:

```
<ODI_Home>/oracledi/client/odi/bin
```

2. Edit `<ODI_Home>/oracledi/client/odi/bin/odi.conf` by updating the JPS configuration file name as follows:

```
AddVMOption -Doracle.security.jps.config=./jps-config-jse.xml
```

If you do not successfully complete these steps, you will receive the following error message: 'ODI-10188: Error while login from OPSS<...>/jps-config.xml (No such file or directory).'

3. Perform steps 1 and 2 on all instances of ODI Studio.

Note: You must perform these steps even if ODI Studio has been installed on the machine where Oracle Home for BI resides.

If the BI Applications Administrator password or any ODI users' passwords were changed, administrators need to regenerate security files and redistribute the files to all instances of ODI Studio.

To regenerate security files:

1. Execute the `wlst.sh` script:

```
ORACLE_HOME/common/bin/wlst.sh <MW_Home>/Oracle_
BI1/bifoundation/install/createJPSArtifactsODI.py embedded --ADMIN_USER_NAME
<Administrator> --DOMAIN_HOSTNAME <Hostname> --DOMAIN_PORT 7001 --DOMAIN_HOME_
PATH <MW_Home>/user_projects/domains/bifoundation_domain
```

Where `ADMIN_USER_NAME` is the WebLogic Server administrator user.

The updated JPS configuration file and credential wallet are created at location:

```
<MW_Home>/user_projects/domains/bifoundation_domain/odi-client-config/embedded
```

2. Copy these updated files to `<ODI_Home>/oracledi/client/odi/bin` on all ODI Studio instances.

3. Make sure that the `odi.conf` file is edited correctly, as described in step 2 in the previous procedure for configuring user access for ODI Studio.

The `odi.conf` file is located in `<ODI_Home>/oracledi/client/odi/bin`.

3.3.10 Applying the ODI Studio Patch

The ODI Studio patch is available in `PATCH_ROOT_DIR\odi\generic` or `PATCH_ROOT_DIR/odi/generic`. For an explanation of the `PATCH_ROOT_DIR`, see [Section 3.3.4, "Applying Platform Patches."](#)

System administrators must provide this patch to developers who have installed ODI Studio on their machines.

Follow the instructions in the Patch Readme to apply the patch on ODI Studio.

Note: If you installed ODI Studio on the BI Domain host machine, you do not have to apply the patch.

3.3.11 Copying Source Files

During installation of Oracle BI Applications, source files are installed in the `BI_Oracle_Home/biapps/etl` directory. These files are used during the ETL process and will be configured by functional developers. You must copy these files to a location that ODI Agent deployed in WebLogic Server can access but that is outside of the Oracle Home directory; otherwise, when the Oracle BI Applications environment is upgraded or patched, these files will be overwritten.

To copy source files:

1. Navigate to the `BI_Oracle_Home/biapps/etl` directory.
2. Copy all files under the `BI_Oracle_Home/biapps/etl` directory into a location that ODI Agent deployed in WebLogic Server can access but is outside of the Oracle Home directory.

Note the following points:

- Avoid copying the files to a location with a long directory path.
- Do not put the files under the ODI Home directory.
- Depending on your deployment, there may be files in the `BI_Oracle_Home/biapps/etl` directory that you will not use.

3.3.12 Next Steps

The next step in the installation and setup process is to perform the system setup tasks in [Chapter 4, "Performing Post-Installation System Setup Tasks."](#) These tasks are required to complete integration of the Oracle BI Applications components and to ready the system for functional configurations and data loads.

Performing Post-Installation System Setup Tasks

This chapter provides instructions for performing post-installation system setup tasks.

This chapter contains the following topics:

- Section 4.1, "Setting the Business Analytics Warehouse Connection in Oracle Data Integrator"
- Section 4.2, "Performing Setup Steps for On-Premise Fusion Applications Sources"
- Section 4.3, "Registering Source Systems and Propagating Connection Details to Oracle Data Integrator"
- Section 4.4, "Enabling Offerings for Deployment"
- Section 4.5, "Setting Languages for Data Load into the Business Analytics Warehouse"
- Section 4.6, "Running the Domains Load Plan"
- Section 4.7, "Mapping Externally Conformed Domains"
- Section 4.8, "Granting Users Access to Configuration Manager, FSM and Oracle Data Integrator"
- Section 4.9, "Editing Preferred Currency Display Names and Enabling Document Currency"
- Section 4.10, "Enabling Initialization Blocks"
- Section 4.11, "Trimming the RPD"
- Section 4.12, "Setting Up Fusion Applications Cloud Data Sources"
- Section 4.13, "Next Steps"

4.1 Setting the Business Analytics Warehouse Connection in Oracle Data Integrator

Use ODI Studio to set the connection properties in the Oracle Data Integrator Repository of the physical schema associated with the 'BIAPPS_DW_FILE' physical server.

To set the Business Analytics Warehouse physical schema connection in Oracle Data Integrator:

1. Log into ODI Studio using the BI Applications Administrator credentials.

2. In the navigation pane, go to Topology, and expand Technologies, and then expand File.
3. Double-click BIAPPS_DW_FILE.
4. In the Definition pane, for the Directory (Schema) and Directory (Work Schema) properties, specify the directory where you copied source files to in [Section 3.3.11, "Copying Source Files,"](#) and include the sub-folders data_files/src_files/BIA_11.

For example:

```
<source file home>/biapps/etl/data_files/src_files/BIA_11
```

4.2 Performing Setup Steps for On-Premise Fusion Applications Sources

The following procedures apply to on-premise Oracle Fusion Applications sources:

- [Section 4.2.1, "Creating a User for ETL"](#)
- [Section 4.2.2, "Configuring the Oracle BI Repository for ETL"](#)

4.2.1 Creating a User for ETL

This procedure applies only to on-premise Fusion Applications sources.

The ETL process must be run by a user with appropriate data security privileges granted on the Fusion Applications tables from which data is extracted into Oracle Business Analytics Warehouse. For this purpose, the enterprise role named FUSION_APPS_OBIA_BIEE_APPID is provisioned during the installation of Fusion Applications with the appropriate ETL security privileges.

Work with your security administrator for Fusion Applications to complete the steps below.

To create a user for ETL:

1. In the Fusion Applications LDAP system, create a new user.
For example, you might create a new user named OBIA_ETL_USER.
2. Make the user a member of the Enterprise Role FUSION_APPS_OBIA_BIEE_APPID.
3. Make a note of the user credentials.

4.2.2 Configuring the Oracle BI Repository for ETL

This procedure applies only to on-premise Fusion Applications sources.

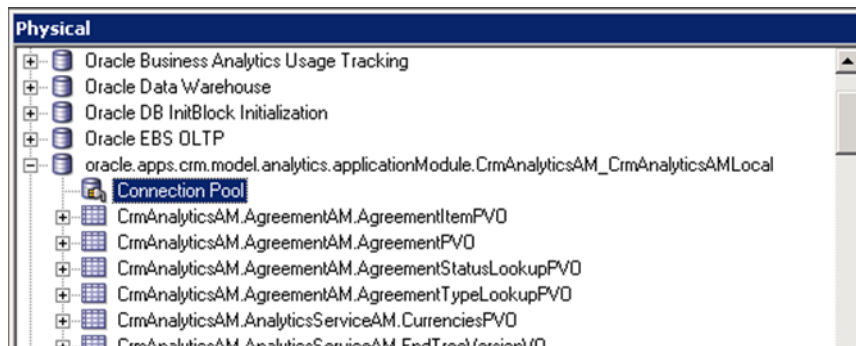
To configure the RPD for ETL against on-premise Fusion Applications sources:

1. Log into the Oracle BI Administration Tool.
2. Open the Oracle BI repository for Oracle BI Applications in offline mode.
3. In the Physical layer, configure a connection to the BIEE broker for each of the Fusion Applications pillar domains. Set the connection for each of the following Physical layer objects:

Pillar	Physical Layer Object
CRM	oracle.apps.crm.model.analytics.applicationModule.CrmAnalyticsAM_CrmAnalyticsAMLocal

Pillar	Physical Layer Object
FSCM	oracle.apps.fscm.model.analytics.applicationModule.FscmTopModelAM_ FscmTopModelAMLocal
HCM	oracle.apps.hcm.model.analytics.applicationModule.HcmTopModelAnalytic sGlobalAM_HcmTopModelGlobalAMLocal

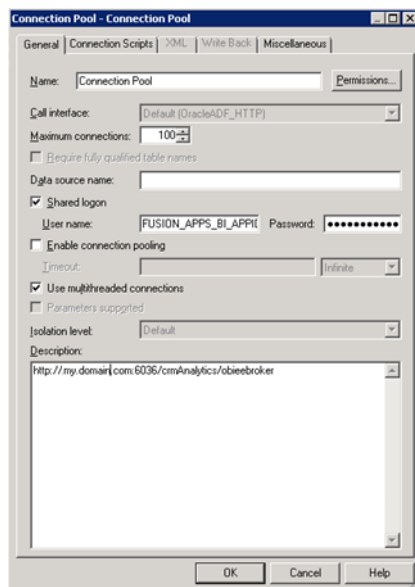
- a. Right-click one of the pillar objects, and select **Properties**.
- b. In the General tab of the Database dialog, select **Allow direct database requests by default**.
- c. Expand the pillar object, and double-click **Connection Pool**.



The Connection Pool dialog opens.

- d. In the General tab, enter **FUSION_APPS_BI_APPID** as the data source user name, and enter the password for this user.

You can obtain the password for the FUSION_APPS_BI_APPID user from your Fusion Applications administrator.



- e. In the Miscellaneous tab, in the **Application Server URL** field, enter the URL for the BIEE broker for the appropriate pillar, in the format:

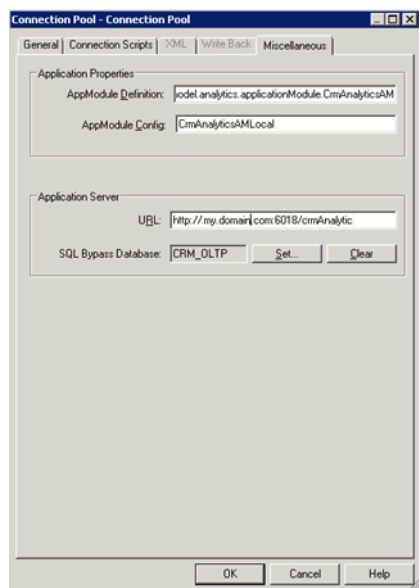
Http://<host>.<domain>:<port>/<pillar>Analytics/obieebroker

For example:

Http://machineName.myDomain.com:30615/crmAnalytics/obieebroker

- f. In the **SQL Bypass Database** field, enter <PILLAR>_OLTP.

For example: CRM_OLTP.



- g. Repeat steps 3a through 3e for each of the three pillars.
- 4. Set the value for the following DSN variables. These variables specify the connection to the Fusion Applications transactional database.
 - CRM_OLTP_DSN
 - FSCM_OLTP_DSN
 - FBI_OLTP_DSN
 - HCM_OLTP_DSN
 - OLTP_DSN (used by the Marketing OLTP data source)
- a. In the menu bar, select **Manage, Variables**.
- b. In the Variable Manager dialog, scroll down to locate the <PILLAR>_OLTP_DSN variable.
- c. Double-click the <PILLAR>_OLTP_DSN variable.

The Static Repository Variable dialog opens.
- d. In the **Default Initializer** text box, enter the connection information to the Fusion Applications transactional database in the tnsnames.ora format.

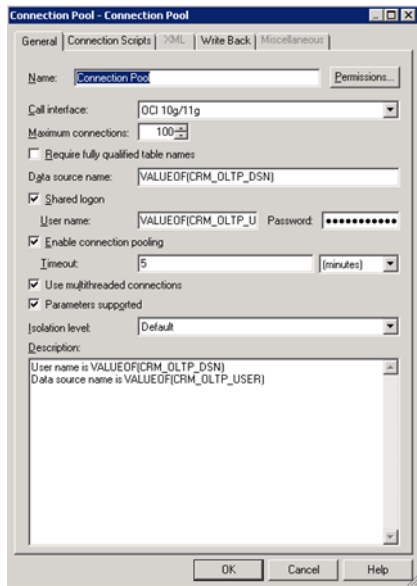
For example:

```
' (DESCRIPTION= (ADDRESS= (PROTOCOL=TCP)
(HOST=db_host_machine.domain.com)
(PORT=<port>)) (CONNECT_DATA =
(SERVICE_NAME=<service_name>))) '
```

- e. Repeat steps 4a through 4e for each DSN.
5. Set the value for the following user variables. These variables specify the Fusion Applications transactional database user.
 - CRM_OLTP_USER
 - FSCM_OLTP_USER
 - FBI_OLTP_USER
 - HCM_OLTP_USER
 - OLTP_USER (used by the Marketing OLTP data source)
 - a. Obtain the user name for the users listed above from the RPD for Oracle Transactional Business Intelligence.
 - b. Obtain the password for the users from the Fusion Applications administrator. You will need this password in a later step.
 - c. In the menu bar, select **Manage, Variables**.
 - d. In the menu bar of the Variable Manager dialog, select **Action, New, Repository, Variable**.
 - e. In the Variable Manager dialog, scroll down to locate the <PILLAR>_OLTP_USER and OLTP_USER variables.
 - f. Double-click the variable.
The Static Repository Variable dialog opens.
 - g. In the **Default Initializer** text box, enter the user name.
 - h. Repeat steps 4a through 4e for each user.
6. Configure the connection pool for each of the following OLTP objects listed in the Physical layer:
 - CRM_OLTP
 - FSCM_OLTP
 - FBI_OLTP
 - HCM_OLTP
 - Marketing OLTP
 - a. Expand the object.
 - b. Double-click **Connection Pool**.
For Marketing OLTP, double-click **Fusion OLTP Connection Pool**.
The Connection Pool dialog opens.
 - c. In the **Data source name** field, enter VALUEOF(<PILLAR>_OLTP_DSN).
For example: VALUEOF (CRM_OLTP_DSN) .
For Marketing OLTP, enter VALUEOF (OLTP_DSN)
 - d. In the **User name** field, enter VALUEOF(<PILLAR>_OLTP_USER).
For example: VALUEOF (CRM_OLTP_USER) .
For Marketing OLTP enter VALUEOF (OLTP_USER) .

Note: The user for CRM_OLTP, FSCM_OLTP, FBI_OLTP, and HCM_OLTP is the same. The user for Marketing OLTP is the value of OLTP_USER, which is different from the user for the other pillars.

- e. In the **Password** field, enter the password for the user. Obtain this password from the Fusion Applications administrator.



- f. Repeat steps 6a through 6e for each of the OLTP objects.

4.3 Registering Source Systems and Propagating Connection Details to Oracle Data Integrator

Follow this procedure to register a source system and propagate the connection details to Oracle Data Integrator.

To register a source system:

1. Launch Oracle BI Applications Configuration Manager using the URL `http://<host>:<port>/biacm`, and log in as the BI Applications Administrator user. **Note:** This user was created in the procedure [Section 3.3.7, "Configuring Oracle BI Applications."](#)
2. In the navigation pane, select the **Define Business Intelligence Applications Instance** link, which appears under System Setups.
The Source Systems tab is displayed.
3. Click the **Add** icon.
The Register Source dialog is displayed.
4. To register the source in Configuration Manager, specify the following properties:

Property	Description
Product Line	Select the source instance product line. For Oracle Fusion sources, select Oracle Fusion.
Product Line Version	Select the version number of the source instance product line.

Property	Description
Source Instance Name	Specify a name for the source instance. This is the name given by the BI Applications System Administrator to a transactional system that serves as a source of data for BI Applications data load. The source instance is important because functional setup tasks, and the setting of values for objects such as parameters and domain maps are performed in relation to a source instance.
Description	(Optional) Enter additional information about the source instance.
Data Source Number	Enter a unique number to identify the source instance. The Data Source Number value specifies a data source so that the data can be identified in the Oracle Business Analytics Warehouse. Each source instance must have a unique Data Source Number.
Data Server	For all sources except PeopleSoft sources, a read-only list of data servers is displayed. For PeopleSoft Enterprise sources, in the Data Server Details window, select the appropriate data server for the source instance.

Click **Next**. The Register Source in Oracle Data Integrator Topology page is active.

5. To register the source in Oracle Data Integrator, do the following:

a. Select **Global** from the Context drop-down list.

The Global value is required because the Oracle BI Applications interfaces are designed to use this value.

b. In the Technology: Oracle tab, specify the following properties:

Property	Description
ODI Data Server Name	Specify a name for the ODI Data Server that indicates the transactional OLTP database (source database). This ODI Data Server Name must be unique across all ODI data servers in the ODI Repository.
JDBC Driver	The name of the JDBC driver for the transactional OLTP database (source database) connection. For Oracle Fusion sources, this property indicates the name of the JDBC driver for the Oracle BI Server. For example: <code>oracle.bi.jdbc.AnaJdbcDriver</code> . Note: Data from the Fusion Applications transactional system is retrieved from the Oracle BI Server. Oracle recommends that you use the default value.
JDBC URL	Specify the JDBC URL for the transactional OLTP database (source database) connection. The format for the URL is the following: <code>jdbc:oracle:thin:@<host>:<port>:<sid></code> For Oracle Fusion sources, specify the JDBC URL for the Oracle BI Server. The format is <code>jdbc:oraclebi://<sid>:<port></code> .
Database Username	Specify the database user name for the transactional OLTP database (source database). For Oracle Fusion sources, specify the user name of the ETL user. This is the user created in Section 4.2.1, "Creating a User for ETL."

Property	Description
Database Password	Specify the password for the transactional OLTP database (source database). For Oracle Fusion sources, specify the password for the ETL user.
Test	Use this button to test the connection to the transactional OLTP database (source database).

c. In the Technology: File System tab, specify the following properties:

Property	Description
ODI Data Server Name	Specify a name for the file system data server. This ODI Data Server Name must be unique across all ODI data servers in the ODI Repository.
Host Name	Specify the name of the host machine where the file system (source files used for ETL) resides. This is the machine to which you copied the source files in the procedure Section 3.3.11, "Copying Source Files."
Path To File	Specify the directory where you copied the source files in Section 3.3.11, "Copying Source Files." The directory path must include the appropriate source-specific folder for your environment. The source-specific folders are located in /biapps/etl/data_files/src_files. For example, if your source system is Oracle EBS 12.1.1, the directory path would be: <source file home>/biapps/etl/data_files/src_files/EBS_12_1_1
Array Fetch Size	The number of rows requested by ODI on each communication with the data server. Note: This column may be hidden. To view this column, click View, Columns, Show All .
Batch Update Size	The number of rows in a single INSERT command. Note: This column may be hidden. To view this column, click View, Columns, Show All .
JDBC Driver	Oracle recommends that you use the default value. Note: This column may be hidden. To view this column, click View, Columns, Show All .
JDBC URL	Oracle recommends that you use the default value. Note: This column may be hidden. To view this column, click View, Columns, Show All .

d. Click **Save and Close**.

This information is passed to ODI where the connections are created.

Note: The connection details are not propagated to the ODI Repository until you have entered and saved the information on both the Register Source in Configuration Manager page and the Register Source in Oracle Data Integrator Topology page.

4.4 Enabling Offerings for Deployment

Use Oracle BI Applications Configuration Manager to enable the Oracle BI Applications offerings that you have purchased and are deploying. The setup data relating to offerings is made visible in Configuration Manager when you enable the offering.

By default, if you have multiple source instances and you enable an offering, the offering is enabled for all source instances. If an offering will not source from all source instances, then you can disable the source instances from which the offering will not source. For example, suppose you have two source instances, Oracle EBS and PeopleSoft, and you are deploying Financial Analytics. If Financial Analytics will only source from PeopleSoft, then you would disable the Oracle EBS source instance for the Financial Analytics offering.

To enable Oracle BI Applications offerings for deployment:

1. Log in to Oracle BI Applications Configuration Manager as the BI Applications Administrator user.
2. Select the **Manage Business Intelligence Applications** link to display the Manage Business Intelligence Applications dialog.
3. Select the **Business Intelligence Application Offerings** tab.
4. Select the **Enabled** check box next to each offering you want to deploy.

Enabling an offering makes the setup data associated with that offering available in Configuration Manager.

5. Click **Save** to save your changes.
6. To exit this dialog, click **Done**.

To disable a source instance from which an offering will not source:

1. Go to the **Business Intelligence Application Offerings and Associated Sources** tab.
2. Expand the appropriate offering.
3. Deselect the **Enabled** check box for the source you want to disable.
4. Click **Save**.

4.5 Setting Languages for Data Load into the Business Analytics Warehouse

Oracle BI Applications supports data loads in multiple languages. You specify the languages for data loads in Oracle BI Applications Configuration Manager.

To specify Oracle Business Analytics Warehouse languages:

1. Log in to Oracle BI Applications Configuration Manager as a user with the Business Intelligence Applications Administrator duty role.
2. Select the **Manage Warehouse Languages** link to display the Manage Warehouse Languages page.
3. In the Manage Business Analytics Warehouse Languages tab, specify the languages from which data is to be extracted from the list of languages displayed in the table by selecting **Yes** from the Installed drop down.

Note that American English is the default installed language. All other languages are disabled.

Note: When you specify a language as being Installed, the Data Load Parameter LANGUAGE_LIST is populated internally with the list of selected languages. This parameter list is used during data extraction to extract data in the selected languages.

4. Click **Save** to save your changes.

4.6 Running the Domains Load Plan

You must define, generate, and run a domains load plan to load source-specific data into Oracle BI Applications Configuration Manager tables. This enables Configuration Manager to display the appropriate source-specific values as choices in drop-down lists for setup objects.

Note: Before you perform this step you must have completed the procedure [Section 4.3, "Registering Source Systems and Propagating Connection Details to Oracle Data Integrator,"](#) including registering the source in the Register Source in Oracle Data Integrator Topology page, as described in step 5 in the procedure.

To define, generate and run the domains load plan:

1. Define the domains load plan:
 - a. In the Tasks pane of Oracle BI Applications Configuration Manager, select **Manage Load Plans**, which appears under the Load Plans Administration heading.
The Manage Load Plans page is displayed.
 - b. In the Load Plans toolbar, click the **Add** icon.
The Create Load Plan page is displayed.
 - c. On the first page of the Create Load Plan series, specify the following information:

Field	Description
Name	Enter a unique name for the load plan.
Description	(Optional) Enter additional information about the load plan.
Load Plan Type	Select Domain-only Extract and Load (SDE and SIL) .
Source Instances	Select a source instance. If you do not select an instance, then all instances are selected by default.

- d. Click **Next**.
The second page of the Create Load Plan series is displayed.
- e. In the Available Fact Groups tab, select the fact groups you want to include in the domains load plan definition.
Note that fact groups may belong to a hierarchy of fact groups. You can select only the top level parent fact group and not a child fact group.

A load plan must contain at least one fact group. Multiple fact groups may be selected from one or more data sources.

- f. Click **Save**. A submenu is displayed with the following options:

Click **Save** to save the load plan. After a load plan is saved, it is displayed in the Load Plans master list.

Click **Save and Generate Load Plan** to save the load plan and immediately generate it.

Note that the generation process in Oracle BI Applications Configuration Manager propagates the load plan properties to the ODI Repository, where the load plan is built

2. If you did not generate the load plan upon saving in the previous step, then generate it by doing the following:
 - a. In the Load Plans master list, select the domains load plan you defined in step 1.
 - b. In the Load Plans toolbar, click the **Generate** icon.

The Generation Status column indicates the progress of the generation process. The process must complete successfully before you can move on to the next step. Click the **Refresh** icon to refresh the display.
3. Run the domains load plan by selecting it in the master list, and clicking the **Execute** icon on the toolbar.

4.7 Mapping Externally Conformed Domains

After you run the domains load plan, as described in [Section 4.6, "Running the Domains Load Plan,"](#) you must complete the mapping of externally conformed domains to point to a particular source (even if you have only one source), using the Manage Externally Conformed Domains dialog in Oracle BI Applications Configuration Manager. You must perform the mapping configuration for each domain listed in the Manage Externally Conformed Domains dialog.

For instructions on mapping the externally conformed domains, see 'How to Configure Externally Conformed Domains' in *Oracle Business Intelligence Applications Configuration Guide*.

4.8 Granting Users Access to Configuration Manager, FSM and Oracle Data Integrator

Note: On installation the Oracle BI Applications system is configured to use WebLogic Server embedded LDAP for authentication.

Work with your security administrator to grant users access to Oracle BI Applications Configuration Manager, Functional Setup Manager, and Oracle Data Integrator.

Access to Configuration Manager and Functional Setup Manager is controlled through the following duty roles.

- BI Applications Administrator Duty
- BI Applications Functional Developer Duty
- BI Applications Implementation Manager Duty
- Load Plan Operator Duty

- Load Plan Administrator Duty

The security administrator must grant the appropriate duty roles to a user based on the user's job responsibilities. For information on the Configuration Manager and Functional Setup Manager screens that each duty role has access to, see 'Security Overview of Oracle BI Applications Configuration Manager and Functional Setup Manager' in *Oracle Business Intelligence Applications Security Guide*.

The BI Applications administrator, load plan operator, and load plan administrator users will require appropriate access to Oracle Data Integrator. In addition to these users being created in the LDAP system, you must create these users in the ODI Repository and grant them the Supervisor profile or an appropriate ODI profile. The BI Applications administrator must be granted the Supervisor role in Oracle Data Integrator. Work with your security administrator to grant the duty roles.

For more information about managing security in Oracle Data Integrator, see *Oracle Fusion Middleware Developer's Guide for Oracle Data Integrator*.

4.9 Editing Preferred Currency Display Names and Enabling Document Currency

Oracle Business Intelligence is installed with a set of preferred currencies with pre-configured preferred currency names and preferred currency codes. Preferred currency names are used on Oracle Business Intelligence dashboards in the Currency drop-down on the My Account dialog\Preferences tab for a user logged into Oracle Business Intelligence.

You can use the Manage Preferred Currencies dialog to edit the default currency display names. You edit preferred currency name values to change the currency labels that are displayed in all modules associated with BI dashboards. For example, you might want to change the 'Local Currency' label from 'Ledger Currency' to 'Local Currency'.

To edit currency display names:

1. Login to Oracle BI Applications Configuration Manager as the BI Applications Administrator user.
2. Under System Setups, select **Manage Preferred Currencies** to display the Manage Preferred Currencies dialog.
3. Select a currency in the Preferred Currencies list. Selecting the currency displays the associated modules in the bottom table.
4. Click the value in the **Preferred Currency Name** column (or click the Edit icon) to display the Preferred Currency Name dialog.
5. In the Preferred Currency Name field, specify a currency name. This is the name that will appear for end users in the Currency drop-down list, located in Preferences tab of the My Accounts dialog of Oracle Business Intelligence.
6. Click **Save and Close**.

Enabling Document Currency

By default, document currency is excluded from the Currency drop-down list (located in the Preferences tab of the My Accounts dialog in Oracle Business Intelligence). To include Document currency in the Currency drop-down list, you must remove a specific filter from all of the following security groups in the BI metadata repository (RPD):

- OBIA_PROJECT_CURRENCY_PREFERENCES
- OBIA_HCM_CURRENCY_PREFERENCES
- OBIA_SCM_CURRENCY_PREFERENCES
- OBIA_FINANCIAL_CURRENCY_PREFERENCES
- OBIA_MFG_CURRENCY_PREFERENCES
- OBIA_PROCUREMENT_CURRENCY_PREFERENCES
- OBIA_MARKETING_CURRENCY_PREFERENCES
- OBIA_PARTNER_CURRENCY_PREFERENCES
- OBIA_CRM_CURRENCY_PREFERENCES
- OBIA_SALES_CURRENCY_PREFERENCES

Note: The security groups listed above are displayed in Oracle BI Administration Tool on the Application Roles tab on the Identity Manager dialog.

To enable document currencies:

1. In Oracle BI Administration Tool, click **Manage**, then **Identity**, to display the Identity Manager dialog.
2. In the Identity Manager dialog, click **BI Repository**.
3. Display the **Application Roles** tab.
4. For each of the security groups in the RPD list above, do the following:
 - a. Double-click the security group to display the **Application Role - <Name>** dialog.
 - b. Click **Permissions**, and then display the **Data Filters** tab.
 - c. In the **Data Filter** column, remove the following filter:

```
AND "Core"."Fact - Preference List"."Currency Preference Code" <>
'Document Currency'
```

For example, the filter before editing:

```
"Core"."Fact - Preference List"."Module Code" = 'PROJECT_AN' AND
"Core"."Fact - Preference List"."Currency Preference Flag" in ('W',
'B') AND "Core"."Fact - Preference List"."Currency Preference
Code" <> 'Document Currency'
```

For example, the filter after editing:

```
"Core"."Fact - Preference List"."Module Code" = 'PROJECT_AN' AND
"Core"."Fact - Preference List"."Currency Preference Flag" in ('W',
'B')
```

5. Save the changes.

If you edited the metadata repository in Offline mode, then you must use Oracle Fusion Middleware Control to upload the RPD file.

