Oracle® Revenue Management and Billing

Version 2.3.0.2.0

Reports Installation Guide

Revision 4.1

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ORACLE®

Oracle Revenue Management and Billing Reports Installation Guide

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Preface

About This Document

Oracle Revenue Management and Billing (ORMB) may optionally be configured to use the reporting feature. You can generate reports from ORMB only if Oracle 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. This document helps you to understand how to install reports in Oracle 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

This document is intended for the following audience:

- End-Users
- Implementation Team
- Consulting Team
- Development Team

Organization of the Document

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

Section No.	Section Name	Description
Section 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.
Section 2	Defining a New Report	Explains how to define a new report from scratch in ORMB.
Section 3	Using Sample Report as a Starting Point	Explains how to define a new report using an existing report.
Appendix A	ORMB V2.3.0.2.0 Patch Numbers	Lists the ORMB V2.3.0.2.0 domain and platform-specific patch numbers along with its contents.

Related Documents

You can refer to the following documents for more information:

Document	Description
Oracle Revenue Management and Billing Banking User Guide	Lists and describes various banking features in Oracle Revenue Management and Billing. It also describes all screens related to these features and explains how to perform various tasks in the application.
Oracle Revenue Management and Billing Insurance User Guide	Lists and describes various insurance features in Oracle Revenue Management and Billing. It also describes all screens related to these features and explains how to perform various tasks in the application.
Oracle Revenue Management and Billing Version 2.3.0.2.0 Release Notes	Provides a brief description about the new features and enhancements made in this release. It also highlights the bug fixes and known issues in this release.

Change Log

Revision	Last Update	Updated Section
4.1	16-Dec-2014	Appendix A : ORMB V2.3.0.2.0 Patch Numbers

Contents

1. Installing Reports

This section lists and describes the following activities that you need to complete in the specified order to use the reporting feature in ORMB:

1. Installing Oracle BI Publisher Standalone
2. Downloading Sample Reports Package
3. Creating the RPTUSER User
4. Creating Oracle Functions and Packages
5. Compiling Invalid Objects
6. Configuring Security
7. Configuring ORMB to Invoke Oracle BI Publisher
8. Configuring the Oracle BI Publisher Server
9. Publishing Sample Reports in Oracle BI Publisher
10. Defining a Company Title
11. Defining a Company Address
12. Defining a Company Logo
13. Copying Sample Reports Definition in ORMB
14. Generating Sample Reports

1.1 Installing Oracle BI Publisher Standalone

You must install Oracle BI Publisher Standalone 11g Release 1 (11.1.1.7) on Windows, AIX and Linux platforms. You can download Oracle BI Publisher Standalone 11g Release 1 (11.1.1.7) for these platforms from Oracle Software Delivery Cloud.

Note:

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
```

1.2 Downloading Sample Reports Package

To download and decompress the sample reports package:

1. Download the RMB V2.3.0.2.0 - <Domain> - <Platform> patch from My Oracle Support. A zip file is downloaded. For more information about the patch numbers, refer to Appendix A: ORMB V2.3.0.2.0 Patch Numbers.
2. Unzip the downloaded file in your local folder. The contents of the zip file are extracted. For more information about the contents of the RMB V2.3.0.2.0 - <Domain> - <Platform> patch, refer to Appendix A: ORMB V2.3.0.2.0 Patch Numbers.
3. Create a temporary folder named `TEMPDIR` on your local machine.

4. Unzip the `RMB-V2.3.0.2.0-Reports.zip` file in the `TEMPDIR` folder. The contents of the zip file are extracted in the `TEMPDIR` folder. The contents include the `ORMB_Reports` folder.

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

1.3 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 in the database:

1. Browse to the `..\TEMPDIR\ORMB_`Reports\BI-Publisher\functions\oracle location.
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. Connect to the ORMB database using any SQL client (such as Oracle SQL Developer or PL/SQL Developer) and the `cisadm` credentials.
6. Execute the `CDX_rptuser.sql` query using the following command:

```
..\TEMPDIR\ORMB_Reports\BI-
Publisher\functions\oracle\CDX_rptuser.sql;
```

1.4 Creating Oracle Functions and Packages

You need to create Oracle functions and packages for these sample reports in the target database. To create the Oracle functions and packages:

1. Connect to the ORMB database using any SQL client (such as Oracle SQL Developer or PL/SQL Developer) and the `cisadm` credentials.
2. Execute the `CDX_rptfn.sql` query using the following command:

```
..\TEMPDIR\ORMB_Reports\BI-
Publisher\functions\oracle\CDX_rptfn.sql;
```

1.5 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. Connect to the ORMB database using any SQL client (such as Oracle SQL Developer or PL/SQL Developer) and the `cisadm` credentials.
2. Execute the `CDX_rptfn.sql` query using the following command:


