

Oracle® Report Manager

User Guide

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Oracle Report Manager User Guide, Release 11i

Part No. A85322-01

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Send Us Your Comments

Oracle Report Manager User Guide, Release 11*i*

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- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
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If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

This user guide includes the following information you will need to work effectively with Oracle Report Manager:

- Overview and reference information
- Specific user tasks
- How to use Report Manager
- Report Manager functions and features
- Answers to frequently asked questions (FAQs)

This preface explains how the user guide is organized, and introduces other sources of information that can help you.

Report Manager is an integral part of Oracle Applications, allowing you to publish point-in-time reports to a database. You can access these reports through your Home Page using Oracle Self Service Web Applications, or through the Business Intelligence System. In addition, you can use Report Manager to manage documents, reports, and web pages you have published to the database. Report Manager allows you to set security rules to restrict user access to this content.

Report Manager works with the Oracle RDBMS version 8.0.4 or higher (7.1.5 for Open VMS), and any Release 11.5.3 of Oracle Applications or higher.

Intended Audience

This guide assumes you have a working knowledge of the principles and customary practices of your business area. It also assumes you have a basic understanding of accounting, your organization's accounting process, and the flow of transactions from your organizations subledgers to the general ledger.

This guide also assumes you are familiar with Oracle Report Manager. If you have never used these products, we suggest you attend one or more of the training classes available through Oracle Education. (See [Other Information Sources](#) for more information about Report Manager and Oracle Training).

How to Use this Guide

This guide is the primary source of information for Oracle Report Manager. It contains overviews, as well as task and reference information, organized to facilitate daily use. This guide includes the following chapters:

- Chapter 1: Oracle Report Manager Overview
- Chapter 2: Publishing and Uploading Reports to Report Manager
- Chapter 3: Security
- Chapter 4: Viewing Reports Through Report Manager
- Chapter 5: Approvals
- Chapter 6: Oracle Financial Analyzer and Report Manager

This guide is available online in HTML format. Many other Oracle Application user guides (Release 11*i*) are available online, in both HTML and Adobe Acrobat format.

The HTML version of this book is optimized for onscreen reading and lets you follow hypertext links for easy access to books across our entire library. You can also search for words and phrases if your national language is supported by Oracle's Information Navigator. The HTML documentation is available from the Report Manager and Request Center toolbars, or from a URL provided by your system administrator. Note that the HTML documentation is translated into over twenty languages.

The same information is also available when you run General Ledger or Oracle Assets. Within General Ledger or Oracle Assets, you access help from the Oracle Applications toolbar

For other Oracle Applications, you can order an Oracle Applications Documentation Library CD (Release 11i) containing Adobe Acrobat versions of each manual in the Oracle Applications documentation set. Using this CD, you can search for information, read it onscreen, and print individual pages, sections, or entire books. When you print from Adobe Acrobat, the resulting printouts look just like pages from an Oracle Applications hardcopy manual.

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Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at:
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Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of Report Manager.

Report Manager Tutorial

This tutorial illustrates how to publish reports to a database, manage your reports, documents, and web pages, and set security rules to govern user access. The tutorial also covers how to upload Oracle Financial Analyzer Reports.

Related User Guides

Report Manager shares business and setup information with Applications Desktop Integrator, Oracle Self Service Web Applications, and Oracle Business Intelligence System. You may want to refer to other user guides when you set up and use Report Manager.

If you do not have the printed versions of these manuals, you can access them from the Help menu, the Oracle Applications Document Library CD, or using a URL that your system administrator provides.

Oracle Applications Desktop Integrator User Guide

This guide is a complete source of information about Oracle Applications Desktop Integrator (ADI). It contains overviews as well as task and reference information, journal entry, budgeting, consolidation, publishing reports, and setting up ADI.

Oracle Applications Desktop Integrator Tutorial

This tutorial illustrates all of Oracle Applications Desktop Integrator's features for General Ledger, Oracle Assets, and the Request Center, and is available for the Vision demonstration database.

Oracle Business Intelligence User Guide

Information about Oracle Self Service Web Applications is available through online help.

Oracle Self Service Web Applications User Guide

Information about Oracle Self Service Web Applications is available through online help.

Oracle Financial Analyzer

This guide helps you analyze financial information from Oracle General Ledger and other sources. It is a powerful analysis tool that lets you pivot financial information across dimensions, and generate reports for distribution.

Installation and System Administration

Oracle Applications Desktop Integrator Installation Guide

This manual provides information you need to successfully install Oracle Applications Desktop Integrator in your specific hardware and operating system environment.

Oracle Report Manager About Document

This document provides you with information to successfully install Oracle Report Manager in your specific hardware and operating system environment. Please refer to Metalink Note: 234950.1

Oracle Applications Upgrade Manual

This manual explains how to prepare your Oracle Applications products for an upgrade. It also contains information on finishing the upgrade procedure for each product. Refer to this manual and the Oracle Applications Installation Manual when you plan to upgrade your products.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Applications Product Update Notes

This book contains a summary of each new feature added since the last Oracle Applications release, as well as information about database changes and seed data changes that may affect your operations or any custom reports you have created.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Report Manager and reach full productivity quickly. You can attend courses offered by Oracle University at any one of our many Education Centers, arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Report Manager working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

Oracle MetaLink

Oracle MetaLink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle MetaLink, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus[®], Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Oracle Report Manager Overview

1.1 Overview

Oracle Report Manager is an online repository for storing and viewing reports. Report Manager provides a secure and convenient location to access point-in-time reports published or uploaded to a database. You access secured reports through your Personal Home Page (Self Service Applications home page and Oracle Portal page). Public (non-secured) reports can also be accessed through the Report Manager Public Home Page.

Oracle Report Manager users can be either report producers or report consumers. Report producing users publish, upload, and set security for reports. Report consumers view, download, and approve reports.

Reports are published or uploaded using the Request Center. They can be unrestricted and available to all users through their personal home pages, or a variety of security models can be applied, allowing only authorized users to view entire reports or parts of reports. In addition, you can use your company logo to integrate reports displayed by Report Manager using your organization's individual style.

Report Manager:

- Provides a centralized source for point-in-time reports.
- Is accessible by anyone in your organization using a web browser.
- Organizes reports using a customizable tree structure that corresponds to user responsibilities.
- Provides two menus for accessing reports:
 - **Public:** Unrestricted access for everyone in your organization.

- **Secured:** Restricted access requiring user logon and password. Security can be set when the reports are published using the Request Center or by the System Administrator responsible for managing Report Manager.
- Offers approval requirement before making reports available for general viewing.
- Permits report availability in a future timeframe.
- Allows you to download spreadsheets or text files that are attached to the database for further analysis.
- Utilizes User to Value Security.

See Also

- [Section 2.3, "Publishing Reports to Report Manager"](#)
- [Section 2.11, "Uploading Files to Report Manager"](#)
- [Section 2.6, "Organizing Folders"](#)
- [Chapter 6, "Oracle Financial Analyzer \(OFA\) and Oracle Report Manager"](#)
- [Chapter 3, "Security"](#)

1.2 Report Types

There are four types of reports you can access through your Personal Home Page and the Report Manager Public Home Page:

- **Single Report:** A complete report for a specific time period. For example, your corporate income statement for May 2002.
- **Single Report Over Time:** A single report produced for different periods. For example, your corporate income statement for the periods April, May, and June 2002.
- **Expanded Report:** One report displayed in a variety of ways depending upon a report hierarchy. For example, you can publish your corporate income statement for May 2002 based on department.
- **Expanded Report Over Time:** An expanded report available for different time periods.

Note: You define expanded reports using **Content Sets** in the Oracle Applications Desktop Integrator Report Wizard or General Ledger Financial Statement Generator. Expansion values refer to different report views in Report Manager built by reports generated with content sets.