Tip: In Oracle Fusion Middleware Control, use the Upload BI Server Repository area on the Business Intelligence\coreapplication\Deployment\Repository tab. For detailed instructions on how to upload an RPD file, see Section 10.2 'Using Fusion Middleware Control to Upload a Repository and Set the Oracle BI Presentation Catalog Location' in *Oracle Business Intelligence Suite Enterprise Edition System Administrator's Guide*.

4.10 Enabling Initialization Blocks

For all source systems other than Oracle Fusion Applications, you need to enable initialization blocks. Initialization blocks are enabled for Oracle Fusion Applications by default.

Note: This procedure uses forward slashes to separate directories, indicating the UNIX/Linux directory structure. For Windows, substitute a backslash; the directory structure is the same as that for UNIX/Linux.

To enable initialization blocks:

1. Copy the sample config.txt file from
<BI_ORACLE_HOME>/biapps/biarpdutil/bin to
<BI_ORACLE_HOME>/biapps/biarpdutil/lib.
2. Copy the Oracle BI repository file for BI Applications from <BI_ORACLE_HOME>/biapps/admin\provisioning/OracleBIserverComponent to <BI_ORACLE_HOME>/biapps/biarpdutil/lib.
3. Add <BI_ORACLE_HOME>/bifoundation/server/bin to the PATH system variable.
4. Execute the **bi-init** command to display a command prompt that is initialized to your Oracle instance. The bi-init file is located in ORACLE_INSTANCE/bifoundation/OracleBIApplication/coreapplication/setup.
 - For Windows, execute **bi-init.cmd**.
 - For UNIX/Linux, do the following:
 - a. Go to ORACLE_INSTANCE/bifoundation/OracleBIApplication/coreapplication/setup.
 - b. Switch to bash mode.
 - c. Execute **bi-init.sh**.
5. Edit the config.txt file that you copied to BI_ORACLE_HOME>/biapps/biarpdutil/lib, as follows:

```
RPD File Name <RPD file name>
RPD Password <RPD password>
RPD Database List <Comma separated list of database names in RPD physical
layer for which the initialization block has to be enabled>
```

Note: The values in the RPD Database List must include all initialization blocks related to the source system that need to be enabled. "Oracle BI Server" must be included as a value in the RPD Database List if an initialization block that needs to be refreshed from the Oracle BI EE Server is to be enabled.

6. Execute the ManageInitBlock.jar utility, located in <BI_ORACLE_HOME>/biapps/biarpdutil/lib, using the following command:

```
java -classpath ManageInitBlock.jar oracle.apps.biarpdutil.ManageInitBlock
>log.txt
```

An output RPD is generated. The file is named Output_RPD.rpd. All relevant initialization blocks are enabled in Output_RPD.rpd.

7. Deploy the Output_RPD.rpd to Oracle BI EE.

For instructions on deploying an Oracle BI repository, see 'Configuring Repositories' in *Oracle Business Intelligence Suite Enterprise Edition System Administrator's Guide*.

4.11 Trimming the RPD

Oracle BI Applications release 11.1.1.8.1 delivers a full RPD file with projects for all the BI Applications modules. This full RPD is deployed to the BI Server. You can trim the RPD so that it includes only the projects that are relevant to your deployment. Although optional, trimming the RPD makes the BI Server startup process faster and also makes patching quicker.

Note: The RPD should not be trimmed for on-premise Fusion Applications sources. The full RPD is required for ETL in these environments.

The steps for trimming the RPD depend on the status of your deployment:

- If the RPD has not been customized for your deployment: Extract the projects for the products that your organization has purchased. You do not need to perform a merge. See section [Section 4.11.1, "Extracting Projects From Full RPD,"](#) for instructions.
- If the RPD has been customized for your deployment: Extract the applicable projects from the full (delivered) RPD for release 11.1.1.8.1, and, additionally, merge that RPD with your customized release 11.1.1.8.1 RPD. See [Section 4.11.1, "Extracting Projects From Full RPD,"](#) and [Section 4.11.2, "Merging Repositories,"](#) for instructions.

4.11.1 Extracting Projects From Full RPD

Follow this procedure to extract projects from the full RPD. The end result of this process is a trimmed RPD.

To extract from the RPD the projects for the products you have purchased:

1. Open a Command window on the computer where the BI Administration Tool is installed.
2. If you installed Oracle BI EE on Windows, then run `bi-init.cmd` to launch a Command prompt that is initialized to your Oracle instance. This utility is located in:

```
<MiddlewareHome>\instances\instance<n>\bifoundation\OracleBIApplication\coreapplication\setup
```

If you installed the BI Administration Tool using the BI Client installer, then run `bi_init.bat` to launch a Command prompt that is initialized your Oracle instance. This file is located in:

```
<Oracle BI Home>\oraclebi\orahome\bifoundation\server\bin
```

3. In a Command prompt window, run `ExtractProjects`, as described below:
 - If you installed Oracle BI EE on Windows, `ExtractProjects.exe` is located in `<Oracle Home for BI>\bifoundation\server\bin`.
 - If you installed BI Administration Tool using the BI Client installer, `ExtractProjects.exe` is located in `<Oracle BI Home>\oraclebi\orahome\bifoundation\server\bin`.

Run one of the following commands:

For extracting a single project:

```
ExtractProjects -B input_rpd -O output_rpd -I "project_name"
```

For extracting multiple projects:

```
ExtractProjects -B input_rpd -O output_rpd -I "project_name1" -I "project_
name2"-I "project_name3" (and so on)
```

where:

`input_rpd` is the name and path of the full (delivered) release 11.1.1.8.1 RPD and from which you want to extract the project or projects (for example, OracleBIApps.rpd).

`output_rpd` is the name and path of the RPD you want to create with the extracted projects (for example, OracleBIAppsTrimmed.rpd).

`project_name` is the name of the RPD project you want to extract.

You will be prompted to enter the encryption password for the RPD (`input_rpd`).

The list of projects in the 11.1.1.8.1 RPD includes the following:

- Financial Analytics Fusion Edition
- Human Resources Analytics Fusion Edition
- Marketing Analytics Fusion Edition
- Partner Analytics Fusion Edition
- Project Analytics Fusion Edition
- Sales Analytics Fusion Edition
- Supply Chain and Order Management Analytics Fusion Edition
- Student Information Analytics
- Service Analytics
- Price Analytics
- Manufacturing Analytics
- DataLineage_Project

Note: The RPD contains projects in addition to those listed above. These projects are included for future content delivery and upgrade support. To determine the BI Applications available in this release, see "System Requirements and Supported Platforms," for Oracle BI Applications release 11.1.1.8.1 at <http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html>.

4. Save and rename the trimmed RPD. Make sure the name identifies this RPD as one that has been trimmed, for example, OracleBIAppsTrimmed.rpd.

4.11.2 Merging Repositories

Follow this procedure only if you have customized the RPD and are subsequently trimming the RPD.

To merge repositories:

1. In the Oracle BI Administration Tool, open in offline mode the trimmed Oracle BI RPD that you created in the procedure [Section 4.11.1, "Extracting Projects From Full RPD,"](#) for example, OracleBIAppsTrimmed.rpd.
2. On the menu bar, click **File**, and then click **Merge**.
3. In the Select Original Repository dialog box, select the repository **OracleBIApps.rpd**, which is the full RPD.

4. Enter the password for the original repository, and then click **OK**.
5. Click **Select** for the Modified Repository field. The Select Modified Repository dialog box opens.
The Select Modified Repository dialog opens.
6. Select the repository that contains the customizations you made to the RPD file, for example, OracleBIAppsCustom.rpd.
7. Click **Open**, and enter the password for the previously customized RPD file, and then click **OK**.
8. In the Decision drop-down list, select the action you want to take regarding the repository change, or accept the default action.
9. To locate subsequent rows with empty Decision fields, click the Decision header cell. After all rows have a value in the Decision field, the Merge button becomes enabled.
10. Click **Merge**.
A message appears after the merge concludes successfully.
11. On the menu bar, click **File**, and then click **Save As**. Save the current repository using a new name, such as OracleBIAppsFinal.rpd.

4.12 Setting Up Fusion Applications Cloud Data Sources

This section explains how to deploy Oracle BI Applications with a Fusion Applications Cloud data source, and contains the following topics:

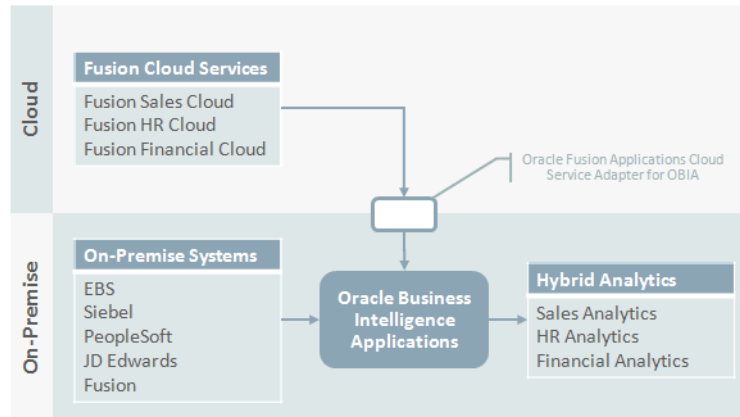
- [Section 4.12.1, "Overview"](#)
- [Section 4.12.2, "Cloud Adaptor Deployment Options"](#)
- [Section 4.12.3, "About the Cloud Adaptor Deployment Process"](#)
- [Section 4.12.4, "Cloud Adaptor Deployment Roadmap"](#)
- [Section 4.12.5, "Create a Service Request to Deploy Fusion Cloud Adaptor"](#)
- [Section 4.12.6, "Provision a User For Export and Import of BI Data"](#)
- [Section 4.12.7, "Register the Fusion Applications Source"](#)
- [Section 4.12.8, "Create FA SDS Schema"](#)
- [Section 4.12.9, "Configure UCM Server in ODI"](#)
- [Section 4.12.10, "Configure Proxy Settings for WebLogic Server"](#)

4.12.1 Overview

The Oracle Fusion Applications Cloud Service Adaptor for Oracle Business Intelligence Applications enables your on-premise deployment of Oracle BI Applications to consume data from your Fusion Cloud Services, providing you with a comprehensive set of analytics that span your on-premise and cloud service systems to give you a complete view of your business.

The Oracle Fusion Applications Cloud Service Adaptor for Oracle Business Intelligence Applications extends the capability of your Oracle Business Intelligence Applications deployment to consume data from your Fusion Cloud Service subscriptions. Along with the many supported on-premise source business systems,

support for Fusion Application Cloud Services enables a robust hybrid analytics solution to deliver the complete picture regardless of where the data originates.



Oracle Fusion Applications Cloud Service Adaptor for Oracle Business Intelligence Applications provides a seamless hybrid analytics solution to provide the complete picture for your enterprise analytics.

The Oracle Fusion Applications Cloud Service Adaptor for Oracle Business Intelligence Applications securely connects your on-premise Oracle BI Applications deployment to your Oracle Fusion Applications Cloud Service and automates the flow of data from your source system to your Oracle Business Analytics Warehouse, enabling your hybrid analytics solution.

Cloud Adaptor key features include:

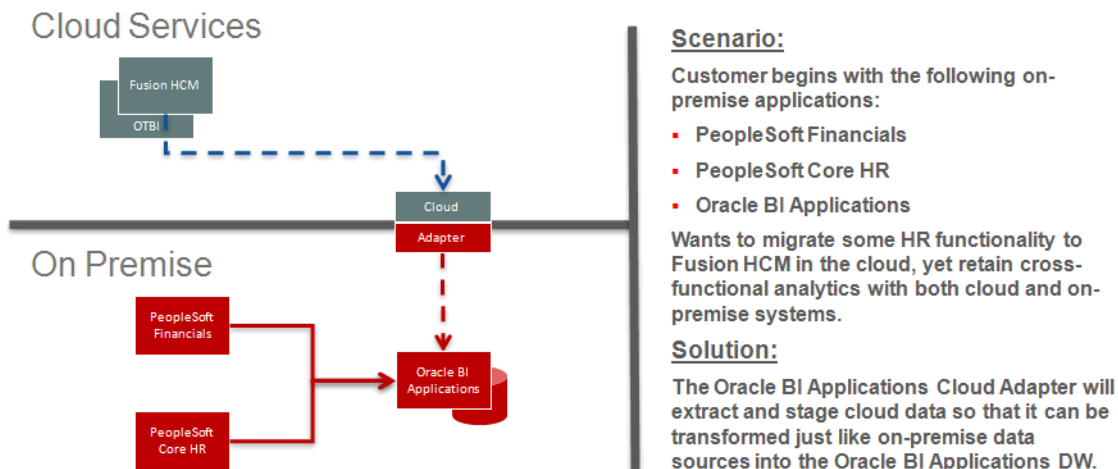
- Extracts are from VOs and not direct from DB.
- Leverages Standard Security Methods of Source Cloud Systems to secure data in-transit.

4.12.2 Cloud Adaptor Deployment Options

Hybrid Data Sources Category

Deployment Option: Hybrid Data Sources

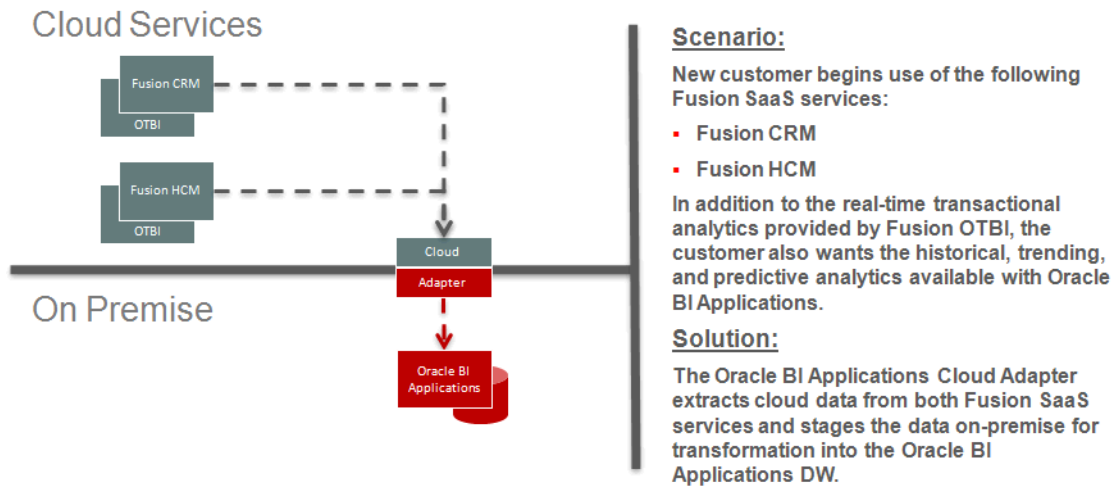
Fusion SaaS & On-Premise PeopleSoft, Oracle BI Applications



Cloud-Only Data Sources

Deployment Option: Cloud-Only Data Sources

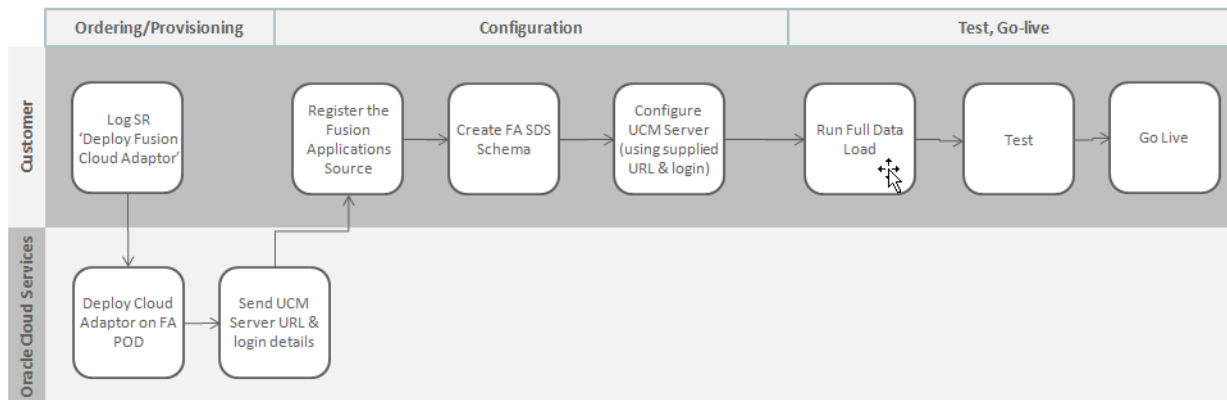
Fusion SaaS & On-Premise Oracle BI Applications



4.12.3 About the Cloud Adaptor Deployment Process

The diagram below shows the tasks and process handshakes required to deploy a Fusion Applications Cloud data source using Cloud Adaptor.

Cloud Adapter Deployment: Overview



4.12.4 Cloud Adaptor Deployment Roadmap

Pre-requisites

- Oracle BI Applications 11.1.1.8.1, plus latest Patch Bundles
- Oracle Cloud Applications Release 8, Patch Bundle 10 or later

To deploy a Fusion Applications Cloud Data Source, do the following:

1. Create a Service Request to Deploy Fusion Cloud Adaptor by following the steps in Section 4.12.5, "Create a Service Request to Deploy Fusion Cloud Adaptor".
2. Provision a new or existing Fusion Applications user with export and import privileges using the Application Role name 'Upload and Download Business

- Intelligence Data', by following the steps in [Section 4.12.6, "Provision a User For Export and Import of BI Data"](#).
3. Register the Fusion Applications Source by following the steps in [Section 4.12.7, "Register the Fusion Applications Source"](#).
 4. Create FA SDS Schema by following the steps in [Section 4.12.8, "Create FA SDS Schema"](#).
 5. Configure UCM Server in ODI by following the steps in [Section 4.12.9, "Configure UCM Server in ODI"](#).
 6. Configure proxy settings for WebLogic Server by following the steps in [Section 4.12.10, "Configure Proxy Settings for WebLogic Server"](#).
If you have already configured WebLogic Server to allow any external connection, then you can skip this step.
 7. If you are deploying Key Flex Fields for Financials, then before you execute this Load Plan you must follow the steps in [Chapter 5, "Setting Up Key Flex Fields for Financials Cloud Adaptor"](#).

4.12.5 Create a Service Request to Deploy Fusion Cloud Adaptor

These steps form high-level Step 1 in [Section 4.12.4, "Cloud Adaptor Deployment Roadmap"](#).

Log into My Oracle Support (support.oracle.com) and create the following Service Request.

Action	Problem Type	Inputs
Deploy Fusion Cloud Adaptor	Specify the following: Problem Type: Hosting Services – Application Sub-Problem Type: Deploy Fusion Cloud Adaptor User ID: <User ID for OBIAExport role> FA POD details: <POD ID> FA POD: <Stage OR Production>	This SR initiates the process for Oracle Hosting Operations to deploy the Cloud Adaptor to enable data extraction. Please include the following information in the SR: 1. Provide the Fusion Applications POD details. This must include the POD identifier (the URL used to access the Fusion environment). 2. Indicate whether the FA POD is Stage or Production.

When the SR is resolved, Oracle Cloud Services provides you with a UCM Server URL and a set of login credentials.

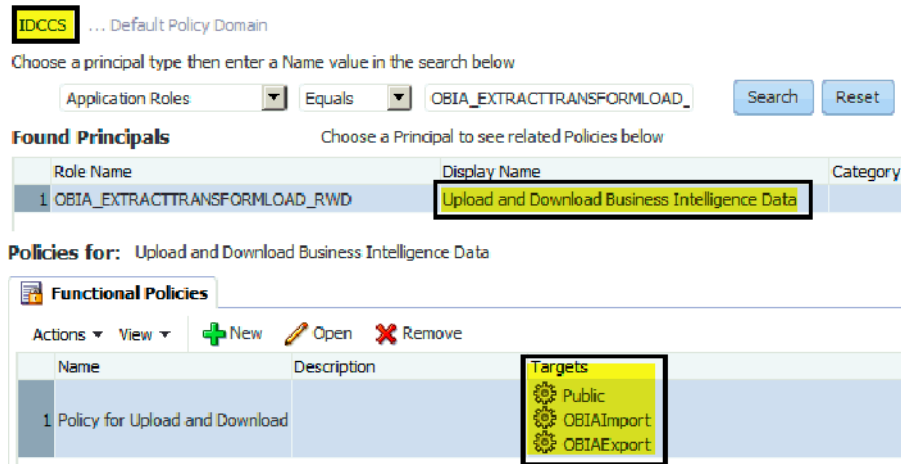
4.12.6 Provision a User For Export and Import of BI Data

These steps form high-level Step 2 in [Section 4.12.4, "Cloud Adaptor Deployment Roadmap"](#).

Provision a new or existing user in Fusion Applications with privileges to download data from Fusion UCM:

1. Create a new user, or use an existing user in Fusion Applications, that has privileges to download data from Fusion UCM.
2. Assign the Application Role 'Upload and Download Business Intelligence Data' to an Enterprise role to which the user is already assigned.

The screen shot below shows an example of how to apply the Application Role Name OBIA_EXTRACTTRANSFORMLOAD_RWD (Display Name 'Upload and Download Business Intelligence Data') to an Enterprise Role.



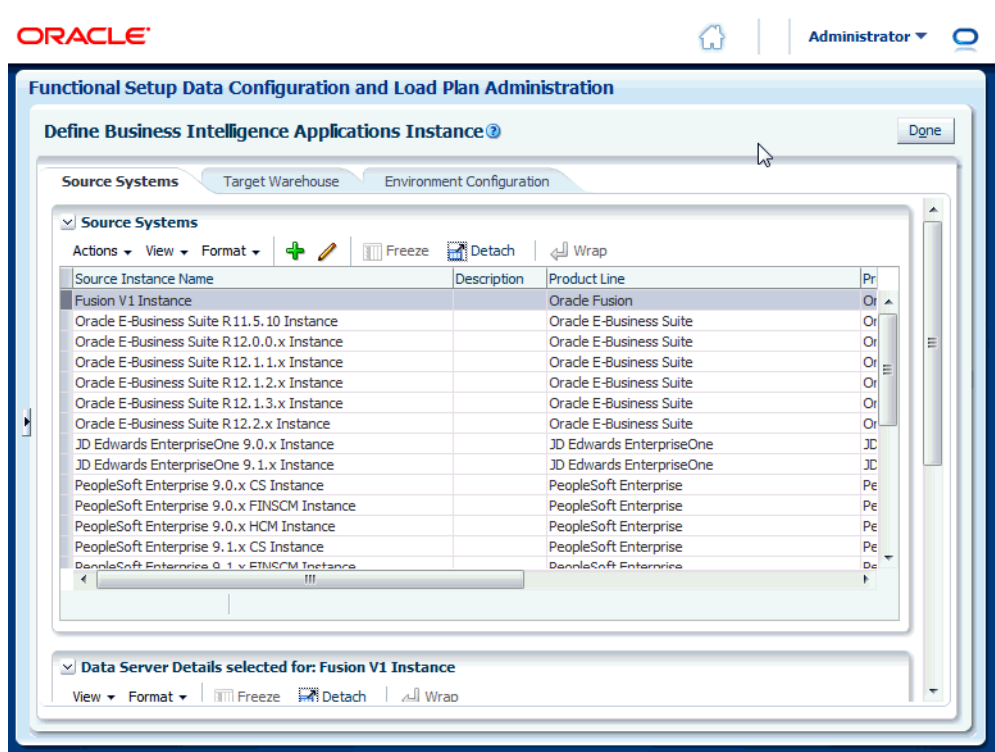
4.12.7 Register the Fusion Applications Source

These steps form high-level Step 3 in Section 4.12.4, "Cloud Adaptor Deployment Roadmap".

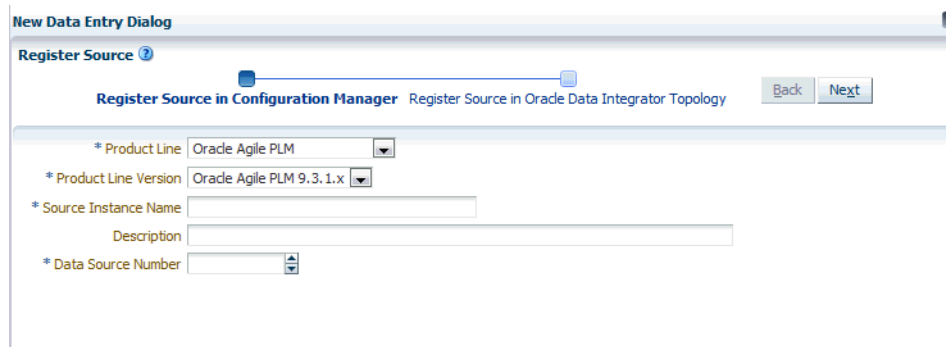
Register the Fusion Applications Source

Login to BI Applications Configuration Manager as a user that has Enterprise Role '-ASM_APPLICATION_IMPLEMENTATION_ADMIN_ABSTRACT'.

1. In the Tasks pane under System Setups, select the **Define Business Intelligence Applications Instance** link to display the Source Systems tab.



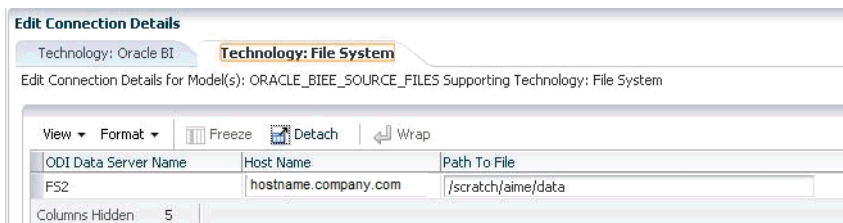
- Click the **Add** icon (+) to display the Register Source dialog.



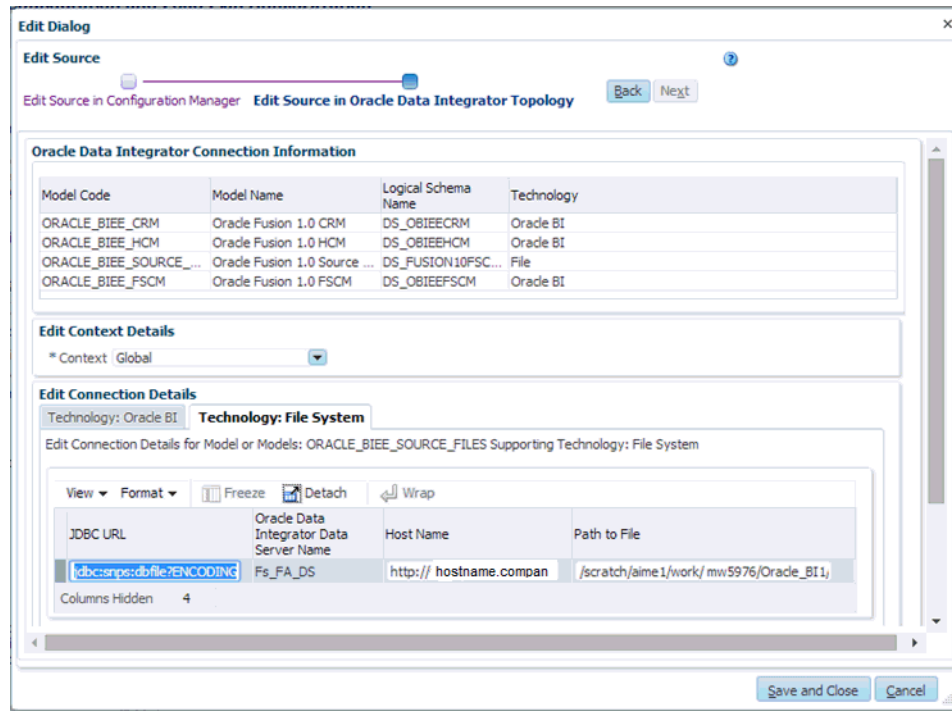
- In the 'Register Source in Configuration Manager' page, specify:
 - In the **Product Line** drop down list, select Oracle Fusion.
 - In the **Product Line Version**, select the Oracle Fusion version being used.
 - In the **Source Instance Name** field, specify a unique name to identify the source system.
 - In the **Data Source Number** field, specify 200.
- Click **Next** to display the 'Edit Source in Oracle Data Integrator Topology' page.
- Choose the context as Global from the dropdown and specify an ODI data server, jdbc details and host details of BI server.