```
..\TEMPDIR\ORMB_Reports\BI-
Publisher\functions\oracle\CDX_compfn.sql;
```

1.6 Configuring Security

Once you create the user, functions, and packages in the database, you need to execute a utility program named `OraGenSec`. This utility program helps you to generate security for all or specific objects in the database.

To define the security configuration:

1. Browse to the location where the Oracle Revenue Management and Billing V2.3.0.2.0 Oracle Database package is extracted.
2. Execute the `OraGenSec` utility from the `..\RMB\Upgrade\Oracle\Install-Upgrade` folder using the following command:

   ```
   OraGenSec.exe
   ```

   This utility prompts you to enter values for the following parameters:

Parameter	Value
Name of the owner of the database schema	`<DB_USER>` Example: `CISADM`
Password for the user (in silent mode)	`<DB_USER_PASSWORD>`
Name of the Oracle database	`<DB_NAME>`
Comma-separated list of Oracle users in which synonyms need to be created	`<DB_USER>` Example: `RPTUSER`

3. Enter the required parameter values.

   The following message appears in the command line:

   ```
   Select the following options:
   (A/a): Generate security for all objects in the Database?
   (O/o): Generate security for specific Objects inputted in this
   terminal?
   (F/f): Generate security for specific objects generated from an
   input File?
   ```

4. Enter **A** to generate security for all objects in the database, and then press **Enter**.

   A message appears indicating that the database connection is established and security is defined for all objects in the database.

1.7 Configuring ORMB to Invoke Oracle BI Publisher

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

1. Set the Installation Options
2. Set the Reporting Options
3. Define an Algorithm to Validate the Date Format
4. Define the System Default Access Group
5. Assign the System Default Access Group to a User
6. Grant Access to the CILZRPTP Application Service
7. Grant Access to Sample Report's Application Service

1.7.1 Setting up Installation Options

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

To set up the installation options:

1. Login to Oracle Revenue Management and Billing using the SYSUSER credentials.
2. Create an algorithm using the **F1-BIPR-INV** algorithm type. To create the algorithm:
   a. Click the **Menu** link in the **Actions/Navigation** area. A list appears.
   b. Select the **Admin Menu** option from the list.
   c. From the **Admin Menu**, select **A** and then click **Algorithm**. The **Algorithm** screen appears.
   d. Enter values in the following fields:

Field Name	Description	Value
Algorithm Code	Used to specify the name of the algorithm.	F1-BIPR-INV
Description	Used to specify the description for the algorithm.	Reporting Tool Algorithm
Algorithm Type	Used to indicate the algorithm type using which you want to create an algorithm.	F1-BIPR-INV
Effective Date	Used to indicate the date from when the parameter values are effective. **Note:** You can define different set of parameter values for a different date range.	01-01-1950

   e. Click **Save**.
3. Attach this algorithm on the **Reporting Tool** algorithm spot in the **Installation Options – Framework** screen. To do this:

a. From the **Admin Menu**, select **I** and then click **Installation Options - Framework**. The **Installation Options - Framework** screen appears.
b. Click the **Algorithms** tab.
c. Click the **Plus** ( ) icon to attach an algorithm.
d. Select the **Reporting Tool** option from the **System Event** list.
e. Enter **1** in the **Sequence Number** field.
f. Enter **F1-BIPR-INV** in the **Algorithm** field and press **Enter**. The algorithm description appears corresponding to the **Algorithm** field.

Note: This reporting tool installation algorithm creates a URL which is used by the system to invoke Oracle BI Publisher.

1.7.2 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 Oracle Revenue Management and Billing using the SYSUSER credentials.
2. Click the **Menu** link in the **Actions/Navigation** area. A list appears.
3. Select the **Admin Menu** option from the list.
4. From the **Admin Menu**, select **R** and then click **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 for the reporting option.