See Also

- The Report Wizard, *Oracle Applications Desktop Integrator User's Guide*
- Financial Statement Generator, *Oracle General Ledger User Guide*
- [Section 2.3, "Publishing Reports to Report Manager"](#)
- [Section 2.11, "Uploading Files to Report Manager"](#)
- [Section 2.6, "Organizing Folders"](#)
- [Chapter 6, "Oracle Financial Analyzer \(OFA\) and Oracle Report Manager"](#)
- [Chapter 3, "Security"](#)

Publishing and Uploading Reports to Report Manager

This chapter is an excerpt from the Oracle Applications Desktop Integrator User Guide. The chapter covers the following topics:

- [Section 2.1, "Overview"](#)
- [Section 2.2, "Reports"](#)
- [Section 2.3, "Publishing Reports to Report Manager"](#)
- [Section 2.4, "Publishing Existing Reports"](#)
- [Section 2.5, "Canceling Requests"](#)
- [Section 2.6, "Organizing Folders"](#)
- [Section 2.7, "Adding Menu Entries"](#)
- [Section 2.8, "Removing Menu Entries"](#)
- [Section 2.9, "Adding Folders"](#)
- [Section 2.10, "Removing Folders"](#)
- [Section 2.11, "Uploading Files to Report Manager"](#)
- [Section 2.12, "Upload Errors"](#)
- [Section 2.13, "Upload Guidelines and Troubleshooting"](#)

2.1 Overview

Reports are published to Report Manager using the Request Center in Oracle Applications Desktop Integrator, and are accessed through your Personal Home

Page or Public Home Page. This includes reports using themes and other formatting techniques unique to the Request Center. In addition, you can use the Request Center to upload non-Oracle Application reports to Report Manager.

You can create database document libraries, containing point-in-time reports, web pages, and attachments, all accessible with a standard web browser.

Use the Request Center to:

- Publish reports to Report Manager.
- Designate previewers to approve reports before they are made public.
- Schedule when reports can be published to the database.
- Apply security rules to control who can view reports.
- Attach spreadsheet and printable copies to HTML reports.
- Manage reports and documents located in the public and secured areas of Report Manager.
- Upload non-Oracle Applications reports (for example, xls, pdf, third party reports).

2.2 Reports

You can submit the following reports by selecting **Submit** from the Request Center toolbar:

- **Standard (Fixed Format):** You can submit any of the standard Oracle Applications reports available to your responsibility.
- **Standard (Variable Format):** You can submit any standard (variable format) report for Oracle Assets if your responsibility allows.
- **Financial Statement:** You can submit any financial statement reports (FSG) that have been defined, if your responsibility allows you to access the reports.
- **Ad Hoc:** You can define and submit an ad hoc report.
- **Report and Request Sets:** Defined and submitted by Oracle General Ledger or Oracle Assets, you can apply formatting and publishing options to each report in a set of reports you need to run frequently. Save the formatting and publishing options in a template for future use.
- **RXi Reports:** You can submit RXi reports with attribute sets and publishing options defined in Oracle Applications.

2.3 Publishing Reports to Report Manager

Use this procedure to submit and publish reports to Oracle Report Manager.

Prerequisites

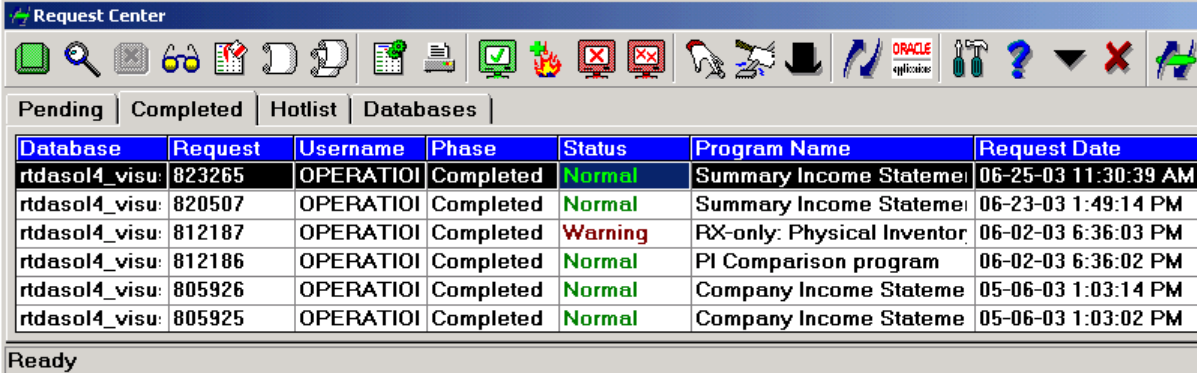
The profile option FRM: Report Manager Privileges must be enabled. See Metalink Note 234950.1: *Report Manager*.

Navigation

Oracle ADI > Request Center

Steps

1. Activate the Request Center.



The screenshot shows the Oracle Request Center window. The title bar reads "Request Center". Below the title bar is a toolbar with various icons including a green square, a magnifying glass, a printer, a document, a checkmark, a fire icon, a red X, a hand, a mouse, a downward arrow, an Oracle logo, a question mark, and a red X. Below the toolbar are tabs for "Pending", "Completed", "Hotlist", and "Databases". The main area contains a table with the following data:

Database	Request	Username	Phase	Status	Program Name	Request Date
rtdasol4_visu:	823265	OPERATIOI	Completed	Normal	Summary Income Stateme	06-25-03 11:30:39 AM
rtdasol4_visu:	820507	OPERATIOI	Completed	Normal	Summary Income Stateme	06-23-03 1:49:14 PM
rtdasol4_visu:	812187	OPERATIOI	Completed	Warning	RX-only: Physical Inventor	06-02-03 6:36:03 PM
rtdasol4_visu:	812186	OPERATIOI	Completed	Normal	PI Comparison program	06-02-03 6:36:02 PM
rtdasol4_visu:	805926	OPERATIOI	Completed	Normal	Company Income Stateme	05-06-03 1:03:14 PM
rtdasol4_visu:	805925	OPERATIOI	Completed	Normal	Company Income Stateme	05-06-03 1:03:02 PM

At the bottom of the window, the status bar reads "Ready".

2. Click **Submit Report** (the first icon, a plain green button). The Report Submission and Publishing window appears.
3. Select a report type.
4. Select **Submission**.
5. Select a report. You may need to enter parameters for the report.
6. Select **Publishing**.
7. Select a theme to apply to your report.



To format your report output, you can apply themes to any report request submitted through the Request Center. You create new themes or customize existing themes in a spreadsheet environment using a combination of

Oracle Applications Desktop Integrator and Excel formatting features. You can define fonts, font styles, and sizes, report backgrounds and colors, or add a corporate logo to your report.

You can fine-tune your themes by using tokens and cell level formatting to control the appearance of your report output down to the cell level.

See the *Oracle Applications Desktop Integrator User Guide* for more information.

8. Select **Report Manager Web Page** as the output type.
9. In the Report Manager Web Page Options region, complete the following:
Publish To: Click the flashlight (**Find**) icon to open the Publish To window. Use this window to place your report into any existing Responsibility menu structure or to create a new one.

Using the radio buttons, choose whether you want this report accessible to a Secured or Public audience.

The Publish To window is a subset of the Organize Folders window. It includes the following options: Add Menu Entry, Add Folder, and Reset. See [Section 2.6, "Organizing Folders"](#) for more information.

Timeframe: Click the flashlight (**Find**) icon to open the Select Timeframe window. Select a publishing timeframe from the List of Values. Options are all calendars defined in your implementation of Oracle General Ledger.

Suggestion: You can use the timeframe to distinguish between a series of revised reports that have the same name.

Value Security: Click the flashlight (**Find**) icon to open the Value Security window. Select a security model. This field is available only if you are publishing an FSG report and you chose Secured in the Organize Folders window. See [Chapter 3, "Security"](#) for more information.

Availability: Click the flashlight (**Find**) icon to open the Select Availability window. Using the radio buttons, choose from one of the following to specify when the report will be released:

- Now
- On Hold
- Specified Date and Time. Complete the date and time fields to designate a specific time and date.

Previewer: Click the flashlight (**Find**) icon to open the Select Previewer window. Select one or more previewers from the list of values. Previewer can only be used in conjunction with the On Hold Availability. Select the boxes if you want a spreadsheet or printable copy attached to your report.

10. Select **Options** to define your Submission and Publishing options.

When you submit a report for processing, you can set the Oracle Applications request submission options. You can schedule the report to be processed at a specific time on a specific date. You can also choose to print your report to a local or network printer, and you can specify the number of copies to print.