Note: Enter dummy values as these are not needed for Cloud Adaptor based ETL.
- Display the File Technology tab and provide details for ETL Source Files.

The default Source File Connection location is <MW_HOME>/Oracle_BI1/biapps/etl/data_files/src_files/FUSION_1_0.



- Add JDBC URL column from the 'View' menu and change the JDBC URL value from 'jdbc:snps:dbfile?OPT=TRUE' to 'jdbc:snps:dbfile?ENCODING=UTF-8&OPT=TRUE' to File connection.

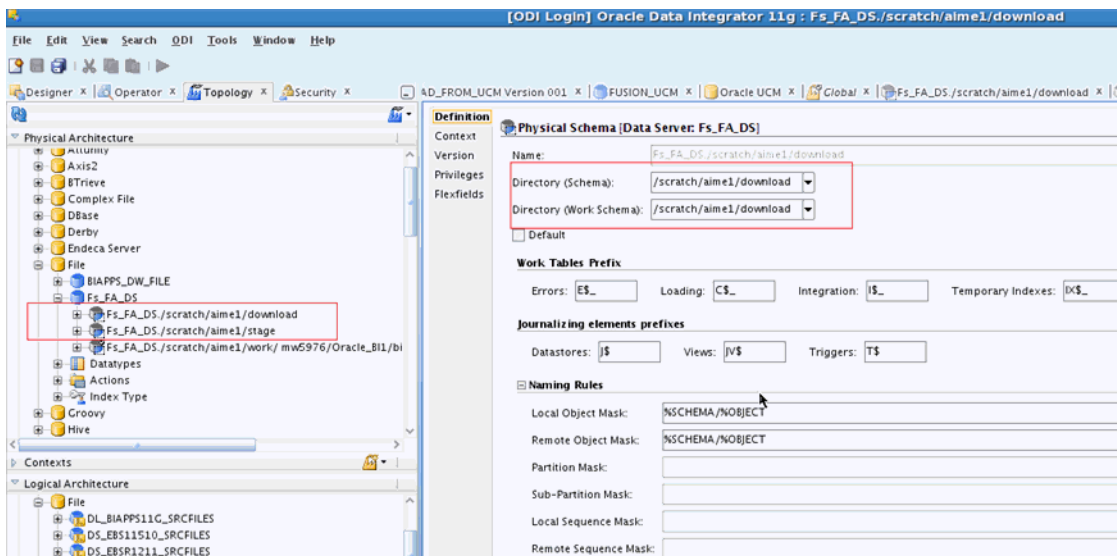


8. Save the details.

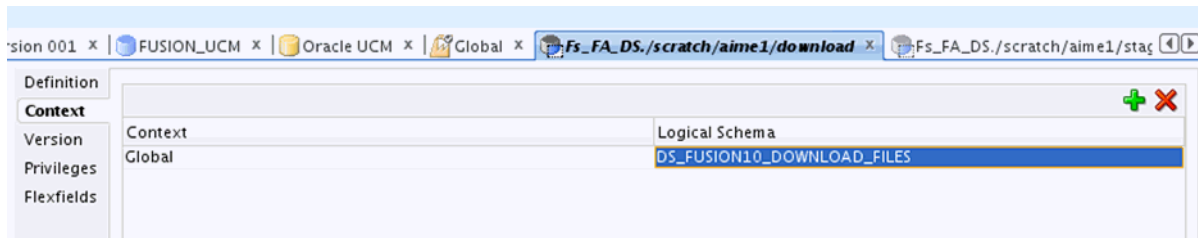
Register file system location for download and staging the files from FA UCM server in ODI studio

While registering Fusion Data Source in BIACM, an ODI data server is created for File technology (see example screen shot FS_FA_DS in Step 1 below). Create two new physical schemas in ODI Topology under the existing data server, as follows:

1. In ODI Studio, create the physical schema for download, upload, and enter the folder location in the Definition tab.

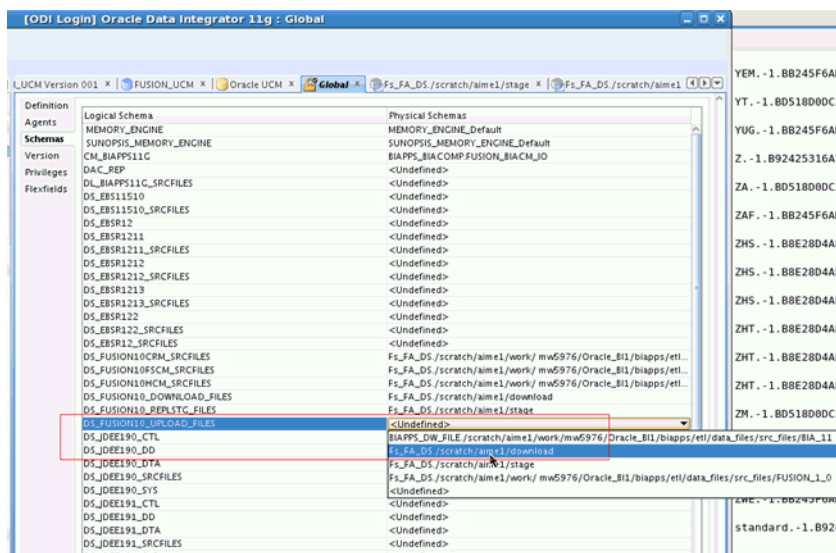


Map to 'DS_FUSION10_DOWNLOAD_FILES' in 'Global' Context in the Context tab. (add using '+' icon on right).

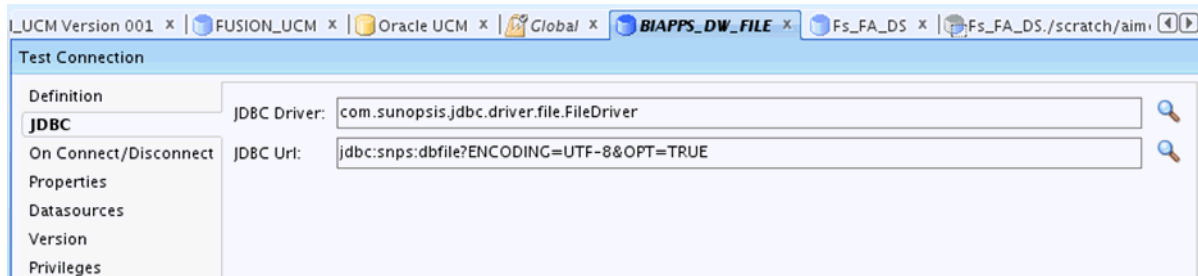


2. Create Physical schema for staging and map to logical schema 'DS_FUSION10_REPLSTG_FILES'. Refer to the screen shot below for download physical schema.
3. Open 'Global' context and map the logical schema 'DS_FUSION10_UPLOAD_FILES' to newly created physical schema for download.

Note: These folders should will be used by ODI Agent to download files and should be accessible to the ODI_server1.



4. Add 'jdbc:snps:dbfile?ENCODING=UTF-8&OPT=TRUE' to all File connection 'BIAPPS_DW_FILE' in Physical architecture.



5. Update logical schema for 'DS_FUSION10_CRMSRCFILES', 'DS_FUSION10_HCMSRCFILES', 'DS_FUSION10_DOWNLOAD_FILES', 'DS_FUSION10_REPLSTG_FILES' and 'DS_FUSION10_UPLOAD_FILES' to 200.

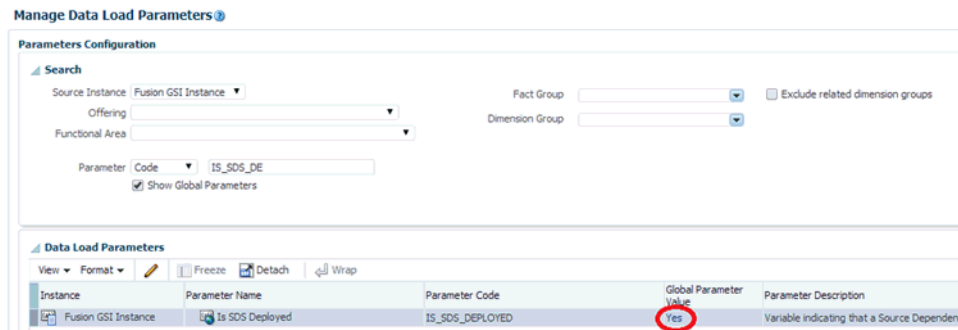
Verify that the IS_SDS_DEPLOYED variable is set to true for FUSION.

1. In the Tasks pane, select the **Manage Data Load Parameters** link to display the Manage Data Load Parameters dialog.

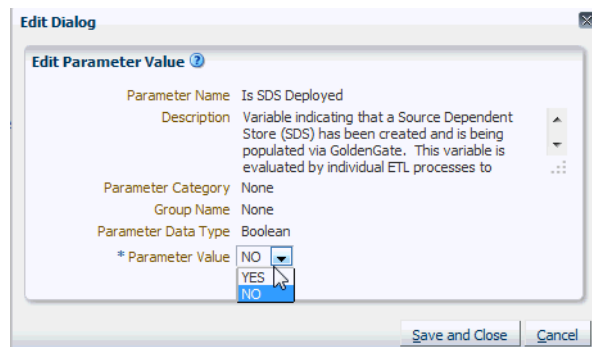
2. Use the Search area to locate the IS_SDS_DEPLOYED parameter for the Fusion source, as follows:
 - a. In the Source Instance drop down, select the Fusion source that you have created.
 - b. In the Parameter Code field, specify 'IS_SDS_DEPLOYED'.
 - c. Click Search.

The IS_SDS_DEPLOYED parameter is displayed in the Data Load Parameters list.

In the Data Load Parameters list, view the parameter returned by the search, and verify that the value is 'Yes'.

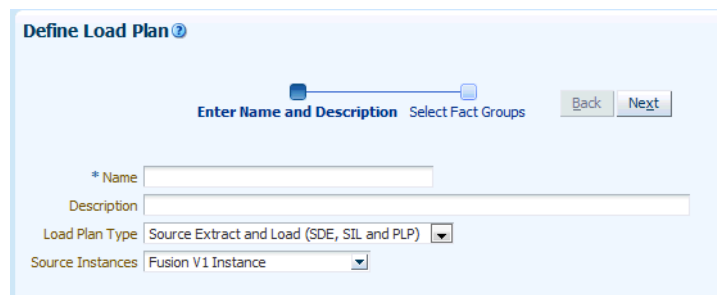


3. If the value is not Yes, then click Edit, and in the Parameter Value drop down list, select 'YES', and save the details.

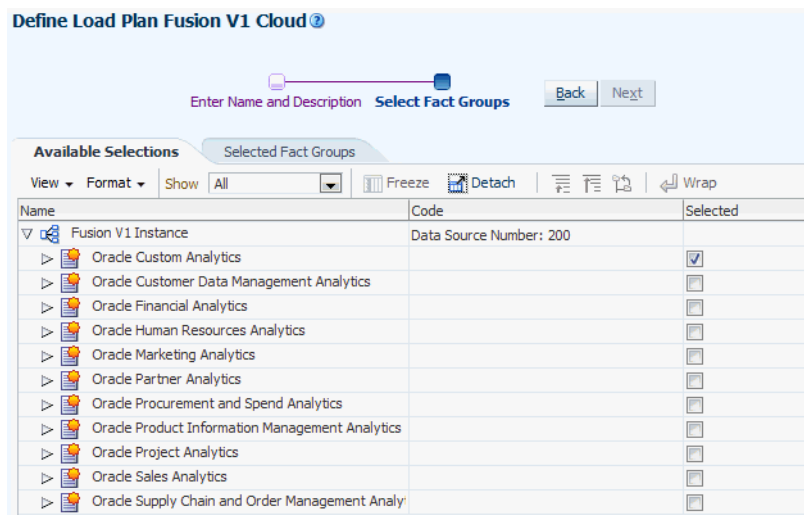


Create a Load Plan and Specify Offerings and Fact Groups to Load

1. In the Tasks pane, click **Manage Load Plans** to display the Load Plans dialog.
2. Click **Add (+)** to display the Define Load Plan dialog.



3. Use the **Name** field to specify a unique name, and in the **Source Instances** drop down list select the Fusion source, then click Next to display the Select Fact Groups page.
4. Select applicable offerings and fact groups.



5. Click **Save**.
6. In the list of Load Plans, select the new load plan, and click **Generate**.

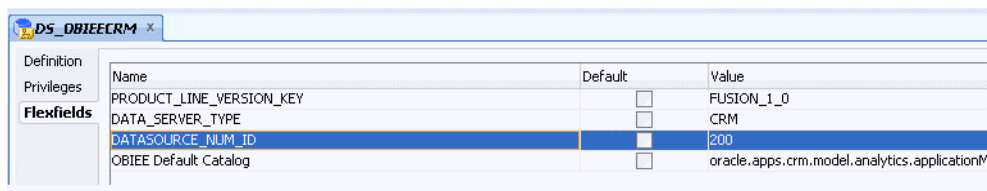
4.12.8 Create FA SDS Schema

These steps form high-level Step 4 in [Section 4.12.4, "Cloud Adaptor Deployment Roadmap"](#).

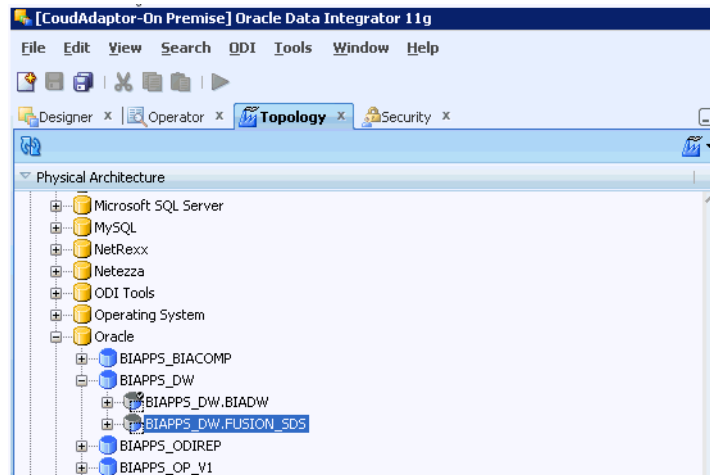
Follow this procedure to create the SDS schema.

To create the SDS schema:

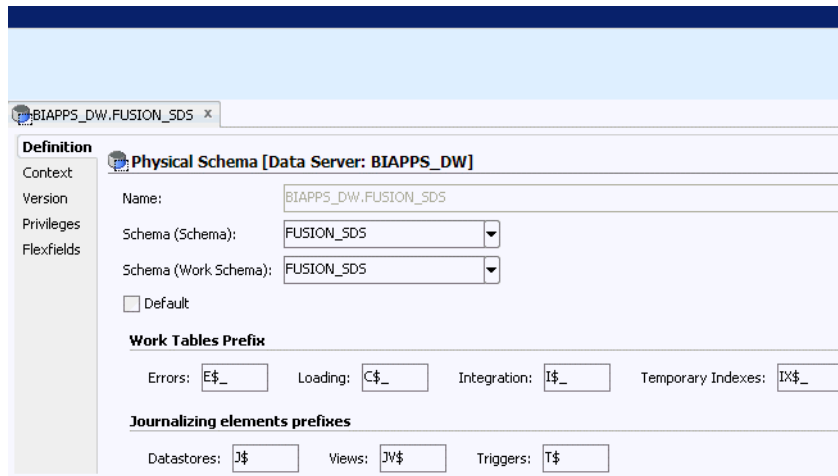
1. Log into the Business Analytics Warehouse database as SYS.
2. Create a new user for the SDS schema.
3. Grant DBA privileges to the new SDS schema user and to DW_SCHEMA.
4. Log into ODI Studio.
5. Confirm the DSN value for the logical schema, as follows.
 - a. Display the Topology tab, and navigate to the Physical Architecture tab.
 - b. Edit the Logical Schemas DS_OBIEECRM, DS_OBIEEHCM, and DS_OBIEEFSCM).
 - c. On the Flexfields tab for each Logical Schema, make sure that the DATASOURCE_NUM_ID value is 200.



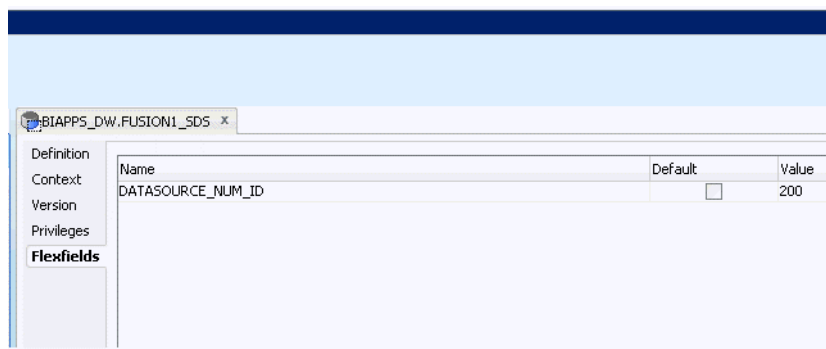
6. Create the SDS physical schema and define the Flexfields value for DATASOURCE_NUM_ID as 200.
 - a. Display the Topology tab, and navigate to the Physical Architecture tab, and expand the Oracle\BIAPPS_DW node.



- b. Create an SDS Physical Schema named BIAPPS_DW.FUSION_SDS.
 - c. On the Definition tab, set the Schema and Work Schema drop down list values to FUSION_SDS.

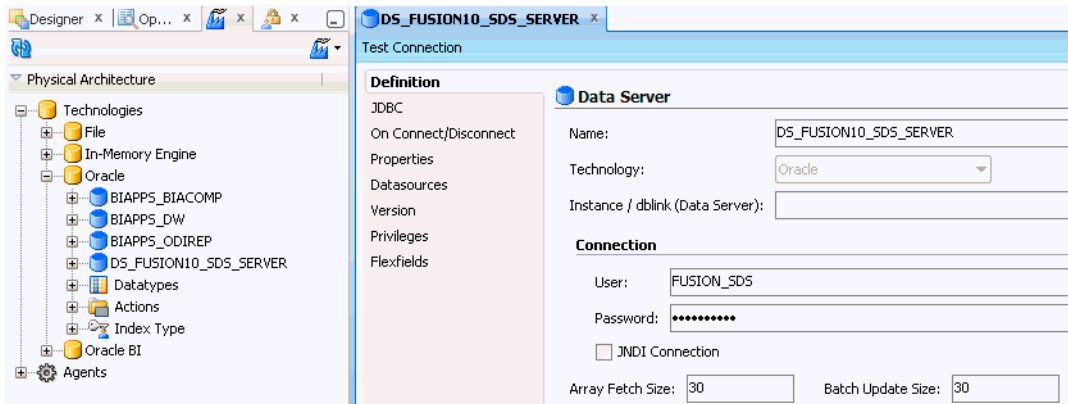


- d. On the Flexfields tab, set the DATASOURCE_NUM_ID to 200.

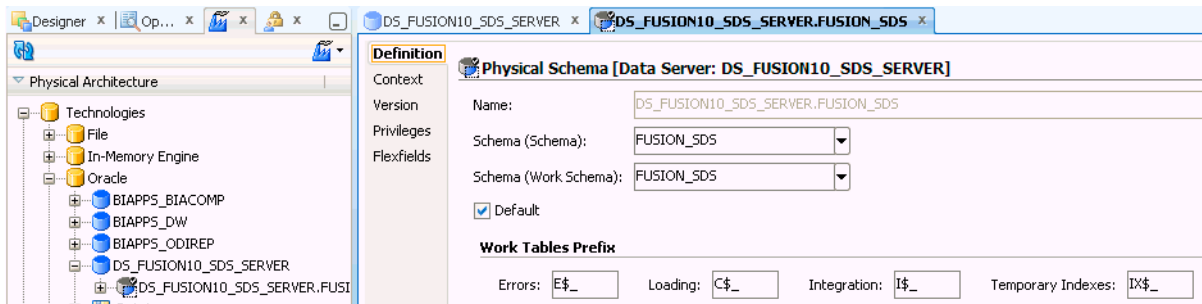


7. Create a new data server under Oracle technology to configure/register SDS Physical schema details to be used with SDS DDL procedure and SDS FTS maps, as shown in the three example screen shots below.

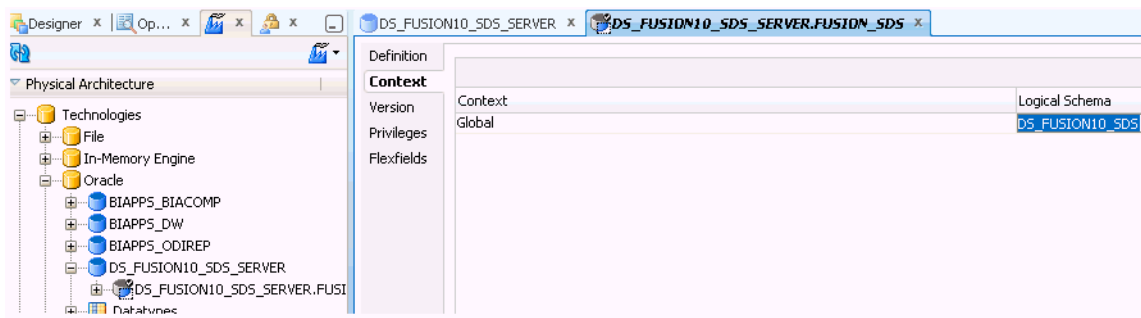
The screen shot below shows the Definition configuration settings for DS_FUSION10_SDS_SERVER.



The screen shot below shows the Definition configuration settings for DS_FUSION10_SDS_SERVER.FUSION_SDS.



The screen shot below shows the Context configuration settings for DS_FUSION10_SDS_SERVER.FUSION_SDS.



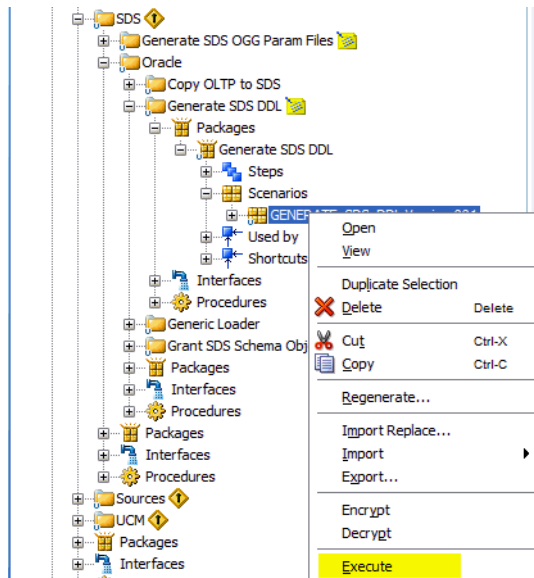
8. Create the Data Server (DS_FUSION10_SDS_SERVER) and Physical schema (FUSION_SDS) under that Data Server, as follows:

Note: On the Variable values dialog, for each scenario, specify the following values:

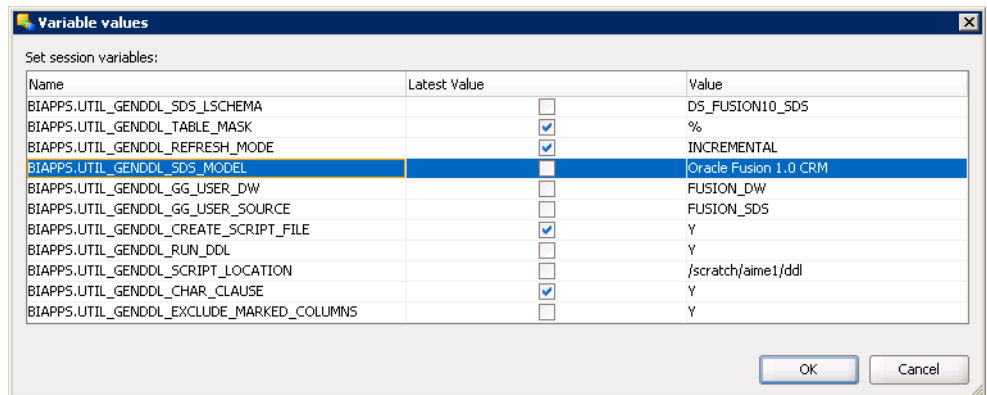
- BIAPPS.UTIL_GENDDL_EXCLUDE_MARKED_COLUMNS = Y
- BIAPPS.UTIL_GENDDL_SDS_LSCHEMA = DS_FUSION10_SDS.

- BIAPPS.UTIL_GENDDL_GG_USER_DW = FUSION_DW
- BIAPPS.UTIL_GENDDL_GG_USER_DW = FUSION_SDS

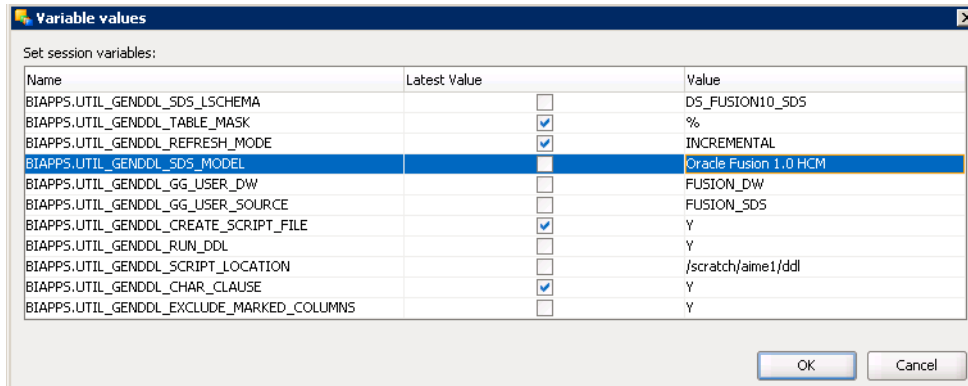
Then execute the GENERATE_SDS_DDL scenario that is located in Components\SDS\Oracle\Generate SDS DLL\Scenarios:



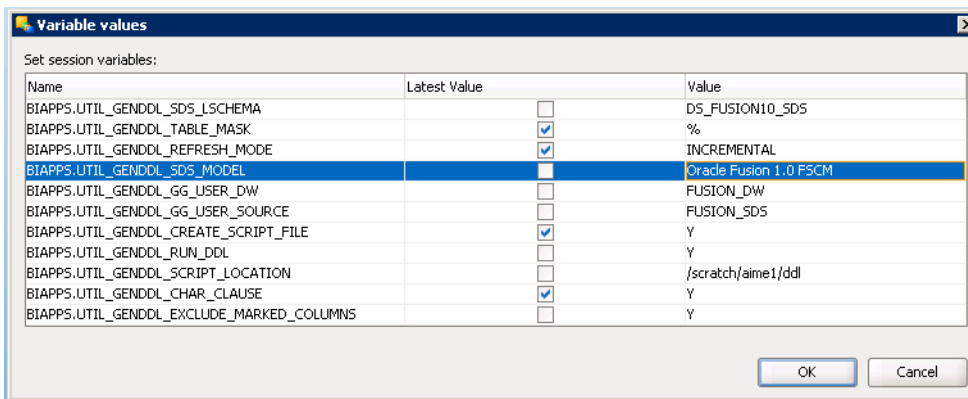
- a. Set the SDS_MODEL value to point to 'Oracle Fusion 1.0 CRM', and execute the GENERATE_SDS_DDL scenario.



- b. Set the SDS_MODEL value to point to 'Oracle Fusion 1.0 HCM', and execute the GENERATE_SDS_DDL scenario.



- c. Set the SDS_MODEL value to point to 'Oracle Fusion 1.0 FSCM', and execute the GENERATE_SDS_DDL scenario.