5. Set the following reporting options:

Reporting Option	Description	Value
Reporting Folder	Used to specify the name of the Oracle BI Publisher Shared folder created for storing reports.	ORMB
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: http://<Oracle_BI_Publisher_Server_IP>:<Port_Number>
Suppress User Credentials (Y/N)	Used to indicate whether user credentials must be suppressed while generating a report.	Y

6. 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.

1.7.3 Defining an Algorithm to Validate the Date Format

The date format specified while generating reports from ORMB must be validated. The date format must be in the YYYY-MM-DD format. You need to define an algorithm using the ADHV-DTD algorithm type which will validate the date format.

To define an algorithm to validate the date format:

1. Login to Oracle Revenue Management and Billing using the SYSUSER credentials.
2. Click the **Menu** link in the **Actions/Navigation** area. A list appears.
3. Select the **Admin Menu** option from the list.
4. From the **Admin Menu**, select **A** and then click **Algorithm**. The **Algorithm** screen appears.
5. Enter values in the following fields:

Field Name	Description	Value
Algorithm Code	Used to specify the name of the algorithm.	CI_DTD_YMD
Description	Used to specify the description for the algorithm.	Validate Date Format
Algorithm Type	Used to indicate the algorithm type using which you want to create an algorithm.	ADHV-DTD
Effective Date	Used to indicate the date from when the parameter values are effective. **Note:** You can define different set of parameter values for a different date range.	01-01-1950

6. Set the value of the **Date Format1 (Stored Format)** parameter to **YYYY-MM-DD**.
7. Click **Save**.

1.7.4 Defining the System Default Access Group

The demo database already has the System Default (***) access group. But, if you are using a blank database, you need to define an access group named System Default.

To define the access group:

1. Login to Oracle Revenue Management and Billing using the SYSUSER credentials.
2. Click the **Menu** link in the **Actions/Navigation** area. A list appears.
3. Select the **Admin Menu** option from the list.
4. From the **Admin Menu**, select **A** and then click **Access Group**. The **Access Group** screen appears.
5. Enter values in the following fields:

Field Name	Description	Value
Access Group	Used to specify the access group.	***
Description	Used to specify description for the access group.	System Default

6. Enter ******* in the **Data Access Role** field to assign the data access role named System Default to the access group.
7. Press **Enter**. The data access role description appears corresponding to the **Data Access Role** field.

1.7.5 Assigning the System Default Access Group to a User

A user can generate reports from ORMB only when the user is assigned to the System Default access group. To assign the System Default access group to a user:

1. Login to Oracle Revenue Management and Billing using the SYSUSER credentials.
2. Click the **Menu** link in the **Actions/Navigation** area. A list appears.
3. Select the **Admin Menu** option from the list.
4. From the **Admin Menu**, select **U** and then click **User**. The **User Search** window appears.
5. Enter the name of the user who must be able to generate reports from ORMB. For example, enter **SYSUSER** in the **User ID** field and press **Enter**. The **User** screen appears.
6. Click the **Access Security** tab.
7. Enter *** in the **Default Access Group** field.
8. Click **Save**.

1.7.6 Granting Access to the CILZRPTP Application Service

A user can access the **Report Submission** screen only when the user group to which the user belongs has access to the CILZRPTP application service. To grant access to the CILZRPTP application service:

1. Login to Oracle Revenue Management and Billing using the SYSUSER credentials.
2. Click the **Menu** link in the **Actions/Navigation** area. A list appears.
3. Select the **Admin Menu** option from the list.
4. From the **Admin Menu**, select **A** and then click **Application Service**. The **Application Service Search** window appears.
