# Oracle® Revenue Management and Billing for Financial Services

Version 2.2.3.0

Reports Installation Guide

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Oracle Revenue Management and Billing Reports Installation Guide

E20647-01

# Preface

## Purpose

Oracle Revenue Management and Billing (ORMB) may optionally be configured to use the reporting feature. You can generate reports from ORMB only if BI Publisher is integrated with ORMB.

ORMB provides you with 10 sample reports that you can use for reporting or as a starting point for creating a new report. These sample reports are not shipped with ORMB, but are available in the demonstration database. This document helps you to understand how to install reports in BI Publisher and ORMB. It also explains how to create new reports from scratch or using the sample report as a starting point.

## Intended Audience

The following are the intended audience of this document:

- Users
- Consulting staff
- Administrators

## Organization of the Document

The information in this document is organized into the following chapters:

| Chapter No. | Chapter Name | Chapter Description |
|---|---|---|
| Chapter 1 | Installing Reports | Lists and describes a set of activities that you need to complete so that you can use the reporting feature in ORMB |
| Chapter 2 | Defining a New Report | Explains how to define a new report from scratch in ORMB. |
| Chapter 3 | Using Sample Report as a Starting | Explains how to define a new report using an existing report |

## Conventions

| Convention | Meaning |
|---|---|
| boldface | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary |
| *italic* | 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 |

# Related Documents

The following documents are related to this document:

- *Oracle Revenue Management and Billing Release Notes* - Describes enhanced features and known issues in the release 2.2.3 of ORMB.
- *Oracle Revenue Management and Billing Banking User Guide* – Explains how to use the features of ORMB.

# Contents



 

# Chapter 1: Installing Reports

This chapter lists and describes a set of activities that you need to complete so that you can use the reporting feature in ORMB.

## Installing Oracle BI Publisher Enterprise

You must install Oracle BI Publisher Enterprise on the Windows, AIX and Linux platforms. You can download the Oracle BI Publisher Enterprise for these platforms from http://edelivery.oracle.com/.

To install Oracle BI Publisher Enterprise on Windows:

1. Double-click on the BIPublisherDesktop.exe file. The Choose Setup Language wizard page appears.

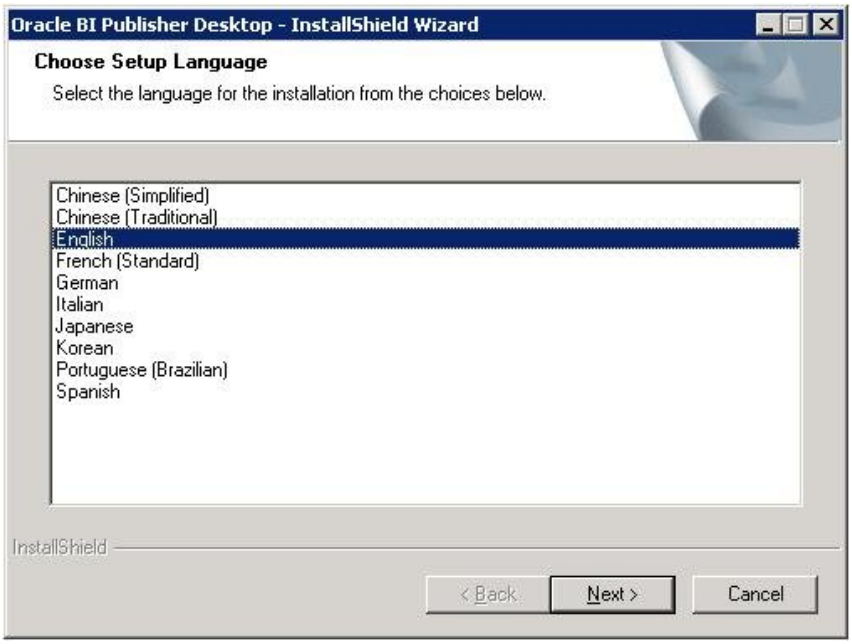


**Figure 1 : Choose Setup Language Wizard Page**

2. Ensure that the English language is selected and click Next. The Welcome wizard page appears.

 

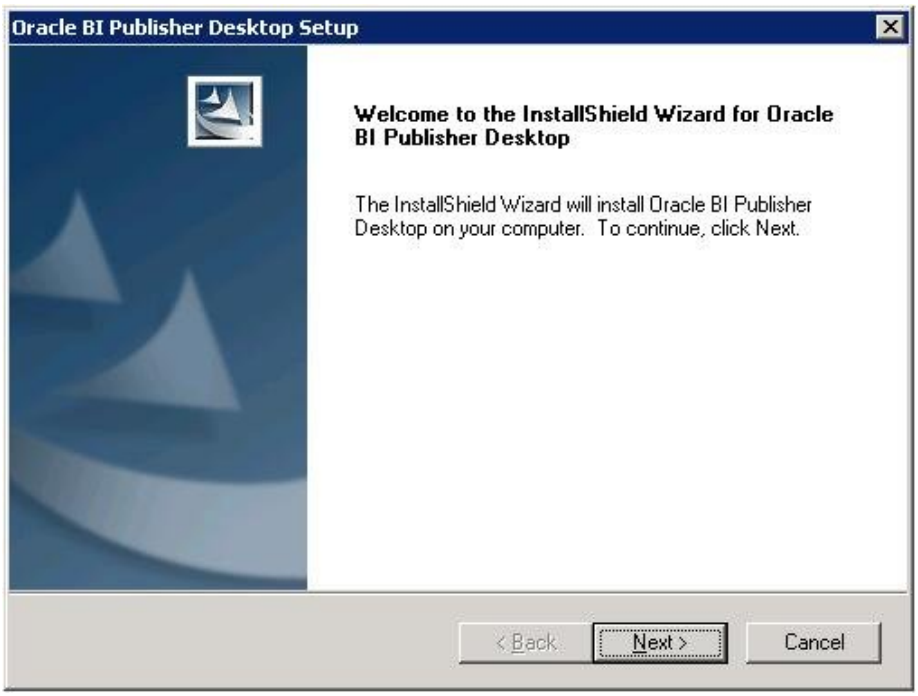


**Figure 2 : Welcome Wizard Page**

3. Click Next. The Choose Destination Location wizard page appears.


**Figure 3 : Choose Destination Location Wizard Page**

Note: If you want to install the files in any other location, then click Browse and select the location.

4. Click Next. The Setup Status wizard page appears.

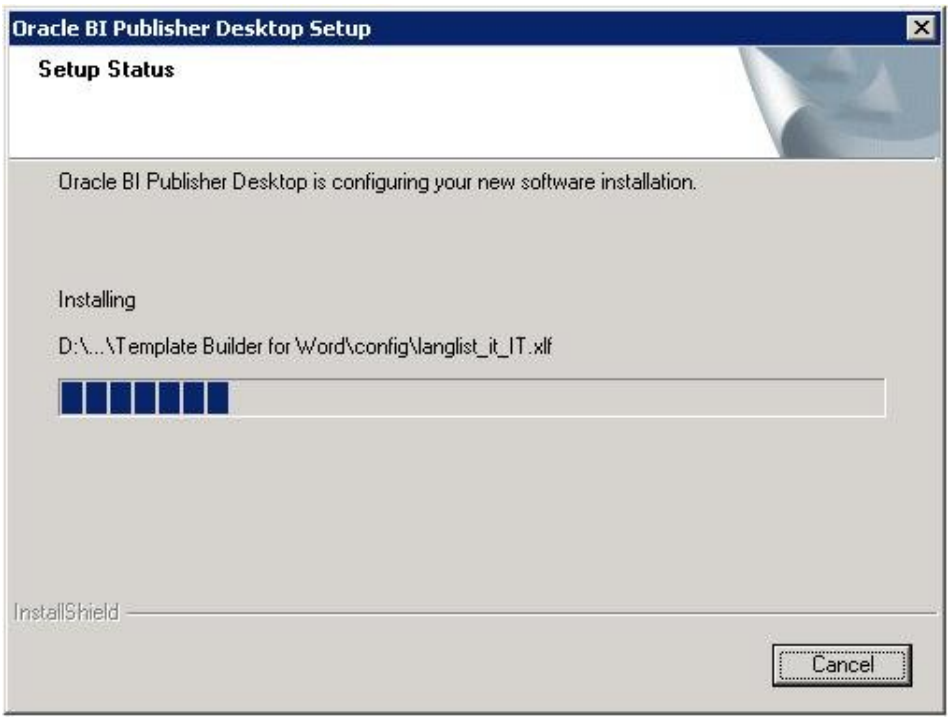


**Figure 4 : Setup Status Wizard Page**

Once Oracle BI Publisher Desktop is installed, the InstallShield Wizard Complete wizard page appears.

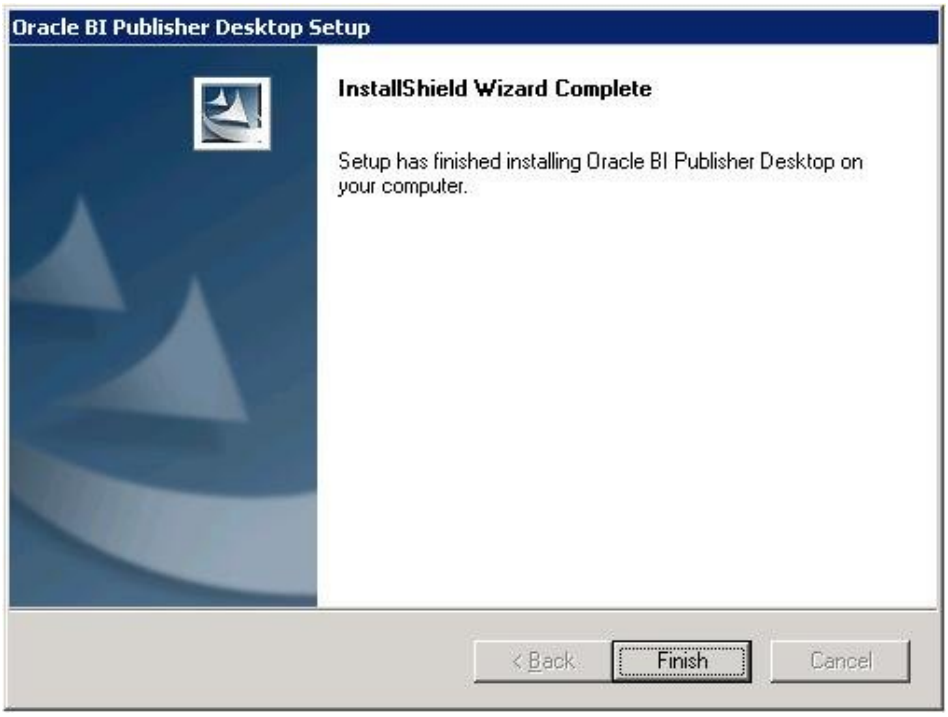


**Figure 5 : InstallShield Wizard Complete Wizard Page**

5. Click Finish.
6. Double-click on the Setup.exe file. The Oracle Universal Installer window appears.

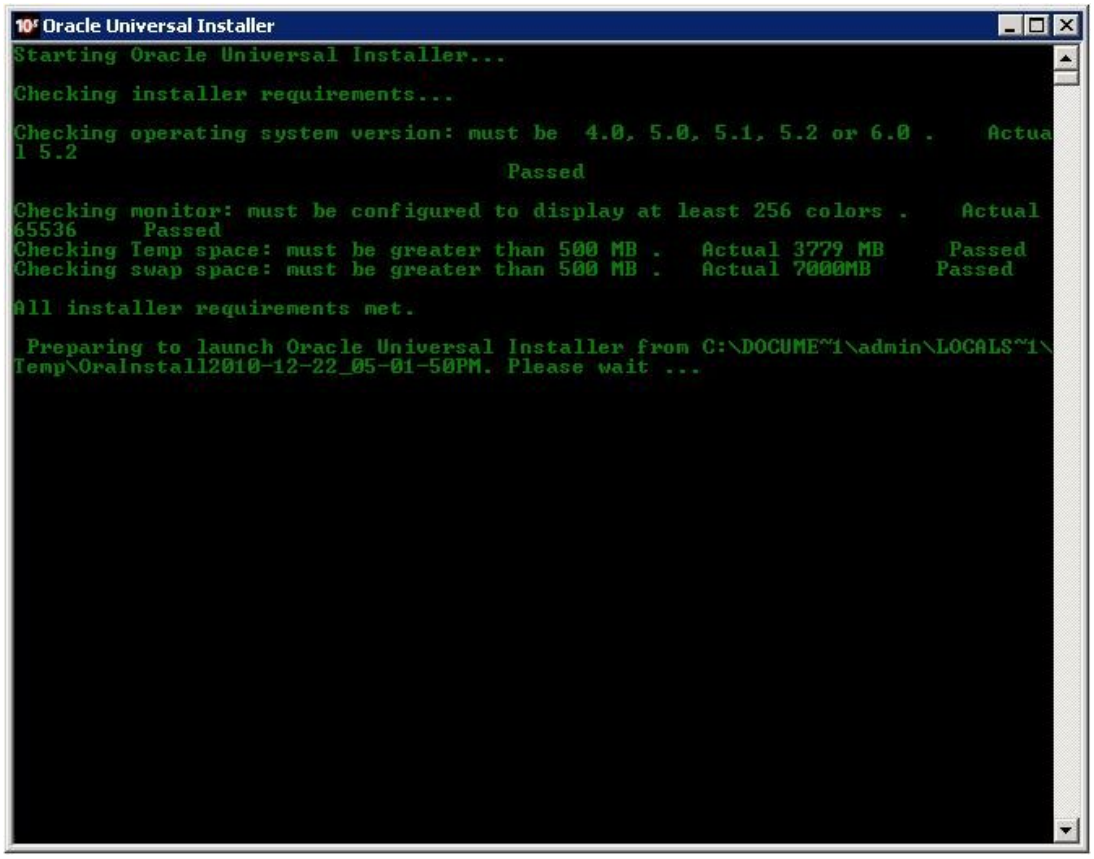


**Figure 6 : Oracle Universal Installer**

Once the installation requirements verification is done, the Welcome wizard page appears.

