

JD Edwards EnterpriseOne Tools

One View Administration Guide

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Preface

Welcome to the *JD Edwards EnterpriseOne Tools One View Administration Guide*.

Note: This guide has been updated for JD Edwards EnterpriseOne Tools Release 9.1 Update 3. For details on documentation updates, refer to the *JD Edwards EnterpriseOne Tools Net Change for Tools Documentation Library*.

Audience

This guide is intended for system administrators and technical consultants who are responsible for installing and configuring One View Reports and users who are responsible for One View Watchlist administration.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

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Related Documents

You can access related documents from the JD Edwards EnterpriseOne Release Documentation Overview pages on My Oracle Support. Access the main documentation overview page by searching for the document ID, which is 876932.1, or by using this link:

<https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=876932.1>


To navigate to this page from the My Oracle Support home page, click the Knowledge tab, and then click the Tools and Training menu, JD Edwards EnterpriseOne, Welcome Center, Release Information Overview.

This guide contains references to server configuration settings that JD Edwards EnterpriseOne stores in configuration files (such as `jde.ini`, `jas.ini`, `jdbj.ini`, `jdelog.properties`, and so on). Beginning with the JD Edwards EnterpriseOne Tools

Release 8.97, we highly recommend that you only access and manage these settings for the supported server types using the Server Manager program.

Conventions

This document uses the following text conventions:

Convention	Explanation
Bold	Indicates field values.
<i>Italics</i>	Indicates emphasis and JD Edwards EnterpriseOne or other book-length publication titles.
Monospace	Indicates a JD Edwards EnterpriseOne program, other code example, or URL.
	Indicates a link to a recording of the described feature. These recordings are in MP4 format so ensure that you have an appropriate player installed. Access to these recordings requires a valid Oracle account.

Part I

One View Reporting Administration

JD Edwards EnterpriseOne One View Reporting enables you to easily run existing reports or create new reports that contain tables, graphs, and charts, and to view them in a variety of formats, such as PDF documents, HTML, and Excel spreadsheets. Additionally, many reports enable you to interactively filter the report data for further analysis.

This part contains the following chapters:

- [Chapter 1, "Understanding One View Reporting"](#)
- [Chapter 2, "Installing and Configuring One View Reporting"](#)
- [Chapter 3, "Working with One View Reports"](#)
- [Chapter 4, "Administrative Tasks"](#)

Understanding One View Reporting

This chapter contains the following topics:

- [Oracle BI Publisher and JD Edwards EnterpriseOne](#)
- [One View Reporting Overview](#)

1.1 Oracle BI Publisher and JD Edwards EnterpriseOne

JD Edwards EnterpriseOne has three integrations with Oracle Business Intelligence (BI) Publisher. Each integration addresses a specific reporting requirement: producing customer facing documents, enabling end users to create their own operational reports, and providing power users and IT staff with the ability to create complex ad hoc reports. This section provides a summary of each integration and common use cases for each.

- **Embedded BI Publisher for JD Edwards EnterpriseOne:** Transforms the output from a UBE into customer facing documents (Pixel Perfect). Common use cases for Embedded BI Publisher with JD Edwards EnterpriseOne are invoices, statements, pick slips, and checks.

See the *JD Edwards EnterpriseOne Tools BI Publisher for JD Edwards EnterpriseOne Guide* for more information.

- **One View Reporting:** Enables end users to create and run their personalized reports directly from JD Edwards EnterpriseOne interactive applications. These reports are typically specific to the user or role and are those that users will run on a daily, weekly, or other periodic basis as part of their normal activities. Users require a high degree of personalization regarding data selection, sequencing, data columns included, and data visualization (charts, tables, graphs) with this type of report. These end user reports improve user productivity by providing users with better visibility into operational data as part of their standard day-to-day business process. One View Reporting enables users to select data fields and perform specific data selection from within JD Edwards EnterpriseOne applications and leverage the layout capabilities within BI Publisher to define the report output formatting. Common use cases might be sales reports, customer reports, supplier reports, and employee reports. This guide describes the installation, configuration, and administrative tasks for the One View Reporting integration and use cases.
- **Ad Hoc Reporting:** Allows power users and IT staff to build powerful queries to interrogate data on an ad hoc basis. This type of report is typically created to meet a specific business requirement outside of the normal business process, and it is only run once or twice. These reports typically require users to create a SQL statement to retrieve the data (query builder). The query is usually created by the IT department or a power user who understands the JD Edwards EnterpriseOne

data schema. After building the query, IT or a power user will create a report layout with tables and charts to display the data (template builder). This integration leverages the JD Edwards EnterpriseOne JDBC Driver and Oracle BI Publisher Enterprise Edition. This integration has commonly been called “interactive reporting.” By definition, there are no common use cases.

1.2 One View Reporting Overview

Oracle’s JD Edwards EnterpriseOne One View Reporting provides an intuitive, easy-to-use method for you to access data and produce reports with Oracle BI Publisher.

You can easily run existing reports or create new reports that contain tables, graphs, and charts and view them in a variety of formats, such as PDF documents, HTML, and Excel spreadsheets. Additionally, many reports enable you to interactively filter the report data for further analysis.

One View Reporting allows the use of standard and customized find browse forms to locate report data. Release 9.1 also introduces One View applications, which use joined business views to access records from multiple tables. The One View find browse forms combine business transactional and master data in combinations not previously available, and you can view these data combinations in the BI Publisher layout you choose. You can also use Data Browser to locate report data and produce One View reports.

The benefits of One View Reporting include:

- Reducing the cost of developing and maintaining reports by eliminating IT support for most reporting needs.
- Improving total cost of ownership by eliminating the need for third-party reporting products.
- Improving end user satisfaction by providing easy, real-time access to information.
- Enabling business decision making by providing low cost access to information.
- Reducing the cost of system upgrades by reducing or eliminating custom applications that were required for viewing data or producing reports.

Installing and Configuring One View Reporting

This chapter contains the following topics:

- [Section 2.1, "Installing Oracle BI Publisher"](#)
- [Section 2.2, "Installing JD Edwards EnterpriseOne Boilerplates for BI Publisher"](#)
- [Section 2.3, "Giving the BIAuthor Role Access to the Boilerplates"](#)
- [Section 2.4, "Configuring BI Publisher Users"](#)
- [Section 2.5, "Understanding and Managing One View Reports"](#)
- [Section 2.6, "Verifying the One View Reporting BI Publisher Soft Coding Template"](#)
- [Section 2.7, "Creating a One View Reporting BI Publisher Soft Coding Record"](#)
- [Section 2.8, "Setting Up One View Reporting Feature Authorizations"](#)
- [Section 2.9, "Mapping a JD Edwards EnterpriseOne User to a BI Publisher User"](#)
- [Section 2.10, "Installing One View Reports"](#)
- [Section 2.11, "Working with Configuration Settings"](#)
- [Section 2.12, "HTML Server Clustering Considerations"](#)

2.1 Installing Oracle BI Publisher

This section provides an overview of installing Oracle Business Intelligence (BI) Publisher, lists prerequisites, and discusses how to install Oracle BI Publisher 11g. The new One View Reporting solution integrates JD Edwards EnterpriseOne interactive applications with BI Publisher interactive layout editor to create an easy to use end user reporting solution.

2.1.1 Oracle BI Publisher Installation Overview

Oracle BI Publisher is a reporting solution that enables you to author, manage, and deliver all your reports and documents easier and faster than traditional reporting tools.

For One View Reporting, you only need to install Oracle BI Publisher. You do not need to install Oracle Business Intelligence Enterprise Edition or Oracle Real-Time Decisions.

BI Publisher installs WebLogic, you do not need to install it beforehand. The default domain in WebLogic functions for BI Publisher, so you do not need to create an additional domain unless you prefer to keep the domains separate.

2.1.2 Prerequisites

Before you complete the tasks in this section, you must:

- Install JD Edwards EnterpriseOne Applications Release 9.1.
- Review the Certifications for JD Edwards EnterpriseOne One View Reporting. See document 745831.1 (JD Edwards EnterpriseOne Minimum Technical Requirements Reference) on My Oracle Support:

<https://support.oracle.com/epmos/faces/DocumentDisplay?id=745831.1>

- Install and configure a supported database.

For the latest information about supported databases, visit the Oracle Fusion Middleware Certification document at:

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

Look for product area “Oracle Fusion Middleware 11g Release 1 Certifications” and then access “System Requirements and Supported Platforms for Oracle Business Intelligence Suite Enterprise Edition 11gR1 (11.1.1.3.0-11.1.1.6.0) (xls).

- After you have installed a database, ensure that it is configured correctly by referring to the “Repository Creation Utility (RCU) Requirements” section in the *System Requirements and Specification document for Oracle Fusion Middleware 11g Release 1 (11.1.1.x)*:

http://docs.oracle.com/html/E18558_01/fusion_requirements.htm#CHDJGECA

You can also access the document at:

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

- Download Oracle BI Publisher from the Oracle Software Delivery Cloud:

<https://edelivery.oracle.com>

Select Oracle Business Intelligence for the Product Pack field and choose the appropriate platform.