5. Enter **CILZRPTP** in the **Application Service** field and press **Enter**. The **Application Service** screen appears.
6. Click the **Application Security** tab.
7. In the **User Groups without Access** zone, click the **Grant Access** button corresponding to the user group to whom you want to grant access to the CILZRPTP application service. The **User Group** screen appears.
8. Ensure that the **Application Services** tab is selected.
9. Enter the date till when you want to grant access to the application service in the **Expiration Date** field.

10. Enter **C** in the **Access Mode** field and press **Enter**. The access mode description appears corresponding to the **Access Mode** field.
11. Click the **Plus** ( ) icon to add another access mode.
12. Enter **R** in the **Access Mode** field and press **Enter**. The access mode description appears corresponding to the **Access Mode** field.
13. Click **Save**.
14. Go back to the **Application Service** screen.
15. In the **Application Security** tab, note that the user group is added in the **User Groups with Access** zone. This indicates that the user group now has access to the CILZRPTP application service.

1.7.7 Granting Access to Sample Report's Application Service

Each sample report has a corresponding application service. The sample report and its application service has same name. For example, the application service for the CI_CSEOPN report is named as CI_CSEOPN.

A user can generate a sample report only when the user group to which the user belongs has access to the respective application service. To grant access to the CI_CSEOPN application service:

1. Login to Oracle Revenue Management and Billing using the SYSUSER credentials.
2. Click the **Menu** link in the **Actions/Navigation** area. A list appears.
3. Select the **Admin Menu** option from the list.
4. From the **Admin Menu**, select **A** and then click **Application Service**. The **Application Service Search** window appears.
5. Enter **CI_CSEOPN** in the **Application Service** field and press **Enter**. The **Application Service** screen appears.
6. Click the **Application Security** tab.
7. In the **User Groups without Access** zone, click the **Grant Access** button corresponding to the user group to whom you want to grant access to the CI_CSEOPN application service. The **User Group** screen appears.
8. Ensure that the **Application Services** tab is selected.
9. Enter the date till when you want to grant access to the application service in the **Expiration Date** field.
10. Enter **A** in the **Access Mode** field and press **Enter**. The access mode description appears corresponding to the **Access Mode** field.
11. Click the **Plus** ( ) icon to add change access mode.
12. Enter **C** in the **Access Mode** field and press **Enter**. The access mode description appears corresponding to the **Access Mode** field.
13. Click the **Plus** ( ) icon to add delete access mode.
14. Enter **D** in the **Access Mode** field and press **Enter**. The access mode description appears corresponding to the **Access Mode** field.
15. Click the **Plus** ( ) icon to add inquiry access mode.

16. Enter **R** in the **Access Mode** field and press **Enter**. The access mode description appears corresponding to the **Access Mode** field.
17. Click **Save**.
18. Go back to the **Application Service** screen.
19. In the **Application Security** tab, note that the user group is added in the **User Groups with Access** zone. This indicates that the user group now has access to the CI_CSEOPN application service.

Similarly, you need to grant access to the following application services so that the user can generate the respective sample report:

- CI_CSESGS
- CI_CSESTS
- CI_CUSTCN
- CI_GLACSM
- CI_LTRGN_ENG
- CI_PMTBAL
- CI_RCVAGA
- CI_TDENTR
- CI_TXPYBL

1.8 Configuring the Oracle BI Publisher Server

While configuring the Oracle BI Publisher Server, you need to:

1. Set the Security Model for BI Publisher
2. Restart the BI Publisher Server
3. Create a Data Source
4. Create a User-Defined Role
5. Grant Access to the Data Sources
6. Assign System-Defined Roles to a User-Defined Role
7. Create a User