 

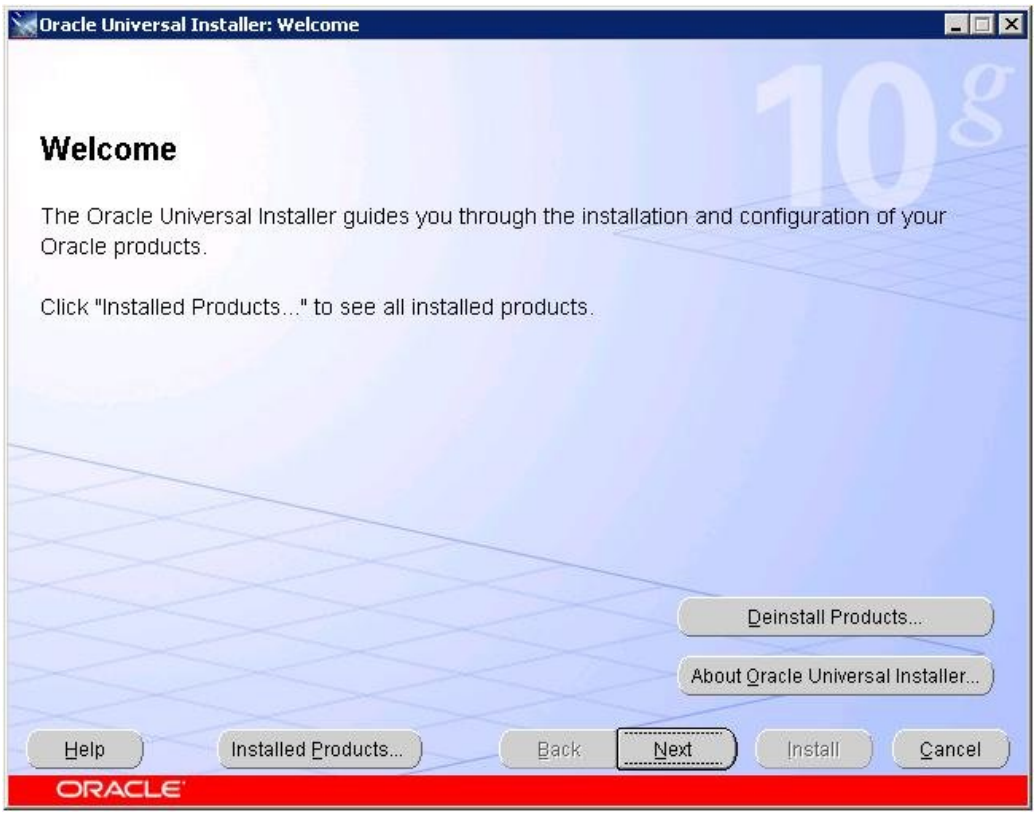


**Figure 7 : Welcome Wizard Page**

7. Click Next. The Specify File Locations wizard page appears.

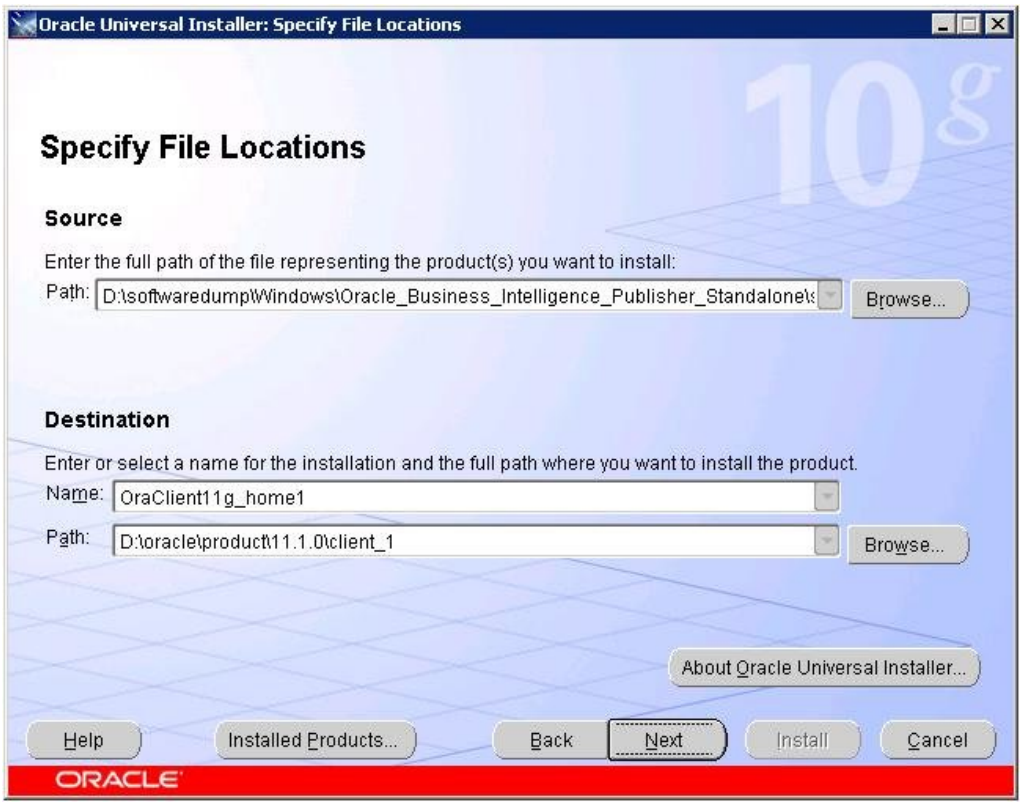


**Figure 8 : Specify File Locations Wizard Page**

8. Verify the paths and click Next. The Select Installation Type wizard page appears.

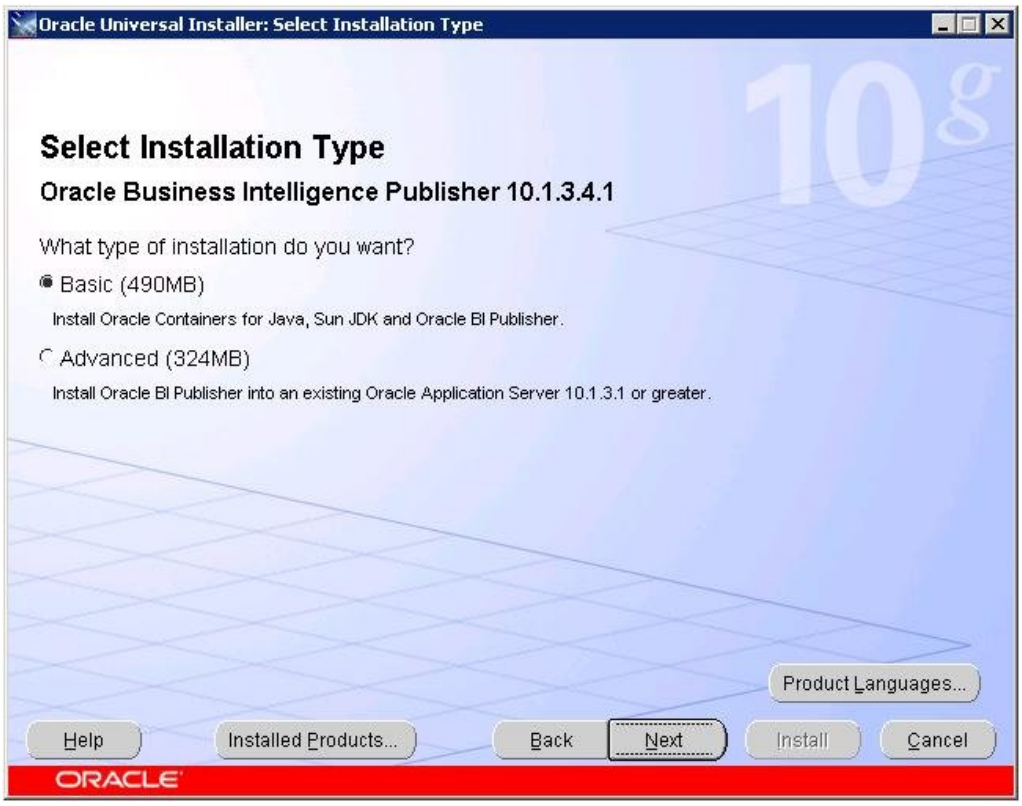


**Figure 9 : Select Installation Type Wizard Page**

9. Select the type of installation and click Next. The Choose OC4J Administrator Password wizard page appears.

 


**Figure 10 : Choose OC4J Administrator Password Wizard Page**

10. Enter and confirm the password for the administrator.
11. Click Next. The Install wizard page appears.

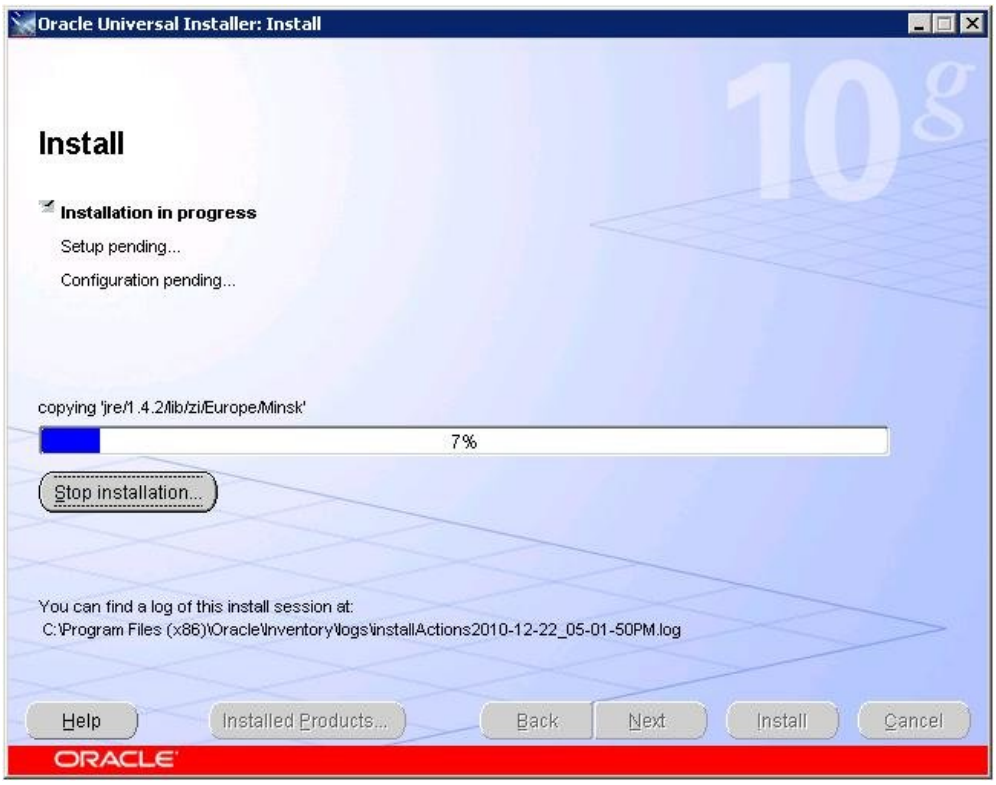


**Figure 11 : Install Wizard Page**

Once the installation is done, the End of Installation wizard page appears.

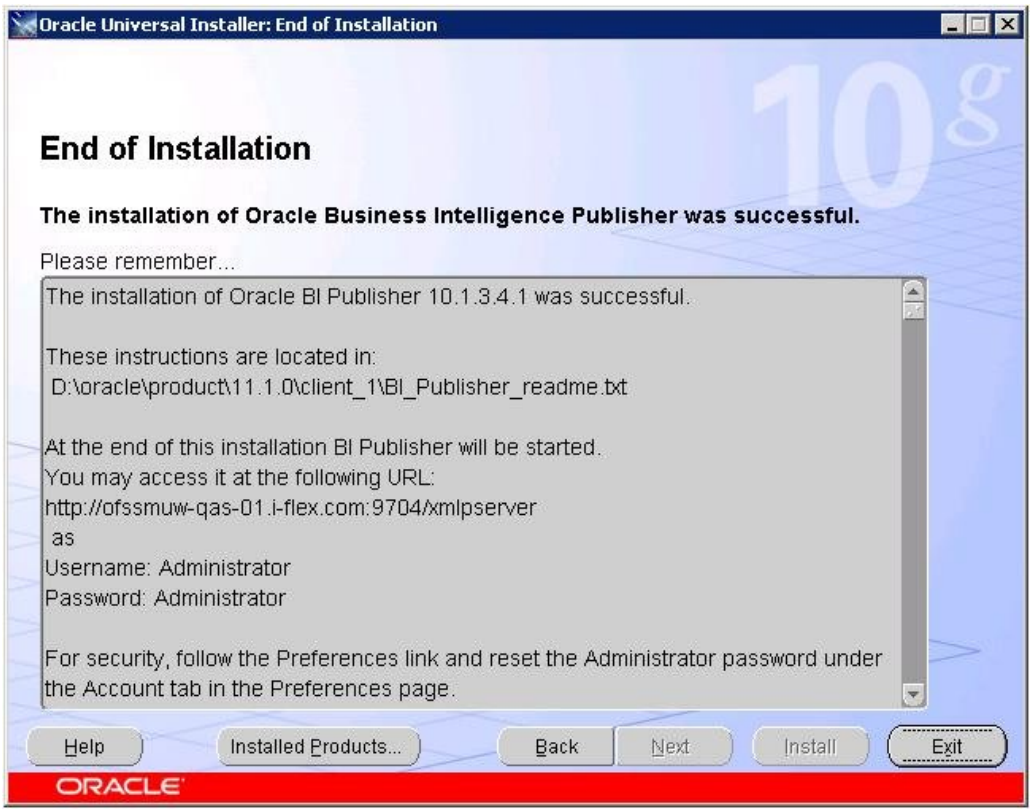


**Figure 12 : End of Installation Wizard Page**

12. Note the URL and login credentials, and click Exit. The Exit dialog box appears.

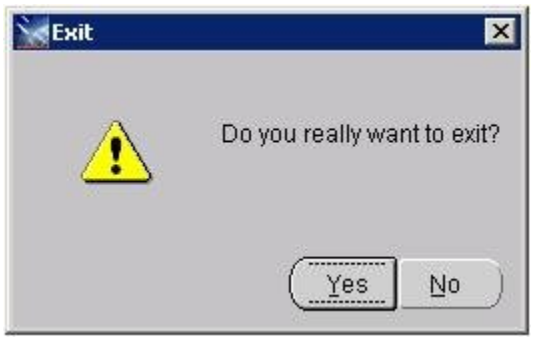


**Figure 13 : Exit Dialog Box**

13. Click Yes to exit. The

Similarly, install Oracle BI Publisher Enterprise on the AIX and Linux platforms.

Note:

Oracle BI Publisher Enterprise Edition 10.1.3.3.x and 10.1.3.4.x have been used to develop sample reports that are provided with Oracle Revenue Management and Billing (ORMB). Oracle BI Publisher Enterprise Edition 10.1.3.X.X has been used on Windows and UNIX servers for testing the integration with ORMB and generating reports. The report layouts have been created using Oracle BI Publisher Desktop 10.1.3.2. The sample reports and integration may not work with other Oracle BI Publisher Enterprise versions.

 

You must install X server on UNIX and Linux machines where Oracle BI Publisher is installed; otherwise the images will not get generated properly in the reports. However, there is a workaround for this issue. If you are using Java 1.4.2 or any later version, then run the environment with a headless implementation. To do this, specify the following from Java command line:

```
-D java.awt.headless = true
```

# Configuring ORMB to Invoke BI Publisher

You need to configure ORMB to invoke Oracle BI Publisher Enterprise from within ORMB. To configure, you need to:

1. Set Installation Options
2. Set Reporting Options

## Setting up Installation Options

ORMB provides an installation algorithm plug-in spot called Reporting Tool. This plug-in spot should contain an algorithm that invokes your reporting tool in real-time.

To set up the installation options:

1. Login to ORMB.
2. Create an algorithm using the F1-BIPR-INV algorithm type, which invokes Oracle BI Publisher.
3. Attach this algorithm on the Reporting Tool algorithm spot in the Algorithms tab of the Installation Options – Framework screen.

## Setting up Reporting Options

The algorithm that you define using the F1-BIPR-INV algorithm type needs information, such as the reporting folder, reporting server and so on to access Oracle BI Publisher from within ORMB. You can provide this information by setting the reporting options.