See the *Oracle Applications Desktop Integrator User Guide* for more information.

11. Click **OK** to submit your report.

2.4 Publishing Existing Reports

Use this procedure to publish an existing report to Oracle Report Manager.

Prerequisites

The profile option FRM: Report Manager Privileges must be enabled. See Metalink Note 234950.1: *Report Manager*.

Navigation

Oracle ADI > Request Center

Steps

1. Activate the Request Center.
2. Select the report you want to publish from the Completed tab.
3. Click **Publish Report**. The Report Output window appears.
4. Select **Report Manager Web Page** in the Output Type region.
5. In the Report Manager Web Page Options region, complete the following:

Publish To: Click the flashlight (**Find**) icon to open the Publish To window. Use this window to place your report into any existing menu structure or create a new one. Choose whether this report will be accessible to a public or secured audience.



Timeframe: Click the flashlight (**Find**) icon to open the Timeframe window. Select a publishing time frame from the List of Values. Options are all calendars defined in your Oracle General Ledger.

Suggestion: You can use the timeframe to distinguish between a series of revised reports that have the same name.

Value Security: Click the flashlight (**Find**) icon to open the Value Security window. Select a security model. This field is available only if you are publishing an FSG report and you chose Secured in the Organize Folders window. See [Chapter 3, "Security"](#) for more information.

Availability: Click the flashlight (**Find**) icon to open the Availability window. Choose from one of the following to specify when your report will be released.

- Now
- On Hold
- Complete the date and time fields to designate a specific time and date.

Previewer: Click the flashlight (**Find**) icon to open the Previewer window. Select one or more previewers. Previewer can only be used in conjunction with the On Hold Availability.

6. Select the check boxes if you want a spreadsheet or printable copy attached to your report.
7. Click **OK** to publish your report.

See Also

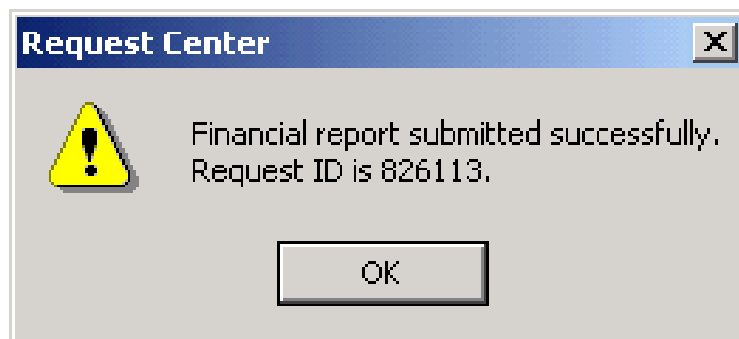
- [Chapter 3, "Security"](#)
- [Section 5.1, "Previewing and Approving Reports"](#)
- The Request Center, *Applications Desktop Integrator User's Guide*

2.5 Canceling Requests

You can cancel pending requests or requests that are still running from the Request Center.

You can cancel any request you submit under your responsibility. Users with a **system administrator** responsibility can cancel any pending request.

Note: When you submit a report or request sets, a request ID is created for each report processed in the set. You cannot cancel request sets, only individual reports that have a request id.



Steps

1. In the Pending tab, select a request.
2. Click the **Cancel Request** icon from the Request Center toolbar. A confirmation message is displayed.
3. Click **Yes** to cancel the request.
4. Choose the **Completed** tab. Note that the canceled request is displayed with a status of either *Canceled* or *Terminated*. The canceled status indicates that the request was still pending at the time it was canceled. The terminated status indicates that the request was already running at the time it was canceled.



2.6 Organizing Folders

You organize folders to manage the Report Manager menu structure. Use the Organize Folders window to:

- Designate where your documents, files, and folders are located in the menu structure.
- Create new menu entries within the Responsibility menu structure.
- Move documents, files, folders, and menu entries.

- Remove documents, files, folders, and menu entries from view (disable viewing access to these items).

Prerequisites

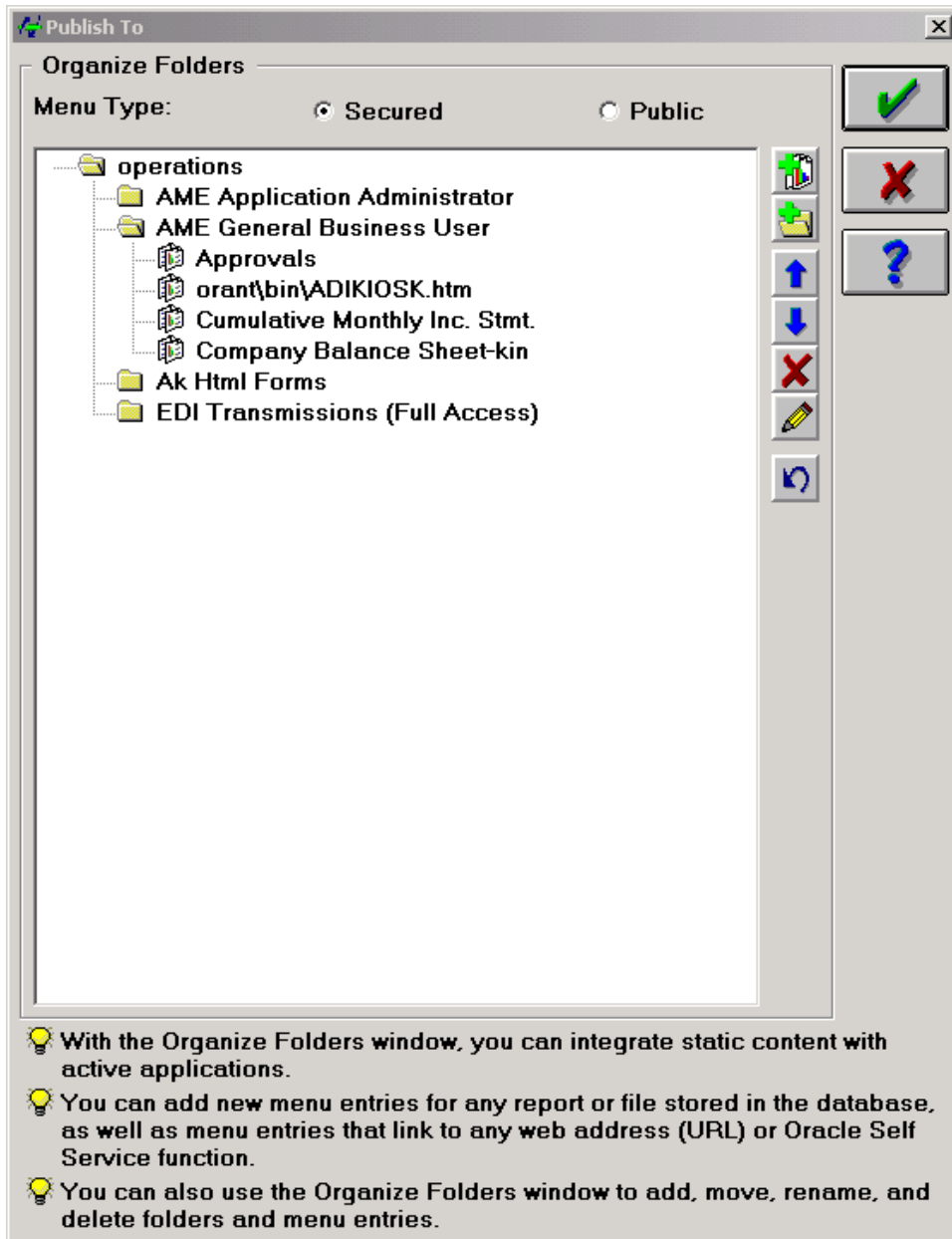
The profile option FRM: Report Manager Privileges must be enabled. See Metalink Note 234950.1: *Report Manager*.

Navigation

Oracle ADI > Request Center

Steps

1. Open the Request Center.
2. Click the **Report Manager Tools** icon from the toolbar. The Report Manager Tools window opens.
3. Click **Organize Folders**. The Organize Folders window appears.