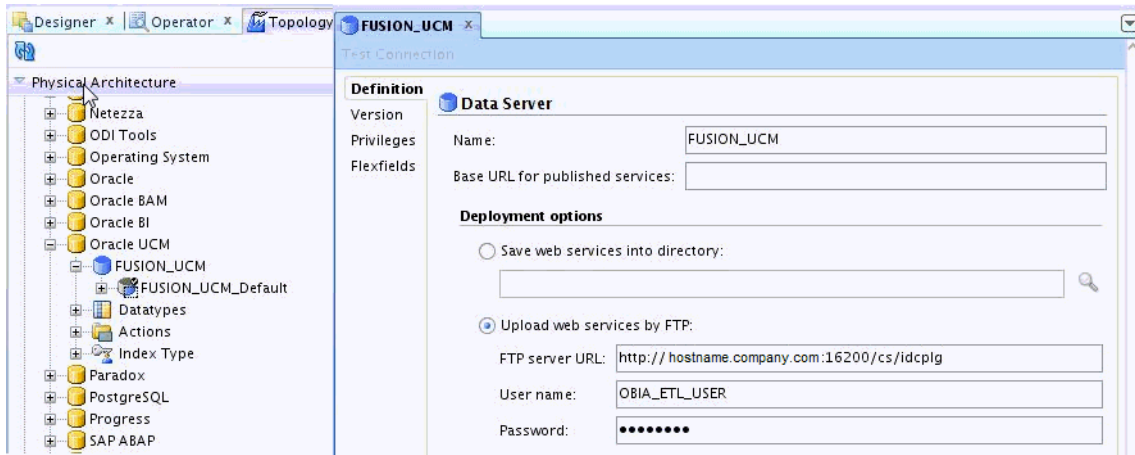


4.12.9 Configure UCM Server in ODI

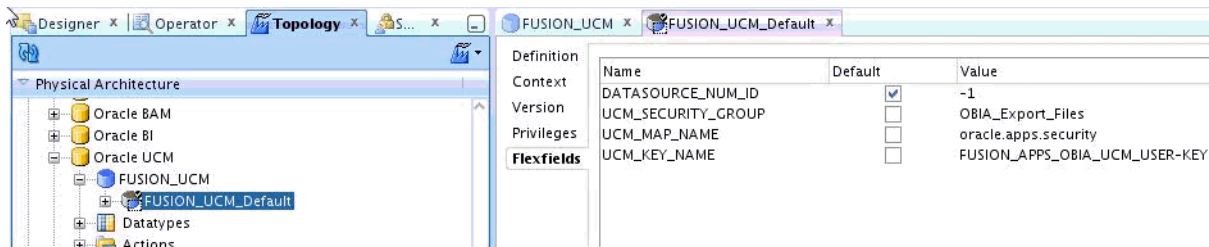
These steps form high-level Step 5 in Section 4.12.4, "Cloud Adaptor Deployment Roadmap".

When the SR that you logged in Step 2 is resolved, Oracle Cloud Services provides you with a UCM Server URL and a set of login credentials.

1. Configure the UCM server URL in ODI Topology:
 - a. In ODI Studio, navigate to the Topology tab, and in the Physical Architecture pane, create a data server named 'Fusion_UCM' on the Oracle UCM node.
Use the **Upload Web Services by FTP** fields to specify the Fusion UCM Server URL and login credentials for the user that you provisioned in step 1 Section 4.12.6, "Provision a User For Export and Import of BI Data".

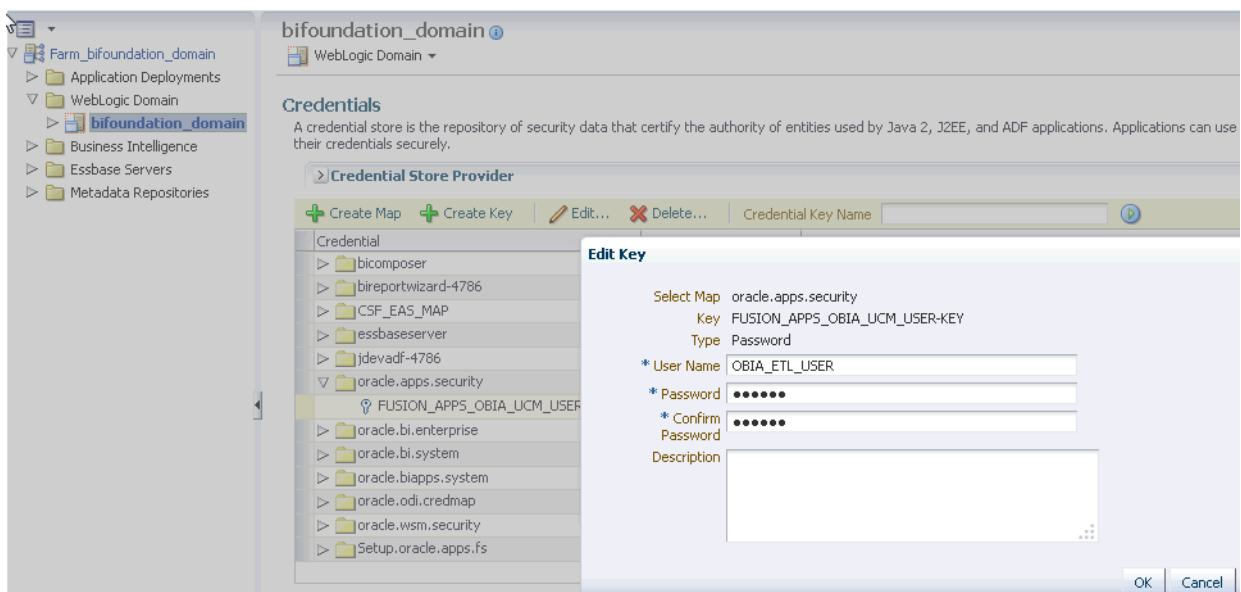


- b. Create the physical schema: FUSION_UCM_Default under FUSION_UCM.
- c. For the FUSION_UCM schema, use the FTP Server URL field on the Definition tab to specify the UCM Server URL supplied to you by Oracle Cloud Services.
- d. Use the Flexfields tab to specify the Map/Key pair.



Whatever Map/Key pair you specify here, make sure that the same pair exist in the EM url of this host (ODI).

Note: Use the user name and password that you specified in Step 1a for the Upload Web Services by FTP fields.



2. Configure DS_FUSION10_DOWNLOAD_FILES to the newly created physical schema.
3. On the Operator tab, open the generated Load Plan and execute it.

It will first copy files from UCM server to 'down' folder, then will move them to 'cloudFiles' folder. After that it will run FTS mappings to populate SDS schema where csv files act as source. Then it will run warehouse mappings that will populate the DW schema, and where the SDS schema acts as a source.

Note: If you are deploying Key Flex Fields for Financials, then before you execute this Load Plan you must follow the steps in [Chapter 5, "Setting Up Key Flex Fields for Financials Cloud Adaptor"](#).

4. Configure the user name and password in credential store in BI Domain.

In Enterprise Manager, create a credential key 'FUSION_APPS_OBIA_UCM_USER-KEY' with the username/password under map 'oracle.apps.security'.

Note: username/password is the user that has security group 'OBIAExport' assigned in FA SAAs environment.

5. If HTTPS is enabled for the UCM Server, configure SSL.

Certificates on FA Saas PODs are CA signed, so there is no need to import the certificates as long as DemoTrust.jks is defined as the trust store in weblogic.

Add the following JAVA OPTION in setDomainEnv.sh:

```
Dweblogic.security.SSL.trustedCAkeystore=${WL_HOME}/server/lib/DemoTrust.jks
```

4.12.10 Configure Proxy Settings for WebLogic Server

These steps form high-level Step 6 in [Section 4.12.4, "Cloud Adaptor Deployment Roadmap"](#).

To use external Web Services or HTTP data sources when Oracle BI Applications is configured behind a firewall or requires a proxy to access the internet, you must configure Oracle WebLogic Server to allow the Web service requests and to be aware of the proxy. Define the proxy host and the non-proxy hosts to WebLogic ODI managed server (ODI_server1) by setting the following parameters:

- -Dhttp.proxyHost - specifies the proxy host. For example:
-Dhttp.proxyHost=www-proxy.example.com
- -Dhttp.proxyPort - specifies the proxy host port. For example:
-Dhttp.proxyPort=80
- -Dhttp.nonProxyHosts - specifies the hosts to connect to directly, not through the proxy. Specify the list of hosts, each separated by a "|" character; a wildcard character (*) can be used for matching. For example:
-Dhttp.nonProxyHosts="localhost|*.example1.com|*.example2.com"

To set these proxy parameters and the Web service configuration for your WebLogic Server, update the WebLogic setDomainEnv script as follows:

1. Open the setDomainEnv script (.sh or .bat) in the MW_HOME/user_projects/domains/DOMAIN_NAME/bin/ directory.

2. Enter the following parameters:

```
EXTRA_JAVA_PROPERTIES="-Dhttp.proxyHost=www-proxy.example.com
-Dhttp.proxyPort=80
-Dhttp.nonProxyHosts=localhost|*.mycompany.com|*.mycorporation.com|*.otherhost
.com ${EXTRA_JAVA_PROPERTIES}"
export EXTRA_JAVA_PROPERTIES
```

```
EXTRA_JAVA_
PROPERTIES="-Djavax.xml.soap.MessageFactory=oracle.j2ee.ws.saaj.soap.MessageFa
ctoryImpl
-Djavax.xml.soap.SOAPFactory=oracle.j2ee.ws.saaj.SOAPFactoryImpl
-Djavax.xml.soap.SOAPConnectionFactory=oracle.j2ee.ws.saaj.client.p2p.HttpSOAP
ConnectionFactory ${EXTRA_JAVA_PROPERTIES}"
export EXTRA_JAVA_PROPERTIES
```

where:

www-proxy.example.com is an example proxy host.

80 is the example proxy port.

localhost|*.mycompany.com|*.mycorporation.com|*.otherhost.com are example non-proxy hosts.

4.13 Next Steps

After you complete the setup tasks described above, Oracle BI Applications is ready for functional configuration, which is accomplished using Oracle BI Applications Configuration Manager and Functional Setup Manager. To enable functional configuration, you must provide the Oracle BI Applications Configuration Manager URL to your implementation managers and functional developers. To learn about the functional configuration process for Oracle BI Applications, see *Oracle Business Intelligence Applications Configuration Guide*.

In addition, for Oracle Fusion Applications sources, after Oracle BI Applications analyses and dashboards have been tested and the data validated, the Oracle BI Applications system administrator will need to inform the Fusion Applications Administrator to enable the appropriate embedded analyses and dashboard (ADR) regions in Fusion Applications. The ADR regions are enabled using Functional Setup Manager for Fusion Applications.

Setting Up Key Flex Fields for Financials Cloud Adaptor

This section explains how to load the financial KFF data for GL#, CAT# and LOC# KFFs into Oracle Business Analytics Warehouse.

Note: In order to source data from Oracle Fusion Applications using the Cloud Adaptor, you must have applied Patch Bundle 3.

Note: These instructions only apply if you are deploying a Fusion Applications cloud data source.

To set up Key Flex Fields, do the following:

1. Enable and setup the VOs for extraction in Oracle BI Applications Configuration Manager, as specified in [Section 5.1, "Using Oracle BI Applications Configuration Manager to Configure Cloud Extract"](#).
2. Configure the ODI repository in Oracle Data Integrator, as specified in [Section 5.2, "Using ODI to Set Up Key Flex Fields"](#).
3. If you are deploying Fusion Financials, then perform the additional configuration steps in [Section 5.3, "Additional Steps for Fusion Financials Implementations"](#).

5.1 Using Oracle BI Applications Configuration Manager to Configure Cloud Extract

When you have completed the KFF setup in Fusion and deployed the Flexfield, VOs are generated for each segment that you have enabled for BI. Each VO must be seeded and enabled for BI extraction so that it can be loaded into Oracle Business Analytics Warehouse.

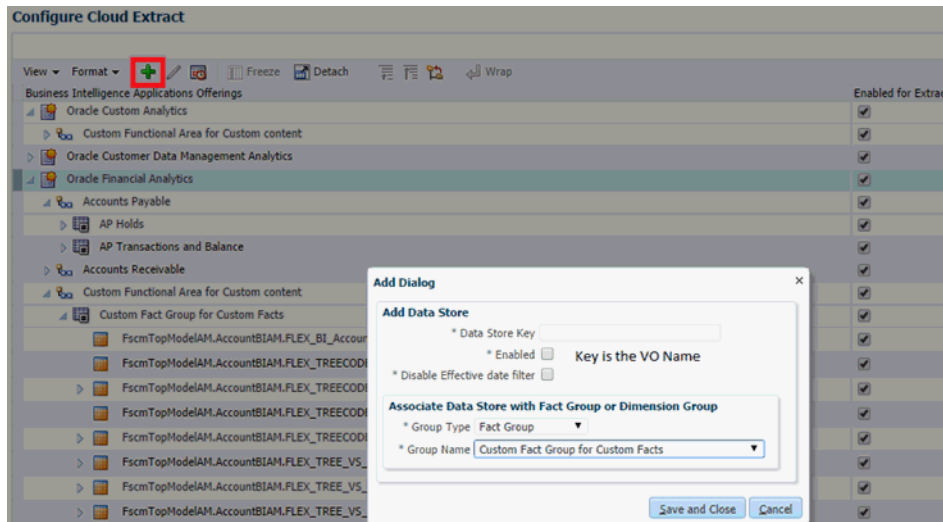
To seed an enable VOs for extraction, follow these steps:

1. In Oracle BI Applications Configuration Manager, navigate to Configure Cloud Extract, and add the VOs mentioned in step 3 and enable them for BI extraction.

You must add VOs under the 'Custom Fact Group for Custom Facts' under 'Custom Functional Area for Custom Content' under the Oracle Financial Analytics Offering, as shown in the example screen shots below.

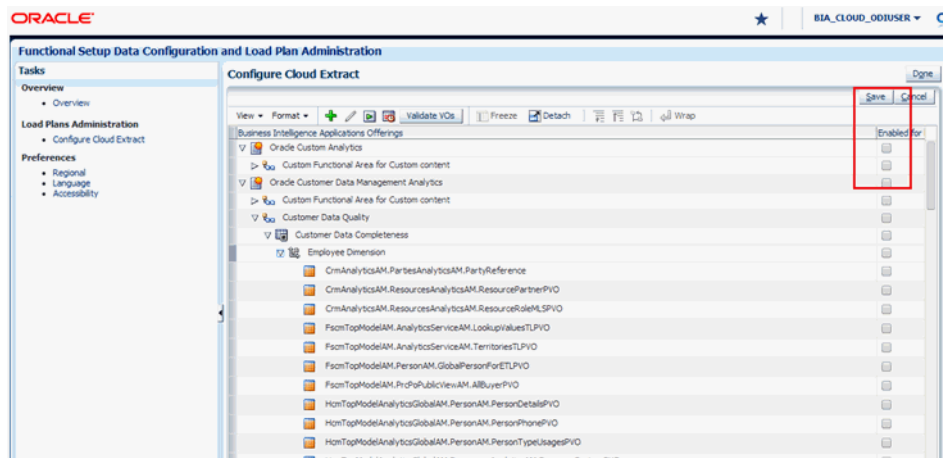
Note: VO names are case sensitive.

2. Click Add to display the Add Data Store dialog, specify the details, then click Save and Close.



3. To enable VOs for extraction, select the parent Offering, Functional Area, FG/DG, or individual VO.

For example, the screenshot below shows the parent Oracle Custom Analytics.



4. The following VOs must be added and enabled for extraction:
 - For the GL# KFF, you must add the BI Flattened VO along with the segment VOs generated for the segment labels mapped to BI Objects in your Fusion setup.
The BI Flattened VO name for GL# that needs to be added is `FscmTopModelAM.AccountBIAM.FLEX_BI_Account_VI`.
 - The VOs generated for segment labels FA_COST_CTR (mapped to Dim – Cost Center), GL_ACCOUNT (mapped to Dim – Natural Account Segment), and GL_BALANCING (mapped to Dim – Balancing Segment) are known prior. You must add the following VOs:

```
FscmTopModelAM.AccountBIAM.FLEX_TREE_VS_FA_COST_CTR_VI
FscmTopModelAM.AccountBIAM.FLEX_TREECODE_VS_FA_COST_CTR_VI
FscmTopModelAM.AccountBIAM.FLEX_TREE_VS_GL_BALANCING_VI
FscmTopModelAM.AccountBIAM.FLEX_TREECODE_VS_GL_BALANCING_VI
FscmTopModelAM.AccountBIAM.FLEX_TREE_VS_GL_ACCOUNT_VI
FscmTopModelAM.AccountBIAM.FLEX_TREECODE_VS_GL_ACCOUNT_VI
```

Note: When you add the TREECODE VOs listed above, you must enable the 'Disable Effective date filter' option.

- The VOs generated for any segment label apart from the 3 mentioned in the previous point and mapped to the BI Object Dim – GL Segmentx are not known before hand as the VO names depends on the segment label. Therefore, you must add the VO names based on the naming pattern given below.

If the segment is a tree segment (if you have created hierarchies for value sets used for those segments), then the VOs are named as follows:

- FscmTopModelAM.AccountBIAM.FLEX_TREE_VS_<segment label>_VI
- FscmTopModelAM.AccountBIAM.FLEX_TREECODE_VS_<segment label>_VI

If the segment is a non tree segment (if you have NOT created hierarchies for value sets used for those segments), then the VOs are named as follows:

FscmTopModelAM.AccountBIAM.FLEX_VS_<segment label>_VI

For example:

Table 5–1 Example segment labels and VO Names

Segment Label	Tree v/s Non Tree	VO Name
PRODUCT	Tree	FscmTopModelAM.AccountBIAM.FLEX_TREE_VS_PRODUCT_VI FscmTopModelAM.AccountBIAM.FLEX_TREECODE_VS_PRODUCT_VI
ORG	Non Tree	FscmTopModelAM.AccountBIAM.FLEX_VS_ORG_VI

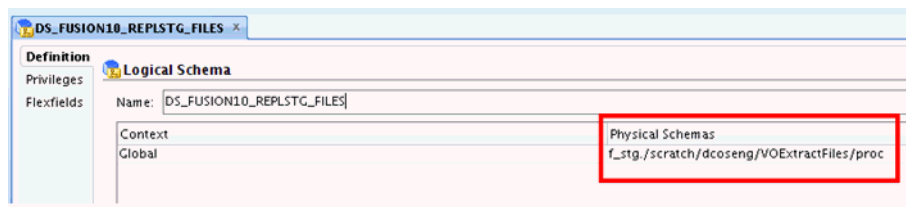
Note: When you add TREECODE VOs, you must enable the 'Disable Effective date filter' option.

- For the CAT# and LOC# KFFs, you will need to add the BI Flattened VO for each KFF.

The BI Flattened VO name for CAT# that needs to be added is FscmTopModelAM.CategoryBIAM.FLEX_BI_Category_VI.

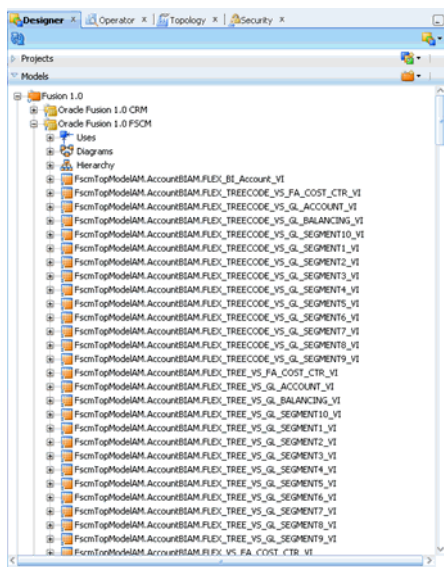
The BI Flattened VO name for LOC# that needs to be added is FscmTopModelAM.LocationBIAM.FLEX_BI_Location_VI.

5. Once you have added these VOs and completed the extraction process, the data files for these VOs will be downloaded into the physical location configured for DS_FUSION10_REPLSTG_FILES logical schema in ODI.



6. The files generated for GL# segment labels mapped to Dim – GL Segmentx (Dim – GL Segment 1-10) will have corresponding pre seeded data stores using a generic naming convention in ODI. The next step is to rename the corresponding files with

appropriate file names so that they can load the corresponding data stores. For reference, the data stores seeded in ODI are shown in the screenshot below.



- The mapping between the files generated and the new file names corresponding to the data stores is based on the segment label to BI Object mapping and setup for that segment (tree v/s non tree).

Taking the same example as mentioned in the previous steps – PRODUCT label is mapped to Dim – GL Segment 1 and is a tree segment and ORG label is mapped to Dim – GL Segment2 and is a non tree segment, then the mapping between the generated files and the new files will be:

Table 5–2 Example file names

File Generated	New File Name
File_ FscmTopModelAM.AccountBIAM.FLEX_ TREE_VS_PRODUCT_VI	File_FscmTopModelAM.AccountBIAM.FLEX_ TREE_VS_GL_SEGMENT1_VI
File_ FscmTopModelAM.AccountBIAM.FLEX_ TREECODE_VS_PRODUCT_VI	File_FscmTopModelAM.AccountBIAM.FLEX_ TREECODE_VS_GL_SEGMENT1_VI
File_ FscmTopModelAM.AccountBIAM.FLEX_ VS_ORG_VI	File_FscmTopModelAM.AccountBIAM.FLEX_ VS_GL_SEGMENT2_VI

- This mapping has to be provided in a configuration file named FinKFFFileRename.cfg which will be used in the downstream processes to load the data from those files. Create and save this config file in the same location where all the data files generated above are present (step 4)

The configuration file has to be created as a comma delimited file and the format of the entries in the file has to be as shown below. Save the file when you are done making the entries.

<Generated File Name>,<New File Name based on the pre seeded data store>

A sample entry in the file would look like:

```
file_fscm_top_model_am_account_biam_flex_vs_gl_management_vi, file_fscm_top_model_am_account_biam_flex_vs_gl_segment2_vi
```


Note: Create the config file in the same platform (Windows or Linux) where you will be eventually saving this file. Avoid copy and paste from one platform to the other. This will avoid issues regarding special characters in text files when crossing different platforms.

5.2 Using ODI to Set Up Key Flex Fields

The BI flattened VO generated for each KFF has columns relating to each segment label. Follow the steps below to set up the mappings for these columns.

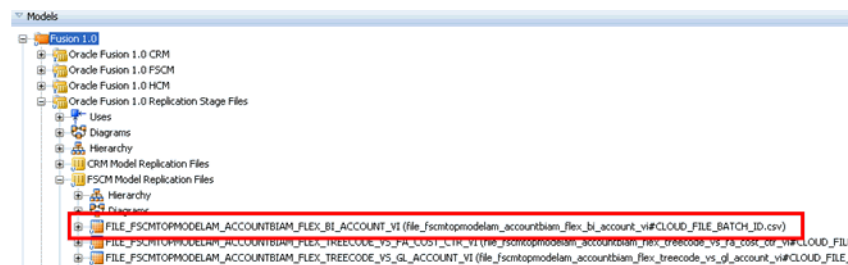
Use ODI to set up Key Flex Fields:

1. For GL# KFF, check the csv file generated for the BI Flattened VO for the list of additional columns for each segment - 'file_fscmtopmodelam_accountbiam_flex_bi_account_vi%.csv'.

These segment columns end with '_' or '_c'. For example, FA_COST_CTR_ and FA_COST_CTR_c, PRODUCT_ and PRODUCT_c.

You need to add these new columns in the file data store and the VO data store in ODI.

The file data store is located in the path shown in the screen shot below.



2. Add the new columns to the data store with the default data type of String (50,50) for all columns.

For example, new columns added in FILE_FSCMTOPMODELAM_ACCOUNTBIAM_FLEX_BI_ACCOUNT_VI.

The screenshot shows the 'Datastore Static Control' window for the file 'FILE_FSCMTOPMODELAM_ACCOUNTBIAM_FLEX_BI_ACCOUNT_VI'. The 'Columns' tab is selected, and a table of column definitions is displayed. The columns are:

Order	Name	Type	Physical length	Logical length	Scale
1	s_g_0	String	50	50	
2	s_g_1	String	50	50	
3	CONCAT_VAL...	String	50	1500	
4	TREE_STRUC...	String	50	30	
5	CreationDate	String	50	29	
6	CreatedBy	String	50	64	
7	LastUpdateDate	String	50	29	
8	LastUpdateBy	String	50	64	
9	ALTACCT2_	String	50	50	
10	ALTACCT2_C	String	50	50	

The last two rows (9 and 10) are highlighted with a red box.

3. Similarly, if you have CAT# KFF or LOC# KFF, then make equivalent updates.

For CAT# KFF, check the csv file generated for the BI Flattened VO for the list of additional columns for each segment - 'file_fscmtopmodelam_categorybiam_flex_bi_category_vi%.csv'. These segment columns end with '_' or '_c'. For example, BASED_CATEGORY_, MINOR_CATEGORY_.

For LOC# KFF, check the csv file generated for the BI Flattened VO for the list of additional columns for each segment - 'file_fscmtopmodelam_locationbiam_flex_bi_location_vi%.csv'. These segment columns end with '_v' or '_c'.

- The corresponding file data stores for CAT# and LOC# are given below.

CAT#KFF file data store: FILE_FSCMTOPMODELAM_CATEGORYBIAM_FLEX_BI_CATEGORY_VI

LOC#KFF file data store: FILE_FSCMTOPMODELAM_LOCATIONBIAM_FLEX_BI_LOCATION_VI

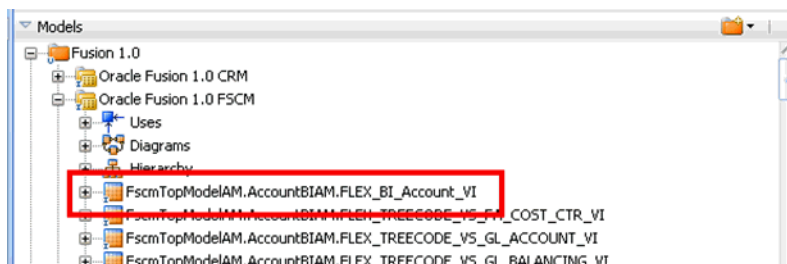
For example, new columns added in FILE_FSCMTOPMODELAM_CATEGORYBIAM_FLEX_BI_CATEGORY_VI

Order	Name	Type	Physical length	Logical len...	Scale
1	s_g_0	String	50	50	
2	s_g_1	String	50	50	
3	CONCAT_VALUES	String	50	1500	
4	CreationDate	String	50	29	
5	CreatedBy	String	50	64	
6	LastUpdateDate	String	50	29	
7	LastUpdatedBy	String	50	64	
8	BASED_CATEGORY_	String	50	50	
9	MINOR_CATEGORY_	String	50	50	

- Repeat the configuration steps for the corresponding VO data stores in ODI as listed below.

The VO data stores are in the path shown in the screenshot below. Use the default data type of Varchar(50,50).

- GL# KFF VO data store: FscmTopModelAM.AccountBIAM.FLEX_BI_Account_VI
- CAT#KFF VO data store: FscmTopModelAM.CategoryBIAM.FLEX_BI_Category_VI
- LOC#KFF VO data store: FscmTopModelAM.LocationBIAM.FLEX_BI_Location_VI



Order	Name	Type	Logical length	Scale
1	s_g_0	DOUBLE		15
2	s_g_1	DOUBLE		15
3	CONCAT_VALUES	VARCHAR		1500
4	TREE_STRUCT_CODE	VARCHAR		30
5	CreationDate	TIMESTAMP		29
6	CreatedBy	VARCHAR		64
7	LastUpdateDate	TIMESTAMP		29
8	LastUpdatedBy	VARCHAR		64
9	ALTACCT2_	VARCHAR		50
10	ALTACCT2_C	VARCHAR		50

6. For newly added columns in both the file data store and VO data store, set the Flexfield value for 'OBI SDS Column Short Name'.

The value should be the same as the column name. Also ensure that the Flexfield value 'Odi Populate Column in SDS' is set to 'Y' for these columns.