To set up the reporting options:

1. Login to ORMB.
2. Select Admin Menu → R → Reporting Options. The Reporting Options screen appears. It contains the following fields:

| Field | Description |
|---|---|
| Report Option | Used to specify the reporting option. |
| Value | Used to specify the value of the reporting option. |

3. Set the following reporting options:

| Reporting Option | Description | Value |
|---|---|---|
| Reporting Folder | Used to specify the name of the BI Publisher Shared folder created for storing reports. | ORMB<br><br>Note: You can use any other name, but you will then have to create a folder with the same name at the following location: C:\oracle\BI101332\xmlp\XMLP\Reports |
| Reporting Server | Used to specify the URL of the server where Oracle BI Publisher is installed. | You must specify the URL in the following format:<br><br>Error! Hyperlink reference not valid. Publisher Server>:<port> |
| Suppress User Credentials (Y/N) | Used to indicate whether user credentials must be suppressed while generating a report. | Y |

4. Click Save.

Note: In case you need any additional information to access Oracle BI Publisher from within ORMB, you can add additional reporting options in the Report Option list. To add additional reporting options, you need to define additional field values for the RPT_OPT_FLG field in the Look Up screen.

# Publishing Sample Reports in Oracle BI Publisher Enterprise

ORMB provides you with 10 sample reports that you can use for reporting or as a starting point for creating a new report. You can use these reports only when you publish them in Oracle BI Publisher Enterprise.

To publish these sample reports in Oracle BI Publisher Enterprise:

1. Download the Reports.zip file from http://edelivery.oracle.com.
2. Unzip the Reports.zip file.

Note: By default, the files extracted from the zipped folder are read only. You must change the permissions on these files before making any changes in these files.

3. Navigate to the `..\Reports\BIPublisher\reportFiles` folder to view the report files.
4. Create a folder named ORMB at the following location where BI Publisher is installed:

   `..\xmlp\XMLP\Reports`

Note:

You can create a folder with any other name, but you will then have to change the reporting folder value in the Reporting Options screen.

 

If you install Oracle BI Publisher Enterprise in a location other than C:\oracle\BI101332, you need to create the ORMB folder in the respective location.

5. Copy all the sample reports from the `..\Reports\BIPublisher\reportFiles` folder to the `..\xmlp\XMLP\Reports\ORMB` folder.
6. Login to the BI Publisher Server as Administrator.
7. In the Reports tab, navigate to the `Shared Folders\ORMB` folder.
8. For each report, click the Edit hyperlink corresponding to the report and ensure that the Run report online check box is selected in the Report Properties page. Otherwise, you will not be able to view the reports from ORMB.
9. Also, ensure that you specify the data source in the Default Data Source field. For more information on how to create a data source, refer to the Creating a Data Source section.

# Creating the RPTUSER

Each report has one or more corresponding database function or package that stores the business logic to fetch the data from the database. This data is then presented in the report. You can fetch the data from the database only using the database user credentials and therefore, you must create a user called RPTUSER. This user should have read access to all the ORMB database objects and execution privilege on the stored procedures which are accessed by the reports.

To create the RPTUSER user:

1. Navigate to the `..\Reports\BI-Publisher\functions\oracle` folder.
2. Open the CDX_rptuser.sql file.
3. If required, change the password and the default and temporary tablespace names for the user.
4. Save the changes.
5. Login to the target database as a DBA user using SQLPLUS and execute the following command at SQL prompt:

   ```
   @<path>\CDX_rptuser.sql;
   ```

   You must replace the `<path>` placeholder with the entire path where the CDX_rptuser.sql file is stored.
6. Execute the following command at SQL prompt to commit the transaction:

   ```
   commit;
   ```

# Creating Oracle Functions and Packages

Once the RPTUSER is created, you need to create Oracle functions and packages for these sample reports in the target database. To create the Oracle functions and packages:

1. Log into the target database as the user who owns ORMB schema objects using SQLPLUS and execute the following command at SQL prompt:

   ```
   @<path>\CDX_rptfn.sql;
   ```

   You must replace the `<path>` placeholder with the entire path where the CDX_rptfn.sql file is stored.

2. Execute the following command at SQL prompt to commit the transaction:

   ```
   commit;
   ```

# Compiling Invalid Objects

If any error occurs while creating Oracle functions and packages for these sample reports in the target database, you need to compile the invalid objects.

To compile the invalid objects:

1. Execute the following command at SQL prompt:

   ```
   @<path>\CDX_compfn.sql;
   ```

   You must replace the `<path>` placeholder with the entire path where the CDX_rptfn.sql file is stored.

2. Execute the following command at SQL prompt to commit the transaction:

   ```
   commit;
   ```

# Security Configuration

Using the OraGenSec.exe utility, you need to create synonyms in RPTUSER and grant privileges to them to execute the stored procedures and read the ORMB tables.

To define the security configuration:

1. Execute the following command at the command prompt:

   ```
   OraGenSec.exe
   ```

   You will be prompted to enter the following:

   Enter the Oracle user that owns the schema (e.g. CISADM): `CISADM`

   Enter the password for the CISADM user: `CISADM`

   Enter the name of the Oracle Database: `<database name>`

   Enter a comma-separated list of Oracle users in which synonyms need to be created (e.g. cisuser, cisread): `RPTUSER`

2. Press Enter.

# Configuring the BI Publisher Server

While configuring the BI Publisher Server, you need to:

- Create a Data Source
- Create a User-Defined Role
- Grant Access to the Existing Folders
- Grant Access to the Data Sources
- Assign System-Defined Roles to a User-Defined Role
- Create a User

 

- Assign a Role to a User

# Creating a Data Source

To create a data source:

1. Login to the BI Publisher Server as Administrator.
2. Click the Admin tab. The Admin page appears.

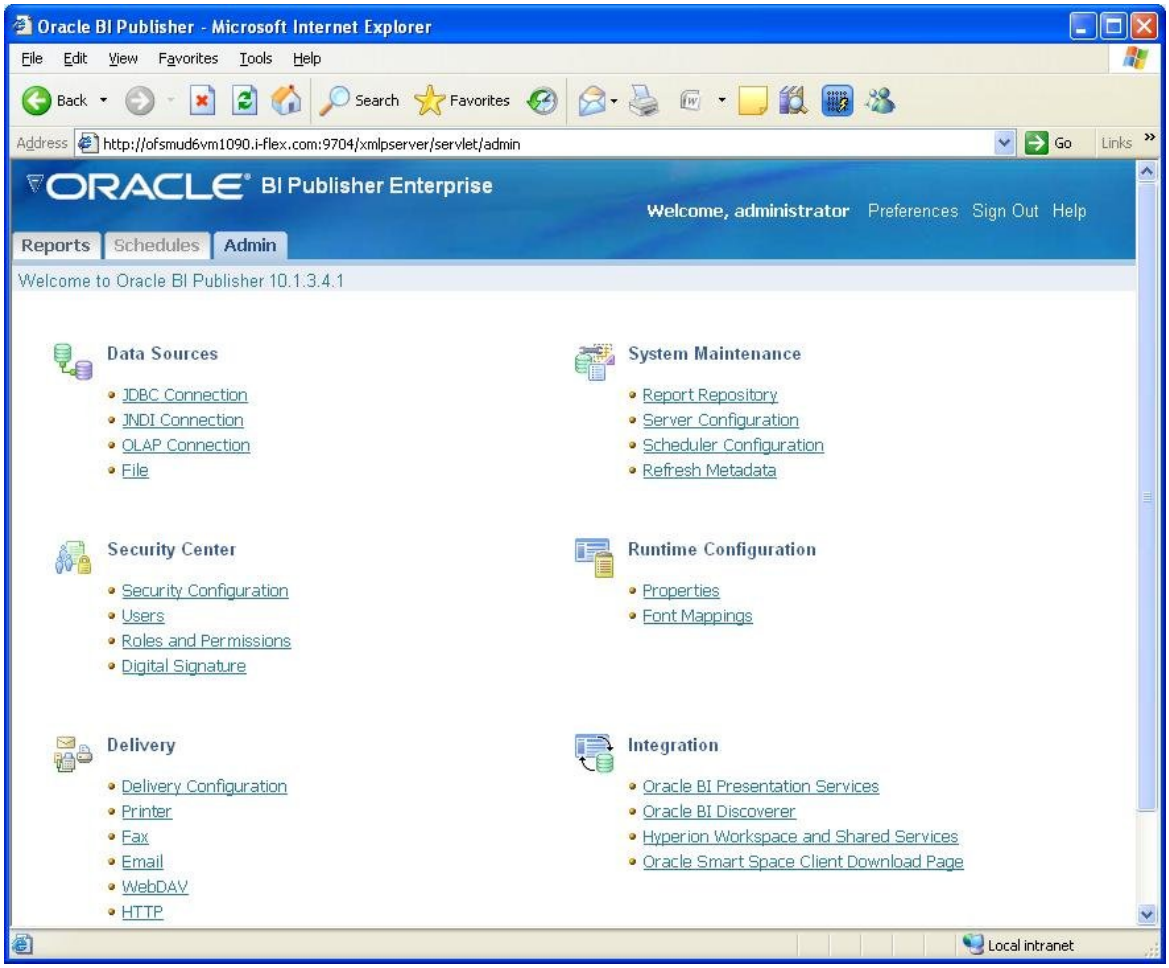


**Figure 14 : Admin Page**

3. Under the Data Sources section, click the JDBC Connection link. The JDBC page appears with a list of existing JDBC connections.

 

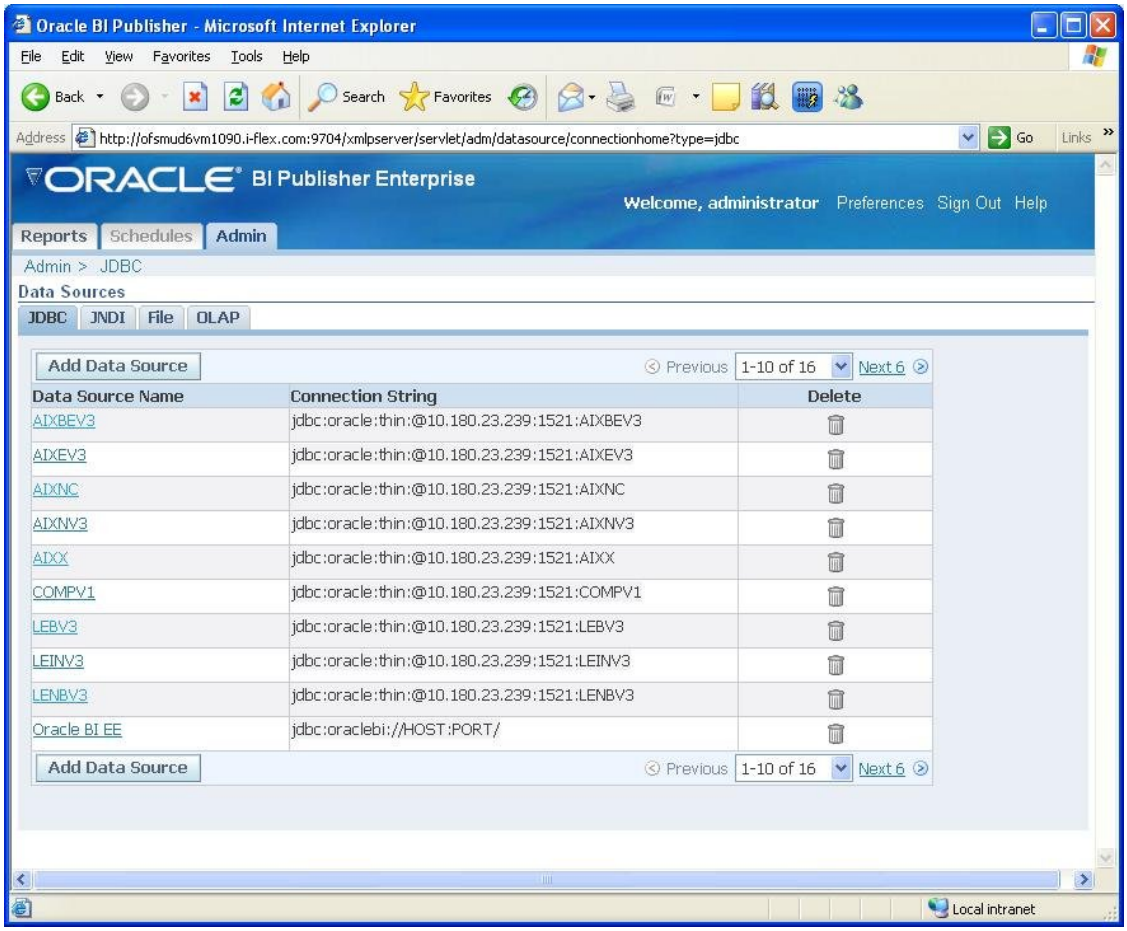


**Figure 15 : JDBC Page**

4. Click Add Data Source to add a new data source. The Add Data Source page appears.

 

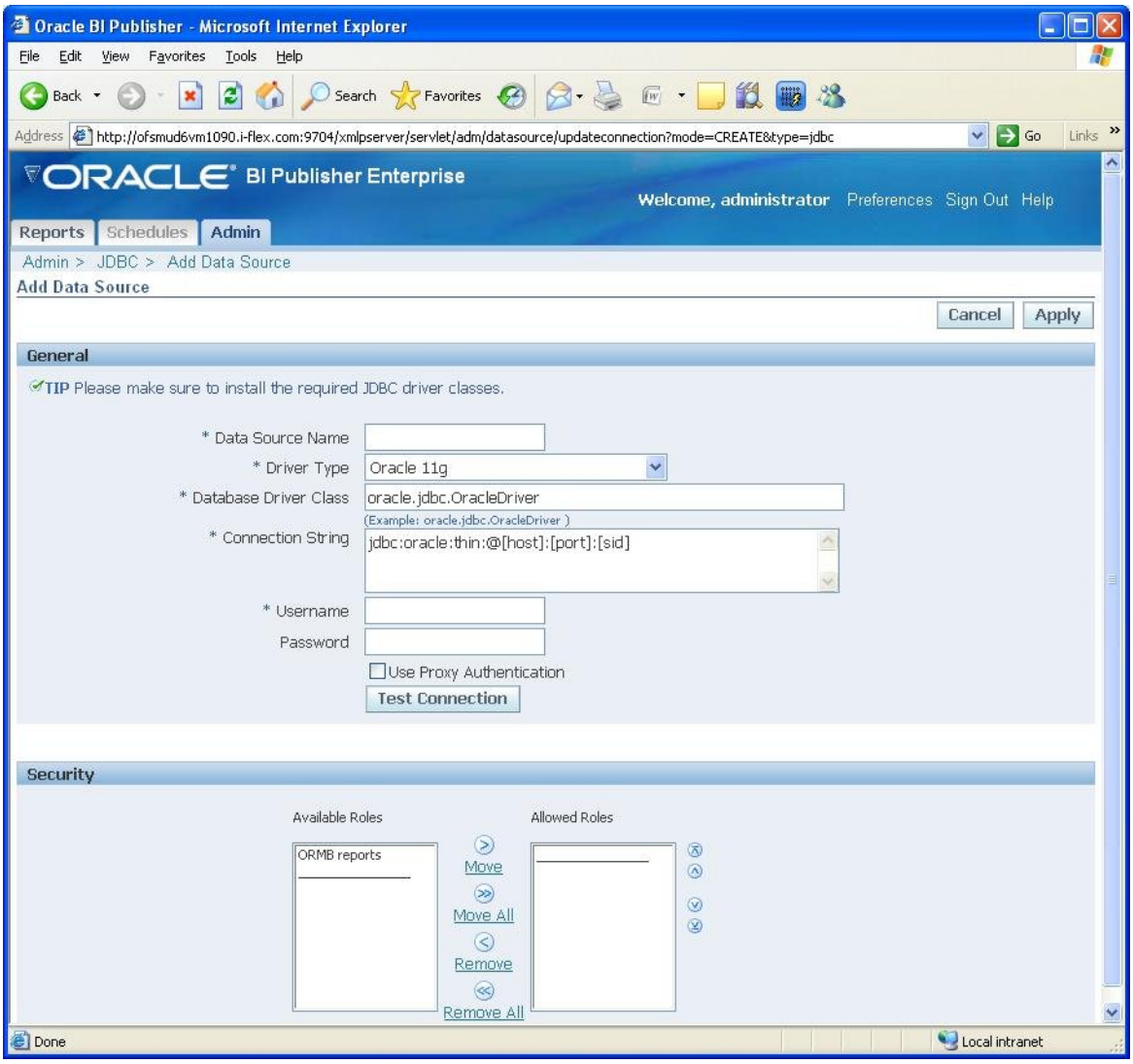


**Figure 16 : Add Data Source Page**

The Add Data Source page contains the following two sections:

- General – Allows you to specify details of a new JDBC connection. It contains the following fields:

| Field | Description |
|---|---|
| Data Source Name | Used to specify the name of the data source. |
| Driver Type | Used to select the database type from the list. |
| Database Driver Class | When you select a driver type, the database driver class is automatically displayed in this field. You can update this field if required. |
| Connection String | Used to specify the database connection string. When you select a driver type, the appropriate connection string format for the selected database type is displayed in this field. For Oracle database, the connection string must be in the following format:<br>jdbc:oracle:thin@server:port:sid |
| Username | Used to specify the user name to access the database. |

 

| Field | Description |
|---|---|
| Password | Used to specify the password to access the database. |
| Use Proxy Authentication | When you select the Use Proxy Authentication check box, BI Publisher passes the user name and password of the individual user (as logged into BI Publisher) to the data source and thus preserves the client identity and privileges when the BI Publisher server connects to the data source. |

- Security – Allows you to select the user-defined roles to which you want to grant access to the data source.