- Download the Oracle Repository Utility (RCU) from Oracle Technology Network (OTN), Oracle Business Intelligence (11.1.1.x) Downloads page:

<http://www.oracle.com/technetwork/middleware/bi-enterprise-edition/downloads/bi-downloads-1923016.html>

The RCU version must match the BI Publisher version.

- Configure your browser to allow pop-ups.
- Ensure that Adobe Flash Viewer is installed.

2.1.3 Installing Oracle BI Publisher

If you do not plan to change any of the default settings, such as ports and security logins, then follow the *Quick Installation Guide for Oracle Business Intelligence* to perform the installation. If you do plan to change some of the default settings, then follow the *Installation Guide for Oracle Business Intelligence*. Please note that although the Oracle BI installation package includes the following products, with all the technology required to install, configure, and run them, you only need to install Oracle Business Intelligence Publisher:

- Oracle Business Intelligence Publisher

- Oracle Business Intelligence Enterprise Edition (Oracle BI Answers, Oracle BI Interactive Dashboards, Oracle BI Delivers, Oracle BI Administration Tool, Oracle BI Add-in for Microsoft Office, and Oracle BI Publisher) (optional)
- Oracle Real-Time Decisions (optional)
- Essbase Suite (optional)

Oracle BI Publisher 11g (11.1.1.7) is packaged with WebLogic Server 10.3.5.0 and Oracle JDK 1.6.0_35.

IMPORTANT!: For One View Reporting, you only need to install Oracle BI Publisher.

The following steps provide brief guidance for the installation. Review these steps first and then please use the installation guide, *Quick Installation Guide for Oracle Business Intelligence*, or if you plan to change some of the default settings, *Installation Guide for Oracle Business Intelligence*, for more detailed steps.

Note: A new installation of BI Publisher 11.1.1.7 is recommended even if you are currently on a prior release. This allows you to do some parallel testing before switching to the latest release.

To install Oracle BI Publisher:

1. Launch the Oracle Repository Utility (RCU) and create the BI Publisher Schemas. (BIPLATFORM and MDS).

For more information, see the *Quick Installation Guide for Oracle Business Intelligence* guide.

2. Launch the Oracle Business Intelligence Installer after the schemas are created.

Caution:

- Do not install the software using a user ID that contains a special character.
 - BI Publisher and the HTML server must be within the same firewall in order to have two-way web service and http communication.
 - If you have anti-virus software running on your installing machine, the installation process may take longer.
-

3. Select the appropriate installation type:

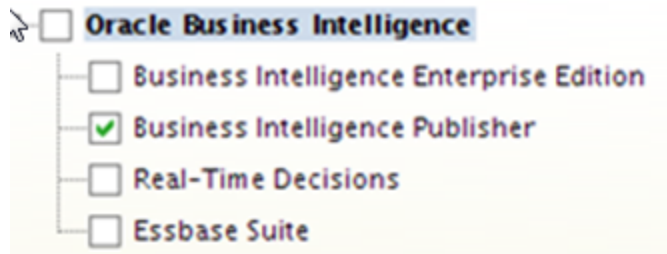
- “Simple Install” installs Oracle Business Intelligence components with the default settings on a single computer in the minimum number of steps. The Managed Server is not installed. This installation is targeted for demonstration, evaluation and proof of concept use cases.
- “Enterprise Install” installs Oracle Business Intelligence components that you select and associates them with the Middleware, Oracle data source, and WebLogic Server homes that you specify. The enterprise installation type creates a separate Managed Server, bi_server1, along with the Admin Server.

You should also use this installation type if you have a previous version of BI Publisher installed.

This installation type is recommended for a production environment.

- “Software Only Install” installs software binary files in an existing Middleware home for later configuration.
4. When the Oracle Business Intelligence Component Installation screen appears, select only the Business Intelligence Publisher option:

Figure 2–1 Business Intelligence Publisher Installation Screen



Note: For detailed instructions on how to install Oracle BI Publisher, see the *Quick Installation Guide for Oracle Business Intelligence*.

5. When the installation and configuration finish, sign onto the WebLogic Admin Console and BI Server to make sure the servers are up and running by using the following URLs:

`http://host:port/console` (WebLogic Admin Console)

`http://host:9704/xmlpserver` (BI Publisher login page, port 9704 is the default port for “Enterprise Install” type)

6. Review the Certifications for any updates or additional requirements.

To configure an SSL connection between the EnterpriseOne HTML Server and Oracle BI Publisher server, see “Configuring an SSL Connection Between the EnterpriseOne HTML Server and Oracle BI Publisher Server for One View Reporting” in the *JD Edwards EnterpriseOne Tools Security Administration Guide*.

2.1.4 Migrating Users to a New Version of Oracle BI Publisher (Release 9.1 Update 3.3)

If you are upgrading your version of Oracle BI Publisher from a previous version (for example, moving from Oracle BI Publisher 11.1.1.5 to 11.1.1.7), after the installation, you must migrate the WebLogic users from an existing version to the new server.

To migrate users to a new version of Oracle BI Publisher:

1. Export the user information from the existing BI Server.
 - a. Log on to the BI Publisher WebLogic Admin Console.
 - b. Select Security Realm.
 - c. Select Export from the Migration tab.
 - d. Enter the location for the exported files.
 - e. Click Save.

2. Import the user information to the new server.
 - a. Log on to the BI Publisher WebLogic Admin Console.
 - b. Select Security Realm.
 - c. Select Import from the Migration tab.
 - d. Enter the location of the exported files.
 - e. Click Save.
3. Download and import the JD Edwards EnterpriseOne Reports for BI Publisher.

Note: Existing reports from the previous version of BI Publisher will not run successfully; you must manually convert them to the new version.

For personal reports, this is done when you select an existing report and use the Save, Save As, Copy, Promote, or Sync options on the Report Definition tab.

For shared reports, this is done when you select an existing report and use the Copy, Reserve, and Sync options on the Report Definition tab.

For more information, see the “Enabling the Decimal Formatting Feature” section of the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*.

4. Upload the JD Edwards EnterpriseOne Boilerplates templates.

2.2 Installing JD Edwards EnterpriseOne Boilerplates for BI Publisher

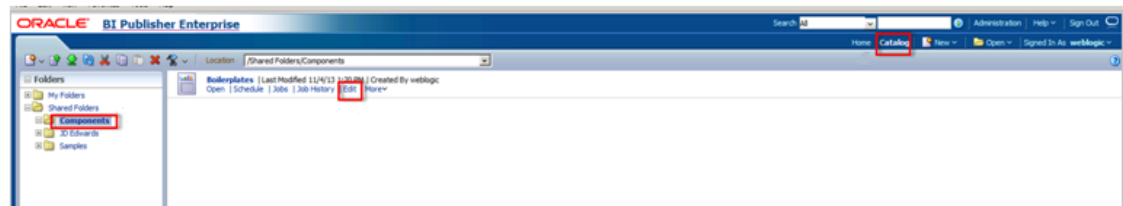
Template files are used to create JD Edwards EnterpriseOne report layouts. After BI Publisher is fully installed, you may want to install the boilerplate templates created by JD Edwards. These templates are not mandatory to run One View Reports, but you are welcome to use them to achieve a look and feel that is consistent with the delivered One View Reports.

To install JD Edwards EnterpriseOne boilerplate templates for BI Publisher:

1. Download the One View Boilerplates component (JDE_Boilerplates.zip) from the Update Center on My Oracle Support.
<https://updatecenter.oracle.com/>
2. Extract the four .xpt files from JDE_Boilerplates.zip file using an unzip program and save them to your hard drive.
3. Log into BI Publisher with administrator privileges and navigate to the Catalog.
4. In the Folders pane, open Shared Folders directory and then the Components folder.

Note: If you have installed both OBIEE and BI Publisher on the same server, you might not see the Components folder and boilerplates functionality. To correct this, see [Missing Boilerplates in Components Folder in BI Publisher](#).

5. Locate the Boilerplates report and select Edit.



6. Select Add New Layout from the upper right corner of the screen.
7. Select Upload and then when prompted, select the EnterpriseOne boilerplate template file (.xpt file) that you stored on your hard drive.
8. Provide a name for the template, select "BI Publisher Template" as the type, and select "English" for locale.
9. Select Upload to save the template.
10. Repeat these steps to add the remaining EnterpriseOne template files.

Note: Any BI Publisher templates (.xpt files) added to the Boilerplates report are displayed to all users as shared templates.

2.3 Giving the BIAuthor Role Access to the Boilerplates

After the Boilerplates are uploaded, you need to make sure that all users with the BIAuthor role have access to the boilerplates. Depending on your specific setup, you might also assign other roles to your users. Only the BIAuthor role is required.