7. The screen shots below show example Flexfield values.

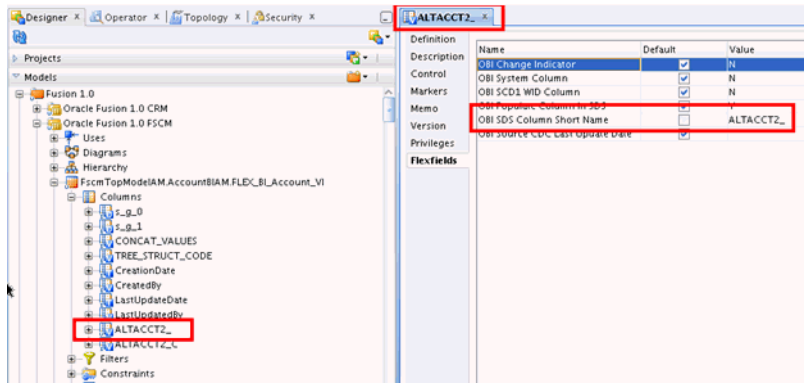
For example, GL# KFF File Data Store Column:

Definition	Name	Default	Value
Description	OBI Change Indicator	<input checked="" type="checkbox"/>	N
Control	OBI System Column	<input checked="" type="checkbox"/>	N
Markers	OBI SCD1 WID Column	<input checked="" type="checkbox"/>	N
Memo	OBI Populate Column in SDS	<input checked="" type="checkbox"/>	Y
Version	OBI SDS Column Short Name	<input type="checkbox"/>	ALTACCT2_
Privileges	OBI Source CDC Last Update Date	<input type="checkbox"/>	

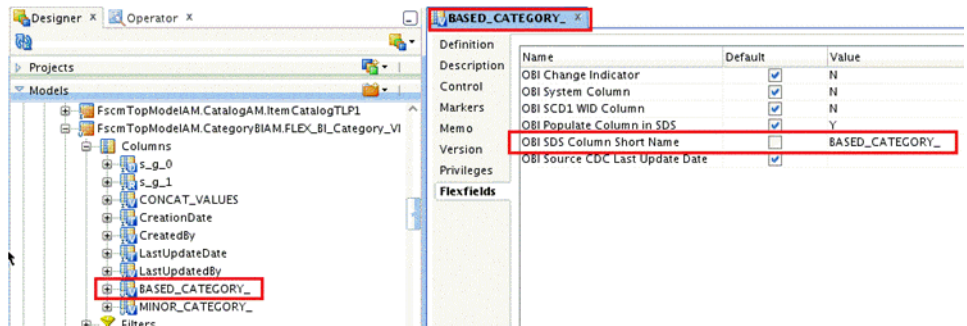
For example, CAT# KFF File Data Store Column:

Definition	Name	Default	Value
Description	OBI Change Indicator	<input checked="" type="checkbox"/>	N
Control	OBI System Column	<input checked="" type="checkbox"/>	N
Markers	OBI SCD1 WID Column	<input checked="" type="checkbox"/>	N
Memo	OBI Populate Column in SDS	<input checked="" type="checkbox"/>	Y
Version	OBI SDS Column Short Name	<input type="checkbox"/>	BASED_CATEGORY_...
Privileges	OBI Source CDC Last Update Date	<input checked="" type="checkbox"/>	

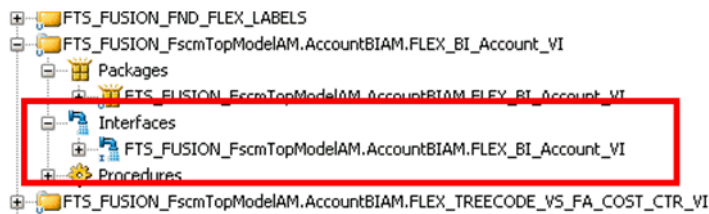
For example, GL# KFF VO Data store Column:



For example, CAT# KFF VO Data store Column:

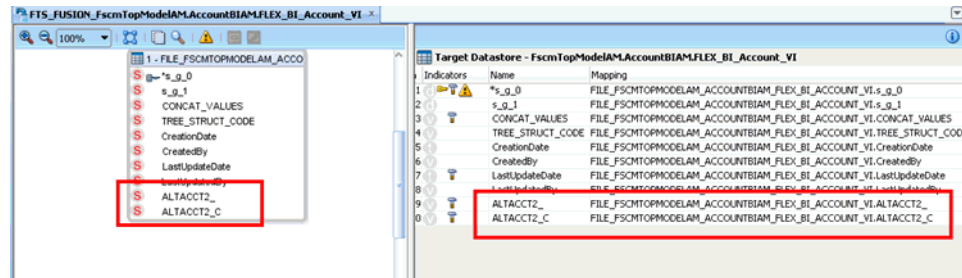


8. Execute GENERATE_SDS_DDL in INCR_REFRESH_MODE.
This process updates the SDS table to include the new extended columns.
9. When you have added the columns in the appropriate data stores, map the columns in the corresponding ODI mappings to load the data.
10. For the GL# KFF, edit the FTS mapping shown below to map these new columns.
The FTS mapping is be located under the folder SDE_FUSION_V1_ADAPTOR.



11. Create a one-to-one mapping between the segment columns as shown below.

For example, Column mappings in FTS_FUSION_FscmTopModelIAM.AccountBIAM.FLEX_BI_Account_VI.



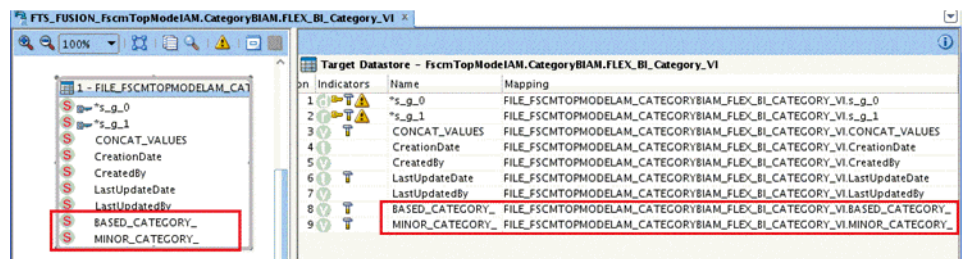
12. Save the changes, then regenerate the underlying scenario for the package.

13. Similarly, if you have CAT# KFF or LOC# KFF, then edit the corresponding FTS mappings to map the new columns:

CAT#KFF FTS mapping: FTS_FUSION_FscmTopModelAM.CategoryBIAM.FLEX_BI_Category_VI

LOC#KFF FTS mapping: FTS_FUSION_FscmTopModelAM.LocationBIAM.FLEX_BI_Location_VI

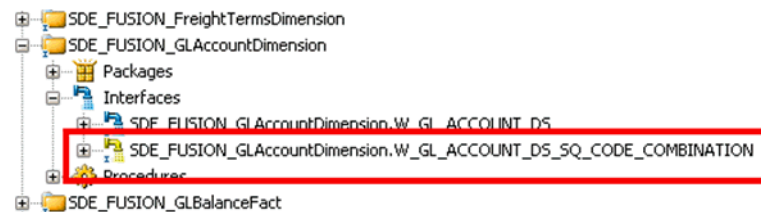
For example, Column mappings in FTS_FUSION_FscmTopModelAM.CategoryBIAM.FLEX_BI_Category_VI



14. Save the changes, and regenerate the underlying scenarios for the packages.

15. Edit the SDE mapping for GL# KFF to map these new columns to corresponding columns in the staging table as shown below.

The SDE mapping is located in the same SDE_FUSION_V1_Adaptor folder.



16. The column mapping is based on the segment label to BI Object mapping done in your Fusion setup.

For GL#KFF, the mappings for FA_COST_CTR, GL_ACCOUNT and GL_BALANCING labels are known and should be mapped as shown below.

Table 5-3 Example column names and mappings

Target Column Name	Mapping
COST_CENTER_ATTRIB	CCIDVO.FA_COST_CTR_c
COST_CENTER_NUM	CCIDVO.FA_COST_CTR_

Table 5-3 (Cont.) Example column names and mappings

Target Column Name	Mapping
BALANCING_SEGMENT_ATTRIB	CCIDVO.GL_BALANCING_c
BALANCING_SEGMENT_NUM	CCIDVO.GL_BALANCING_
NATURAL_ACCOUNT_ATTRIB	CCIDVO.GL_ACCOUNT_c
NATURAL_ACCOUNT_NUM	CCIDVO.GL_ACCOUNT_

17. The column mapping for the other segment labels is based on the corresponding BI Objects mapped in your Fusion setup.

For example, assuming that you have mapped PRODUCT label to Dim – GL Segment1 and ORG label to Dim – GL Segment2, the column mapping will look like:

Table 5-4 Example column names and mappings

Target Column Name	Mapping
ACCOUNT_SEG1_ATTRIB	CCIDVO.PRODUCT_c
ACCOUNT_SEG1_CODE	CCIDVO.PRODUCT_
ACCOUNT_SEG2_ATTRIB	CCIDVO.ORG_c
ACCOUNT_SEG2_CODE	CCIDVO.ORG_

For example, assuming that you have mapped ALTACCT label to Dim – GL Segment3 and GL_MANAGEMENT label to Dim – GL Segment5, then the column mapping will look like:

Table 5-5 Example column names and mappings

Target Column Name	Mapping
ACCOUNT_SEG3_ATTRIB	CCIDVO.ALTACCT_c
ACCOUNT_SEG3_CODE	CCIDVO.ALTACCT_
ACCOUNT_SEG5_ATTRIB	CCIDVO.GL_MANAGEMENT_c
ACCOUNT_SEG5_CODE	CCIDVO.GL_MANAGEMENT_

18. Save the changes, regenerate the underlying scenario for the package.

19. If applicable, then make equivalent updates for CAT# and LOC#.

The corresponding mappings for both are given below.

CAT#KFF

a.SDE mapping: SDE_FUSION_FixedAssetCategoryDimension

b.Staging table: W_ASSET_CATEGORY_DS

LOC#KFF:

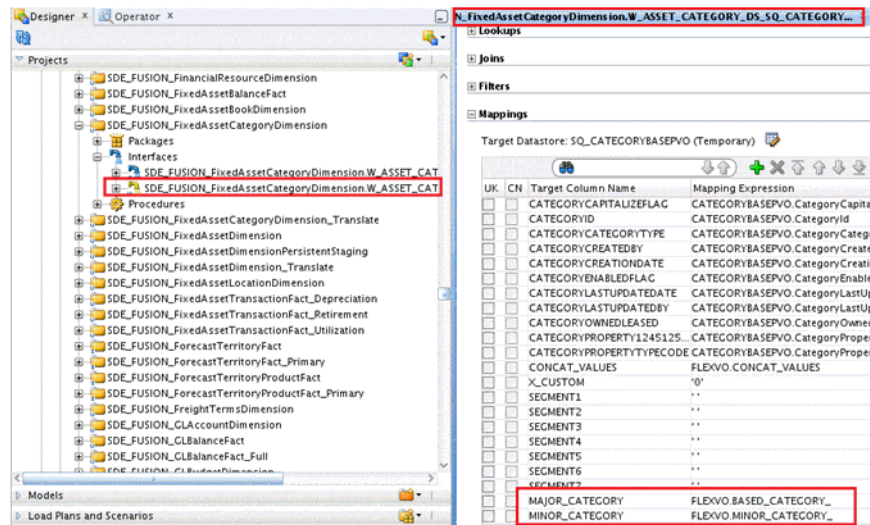
a.SDE mapping: SDE_FUSION_FixedAssetLocationDimension

b.Staging table: W_ASSET_LOCATION_DS

20. For CAT#KFF, if you have mapped BASED_CATEGORY and MINOR_CATEGORY and would like to use them as the Major and Minor Category, then the column mapping is as follows:

Table 5–6 Example column names and mappings

Target Column Name	Mapping
MAJOR_CATEGORY	FLEXVO.BASED_CATEGORY_
MINOR_CATEGORY	FLEXVO.MINOR_CATEGORY_



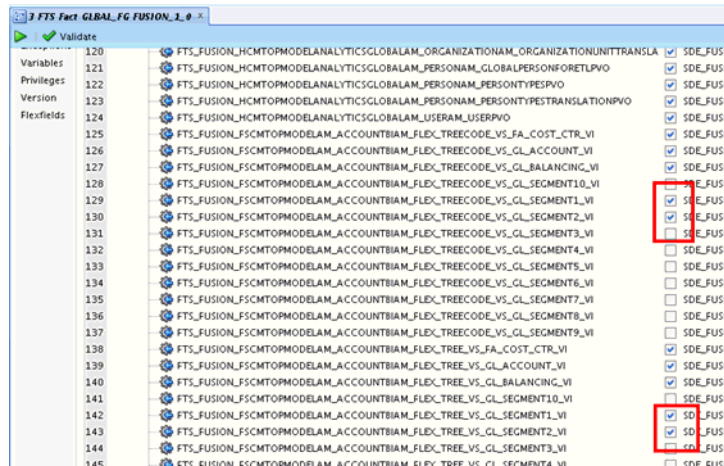
21. Save the changes, and regenerate the underlying scenarios for the packages.
22. Before generating a load plan for execution, enable FTS and SDE scenarios corresponding to GL Segment 1-10 in load plan components so that they are included in the final generated load plan.

For FTS scenarios, you can edit any ONE of the following FTS load plan components. These LP components will be located in BIAPPS Load Plan – Load Plan Dev Components –FTS:

- 3 FTS Fact BUDGET_FG FUSION_1_0
- 3 FTS Fact GLBAL_FG FUSION_1_0
- 3 FTS Fact GLCOGS_FG FUSION_1_0
- 3 FTS Fact GLJRNL5_FG FUSION_1_0
- 3 FTS Fact GLREVN_FG FUSION_1_0

23. Enable the FTS scenarios based on your Fusion setup. For example, if your PRODUCT label is mapped to Dim – GL Segment 1 and is a tree segment and ORG label is mapped to Dim – GL Segment 2 and is a non tree segment, then enable the following scenarios:

- FTS_FUSION_FSCMTOPMODELAM_ACCOUNTBIAM_FLEX_TREE_VS_GL_SEGMENT1_VI
- FTS_FUSION_FSCMTOPMODELAM_ACCOUNTBIAM_FLEX_TREECODE_VS_GL_SEGMENT1_VI
- FTS_FUSION_FSCMTOPMODELAM_ACCOUNTBIAM_FLEX_VS_GL_SEGMENT2_VI



For SDE scenarios, edit the 3 SDE Dims GLSEG_DIM FUSION_1_0 load plan component. This load plan component will be located in the path BIAPPS Load Plan – Load Plan Dev Components –SDE – FUSION_1_0.

24. For this load plan component, enable the main 'Parallel' branch and then disable the steps that are not required.
25. If your Segment 1 is a tree segment and Segment2 is a non tree segment, then you enable the following scenarios in the LP component and disable the remaining steps:

- SDE_FUSION_GLSEGMENTDIMENSIONHIERARCHY_SEGMENT1
- SDE_FUSION_GLSEGMENTDIMENSION_TREE_SEGMENT1
- SDE_FUSION_GLSEGMENTDIMENSION_SEGMENT2

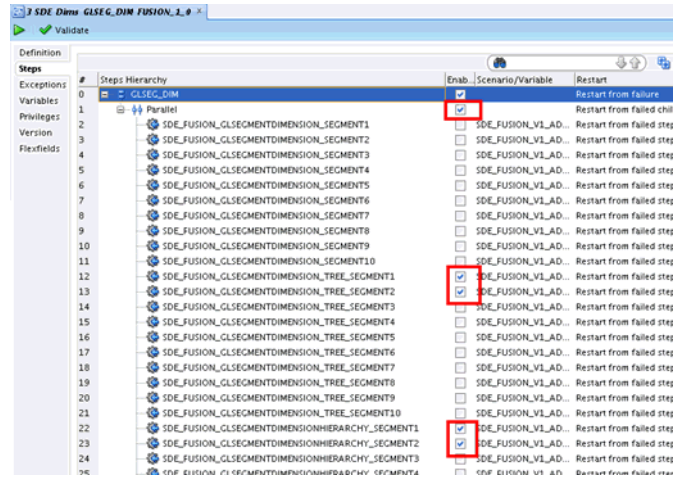
If Dim – GL Segmentx is mapped to a tree segment label in Fusion, then you enable:

- SDE_FUSION_GLSEGMENTDIMENSIONHIERARCHY_SEGMENTx
- SDE_FUSION_GLSEGMENTDIMENSION_TREE_SEGMENTx

If Dim – GL Segmentx is mapped to a non tree segment label in Fusion, then you enable:

- SDE_FUSION_GLSEGMENTDIMENSION_SEGMENTx

The screen shot below shows an example modified Load Plan Component.



26. Generate a load plan based on your offering and the modules implemented.

In the generated load plan, verify that your settings on the FTS and SDE load plan components were carried over accordingly.

5.3 Additional Steps for Fusion Financials Implementations

If you are deploying Fusion Financials on Oracle Cloud, then you need to make the additional modifications to FTS Fusion mappings related to GL Balances, as described in this section.

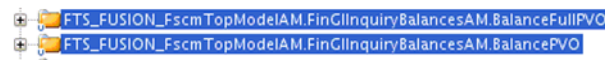
Note: This section is only applicable if you have an Oracle Fusion implementation on Oracle Cloud.

1. In ODI Studio, locate the following two FTS Fusion step mappings in the ODI Repository:

FTS_FUSION_FscmTopModelAM.FinGlInquiryBalancesAM.BalanceFullPVO

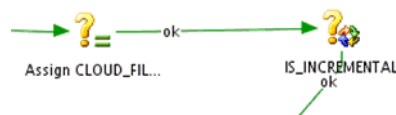
FTS_FUSION_FscmTopModelAM.FinGlInquiryBalancesAM.BalancePVO

The FTS mappings are located in the ODI repository under the folder Mappings - SDE_FUSION_V1_ADAPTOR.



2. Edit the packages in the two folders.

Before the change, the IS_INCREMENTAL variable should be displayed as in the example screenshot below.



3. For each package, click on the IS_INCREMENTAL variable to display the Properties dialog, and change the **Type** value from 'Refresh Variable' to 'Set Variable', and set the **Value** to 'N', as shown in the example screenshot below.

The screenshot displays the Oracle Business Intelligence configuration tool interface. On the left, a tree view shows categories like Event Detection, Files, Internet, Metadata, Oracle Data Integrator Objects, Plugins, SAP, and Utilities. The main workspace shows a workflow diagram with nodes and connecting arrows. One node is labeled 'Assign CLOUD_FIL...' and another is 'IS_INCREMENTAL'. Below the workspace is a 'Properties' panel with tabs for General, Advanced, Memo, Version, and Privileges. The 'General' tab is active, showing fields for Step name (IS_INCREMENTAL), Linked object (IS_INCREMENTAL), and Value (N). There are also radio buttons for 'Assign' (selected) and 'Increment', and a dropdown menu for 'Type' set to 'Set Variable'.

4. Save the changes to the packages and regenerate the scenario for both packages.

Deploying the ODI Repository for Non-Oracle Source Databases

This chapter provides information about deploying the ODI Repository for non-Oracle source databases.

During installation and setup of Oracle BI Applications, if your source database is Oracle, then an instance of the ODI Repository is automatically deployed and no further setup steps are required. If your source database is MS SQL Server, UDB DB2, or UDB 400, then you must perform the configuration steps in this section to deploy a new instance of the ODI Repository.

If you have multiple sources and one or more of the source databases is non-Oracle, you need to follow the procedures in this section for all source databases, including any Oracle source databases.

Follow these steps in the order specified:

1. Export security settings from the original ODI repository by following the steps in [Section 6.1, "Exporting Security Settings from Original ODI Repository"](#).
2. Create a new master ODI repository by following the steps in [Section 6.2, "Creating a New Master Repository"](#).
3. Connect to the new master ODI repository by following the steps in [Section 6.3, "Connecting to the New Master Repository"](#).
4. Create a new work repository by following the steps in [Section 6.4, "Creating a New Work Repository"](#).
5. Import source adapter metadata content by following the steps in [Section 6.5, "Importing Source Adapter Metadata Content into the New ODI Repository"](#).
6. Enable external security authentication by following the steps in [Section 6.6, "Enabling External Authentication"](#).
7. Import security settings into the ODI repository by following the steps in [Section 6.7, "Importing Security Settings Into the ODI Repository"](#).
8. Configure the servers by following the steps in [Section 6.8, "Configure the Data Servers"](#).
9. **Next Steps:** In Oracle BI Applications Configuration Manager, register sources, configure parameters, and generate load plans.

Note: After you perform these procedures for a particular source and you then want to add a new source, you only need to perform the steps in [Section 6.5, "Importing Source Adapter Metadata Content into the New ODI Repository."](#) This is true regardless of the database technology of the second source.

For example, if you have a PeopleSoft 9.0 source on a SQL Server database, then you would perform the steps in [Section 6.1](#) through [Section 6.8](#). If you then wanted to add a second source, for example Siebel 8.1 (on an Oracle, DB2, or SQL Server database), you would only need to perform the steps in [Section 6.5](#).

6.1 Exporting Security Settings from Original ODI Repository

You need to export the security settings from the ODI Repository that were created using the Oracle Business Analytics Suite RCU.

To export security settings from the original ODI Repository:

1. Log into ODI Studio.
2. Navigate to **Topology**, and select **Export Security Settings**.
3. Save the export file to a local directory.

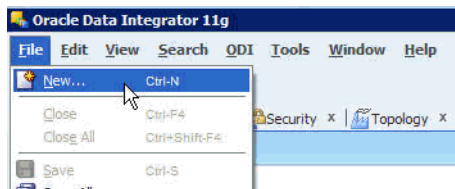
You will use this export file to import the security settings in a later step.

6.2 Creating a New Master Repository

In this procedure, you use ODI Studio to create a new Master Repository.

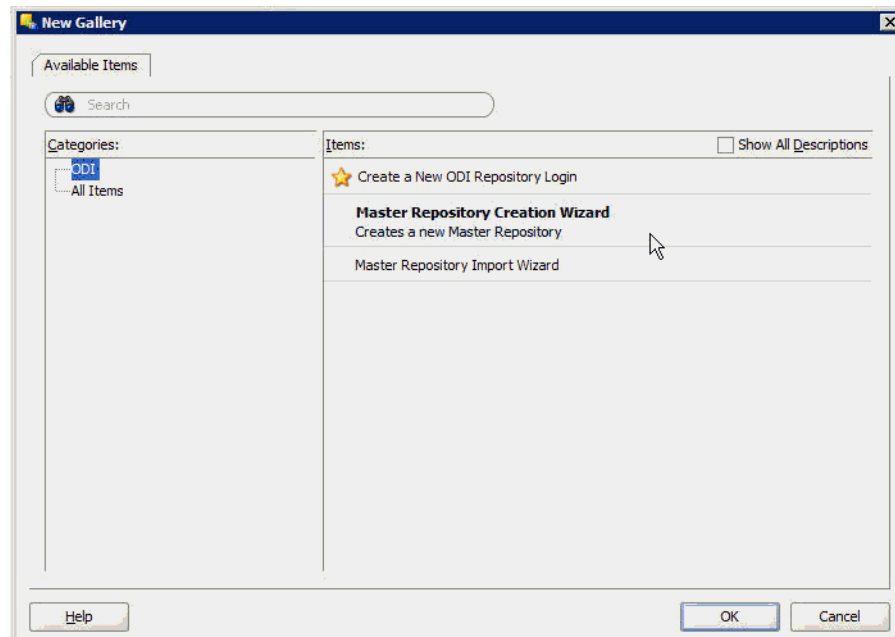
To create a new Master Repository:

1. Launch ODI Studio.
2. Open the New Gallery by selecting **File** and then **New**.



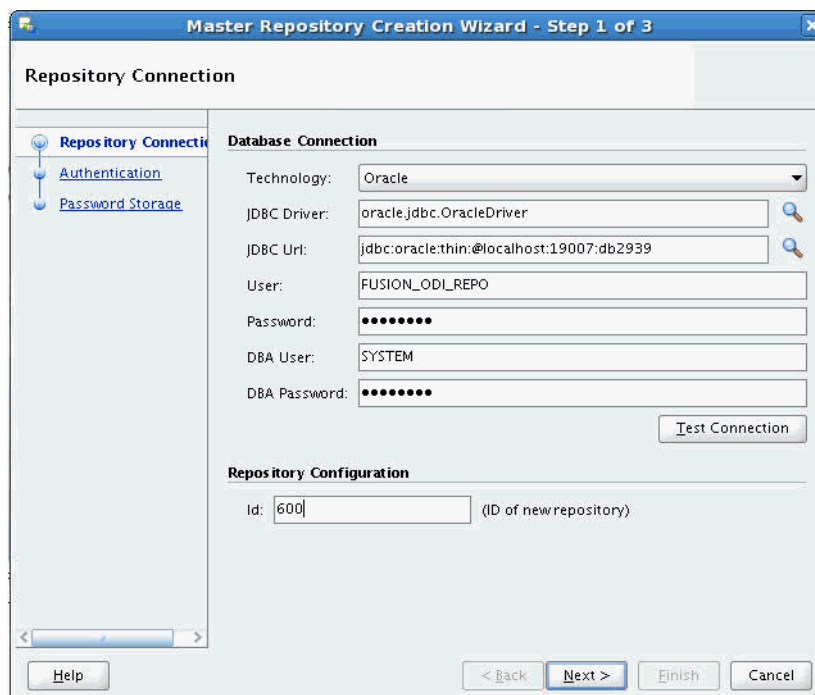
3. In the Categories tree of the New Gallery, select **ODI**.
4. From the Items list, select **Master Repository Creation Wizard**, and click **OK**.

The Master Repository Creation Wizard opens.



5. Specify the Database Connection properties, as follows:

Property	Description
Technology	Select the technology that will host your Master Repository.
JDBC Driver	The driver used to access the technology that will host the repository.
JDBC URL	The URL used to establish the JDBC connection to the database. Note that the JDBC Driver and URL properties are synchronized and the default values are technology dependent.
User	The name of the schema where the Master Repository will be stored.
Password	The password for the schema.
DBA User	The user ID on the database with DBA privileges such as SYSTEM. Do not use SYS, which requires logging in as SYSDBA.
DBA Password	The password for the DBA User.



6. In the Repository Configuration area, enter a unique, three-digit numeric ID.
7. (Optional) Click **Test Connection** to test the connection to the Master Repository.
8. Click **Next**.
9. In the Authentication screen, select **Use External Authentication**, and specify the following:

Property	Description
Supervisor User	The user name of the ODI Supervisor that was specified during the initial Oracle BI Applications installation.
Supervisor Password	The Supervisor User's password that was specified during the initial Oracle BI Applications installation.

Master Repository Creation Wizard - Step 2 of 3

Authentication

Select the authentication mode that this master repository will use. Use ODI authentication to manage users using ODI's internal security system. Use External authentication if you wish to use an external enterprise identity store, such as Oracle Internet Directory, to manage user authentication.

Use ODI Authentication
 Supervisor User: SUPERVISOR
 Supervisor Password:
 Confirm Password:

Use External Authentication
 Supervisor User: Administrator1
 Supervisor Password:

Help < Back Next > Finish Cancel

10. Click Next.

11. In the Password Storage screen, select **Internal Password Storage**.

Master Repository Creation Wizard - Step 3 of 3

Password Storage

Internal Password Storage
 External Password Storage

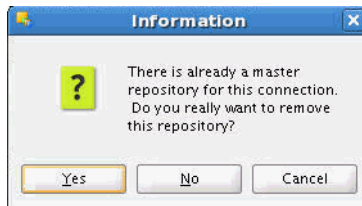
MBean Server Parameters

Server Type: Oracle WebLogic
 Host: localhost
 Port: 7001
 User:
 Password:

Test Connection

Help < Back Next > Finish Cancel

12. Click Yes to indicate you want to remove the existing repository.



13. In the Master Repository Creation Wizard, click **Finish**.

6.3 Connecting to the New Master Repository

In this procedure, you create a new Master Repository login connection.

To connect to the new Master Repository:

1. Open the New Gallery by selecting **File** and then **New**.
2. In the Categories tree of the New Gallery, select **ODI**.
3. From the Items list, select **Create a New ODI Repository Login**.
4. Click **OK**.

The Repository Connection Information dialog opens.

5. Specify the ODI connection details, as follows:

Property	Description
Login name	A connection alias.
User	The ODI Supervisor user name that was defined during the Oracle BI Applications installation. Note that the Supervisor user name is case sensitive and must be entered exactly as previously defined.
Password	The ODI Supervisor password that was defined during the Oracle BI Applications installation.

- Specify the Database Connection (Master Repository) details, as follows:

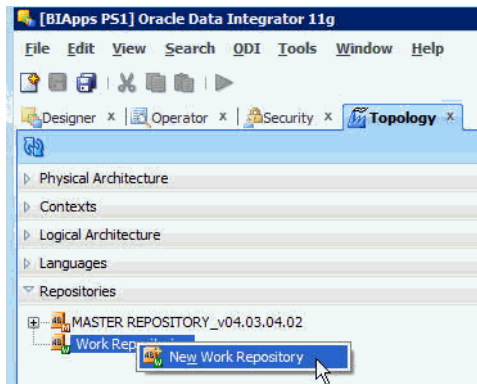
Property	Description
User	The database user login of the schema that contains the Master Repository.
Password	The User password.
Driver List	Select the driver required to connect to the database supporting the Master Repository.
Driver Name	The complete driver name.
URL	The URL used to establish the JDBC connection to the database hosting the repository.