5. Enter the data source name as ORMB.
6. Enter the connection details, such as Driver Type, Database Driver Class and Connection String of the ORMB database.
7. Enter the user name and password as RPTUSER.
8. Click Test Connection. A confirmation message appears indicating that the connection established successfully.
9. Click Apply. The data source is added to the JDBC connection list.

# Creating a User-Defined Role in BI Publisher

To create a user-defined role in BI Publisher:

1. Login to the BI Publisher Server as Administrator.
2. Click the Admin tab. The Admin page appears.
3. Under the Security Center section, click the Roles and Permissions link. The Roles and Permissions page appears with a list of existing roles.

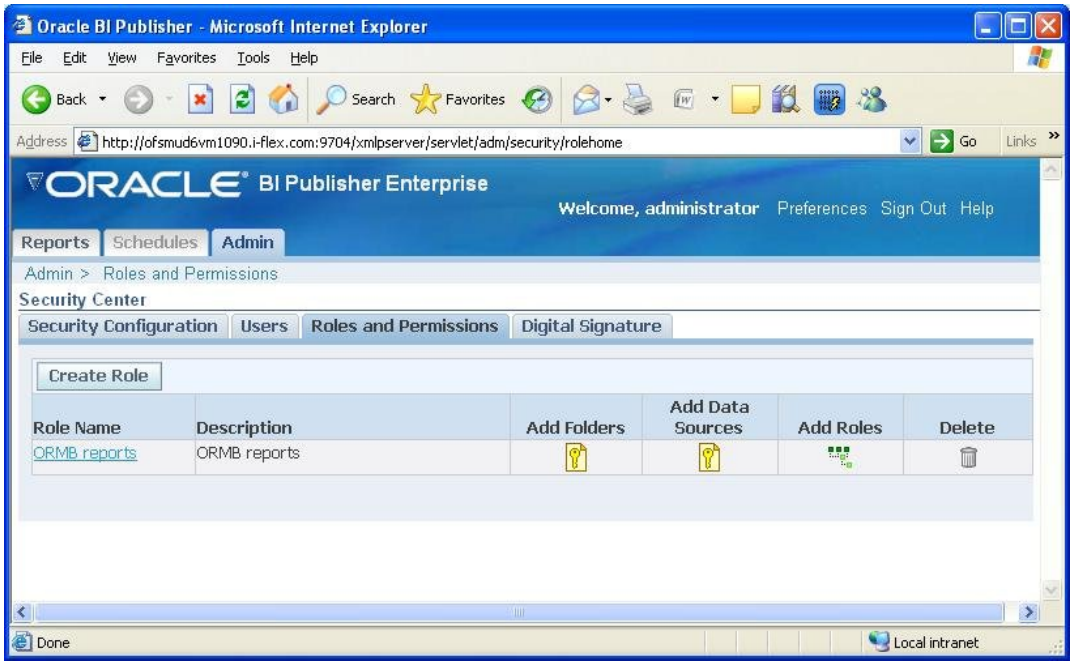


**Figure 17 : Roles and Permissions Page**

4. Click Create Role to create a new role. The Create Role page appears.

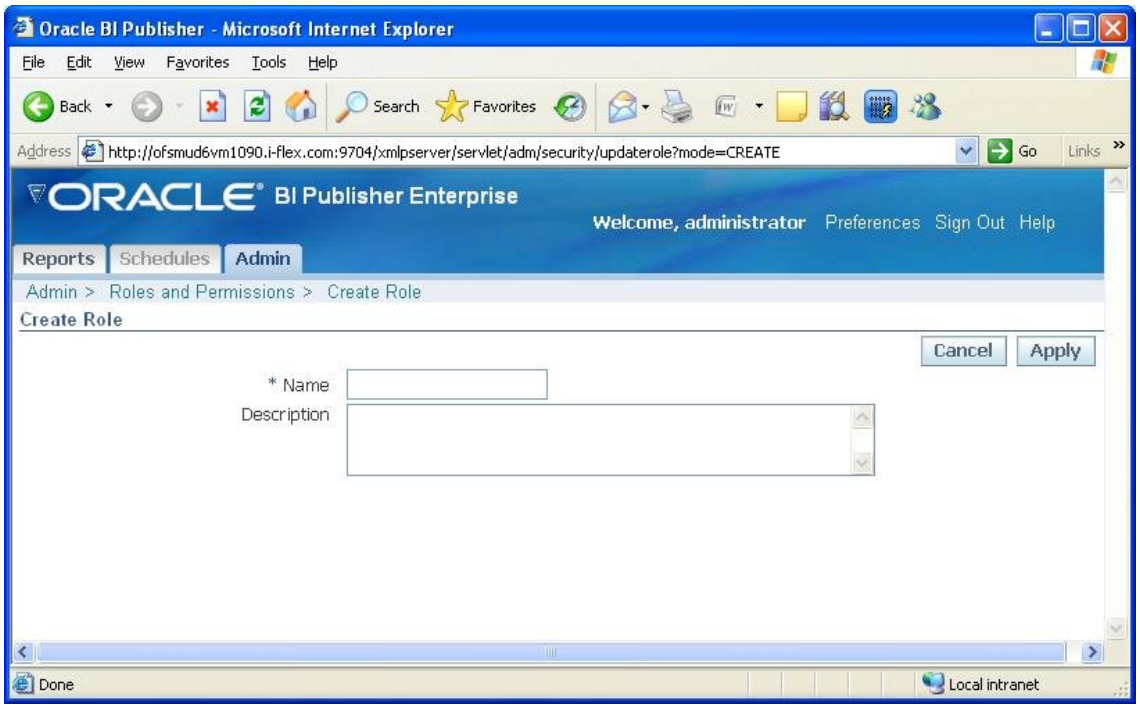


**Figure 18 : Create Role Page**

5. Enter the name of the role. For example, enter Reporting Analyst.
6. Enter the description of the role.
7. Click Apply. The role is added to the Roles list.

# Granting Access to the Existing Folders

You will be able to access a folder only if the role assigned to you has access to that folder. To grant access to the existing folders:

1. Login to the BI Publisher Server as Administrator.
2. Click the Admin tab. The Admin page appears.
3. Under the Security Center section, click the Roles and Permissions link. The Roles and Permissions page appears with a list of existing roles.
4. Click the Add Folders icon corresponding to the role to which you want to grant access to the existing folders. The Add Folders page appears.

 

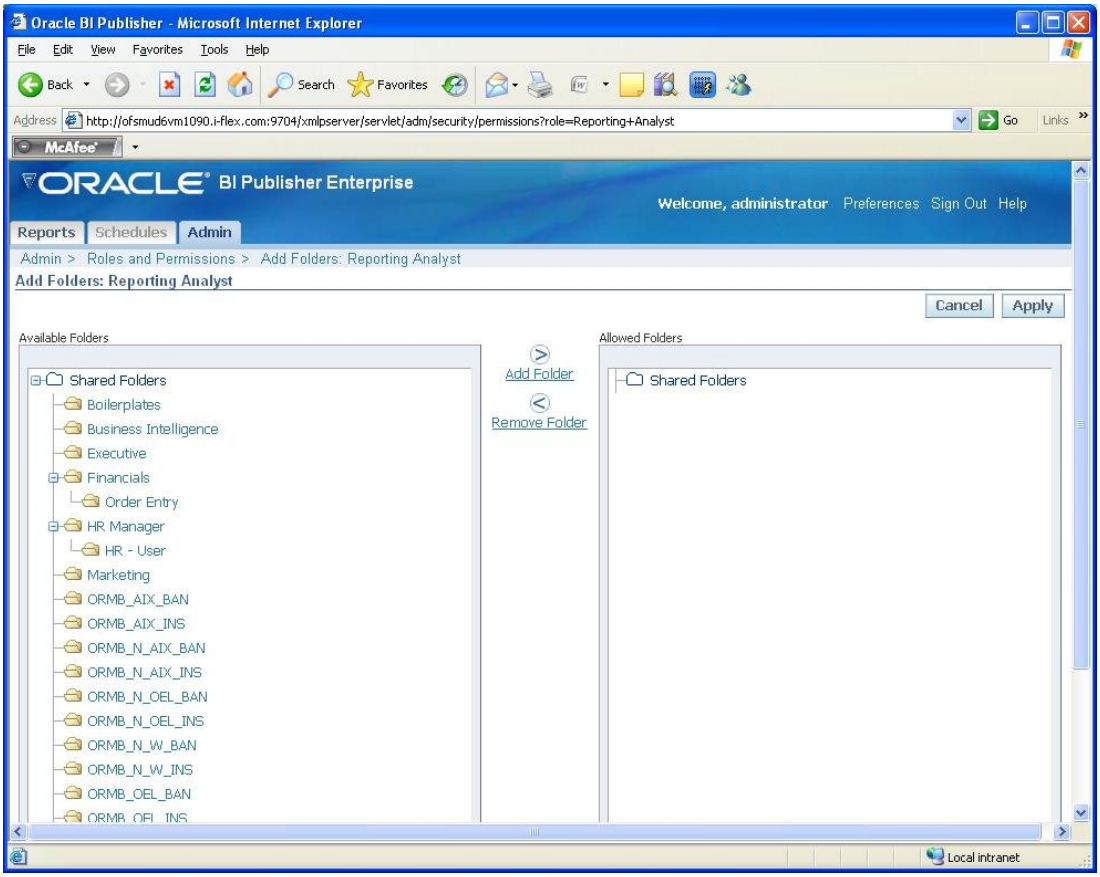


**Figure 19 : Add Folders Page**

5. Select the folder (to which you want to grant access) in the Available Folders list and click the Add Folder (>) button. The selected folder is moved to the Allowed Folders list.
6. Click Apply. The Roles and Permissions page appears.

# Granting Access to the Data Sources

You will be able to connect to a database using a data source only if the role assigned to you has access to that data source. To grant access to a data source:

1. Login to the BI Publisher Server as Administrator.
2. Click the Admin tab. The Admin page appears.
3. Under the Security Center section, click the Roles and Permissions link. The Roles and Permissions page appears with a list of existing roles.
4. Click the Add Data Sources icon corresponding to the role to which you want to grant access to the data source. The Add Data Sources page appears.

 

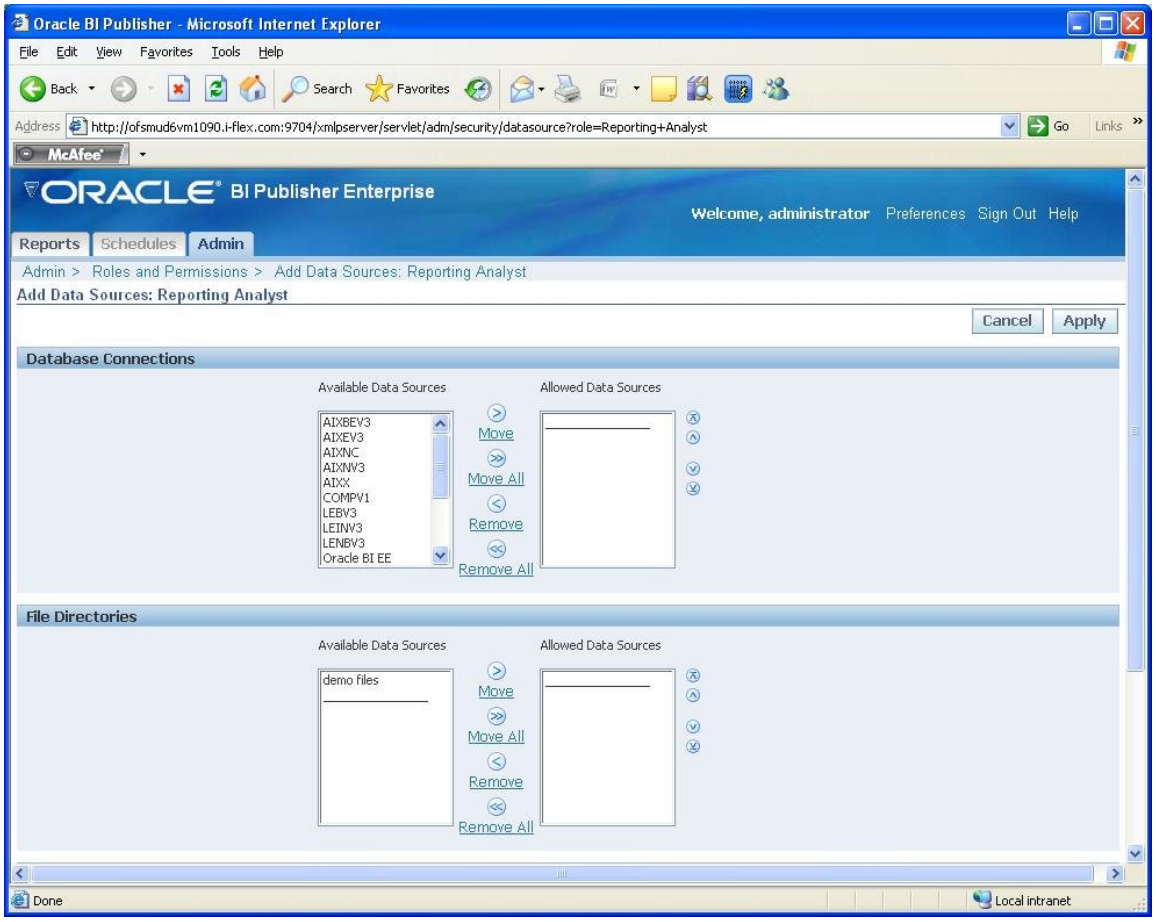


**Figure 20 : Add Data Sources Page**

5. Select the data source (to which you want to grant access) in the Available Data Sources list and click the Move ( ) button. The selected data source is moved to the Allowed Data Sources list.
6. Click Apply. The Roles and Permissions page appears.