To give the BIAuthor role access to the boilerplates:

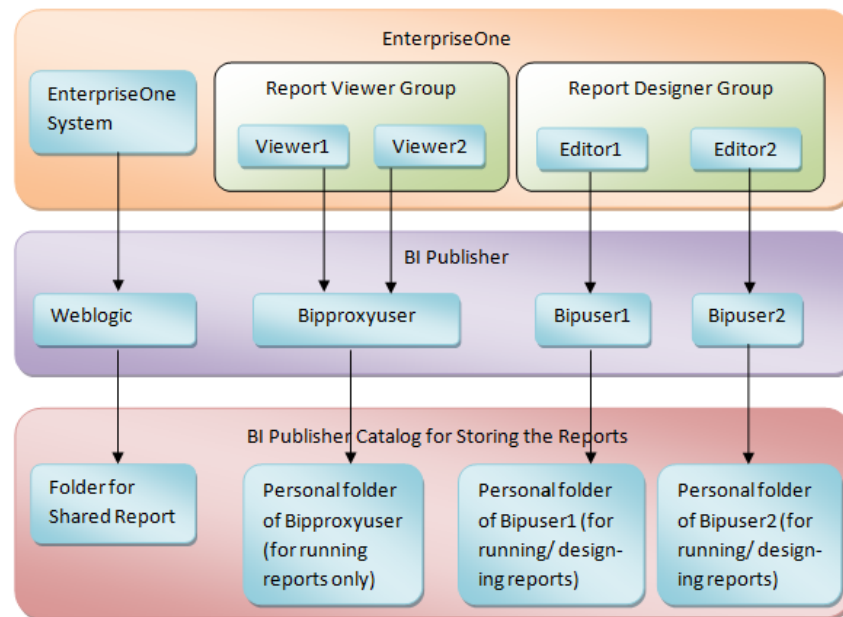
1. Log into BI Publisher with administrator privileges and navigate to the Catalog.
2. In the Shared Folders directory, open the Components folder.
3. Select the More drop-down menu and then Permissions.
4. Select the "+" symbol (Create) and then the Search button.
5. Add the BIAuthor role and click OK.
6. Check all the check boxes for the BIAuthor role and click OK.

Note: You, as the System Administrator, should determine whether or not to grant users the permission to delete boilerplates.

2.4 Configuring BI Publisher Users

When configuring BI Publisher users, you need to create a BI Publisher user for each JD Edwards EnterpriseOne user that designs or authors One View Reports. You may set up one proxy user in BI Publisher for all of the JD Edwards EnterpriseOne users who will only be running reports and not authoring them. This will minimize the amount of setup required. However, if you prefer to track each user individually for auditing purposes, you can create a one-to-one relationship by setting up a BI Publisher user for each JD Edwards EnterpriseOne user.

The following graphic shows the two types of users and how they are configured in BI Publisher.

Figure 2–2 User Setup in JD Edwards EnterpriseOne and BI Publisher

To configure a BI Publisher user:

1. Log into the WebLogic Server Administration Console.
2. Navigate to “Security Realms” and then “myrealm.”
3. Select the “Users and Groups” tab and then click “New.”
4. Create a new BIP account by providing a name, description, and password, and click OK.

Note: Do not use BIP account names or passwords that contain special characters.

5. In order to add the newly created user to the BI Author group:
 - a. Find and select your newly created user.
 - b. Navigate to the “Groups” tab.
 - c. Select the BIAuthor group and move it under Chosen.
 - d. Click Save.

Note: All BI Publisher users must belong to the BIAuthor group.

6. Click Save.
7. Verify that you can log on to the Oracle BI Publisher server using your new user information.

See *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher* for more information.



Tutorial: [Click here to view a recording of this feature.](#)

You will need to set up mappings for each JD Edwards EnterpriseOne user to the corresponding BI Publisher user. This information appears later in this chapter in [Mapping a JD Edwards EnterpriseOne User to a BI Publisher User](#).

Note: After all BI Publisher users are created in the WebLogic Server Administration Console, you must either log each user onto the Oracle BI Publisher server as suggested in the last step or restart the BI Publisher server. One of these must be done before those users can connect from JD Edwards EnterpriseOne.

2.5 Understanding and Managing One View Reports

One View Reports are managed as light weighted objects; they do not go through Object Management Workbench for their full life cycles.

Each One View Report is composed of these components:

- A data model file.
- A report template file. (This file has the same name as the data model file.)

Both of these files are stored on the BI Publisher server.

On the BI Publisher server, these reports are organized by path codes. For example, a personal report created in the One View Job Inquiry application (P51220) in DV910 path code (regardless of environment) is stored in the following BI Publisher folder: `\BIP_user_id\DV910\P51200\`.

A public report for the PY900 path code for the same application is stored here: `\Shared Folder\PY910\P51200\`.

You can move reports using import, export, or transfer functionality. You can export any report from any path code to a zip file. Then you can import the report into any path code. The transfer functionality allows you to transfer reports from one path code to another path code. However, both the source path code and target path code must point to the same BI Publisher server through the soft coding application.

In the soft coding application, please be aware that soft coding records are done at the environment level, not the path code level. You need to set up soft coding records for all environments for a particular path code.

When a user logs into a particular environment in JD Edwards EnterpriseOne, the system uses the soft coding record for the login environment and user credentials to look up the soft coding record. The soft coding record provides the BI Publisher server with which it connects, and the user ID and password required to connect to the BI Publisher server. Assuming it is BI Publisher server BIP_A, then if the user creates a report, the report will be stored on the BIP_A server. If the user then runs a report, the system will connect to the BIP_A server to run the report. If the user does an export, the system will export from the BIP_A server. If the user then imports a BI Publisher report, the system will upload the BI Publisher report to the BIP_A server. If the user transfers a report from the login path code to a target path code, the system will copy the report from the login path code folder of BIP_A to the target path code folder of the same server, BIP_A.

If the user wants to transfer a report to a different BI Publisher server, for example BIP_B, then the user will first need to export the report, logging in as a user and environment with a soft coding record pointing to BIP_A. Then the user will need to log out and log back in as a different user and environment, whose soft coding record points to BIP_B. Then the user can import the report. The system will upload the

report to the BIP_B server, essentially accomplishing the task of copying a report from BIP_A to BIP_B.

2.6 Verifying the One View Reporting BI Publisher Soft Coding Template

Access the Web Services Soft Coding Template application (P953000) by selecting the following from the Navigator drop-down menu: EnterpriseOne Menus, EnterpriseOne Life Cycle Tools, System Administration Tools, Soft Coding Administration, Soft Coding Template. Use P953000 to verify that the One View Reporting BI Publisher soft coding template exists with these values:

Field	Value
Template Name	JDE_ONEVIEW_CONNECTION
Description	One View Reporting Connection Template
SoftCoding Key	ONEVIEW_BIP_CONN Important: The value for SoftCoding Key must be ONEVIEW_BIP_CONN. You cannot use any other value for this field.
Value	<pre><webservice> <endpoint>http://bip_server:bip_port</endpoint> <username>bip_user_name</username> <password>_ _BIP_PASSWORD_ _</password> <properties> <property><name>root catalog</name><value>JD Edwards</value></property> <property><name>bip version</name><value>11.1.1.7.0</value></property> </properties> </webservice></pre> <p>To complete this field, please see the Soft Coding Value Guidelines below.</p>

Note: The version property only applies to Release 9.1 Update 3.3 and on.

2.6.1 Soft Coding Value Guidelines

When updating the One View Reporting BI Publisher connection template, use the following guidelines to ensure valid soft coding value parameters:

2.6.1.1 Http Address

The http address must follow this format with a valid, fully qualified Oracle BI Application Server name or an IP address and port number:

http://<server>:<port>

2.6.1.2 Username

The user name must be a valid BI Publisher user name with administration privileges.

2.6.1.3 _||_BI_PASSWORD_||_

An administrator has two ways to supply the password for the Oracle BI user:

- Use a placeholder parameter (masked parameter) in the soft coding value and assign the value to the parameter in the grid. The previous example used a placeholder parameter called "BI_PASSWORD" and defined the BI_PASSWORD variable in the grid. The "_||_" prefix and postfix are markers for placeholder variables.

When used this way, the value will be encrypted before it is saved into the database and is masked for future display.

- Use plain text directly in the soft coding value.

2.7 Creating a One View Reporting BI Publisher Soft Coding Record

This section provides an overview of soft coding records and discusses how to create a soft coding record.

2.7.1 Overview

You must set up a BI Publisher soft coding record in order to establish a connection from the HTML server to the BI Publisher server. You set up soft coding records by environment and by user (or role, or *PUBLIC). When a soft coding record is set up for *PUBLIC and a particular environment, everyone logged into the environment will use the same soft coding record to locate and connect to the BI Publisher server. Use the Soft Coding Records (P954000) application to set up soft coding records.