8. Assign a Role to a User

1.8.1 Setting the Security Model for BI Publisher

Before you create a user-defined role in Oracle BI Publisher, you must set the security model for BI Publisher. To set the security model for BI Publisher:

1. Login to the Oracle BI Publisher Server using the administrator credentials.
2. Click the **Administration** link in the upper right corner of the screen. The **Administration** page appears.
3. Under the **Security Center** section, click the **Security Configuration** link. The **Security Configuration** tab appears.

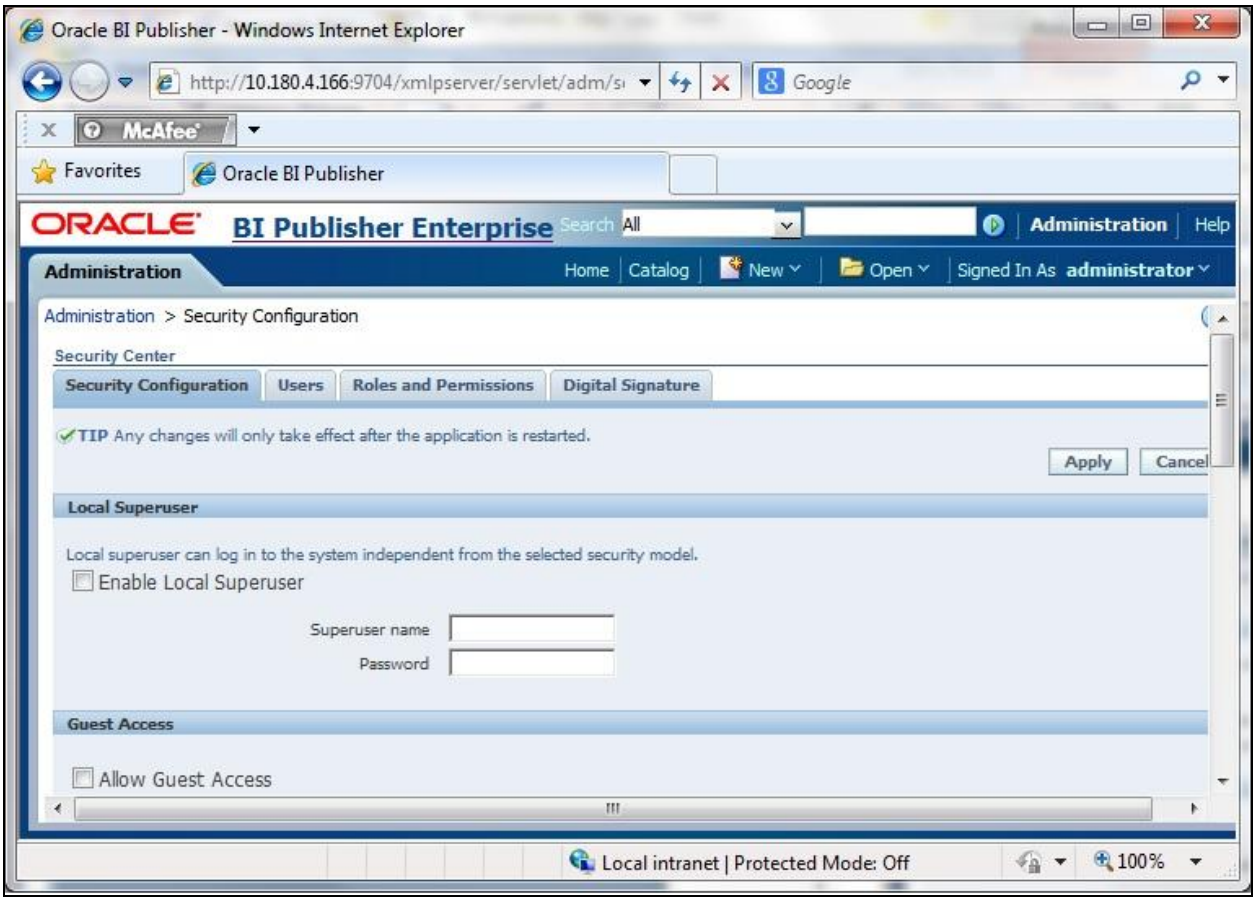

Figure 1: Security Configuration Tab

4. In the **Authorization** section, select the **BI Publisher Security** option from the **Security Model** list.
5. Enter the password for the security model in the **Password** field.

Note: The **Password** field in the **Authorization** section appears only when you select the **BI Publisher Security** option from the **Security Model** list.

6. Click **Apply**. The security model is set to BI Publisher Security.

1.8.2 Restarting the BI Publisher Server

Once you set the security model to BI Publisher Security, you must restart the BI Publisher Server using Oracle Enterprise Manager. To restart the BI Publisher Server:

1. Login to Oracle Enterprise Manager Fusion Middleware Control using the administrator credentials. The **Home** page appears.

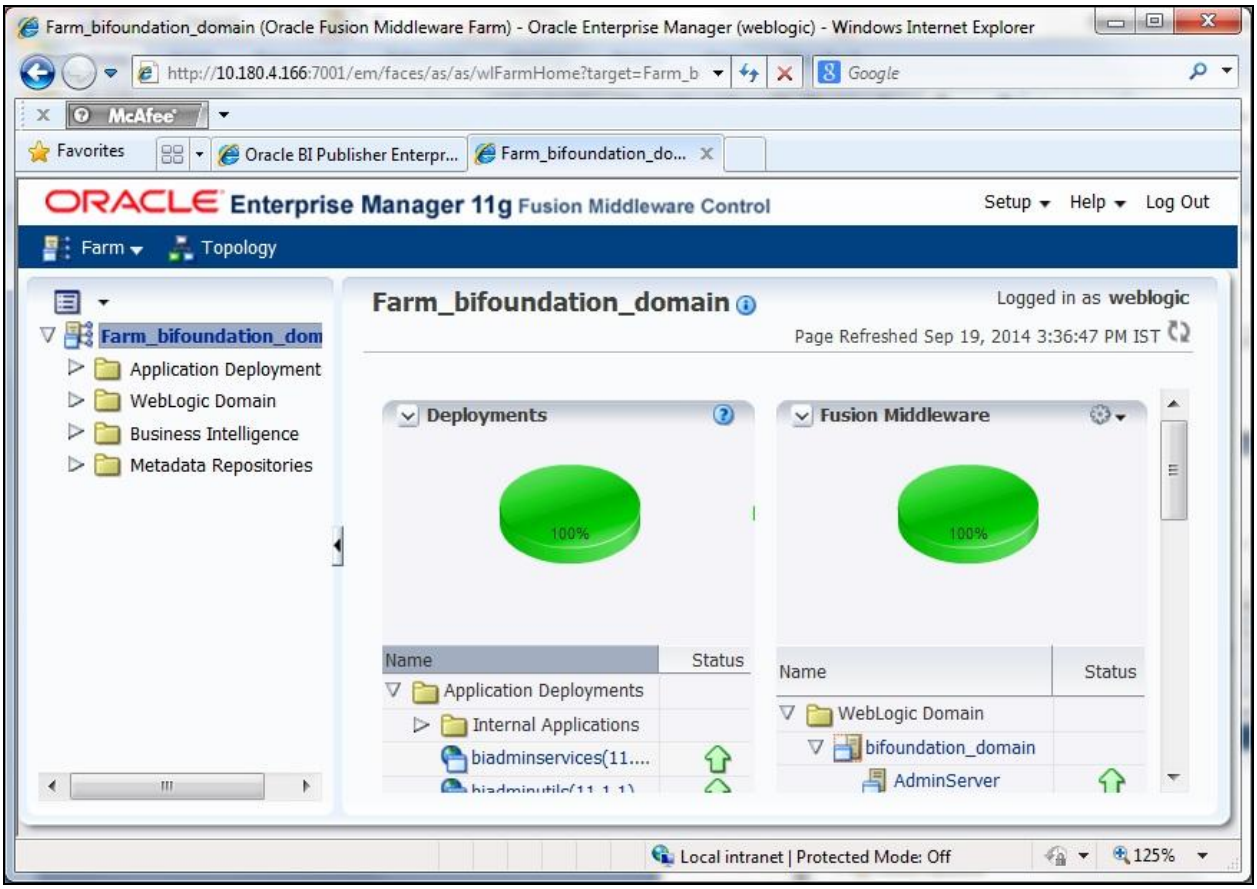

Figure 2: Home Page

2. Expand the **Business Intelligence** folder in the left pane and click **coreapplication**. The **coreapplication** page appears.

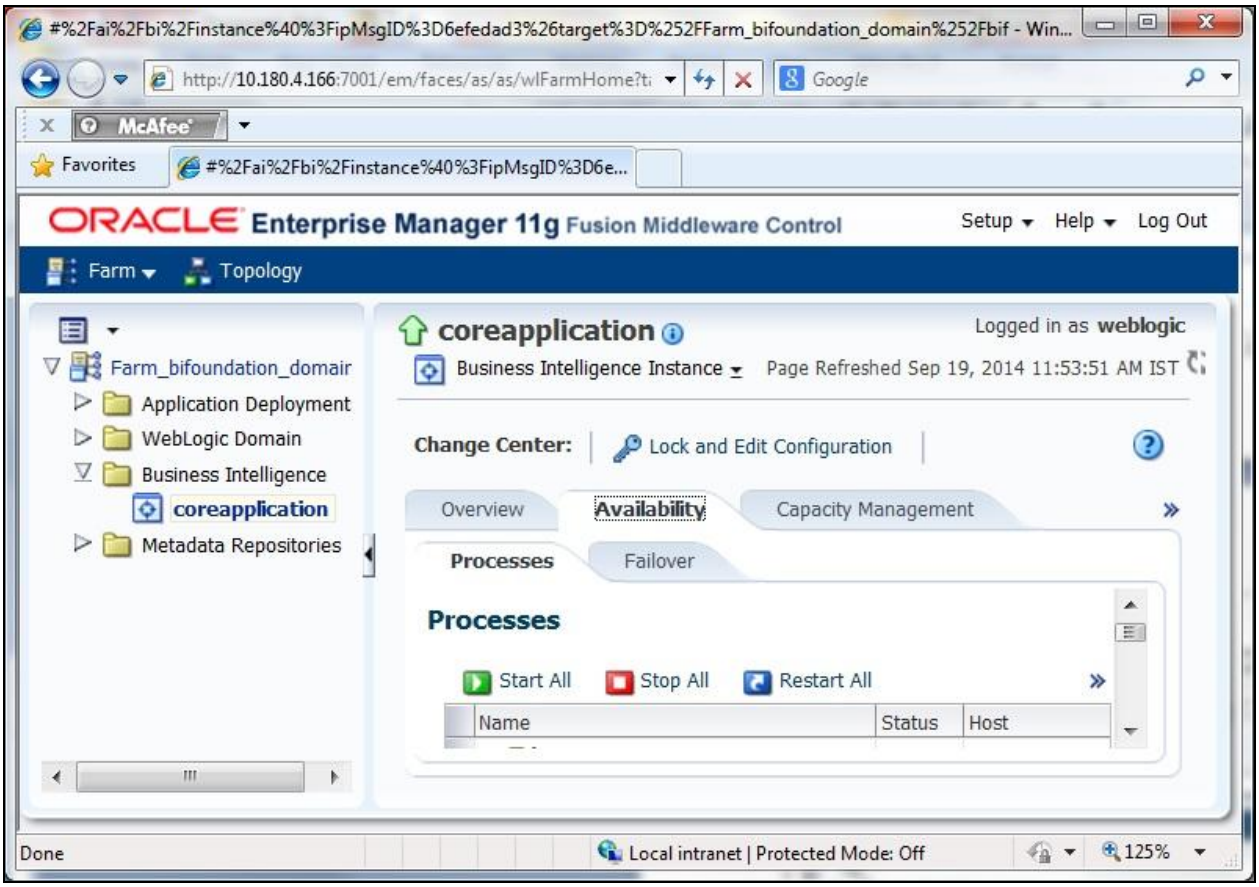

Figure 3: Coreapplication Page

3. Click the **Overview** tab. The **Overview** tab appears.

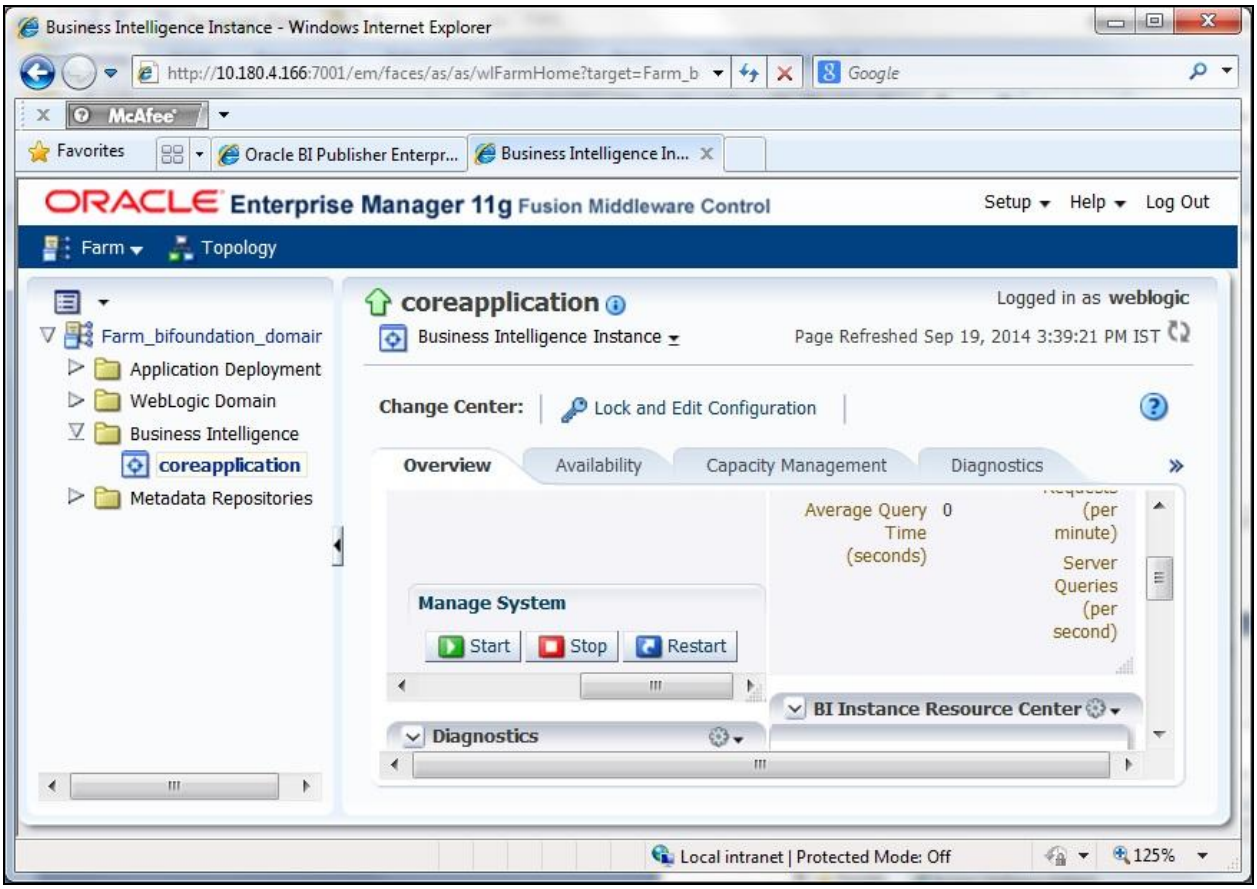

Figure 4: Overview Tab

4. Click the **Restart** (Restart) button. A message appears confirming whether you want to restart all BI components.

Figure 5: Confirmation Window

5. Click **Yes.** The BI Publisher Server is restarted.

1.8.3 Creating a Data Source

To create a data source:

1. Login to the Oracle BI Publisher Server using the administrator credentials.
2. Click the **Administration** link in the upper right corner of this screen. The **Administration** page appears.

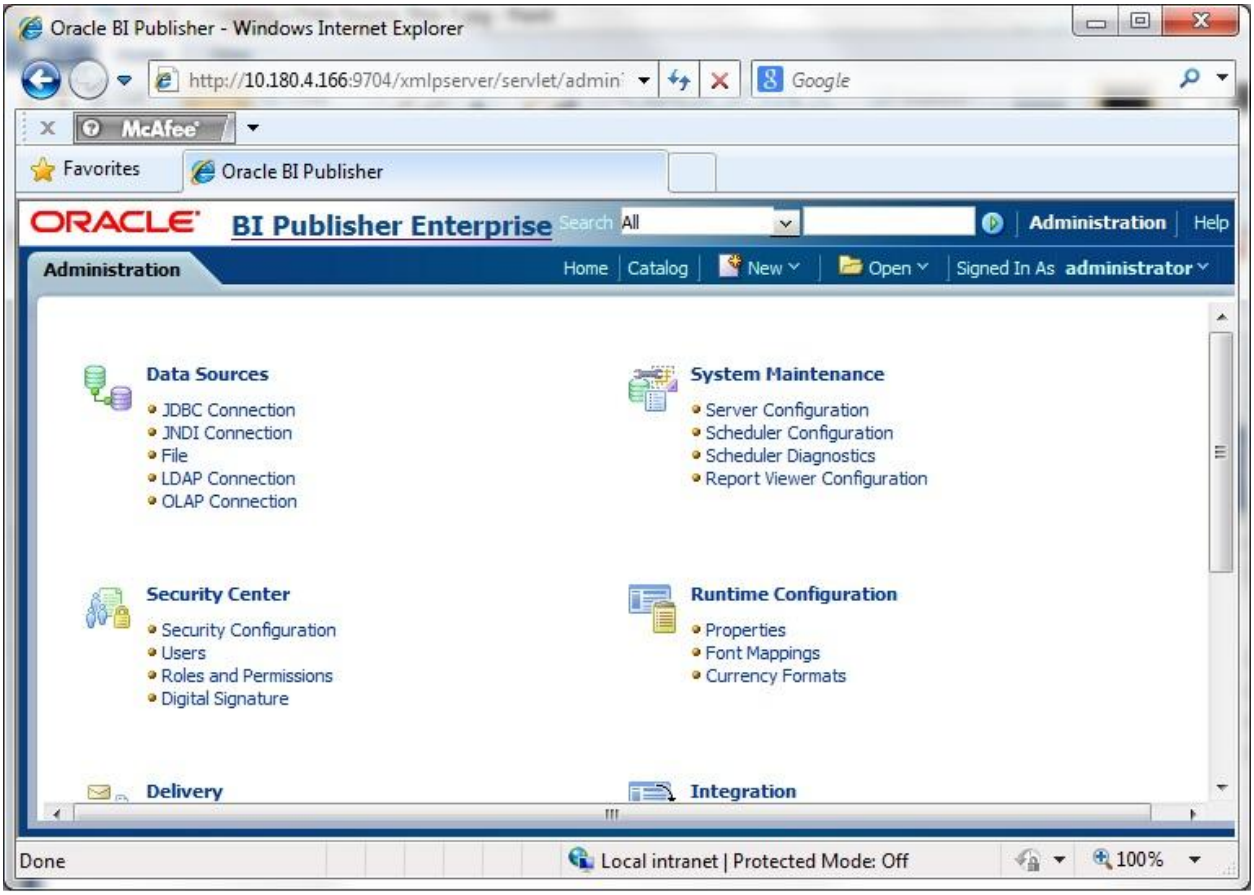

Figure 6: Administration Page

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

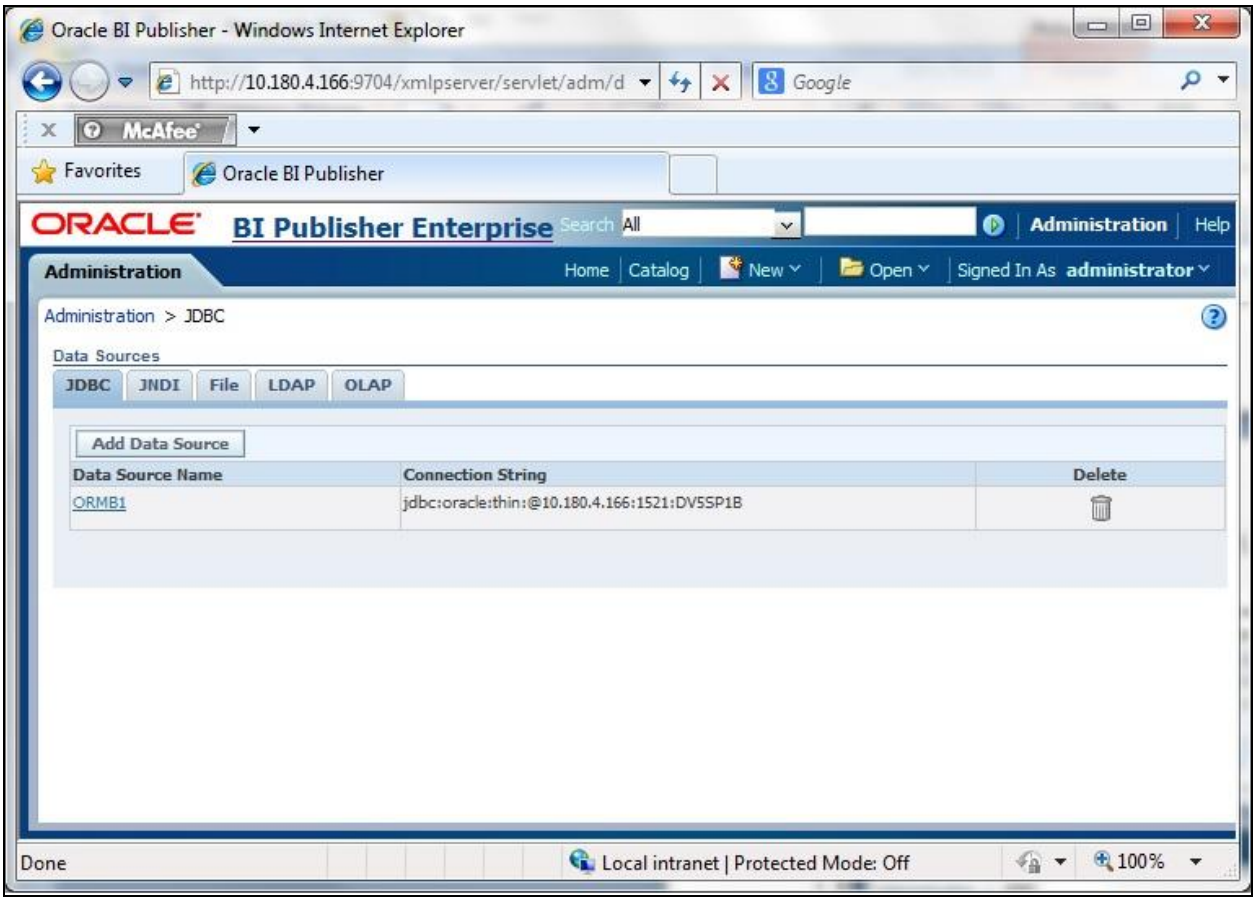

Figure 7: JDBC Tab

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

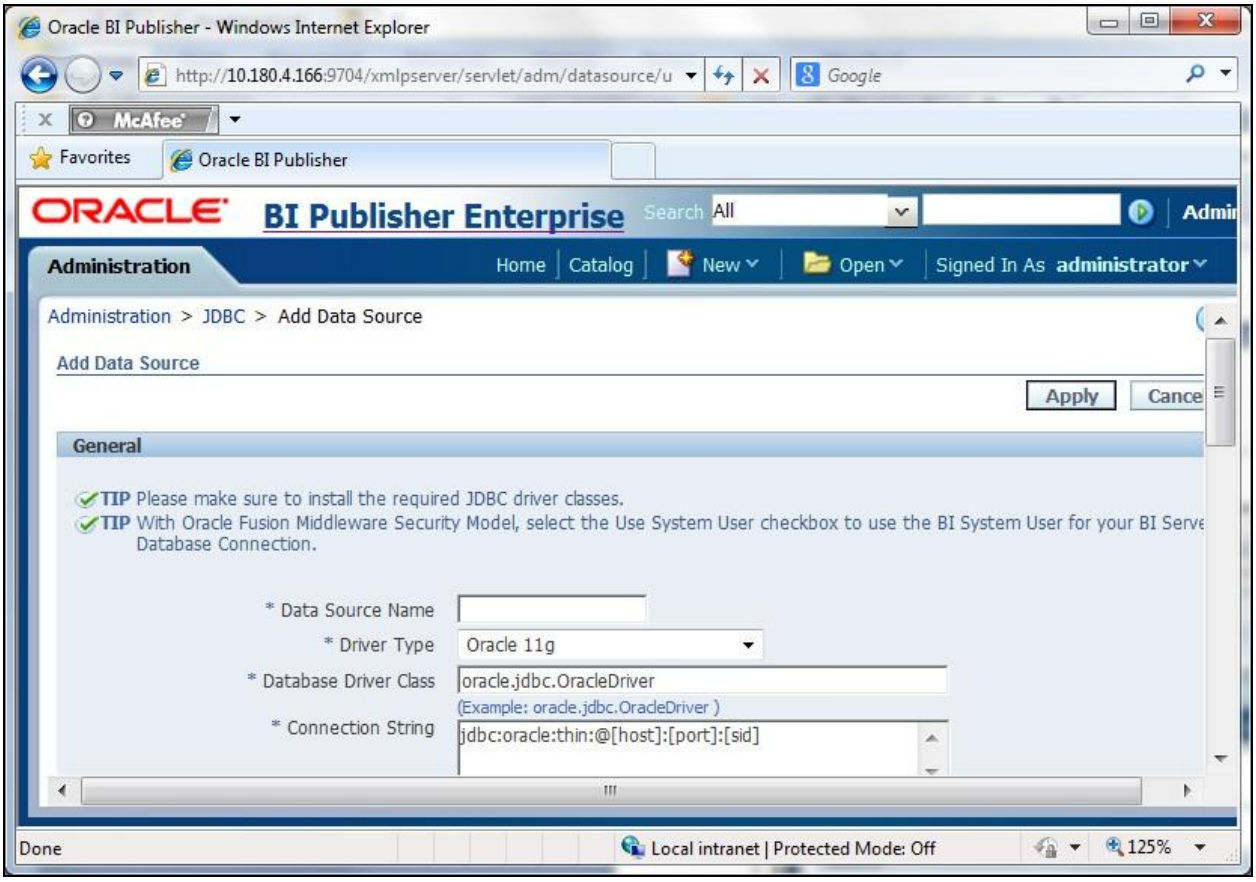

Figure 8: Add Data Source Page

The **Add Data Source** page contains the following three 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: `jdbc:oracle:thin@server:port:sid`
Use System User	Used to indicate that you want to use the BI system user to establish connection to the BI Server database. **Note:** This field is enabled only when you set the security model to Oracle Fusion Middleware.

Field	Description
Username	Used to specify the user name to access the database.
Password	Used to specify the password to access the database.
Pre Process Function	Used to specify the PL/SQL function that you want to execute when a connection to a JDBC data source is established.
Post Process Function	Used to specify the PL/SQL function that you want to execute when a connection to a JDBC data source is closed.
Use Proxy Authentication	When you select the **Use Proxy Authentication** check box, Oracle BI Publisher passes the user name and password of the individual user (as logged into Oracle BI Publisher) to the data source and thus preserves the client identity and privileges when the Oracle BI Publisher server connects to the data source. **Note**: While creating the data source, ensure that the **Use Proxy Authentication** check box is not selected. Otherwise, you will not be able to view the reports in Oracle BI Publisher.

- **Backup Data Source** – Allows you to establish connection to a backup database.
- **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.

1.8.4 Creating a User-Defined Role in Oracle BI Publisher

To create a user-defined role in Oracle BI Publisher:

1. Login to the Oracle BI Publisher Server using the administrator credentials.