# Assigning System-Defined Roles to a User-Defined Role

You will be able to perform a set of activities in the BI Publisher only if the user-defined role assigned to you has been assigned one or more system-defined roles. To assign the system-defined roles:

1. Login to the BI Publisher Server as Administrator.
2. Click the Admin tab. The Admin page appears.
3. Under the Security Center section, click the Roles and Permissions link. The Roles and Permissions page appears with a list of existing roles.
4. Click the Add Roles icon corresponding to the role to which you want to assign the existing system-defined roles. The Add Roles page appears.

 

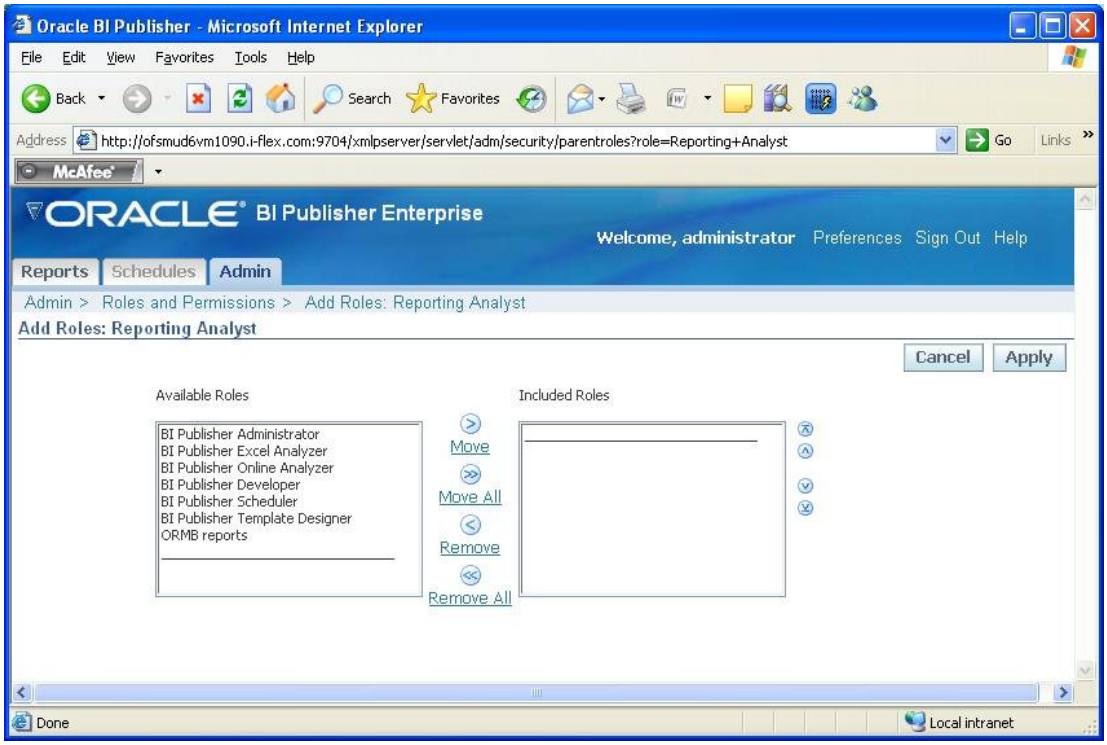


**Figure 21 : Add Roles Page**

5. Select the system-defined role in the Available Roles list and click the Move ( ) button. The selected role is moved to the Included Roles list.
6. Click Apply. The Roles and Permissions page appears.

# Creating a User in BI Publisher

To create a user in BI Publisher:

1. Login to the BI Publisher Server as Administrator.
2. Click the Admin tab. The Admin page appears.
3. Under the Security Center section, click the Users link. The Users page appears with a list of existing users.

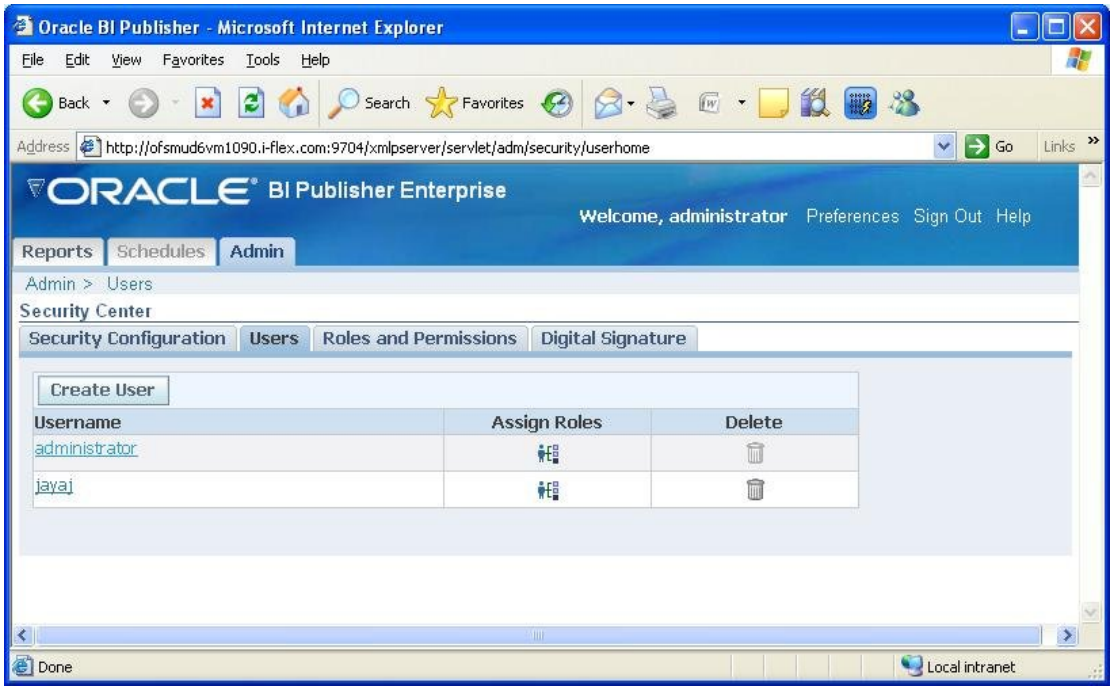


**Figure 22 : Users Page**

4. Click Create User to create a new user. The Create User page appears.

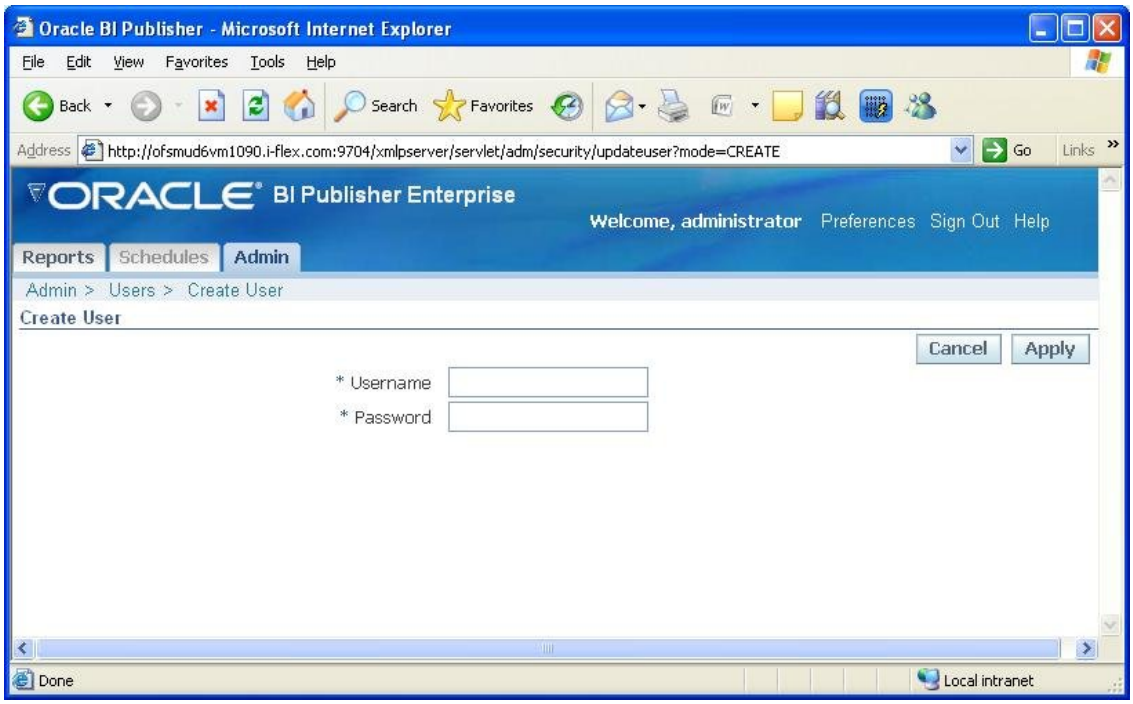


**Figure 23 : Create User Page**

5. Enter the user name and password as RPTUSER.
6. Click Apply. The user is added to the Users list.

 

# Assigning a Role to a User

To assign a role to a user:

1. Login to the BI Publisher Server as Administrator.
2. Click the Admin tab. The Admin page appears.
3. Under the Security Center section, click the Users link. The Users page appears with a list of existing users.
4. Click the Assign Roles icon corresponding to the user to which you want to assign the role. The Assign Roles page appears.

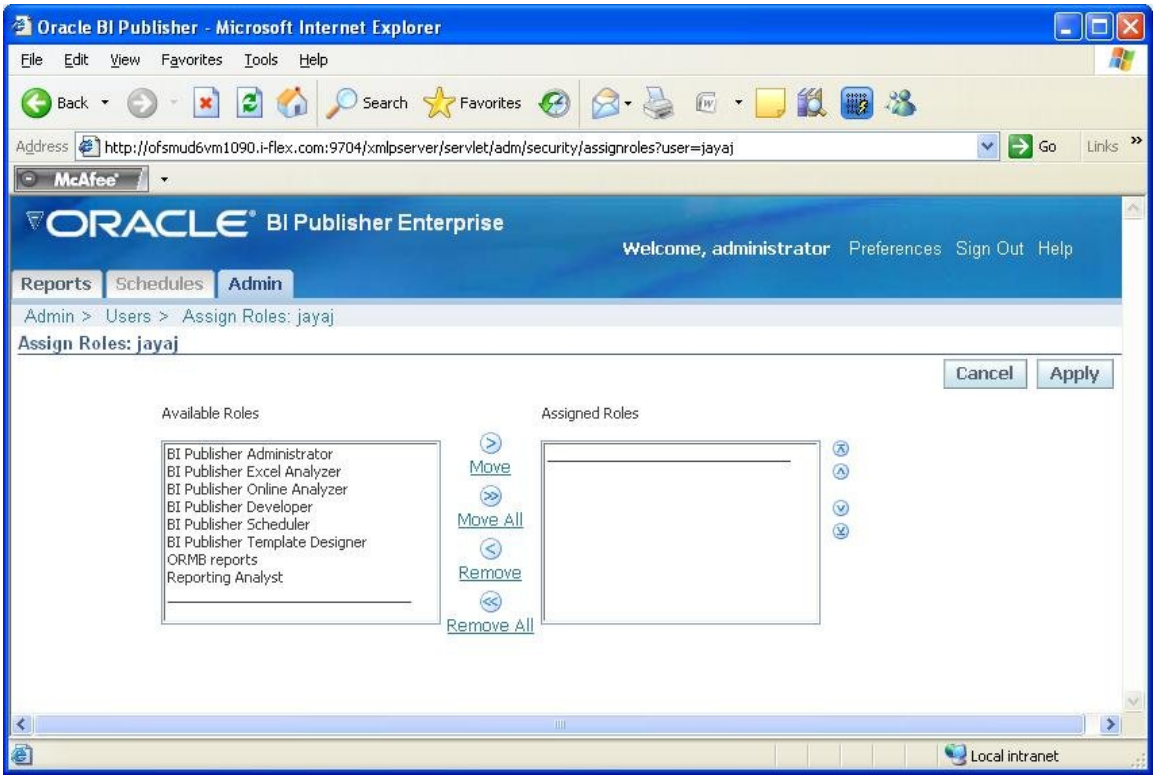


**Figure 24 : Assign Roles Page**

5. Select the role in the Available Roles list and click the Move (>) button. The selected role is moved to the Assigned Roles list.
6. Click Apply. The Users page appears.

# Verifying the BI Publisher Server Configuration

To verify the BI Publisher Server configuration:

1. Login to the BI Publisher Server as RTPUSER.
2. In the Reports tab, verify whether the 10 sample reports are available in the `Shared Folders\ORMB` folder.

 

# Copying Report Definition from the Demonstration Database

To use the 10 sample reports from within ORMB, you need to get the report definition and related data for each sample report from the demonstration database. This section explains how to copy report definition for all sample reports from the demonstration database to the implementation or target database.

To copy the report definition from the demonstration database, you need to:

1. Execute the CL-COPDB DB process
2. Execute the CL-APPCH batch
3. Execute the CI_COPRP DB process
4. Execute the CL-APPCH batch

Warning: If you are not familiar with the ConfigLab concepts, this section will be difficult for you to understand. You need to understand how a Compare database process is used to copy objects between two databases. Familiarize yourself with this concept before attempting to copy a report from the demonstration database.

## Executing the CL-COPDB DB Process

You need a DB process setup in the target database that helps you to copy reports from the demonstration database to the target database. This DB process must have the following instructions:

- A primary instruction for the Report maintenance object (MO)
- A child instruction for each MO referenced as a foreign key on the Report MO (i.e., validation algorithm, characteristics used for parameters and any algorithms used by the characteristics)

The demonstration database contains a DB process called CI_COPRP that performs these steps. In order to copy reports from the demonstration database, you must first copy this DB process from the demonstration database to the target database.

Note: Copying the CI_COPRP DB process is a one-time activity. Once you copy this DB process in the target database, you can use it repeatedly to copy reports from the demonstration database.

To copy the CI_COPRP DB process:

1. Login to ORMB.
2. Select Admin Menu → D → DB Process. The DB Process Search screen appears.
3. Enter CL-COPDB in the DB Process field and click the Search button corresponding to this field. The DB Process screen appears.