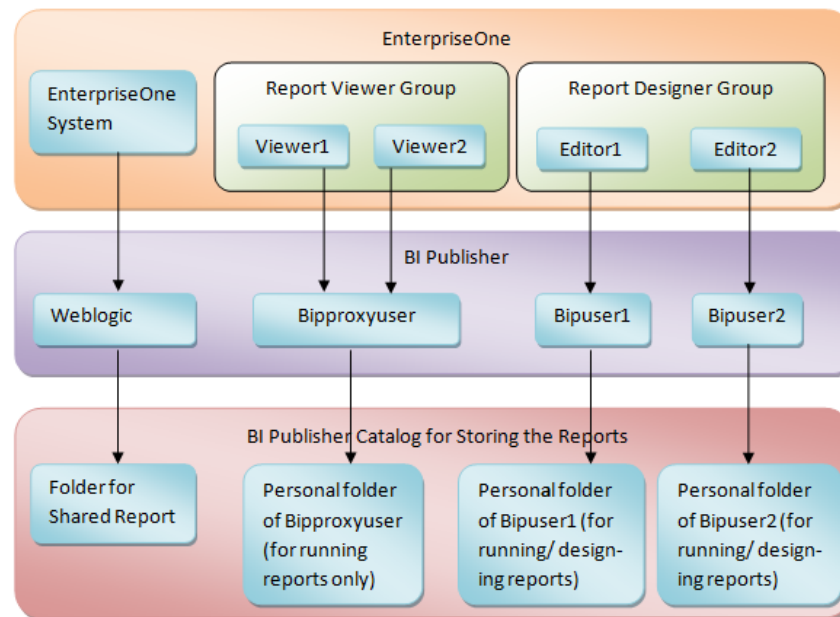
The number of soft coding records that you set up depends on how you want to set up your users. You may set up soft coding records differently. It is recommended that you divide your users into two groups:

Viewer Group

This group consists of the JD Edwards EnterpriseOne users who are only interested in viewing reports instead of designing reports. For this group of users, only set up one proxy BI Publisher user and let them share the proxy user setting in the soft coding record as their common personal credential. Do not set up JD Edwards EnterpriseOne to BI Publisher user mappings for these users in their user profiles. When setting up permissions, assign permission to run One View Reports to their JD Edwards EnterpriseOne accounts or their common JD Edwards EnterpriseOne role in the Runtime Feature Authorizations application (P958974).

Designer Group

This group consists of the JD Edwards EnterpriseOne users who design new and existing reports. For this group of users, set up their individual BI Publisher accounts on the BI Publisher Server and individual JD Edwards EnterpriseOne to BI Publisher user mappings in their JD Edwards EnterpriseOne user profiles. The individual JD Edwards EnterpriseOne to BI Publisher user mapping setting in the user profile has a higher priority than the proxy user setting in the soft coding record. Assign permission to design and share One View Reports to these users in the Runtime Feature Authorizations application (P958974).

Figure 2-3 Viewer Group and Designer Group Example

The system checks both the user profile and soft coding record for the personal credentials based on the following rules:

1. If the soft coding record does not contain the optional proxy user and proxy password setting, and the JD Edwards EnterpriseOne to BI Publisher user mapping is not set up in the user profile, then One View Reporting is disabled for the user.
2. If the soft coding record does not contain the optional proxy user and proxy password setting, and the JD Edwards EnterpriseOne to BI Publisher user mapping is set up in the user profile, then the user uses the personal BI Publisher account to access BI Publisher.
3. If the soft coding record contains the optional proxy user and proxy password setting, and the JD Edwards EnterpriseOne to BI Publisher user mapping is not set up in the user profile, then the user uses the proxy user to access BI Publisher.
4. If the soft coding record contains the optional proxy user and proxy password setting, and the JD Edwards EnterpriseOne to BI Publisher user mapping is set up in the user profile, then the user uses the personal BI Publisher account to access BI Publisher.

Important: Be sure to set up soft coding records for all of the users or roles that you intend to use.

2.7.2 Creating a Soft Coding Record

To create a One View Reporting BI Publisher soft coding record:

1. Access the P954000 application by selecting the following from the Navigator drop-down menu: EnterpriseOne Menus, EnterpriseOne Life Cycle Tools, System Administration Tools, Soft Coding Administration, Soft Coding Records.
2. Select Add.

3. Enter the following information:

Field	Value
User/Role	Enter the JD Edwards EnterpriseOne user, role, or *PUBLIC. Use *PUBLIC to set up one record for all users. Note: This must be an administrative user ID. Make sure you set up soft coding records for all of the users and roles that you intend to use.
Environment Name	Enter the JD Edwards EnterpriseOne environment for which you are creating this soft coding record.
Template Name	JDE_ONEVIEW_CONNECTION
SoftCoding Key	ONEVIEW_BIP_CONN

Important: The value for SoftCoding Key must be ONEVIEW_BIP_CONN. You cannot use any other value for this field.

- Click the Populate Soft Coding Value button to populate the Soft Coding Description and Soft Coding Value fields with the information from the JDE_ONEVIEW_CONNECTION template.
- Enter the Mask value for any Mask fields (for example, enter a value for the BI_PASSWORD).
- Enter values for the proxy user and proxy password if you plan to use a proxy user. These values are optional. The two new properties need to be added as the sibling tag after property for root catalog.

Note: The name of the property must be "proxy user" and "proxy password". For example:

```
<property><name>proxy user</name><value>_||_PROXY_USER_||_</value></property>
```

```
<property><name>proxy password</name><value>_||_PROXY_PASSWORD_||_</value></property>
```

Enter the values of _||_PROXY_USER_||_ and _||_PROXY_PASSWORD_||_ in the grid.

- (Release 9.1 Update 3.3)** Enter a value for the bip version property:

```
<property><name>bip version</name><value>11.1.1.7.0</value></property>
```
- Modify the server and port to reflect your specific installation.
- Click OK to save the record.

Note: You must add a soft coding record for each path code.

2.7.3 Soft Coding Value Guidelines

When updating the One View Reporting BI Publisher connection template, use the following guidelines to ensure valid soft coding value parameters:

2.7.3.1 Http Address

The http address must follow this format with a valid, fully qualified Oracle BI Application Server name or an IP address and port number:

`http://<server>:<port>`

2.7.3.2 Username

The user name must be a valid BI Publisher user name with administration privileges.

2.7.3.3 _||_BI_PASSWORD_||_

The administrator has two ways to supply the password for the Oracle BI user:

- Use a placeholder parameter (masked parameter) in the soft coding value and assign the value to the parameter in the grid. The previous example used a placeholder parameter called "BI_PASSWORD" and defined the BI_PASSWORD variable in the grid. The "_||_" prefix and postfix are markers for placeholder variables.

When used this way, the value will be encrypted before it is saved into the database and is masked for future display.

- Use plain text directly in the soft coding value.



Tutorial: [Click here to view a recording of this feature.](#)

2.8 Setting Up One View Reporting Feature Authorizations

This section contains these topics:

- Verifying Runtime Feature Definitions
- Setting Up Feature Authorizations
- Copying Feature Authorizations by User or Environment

2.8.1 Verifying Runtime Feature Definitions

Use the Runtime Feature Definitions application (P958973) to view or set up One View Reporting usage capabilities, such as running reports or updating shared reports. Four types of usage records are provided with One View Reporting. They are:

JDE_NOONEVIEW

User is not allowed access to One View.

JDE_RUNONEVIEW

User is only allowed to run One View Reports.

JDE_DESIGNONEVIEW

User is allowed to run, add, edit, and remove One View Reports.

JDE_DESIGNSHAREDONEVIEW

User is allowed to run, add, edit, and remove One View Reports and can request to promote them.

To view these records:

1. Access the Runtime Feature Definitions application from the Runtime Feature Administration (GH9098) menu or enter P958973 in the Fastpath.

You can also select the following from the Navigator drop-down menu to get there: EnterpriseOne Menus, EnterpriseOne Life Cycle Tools, System Administration Tools, Runtime Feature Administration, Runtime Feature Definitions.

2. Select the One View Report option.
3. Select Find.

Note: One View Reporting uses only these four records. You do not need to add any other records.

2.8.2 Setting Up Feature Authorizations

Use the Runtime Feature Authorizations application (P958974) to set up access control for users. You can set up a particular One View Reporting feature for individual users, roles, or *Public on different levels, such as system code, application level, form level, or *ALL.

You might want to consider adding roles specific to your licensed products (for example, Inventory, Financials, or Sales).

You can also set up access control to Databrowser by entering DATABROWSE as the application ID and *ALL for the other fields.

To set up access control for users:

1. Access the P958974 application by selecting the Form exit, Feature Auth from P958973 or directly from the Runtime Feature Administration (GH9098) menu.

You can also select the following from the Navigator drop-down menu to get there: EnterpriseOne Menus, EnterpriseOne Life Cycle Tools, System Administration Tools, Runtime Feature Administration, Runtime Feature Authorizations.

2. Select Add.
3. On the Feature Authorizations Revisions form, enter the feature name for which you want to add records (for example, JDE_RUNONEVIEW) and select Find. This will prevent having to scroll through too many records to add the new one.
4. Scroll down to the first empty grid line and enter the following information:

Field	Value
Environment Name	Enter the environment name.
User/Role/*Public	Enter the user or role for which you want to create the authorization record. You can also enter *Public.
Feature Name	Enter the feature name that provides the appropriate permissions that you want to give users. This is one of the four features that you verified or added in the previous section.
Form Name	Enter the form name or *ALL.
Object Name	This field is automatically populated based on the form. You can also enter "DATABROWSE" in this field to turn on the feature for Databrowser.
Product Code	Enter the product code.

5. Click OK to save the record.



Tutorial: [Click here to view a recording of this feature.](#)

2.8.3 Copying Feature Authorizations by User or Environment

After you have created feature authorization records, you may want to copy all the feature authorization records from one user or role to another user, role, or *Public. Alternatively, you might want to copy all the feature authorization records from one environment to another.

To copy by user:

1. Access the P958974 application from the Runtime Feature Administration (GH9098) menu.
2. Select Copy By User from the Form menu.
3. On the Copy Feature Authorizations form, enter the user or role from which to copy the feature authorizations. Then enter the user, role, or *PUBLIC to which you want to copy the feature authorizations.
4. Click the Save button.