2. Click the **Administration** link in the upper right corner of the screen. The **Administration** page appears.
3. Under the **Security Center** section, click the **Roles and Permissions** link. The **Roles and Permissions** tab appears with a list of existing roles.

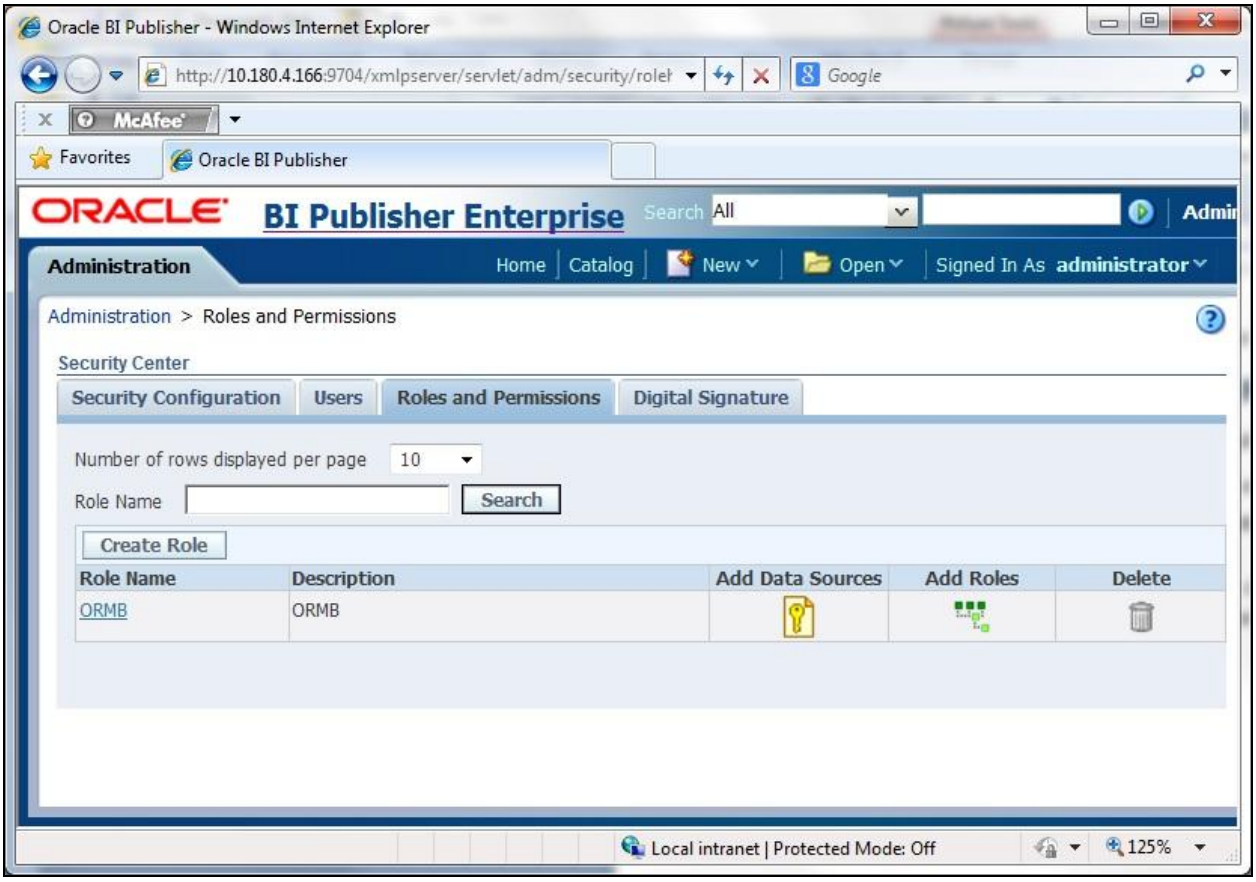

Figure 9: Roles and Permissions Tab

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

Note: The **Create Role** button appears only when you set the security model to **BI Publisher Security** in the **Security Configuration** tab.

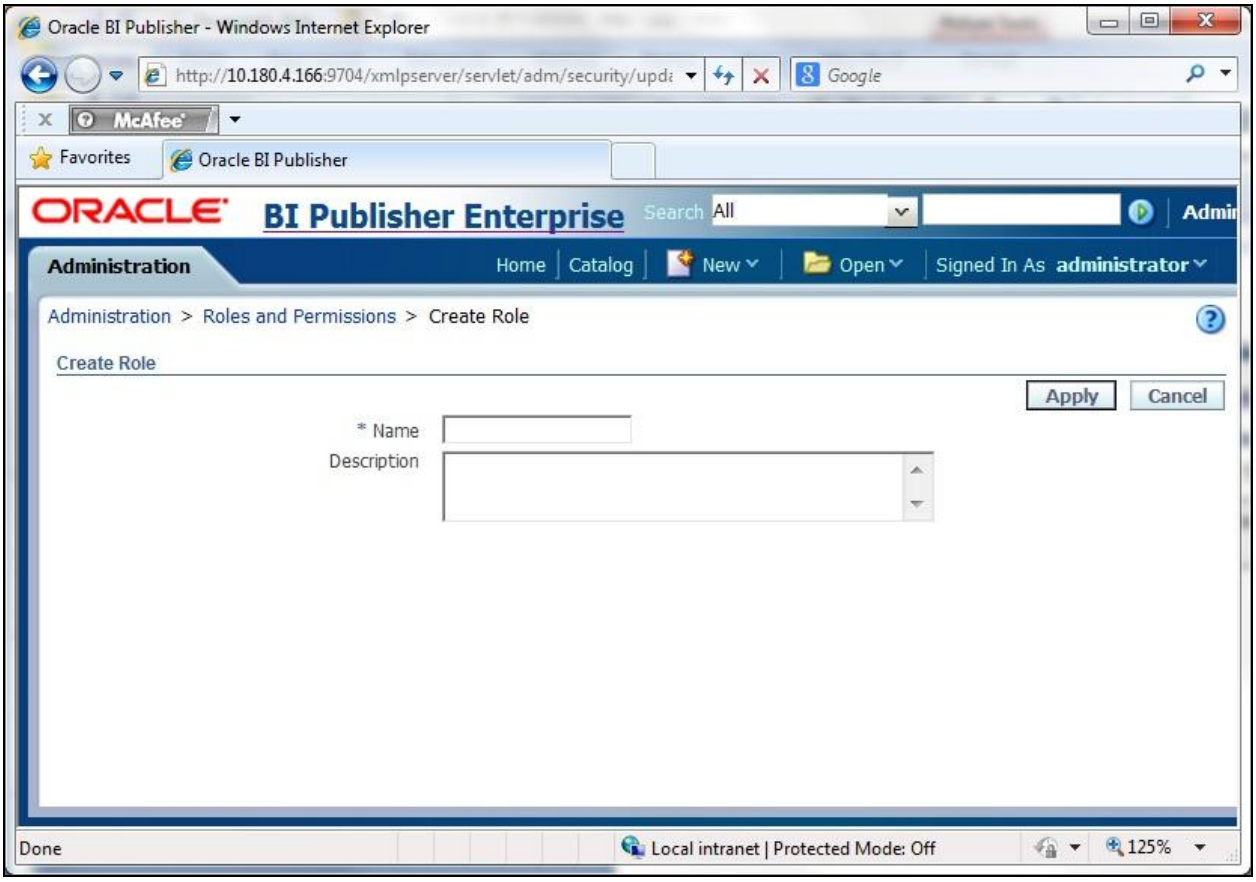

Figure 10: Create Role Page

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.

1.8.5 Granting Access to the Data Source

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 Oracle BI Publisher Server using the administrator credentials.
2. Click the **Administration** link in the upper right corner of the screen. The **Administration** page appears.
3. Under the **Security Center** section, click the **Roles and Permissions** link. The **Roles and Permissions** tab 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.

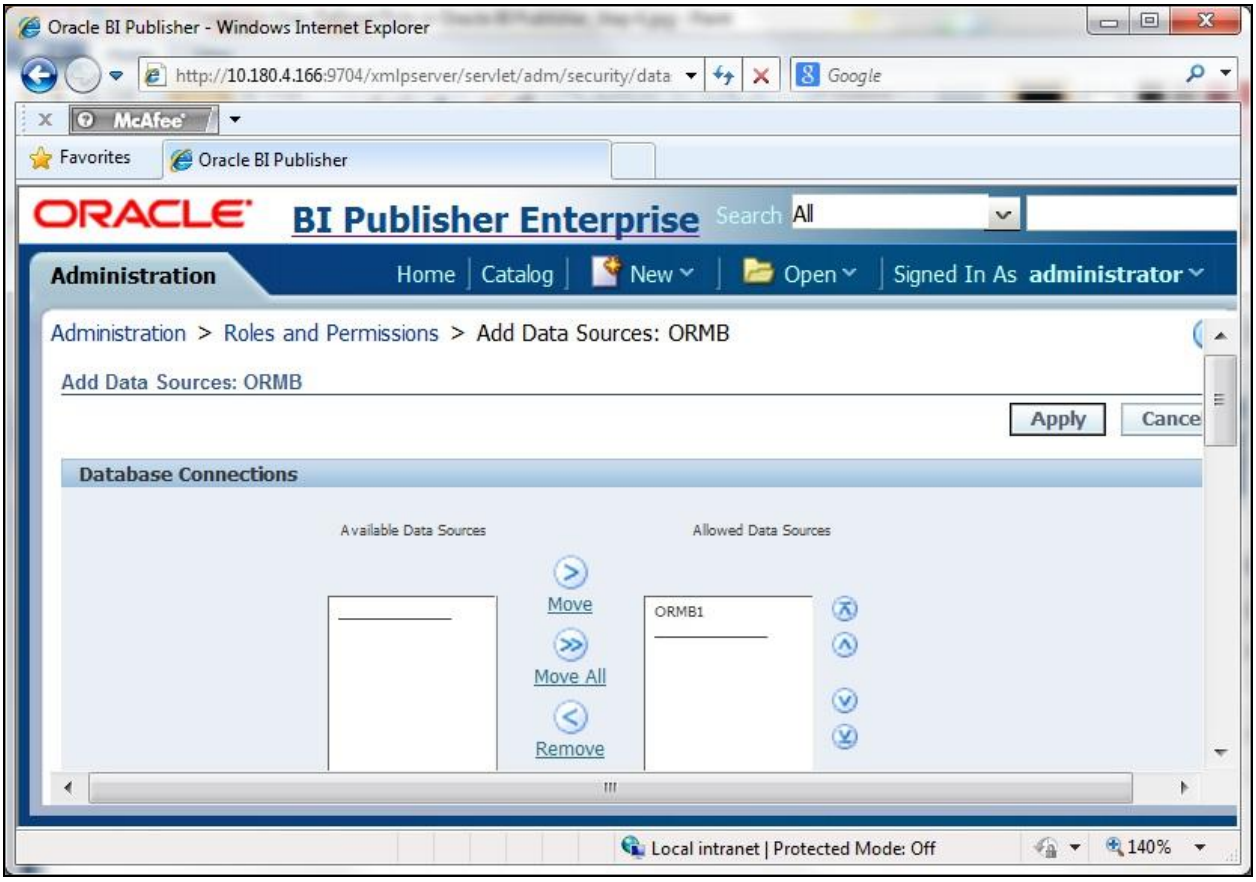

Figure 11: Add Data Sources Page

5. Select the ORMB 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** tab appears.

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

You will be able to perform a set of activities in Oracle 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 Oracle BI Publisher Server using the administrator credentials.
2. Click the **Administration** link in the upper right corner of the screen. The **Administration** page appears.
3. Under the **Security Center** section, click the **Roles and Permissions** link. The **Roles and Permissions** tab 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 12: 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** tab appears.

1.8.7 Creating a User in Oracle BI Publisher

To create a user in Oracle BI Publisher:

1. Login to the Oracle BI Publisher Server using the administrator credentials.
2. Click **Administration** link in the upper right corner of the screen. The **Administration** page appears.
3. Under the **Security Center** section, click the **Users** link. The **Users** tab appears with a list of existing users.

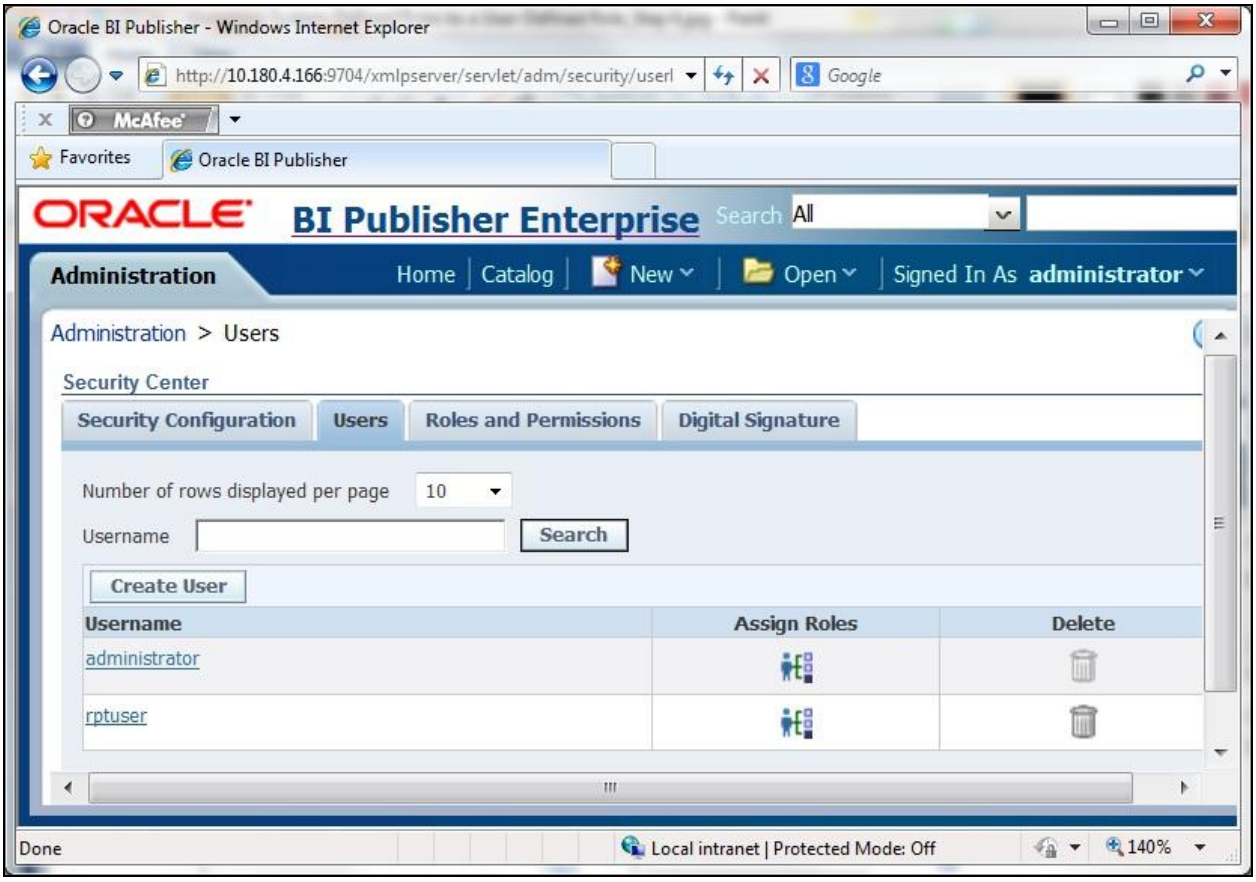

Figure 13: Users Tab

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

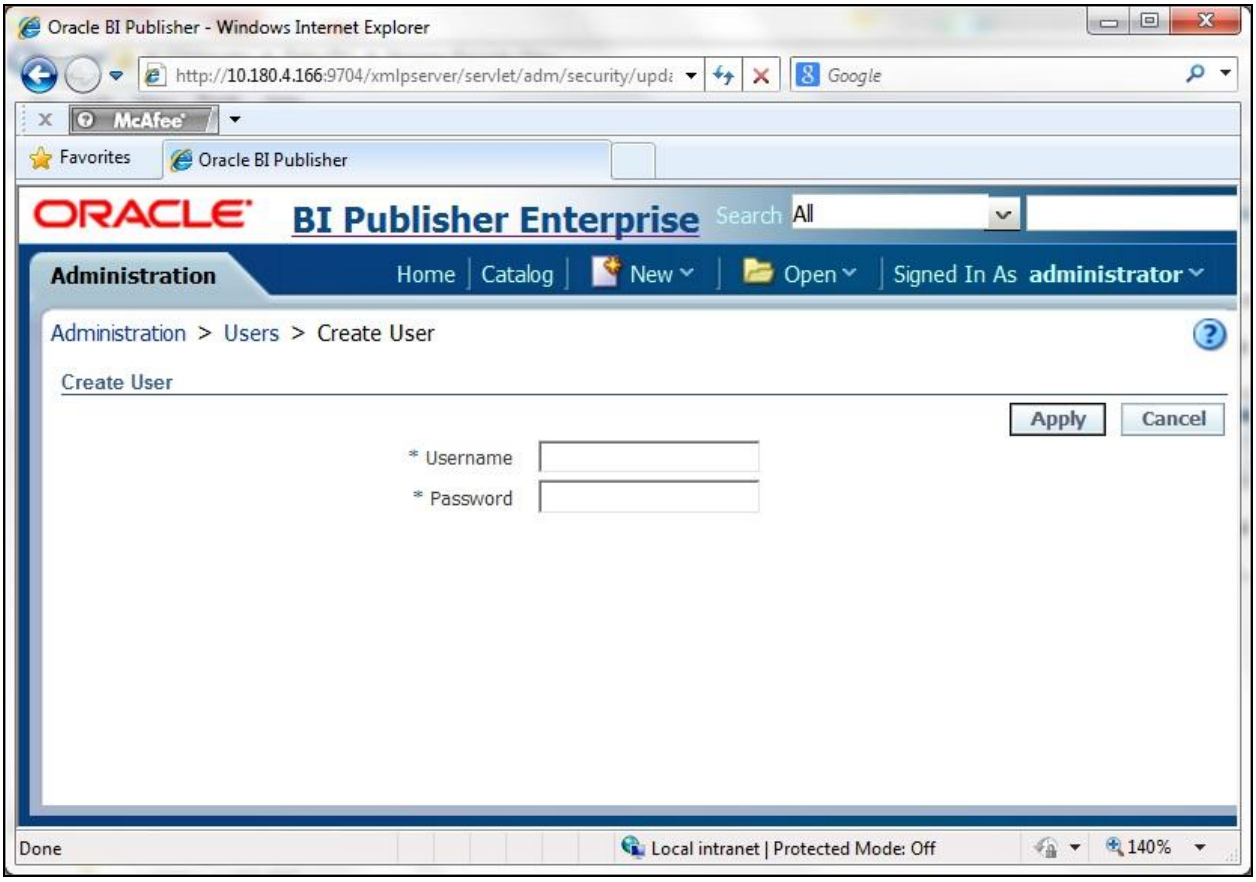

Figure 14: Create User Page

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

1.8.8 Assigning a Role to a User

To assign a role to a user:

1. Login to the Oracle BI Publisher Server using the administrator credentials.
2. Click the **Administration** link in the upper right corner of the screen. The **Administration** page appears.
3. Under the **Security Center** section, click the **Users** link. The **Users** tab 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.

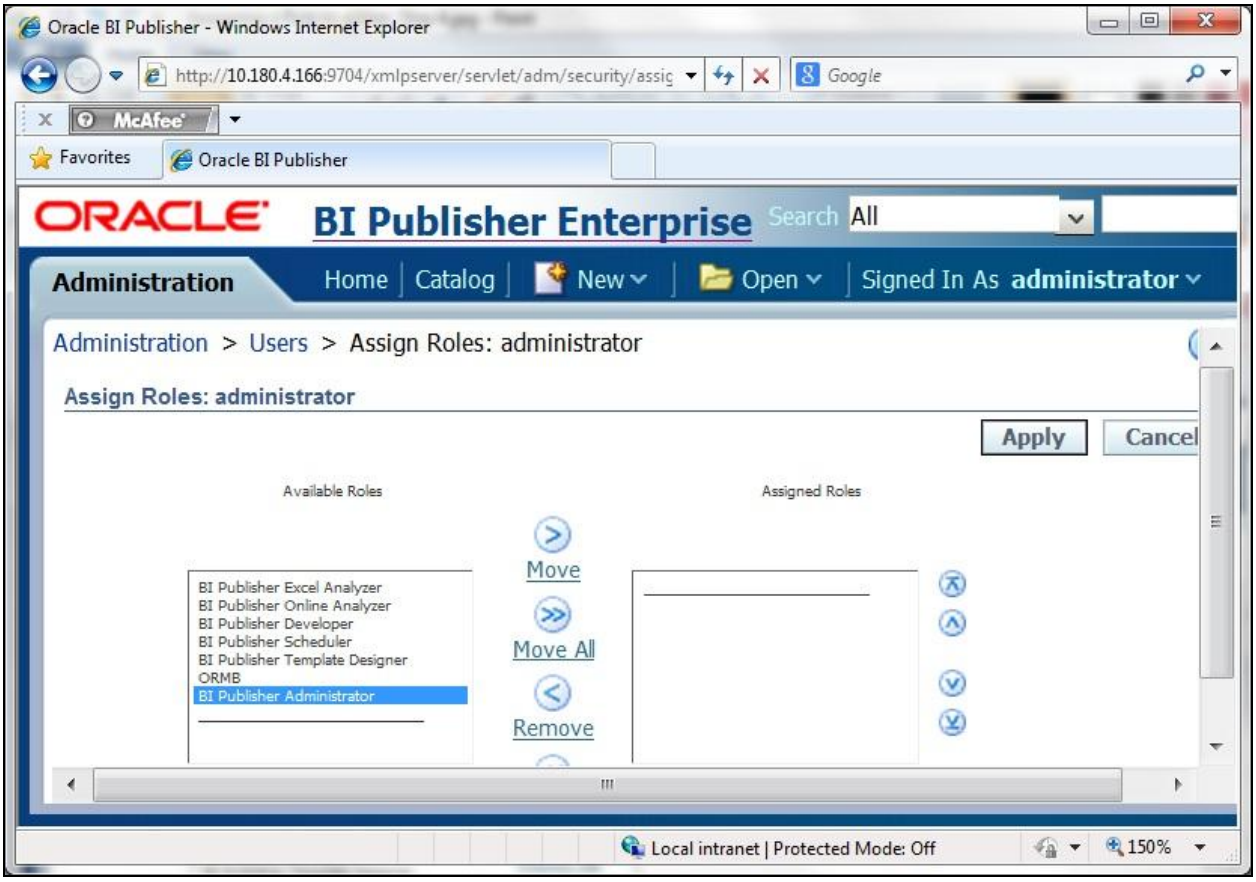

Figure 15: Assign Roles Page

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** tab appears.

1.9 Publishing Sample Reports in Oracle BI Publisher

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.

To publish these sample reports in Oracle BI Publisher:

1. Login to the Oracle BI Publisher Server using the RPTUSER credentials. The **Home** page appears.

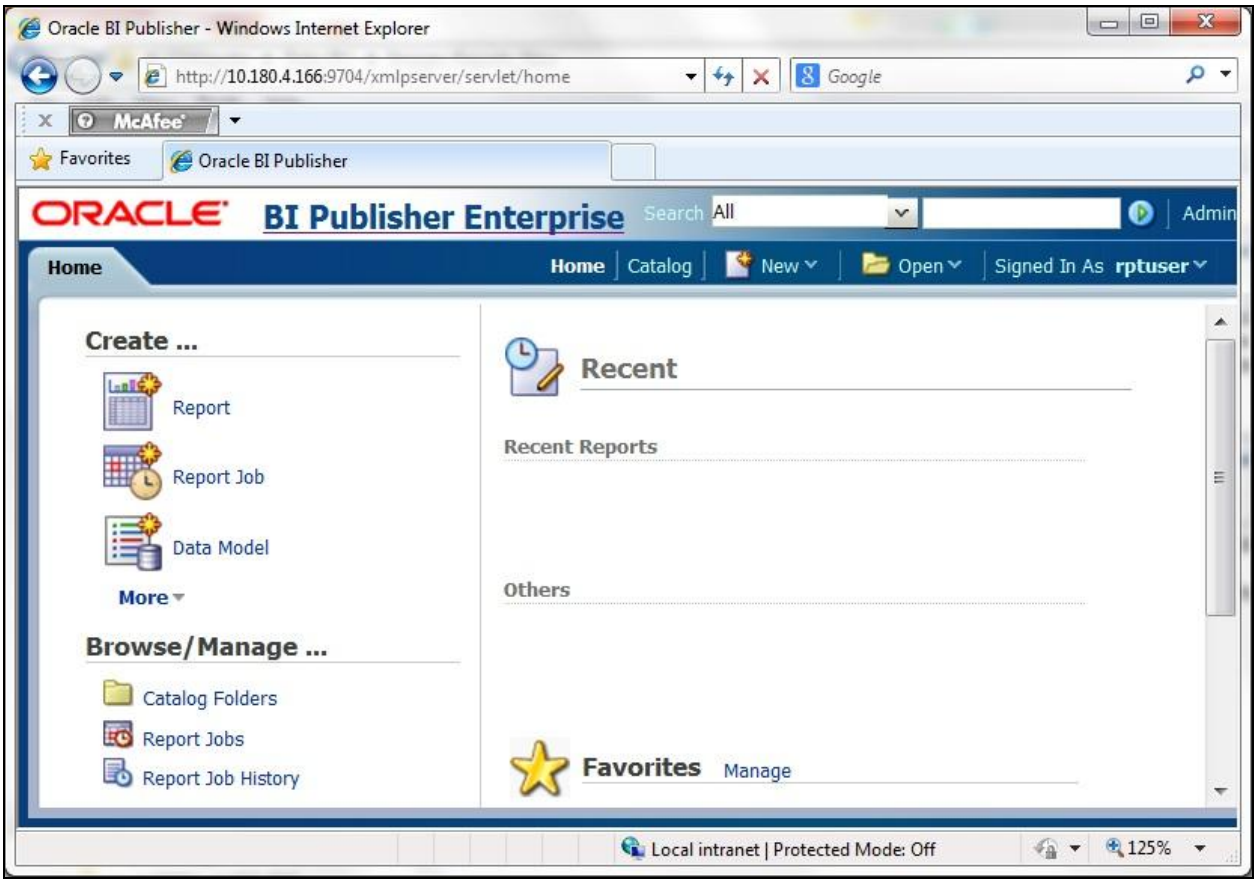

Figure 16: Home Page

2. Click the **Catalog** link in the upper right corner of this screen. The **Catalog** page appears.

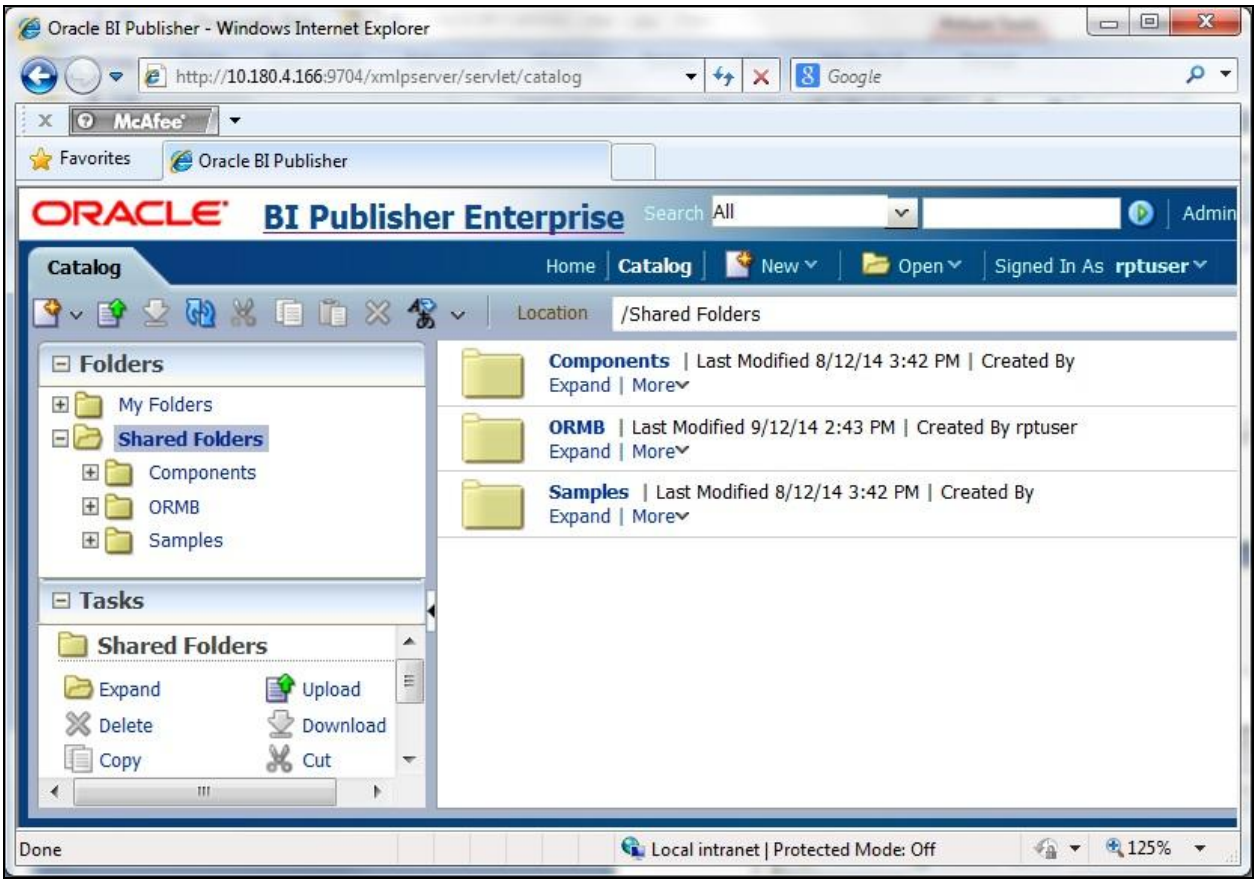

Figure 17: Catalog Page

Tip: Alternatively, you can access the **Catalog** page by clicking the **Catalog Folders** link in the left pane of the **Home** page.

3. Click the **Upload Resource** ( ) icon in the toolbar. The **Upload** dialog box appears.

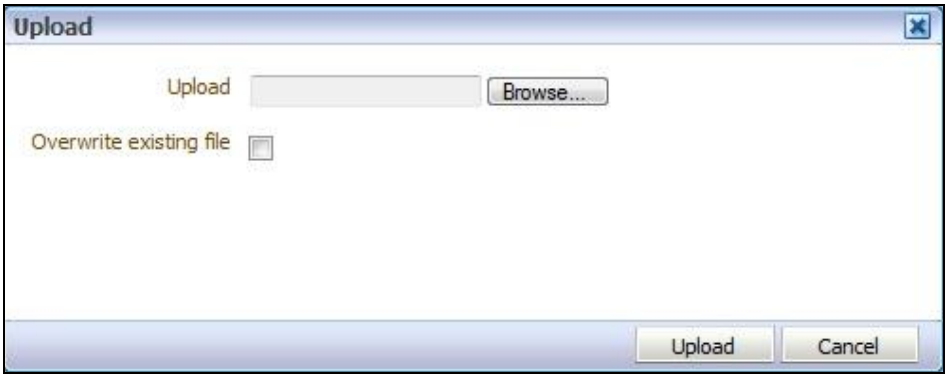

Figure 18: Upload Window

4. Click **Browse**. The **Choose File to Upload** dialog box appears.

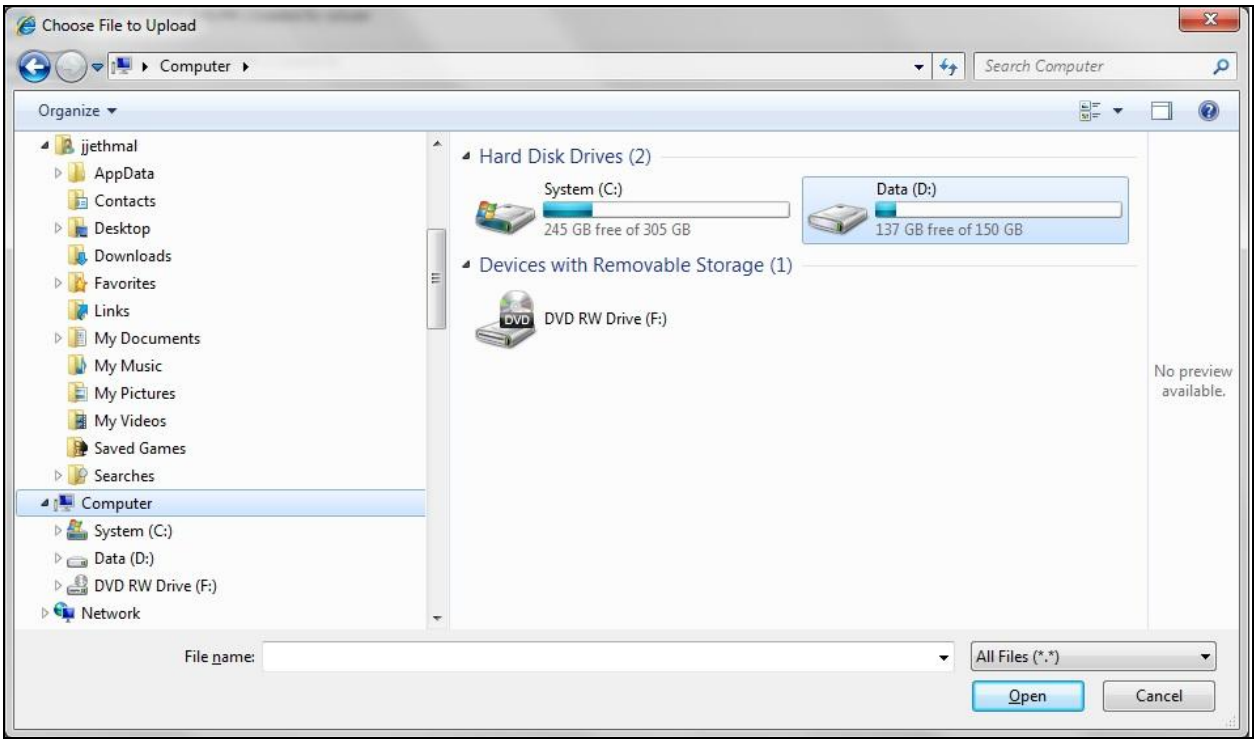

Figure 19: Choose File to Upload Dialog Box

5. Browse to the `..\TEMPDIR\ORMB_Reports\BIPublisher\reportFiles` location where the `ORMB.xdrz` file is available.