4. Select a menu type to edit.

Secured: Displays the menu structure governed by security rules. Provides access to reports published here through the Personal Home Page.

Public: Displays the menu structure accessible to all viewers. Allows you to view reports published here through the Report Manager Public Home Page.

5. Expand and contract the menu structure as needed by double-clicking any menu folder.
6. Use the buttons listed in the following table to modify reports and folders.

Note: The Organize Folders window appears with all editing options when accessed from the Report Manager window. If you access the Organize Folders window from the Report Submission and Publishing window in the Request Center, then you have three options: Add Menu Entry, Add Folder, and Reset.

Table 2-1 Organize Folders Window buttons








Button	Text Tool Tip	Description
	Move Up	Moves the selected report or folder up one level.
	Move Down	Moves the selected report or folder down one level.
	Add Menu Entry	Opens the Add Menu Entry window. If accessed from the Publish To window, you create a new menu entry where your report is published. If accessed from the Organize Folders window, insert a URL or an existing function into the menu structure.
	Add Folder	Inserts a new folder or attaches an existing folder to the menu structure. Selecting this button opens the Add Folder window.

Table 2–1 Organize Folders Window buttons

Button	Text Tool Tip	Description
	Remove Menu Entry	Removes the selected report or folder from the menu structure.
	Rename Menu Entry	Used to edit the selected menu entry title.
	Reset Menu	Cancels any changes and restores the menu structure to the last saved structure.

The Organize Folders window graphically displays your Responsibility menu structure before committing changes to the database. In addition, the Organize Folders window enforces security defined by responsibility and profile option.

7. Click the check mark icon (**OK**) to save your work.

2.7 Adding Menu Entries

Use the Add a Menu Entry feature to insert documents, reports, web pages, and web addresses in the Responsibility menu structure.

Prerequisites

- The profile option *FRM: Report Manager Privileges* must be enabled.
- You must have system administrator responsibility to add new menu entries or folders by attaching existing folders and functions

Navigation

Oracle ADI > Request Center

Steps

1. Open the Request Center.

2. Click the **Report Manager Tools** icon from the toolbar. The Report Manager Tools window opens.
3. Click **Organize Folders**. The Organize Folders window appears.
4. Click **Add Menu Entry**. The Add Menu Entry window opens.
5. Enter the Menu Entry type:
 - **Function:** Choose a function from the drop-down list, or use the Find button to search for a function.
 - **URL:** Enter a URL address and **unique** title.
 - **OFA Document:** Choose an OFA (Oracle Financial Analyzer) report from the drop-down list. You will be prompted to log on to OFA if you have not already done so.
6. Click **OK** to save your work.

Caution: You cannot place copies of a file with the **same** file name in multiple folders. You can place copies of the same file with **different** file names in multiple folders.

2.8 Removing Menu Entries

You can remove menu entries, but they are not permanently deleted. To restore a menu and any reports attached to it, see your System Administrator.

Prerequisites

- The profile option *FRM: Report Manager Privileges* must be enabled.

Navigation

Oracle ADI > Request Center

Steps

1. Open the Request Center.
2. Click the **Report Manager Tools** icon from the toolbar. The Report Manager Tools window opens.
3. Click **Organize Folders**. The Organize Folders window appears.
4. Select a menu entry.

5. Click **Remove Menu Entry**.

Note: Removing a menu entry removes all reports attached to it.

6. Click **OK** to save your work.

2.9 Adding Folders

If the folder you are adding is a Responsibility level folder, you **must** assign user access to the folder. See [Chapter 3, "Security"](#) for details.

Prerequisites

- The profile option *FRM: Report Manager Privileges* must be enabled.
- You must have system administrator responsibility to add new menu entries or folders by attaching existing folders and functions

Navigation

Oracle ADI > Request Center

Steps

1. Open the Request Center.
2. Click the **Report Manager Tools** icon from the toolbar. The Report Manager Tools window opens.
3. Click **Organize Folders**. The Organize Folders window appears.
4. Click **Add Folder**. The Add Folder window opens.
5. Select the Folder type:
 - **New:** Enter a folder title to create a new folder. Use the Access for New Folder window to assign user access to the folder.
 - **Existing:** Use the **Find** button to search for a folder or choose an existing folder from the drop-down list. You can enter a reduction value to limit the choices displayed.
6. Click **OK** to save your work.

2.10 Removing Folders

You can remove responsibility folders, but they are not permanently deleted. To restore a responsibility and any folders/reports attached to it, see your System Administrator.

Prerequisites

- The profile option *FRM: Report Manager Privileges* must be enabled.

Navigation

Oracle ADI > Request Center

Steps

1. Open the Request Center.
2. Click the **Report Manager Tools** icon from the toolbar. The Report Manager Tools window opens.
3. Click **Organize Folders**. The Organize Folders window appears.
4. Select a folder.
5. Click **Remove Menu Entry**.

Note: Removing a responsibility folder removes all folders and reports attached to it.

6. Click **OK** to save your work.

2.11 Uploading Files to Report Manager

In addition to publishing reports to Report Manager, you can upload files to be used by Report Manager. A validation process checks for duplicates and provides a view, add, or replace mechanism to help manage uploads. Upload options are:

- Web pages and sites
- Business documents
- Image files
- A specified home page for public and secured access

Prerequisites

The profile option FRM: Report Manager Privileges must be enabled.

Navigation

Oracle ADI > Request Center

Steps

1. Open the Request Center.
2. Click the **Report Manager Tools** icon from the toolbar. The Report Manager Tools window appears.
3. Click **Upload Files**. The Upload to Database window appears.
4. Specify a file to upload. Use the flashlight (**Find**) icon to search your directories.
5. Select one of the following to use the specified file as:
 - Report Manager Logo: Uploads an image file as the logo for Report Manager. Choose any GIF or JPG file for your logo.
 - Report Manager Public Home Page: Uploads an HTML file to the Public Home Page (Public Access).
 - Report Manager Secured Home Page: Uploads an HTML file to the Personal Home Page (Secured Access).
6. Click the check mark icon (**OK**) to initiate the upload process. You receive a message confirming the success of your upload.
7. Click **Organize Folders**. The Organize Folders window appears.
8. Select a folder in which to place the uploaded report.
9. Click the **Add Menu Entry** icon.
10. Select **Function**.
11. Click the flashlight (**Find**) icon and select the report you uploaded.
12. Click the check mark icon (**OK**). Your report is now attached to the folder you selected.

See Also

- [Section 2.12, "Upload Errors"](#)
- [Section 2.13, "Upload Guidelines and Troubleshooting"](#)

2.12 Upload Errors

If the upload process encounters a validation error, the Duplicate Files window appears. This window displays two regions:

- **Files to Upload:** Displays the files you are uploading that may be duplicated in the database.
- **Duplicates in the Database:** Displays the potential duplicate files in the database for each file you are uploading.

Select any file in the **Files to Upload** region. System detected duplicates in the database are listed in the Duplicates in the Database region.

To view the contents of a file, select the file and double-click, or click **View** to launch the viewer.

To resolve duplicate errors:

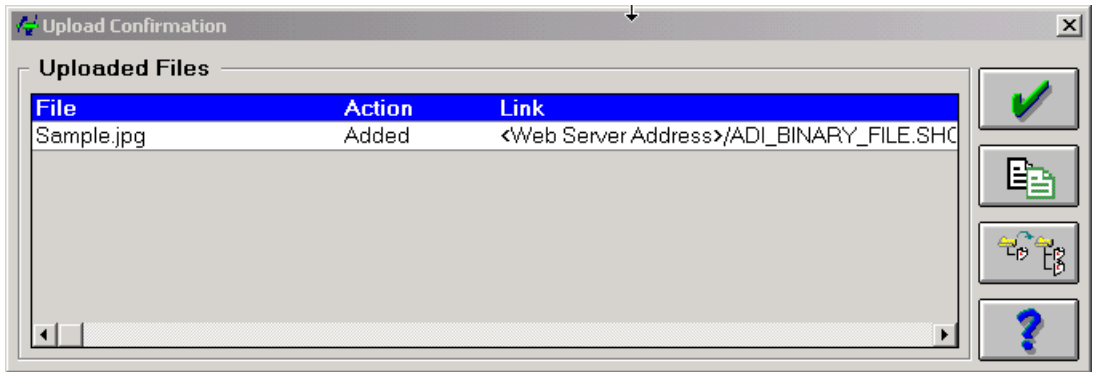
Steps

1. Select a file and choose one of the following radio buttons in the Files to Upload region:
 - **Add:** Adds the selected file to the database.
 - **Replace:** Replaces one of the files in the Duplicates in the Database region with your selected file in the File to Upload region.
2. Choose one of the listed duplicate versions to be replaced.