To copy by environment:

1. Access the P958974 application from the Runtime Feature Administration (GH9098) menu.
2. Select Copy By Environment from the Form menu.
3. On the Copy Feature Authorizations form, enter the source environment from which to copy the feature authorizations, and enter the target environment.
4. Click the Save button.

2.9 Mapping a JD Edwards EnterpriseOne User to a BI Publisher User

You need to map each JD Edwards EnterpriseOne user to a BI Publisher user for all of the JD Edwards EnterpriseOne users who need to create and edit reports. For JD Edwards EnterpriseOne users who only run public reports, you can use the soft coding parameter <proxy user> and <proxy password> to connect to BI Publisher, and you do not need to map those JD Edwards EnterpriseOne users.

Note: If you are using a proxy user, then the password is not required in the JD Edwards EnterpriseOne user profile.

This section discusses how to enter the BI Publisher user ID and password in the user's profile in JD Edwards EnterpriseOne so that the system can use the BI Publisher user ID and password to connect to BI Publisher servers on behalf of the EnterpriseOne user.

To map a JD Edwards EnterpriseOne user to a BI Publisher user:

1. Select My System Options from the JD Edwards EnterpriseOne Personalization menu.
2. Select User Profile Revisions.
3. From the Form exits, select BI Publisher Pswd.

4. Enter the information from your BI Publisher account in the BI Publisher User ID and BI Publisher Password fields.
5. Log out of and back into JD Edwards EnterpriseOne so that the settings will take effect.
6. Whenever you change your user ID and password on the BI Publisher server, you will need to change it here as well.



Tutorial: [Click here to view a recording of this feature.](#)

Note: After all BI Publisher users are created in BI Publisher, you must restart the BI Publisher server before those users can connect from JD Edwards EnterpriseOne.

2.10 Installing One View Reports

To install One View Reports:

1. Download the One View Reports zip files, which are applicable to your JD Edwards EnterpriseOne version and BI Publisher version, from the Update Center.
<https://updatecenter.oracle.com/>
2. Log into the HTML server as a JD Edwards EnterpriseOne user with a mapped BI Publisher user.

Note: Verify that the user has access to a One View Reporting feature as described in the [Setting Up Feature Authorizations](#) section.

3. Launch an application and try to add a new report in order to verify the correct configuration. If the BI Publisher connection is set up properly, you will see the BI Publisher layout editor appear after saving the new report.
4. Navigate to EnterpriseOne Menus, EnterpriseOne Life Cycle Tools, One View Reports, and open Work with Importing One View Reports (P982402).
5. Select Add.
6. On the Work with Importing One View Reports - Import User Generated Contents form, select the Load Import File button.
7. Find and select the One View Reports zip file that you downloaded.
8. On the File Upload form, select the Load button.
The file is imported.
9. Select the import record to review the import results.
10. On the Detail for Imported Objects form, verify that "Completed Process" appears in the Status Description column for all items.

If you need to transfer the imported One View reports to another path code, see [Transfer One View Reports](#).

2.11 Working with Configuration Settings

To maximize the end user experience, you can use two Web Runtime configuration settings to limit the record retrieval size. You can access and change these in Server Manager. The settings are:

Default record counts for One View Reporting

When a One View Report runs, three options control how many records the report will run. The three options that you see in the user interface of the One View report or Layout Tab are:

- Retrieve Record Count: X
- Use current data in grid
- Retrieve all records

When you select the first option, Retrieve Record Count, the system uses this INI setting to set the default record count for the report.

Maximum record counts for One View reporting

This is the maximum number of records the system will retrieve for any One View Report.

The Server Manager interface for runtime and metric parameters provides details on the usage of each setting applicable to that parameter. Access this by clicking the “i” (Information) icon for a desired parameter.

2.12 HTML Server Clustering Considerations

In order for One View Reporting to function with an HTML Server cluster, for example, Oracle HTTP Server (OHS), you must:

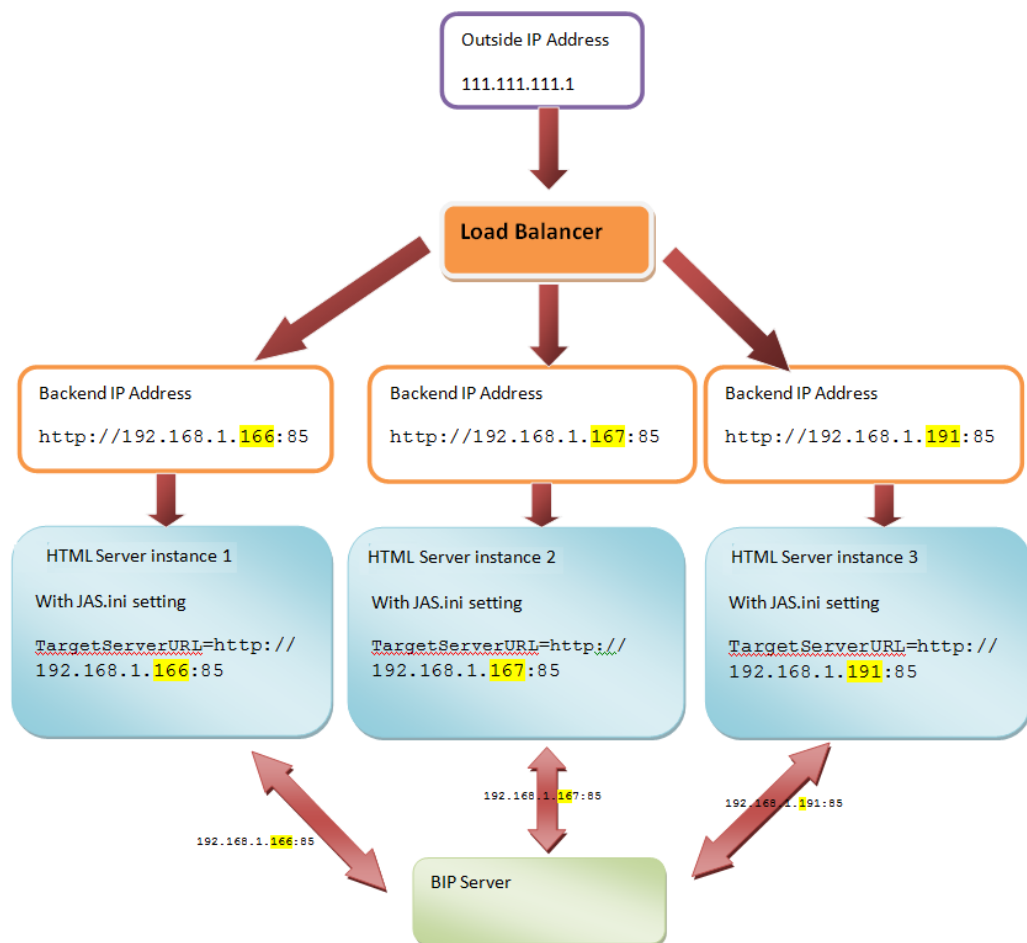
1. Verify that the Tool Release is 9.1.2.3 or higher, or 9.1.3 or higher.
2. Update the jas.ini so that all HTML Server instances point to the actual backend HTML Server URL:

[OWWEB]

TargetServerURL=http://<server>:<port>

Important: For vertical and horizontal cluster server setup through Oracle HTTP Server, the setting needs to be added manually each time after Server Manager synchronizes all of the .ini files.

The following diagram describes a typical clustering or load balancing setup:

Figure 2–4 HTML Server Clustering

Working with One View Reports

This chapter contains the following topics:

- [Section 3.1, "Understanding One View Reports"](#)
- [Section 3.3, "Promote One View Reports"](#)
- [Section 3.4, "Review One View Report Promotion History"](#)
- [Section 3.5, "Delete One View Reports"](#)
- [Section 3.6, "Export One View Reports"](#)
- [Section 3.7, "Import One View Reports"](#)
- [Section 3.8, "Transfer One View Reports"](#)

3.1 Understanding One View Reports

A One View Report consists of:

- A Business Intelligence (BI) Publisher data model, which is a <report name>.xdmz file on the BI Publisher server.
- A BI Publisher report, which is a <report name>.xdoz file on the BI Publisher server.
- The report definition for the One View Report, which is the metadata for the report and resides in JD Edwards EnterpriseOne.

One View Reports are created by end users when they select Add Reports from the One View menu on JD Edwards EnterpriseOne query forms. These One View Reports are stored on the Oracle BI Publisher server. The metadata of the One View Reports is also stored in JD Edwards EnterpriseOne tables.

3.1.1 Working with One View Reports

Working with One View Reports includes reviewing, promoting, exporting, importing, and transferring reports. A new menu has been created called "One View Reports" (GH9115) to group the One View Reporting applications. The menu contains the following applications:

Application Name on Menu	Application ID	Purpose
Work with One View Reports	P952400	Use this application to review all the One View Reports created in the system. You can also delete a report and promote a report in this application.