- In the Work Repository area, select **Master Repository Only**.
- (Optional) Click **Test** to verify that the connection is working.
- Click **OK**.

6.4 Creating a New Work Repository

To create a new Work Repository:

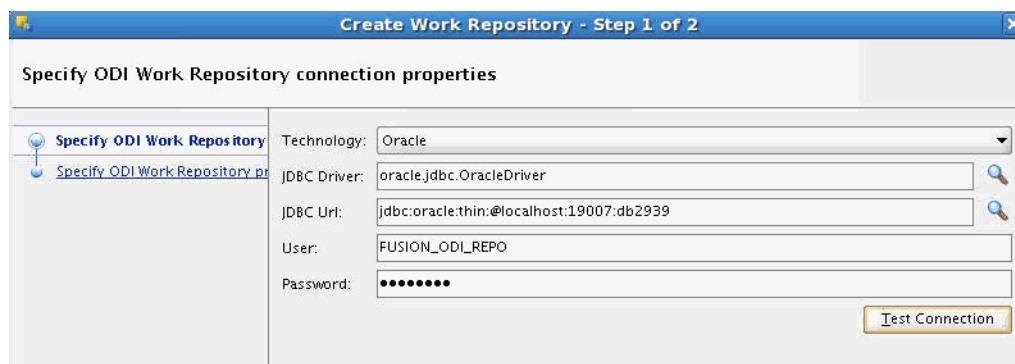
- In the Topology Navigator, go to the **Repositories** panel.
- Right-click the Work Repositories node, and select **New Work Repository**.



The Create Work Repository Wizard opens.

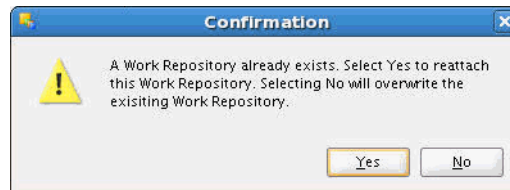
- Specify the ODI Work Repository connection details. Note that the Work Repository needs to be in the same schema as the Master Repository. Provide the same credentials used to create the Master Repository.

Property	Description
Technology	Select the technology that will host your Work Repository.
JDBC Driver	The driver used to access the technology that will host the repository.
JDBC URL	The complete path of the data server to host the Work Repository. Note that the JDBC Driver and URL properties are synchronized and the default values are technology dependent.
User	The name of the schema where the Work Repository will be stored.
Password	The password for the schema.



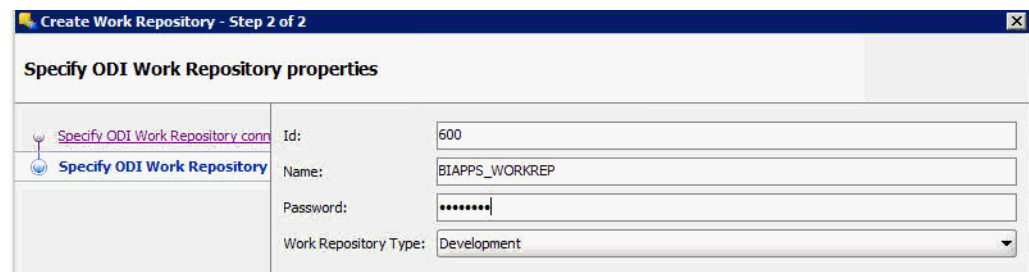
- (Optional) Click **Test Connection** to verify the connection is working.
- Click **Next**.

An informational dialog notifies you that a Work Repository already exists.



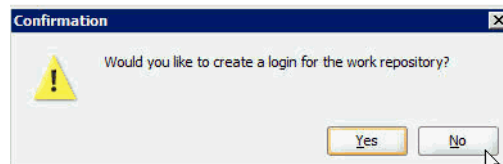
6. Click **No** to overwrite the existing repository.
7. Specify the Work Repository properties, as follows:

Property	Description
ID	Enter the same ID used when creating the new Master Repository.
Name	A name for the Work Repository.
Password	This field is optional. The value can be any value. It does not correspond to the ODI Supervisor or database passwords.
Work Repository Type	Select Development .

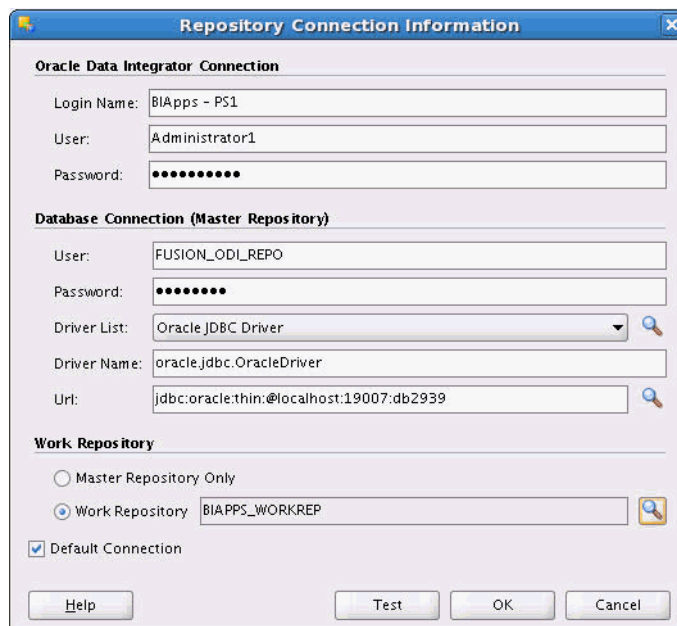


8. Click **Finish**.

A message dialog asks if you would like to create a login for the Work Repository.



9. The Confirmation dialog asks if you would like to create a login for the Work Repository. Click **No**.
10. Edit the repository connection details to connect to the Work Repository by doing the following:
 - a. Log off of the Work Repository.
 - b. Open the Repository Connection Information dialog.
 - c. In the Work Repository area, select the **Work Repository** option, and then select the name of the Work Repository you just created.



d. Click OK.

6.5 Importing Source Adapter Metadata Content into the New ODI Repository

In this procedure, you import source-specific metadata content into the new ODI Repository by running the command line utility.

This procedure contains the following sections:

- Section 6.5.1, "Preparing to Import Source Adapter Metadata Content"
- Section 6.5.2, "Running the Command Line Utility to Import Source Adapter Metadata Content"

6.5.1 Preparing to Import Source Adapter Metadata Content

In preparation to import source-specific metadata content into the new ODI Repository, do the following:

1. Locate the directory `<BI_ORACLE_HOME>\biapps\admin\provisioning\odi`.
The .zip files in this directory contain the source-specific metadata content you will import into the new repository. The naming convention for the .zip files is `<Source adapter>_<database technology>_ODI_Metadata.zip`.
2. Unzip the appropriate metadata content file for your source adapter and database technology.
3. Locate the file `bia-odi-util.jar`, which is stored in `C:\<Middleware Home>\<BI_ORACLE_HOME>\biapps\biaodiutil\lib`.
4. Locate the file `jps-config-jse.xml`, which is stored in `C:\<Middleware Home>\user_projects\domains\bifoundation_domain\odi-client-config\embedded`.

In the command, this file is referred to as `JPSCONFIGFILE`.

5. Create a logs directory to store the logs of the import process.

In the command, this directory is referred to as LOGDIR.

6. Locate the ODI Home directory.

In the command, this directory is referred to as ODI_HOME.

7. Obtain the following ODI Repository connection details:

- JDBC URL for the ODI Repository database
- JDBC driver
- Work Repository name
- ODI Repository database user name and password
- ODI user and password

This connection information is displayed in ODI Studio in the Repository Connection Details dialog.

6.5.2 Running the Command Line Utility to Import Source Adapter Metadata Content

Follow this procedure to import the metadata content files into the new ODI Repository. You will first import the metadata for Oracle BI Applications, after which you will import the metadata for the appropriate source adapters.

For potential performance enhancement, Oracle recommends running the command line utility on the database server machine.

To import metadata content by running the command line utility:

1. Open a command line utility.
2. Navigate to the C:\<Middleware Home>\<BI_ORACLE_HOME>\biapps\biaodiutil\lib directory.
3. Run the following command to import the Oracle BI Applications metadata. The PLV code for this adapter is BIA_11.

On Windows:

```
<JAVA_HOME>\bin\java.exe -client -Xms32m -Xmx1024m -classpath
<ODI_HOME>\oracledi.sdk\lib\*; <ODI_
HOME>\inventory\Scripts\ext\jlib\*; <ODI_HOME>\modules\oracle.idm_
11.1.1\*; <ODI_HOME>\modules\oracle.jps_11.1.1\*; <BIAODIUTIL_
HOME>\import\core\import\*; <BIAODIUTIL_
HOME>\import\core\lib\bia-odi-util.jar oracle.apps.biaodiutil.Import
MODE=IMPREGEN FILEDIR=<EXP_FILE_DIR> PLV=<PLV_CODE>
JPSCONFIGFILE=<JPS_CONFIG_FILE> LOGDIR=<LOG_DIR>
```

For example:

```
C:\Java64\jdk1.6.0_35\bin\java.exe -client -Xms32m -Xmx1024m
-classpath
C:\oracle\product\odi11.1.1.7\oracledi.sdk\lib\*;C:\oracle\product\odi
11.1.1.7\inventory\Scripts\ext\jlib\*;C:\oracle\product\odi11.1.1.7\mo
dules\oracle.idm_
11.1.1\*;C:\oracle\product\odi11.1.1.7\modules\oracle.jps_
11.1.1\*;C:\temp\biaodiutil\import\core\import\*;C:\temp\biaodiutil\im
port\core\lib\bia-odi-util.jar oracle.apps.biaodiutil.Import
MODE=IMPREGEN FILEDIR=c:/temp/export2/ PLV=BIA_11
```

On UNIX/Linux:

```
<JAVA_HOME>\bin\java.exe \-client \-Xms32m \-Xmx1024m \-classpath
"<ODI_HOME>/oracledi.sdk/lib/*:<ODI_
HOME>/inventory/Scripts/ext/jlib/*:<ODI_HOME>/modules/oracle.idm_
11.1.1/*:<ODI_HOME>/modules/oracle.jps_11.1.1/*:<BIAODIUTIL_
HOME>/import/core/import/*:<BIAODIUTIL_
HOME>/import/core/lib/bia-odi-util.jar" oracle.apps.biaodiutil.Import
MODE=IMPREGEN FILEDIR=<EXP_FILE_DIR> PLV=<PLV_CODE>
JPSCONFIGFILE=<JPS_CONFIG_FILE> LOGDIR=<LOG_DIR>
```

For example:

```
java \-client \-Xms32m \-Xmx1024m \-classpath
"/scratch/aime/oracle/product/11.1.1/Oracle_ODI_
1/oracledi.sdk/lib/*:/scratch/aime/oracle/product/11.1.1/Oracle_ODI_
1/inventory/Scripts/ext/jlib/*:/scratch/aime/oracle/product/11.1.1/Ora
cle_ODI_1/modules/oracle.idm_
11.1.1/*:/scratch/aime/oracle/product/11.1.1/Oracle_ODI_
1/modules/oracle.jps_
11.1.1/*:/scratch/aime/biaodiutil/import/core/import/*:/scratch/aime/b
iaodiutil/import/core/lib/bia-odi-util.jar"
oracle.apps.biaodiutil.Import MODE=IMPREGEN FILEDIR=c:/temp/export2/
PLV=BIA_11
```

A description of the parameters follows:

Parameter	Description
MODE	(Mandatory) Possible values: <ul style="list-style-type: none"> ■ IMPREGEN - Use this mode to import the adapter metadata content and generate scenarios for that adapter. ■ IMPORT - Use this mode to import metadata content only, without generating scenarios. A parameter file is generated that allows you to do the scenario generation at a later time. ■ SCEREGEN - Use this mode to generate scenarios only. Before running this mode, you need to have imported content using the IMPORT mode so that the parameter file required for scenario generation is already present.
FILEDIR	(Mandatory) The complete path for the export file directory files.
CONNFILE	(Optional) The complete path of the file containing the Connection Details. If this parameter is not used, the utility will prompt for the connection details. An example of a connection file is as follows: <pre># ===== # ODI Connection Information # ===== # Connection Information for Destination Oracle Data #Integrator Repository MasterJDBCdriver=oracle.jdbc.OracleDriver MasterJDBCurl=jdbc:oracle:thin:@<host>:1521:orcl MasterJDBCUser=ODI_REP MasterJDBCPass=odirep WorkName=BIAPPS_WORKREP ODIUser=SUPERVISOR ODIPass=odipass</pre>
LOGLEVEL	(Optional) Possible values are 1, 3, or 5. The default value is 1, with 5 being the most verbose.

Parameter	Description
LOGDIR	<p>The complete path for the log directory.</p> <p>The following log files are created:</p> <ul style="list-style-type: none"> ■ Summary - Contains high level log information. The naming convention is Summary_ImportUtility_<DATE_TIME><ADAPTOR><SRCTECH>_log. ■ Import - Contains details about the import. Has a log and error file. The naming convention is BasicImport_<DATE_TIME>_<ADAPTOR>_log. ■ Scenario Generation - Contains details about the scenario generation. Has a log and error file. The naming convention is RegenScen_<DATE_TIME>_<ADAPTOR_MAPPING_FOLDER>_log.
PLV	<p>(Mandatory) The PLV code for the adapter being imported.</p> <p>Possible values:</p> <ul style="list-style-type: none"> ■ AGILE_PLM_9_3_1 ■ AGPLM_9_3_2 ■ AILE_GILE_PLM_PROC_6_1 ■ EBS_11_5_10 ■ EBS_12_0 ■ EBS_12_1_1 ■ EBS_12_1_2 ■ EBS_12_1_3 ■ EBS_12_2 ■ JDE_9_0 ■ JDE_9_1 ■ PSFT_9_0 ■ PSFT_9_1 ■ PSFT_9_2 ■ SEBL_8_1_1 ■ SEBL_8_2_2
SRCTECH	<p>(Mandatory) The source technology for the adapter being imported.</p> <p>Possible values:</p> <ul style="list-style-type: none"> ■ For IBM DB2/400: IBM_DB2_400 ■ For IBM DB2 UDB: IBM_DB2_UDB ■ For SQL Server: MICROSOFT_SQL_SERVER ■ For ORACLE: ORACLE ■ For Oracle Fusion (via BI Server): ORACLE_BI <p>Note: If you have multiple sources on both Oracle and non-Oracle databases, you need to import the PLV metadata for the Oracle database using ORACLE (or ORACLE_BI for Oracle Fusion sources) as the SRCTECH value.</p>
JPSCONFIGFILE	<p>(Mandatory if the repository has already been enabled for external authentication.) The path and name of the JPSCONFIGFILE.</p>
SSOFILE	<p>(Optional) The path and name of the SSO file.</p>

4. Enter the ODI Repository connection details when prompted.
5. Monitor the process by viewing the command line window or the log files being written to the logs directory.

Note that this process can be lengthy and can last from 45 minutes to three hours, depending on the number of adapters for which you are importing metadata content.

6. When the import process is complete, log into ODI Studio and verify the data stores and mappings for the new adapter are present.
7. Repeat steps 1 through 6 for each adapter you need to import, substituting the appropriate PLV code.

6.5.3 Add an ODI Administrator User

When the repository is refreshed, log on as the SUPERVISOR user (password welcome) and add the following user:

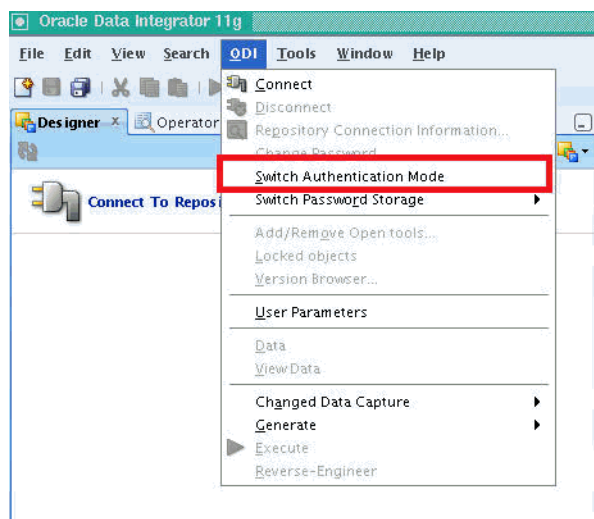
1. Specify the Name as 'Administrator1'.
2. Specify the Password as 'Admin12345'.
3. Select the 'Supervisor' property.

6.6 Enabling External Authentication

In this procedure, you enable external authentication in ODI using the Switch Authentication Mode wizard in ODI Studio.

To enable external authentication:

1. Launch ODI Studio.
2. Disconnect ODI Studio from the ODI Repository.
3. Shut down all components using the ODI Repository.
4. From the ODI menu, select **Switch Authentication Mode**.



5. Enter the appropriate values in the Login and Credentials screens, and click **Finish**.

Access the online help if you need assistance in the Login and Credentials screens.

6.7 Importing Security Settings Into the ODI Repository

In this procedure you will import the security settings that you exported in [Section 6.1, "Exporting Security Settings from Original ODI Repository."](#)

To import security settings:

1. Log into ODI Studio.
2. Navigate to **Topology**, and select **Import Security Settings**.
3. In the Import Security Settings dialog, select **Import From a Folder**, and browse for the export file.
4. Click **Yes** in the Confirmation dialog,

You can now log into the ODI Repository with the security settings configured when the ODI Repository was created using the Oracle Business Analytics Suite RCU.

6.8 Configure the Data Servers

Follow this procedure to perform post-import configurations.

To perform post-import configurations:

1. Log into ODI Studio using the BI Applications Administrator user.
2. Configure the BIAPPS_DW data server:
 - a. In ODI Studio, navigate to **Topology, Physical Architecture, Oracle, BIAPPS_DW**.
 - b. On the Definition tab, in the Connection area, enter the following:

Field	Description
User	User name of the <prefix>_DW schema user.
Password	Password for the <prefix>_DW schema user.

- c. On the JDBC tab, enter the JDBC URL for the <prefix>_DW schema.
For example: jdbc:oracle:thin:@myhost:1521/orcl
 - d. In the Physical Architecture pane, expand the BIAPPS_DW data server and double-click **BIAPPS_DW.BIAPPS_DW**.
 - e. Enter the DW schema user for both **Schema(Schema)** and **Schema(Work)** fields.
3. Configure the BIAPPS_BIACOMP data server:
 - a. In ODI Studio, navigate to **Topology, Physical Architecture, Oracle, BIAPPS_BIACOMP**.
 - b. On the Definition tab, in the Connection area, enter the following:

Field	Description
User	User name of the <prefix>_BIACM_IO schema user.
Password	Password for the <prefix>_BIACM_IO schema user.

- c. On the JDBC tab, enter the JDBC URL for BIACM_IO (the same as that for <prefix>_BIACOMP).

For example: jdbc:oracle:thin:@myhost:1521/orcl

- d. In the Physical Architecture pane, expand the BIAPPS_BIACOMP data server and choose the Physical Schema under it, and double-click. double-click **BIAPPS_DW.BIAPPS_DW**.
- e. Enter <prefix>_BIACM_IO user for both **Schema(Schema)** and **Schema(Work)** fields.

Repository Creation Utility Screens

This appendix describes the options available when you run the Repository Creation Utility.

- Welcome
- Create Repository
- Database Connection Details
- Select Components
- Schema Passwords
- Custom Variables
- Map Tablespaces
- Summary
- Completion Summary

A.1 Welcome

This is the first screen that appears when RCU is started. Note the navigation pane on the left that summarizes the tasks that RCU will help you complete. Each item in the navigation pane represents a specific screen that will prompt you for information required to create or drop your schemas.

Click **Skip This Page Next Time** if you do not want to see the Welcome screen the next time you start RCU.

A.2 Create Repository

Use this screen to select the action you want to perform, as described in the following table:

Table A-1 RCU Actions

Action	Description
Create	Select this option to create component schemas in the database.
Drop	Select this option to remove component schemas from the database.

A.3 Database Connection Details

Use this screen to specify the connection credentials to the database in which you will be creating or dropping your schemas. Select one of the following depending on your database:

- [Specifying Connection Credentials for Oracle Databases and Oracle Databases Enabled for Edition-Based Redefinition](#)
- [Specifying Connection Credentials for Oracle MySQL Databases](#)
- [Specifying Connection Credentials for Microsoft SQL Server Databases](#)
- [Specifying Connection Credentials for IBM DB2 Databases](#)

Click **Next** when you are finished entering the connection credentials for your database. A screen indicating the progress of the installer establishing the connection with the specified database will appear. If an error occurs while the connection is being established, the error message(s) appear in the Messages field on the Database Connection Details screen.

Specific database requirements for the various schemas can be found in the *Oracle Fusion Middleware System Requirements and Specifications* document.

For certified database versions, see the *System Requirements and Supported Platforms for Oracle Fusion Middleware 11gR1* document, which is available on the Oracle Fusion Middleware Supported System Configurations page.

Note: If you are running the RCU for Oracle Business Analytics Applications Suite, see the *Oracle Business Intelligence Applications Installation Guide* for information about this screen.

A.3.1 Specifying Connection Credentials for Oracle Databases and Oracle Databases Enabled for Edition-Based Redefinition

For Oracle databases and Oracle databases enabled for edition-based redefinition, specify the following connection credentials:

Table A–2 Oracle Database Connection Credentials

Field	Description
Host Name	Enter the name of the server where your database is running. Use the following format: examplehost.exampledomain.com For Oracle RAC databases, specify the VIP name or one of the node names in this field.
Port	Enter the port number for your database. The default port number for Oracle databases is 1521.

Table A–2 (Cont.) Oracle Database Connection Credentials

Field	Description
Service Name	<p>Specify the service name for the database. Typically, the service name is the same as the global database name.</p> <p>If you are unsure what the service name for your database is, you can obtain it from the <code>SERVICE_NAMES</code> parameter in the database's initialization parameter file. If the initialization parameter file does not contain the <code>SERVICE_NAMES</code> parameter, then the service name is the same as the global database name, which is specified in the <code>DB_NAME</code> and <code>DB_DOMAIN</code> parameters.</p> <p>For Oracle RAC databases, specify the service name of one of the nodes in this field. For example:</p> <p><code>examplehost.exampledomain.com</code></p>
Username	Enter the user name for your database. The default user name is <code>SYS</code> .
Password	Enter the password for your database user.
Role	<p>Select the database user's role from the drop-down list:</p> <ul style="list-style-type: none"> ■ Normal ■ SYSDBA <p>All schemas installed on an Oracle database require the SYSDBA role. If you are creating schemas for Oracle Internet Directory (OID), you must use the user <code>SYS</code> and the SYSDBA role. For more information, see 'RCU Requirements for Oracle Databases' in the System Requirements and Specification.</p>

A.3.2 Specifying Connection Credentials for Oracle MySQL Databases

For MySQL databases, specify the following connection credentials:

Table A–3 Oracle MySQL Database Connection Credentials

Field	Description
Host Name	<p>Enter the host name, IP address, or complete server name in <code>host\server</code> format of the server where your database is running.</p> <p>For Oracle RAC databases, specify the VIP name or one of the node names in this field.</p>
Port	Enter the port number for your database.
Database Name	Specify the name of your database.
Username	Specify the name of a user with DBA or SYSDBA privileges.
Password	Enter the password for your database user.

A.3.3 Specifying Connection Credentials for Microsoft SQL Server Databases

For Microsoft SQL Server databases, specify the following connection credentials:

Table A–4 Microsoft SQL Server Database Connection Credentials

Field	Description
Unicode Support	<p>Select Yes or No from the drop-down list.</p> <p>NOTE: Oracle SOA Infrastructure schemas are created with Unicode support (database tables created with <code>NVARCHAR</code>) only, regardless of the option selected in this field.</p>

Table A-4 (Cont.) Microsoft SQL Server Database Connection Credentials

Field	Description
Server Name	Enter the host name, IP address, or complete server name in host\server format of the server where your database is running.
Port	Enter the port number for your database.
Database Name	Specify the name of your database.
Username	Enter the user name for your database. The user must have SYSDBA or DBA privileges.
Password	Enter the password for your database user.

A.3.4 Specifying Connection Credentials for IBM DB2 Databases

For IBM DB2 databases, specify the following connection credentials:

Table A-5 IBM DB2 Database Connection Credentials

Field	Description
Server Name	Enter the host name, IP address, or complete server name in host\server format of the server where your database is running.
Port	Enter the port number for your database.
Database Name	Specify the name of your database.
Username	Specify the name of a user with DB Owner privileges. The default user name for IBM DB2 databases is db2admin.
Password	Enter the password for your database user.

A.4 Select Components

Use this screen to select the component schemas you want to create or drop.

The following topics are covered in this section:

- [Creating Database Users for IBM DB2 Databases](#)
- [Creating Prefixes](#)
- [Selecting Components and Dependencies](#)
- [Specifying Custom Schema Names](#)
- [Checking Schema Prerequisites](#)

Note: If you are creating schemas, you must remember the prefix and schema names for the components you are installing; you will need this information during the configuration phase of Fusion Middleware product installation. Oracle recommends that you write these values down.

- [Dropping Schemas](#)

Note: If you are running the RCU for Oracle Business Analytics Applications Suite, see the *Oracle Business Intelligence Applications Installation Guide* for information about this screen.

A.4.1 Creating Database Users for IBM DB2 Databases

IBM DB2 authenticates its database users using equivalent operating system users. Therefore, prior to running RCU, one operating system user must be created for each schema. The operating system user name must match the schema owner name and must contain only lowercase letters; no all-uppercase or mixed-case names are allowed. For example, if you create a schema named `DEV_ODI` using RCU, then the operating system user must be named `dev_odi` (all lowercase letters).

A.4.2 Creating Prefixes

Prefixes are used to create logical groupings of schemas in a database. For example, if you want to create two versions of the MDS schema in the database, you can use different prefixes to uniquely identify each one (for example, `TEST_MDS` and `PROD_MDS`). Note that the prefix name and schema name are separated by an underscore (`_`) character.

Note: The Oracle Internet Directory (ODS) component cannot be prepended with a custom prefix; there can only be one repository for this component per database.

If you want to create a new prefix for your schemas, select **Create a New Prefix** and specify a new prefix name in the field. The prefix name must be a minimum of one character in length and cannot exceed 12 alphanumeric characters (0-9, a-z, or A-Z) in length (not including the underscore character). Prefixes should not start with a number. No whitespace or special characters are allowed.

Note: For IBM DB2 databases, prefixes are limited to four characters in length (not including the underscore character).

The default new prefix is `DEV`. If `DEV` already exists as a prefix, then `DEV1` is used; if `DEV1` exists, then `DEV2` is the default, and so on.

Use existing prefixes to add additional components to an existing repository in the database. To use an existing prefix, select **Select an Existing Prefix** and choose a prefix from the drop-down list.

A.4.3 Selecting Components and Dependencies

When you select a component, any other components that may be required by the component you select are also selected. For example, if you select **SOA and BPM Infrastructure**, then all schemas in this category are selected along with the **Metadata Services** schema. The **Metadata Services** schema is required by each component in **SOA and BPM Infrastructure**.

If a component has a plus sign (+) next to its name, then there are sub components available. Click on the plus sign (+) to expand the category to view all sub components. If you want to select a component with all its subcomponents, click on the top-most box with the plus sign (+).

A.4.4 Specifying Custom Schema Names

Click on the name of any schema in the "Schema Owner" column to change the name of the schema. Schema names can only contain alphanumeric characters (0-9, a-z, or A-Z) and are case-sensitive.

Note: The Oracle Internet Directory (ODS) component cannot be prepended with a custom prefix; there can only be one repository for this component per database.

A.4.5 Checking Schema Prerequisites

Click **Next** when you are finished specifying your prefix, schema names, and selecting components. A screen indicating the progress of component prerequisite checking appears. If an error occurs during the prerequisite checking, the error message(s) appear in the Messages field on the Select Components screen.

A.4.6 Dropping Schemas

To remove schemas from the database:

1. Select the prefix associated with the schema(s) you want to drop.
2. select the component(s) whose schemas you want to drop.

A.5 Schema Passwords

Use this screen to specify the password for your schemas.