 

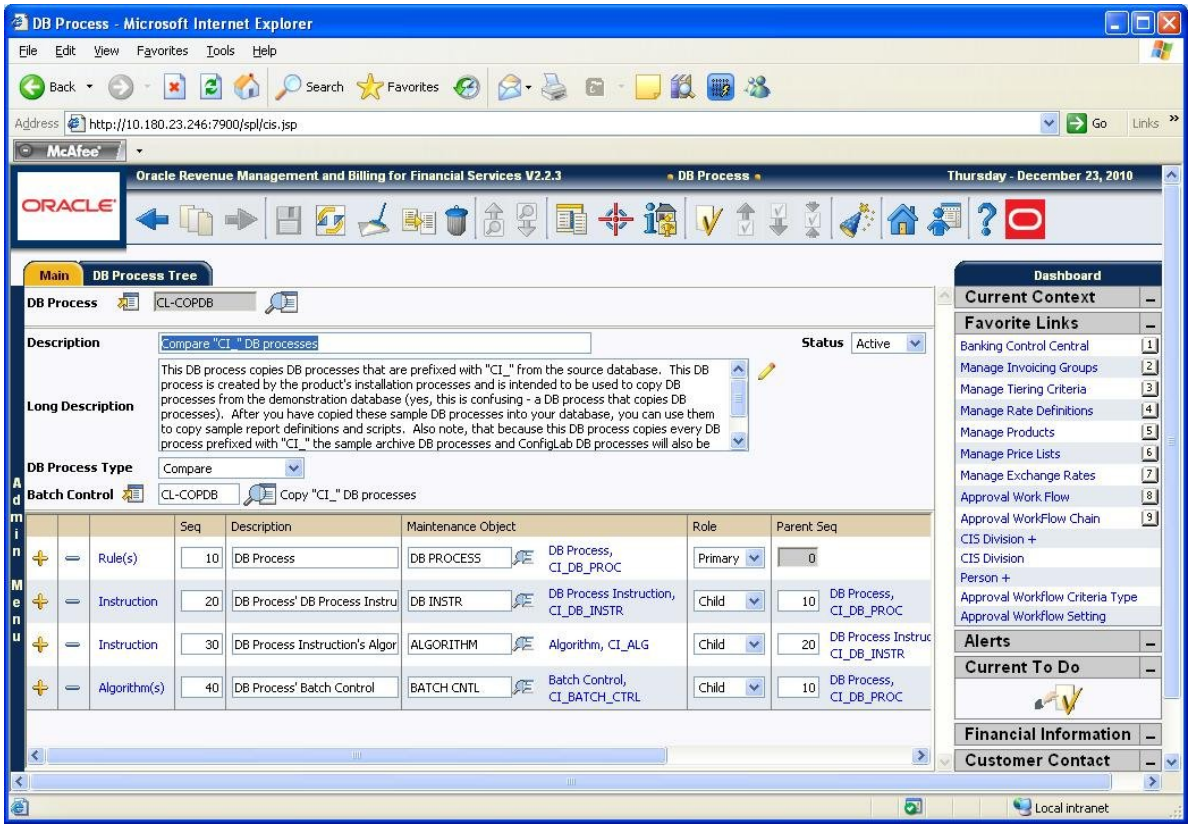


**Figure 25 : DB Process Screen**

4. Click the Rule(s) link corresponding to the primary instruction of the CL-COPDB DB process. The DB Process Instruction screen appears.

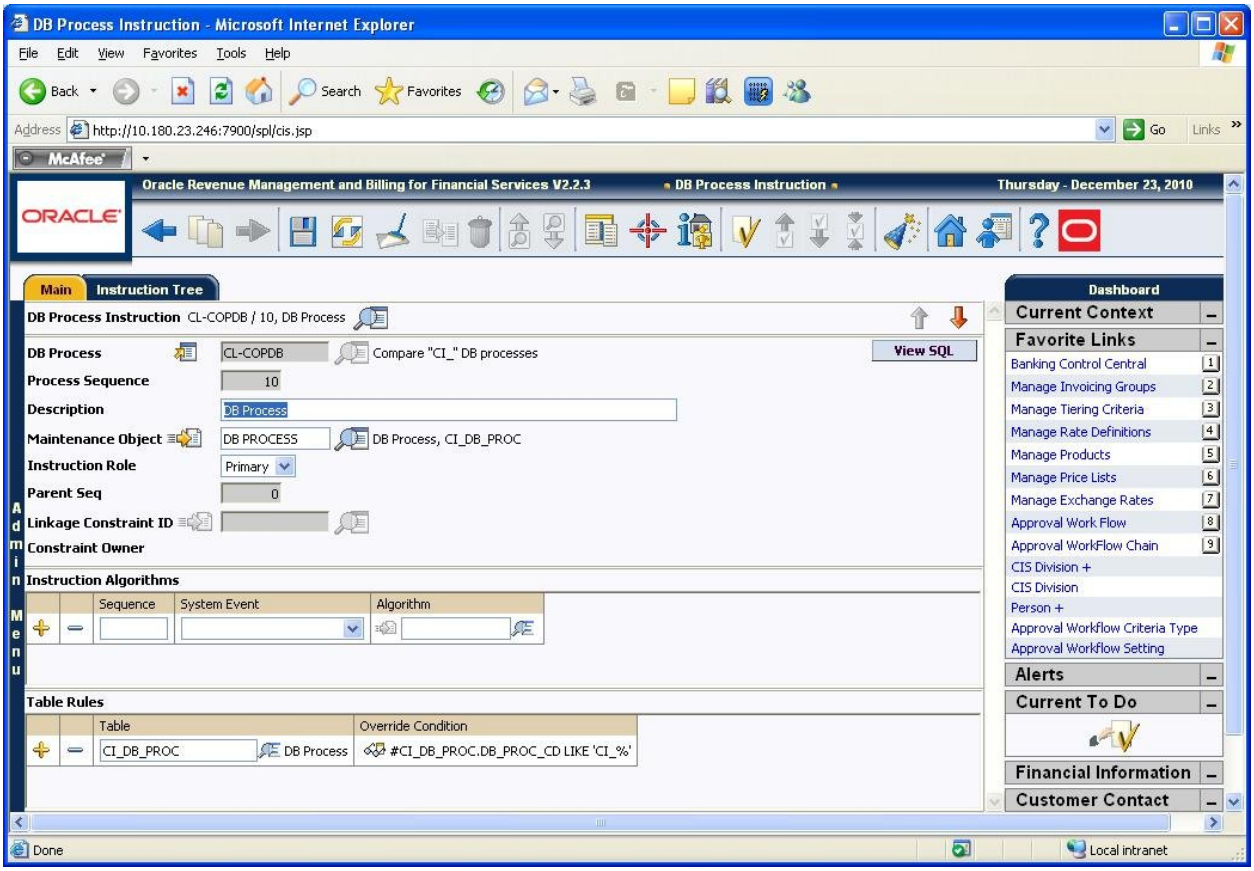


**Figure 26 : DB Process Instruction Screen**

5. Click the View/Edit icon ( ) in the Override Condition column of the Table Rules table. The Override Condition dialog box appears.

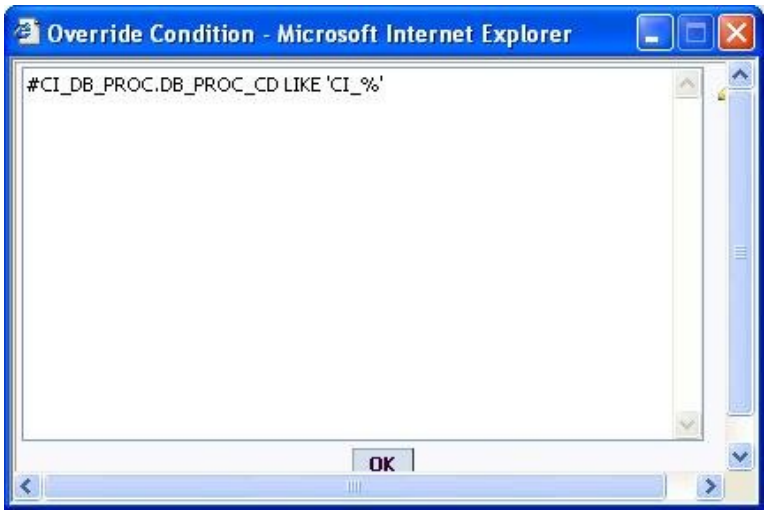


**Figure 27 : Override Condition Dialog Box**

 

Note: By default, the CL-COPDB DB process allows you to copy all DB processes prefixed with CI_ from the demonstration database to the target database. If you only want to copy the CI_COPRP DB process, you will have to modify this override condition.

6. Change the condition to the following:

   `#CI_DB_PROC.DB_PROC_CD='CI_COPRP'`

7. Click OK.
8. Click Save on the toolbar.
9. Click Go Back on the toolbar. The DB Process screen appears
10. Click the Show Context Menu icon ( ) corresponding to the DB Process field. A menu appears.
11. Click the Go to Batch Submission + menu option. The Batch Job Submission screen appears.

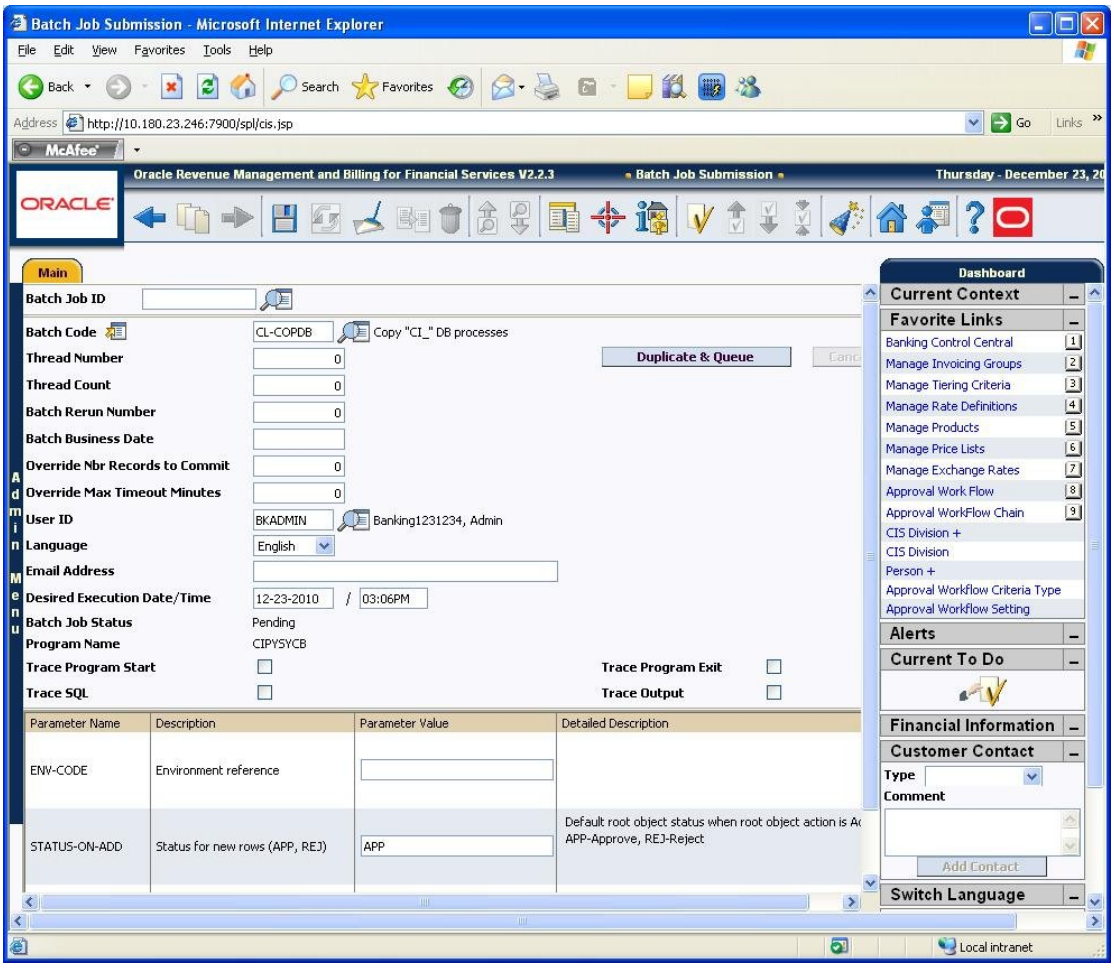


**Figure 28 : Batch Job Submission Screen**

12. Enter the environment reference that points to the demonstration database.

Note: If you don't have an environment reference setup in the target database that references the demonstration database, contact your technical staff to execute a registration script that sets up this environment reference. For more details about this installation script, refer to Registering ConfigLab Environments.

13. Click Save on the toolbar. Once the batch is executed, the status of the batch changes to Ended.
14. Click the Show Context Menu icon ( ) corresponding to the Batch Code field. A menu appears.
15. Click the Go to Difference Query + menu option. The Difference Query screen appears.

Note: The Difference Query screen indicates the difference between the demonstration and the target database based on the specified override condition. When you execute the process for the first time, it creates a root object in the target database to indicate that the CI_COPRP DB process will be added to the target database.

16. Select the difference query and click Approve.

# Executing the CL-APPCH Batch

Once you approve the root objects, you need to execute the CL-APPCH batch to change the target database. To execute the CL-APPCH batch:

1. Login to ORMB.
2. Select Main Menu → Batch → Batch Job Submission. The Batch Job Submission screen appears.
3. Enter CL-APPCH in the Batch Code field and press Enter.

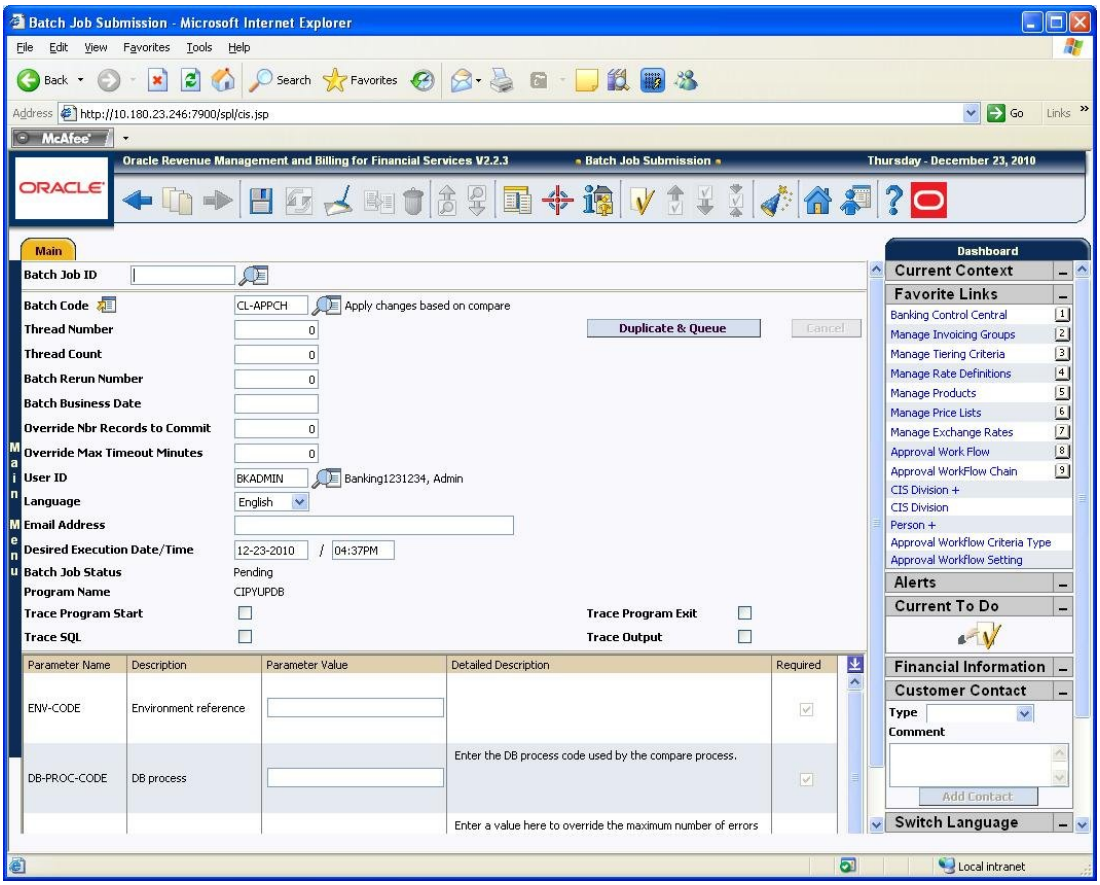


**Figure 29 : Batch Job Submission Screen**

4. Enter the environment reference that points to the demonstration database.

 

Note: If you don't have an environment reference setup in the target database that references the demonstration database, contact your technical staff to execute a registration script that sets up this environment reference. For more details about this installation script, refer to Registering ConfigLab Environments.