Application Name on Menu	Application ID	Purpose
Work with Exporting One View Reports	P982402	Use this application to export shared One View Reports to a .zip file that is stored on the local drive. Exporting is the only way to move One View Reports from one BI Publisher server to another BI Publisher server.
Work with Importing One View Reports	P982402	Use this application to import a .zip file of One View Reports. You can use importing to move reports from one BI Publisher server to another BI Publisher server, move reports from one path code to another path code, and install any One View Reporting patches.
Work with Transfer One View Reports	P982403	Use this application to transfer One View Reports between path codes. You can use this to transfer One View Reports from your development to your test to your production path code.

3.2 Querying One View Reports

You can view One View Reports via the Work with One View Reports application (P952400). Access the Work with One View Reports application from the One View Reports (GH9115) menu. To view all reports, select the All radio button. The grid shows all the One View Reports in the system.

When a report is first created by a user, it is a personal report. The status is "editing" (02). When a user requests the report to be promoted, the report is still personal, but the status changes to "Pending Promote" (07). When you (power user) promote the report, the personal report is copied to the public report (the personal copy is deleted). The public report has a status of "Shared" (08). If a power user rejects a promotion request, the report remains a personal report and the status is set back to "Editing" (02). One View Reporting uses hard-coded activity statuses from the H95/US user-defined code (UDC).

3.3 Promote One View Reports

To share newly created One View Reports, you or an administrator must first promote them. This action will move a report out of your personal folder and into a shared folder. A shared report is a public report, which means that it is available to others in your company.

To promote One View Reports:

1. Access the Work with One View Report application (P952400) from the One View Reports (GH9115) menu.
2. On the Work with One View Reports form, verify that the Pending Promotion option is selected and click Find. Only reports that have not yet been promoted appear in the grid.
3. Select the reports you want to promote or reject by placing a check mark in the row header.
4. To promote the reports, select Approve Promotion from the Row menu. The reports can now be accessed by other users.
5. To verify that the reports were promoted, open BI Publisher to confirm that the reports were copied from one catalog to another. You should also see that the activity status has changed to "Shared."

On the BI Publisher server, the new shared reports are visible under the shared\JD Edwards\pathcode\app_id\report_name folder. However, they are not visible under any account that is not an administrator.

6. To reject the reports, select Reject Promotion from the Row menu.

3.4 Review One View Report Promotion History

To review One View Report promotion history:

1. Access the Work with One View Report application (P952400) from the One View Reports (GH9115) menu.
2. On the Work with One View Reports form, select either Pending Promotion or Show All, depending on which reports you want to review, and then click Find.
3. To review the promotion history of a report, select the report by placing a check mark in the row header and then select Row, Log.

On the Log Detail form, you can see more detail by selecting a log sequence in the grid and then selecting Row, Detail Message.

3.5 Delete One View Reports

You can delete any report, including a report that is pending approval. You can also delete multiple reports at one time. When you delete a report, the data model, report, and all templates are deleted.

To delete One View Reports:

1. Access the Work with One View Report application (P952400) from the One View Reports menu (GH9115).
2. On the Work with One View Reports form, select the Pending Promotion or All option and select Find.
3. Select the reports you want to delete by placing a check mark in the row header.
4. Select Delete.
5. When asked "Are you sure that you want to delete?" select Yes.
6. Verify that the reports were deleted on the BI Publisher server.

Note: If someone reserves a shared report, creates a personal report from it, and then deletes the personal report, then the reserve is released on the shared report. The shared report is not deleted.

3.6 Export One View Reports

Use the Exporting One View Reports application (P982402), version ZJDE0001, to export shared One View Reports into a .zip file that is saved on the local drive. Exporting is the only way to move reports from one BI Publisher server to another.

To export One View Reports:

1. Access the Work with Exporting One View Reports application (P982402) from the One View Reports menu (GH9115).
2. Select Add.

3. On the Exporting User Generated Contents form, enter a name for your export in the Export Name field.
4. Select One View Reports as the Object Type.
5. Use the QBE line to find the reports that you want to export in the grid.
6. Select each report that you want to export by placing a check mark in the row header.
7. Select OK.
8. In the File Download window, select Save.
9. Navigate to where you want to save the file and select Save. The file is saved to your selected location as a .zip file.
10. Select Close in the Download Complete window and select Close again on the File Download form.
11. Verify that the status description is "Completed Process."
12. To troubleshoot or review the details of the export process, select Log from the Row menu.
13. To view further log details, select the log sequence in the grid and then select Detail Message from the Row menu.

3.7 Import One View Reports

Use the Work with Importing One View Reports application (P982402), version ZJDE0002, to import a .zip file of One View Reports. You can use importing to move reports from one BI Publisher server to another BI Publisher server, move reports from one path code to another path code, and install any One View Reporting patches.

One View Reporting patches are delivered as zip files. You can download One View Reporting fixes from the Update Center. You install the patches by importing the One View Reports included in the zip file.

To import One View Reports:

1. Access the Work with Importing One View Reports application (P982402) on the One View Reports menu (GH9115).
2. Select Add.
3. On the Import User Generated Contents form, select the Load Import File button.
4. Select Browse, find the .zip file that you want to import, and then select Open.
5. On the File Upload form, select Load. On the Import User Generated Contents form, your .zip file appears with a status of "In Process."
6. Select OK to import the One View Reports.
7. Verify that your reports were loaded by selecting Find and finding your reports in the grid. You can also review the catalog in BI Publisher to verify that your reports were imported.
8. To troubleshoot or review the details of the import process, select Log from the Row menu.
9. To view further log details, select the log sequence in the grid and then select Detail Message from the Row menu.

3.8 Transfer One View Reports

Use the Work with Transferring One View Reports (P982403) application to transfer One View reports from one path code to another. The softcoding record of the logged in user is what decides which BI Publisher server is affected.

Note: The BI Publisher Server used for the "To Path Code" must be the same as the BI Publisher Server from which you are transferring the One View Reports.

If the target path code has a different BI Publisher Server, the Export/Import process must be used to facilitate the transfer process.

To transfer One View Reports:

1. Navigate to EnterpriseOne Menus, EnterpriseOne Life Cycle Tools, One View Reports, and open Work with Transferring One View Reports (P982403).
2. Select Add.
3. On the Transfer User Generated Contents form, enter a unique name for your transfer in the Transfer Name field.
4. Select One View Reports as the Object Type.
5. Use the QBE line to find the reports that you want to transfer.
6. Select each report that you want to transfer by placing a check mark in the row header.
7. Click Select.
8. On the Path Codes for Transfer form, select the To Path Code by placing a check mark in the row header and then click OK.
9. To verify that your transfer completed properly, search on your transfer name on the Work with Transferred Jobs form and make sure that the Process Status Description column contains "Completed Process."
10. To troubleshoot or review the details of the transfer process, select Log from the Row menu.
11. To view further log details, select the log sequence in the grid and then select Detail Message from the Row menu.

Administrative Tasks

This chapter contains the following topics:

- [Section 4.1, "One View Report and Log File Locations"](#)
- [Section 4.2, "Language Support"](#)
- [Section 4.3, "Troubleshooting"](#)
- [Section 4.4, "Performance Considerations"](#)
- [Section 4.5, "Scalability Considerations"](#)

4.1 One View Report and Log File Locations

One View reports are stored in the following locations:

- `<MW_Home>\user_projects\domains\bifoundation_domain\config\bipublisher\repository\Reports\JD Edwards`
- `<MW_Home>\user_projects\domains\bifoundation_domain\config\bipublisher\repository\Users\<user or proxy name>\JD Edwards`

BI Publisher log files are stored in the following locations:

- `<MW_Home>\user_projects\domains\bifoundation_domain\servers\AdminServer\logs`
- `<MW_Home>\user_projects\domains\bifoundation_domain\servers\AdminServer\logs\bipublisher`

The HTML server instance contains the actual One View Reporting and Web Services logs.

4.2 Language Support

Currently, the following languages are supported in One View Reporting:

- Arabic
- Chinese Simplified
- Chinese Traditional
- Czech
- Danish
- Dutch
- Finnish

- French - France
- German
- Greek
- Hungarian
- Italian
- Japanese
- Korean
- Polish
- Portuguese - Brazil
- Spanish
- Swedish
- Turkish
- Russian

JD Edwards EnterpriseOne users using the above languages need to set the JD Edwards EnterpriseOne user profile to indicate the appropriate language. At runtime, the system passes the user's language preference to BI Publisher to run the report in the user's language.

The user should also set the UI language for BI Layout Editor to the language of his choice. To set the language in BI Publisher Layout Editor, click on the User Name, then click "My Account". There are two settings related to language in the BI Publisher Layout Editor:

Report Locale

This is the language with which you run BI Publisher reports. You can leave this field blank and JD Edwards EnterpriseOne will pass the proper report locale using the JD Edwards EnterpriseOne user's language setting.

UI Language

This is the language of the menus and descriptions within the BI Publisher Layout Editor. You can change this to the appropriate language of your choice.

All of the delivered JD Edwards EnterpriseOne One View reports contain translations of the previously mentioned languages.

4.3 Troubleshooting

This section discusses some issues you might encounter and possible resolutions.

4.3.1 One View Menu Does Not Appear In Applications

If you cannot see the One View menu in the P01012 or other applications, make sure that:

- Your JD Edwards EnterpriseOne user mapping is set up correctly in P0092. It is case-sensitive.
- You can log into the BI Publisher server using the user ID and password.
- Your BI Publisher account has the BIAuthor role.