The file you are replacing appears in the Files to Upload region under the Replaced Version column.

You **must** resolve **all** duplicate error listings in this window for the upload process to proceed.

3. Click **OK** to upload.



When the upload process concludes, a confirmation message displays all files uploaded to the database and the URL link to call the files.

Use the **Copy** button to copy the URL links to your clipboard. You can then paste the URLs into documents, web addresses, and so on.

2.13 Upload Guidelines and Troubleshooting

Please review the following guidelines for file uploads:

- Links in an HTML File

Absolute links: links in the web page that point to web pages stored across the internet, are **not** uploaded to the database.

Relative links: links in the web page that point to other web pages stored in the local site, are uploaded to the database.

- Image Files

An image file is uploaded only if a duplicate does not exist in the database. Duplicate image files share the same file name, file size, and binary objects.

- Ancillary Files

Ancillary files are uploaded directly to the database if a duplicate is not detected. Duplicate ancillary files share the same file name.

If a duplicate is found with the same file size, a binary comparison is performed. If the files have the same binary objects, then the ancillary document is not uploaded.

The decision window opens when:

- The ancillary files share the same file name but not the same file size. You are asked if you want to replace the existing file in the database or add a new file.
- The ancillary files share the same file name but not the same binary objects. A comparison of binary objects is performed. If the files do not contain the same binary objects, then you are asked if you want to replace the existing file or add a new one.
- HTML Files

HTML files are uploaded directly to the database if a duplicate is not detected. Duplicate HTML files share the same file name.

If a duplicate is found with the same file size, a binary comparison is performed. If the fields have the same binary objects, then the HTML file is not uploaded.

The decision window opens when:

- The HTML files share the same file name but not the same file size. You are asked whether you want to retain the existing file in the database or overwrite (replace) the existing file in the database.
- The HTML files share the same file name but not the same binary objects. A comparison of binary objects is performed. If the files do not contain the same binary objects, then you are asked if you want to retain the existing file in the database or overwrite it.

An HTML page can contain all of the previous file types, including links, images, and ancillary files. The validation process checks all of the subcomponents before validating the HTML page. After the HTML page uploads successfully a confirmation lists all the files that were uploaded.

This chapter covers the following topics:

- [Section 3.1, "Overview"](#)
- [Section 3.2, "Flexfield Value Security"](#)
- [Section 3.3, "Setting Up Users to Value Security"](#)
- [Section 3.4, "PL/SQL Based Security"](#)

3.1 Overview

Report Manager security functions on two levels:

- **Level 1:** When you create folders using the Organize Folders window, you assign user access to that folder. Users must be granted access to a folder in order to see its contents.
- **Level 2:** The security models (listed below) add another layer of security on top of user access to folders. Although users have access to a variety of folders, their applications responsibility can restrict access to specific folders. Similarly, Flexfield Value Security, User to Value Security, and PL/SQL Security can be applied to fine tune user access to folders.

Caution: You cannot change user access to folders once a folder has been created. Contact your System Administrator.

You can choose from the following four security models to control content of reports published to the database:

- **None:** Individual security (responsibility) within Oracle Applications is extended to Report Manager. Individual user access to reports is determined by their assigned responsibility.
- **Flexfield Value Security:** Standard applications flexfield value security is attached to a responsibility and applied to the user who is publishing and viewing financial reports.
- **User to Value Security:** Custom security can be defined in Oracle Report Manager to control access to secured financial reports.
- **PL/SQL Based Security:** allows you to apply proprietary security developed for your organization to Oracle Report Manager.

These security models and their customization options are explained further in this chapter.

3.2 Flexfield Value Security

This security model extends Oracle Applications flexfield value security to financial reports published by the Request Center and viewed through Oracle Report Manager. You can publish and view reports only by value sets to which you have access.

Flexfield Security must be defined in Oracle Applications and attached to the responsibility you are using and to the folder to which you are publishing your reports. Details on setting up Flexfield Value Security can be found in the *Oracle Applications Flexfields User's Guide*.

For example, if you publish a summary income statement for departments 100 to 120 and you only have access to departments 100 through 110, your report will produce a summary income statement for departments 100 to 110. The log file produced by the Request Center will indicate you did not have the authority to publish an income statement for departments 111 to 120.

If users are restricted to department 100 to 105, then they can only view information in reports for departments 100 to 105 in Oracle Report Manager.

Note: Flexfield Value Security is only applied to one value set. Continuing the above example, a user is restricted in Oracle Application to accessing information for department 100 to 105 and account 1000 to 2000. Since the published report is restricted by a department value set, the user can only see department 100 to 105. However, the accounts in the report are unrestricted. Even though the user is restricted from viewing accounts 1000 to 2000 in Oracle Applications, publishing the report is governed by the department value set and the user can see all accounts displayed in the report

Prerequisites

- Your report is a Financial report
- Your report is submitted with a content set
- Exactly one segment value in the content set has a display type of **PE (Page/Expand)**
- You selected Secured in the Organize Folders window

See Also

- *Oracle Applications System Administrator's Guide*
- *Oracle Applications Flexfields User Guide*

3.3 Setting Up Users to Value Security

Users to Value Security allows you to define a security model for Oracle Report Manager based on segment values for financial reports published into the database. When you access Oracle Report Manager, you can view reports based on a segment value, and framed by a security model set for you.

To create a Users to Value Security model, you must select participating value sets then assign user privileges to values within the value sets.

See the *Oracle Report Manager About document*, Metalink Note number 234950.1.

Within your responsibility, you have access to the following:

- Participating Value Sets
- Users to Value Security

- Values to User Security
- Security Listing Report

Example

You create a financial report for travel expenses in General Ledger or the Oracle Applications Desktop Integrator Report Wizard with a content set for the Department segment (departments 850 to 899). The display type in the content set must be set to *PE (Page/Expand)*, producing a travel expense report for each department.

You use the Request Center to publish this report to Oracle Report Manager. The Report Submission and Publishing window in the Request Center lets you assign a User to Value Security model selected from the Value Security window. If your security model provides access to departments 870 to 885, you can only view travel expense reports for departments 870 to 885, even though travel expense reports for all departments are in the database.

Prerequisites

- Your report is a Financial report.
- Your report is submitted with a content set.
- Exactly one segment value in the content set has a display type of PE (Page/Expand).
- You selected Secured in the Organize Folders window.
- To have access to all values in the value set, the System Administrator must enable the profile option, FRM: User Owner Access, for you. This profile must be enabled or some of the following tasks will not work properly.