5. Enter the DB process as CL-COPDB.
6. Click Save on the toolbar. Once the batch is executed, the CI_COPRP DB process is copied from the demonstration database to the target database.

# Executing the CI_COPRP DB Process

Once you have copied the CI_COPRP DB process, you need to execute the CI_COPRP DB process to copy reports from the demonstration database to the target database.

To execute the CI_COPRP DB process:

1. Login to ORMB.
2. Select Admin Menu → D → DB Process. The DB Process Search screen appears.
3. Enter CI_COPRP in the DB Process field and click the Search button corresponding to this field. The DB Process screen appears.
4. Click the Rule(s) link corresponding to the primary instruction of the CI_COPRP DB process. The DB Process Instruction screen appears.
5. Click the View/Edit icon ( ) in the Override Condition column of the Table Rules table. The Override Condition dialog box appears.

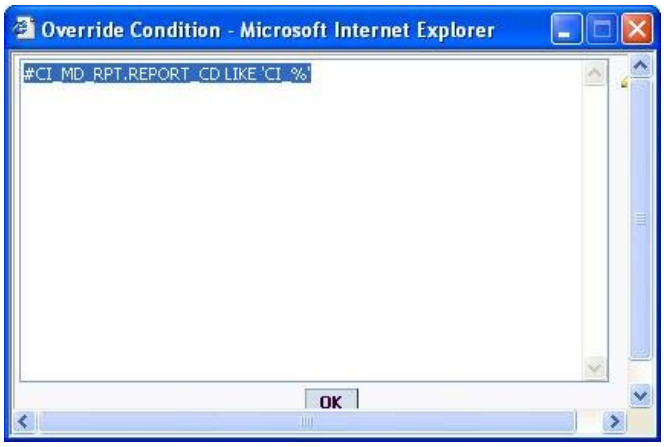


**Figure 30 : Override Condition Dialog Box**

Note: By default, the CI_COPRP DB process allows you to copy all reports prefixed with CI_ from the demonstration database to the target database. If you only want to copy one report (for example, CI_PMTBAL), then you need to change this override condition to #CI_MD_RPT.REPORT_CD='CI_PMTBAL'.

6. Click OK.
7. Click Save on the toolbar.
8. Click Go Back on the toolbar. The DB Process screen appears
9. Click the Show Context Menu icon ( ) corresponding to the DB Process field. A menu appears.
10. Click the Go to Batch Submission + menu option. The Batch Job Submission screen appears.

 

11. Enter the environment reference that points to the demonstration database.

Note: If you don't have an environment reference setup in the target database that references the demonstration database, contact your technical staff to execute a registration script that sets up this environment reference. For more details about this installation script, refer to Registering ConfigLab Environments.

12. Click Save on the toolbar. Once the batch is executed, the status of the batch changes to Ended.
13. Click the Show Context Menu icon ( ) corresponding to the Batch Code field. A menu appears.
14. Click the Go to Difference Query + menu option. The Difference Query screen appears.

Note: The Difference Query screen indicates the difference between the reports in the demonstration and the target database based on the specified override condition. When you execute the process, it creates a root object in the target database for every report that is not the same in two databases.

15. Select the difference query and click Approve.

## Executing the CL-APPCH Batch

Once you approve the root objects, you need to execute the CL-APPCH batch to change the target database. To execute the CL-APPCH batch:

1. Login to ORMB.
2. Select Main Menu → Batch → Batch Job Submission. The Batch Job Submission screen appears.
3. Enter CL-APPCH in the Batch Code field and press Enter.
4. Enter the environment reference that points to the demonstration database.

Note: If you don't have an environment reference setup in the target database that references the demonstration database, contact your technical staff to execute a registration script that sets up this environment reference. For more details about this installation script, refer to Registering ConfigLab Environments.

5. Enter the DB process as CI_COPRP.
6. Click Save on the toolbar. Once the batch is executed, the reports are copied from the demonstration database to the target database.

# Defining a Company Title

When you generate a report, the company title appears at the top of the report. To define a company title:

1. Login to ORMB.
2. Select Admin Menu → I → Installation Options – Framework. The Installation Options – Framework screen appears.
3. Click the Messages tab. The Messages tab appears.
4. Click the Add icon ( ) to add a new message.
5. Select Company Title for Reports from the Installation Message Type list.
6. Enter your company name in the Installation Message Text field.

 

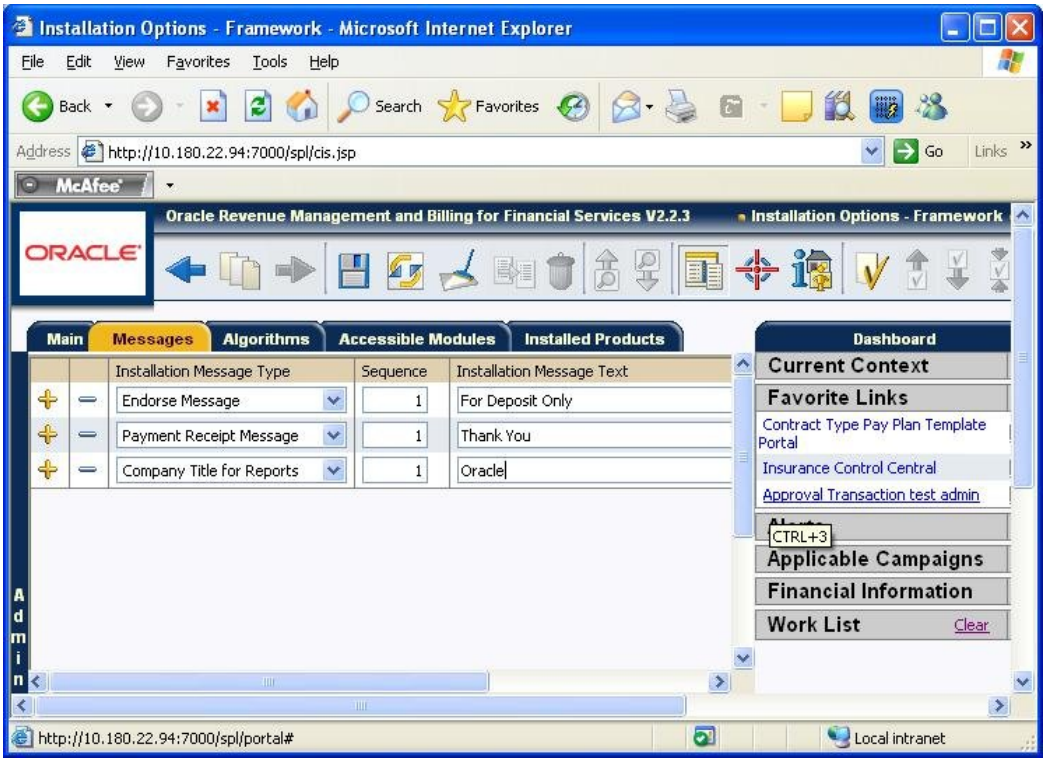


**Figure 31 : Installation Options – Framework Screen**

7. Click Save. Now, when you generate a report, this company title will appear at the top of the report.

> Note:
>
> For more information on how to generate a report, refer to *ORMB Banking User Guide*.
>
> There is a function called CIZCOMPFN in the reports which receives the user ID as a parameter. The purpose of this function is to retrieve the company's title in the user's language from the appropriate installation message record.

# Defining a Company Address

To define a company address for letters:

1. Login to ORMB.
2. Select Admin Menu → I → Installation Options – Framework. The Installation Options – Framework screen appears.
3. Click the Messages tab. The Messages tab appears.
4. Click the Add icon (+) to add a new message.
5. Select Company Address for letters from the Installation Message Type list.
6. Enter your company address in the Installation Message Text field.

 

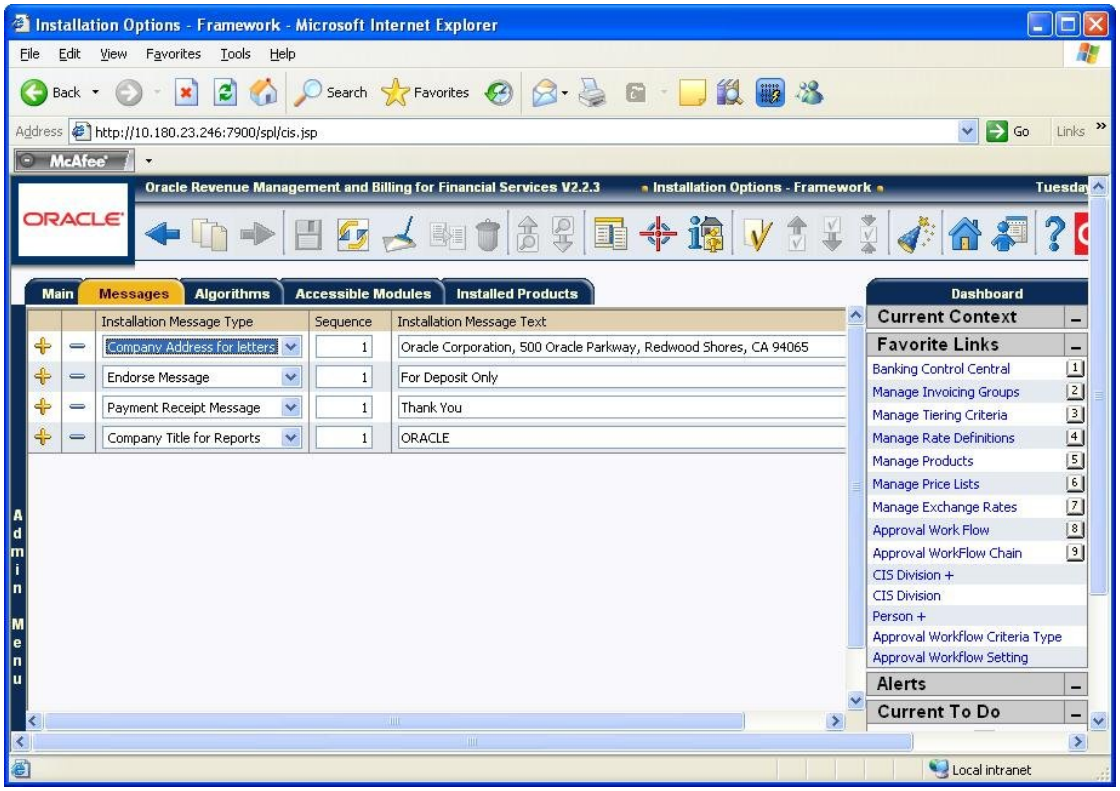


**Figure 32 : Installation Options – Framework Screen**

7. Click Save.

# Defining a Company Logo

When you generate a report, company's logo appears in the upper-left corner of the report. To define a company logo:

1. Save the company logo in a file named company_logo.gif.
2. Copy the company_logo.gif file at the following location on the server where Oracle BI Publisher Enterprise is installed:

   `..\oc4j_bi\j2ee\home\default-web-app\logo`

# Granting Access to Reports and Reporting Screens in ORMB

A user can generate a report from within ORMB only when the user has access to that report. To grant access to the user, you must assign the user to a user group which has access to the application service of the respective report.

To grant access to all reports:

1. Login to ORMB.
2. Select Admin Menu → U → User Group. The User Group Search screen appears.
3. Enter ALL_SERVICES in the User Group field and click the Search button corresponding to this field. The User Group screen appears.

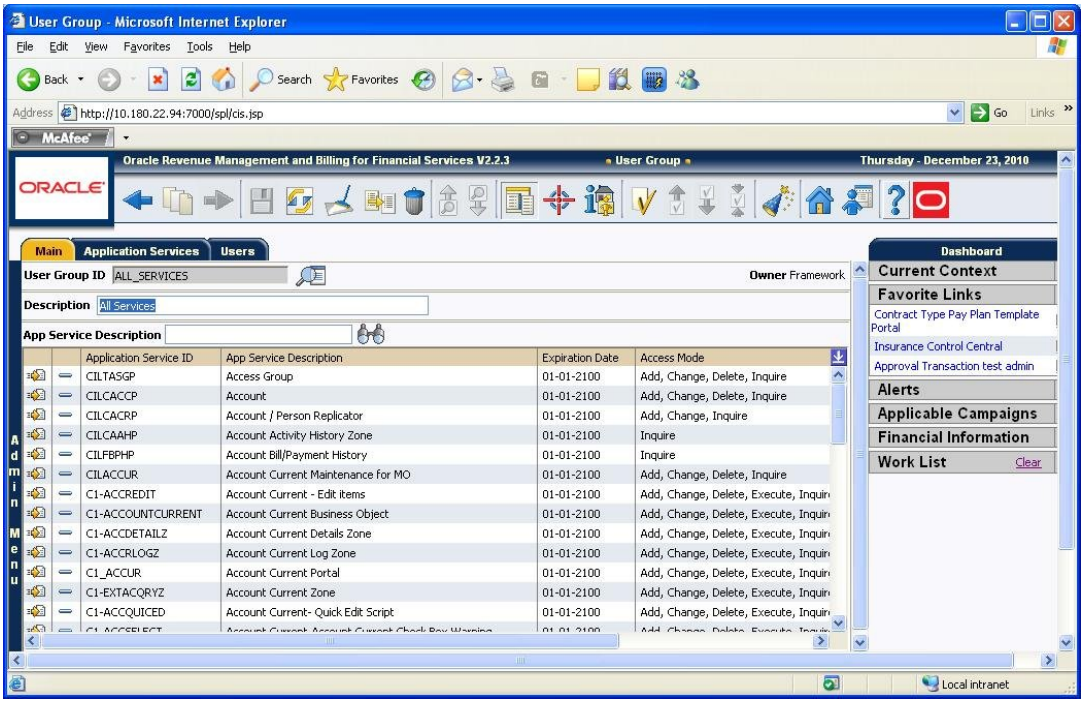


**Figure 33 : User Group Screen**

Note: A list of application services to which the user group has access appears in the Main tab. You can add additional application services from the Application Services tab.