- The softcoding record is set up for the correct environment and user combination in P954000.
- Feature authorization for your user account and the form you are trying to access is set up correctly in P958974.

4.3.2 When Clicking On the One View Menu Icon, Nothing Happens

If nothing happens when you click on the One View menu icon, make sure that you clear your browser file cache.

4.3.3 One View Menu Loading But No Reports Appear

If you click on the One View menu icon, and see the word “Loading” but no reports appear, and you are using a version of Server Manager prior to 9.1.0.2, you must add a new One View JVM Setting for WebLogic 11g or WebSphere Application Server.

To add a new One View JVM Setting for WebLogic 11g:

1. Log on to the WebLogic Admin console.
2. Open Environment in the Domain Structure, and then select Servers.
3. Select the Server Start tab.
4. Add this JVM setting to the Arguments:

```
-Djavax.xml.rpc.ServiceFactory=oracle.j2ee.ws.client.ServiceFactoryImpl
```

To add a new One View JVM Setting for WebSphere Application Server:

1. Log on to the WebSphere Application Server Admin console as jde_user.
2. Go to Servers, Server Types, WebSphere Application Servers, AS_JS_88, Java and Process Management, Process Definition, and then Java Virtual Machine.
3. Add the following to the Generic JVM setting field and save:

```
-Djavax.xml.rpc.ServiceFactory=oracle.j2ee.ws.client.ServiceFactoryImpl
-Djavax.xml.soap.SOAPConnectionFactory=oracle.j2ee.ws.saaj.client.p2p.HttpSOAPConnectionFactory
```

Note: If you are using Server Manager 9.1.0.2 or a later version to install the JAS instance, this setting is added automatically.

4.3.4 Errors when Saving Reports

If you receive an error when you try to save a report, try the following:

- Make sure that your BI Publisher user and password mappings are setup correct in your user profile.
- Try restarting the BI Publisher server to fix the issue.
- If you see an invalid user and password error message in the HTML server error log, it indicates the user and password in the user profile do not match the BI Publisher server.
- Make sure that the JVM settings are configured correctly. See the [One View Menu Loading But No Reports Appear](#) section.

4.3.5 Errors in BIP Layout Editor on All Reports

If you receive a red error or “pdf not found” error while trying to render the One View Reports in BIP Layout Editor, make sure that:

- Your machine is inside of the company firewall using a cable network. If you are using a wireless network, it may be outside of the company fire wall.
- The BI Publisher server and HTML server are within the same firewall. If not, contact your IT Department to make sure that network security allows the BI Publisher server and HTML server to ping each other.
- If BI Publisher and the HTML server are in different domains, you are using the full address (IP address of full name with domain) to access the HTML server.

4.3.6 Failed to Save Report Error and Problem Running Shared Report

If you receive the error message “Failed to Save the Report” when attempting to save the Data Model for a report that you are creating, or if you are trying to run a shared report and all you see is a Processing popup message for a second and then nothing happens, you may have a problem with the JD Edwards EnterpriseOne connection to the BI Publisher server. After creating the BI Publisher users in BI Publisher, you must restart the BI Publisher server before trying to connect from JD Edwards EnterpriseOne.

4.3.7 Missing Boilerplates in Components Folder in BI Publisher

If you installed Oracle Business Intelligence Enterprise Edition (OBIEE) and BI Publisher on the same server, you might not see the Boilerplates functionality in the Components folder under the Shared Folders.

In order to reload the boilerplates feature:

1. Sign onto the BI Publisher server (<http://host:port/xmlpserver>).
2. Select Administration, System Maintenance, Server Configuration as shown:

Figure 4–1 Server Configuration

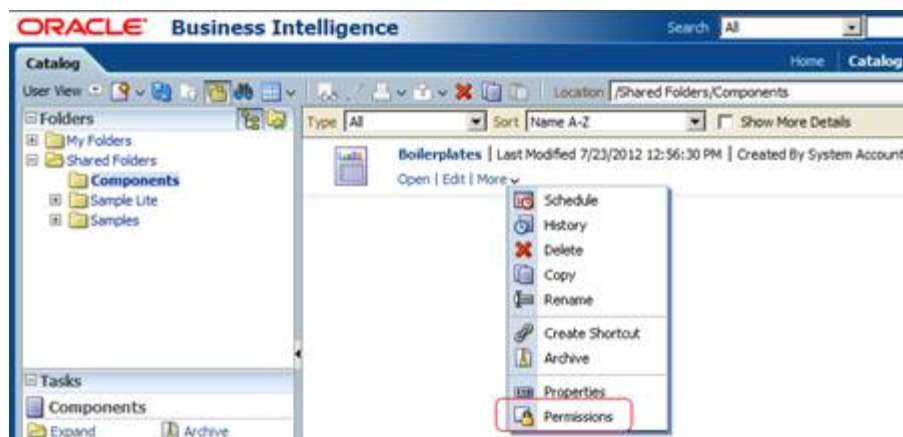


3. On the Catalog form, click the “Upload to BI Presentation Catalog” button.
A confirmation message appears in the upper right corner of the Administration page.
4. Click Apply to save the configuration.
5. Once the upload is completed, you see the Components enabled in the Shared Folders.

Note: Since this is an integrated BI Publisher in OBIEE, you cannot edit the permissions from BI Publisher; you need to edit security through OBIEE.

6. To edit permissions, sign into OBIEE (<http://host:port/analytics>).
7. Select “More” to open the drop-down menu, and then select Permissions.

Figure 4–2 Permissions



8. Review and edit the permissions accordingly.

4.3.8 Version Mismatch Error During Import of One View Reports

If you receive an error message stating that there is a version mismatch with the One View Reports and Soft Coding Version, then the Soft Coding Record is missing the property for the latest BI Publisher version.

4.4 Performance Considerations

The performance of each report depends on the number of rows each report retrieves, the amount of logic each report processes, and the number of graphical and tabular components on the report.

To improve the performance of a report:

1. Limit the number of rows each report retrieves.
2. Look at the number of event rules for each grid row that are being fetched on the One View Report applications.
3. Look at the graphical and tabular components in the report. Sometimes a pivot table with a large number of columns may take a long time to render. In this case, reduce the number of columns in the pivot table.

In general, it is a good idea to reduce the number of fields selected in the data model. This will speed up the report generation and rendering.

One View Reporting is an interactive solution that is not designed to retrieve tens of thousands of database records. If you need to work with a large amount of data, using either the Read Only JDBC driver or a UBE report will provide better performance.

4.5 Scalability Considerations

When you run a One View report, the HTML server retrieves the report data. The data is then passed to the BI Publisher server for report rendering and generation. This means that running a One View report adds more load to the HTML server and the back end database. The additional load is similar to adding more query users in the system.

Part II

One View Watchlists Administration (Release 9.1 Update 3)

This part of the book applies only to Tools Release 9.1 Update 3 and forward.

One View Watchlists represent collections of items that match user-defined criteria. They enable users to define information to which they would like to be alerted. For example, a user might want to be alerted to outstanding tasks that they need to do or thresholds that have been passed. Watchlists provide an easy way for this information to be conveyed to users.

One View Watchlists enable an administrator to secure which users can view, create, and share Watchlists. If there are existing Watchlists to which you have access, you will see the Watchlists menu on the menu bar within JD Edwards EnterpriseOne.

Watchlists are built from JD Edwards EnterpriseOne queries and are therefore, only supported on forms that support query functionality.

This part contains the following chapters:

- [Setting Up One View Watchlist Security](#)
- [Administrative Tasks for One View Watchlists](#)

Setting Up One View Watchlist Security

This chapter contains the following topics:

- [Watchlist Security Overview](#)
- [Setting Up Watchlist View Security](#)
- [Setting Up Watchlist Action Security](#)

5.1 Watchlist Security Overview

There are two types of security used for Watchlists:

- View Security, which allows a user to see shared Watchlists.
- Action Security, which allows a user to create Watchlists or create and share Watchlists.

You must set up security records in order to provide access to Watchlists. If no records are set up for a user, that user does not have any access to Watchlists.

Two versions of the Web Object Security application are delivered:

- ZJDE0001: This is the default version and has the functionality that is documented (e.g. click the View icon and it turns to a green circle.)
- ZJDE0002: When this version is used, the clickable option will not work from the entry form. The user must select a grid row entry to cause a revision form to display. The user can then click an icon to change to a green square. This option is intended for more conservative customers.

5.2 Setting Up Watchlist View Security

To set up Watchlist view security:

1. Enter P00950 in the Fast Path to open the Security Workbench.
2. From the Form menu, select Web Object Security and then select Web Object View.
3. Select Add.
4. On the Web Object View Security form, enter "ONEVIEW" in the Category field.
5. Enter "WATCHLIST" in the Sub-Category field.
6. You can also enter an application in the Application field and a user or role in the User/Role field.
7. Complete the following grid columns:

Grid Column	Value
User/Role	Enter the user or role for whom you want to set up security or enter *PUBLIC
Application Name	Enter the application name if applicable.
Form Name	Enter the form name if applicable.
Version	Enter the application version if applicable.
Web Object Name	Enter the One View Watchlist name if applicable.
Product Code	Enter the product code if applicable.
View	Select the View column to provide a user with the ability to view shared Watchlists. A green square appears in this column when selected.