3.3.1 Selecting Value Sets to participate in a User to Value Security Model

Use this procedure to select value sets to participate in a User to Value Security Model

Login

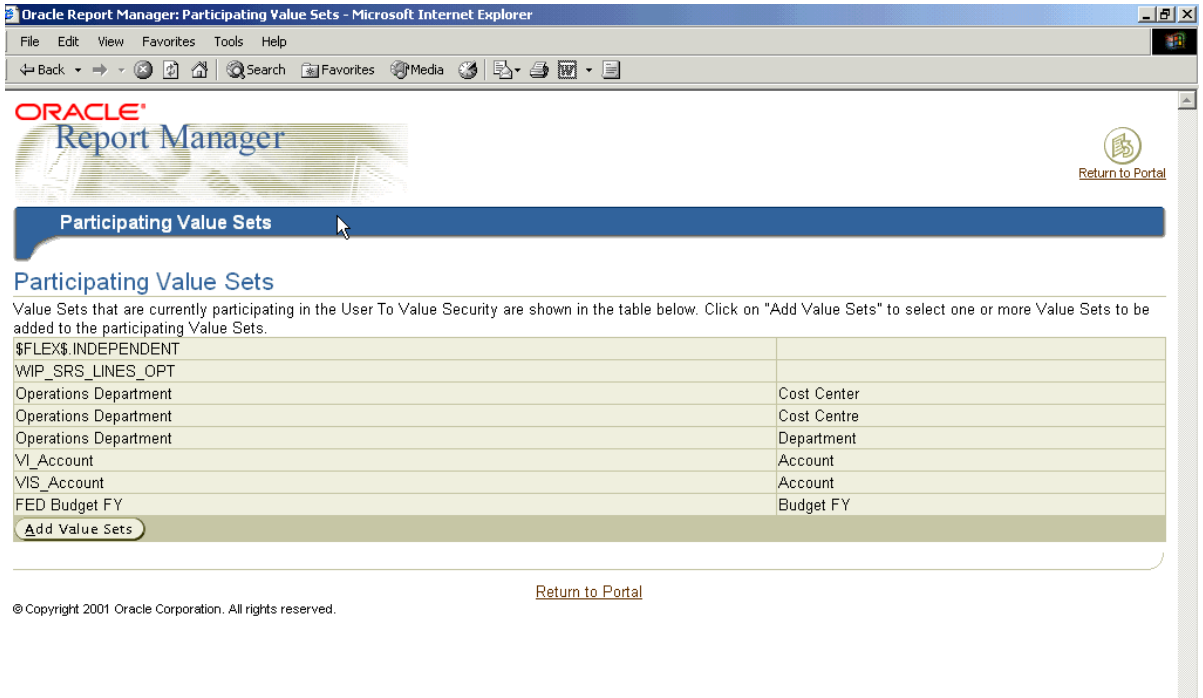
Oracle Applications Login

Responsibility

Report Manager

Steps

1. Log on to Oracle Applications with your user name and password.
2. Select the Report Manager responsibility.
3. Select **Participating Value Sets**. The Participating Value Sets page appears, listing the Value Sets you have assigned to a User to Value Security Model.



Oracle Report Manager: Participating Value Sets - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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ORACLE®
Report Manager

Return to Portal

Participating Value Sets

Participating Value Sets

Value Sets that are currently participating in the User To Value Security are shown in the table below. Click on "Add Value Sets" to select one or more Value Sets to be added to the participating Value Sets.

\$FLEX\$.INDEPENDENT	
WIP_SRS_LINES_OPT	
Operations Department	Cost Center
Operations Department	Cost Centre
Operations Department	Department
VI_Account	Account
VIS_Account	Account
FED Budget FY	Budget FY

Add Value Sets

Return to Portal

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4. Select **Add Value Sets** to add Value Sets
5. Select the box corresponding to the Value Set you want to add to User to Value Security.
6. Click **Apply** to save your additions. An Expansion Value Security Set is created for all Value Sets with an enabled check box. The Participating Value Sets window appears. The value sets you selected are added to the list.

3.3.2 Assigning Users to Value Set Values

To assign users to value set values:

Login

Oracle Applications Login

Responsibility

Report Manager

Steps

1. Choose **User to Value Security**. The Select Value page appears.

The screenshot shows a web browser window titled "Oracle Report Manager: Assign Users to Value - Microsoft Internet Explorer". The browser's address bar and menu bar are visible. The main content area features the Oracle Report Manager logo and a "Return to Portal" link. A blue header bar contains the text "Assign Users to Value". Below this, the section "Select Value" is displayed, with the instruction "Select a Value Set and corresponding Value to assign to one or more Users". Two buttons, "Cancel" and "Next", are positioned to the right. The "Value Set Selection" section includes a text input field for "Value Set" and a "Select Value Set" button. The "Value Selection" section includes a text input field for "Value" and a "Select Value" button. At the bottom right of the form area, there are "Cancel" and "Next" buttons. A "Return to Portal" link is located at the bottom center of the page. The footer contains the copyright notice: "© Copyright 2001 Oracle Corporation. All rights reserved."

2. Enter a value set name or click **Select Value Set** and select the name from the list.

The screenshot shows a web browser window titled "Oracle Report Manager: Assign Values To User - Microsoft Internet Explorer". The page header includes the Oracle Report Manager logo and a "Return to Portal" link. The main content area is titled "Search and Select List of Values" and "Search and Select: Value Set Name". It features a search section with a dropdown menu set to "Name" and a text input field containing "%operations". Below the search section, the results table contains one item:

Select Name	Segment
<input type="checkbox"/> Operations Department	Cost Center

At the bottom of the page, there is a "Return to Portal" link and a copyright notice: "© Copyright 2001 Oracle Corporation. All rights reserved."

3. Enter a value or click **Select Value** and select the name from the list.

The screenshot shows the Oracle Report Manager interface in a Microsoft Internet Explorer browser window. The page title is "Oracle Report Manager: Assign Users to Value". The main heading is "Search and Select List of Values". Below this, the "Value Set" is identified as "Operations Department". The search criteria are set to "Value" with a wildcard "%". The search results show a table with 79 items, displaying the first 10 rows. The table has columns for "Select", "Value", and "Description".

Search and Select: Value

Value Set **Operations Department**

[Cancel](#) [Select](#)

Search

Select a filter item in the Search By list and enter reduction criteria in the text field, then press the Go button. To see a list of all items, clear the text field and press the Go button.

Search by Value % [Go](#)

Results

Results table contains 79 items.

Previous 1-10 of 79 Next 10

Select	Value	Description
<input type="radio"/>	100	Resources
<input type="radio"/>	000	Balance Sheet
<input type="radio"/>	110	Facilities Resources
<input type="radio"/>	120	Machine Resources
<input type="radio"/>	130	Computer Resources
<input type="radio"/>	140	Communications Resources
<input type="radio"/>	200	Other Corporate
<input type="radio"/>	400	Sales
<input type="radio"/>	410	VP Sales Office

4. Click **Next**. The Security Settings page appears.

Oracle Report Manager: Assign Users to Value - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print

ORACLE
Report Manager

Return to Portal

Assign Users to Value

Value Set **Operations Department** Value **100**

Security Settings

Values that are assigned to a selected user are displayed in the table below. Click on "Add Values" to add one or more values to the table. Set the security privileges for each value by checking the appropriate checkboxes. Back Apply

User Name ▲	Description	Owner	Contact	Viewer
aallen	Arlene Allen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
operations	Pat Stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Add Users Back Apply

Return to Portal

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5. Assign user privileges for the displayed value.
 - a. If you want to add a user, click **Add Users** and select the user.
 - b. You can assign more than one of the following privileges to a user. Only the System Administrator can assign **all** user privileges.
 - **Owner:** The assigned user is ultimately responsible for the content set or expansion value. An owner can grant or revoke contact or viewer privileges to other users and have viewer access to their expansion values.
 - **Contact:** Contacts can only grant or revoke viewer privileges to another user. Contacts have viewer access to their expansion values.
 - **Viewer:** Only allows the user to view the expansion value within a Financial report. A user with only a Viewer privilege cannot assign any privileges to other users.
6. Click **Apply**. A confirmation message appears.

3.3.3 Assigning Value Set Values to Users

Use this procedure to assign value set values to users.