6. Select the `ORMB.xdrz` file and click **Open**. The file name and path appears in the **Upload** field.
7. Click **Upload**. The sample reports are uploaded in the `Shared Folders\ORMB` folder.

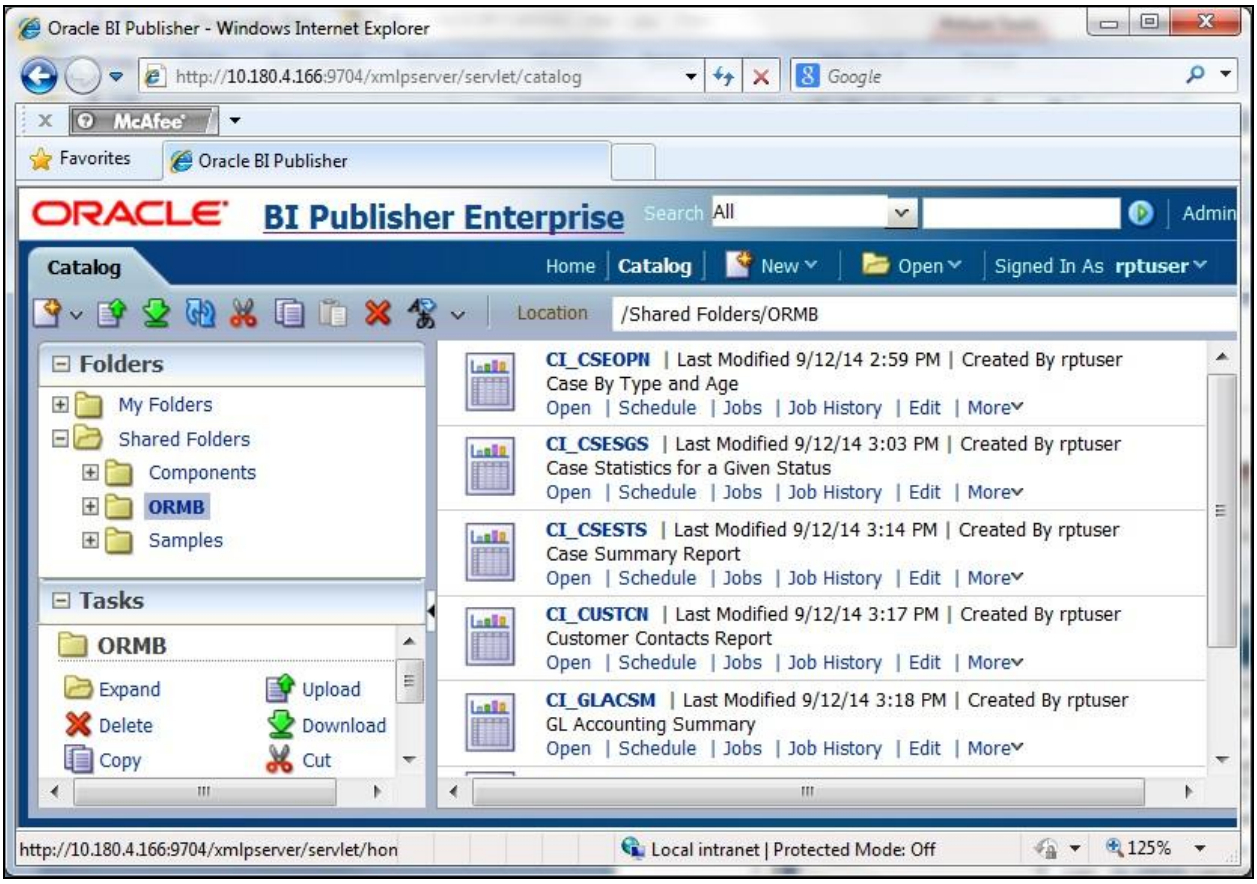

Figure 20: Catalog Page

8. For each report, click the **Edit** link corresponding to the report. The sample report page appears.

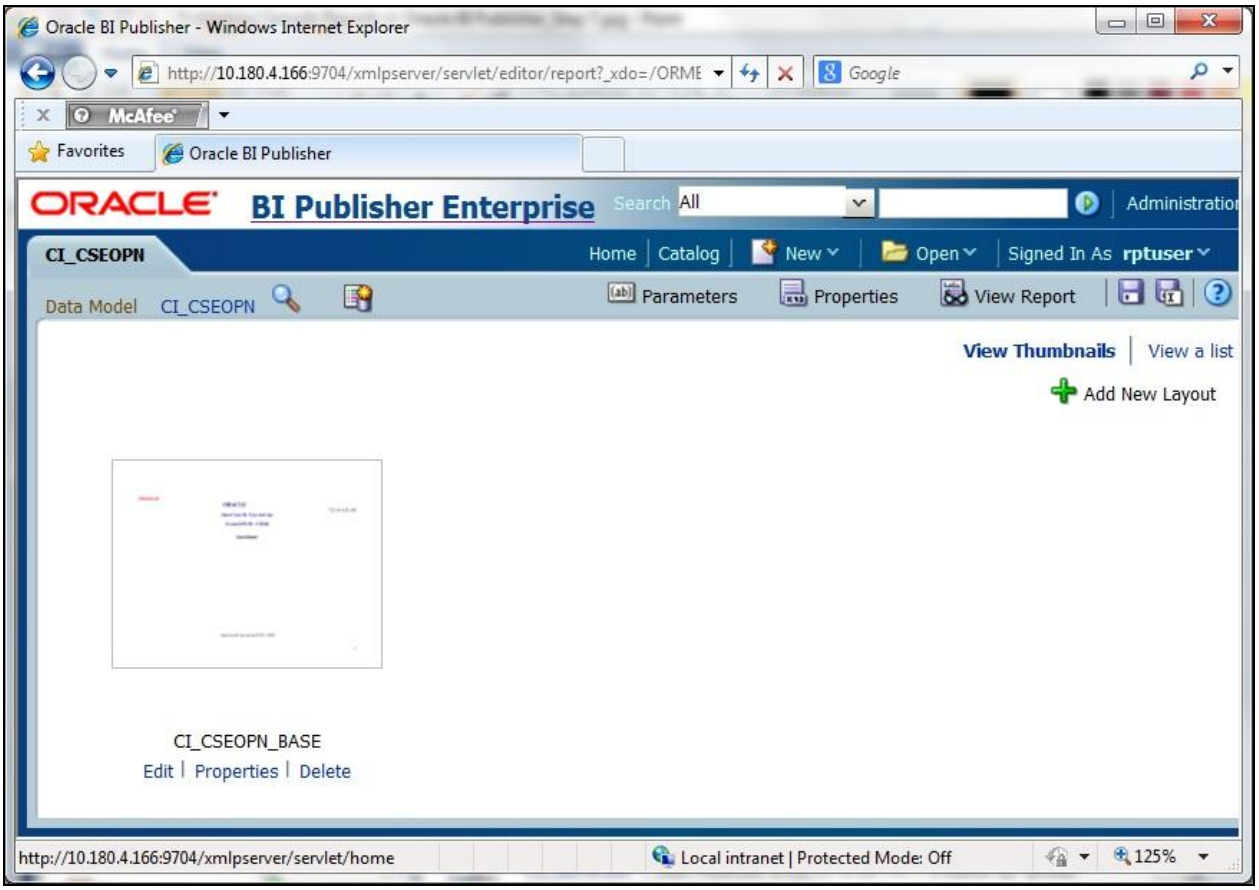

Figure 21: Sample Report Page

9. Click the **Properties (** **)** button in the toolbar. The **Report Properties** dialog box appears.

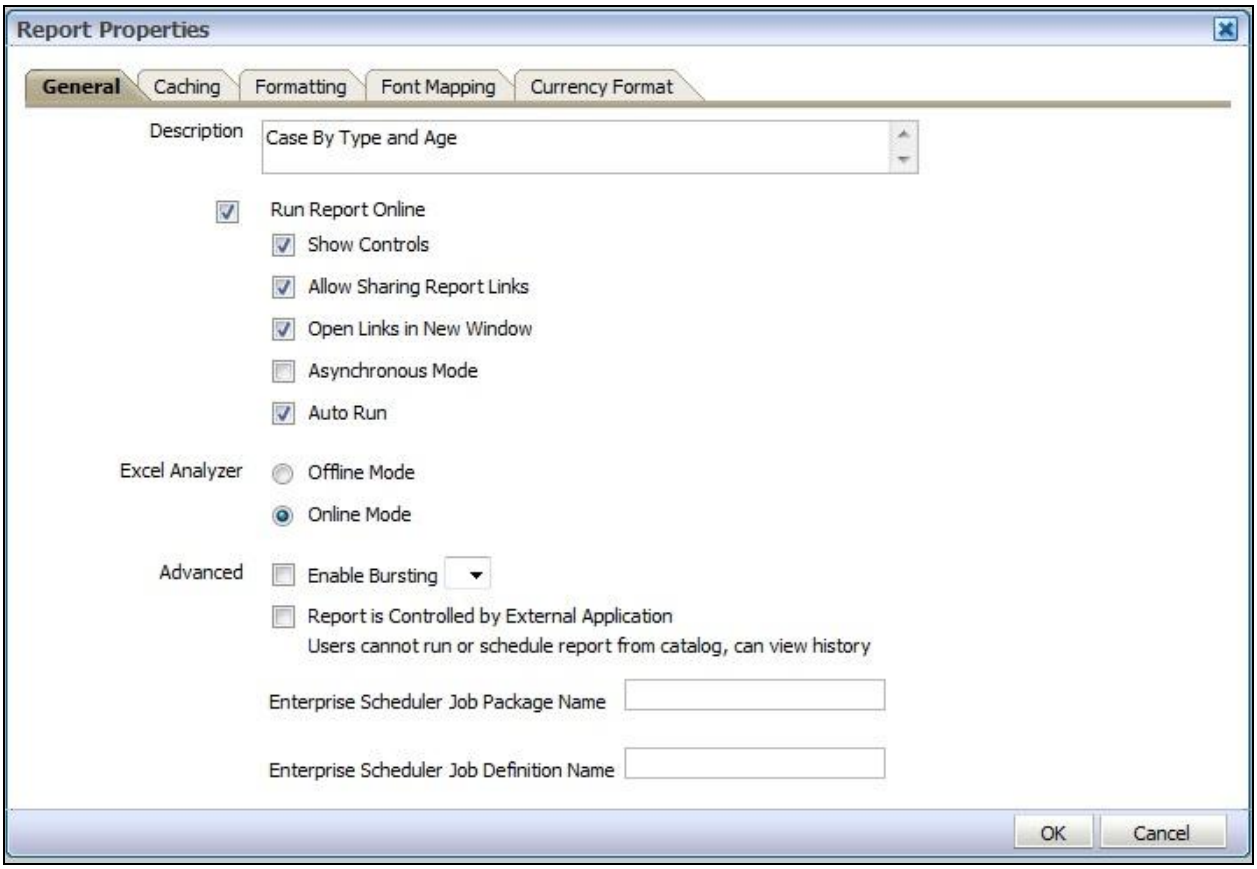

Figure 22: Report Properties Dialog Box

10. Ensure that the **Run Report Online** check box is selected in the **General** tab. Otherwise, you will not be able to view the reports from ORMB.

1.10 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 Oracle Revenue Management and Billing using the SYSUSER credentials.
2. Click the **Menu** link in the **Actions/Navigation** area. A list appears.
3. Select the **Admin Menu** option from the list.
4. From the **Admin Menu**, select **I** and then click **Installation Options – Framework**. The **Installation Options – Framework** screen appears.
5. Click the **Messages** tab. The **Messages** tab appears.
6. Click the **Add** ( ) icon to add a new message.
7. Select **Company Title for Reports** from the **Installation Message Type** list.
8. Enter your company name in the **Installation Message Text** field.

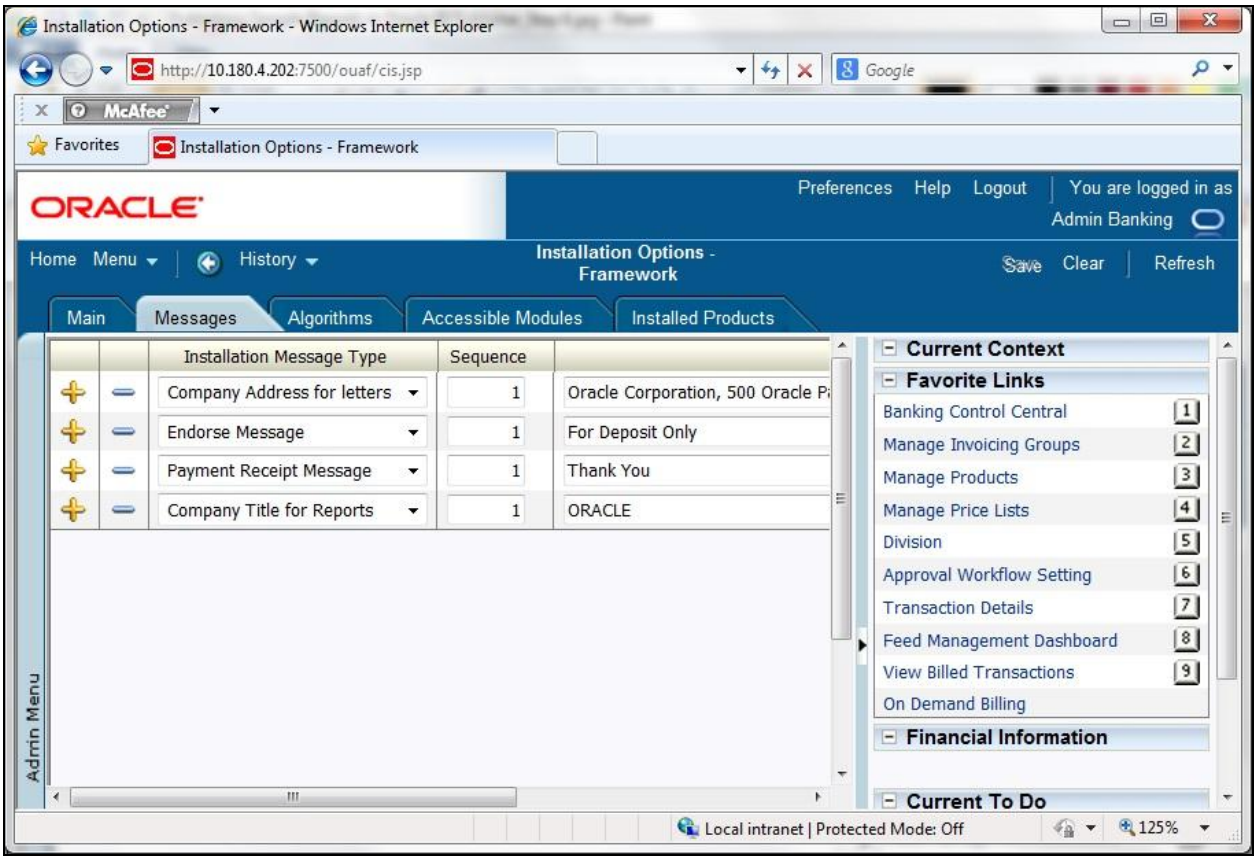

Figure 23: Installation Options – Framework Screen

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

Note:

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.

1.11 Defining a Company Address

To define a company address for letters:

1. Login to Oracle Revenue Management and Billing using the SYSUSER credentials.
2. Click the **Menu** link in the **Actions/Navigation** area. A list appears.
3. Select the **Admin Menu** option from the list.
4. From the **Admin Menu**, select **I** and then click **Installation Options – Framework**. The **Installation Options – Framework** screen appears.
5. Click the **Messages** tab. The **Messages** tab appears.
6. Click the **Add** ( ) icon to add a new message.
7. Select **Company Address for letters** from the **Installation Message Type** list.
8. Enter your company address in the **Installation Message Text** field.

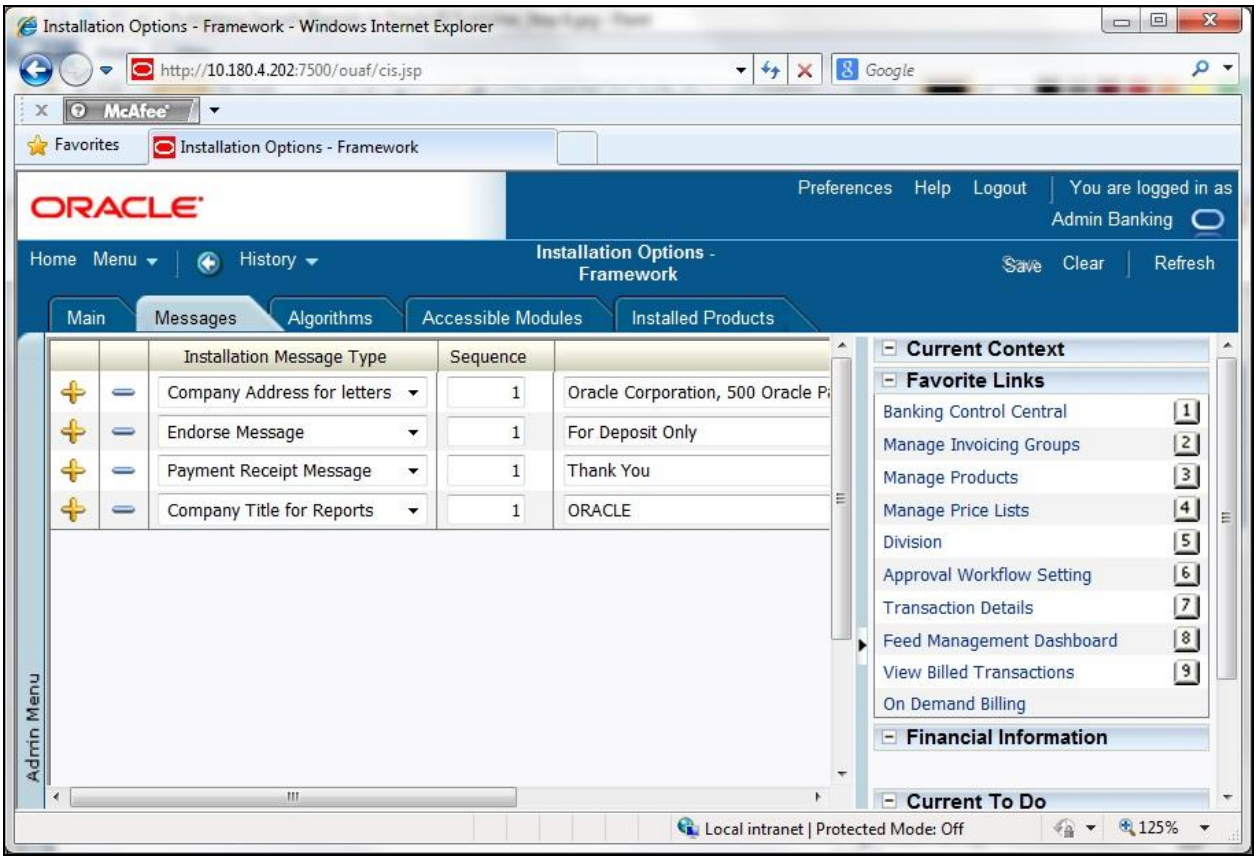

Figure 24: Installation Options – Framework Screen

9. Click **Save**.

1.12 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 is installed:

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

1.13 Copying Sample Reports Definition in ORMB

If you are using a blank database, you need to copy the sample reports' definition in ORMB so that you can generate reports from ORMB. To copy the sample reports' definition in ORMB:

1. Connect to the ORMB database using any SQL client (such as Oracle SQL Developer or PL/SQL Developer) and the `cisadm` credentials.
2. Execute the `report-definition.sql` query from the `..\TEMPDIR\ORMB_Reports\BI-Publisher\reportDefinitions` folder.

Note: You do not have to copy the sample reports' definition in the demo database. This is because the sample reports' definition is already available in the demo database.

1.14 Generating Sample Reports

Oracle Revenue Management and Billing provides you with the following reports that you can use for reporting or as a starting point for creating a new report:

- Open Cases by Type (CI_CSEOPN)
- Case Statistics for a Given Status (CI_CSESGS)
- Case Statistics by Case Type (CI_CSESTS)
- Customer Contact by Type (CI_CUSTCN)
- GL Accounting Summary (CI_GLACSM)
- Letter Print - Sample Welcome Letter (CI_LTRGN_ENG)
- Payments Balance (CI_PMTBAL)
- Receivables Aging (CI_RCVAGA)
- To Do Entries (CI_TDENTR)
- Tax Payables Analysis (CI_TXPYBL)

The **Report Submission** screen allows you to generate these reports. For more information on how to generate these reports, refer to the Reporting chapter in *Oracle Revenue Management and Billing Banking User Guide*.

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. From the **Admin Menu**, select **R** and then click the **Add** ( ) icon corresponding to the **Report Definition** menu option. The **Report Definition** screen appears.