Important: If the new record does not seem to be providing Watchlist view access to the user, the user may need to sign out and back into JD Edwards EnterpriseOne or you may need to access Server Manager and clear the JDBj Security cache.

5.3 Setting Up Watchlist Action Security

To set up Watchlist action security:

1. Enter P00950 in the Fast Path to open the Security Workbench.
2. From the Form menu, select Web Object Security and then select Web Object Action.
3. Select Add.
4. On the Web Object Action Security form, enter "ONEVIEW" in the Category field.
5. Enter "WATCHLIST" in the Sub-Category field.
6. You can also enter an application in the Application field and a user or role in the User/Role field.
7. Complete the following grid columns:

Grid Column	Value
User/Role	Enter the user or role for whom you want to provide access, or enter *PUBLIC.
Application Name	Enter the application name if applicable.
Form Name	Enter the form name if applicable.
Version	Enter the application version if applicable.
Product Code	Enter the product code if applicable.
Create	Select the Create column to provide a user with the ability to create personal Watchlists. When selected, a green circle appears in this column.

Grid Column	Value
Share	Select the Share column to provide a user with the ability to share, reserve, and update shared Watchlists. When selected, a green circle appears in this column.
Access Level	Select a value from the drop-down menu depending on the type of access you want to provide. This value will automatically populate if you select the Create or Share columns.



Tutorial: [Click here to view a recording of this feature.](#)

Important: If the new record does not seem to be providing Watchlist create or share access to the user, the user may need to sign out and back into JD Edwards EnterpriseOne or you may need to access Server Manager and clear the JDBj Security cache.

Administrative Tasks for One View Watchlists

This chapter contains the following topics:

- [Troubleshooting](#)
- [Performance Considerations](#)

6.1 Troubleshooting

This section discusses some issues you might encounter and possible resolutions.

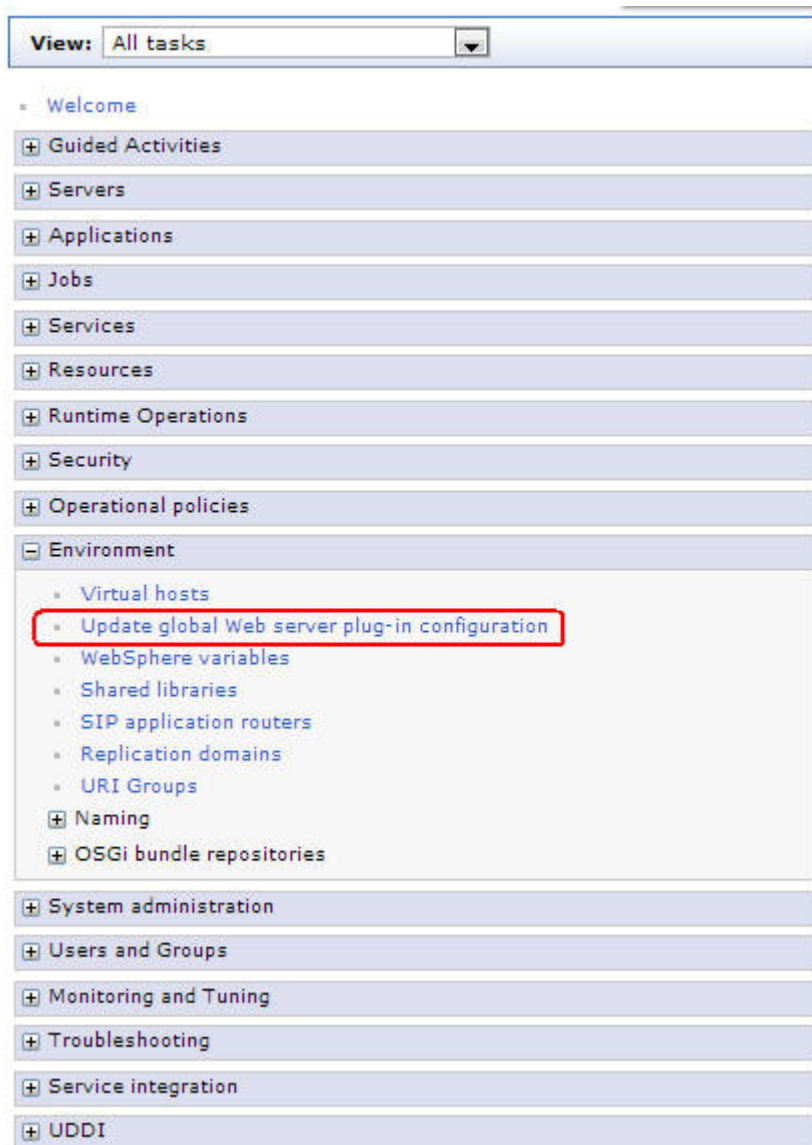
6.1.1 Watchlists Are Not Running

If you are using WebSphere Application Server and running JD Edwards EnterpriseOne as part of a federated or clustered web server, you may need to regenerate the WebSphere global plug-in configuration after deploying the newest Tools Release. This is required when new servlets have been added to the Tools Release you are deploying.

To regenerate the WebSphere global plug-in:

1. Open the WebSphere Application Server (WAS) console.
2. Open the Environment tree structure.
3. Select the “Update global Web server plug-in configuration” option.

Figure 6–1 Update Global Plug-in Configuration



4. Click OK to generate the new plug-in.
5. Restart the HTTP server to recognize the new file.

6.1.2 Update Failed - Query Not Found Error

You may see this error when the system attempts to update a Watchlist. It will occur if the query upon which a Watchlist is based has been deleted, or if the user does not have access to the query. For example, the query might be set up for a particular role that the user is not part of.

To correct the problem:

1. Verify that the query still exists.
2. Ensure that the user has permission to view the query by checking the application query security in P00950.

6.1.3 User Does Not Have Access to Watchlists

If you set up Web Object View or Web Object Action security for a user and that user still does not have access to Watchlists after signing out and back into JD Edwards EnterpriseOne, you may need to clear the security cache. Go into Server Manager and clear the JDBj security cache to resolve the issue.

6.2 Performance Considerations

Watchlists are designed with the goal of reducing the load on the web server. Running a Watchlist with a query requires less overhead than opening the associated application to get that same information. If users can get the information they need from the Watchlist menu without opening an application, this produces a net reduction in web server load and a net gain in productivity.

Having a Watchlist defined with a refresh interval of five minutes does not mean that the Watchlist will run every five minutes. A user action (for example, clicking on the Watchlist dropdown menu) causes the Watchlist to check the refresh interval to see if it should be updated. So Watchlists do not run without user action.

There are multiple configuration settings that help ensure that users cannot set up Watchlists that would adversely affect web server performance. These settings can be found in the Web Runtime section of Server Manager under the Web Objects Settings heading.

Web Objects Setting	Value
Default Max Records to Return for Watchlists	Specify the default value for the "Max Records to Return" field in the Watchlist Management tab. This is used when creating Watchlists.
Hard Upper Limit on Max Records to Return for Watchlists	Specify the largest value a user is allowed to enter in the "Max Records to Return" field for a Watchlist. The user receives an error if he exceeds this value when creating or editing a Watchlist.
Default Refresh Interval for Watchlists	Specify the default value in minutes for the "Refresh Interval" field in the Watchlist Management tab. This is used when creating Watchlists.
Hard Bottom Limit on Refresh Interval for Watchlists	Specify the smallest value in minutes that a user is allowed to enter in the "Refresh Interval" field for a Watchlist.
Number of Threads to Use for Updating Watchlists	Specify the maximum number of Watchlists per user that can update simultaneously.

For more information on creating Watchlists, see the *JD Edwards EnterpriseOne Applications One View Watchlists Implementation Guide*.

Glossary

BI Publisher data model

An object that contains a set of instructions for BI Publisher to retrieve and structure data for a report. Data models reside as separate objects in the catalog. It includes the sample grid data, form level information, and the reference to the data source.

BI Publisher Layout Editor

A web application that can be used to design all BI Publisher layouts.

BI Publisher layouts

A template file and a set of properties for rendering the template file that define how data is presented in the report. BI Publisher supports templates created from a variety of sources including Microsoft Word, Adobe Reader, Microsoft Excel, Adobe Flash, and BI Publisher's own layout editor. A report can include multiple layouts.

BI Publisher report

A report that consists of a reference to the BI Publisher data model, BI Publisher layouts, properties, and translations.

One View report

An integrated report that contains a JD Edwards EnterpriseOne report definition and a BI Publisher data model and report.

One View Watchlist

A collection of items that match user-defined criteria and contain information to which users have selected to be alerted.

personal report

A One View report that is located in a user's personal folder and owned by that person.

report definition

The JD Edwards EnterpriseOne metadata about the One View report. The report definition contains information about which columns are selected in the data model, the naming conventions, rowset setting, and the name of the report.

shared report

A One View report that is available system-wide, unless it is restricted by security settings. A user cannot directly modify a shared report. Shared reports must be promoted from personal reports by a power user.

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