Login

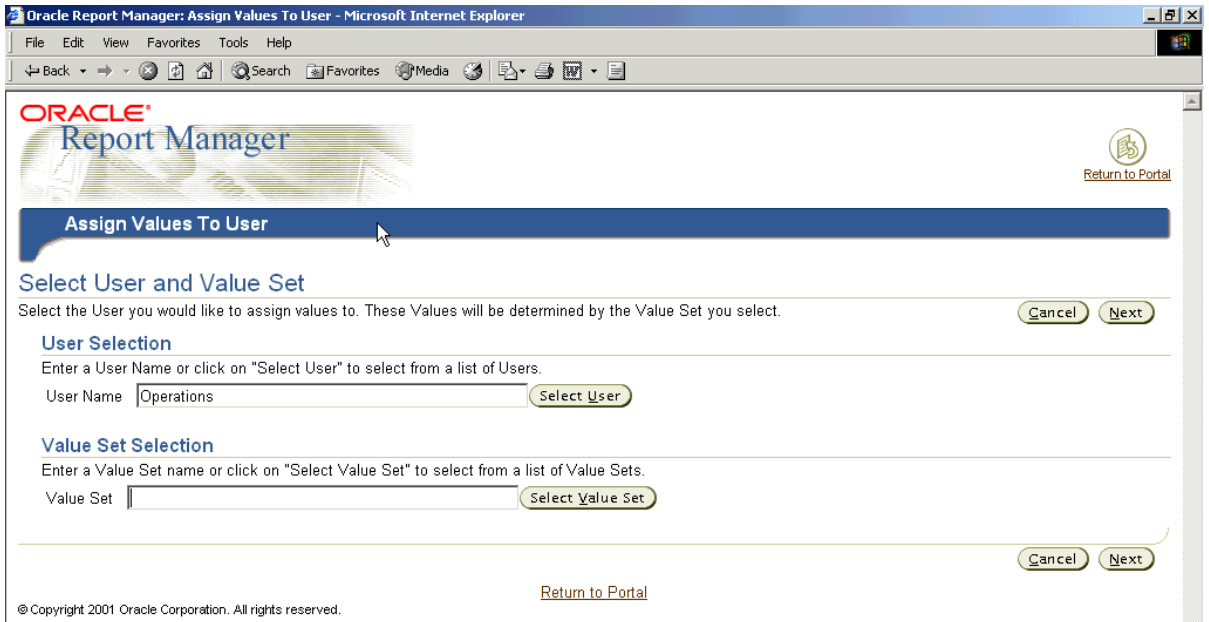
Oracle Applications Login

Responsibility

Report Manager

Steps

1. Choose **Values to User Security**. The Select User and Value Set page appears.



Oracle Report Manager: Assign Values To User - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print

ORACLE
Report Manager

Return to Portal

Assign Values To User

Select User and Value Set

Select the User you would like to assign values to. These Values will be determined by the Value Set you select. [Cancel](#) [Next](#)

User Selection

Enter a User Name or click on "Select User" to select from a list of Users.

User Name [Select User](#)

Value Set Selection

Enter a Value Set name or click on "Select Value Set" to select from a list of Value Sets.

Value Set [Select Value Set](#)

[Cancel](#) [Next](#)

[Return to Portal](#)

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2. Enter a User or click **Select User** and select the name from the list.

ORACLE® Report Manager

Search and Select List of Values

Search and Select: User

Cancel Select

Search

Select a filter item in the Search By list and enter reduction criteria in the text field, then press the Go button. To see a list of all items, clear the text field and press the Go button.

Search by User Name % Go

Results

Results table contains 990 items.

Previous 1-10 of 990 Next 10

Select	User Name ▲	Description ▲
<input type="radio"/>	111	Wireless User
<input type="radio"/>	222	Wireless User
<input type="radio"/>	4bwebb	
<input type="radio"/>	4jdaugherty	
<input type="radio"/>	4rabbott	
<input type="radio"/>	4rbrooks	
<input type="radio"/>	4rmcdonald	
<input type="radio"/>	aallen	Arlene Allen
<input type="radio"/>	aambros	Mr. Anthony Ambrose, Finance Director
<input type="radio"/>	aawang	

Previous 1-10 of 990 Next 10

Done Local intranet

3. Enter a value set or click **Select Value Set** and select the name from the list.

Oracle Report Manager: Assign Values To User - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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ORACLE
Report Manager

Return to Portal

Search and Select List of Values

Search and Select: Value Set Name

Cancel Select

Search

Select a filter item in the Search By list and enter reduction criteria in the text field, then press the Go button. To see a list of all items, clear the text field and press the Go button.

Search by Name %operations Go

Results

Results table contains 1 items.

Select	Name	Segment
<input type="radio"/>	Operations Department	Cost Center

Cancel Select

Return to Portal

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4. Click **Next**. The Security Settings page appears.

Oracle Report Manager: Assign Values To User - Microsoft Internet Explorer

ORACLE® Report Manager

Assign Values To User

User **aallen** Value Set **Operations Department**

Security Settings

Values that are assigned to a selected user are displayed in the table below. Click on "Add Values" to add one or more values to the table. Set the security privileges for each value by checking the appropriate checkboxes. [Back](#) [Apply](#)

Value ▲	Description	Owner	Contact	Viewer
000	Balance Sheet	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100	Resources	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
110	Facilities Resources	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
111	West Region Resources	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
112	East Region Resources	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
120	Machine Resources	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
130	Computer Resources	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
140	Communications Resources	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
200	Other Corporate	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
300	Non-Product Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[Add Values](#) [Back](#) [Apply](#)

[Return to Portal](#)

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5. Enable the check boxes to assign user privileges to a value. Click **Add Values** to access a series of screens for adding values that currently do not have privilege settings for the selected user.

You can also assign more than one privilege to a user. Only the System Administrator can assign all user privileges. Your ability to assign privileges is limited by your responsibility.

- **Owner:** Indicates the assigned user is ultimately responsible for the content set or expansion value. Owner can grant or revoke contact or viewer privileges to other users and have viewer access to their expansion values.
 - **Contact:** Allows users to grant or revoke viewer privileges to other user. Contacts have viewer access to their expansion values.
 - **Viewer:** Allows users to view the expansion value within a Financial report. A user with only a Viewer privilege cannot assign any privileges to other users.
6. Click **Apply** to save the security settings. Your privileges are assigned and a page appears with a confirmation message.

3.3.4 User to Value Security Listing Report

Your System Administrator can access a report detailing user security privileges. Use this report to quickly determine user access to values within participating sets.