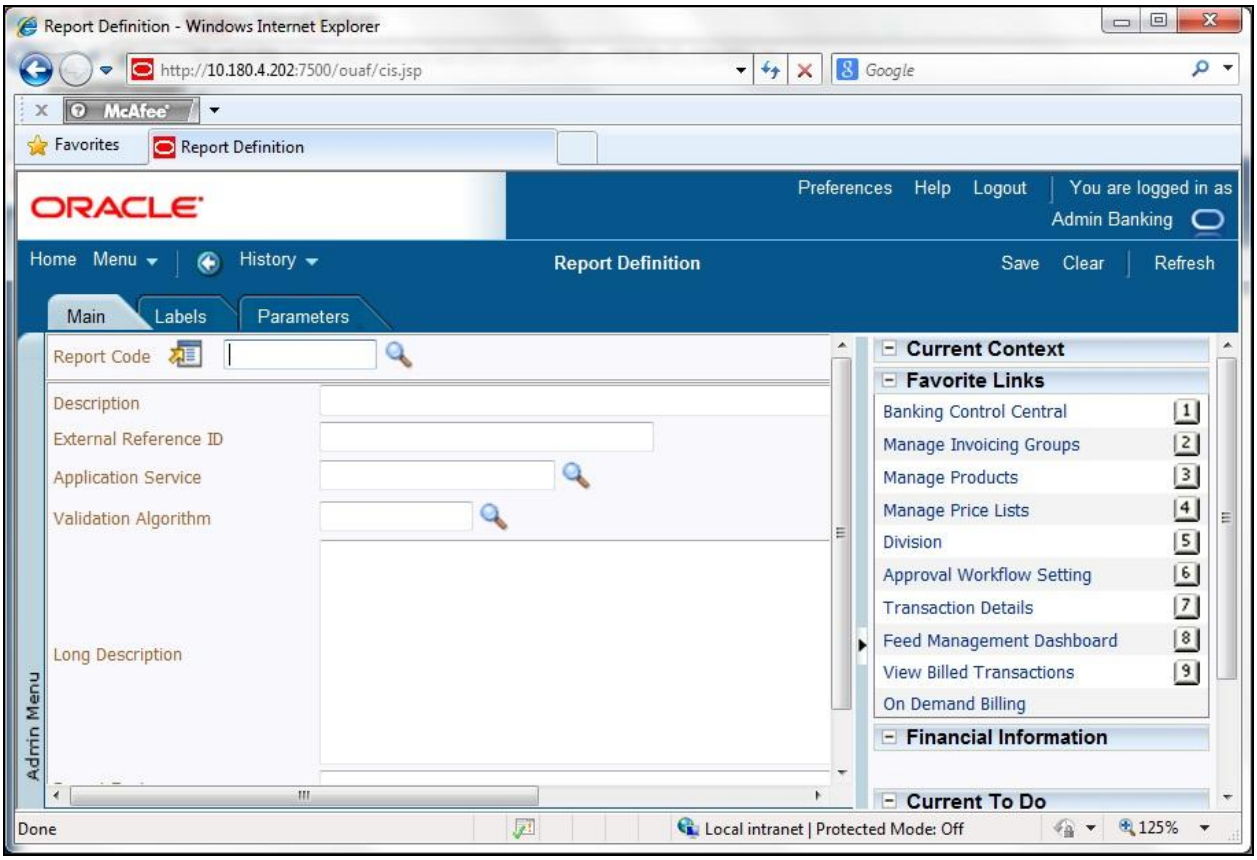

Figure 25: Report Definition – Main Tab

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. **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. **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. **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. **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. **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. **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. **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.

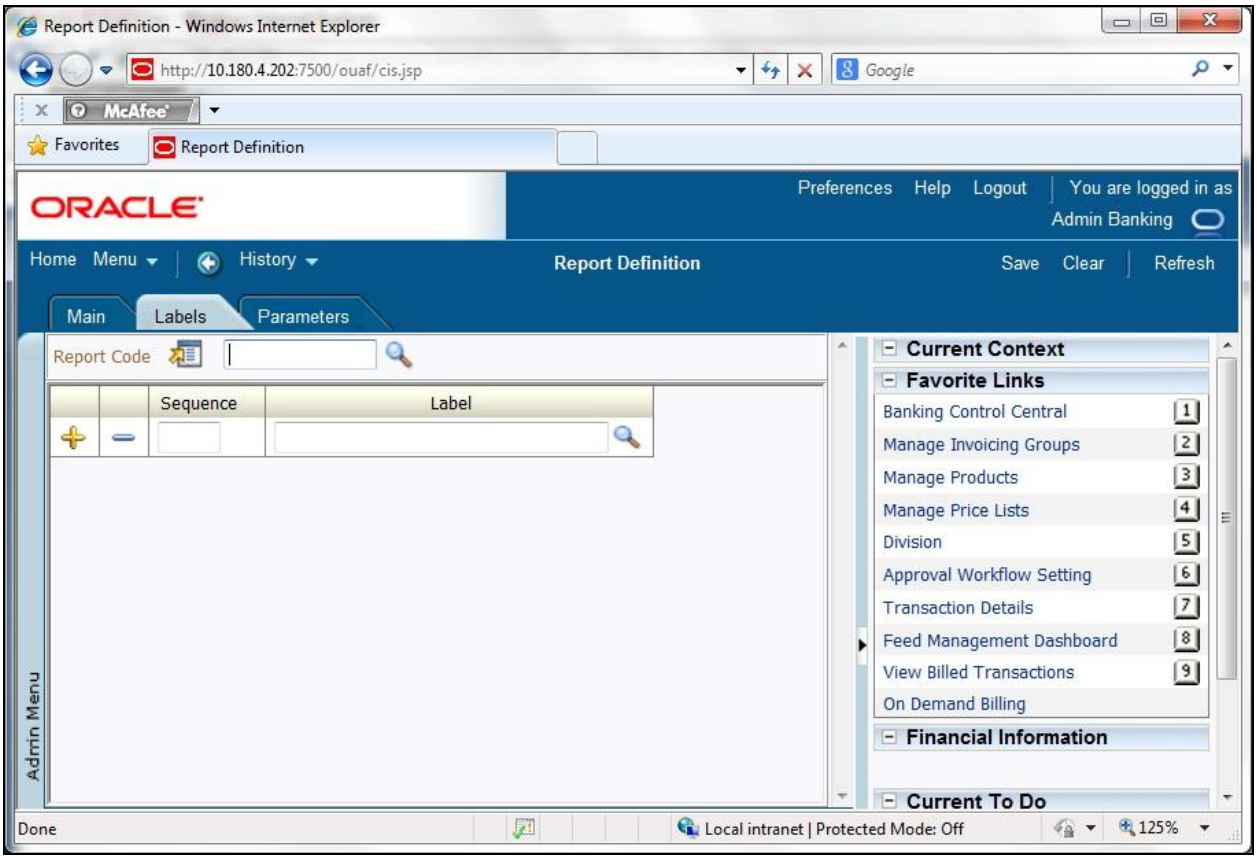

Figure 26: Report Definition – Labels Tab

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.

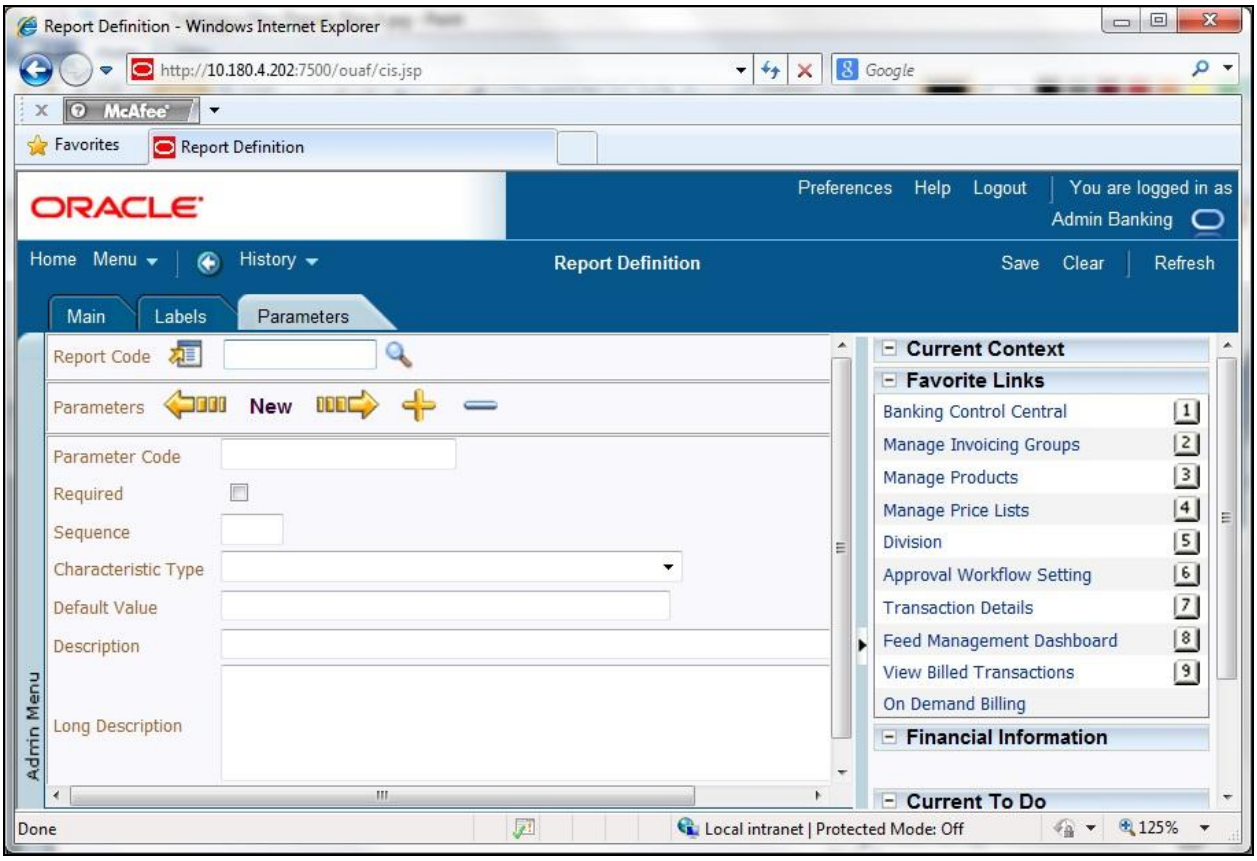

Figure 27: Report Definition – Parameters Tab

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.

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 Oracle 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 Oracle BI Publisher, you need to do the following:

1. Publish the report in Oracle BI Publisher. For more information, refer to the Publishing Sample Reports in Oracle BI Publisher section.
2. Define the report in ORMB. For more information, refer to the Defining a New Report section.
3. Ensure that the user's user group has access to the report's application service.

Appendix A : ORMB V2.3.0.2.0 Patch Numbers

The contents of the RMB V2.3.0.2.0 - <Domain> - <Platform> patch differs depending on the domain and platform-specific patch that you have downloaded. The following table lists the contents of each domain and platform-specific patch:

Domain	Patch Number	Contents Include
Financial Services	20074834	• FW-V4.2.0.2.0-Multiplatform • RMB-V2.3.0.2.0-Documaker-Unix • RMB-V2.3.0.2.0-FW-PREREQ-MultiPlatform • RMB-V2.3.0.2.0-Linux • RMB-V2.3.0.2.0-MicroFocus-Server5.1WP7-Install • RMB-V2.3.0.2.0-MicroFocus-Server5.1WP8-Install • RMB-V2.3.0.2.0-Oracle-Database-MultiplatForm • RMB-V2.3.0.2.0-Release-Notes • RMB-V2.3.0.2.0-Reports • RMB-V2.3.0.2.0-Self-Service • RMB-V2.3.0.2.0-TFM-Interface
Financial Services	20074941	• FW-V4.2.0.2.0-Multiplatform • RMB-V2.3.0.2.0-AIX • RMB-V2.3.0.2.0-Documaker-Unix • RMB-V2.3.0.2.0-FW-PREREQ-MultiPlatform • RMB-V2.3.0.2.0-MicroFocus-Server5.1WP7-Install • RMB-V2.3.0.2.0-MicroFocus-Server5.1WP8-Install • RMB-V2.3.0.2.0-Oracle-Database-MultiplatForm • RMB-V2.3.0.2.0-Release-Notes • RMB-V2.3.0.2.0-Reports • RMB-V2.3.0.2.0-Self-Service • RMB-V2.3.0.2.0-TFM-Interface

Domain	Patch Number	Contents Include
Financial Services	20074954	• FW-V4.2.0.2.0-Multiplatform • RMB-V2.3.0.2.0-Documaker-Windows • RMB-V2.3.0.2.0-FW-PREREQ-MultiPlatform • RMB-V2.3.0.2.0-MicroFocus-Server5.1-Install • RMB-V2.3.0.2.0-MicroFocus-Server5.1WP7-Update • RMB-V2.3.0.2.0-MicroFocus-Server5.1WP8-Update • RMB-V2.3.0.2.0-Oracle-Database-MultiplatForm • RMB-V2.3.0.2.0-Release-Notes • RMB-V2.3.0.2.0-Reports • RMB-V2.3.0.2.0-Self-Service • RMB-V2.3.0.2.0-TFM-Interface • RMB-V2.3.0.2.0-Windows
Insurance	20074962	• FW-V4.2.0.2.0-Multiplatform • RMB-V2.3.0.2.0-Documaker-Unix • RMB-V2.3.0.2.0-FW-PREREQ-MultiPlatform • RMB-V2.3.0.2.0-Linux • RMB-V2.3.0.2.0-MicroFocus-Server5.1WP7-Install • RMB-V2.3.0.2.0-MicroFocus-Server5.1WP8-Install • RMB-V2.3.0.2.0-Oracle-Database-MultiplatForm • RMB-V2.3.0.2.0-Release-Notes • RMB-V2.3.0.2.0-Reports • RMB-V2.3.0.2.0-Self-Service
Insurance	20074984	• FW-V4.2.0.2.0-Multiplatform • RMB-V2.3.0.2.0-AIX • RMB-V2.3.0.2.0-Documaker-Unix • RMB-V2.3.0.2.0-FW-PREREQ-MultiPlatform • RMB-V2.3.0.2.0-MicroFocus-Server5.1WP7-Install • RMB-V2.3.0.2.0-MicroFocus-Server5.1WP8-Install • RMB-V2.3.0.2.0-Oracle-Database-MultiplatForm • RMB-V2.3.0.2.0-Release-Notes • RMB-V2.3.0.2.0-Reports • RMB-V2.3.0.2.0-Self-Service

Domain	Patch Number	Contents Include
Insurance	20074969	• FW-V4.2.0.2.0-Multiplatform • RMB-V2.3.0.2.0-Documaker-Windows • RMB-V2.3.0.2.0-FW-PREREQ-MultiPlatform • RMB-V2.3.0.2.0-MicroFocus-Server5.1-Install • RMB-V2.3.0.2.0-MicroFocus-Server5.1WP7-Update • RMB-V2.3.0.2.0-MicroFocus-Server5.1WP8-Update • RMB-V2.3.0.2.0-Oracle-Database-MultiplatForm • RMB-V2.3.0.2.0-Release-Notes • RMB-V2.3.0.2.0-Reports • RMB-V2.3.0.2.0-Self-Service • RMB-V2.3.0.2.0-Windows