4. Click the Users tab. The Users tab appears.

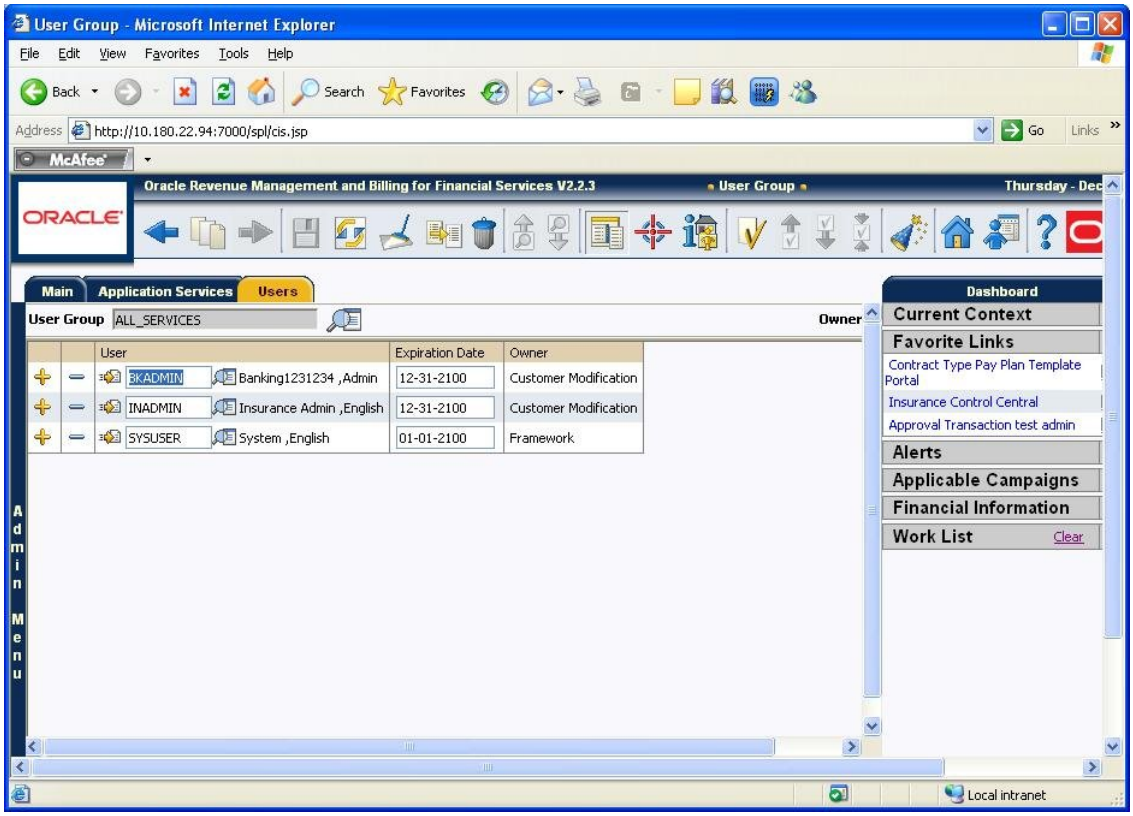


**Figure 34 : User Group - Users Tab**

5. Click the Add icon (+) to add a new user to a user group.
6. Enter the user name in the User field.
7. Enter the date when the group's access to the application service expires in the Expiration Date field.
8. Click Save on the toolbar. The user will now have access to the reports and the reporting screens.

# Chapter 2: Defining a New Report

You can change the attributes of these sample reports or can define new reports from scratch in ORMB based on the business requirements. To define a new report in ORMB:

1. Login to ORMB.
2. Select Admin Menu → R → Report Definition +. The Report Definition screen appears.

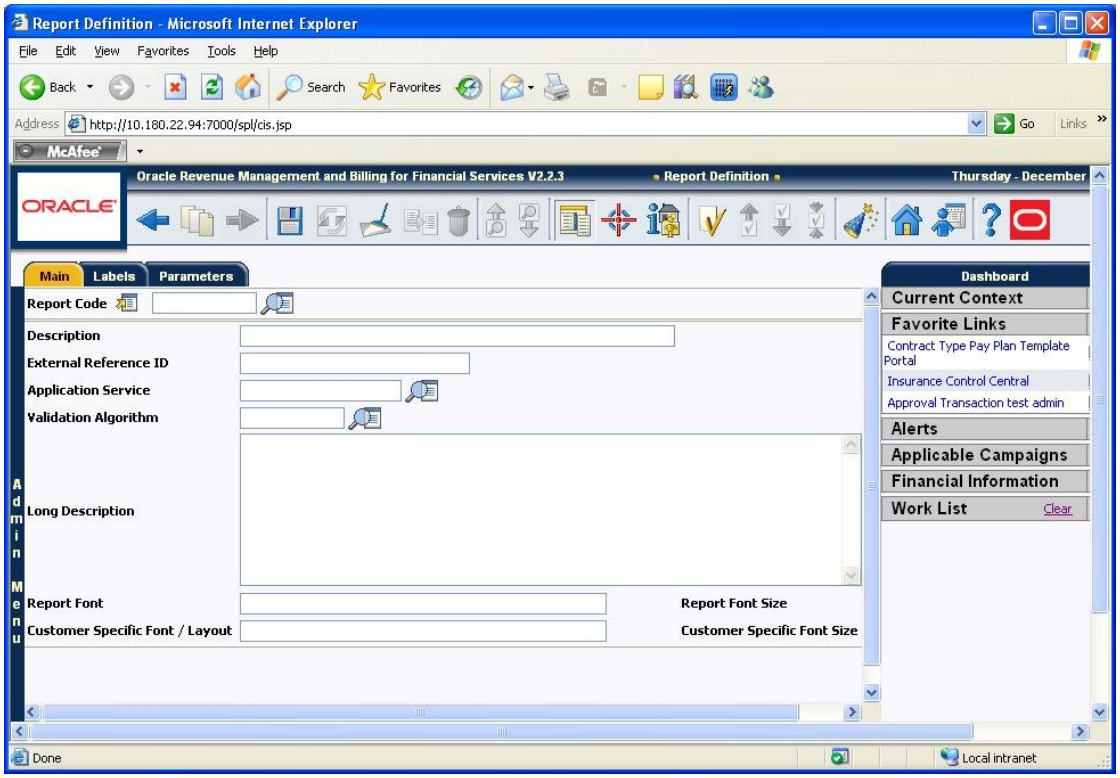


**Figure 35 : Report Definition – Main Tab**

The Report Definition screen contains the following tabs:

- Main – Allows you to specify the basic details of the report.
- Labels – Allows you to specify the labels that you want to use in the report.

Note: The report definition and the report layout must contain the same labels that you want to use in the report.

- Parameters – Allows you to define parameters for the report.

The Main tab contains the following fields:

| Field | Description |
|---|---|
| Report Code | Used to specify the code that uniquely identifies the report.<br>Note: It is recommended to prefix the report code with CM. If you do not do this, there is a slight possibility that a future release of the application could introduce a new report with the same name. |
| Description | Used to specify the description for the report. |
| External Reference ID | Used to specify the identifier for this report in the external reporting tool. |
| Application Service | Used to specify the application service for the report.<br>Note: The application service enables users to generate the report from within ORMB. Once you define an application service for each report, you can use application security to define which users may access this report. |
| Validation Algorithm | Used to specify the validation algorithm for the report.<br>Note: If you want some field level validations to be defined for the report, create a validation algorithm and attach it in this field. |
| Long Description | Used to describe the functionality of the report. This description is displayed in the Report Submission screen. |
| Report Font | Used to specify the font face that you want to use for the report.<br>Note: This field is not effective. Currently, the details are specified in the .rtf file of each report. |
| Report Font Size | Used to specify the font size that you want to use for the report.<br>Note: This field is not effective. Currently, the details are specified in the .rtf file of each report. |
| Customer Specific Font/Layout | Used to specify the font face that you want to use as per the business requirements.<br>Note: This field is not effective. |
| Customer Specific Font Size | Used to specify the font size that you want to use as per the business requirements.<br>Note: This field is not effective. |

Note: There is a function called CIZINSTFN in the reports which receives the user ID and report code as parameters. The purpose of this function is to retrieve the following: Font and font size from the report definition; Date, time and number format from the user's display profile; Currency from the installation record; Currency symbol and position from the currency record

3. Enter the details of the report in the Main tab.

4. Click the Labels tab. The Labels tab appears.

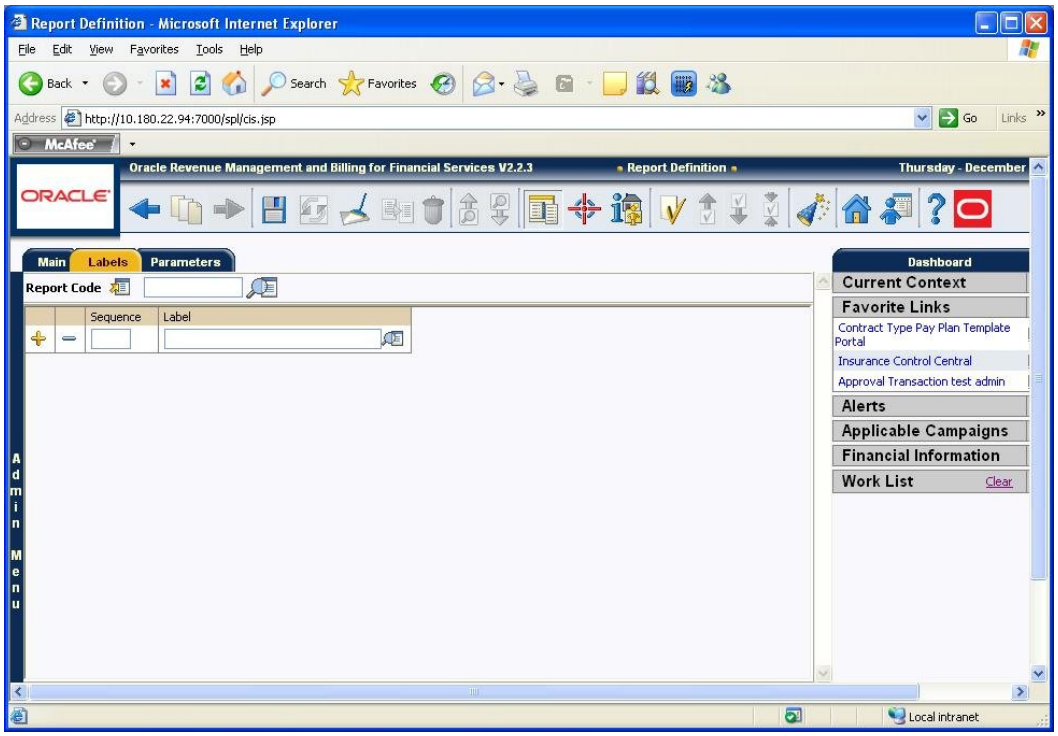


**Figure 36 : Report Definition – Labels Tab**

The Labels tab contains the following fields:

| Field | Description |
|---|---|
| Sequence | Used to specify the sequence in which the labels will be displayed in the report. |
| Label | Used to specify the name of the field. |

Note: There is a function called CIZLBALLFN in the reports which receives the user ID and report code as parameters. The purpose of this function is to retrieve all the labels defined in the report definition.

5. Enter the sequence number and select the field using the Search for Field icon ( ) in the Label field.

Note: You can add or delete labels from the report by clicking the Add icon ( ) or the Delete icon ( ), respectively.

6. Click the Parameters tab. The Parameters tab appears.

 

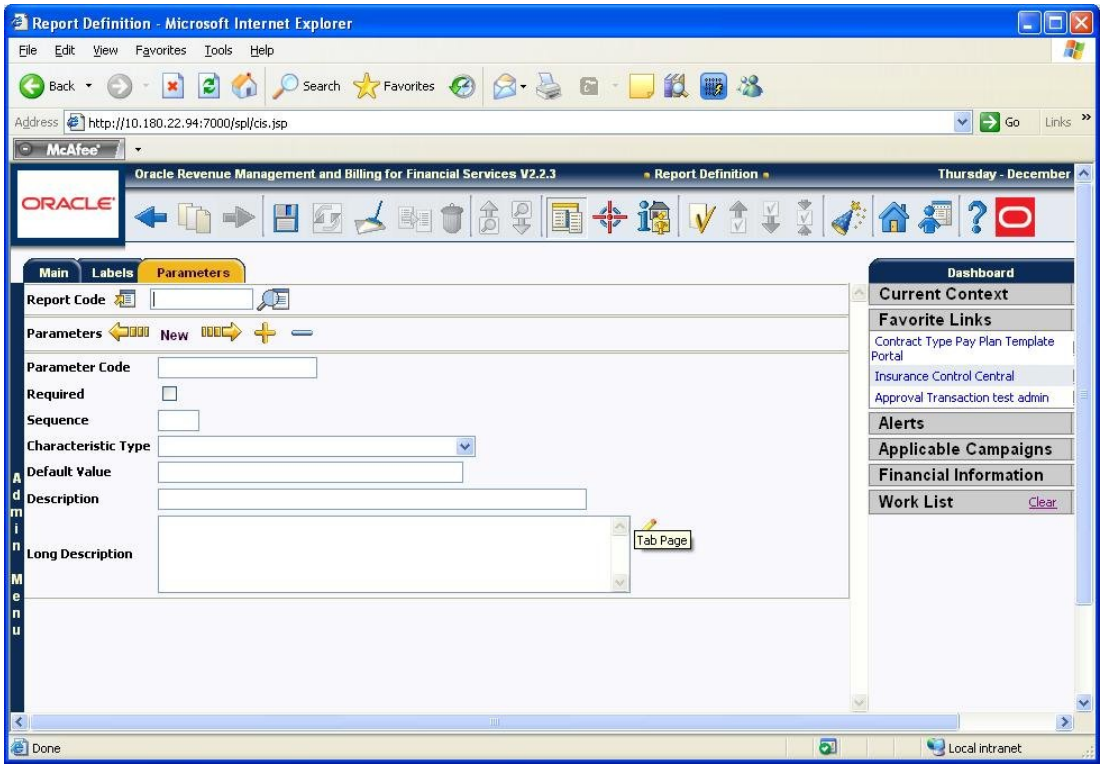


**Figure 37 : Report Definition – Parameters Tab**

The Parameters tab contains the following fields:

| Field | Description |
|---|---|
| Parameter Code | Used to specify the code that uniquely identifies the parameter. |
| Required | Used to indicate whether the parameter is mandatory or not. |
| Sequence | Used to indicate the order in which the parameter should appear in the Report Submission screen. It must be the same as the sequence defined in the reporting tool. |
| Characteristic Type | Used to specify the characteristic type of the parameter. |
| Default Value | Used to specify the default value for this parameter. |
| Description | Used to specify the description of the parameter. |
| Long Description | Used to describe the functionality of the parameter. You can view this description by clicking the View Long Description icon ( ) corresponding to the parameter in the Report Submission screen. |

7. Enter the details of the parameter.

Note: You can add or delete parameters from the report by clicking the Add icon ( ) or the Delete icon ( ), respectively.

8. Click Save on the toolbar.

 

# Chapter 3: Using Sample Report as a Starting Point

To use sample report as a starting point for creating a new report, you need to do the following in BI Publisher:

- Create a copy of the report and save it in the appropriate directory. Prefix the new report name with CM.
- Review the stored procedure(s) used for this report. If you want to change the data that is being accessed, copy the stored procedure and prefix it with CM. Make the appropriate changes in the new stored procedure.

Performance Consideration: When designing a stored procedure, you must consider the performance of the report when executed. Contact your database administrator for any support.

Defining Messages: The stored procedures provided with the system use messages defined in the message category 30. If the new stored procedures require new messages, use message category 90000 or greater which are reserved for implementation.

- Review the parameters used in the report. Make the appropriate changes to the parameters required by the report. This affects how you define your report.
- Determine whether you require field level validation to be defined for the report parameters. If yes, then create an appropriate validation algorithm.
- Review the labels used in the report. Make the appropriate changes to the labels required by the report. This affects how you define your report.
- Review the layout of the report and make any desired changes based on the business needs.

Once you create a report in BI Publisher, you need to do the following:

1. Publish the report in BI Publisher. For more details, refer to the Publishing Sample Reports in Oracle BI Publisher Enterprise section.
2. Define access rights for the reports in BI Publisher. For more details, refer to the Granting Access to the Existing Folders section.
3. Define the report in ORMB. For more details, refer to the Defining a New Report chapter.
4. Define access rights for the reports in ORMB. For more details, refer to the Granting Access to Reports and Reporting Screens in ORMB section.

 