There are three ways to specify schema passwords; they are described in the following table:

Table A-6 Options for Specifying Schema Passwords

Option	Description
Use same password for all schemas	Select this option if you want to use a single password for all schemas and their auxiliary schemas. In the Password field, enter your password. Enter your password again in the Confirm Password field.
Use main schema passwords for auxiliary schemas	Select this option if you want to specify different passwords for the main schemas, but still have the same password used for their respective auxiliary schemas. If you select this option, only the main schemas will be visible in the table. For each schema, you must enter each schema's password in the Password column in the table, and enter the same password in the Confirm Password column.
Specify different passwords for all schemas	Select this option if you want to specify unique passwords for the main schemas and auxiliary schemas. If you select this option, all main schemas and auxiliary schemas will be visible in the table. For each schema and auxiliary schema, you must enter the password in the Password column in the table, and enter the same password in the Confirm Password column.

Note: You must remember the passwords you enter on this screen; you will need this information during the configuration phase of Fusion Middleware product installation. Oracle recommends that you write these values down.

A.6 Custom Variables

Use this screen to specify additional configuration information required by the components during runtime.

This screen only appears if you selected a component on the [Select Components](#) screen that supports custom variables:

- [Specifying Custom Variables for Oracle Business Intelligence Applications](#)
- [Specifying Custom Variables for Master and Work Repository \(ODI\)](#)
- [Specifying Custom Variables for Oracle WebCenter Portal's Activity Graph and Analytics](#)

A.6.1 Specifying Custom Variables for Oracle Business Intelligence Applications

The RCU uses .dmp files to create the required schemas. Before you perform the action in this screen, you must copy the .dmp files for each schema to a directory with global write access on the appropriate database server host machine. (RCU writes log files to this directory). The .dmp files are located in BIA_RCU_HOME\rcu\integration\biapps\schema.

In the Value field in the Custom Variables screen, for each schema enter the directory path of the folder that contains the .dmp file.

Note: Do not include the name of the .dmp file in the directory path.

A.6.2 Specifying Custom Variables for Master and Work Repository (ODI)

Specify the following for the Master and Work Repository Custom Variables:

Table A-7 *Master and Work Repository Custom Variables*

Variable	Description
Master Repository ID	A specific ID for the new Master Repository. Master Repository ID values must be between 0 and 999. Default value is 001.
Supervisor PAssword	Password of the supervisor user. You must confirm this password on the following line.

Table A-7 (Cont.) Master and Work Repository Custom Variables

Variable	Description
Work Repository Type	Specify how the Work Repository will be used: <ul style="list-style-type: none"> ■ Use Development (D) for creating a development repository. This type of repository allows management of design-time objects such as data models and projects (including interfaces, procedures, etc.) A development repository also includes the run-time objects (scenarios and sessions). This type of repository is suitable for development environments. ■ Use Execution (E) for creating an execution repository: This type of repository only includes run-time objects (scenarios, schedules and sessions). It allows launching and monitoring of data integration jobs in Operator Navigator. Such a repository cannot contain any design-time artifacts. Designer Navigator cannot be used with it. An execution repository is suitable for production environments.
Work Repository ID	A specific ID for the new Work Repository. Default value is 001.
Work Repository Name	A unique name for the Work Repository (for example: DEVWORKREP1).
Work Repository Password	(Optional) - Provide a password for the Work Repository. If you provide a password, you must confirm the password on the following line.

A.6.3 Specifying Custom Variables for Oracle WebCenter Portal's Activity Graph and Analytics

Specify **Y** if you want to install Activity Graph and Analytics with database partitioning enabled, or **N** if you do not want to enable database partitioning.

A.7 Map Tablespaces

Use this screen to specify your tablespace mapping information.

This screen only appears if you selected the **Create** option on the [Create Repository](#) screen. The following topics are covered:

- [Default Tablespace Mappings](#)
- [Changing Default and Temporary Tablespaces](#)
- [Viewing and Changing Additional Tablespaces](#)
- [Managing Tablespaces and Datafiles](#)

Click **Next** when you are finished with your tablespace information. A screen will appear asking you to confirm the creation of tablespaces for any new schemas.

Note: RCU only creates tablespaces for those components associated with RCU.

After you click **OK** to continue, a screen indicating the progress of the tablespace creation will appear.

A.7.1 Default Tablespace Mappings

The default tablespace mapping for each component is shown in "Repository Creation Utility Schemas, IDs, and Tablespaces" in the *Oracle Fusion Middleware Repository Creation Utility User's Guide*.

In the Default Tablespace and Temp tablespace columns, you can click on the tablespace cell to select from a list of available additional tablespace names.

Note: OID tablespace names cannot be user specified.

A.7.2 Changing Default and Temporary Tablespaces

To change the default tablespace for a component, select the tablespace name in the "Default Tablespace" column, then select the tablespace name you want to use from the drop-down list. You can have your components use as many or as few tablespaces as desired to suit your configuration.

To change the temporary tablespace for a component, select the tablespace name in the "Temp Tablespace" column, then select the tablespace name you want to use from the drop-down list.

A.7.3 Viewing and Changing Additional Tablespaces

Some components have additional tablespaces associated with their schemas. If this is the case, the **Additional Tablespaces** button will appear on this screen. If none of the selected components have additional tablespaces, then this button will not appear.

To view additional tablespaces associated with the selected components, click the **Additional Tablespaces** button.

To change the tablespace you want to use for a component, click in the "Tablespace Name" column and select the tablespace you want to use from the drop-down list.

A.7.4 Managing Tablespaces and Datafiles

To manage your tablespaces and datafiles, click the **Manage Tablespaces** button.

The following topics are covered in this section:

- [Adding, Modifying, and Removing Tablespaces](#)
- [Adding, Modifying, and Removing Datafiles](#)

A.7.4.1 Adding, Modifying, and Removing Tablespaces

Only tablespaces that will be created by RCU can be modified or removed. Tablespaces that existed before RCU was launched are visible on this screen but are grayed out and cannot be modified or removed.

Only tablespaces that are used by a component are created. You can specify a new tablespace here, but unless it is actually used by a component it will not be created.

To modify a tablespace, select the tablespace name on the left-hand portion of the screen, and edit the fields as described in the following table:

Table A–8 Modifying a Tablespace

Field	Description
Name	Edit the tablespace name this field to change the name of your tablespace.
Type	Specify whether you want this tablespace to be a temporary tablespace or permanent tablespace.
Block Size (KB)	Specify the block size (in Kilobytes) to be used for data retrieval.
Storage Type	Select Use Bigfile Tablespace if you want to create a bigfile tablespace; this is typically used if you have single large files instead of multiple small files. Select Use Automatic Segment Space Management if you want to use bitmaps to manage the free space within segments.

To add a tablespace, click **Add** and specify the same details as above (for modifying a tablespace) for your new tablespace.

To remove a tablespace, select the tablespace name from the navigation tree, then click **Remove**. This tablespace will not get created.

A.7.4.2 Adding, Modifying, and Removing Datafiles

In the Datafiles section, specify the datafiles that make up the selected tablespace. Select one of the following for more information:

- [Adding a Datafile](#)
- [Modifying a Datafile](#)
- [Deleting a Datafile](#)

A.7.4.2.1 Adding a Datafile To add a datafile, click the icon with the plus sign (+).

The Add Datafile screen appears.

Provide the information described in the following table:

Table A–9 Adding a Datafile

Field	Description
File Name	Specify the name of the datafile. NOTE: Datafile names must be less than 30 characters in length, and names with a dash or hyphen (-) character are not permitted.
File Directory	Specify the location where this datafile will reside.
Size	Specify the initial size of the datafile. Use the drop-down list to specify the size in kilobytes (KB), megabytes (MB), or gigabytes (GB).
Automatically extend datafile when full (AUTOEXTEND)	Select Automatically extend datafile when full (AUTOEXTEND) if you want to automatically extend the size of your datafile when it becomes full. In the "Increment" field, specify the size by which your datafile should be increased each time it becomes full. Use the drop-down list to specify the size in kilobytes (KB), megabytes (MB), or gigabytes (GB). If you want to limit maximum size of the datafile, specify this value in the "Maximum Size" field.

A.7.4.2.2 Modifying a Datafile To modify or edit a datafile, select the icon next to the datafile name you want to edit, then click the icon with the pencil.

The Edit Datafile screen appears:

Provide the information described in the following table:

Table A-10 Modifying a Datafile

Field	Description
File Name	Specify the name of the datafile. NOTE: Datafile names must be less than 30 characters in length, and names with a dash or hyphen (-) character are not permitted.
File Directory	Specify the location where this datafile resides.
Size	Specify the initial size of the datafile. Use the drop-down list to specify the size in kilobytes (KB), megabytes (MB), or gigabytes (GB).
Automatically extend datafile when full (AUTOEXTEND)	Select Automatically extend datafile when full (AUTOEXTEND) if you want to automatically extend the size of your datafile when it becomes full. In the "Increment" field, specify the size by which your datafile should be increased each time it becomes full. Use the drop-down list to specify the size in kilobytes (KB), megabytes (MB), or gigabytes (GB). If you want to limit maximum size of the datafile, specify this value in the "Maximum Size" field.

A.7.4.2.3 Deleting a Datafile To delete a datafile, select the icon next to the datafile name you want to delete, then click the icon with the "X".

A.8 Summary

This screen provides a summary of the actions that are about to be performed.

Review the information on this screen, and click **Create** to begin schema creation, or **Drop** to begin schema removal.

A screen will appear indicating the progress of the actions being performed.

A.9 Completion Summary

This screen provides a summary of the actions that were performed.

The log file names for each component that are visible in the "Logfile" column. The main RCU log and component log files are written to the following directory on UNIX operating systems:

```
RCU_HOME/rcu/log/logdir.date_timestamp
```

On Windows operating systems:

```
RCU_HOME\rcu\log\logdir.date_timestamp
```

If there were any problems encountered during schema creation, you can troubleshoot the issue using the log files.

If errors are encountered during a Create operation, or if a Create operation fails for any component, the **Cleanup for failed components** checkbox appears on this page and is selected by default. If selected, RCU will perform cleanup operations for the component that failed during the Create operation. If you choose not to select this checkbox, you can cleanup the failed component at a later time by performing a Drop operation for the failed component(s).

Installer Screens Common to All Oracle Fusion Middleware Suites

The following sections describe the installation screens that are common to all the Oracle Fusion Middleware product installers.

- Specify Inventory Location
- Inventory Location Confirmation
- Welcome
- Prerequisite Checks
- Security Updates
- Software Updates
- Installation Location
- Application Server
- Summary
- Installation Progress
- Configuration Progress
- Complete

B.1 Specify Inventory Location

If this is your first Oracle installation on a host that is running UNIX or Linux system software, you must use this screen to specify the location of the Oracle inventory directory.

The inventory directory is used by the installer to keep track of all Oracle products installed on the computer.

The following table describes the fields on this page.

Field	Description
Inventory Directory	<p>Use this field to identify the complete path for the new Oracle inventory directory that will be created.</p> <p>By default, the installer assumes you will create the Oracle inventory in a directory, based on the following environment variable and path:</p> <pre>\$USER_HOME/oraInventory</pre> <p>If this location is not appropriate for your environment, enter a new path for the location of the inventory directory.</p> <p>Note that the inventory directory will eventually contain many files, including log files for each Oracle software installation you perform on this machine.</p>
Operating System Group Name	<p>From the Operating System Group drop-down menu, select the group whose members you want to grant access to the inventory directory; all members of this group will be able to install products on this machine.</p>

B.2 Inventory Location Confirmation

This dialog box appears only on UNIX systems. It prompts you to run a shell script that will create the Oracle inventory in the location you specified on the Inventory Location screen.

You must have root privileges to run the script.

If you do not have root privileges, but you want to continue with the installation, select **Continue Installation with Local Inventory**.

Note that the preferred method of managing your Oracle installations is to create a central inventory directory with the shell script. If you create a central inventory directory, then the next time you install any Oracle software on this machine, the installer will automatically locate and update the inventory without prompting you. The installer uses the inventory to identify what Oracle software is installed. It also saves all your installation log files to the inventory location.

If you do not run the script and use a local inventory, a local copy of the inventory is created for this specific installation only. If you later run the installer to install additional Oracle software, the installer will again prompt you to create an inventory.

B.3 Welcome

This page introduces you to the Oracle Fusion Middleware installer and provides two important pieces of information:

- A navigation pane on the left that summarizes the tasks the installer will help you complete. Each item in the navigation pane represents a specific installer screen that will prompt you for information required to install the software.
- Information about any prerequisites you might need to perform before continuing with the installation.

Review the information on this screen carefully to be sure you have performed all the necessary prerequisites.

If you are not sure about any of the prerequisite tasks, refer to the *Oracle Fusion Middleware Installation Planning Guide*, as well as the for the specific Oracle Fusion Middleware software you are about to install.

B.4 Prerequisite Checks

This screen analyzes the host computer to ensure that specific operating system prerequisites have been met.

If any of the prerequisite checks fail, then a short error message appears in the bottom portion of the screen. Fix the error and click **Retry** to try again. If you want to ignore the error or warning messages and continue with the installation, click **Continue**.

Click **Abort** to stop prerequisite checking for all components.

More About System Requirements and Prerequisites

Note that before performing any installation you should read the system requirements and certification documentation to ensure that your environment meets the minimum installation requirements for the products you are installing. Both of these documents are available on Oracle Technology Network (OTN).

The system requirements document covers information such as hardware and software requirements, minimum disk space and memory requirements, and required system libraries, packages, or patches:

<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-requirements-100147.html>

The certification document covers supported installation types, platforms, operating systems, databases, JDKs, and third-party products:

<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html>

About 32-Bit and 64-Bit Installers

Some Oracle Fusion Middleware products provide separate installers for 64-bit and 32-bit operating systems. For those products, be sure to use the appropriate installer for the operating system you are using.

For more information, refer to the information on this topic in the *System Requirements and Specifications* on the Oracle Technology Network (OTN):

<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-requirements-100147.html>

B.5 Security Updates

Use this screen to enter your My Oracle Support account information so you can receive the latest product information and security updates via your My Oracle Support account.

The following table describes the fields on this screen.

Element	Description
Email	Enter the email address you used to register with My Oracle support.
I wish to receive security updates via My Oracle Support	Select this check box to indicate that you have a My Oracle Support account and that you want to receive updates via My Oracle Support.
My Oracle Support Password	Enter the password for your My Oracle Support account.

If you do not want to register for security updates or if you do not have a My Oracle Support account, then leave all the fields on this screen empty. You will be prompted to confirm your selection; click **Yes** in the dialog box.

B.6 Software Updates

Use this screen to quickly and easily search for the latest software updates, including important security updates, via your My Oracle Support account.

The following table describes the fields on this screen.

Element	Description
Skip Software Updates	Select this option to skip this screen. The installer will not check for updates that might be applicable to the current product installation.
Search My Oracle Support for Updates	<p>If you have a My Oracle Support account, then select this option to have the installer automatically search My Oracle Support for software updates that apply to the software products are about to install.</p> <p>Enter your My Oracle Support account name and password, and then click Search for Updates.</p> <p>The installer automatically downloads applicable software updates from My Oracle Support.</p> <p>Before you search for update, you can test your login credentials and the connection to My Oracle Support by clicking Test Connection. Click Proxy Settings to configure a proxy server if one is required.</p>
Search Local Directory for Updates	<p>Select this option if you already downloaded the latest software updates and you want the installer to search a local directory for updates applicable to the products you are about to install.</p> <p>When you select this option, the installer displays an additional field and Browse button that you can use to identify the local directory where your updates are located.</p>

B.7 Installation Location

Use this screen to identify where you want to install your Oracle Fusion Middleware software.

The following table describes the fields that might appear on this page.

Important Notes:

- Depending upon the type of installation you are performing one or more of the fields shown here might not appear on this screen. Each Fusion Middleware component has different requirements for determining where the software is installed.
- If you are installing a Patch Set, then you must specify an existing Middleware home that contains the Oracle home that will be patched.
- If you are performing an installation on a Windows operating system, be sure that your directory paths are valid and do not contain double backslashes (\\).

Field	Description
Oracle Middleware Home Location	<p>Use this field to specify the location of your Oracle Middleware home directory.</p> <ul style="list-style-type: none"> ■ If you are using Oracle WebLogic Server as your application server: In the Oracle Middleware Home field, specify the absolute path to your existing Oracle Middleware home directory; this is the directory that was created when you installed Oracle WebLogic Server. If you do not know the full path to your Middleware home, you can click Browse to select an existing directory in your system. ■ If you are using IBM WebSphere as your application server: In the Oracle Middleware Home field, specify the absolute path to the directory you want to use as the Middleware home. This directory has no relation to the location of your WebSphere installation. If you specify a directory location that does not already exist, the installer will create the directory for you.
Oracle Home Directory	<p>The Oracle home directory is where your products will be installed. All software binaries will reside in this directory, and no runtime process can write to this directory.</p> <p>Specify the directory inside the Oracle Middleware home where you want to install your products, but note the following:</p> <ul style="list-style-type: none"> ■ If you specify a new directory, it will be created inside the Middleware home. ■ If you specify a directory that already exists (for example, you are reinstalling due of an incomplete previous installation), then it must be inside the Oracle Middleware home. ■ If you are using the Oracle Fusion Middleware Application Developer installer, then all the binaries are installed into the Oracle Common home. ■ If you are using a Patch Set installer, the installer will verify that the Oracle home you selected is compatible with the patch set installer you have selected. For example, you cannot patch an Oracle Identity Management Oracle home with the Oracle SOA Suite patch set installer.
WebLogic Server Location	<p>The directory name for your WebLogic Server home. This directory will automatically be created inside the Middleware home. The default name for this directory is "wlserver_" followed by the version number. For example, <code>wlserver_10.3</code>.</p>
Oracle Instance Location	<p>Enter the absolute path to the location where you want to create the Oracle Instance directory. The installer creates the Oracle Instance directory using the location you enter in this field and using the name you enter in the Oracle Instance Name field. Do not enter a path to an existing directory that contains files—if you enter a path to an existing directory, that directory must be empty.</p> <p>The installer installs the component's configuration files and runtime processes in the Oracle Instance directory. Runtime components will write only to this directory. You can identify any location on your system for the Oracle Instance directory—it does not have to reside inside the Oracle Middleware Home directory.</p>

Field	Description
Oracle Instance Name	<p>Enter a name for the Oracle Instance directory. The installer uses the name you enter in this field to create the Oracle Instance directory at the location you specify in the Oracle Instance Location field. This directory is commonly referred to as ORACLE_INSTANCE.</p> <p>Instance names are important because Oracle Fusion Middleware uses them to uniquely identify instances. If you install multiple Oracle Fusion Middleware instances on the same computer, for example, an Oracle Identity Management instance and an Oracle WebLogic Server instance, you must give them different names.</p> <p>The name you enter for the Oracle Instance directory must:</p> <ul style="list-style-type: none"> ■ Contain only alphanumeric and underscore (_) characters ■ Begin with an alphabetic character (a-z or A-Z) ■ Consist of 4-30 characters ■ Not contain the host name or IP address of the computer
Location	<p>If you are installing the Oracle Discoverer Desktop or Oracle Discoverer Admin applications, use this field to enter the location where the applications will be installed.</p> <p>Enter the absolute path for the Oracle Home location. This is the directory where the software binaries will reside; no runtime processes may write to this directory. The specified directory must be an empty directory or an existing Oracle Home location.</p>

For more information about the Middleware home and the Oracle home requirements, see "Oracle Fusion Middleware Directory Structure and Concepts" in the *Oracle Fusion Middleware Installation Planning Guide*.

B.8 Application Server

Use this screen to select the application server you want to use for this installation.

- If the installer detects a Middleware home with Oracle WebLogic Server installed, then this is the application server that will be used. All other fields in this screen will be inactive.
- If the installer detects a Middleware home without an Oracle WebLogic Server installed, you must select one of the application server options and then provide its location in the Application Server Location field.
- If the installer does not detect a Middleware home directory, the "WebLogic Server" option will be inactive. You must select "WebSphere" and then provide the location of your IBM WebSphere in the Application Server Location field.

B.9 Summary

This screen summarizes the selections you have made during the installation or configuration session.

Note that some Oracle Fusion Middleware installers allow you to install and configure the products as part of the installation process. As a result, the installation summary page is sometimes referred to as the configuration summary page.

In either case, this screen provides the following information:

- The location of your installation
- How much disk space will be used for the installation

- The applications you have selected for installation

Review the information on this screen to verify the options you have selected before the installation or configuration begins.

If you want to make any changes to the configuration before starting the installation or configuration, use the navigation pane to select the installer screen you want to return to and edit.

If you want to save this installation or configuration to a text file (called a response file), click **Save**. The resulting response file can be used later if you choose to perform the same installation from the command line. See the section on "Silent Installation" in your component-specific for more information.

B.10 Installation Progress

This screen shows you the progress of the installation.

If you want to quit before the installation is completed, click **Cancel**. Doing so will result in a partial installation; the portion of the software that was installed on your system before you canceled the installation will remain on your system, and you will have to remove it manually.

B.11 Configuration Progress

This screen shows you the progress of your software configuration.

This screen is divided into the following main parts:

- The navigation pane on the left, which shows you where you are in the overall installation and configuration process.
- A list of configuration tools that can be expanded and collapsed to show either the overall progress of the configuration or a more detailed listing of the progress of each configuration tool.
- A set of control buttons (Abort, Retry, and Continue), which you can use in the event of a configuration tool failure.
- The name and location of the configuration log file.
- A summary of the results for each configuration tool, which includes any error messages generated by the failure of a configuration tool.

If an error occurs while any of the configuration tools are running, the installer identifies the configuration tool, stops, and alerts you of the problem. You can do the following:

- Expand the list in the results section of the page, so you can see the error message that was generated.
- Leave the installer running and use another terminal window to review the configuration log file.
- Refer to the Installation documentation for more information.
- If possible, address the problem and use the control buttons to determine your next action, as described in the following table.

Element	Description
Abort	Click this button to abort the installation and configuration of the Fusion Middleware software. This action closes the installer.
Retry	Click this button to retry the failed configuration tool. If you were able to identify and address the error, then use this button to try the configuration tool again.
Continue	Click this button to ignore the error and continue with the rest of the configuration tools. This is the equivalent of skipping the configuration tool that generated the error.

B.12 Complete

This screen summarizes the installation that was just completed.

If you want to save this summary information to a text file for future reference, click **Save**.

For some Oracle Fusion Middleware installers, you can also save the configuration information to a text file.

Click **Finish** to dismiss the screen and end your installation session.

Oracle BI Applications Installation and Configuration Screens

This appendix describes the options available when you are installing and configuring Oracle BI Applications.

- Welcome (When Running Business Analytics Applications Suite Installer)
- Specify Installation Location (When Running Business Analytics Applications Suite Installer)
- Welcome (When Running the configApps.bat/sh File)
- Extend BI Domain
- Specify Installation Location (When Running the configApps.bat/sh File)
- Configure Components
- RPD Encryption Password
- BI Applications Administrator User
- MDS Schema
- BI Applications Components Repository Schema
- Business Analytics Warehouse Schema
- BI Applications ODI Repository Schema
- Configure Ports

C.1 Welcome (When Running Business Analytics Applications Suite Installer)

This screen introduces you to the Oracle Business Analytics Applications Suite installer. The navigation pane on the left summarizes the tasks the installer will help you complete. Each item in the navigation pane represents a specific installer screen that will prompt you for information required to install the software.

Before you run the Business Analytics Applications Suite installer, you must complete the following prerequisites:

- Install Oracle Business Intelligence Enterprise Edition 11g
- Install Oracle Data Integrator

For more information on installing the prerequisites for Business Analytics Applications Suite installer, see the section titled "Installing Prerequisites for Oracle BI Applications," in *Oracle Business Intelligence Applications Installation Guide*.

C.2 Specify Installation Location (When Running Business Analytics Applications Suite Installer)

Use this screen to specify where the Oracle Fusion Middleware home is installed.

The following table describes the fields on this screen.

Field	Description
Oracle Middleware Home	Specify the path to the directory for an existing Oracle Middleware home where Oracle BI EE has been installed. If you do not know the location of the directory, click Browse to locate the directory on your system.
Oracle Home Directory	Specify the Oracle home for BI, for example, Oracle_BI1. Do not specify any other Oracle home or choose to create a new one. The Oracle home for Business Intelligence directory is where the software binary files for Oracle BI Applications will be installed.

If you are installing on a Microsoft Windows operating system:

- Ensure that the directory paths are valid and do not contain double backslashes (\).

C.3 Welcome (When Running the configApps.bat/sh File)

This screen introduces you to the Oracle Business Analytics Applications Suite configuration process.

Before you run the configApps.bat/sh file, you must complete the following prerequisites:

- Run the Business Analytics Applications Suite installer
For instructions on running the installer, see the section titled "Installing Oracle BI Applications" in *Oracle Business Intelligence Applications Installation Guide*.
- Apply Fusion Middleware platform patches.
For instructions on applying the patches, see the section titled "Applying Platform Patches" in *Oracle Business Intelligence Applications Installation Guide*.
Do not proceed with the configuration unless you have applied the platform patches. If you have not applied the patches, exit the configuration utility and apply the patches. Then, re-run the configApps.bat/sh file.

C.4 Extend BI Domain

Use this screen to specify details for the WebLogic Administration Server domain.

The following table describes the fields on this screen.

Field	Description
Host Name	The host name of the computer on which the WebLogic Administration Server domain exists. This field is read-only.
Port	Specify the port number over which the WebLogic Administration Server domain communicates. The default is 7001.

Field	Description
User Name	Specify the user name for logging into the WebLogic Administration Server.
User Password	Specify the password for logging into the WebLogic Administration Server.

C.5 Specify Installation Location (When Running the configApps.bat/sh File)

The following table describes the fields on this screen.

Field	Description
Middleware Home	The path to the directory for an existing Oracle Middleware Home where Oracle BI EE has been installed. The value in this field is read-only.
Oracle Home	The Oracle home for BI, which is the location where Oracle BI EE, and Oracle BI Applications files are installed. The value in this field is read-only.
WebLogic Server Home	The directory name for the WebLogic Server. The installer automatically creates this directory <i>inside</i> the Oracle Middleware home. The default name for this directory is "wlserver_" followed by the version number. For example, wlserver_10.3. The value in this field is read-only and is the host name you specified in the Middleware Home field.
Domain Home	The home directory for the domain associated with the Oracle Business Intelligence system. The value in this field is read-only.
Instance Home	The path to the Oracle Instance directory. The installer installs component configuration files and runtime processes in the Oracle Instance directory. Runtime components write to this directory only. The directory that you identify for the Oracle Instance can be located anywhere on your system, and does not need to be inside the Oracle Middleware home. The value in this field is read-only.
Instance Name	The name of the Oracle Business Intelligence instance. By default, the location is based on the value in the Instance Home field. This directory is commonly referred to as ORACLE_INSTANCE. The value in this field is read-only.

If you are installing on a Microsoft Windows operating system:

- Ensure that the directory paths are valid and do not contain double backslashes (\).

For more information about the Middleware home and the Oracle home requirements, see "Oracle Fusion Middleware Directory Structure and Concepts" in *Oracle Fusion Middleware Installation Planning Guide*.

C.6 Configure Components

Use this screen to select the components that you need to configure.

To deploy Oracle BI Applications, select:

- **BI Application Components**

C.7 RPD Encryption Password

Use this screen to specify the password used to encrypt the Oracle BI Applications RPD.

The following table describes the fields on this page.

Field	Description
RPD Password	Specify the password used to encrypt the RPD.
Confirm RPD Password	Confirm the password used to encrypt the RPD.

C.8 BI Applications Administrator User

Use this screen to specify the BI Applications Administrator user details. This user will be created in the Oracle WebLogic Server embedded LDAP. Note the credentials you enter for this user. This user has full access to Oracle BI Applications Configuration Manager and to the Oracle Data Integrator repository for Oracle BI Applications.

The following table describes the fields on this page.

Field	Description
Username	Specify a username for the Oracle BI Applications Administrator.
Password	Specify a password for the Oracle BI Applications Administrator.
Confirm Password	Confirm the password.

C.9 MDS Schema

Use this screen to specify connection details for the MDS schema.

The following table describes the fields on this screen.

Field	Description
Database Type	The type of database that hosts the MDS schema. The only supported database type is Oracle.
Connect String	The connect string used to access the MDS schema.
MDS Schema Username	The schema name for the MDS schema.
MDS Schema Password	The password for the MDS schema.

C.10 BI Applications Components Repository Schema

Use this screen to specify connection details for the Oracle BI Applications Components Repository.

The following table describes the fields on this page.

Field	Description
Database Type	Select the type of database that hosts the Oracle BI Applications Components Repository schema. The only supported database type is Oracle.

Field	Description
Connect String	Specify the connect string used to access the Oracle BI Applications Components Repository schema. Use the format: <i>host:port:service_name</i>
BIA Components Repository Schema Username	Specify the schema name for the Oracle BI Applications Components Repository schema.
BIA Components Repository Schema Password	Specify the password for the Oracle BI Applications Components Repository schema.

C.11 Business Analytics Warehouse Schema

Use this screen to specify connection details for the Business Analytics Warehouse schema.

The following table describes the fields on this page.

Field	Description
Database Type	Specify the type of database that hosts the Business Analytics Warehouse schema. The only supported database type is Oracle.
Connect String	Specify the connect string used to access the Business Analytics Warehouse schema. Use the format: <i>host:port:service_name</i>
Business Analytics Warehouse Schema Username	Specify the schema name for the Business Analytics Warehouse schema.
Business Analytics Warehouse Schema Password	Specify the password for the Business Analytics Warehouse schema.

C.12 BI Applications ODI Repository Schema

Use this screen to specify connection details for the Oracle BI Applications ODI Repository schema.

The following table describes the fields on this page.

Field	Description
Database Type	Specify the type of database that hosts the ODI Repository schema. The only supported database type is Oracle.
Connect String	Specify the connect string used to access the ODI Repository schema. Use the format: <i>host:port:service_name</i>
ODI Repository Schema Username	Specify the schema name for the ODI Repository schema.
ODI Repository Schema Password	Specify the password for the ODI Repository schema.

C.13 Configure Ports

Use this screen to configure the ports for the Oracle Business Intelligence system.

The following table describes the options on this screen.

Field	Description
Auto Port Configuration	Select this option if you want Oracle Business Analytics Applications Suite installer to configure the ports for you.
Specify Ports Using Configuration File	Select this option to use an existing configuration file to configure the ports. Optionally, click Browse to specify its location. Click View/Edit File to view or edit the file. The sample configuration file is named staticport.ini and is provided in the Disk1\stage\Response directory of the Business Analytics Applications Suite installer.

Generating DDL and Assigning Tablespaces to Tables and Indexes

This appendix describes how to generate DDL to deploy Business Analytics Warehouse tables and how to assign tablespaces to tables and indexes.

This appendix contains the following topics:

- Section D.1, "Overview"
- Section D.2, "Generating the Business Analytics Warehouse DDL"
- Section D.3, "Patching Oracle BI Applications"
- Section D.4, "Assigning Tablespaces"

D.1 Overview

The Business Analytics Warehouse tables are automatically deployed during the installation process when the Business Analytics Applications Suite Repository Creation Utility (RCU) executes a shipped DDL script. The RCU does not prompt for which tablespace to assign to the individual tables and related indexes nor does it provide a mechanism for you to alter the shipped DDL. To introduce changes to the Business Analytics Warehouse data model, you use ODI to generate a new DDL script.

You may want to regenerate the Business Analytics Warehouse DDL for the following reasons:

- You may want to modify the Business Analytics Warehouse, either by modifying existing tables or creating new ones.
- You may want to have separate development environments. In this case you will need to use ODI to generate the DDL to be executed in these environments to deploy the Business Analytics Warehouse tables rather than run the RCU for each environment.
- The default tablespace assigned to the Business Analytics Warehouse database user is used for all tables and indexes when those objects are created by the RCU. You may want to assign different tablespaces to the DW tables other than the default tablespace associated with the database user.
- If a patch or upgrade is applied that alters an ODI data store or introduces a new ODI data store, the corresponding database table will need to be altered or created.

You can make changes directly in the database but these changes need to be synchronized with the ODI Repository. This is done by running the Oracle BI Applications reverse knowledge module (RKM) to bring in the changes into ODI. If

this RKM is not run, ODI will not be aware of these changes, which can lead to problems when populating the affected warehouse table.

D.2 Generating the Business Analytics Warehouse DDL

Follow this procedure to generate Business Analytics Warehouse DDL.

To generate Business Analytics Warehouse DDL:

1. Launch ODI Studio, and display the Designer navigator.
2. In the Projects editor, expand the following folders: Components, DW, Oracle, Generate DW DDL.
3. Execute the GENERATE_DW_DDL scenario:

Specify the following information:

Option	Description
CREATE_SCRIPT_FILE	If set to True, this will create a .sql file with the DDL script. This is useful to see what the changes are. If no value is provided for the SCRIPT_LOCATION option, the procedure will create a file in the oracledi directory named biappsddl.sql.
REFRESH_MODE	FULL or INCREMENTAL FULL will generate the DDL for the entire data warehouse using CREATE statements. The Table Mask option is ignored. INCREMENTAL will compare the ODI data stores with the tables in the database. This option should be used with the Table Mask option because this process can take a very long time comparing the entire data warehouse.
CHARCLAUSE	Provided for Unicode support. If set to True, the CHAR clause will be included in the DDL.
RUN_DDL	If set to True, the DDL will run against your warehouse.
SCRIPT_LOCATION	If you are creating a script, this field indicates the path where the script will be created.
TABLE_MASK	Default % will compare all tables. If you want to create DDL for a subset of tables only or just a single table, you can change this value. For instance, to create a diff script for dimension tables, you would set this value to W_%_D.

Keep the following in mind when introducing changes in ODI:

- **Full mode** generates a script that creates all tables and sequences, regardless of what may already be deployed in the database. **Incremental mode** compares the ODI and database definition of the tables and columns. Neither mode creates, modifies or drops indexes.
- **Add or modify columns:**
 - **Add column:** ODI allows duplicate column names but you will get an error when deploying the DDL to the database.
 - **Modify column:**
 - Column renaming in ODI will be treated as a drop of the existing column and a new column will be added in the database. This means any existing data

in that column is lost. The procedure works on column name. When generating the DDL, the procedure compares the database and ODI definitions of the columns. If a column has been renamed in ODI, that column will not be found in the database so it is added.

- Changes to datatype, scale, precision, nullability are supported as ALTER statements

- You should avoid altering preconfigured columns. They should introduce their own custom column if they need a change in functionality.

- Existing columns can be changed to a larger size but should not be reduced to a smaller size. Similarly, column data types can be changed to one that already accommodates existing data (CHAR to VARCHAR, DATE to DATETIME) but should not be changed to less accommodating datatype (VARCHAR to NUMBER). ODI does not prevent users from making this kind of change but when deploying the DDL, users will likely encounter issues.

- **Delete column:** You should not delete preconfigured columns. You should only delete custom columns. If a column is deleted from the ODI Repository, it will be dropped from the table using an ALTER statement. This is done by identifying those columns that exist in the database but do not exist in ODI. (Thus, renaming the column in ODI results in a drop and add statements being generated).

- **Add or modify indexes**

- **Add index:** ODI allows duplicate index names and duplicate index definitions, but you will get an error when deploying the DDL on the database.

- **Modify index:**

- Indexes are only dropped and created during the execution of a load plan. Indexes are not synchronized by this procedure.

- Changes to preconfigured indexes is fully supported. Changes to uniqueness and active/inactive are supported. The primary use case is to make a preconfigured index active or inactive

- Changes to preconfigured index names should be avoided. If a load plan previously executed and created the index, the index will continue to exist with the old name in the database. Because ODI is not aware of this index, problems may occur during the execution of the load plan.

- **Delete index:**

- You should only delete custom indexes and not preconfigured indexes.

- If you do not want a preconfigured index, you should inactivate it.

- **Add or drop a table:** You can add a new table or delete an existing table in OD.

- If a table is added in ODI and does not exist in the database, it will be added using a CREATE TABLE statement.

- If a table is deleted from ODI and still exists in the database, a DROP TABLE statement will be generated.

- You should not delete preconfigured tables.

- **Add or drop a sequence:**

You should add a sequence in ODI for new tables that includes the ROW_WID column and that follows the format <TABLE_NAME>_SEQ. You should add a

sequence in ODI for new tables that includes the SCD1_WID column and that follows the <TABLE_NAME>_S1W naming convention.

- If a sequence is added in ODI and does not exist in the database, it will be added using a CREATE SEQUENCE statement.
- Sequences deleted from ODI are not dropped from the database.

D.3 Patching Oracle BI Applications

Patching of Oracle BI Applications may require changes to database objects, such as modifying existing tables or introducing new tables. Oracle will provide a patch file that you will use to merge changes with the existing ODI Repository definition. These changes will then need to be deployed to the database. New tables, columns and indexes that you introduced are retained. Any changes you made to preconfigured tables, columns, and indexes must go through a conflict resolution process.

D.4 Assigning Tablespaces

Using the Designer navigator in Oracle Studio, you can assign default tablespaces for the data warehouse tables, such as the W_%_D and W_%_F tables, their associated indexes, and the staging tables, such as the W_%_DS and W_%_FS tables. Indexes are not created by this utility but are created during the ETL process and will reflect the tablespace assigned in ODI.

To assign tablespaces to data warehouse tables:

1. Launch ODI Studio, and display the Designer navigator.
2. In the Models editor, expand Oracle BI Applications model.
3. Edit the Oracle BI Applications model and assign the OBI Tablespace flexfields with the tablespace values to be used for these objects. All data warehouse tables and indexes will use the tablespaces defined here.
4. (Optional) Individual tables can be overridden to use a different tablespace from those assigned at the model level. Edit the particular data store and assign the OBI Tablespace flexfield with the tablespace to be used for this table.
5. (Optional) To assign the tablespace for individual indexes, edit the constraint and assign the OBI Tablespace flexfield value to match the tablespace name to be used.

Integrating Interactive Dashboards and Siebel Operational Applications Data

This appendix describes the additional configuration steps required for you to run an Oracle Business Intelligence application with a Siebel CRM application.

After you have configured the Oracle BI Server and are able to access the dashboards, you need to update the Siebel operational application to view Analytics dashboards from within the Siebel operational application. Completing the initialization in the Siebel operational application involves the following processes:

- Section E.1, "Updating the Siebel Operational Application"
- Section E.2, "Reapplying Customized Style Sheets"
- Section E.3, "How to Configure Oracle Business Intelligence with Oracle's Siebel Web Server Extension (SWSE)"
- Section E.4, "Creating a Virtual IP Address for the SWSE and Oracle BI Presentation Services"
- Section E.5, "Testing the Virtual IP Configuration for Oracle Business Intelligence and the SWSE"
- Section E.6, "About Configuring Oracle BI Action Links"
- Section E.7, "Accessing Optional Analytics Applications"
- Section E.8, "Customizing Oracle BI Application Home Page and Dashboards"
- Section E.9, "Viewing Information About Preconfigured Dashboards"

E.1 Updating the Siebel Operational Application

The following task changes the Siebel operational application host name to the host name of the machine that runs Oracle Business Intelligence Presentation Services.

To update the Siebel operational application:

1. Open your Siebel operational application.
2. Navigate to View, then Site Map.
3. Click Integration Administration screen.
4. Click Host Administration view.
5. Query for NQHOST in the Virtual Name column:
 - In Windows, change the host name from *<AnalyticsServerName>* to the host name of the machine that runs Oracle BI Presentation Services.

- In AIX or Solaris, change the host name from *<AnalyticsServerName>* to the name of the port.

For example, `servername.siebel.com:8080`

Note: For UNIX platforms only: You might need to add the domain name suffix to the server name in order to make sure that action links work on the Oracle Business Intelligence user interface.

6. Log out of the application and log back in.

E.2 Reapplying Customized Style Sheets

For Oracle's Siebel Business Analytics versions 7.7 and later, new styles have been appended to the following style sheets:

- Go.css
- PortalBanner.css
- PortalContent.css
- Views.css

These new classes are identified in the style sheets. In this version of Oracle Business Intelligence, new styles and files must be added to the underlying style sheet (for example, to `s_Siebel7`). For complete functionality, any custom styles require similar updating. In addition, `views2.css` and some other files have been added to the `s_` directory. For custom column formatting to work properly, references to font sizes and families should also be removed from the TD Styles section in `PortalBanner.css`, `PortalContent.css`, `Views.css`.

Because of these changes to styles, review your deployment's customizations manually, reapply them, and test them thoroughly to ensure that there are no problems.

After you have tested them, but before you copy the default `views.css` files back to the implementation server, perform the following task on the server to clear the server caches.

To clear the server caches and restore your default views:

1. Shut down Oracle Business Intelligence Server, Oracle BI Presentation Service and IIS.
2. Remove your custom `views.css` from the directory where it has been installed.

For example:

```
$INSTALL\web\app\res\s_Siebel7\b_mozilla_4
```

or

```
$INSTALL\OracleBIData\Web.
```

3. Clear the Oracle BI Presentation Services Server Cache.

In the `C:\WINNT\Temp` directory, delete the `nQs_*.temp` files.

4. Clear the Browser Cache.

From the Internet Explorer menu, navigate to Tools, then Internet Options, then Settings, then View Files, and delete all the files in this directory.

5. Restore the default views.css files to the appropriate directory.
6. Restart the Analytics Server, Oracle BI Presentation Services and IIS.

E.3 How to Configure Oracle Business Intelligence with Oracle's Siebel Web Server Extension (SWSE)

Whenever you run Oracle Business Intelligence and Siebel Web Server Extension (SWSE) on separate machines, you must perform additional configuration steps in order for action links and interactive charts to work. If, for example, you plan to run the SWSE and Oracle Business Intelligence Presentation Services on different Web servers, you must use some kind of networking or load balancing mechanism to create a single logical domain (or virtual IP address) for the two machines.

When one virtual IP address is created for two machines, the Web browser accesses one IP address and is still routed to different physical machines, based on the port accessed. From the browser, it appears that both servers are running on the same IP address.

You can use any of several physical methods to create a single logical domain, such as running SWSE and Oracle Business Intelligence Presentation Services on a single machine if you are not load balancing the SWSE, or using a router to do the mapping, or using load balancing software. Your company must determine the best mechanism to accomplish this routing given the topology being used.

Configuring Oracle Business Intelligence to work with Siebel Web Extension includes the following tasks:

- [Section E.4, "Creating a Virtual IP Address for the SWSE and Oracle BI Presentation Services"](#)
- [Section E.5, "Testing the Virtual IP Configuration for Oracle Business Intelligence and the SWSE"](#)

E.4 Creating a Virtual IP Address for the SWSE and Oracle BI Presentation Services

You create a virtual IP address for the Siebel Web Server Extension (SWSE) and Oracle BI Presentation Services in order to make it appear that all servers are running on the same virtual machine. The easiest way to do this is to configure Oracle BI Presentation Services to run on a different port (for example, port 84) from SWSE (which usually runs on port 80).

For example, SWSE is load-balanced across *<machine1>*:port 80 and *<machine2>*: port 80, and Oracle BI Presentation Services is running on *<machine3>*:port 84, and the virtual address is defined as `http://siebel.company.com`. Therefore, the network or load-balancing software should be configured to route requests like `http://siebel.company.com` to *<machine1>* and *<machine2>*, and to route requests like `http://siebel.company.com:84` to *<machine3>*.

To create a virtual IP address for Siebel Web Engine and Oracle BI Presentation Services:

1. On the network, set up CSS to direct requests from *<virtual domain>* to *<physical Siebel Web Server Extension machine>*:

- Where the acronym CSS represents the load-balancer or router used to do the virtual IP configuration.
 - Where *<virtual domain>* is the virtual IP prefix that users enter to navigate to the Siebel applications (in the preceding example, this is `http://siebel.company.com`).
2. On the network, set up CSS to direct requests from *<virtual domain>:84* to *<physical Oracle BI Presentation Services machine>:84*.
 3. In the Siebel application, using the Siebel Administration screen, set the NQHost parameters for Oracle Business Intelligence Symbolic URLs to point to the *<virtual domain>:84*, instead of directly to the Oracle Business Intelligence Presentation Services server physical machine.

Note: If you are running Oracle's Siebel Business Analytics 7.5.3 instead of version 7.7 or later, perform the following additional step.

4. In the Siebel application on the Oracle Business Intelligence Presentation Services server machine, locate the registry setting `\SOFTWARE\Siebel Systems, Inc.\Siebel Analytics\Web\7.5\Charts`.
5. Add a new key, `ForceFileBasedPainter`, and enter `TRUE` into the Data string.

E.5 Testing the Virtual IP Configuration for Oracle Business Intelligence and the SWSE

Use a client browser to verify that Oracle Business Intelligence and SWSE work when accessed directly through a physical machine address, using the following procedure. For *<virtual domain>*, substitute the Virtual IP address you created in [Section E.4, "Creating a Virtual IP Address for the SWSE and Oracle BI Presentation Services"](#).

To test the Virtual IP configuration with Oracle Business Intelligence and SWSE:

1. In a client browser, type *<virtual domain>:84/analytics*. The Oracle Business Intelligence logon appears.
2. In a client browser, type *<virtual domain>/callcenter* (or other Siebel application). The SWSE appears.
3. Navigate to an Analytics screen within the Siebel application to see if Oracle Business Intelligence appears.
4. Interact with Oracle Business Intelligence charts and action links.

E.6 About Configuring Oracle BI Action Links

For information about how to configure and use Oracle BI action links, see *Oracle Fusion Middleware Integrator's Guide for Oracle Business Intelligence Enterprise Edition*. Specifically, refer to Part III - Configuring the Action Framework, Chapter 7 "Embedding Oracle BI EE In Oracle's Siebel CRM".

E.7 Accessing Optional Analytics Applications

Depending on the options you purchased with your Siebel operational application, you must perform additional steps in order to access the corresponding Oracle

Business Intelligence options. Listed below are the additional options for Oracle Business Intelligence:

- Oracle Sales Analytics
- Oracle Service Analytics
- Oracle Marketing Analytics
- Oracle Price Analytics
- Oracle Partner Analytics

By default, the dashboards and reports contained in these optional areas are hidden. If, for example, you purchased Sales Analytics with your Sales application, you must perform the additional steps shown in the following procedure to access the Sales Analytics.

To turn on options for Sales Analytics:

1. Log in to Oracle Business Intelligence as Administrator.
2. Navigate to Answers, then Oracle BI Presentation Services Administration and select the option to manage Presentation Services groups and users.
3. Locate the Web Group corresponding to your option.

The Web Group options are shown in the following list.

- No Forecasting
 - No Forecasting Lite
 - No Universal Queuing
 - No Email Response
 - No Service Agreements
 - No Partner Marketing
 - No Partner ERM
 - No Partner ISS
4. Click on the Edit icon.
 5. Under the Group Membership section, click the delete icon (X) to delete Analytics Users from this group.
 6. Click Finished and log out of the application.
 7. Log in again to access the additional optional dashboards and reports.

E.8 Customizing Oracle BI Application Home Page and Dashboards

To customize your Oracle Business Intelligence application's home page and dashboards, do the following:

1. Configure a new Home Page to use a symbolic URL, as described in [Section E.8.1, "Configure a new Home Page to use a symbolic URL"](#).
2. Determine the Oracle BI Report path argument, as described in [Section E.8.2, "Determine the Oracle BI Report Path Argument"](#).
3. Add Views for Custom Oracle BI Interactive Dashboards, as described in [Section E.8.3, "Add Views for Custom Oracle BI Interactive Dashboards"](#).

E.8.1 Configure a new Home Page to use a symbolic URL

Oracle Business Intelligence applications are integrated with Siebel operational applications using the symbolic URL infrastructure. The following task describes how to use symbolic URLs to link a new report to a Siebel operational application home page and how to add new Analytics Dashboards to the Siebel operational application. The symbolic URL specifies how the HTTP request to the external application should be constructed and to defines any arguments and values to be sent as part of the request.

Note: For more information on the symbolic URL infrastructure, see Siebel Portal Framework Guide. This topic assumes that you have successfully built a symbolic URL to link some external content, using the instructions given in Siebel Portal Framework Guide.

For each Analytical report on a Siebel operational application home page, there is a symbolic URL record defined that links the home page to the Analytics report. If you have not already done so, you need to create a new home page and set it up to use a symbolic URL.

The figure below shows example Inline and IFrame symbolic URL arguments.

Figure E-1 Examples of Symbolic URL Arguments

Inline

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
Cmd	✓	Constant	Go	✓		1
Path	✓	Constant	/shared/Service/Service Requests	✓		2
Syndicate	✓	Constant	Siebel	✓		3
mqUser	✓	Command	UseSiebelLoginId	✓		4
mqPassword	✓	Command	UseSiebelLoginPassword	✓		5

IFrame

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
IFrameLogin:Cmd	✓	Constant	Logon	✓		1
Cmd	✓	Constant	PortalPages	✓		2
IFrameLogin:mqUser	✓	Command	UseSiebelLoginId	✓		3
IFrameLogin:mqPassword	✓	Command	UseSiebelLoginPassword	✓		4
PortalPath	✓	Constant	/shared/Service/_Portal/Activities	✓		5
PostRequest	✓	Command	PostRequest	✓		6
IFrameLogin:Syndicate	✓	Constant	Siebel	✓		7

To configure a new Home Page to use a symbolic URL:

1. Make sure the symbolic URL has been set up.
2. Launch the Siebel operational application and navigate to the Integration Administration, then Symbolic URL Administration view.
3. Query for the symbolic URL that has been set up for Analytics.

The name of this symbolic URL should be exactly the same as the calculated value of the field that was added to the Business Component. For example, you might have a symbolic URL named HomePageAnalytics.

4. In the URL field, enter the Web URL. For example:

`http://NQHOST/Analytics/saw.dll`

For the Host Name, choose the Analytics Server Name from the drop-down list. The following table shows the other parameters for reports.

Parameter	Value
NQHOST	A virtual name in the URL that points to the Oracle BI Presentation Services machine
Fixup Name	Inside Applet
SSO Disposition	Inline
Oracle BI Presentation Services application name	Select from the drop-down list

5. Create the appropriate symbolic URL Arguments.

These arguments depend upon the particular Analytics report that you are trying to display. The Argument Values should be the same for any Analytics report you work with, except for the Path Argument Value. Use the procedure in [Section E.8.2, "Determine the Oracle BI Report Path Argument"](#) to determine the path to the Analytics report.

E.8.2 Determine the Oracle BI Report Path Argument

The Path argument provides the symbolic URL with the path to a report in Oracle BI Presentation Services. (For example, `/shared/Sales/Pipeline/Overview/Top 10 Deals`.) Use the following procedure to determine the path to a report.

To determine the path to the report:

1. Log on to your Oracle BI Presentation Services as an Administrator.
2. In the Siebel operational application, navigate to Answers, then Oracle BI Presentation Services Administration.
3. Select Manage Analytics Catalog, and then navigate to your report.
4. Add this path name to the Symbolic URL argument.

The following table shows the symbolic URL path arguments for reports.

Name	Type	Path Argument Value	Append	Sequence #
Cmd	Constant	GO	Y	1
Path	Constant	<code>/shared/Sales/Pipeline/Overview/Top 10 Deals</code>	Y	2
Syndicate	Constant	Siebel	Y	3
nQUser	Command	UseSiebelLoginId	Y	4
nQPassword	Command	UseSiebelLoginPassword	Y	5
PostRequest	Command	PostRequest	Y	6

E.8.3 Add Views for Custom Oracle BI Interactive Dashboards

This task is similar to that of adding Oracle Business Intelligence reports to the home page:

- Using Oracle's Siebel Tools, set up a new view.

- In the Siebel operational application, define a symbolic URL for that view.

For more information on how to set up a view to use Symbolic URLs, see Siebel Portal Framework Guide.

To configure the symbolic URL for Analytics dashboards:

1. Define a Symbolic URL.
 - a. Navigate to Site Map, then Integration Administration, then Symbolic URL Administration.
 - b. In the Symbolic URL Administration view, add a new record.
2. Define Symbolic URL arguments.
 - a. Navigate to Symbolic URL Administration.
 - b. In the Symbolic URL Administration list, select the Symbolic URL you want to configure.

E.9 Viewing Information About Preconfigured Dashboards

If your organization has pre-built applications installed, you can use Catalog Manager to locate and view information about preconfigured dashboards. You might have to expose the dashboards and requests.

E.9.1 Exposing Dashboards and Requests

Depending on the Oracle Business Intelligence options your organization purchased, you might need to expose these options before the associated dashboards and requests can be viewed in Oracle BI Presentation Services and in Catalog Manager. This applies to sites that have the following pre-built applications:

- Sales Analytics
- Service Analytics
- Contact Center Analytics
- Marketing Analytics
- Partner Analytics

E.9.2 Locating Dashboards, Page Names and Reports

In Catalog Manager, the Presentation Catalog distributed with pre-built applications has the following structure: Presentation Catalog > shared folder > pre-built application name > _portal folder > dashboard name > page name. The path to locate reports is Presentation Catalog > shared folder > pre-built application name > Folder name > Report name.

Preconfigured Mappings for Siebel System Subject Area

This appendix describes the preconfigured mappings for the Siebel Applications system subject area.

This appendix applies to Siebel source systems only.

F.1 About Preconfigured Mappings for Siebel System Subject Area

For Oracle's Siebel Applications customers, [Table F-1](#) describes the preconfigured mappings for the SA system subject area. Fields that are not available in the Siebel transactional database will default to values shown in the table.

- **Overriding Defaults.** You can add user-specific values for these fields, by creating an extension table to the S_USER table. to store the user-specific defaults for these fields. Additionally, you can change any of the default values. The metadata for the following logical table can be modified to include any physical extension table.

SA User . (User)

For instructions, refer to the documentation about configuring tables and columns for Oracle's Siebel Business Applications.

- **Setting Provider Information.** Typically, the cell phone and the fax numbers in the Oracle Business Analytics Warehouse do not contain a provider name. Therefore, the Pager will typically be a numeric value such as 555-483-3843. To append a provider to this address, use the following guidelines:
 - If the entire company has the same provider, then you can append the provider in the column mappings.
 - If users can have different providers, you need to create an extension table. For instructions, refer to the documentation about configuring tables and columns for Oracle's Siebel business applications.

Table F-1 Preconfigured Mappings for the User Table in the SA System Subject Area

Logical Column	Physical Table	Expression	Comments
Cell Phone		"	It might be mapped to S_CONTACT.CELL_PH_NUM if this field contains SMTP address.
Cell Phone Priority		"	Defaults to N

Table F-1 (Cont.) Preconfigured Mappings for the User Table in the SA System Subject

Logical Column	Physical Table	Expression	Comments
Display Name	S_CONTACT	"Real Time OLTP"."SIEBEL.S_ CONTACT_User.FST_NAME ' ' "Real Time OLTP"."SIEBEL.S_ CONTACT_User.LAST_ NAME	First Name concatenated with Last Name
Email	S_CONTACT	EMAIL_ADDR	
Email Priority		'HNL'	Defaults to N
Email Type		'html'	Defaults to HTML
Group Name	S_RESP	NAME	
Handheld		"	Defaults to an empty string
Handheld Priority		"	Defaults to an empty string
Language		'en'	Defaults to 'en'
Locale		'en'	Defaults to 'en'
Logon	S_USER	LOGIN	
Pager		"	It could be mapped to S_ CONTACT.PAGER_PH_ NUM if this field contains SMTP address
Pager Priority		"	Defaults to N
Time Zone	S_TIMEZONE	NAME	

Available Languages for Oracle BI Applications Release 11.1.1.8.1

This appendix provides a list of the available languages for Oracle BI Applications release 11.1.1.8.1.

This appendix contains the following topics:

- [Section G.1, "Available Languages for Release 11.1.1.8.1"](#)

G.1 Available Languages for Release 11.1.1.8.1

The available languages for Oracle BI Applications release 11.1.1.8.1 are listed in [Table G-1](#).

Table G-1 Available Languages for Release 11.1.1.8.1

Language	Code
Arabic	l_ar
Chinese (Simplified)	l_zh-CN
Chinese (Traditional)	l_zh-TW
Croatian	l_hr
Czech	l_cs
Danish	l_da
Dutch	l_nl
English	l_en
Finnish	l_fi
French	l_fr
French-Canadian	l_fr-CA
German	l_de
Greek	l_el
Hebrew	l_he
Hungarian	l_hu
Italian	l_it
Japanese	l_ja
Korean	l_ko

Table G-1 (Cont.) Available Languages for Release 11.1.1.8.1

Language	Code
Norwegian	l_no
Polish	l_pl
Portuguese	l_pt
Portuguese (Brazilian)	l_pt-BR
Romanian	l_ro
Russian	l_ru
Slovak	l_sk
Spanish	l_es
Swedish	l_sv
Thai	l_th
Turkish	l_tr

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