Login

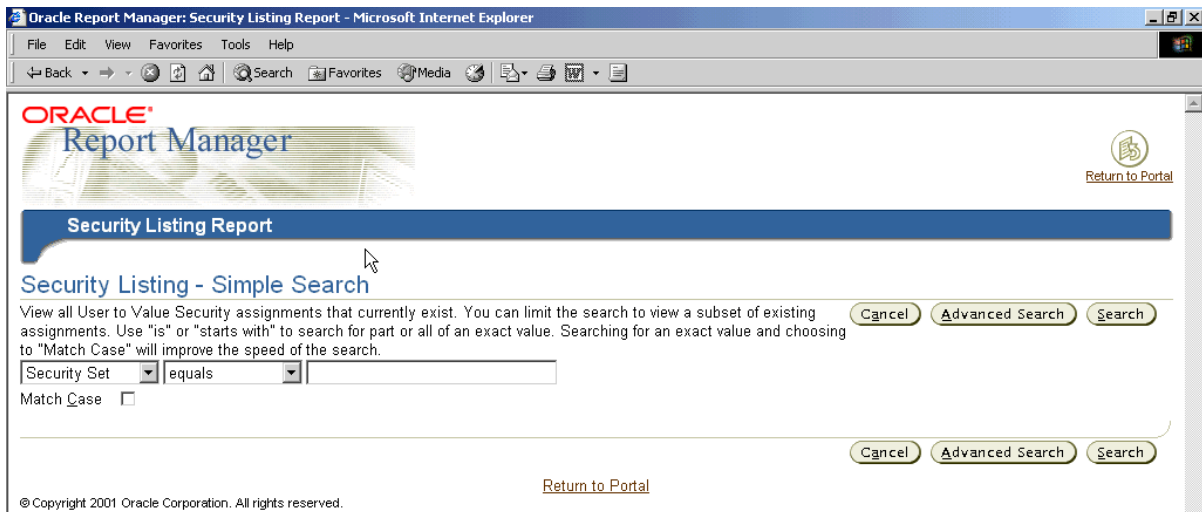
Oracle Applications Login

Responsibility

Report Manager

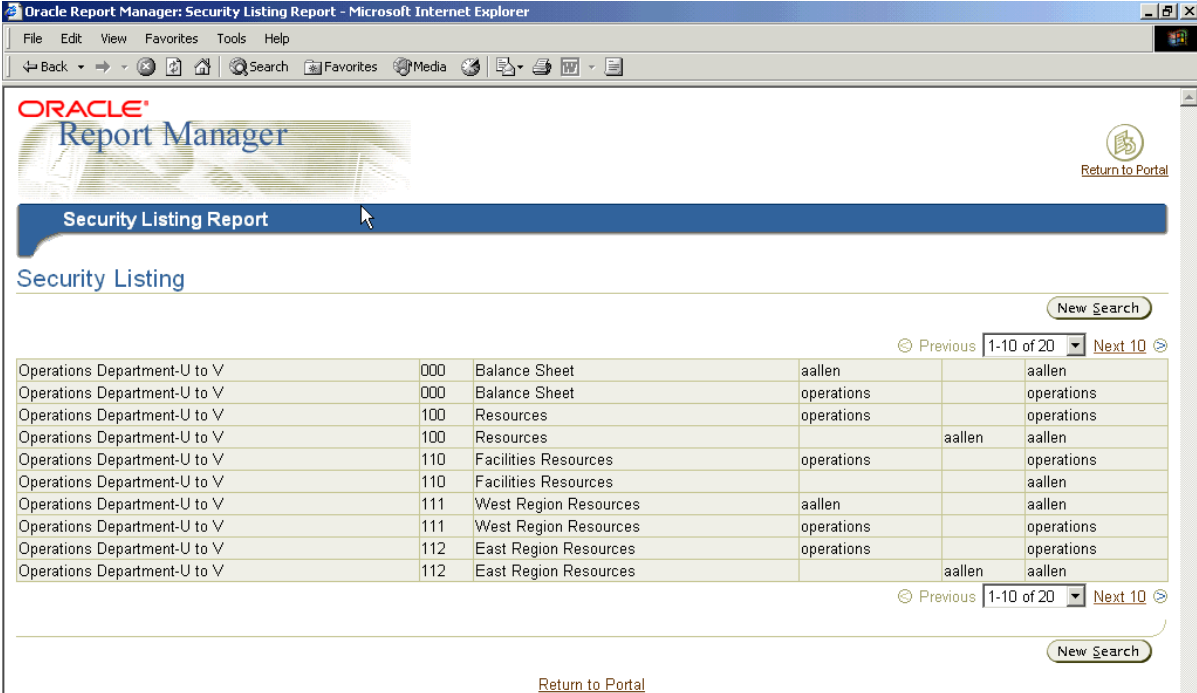
Steps

1. Choose **Security Listing Report**. The Security Listing - Simple Search page appears.



2. If you want to view all User to Value Security assignments that currently exist, then click **Search**. The report appears. Skip the remaining steps.
3. If you want to search using one criterion, then use the Simple Search page.
4. If you want to refine your search by using two or more criteria, then click **Advanced Search**. The Advanced Search page appears.
5. Enter your search criteria.

6. Click **Search**. The report appears.



Oracle Report Manager: Security Listing Report - Microsoft Internet Explorer

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Report Manager

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Security Listing Report

Security Listing

New Search

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Operations Department-U to V	000	Balance Sheet	aallen	aallen
Operations Department-U to V	000	Balance Sheet	operations	operations
Operations Department-U to V	100	Resources	operations	operations
Operations Department-U to V	100	Resources		aallen
Operations Department-U to V	110	Facilities Resources	operations	operations
Operations Department-U to V	110	Facilities Resources		aallen
Operations Department-U to V	111	West Region Resources	aallen	aallen
Operations Department-U to V	111	West Region Resources	operations	operations
Operations Department-U to V	112	East Region Resources	operations	operations
Operations Department-U to V	112	East Region Resources		aallen

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New Search

Return to Portal

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Guidelines

Following are explanations of the search fields:

Security Set: Combination of security flexfields.

Value: Values specific to a content set expanded field.

Description: Value sets included in the security set.

Owner: Owners can grant or revoke viewer privileges to other users and have Viewer access to their expansion values.

Contact: Contact can grant or revoke viewer privileges to other users. Contacts have Viewer access to their expansion values.

Viewer: Viewers cannot assign privileges to other users. Viewers have access to expansion values in a report based on privileges assigned by Owners or Contacts.

Following are descriptions of the Search Operators:

Equals: Equals the entry in the criteria field. Alpha and numeric.

Does not equal: Does not equal the entry in the criteria field. Alpha and numeric.

Like: Contains the search string entered in the criteria field. Use % wildcard where strings should exist on either side of the search string. For example: %account%. Alpha and numeric.

Not like: Does not contain the search string entered in the criteria field. Use % wildcard where strings should exist on either side of the search string. For example: %account%. Alpha and numeric.

Less than: Searches for values less than the search string entered in the criteria field. Numeric.

Less than or equal to: Searches for values less than or equal to the search string entered in the criteria field. Numeric.

Greater than: Searches for values greater than the search string entered in the criteria field. Numeric.

Greater than or equal: Searches for values greater than or equal to the search string entered in the criteria field. Numeric.

Is empty: Searches for records where no value exists for the search criteria.

Is not empty: Searches for records where a value exists for the search criteria.

3.4 PL/SQL Based Security

You can use PL/SQL Based Security to leverage proprietary security developed for your organization. PL/SQL Based Security packages govern user access to report expansion values. For more information and for definition information on PL/SQL Based Security packages, see your System Administrator.

Prerequisites

- Your report is a Financial report.
- Your report is submitted with a content set.
- Exactly one segment value in the content set has a display type of PE (Page/Expand).
- You selected **Secured** in the Organize Folders window.

Prerequisites

The profile option FRM: Report Manager Privileges must be enabled. See Metalink Note 234950.1: *Report Manager*.

Navigation

Oracle ADI > Request Center

Steps

1. Select **Submit Report** in the Request Center. The Report Submission and Publishing window appears.
2. Choose the Financial Statement report type, then select a Financial report you want to publish.
3. Select **Publishing**.
4. Apply a theme and select Database Web Page as the output type.
5. Complete the Database Web Page Options regions. In the Value Security field, select **Find**. The Value Security window appears.
6. Select PL/SQL Based Security, and enter the PL/SQL Package Name. For example, ADI_CUSTOM_SECURITY.
7. Select **OK**. The PLSQL Security Package name appears in the Value Security field.

Viewing Reports Through Report Manager

4.1 Accessing Reports

You can access Report Manager through the Public Home Page, or through your Personal Home Page. See your System Administrator for the URL and then add it to your bookmarks for convenient access.

To view reports through the Public Home Page:

Steps

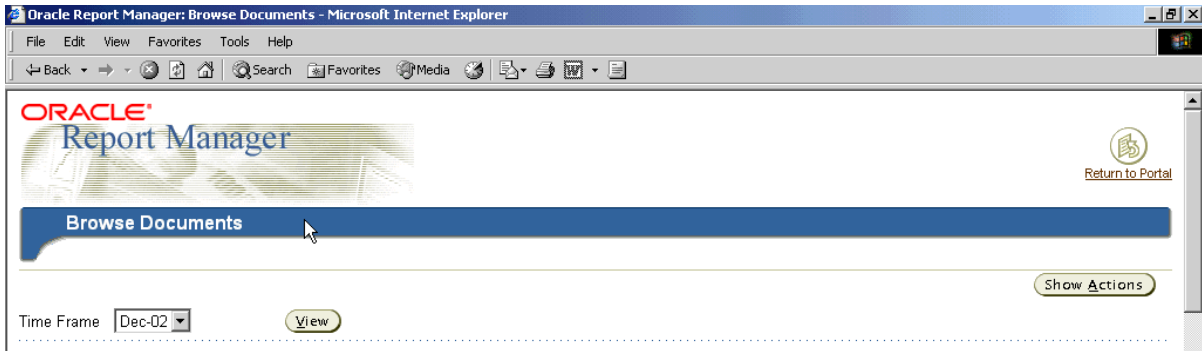
1. Navigate to the URL for the Public Home Page. The Public Home Page appears. Only the *public* reports appear in the navigation tree on the left side of the page.
2. Select a report. The report displays in the content frame.
3. If the report is a single report over time, expanded report, or expanded report over time, drop-down lists appear above the report in the content frame, allowing you to choose the time period and/or expansion value. Using the drop-down, select the Timeframe and/or Expansion Value you want to view.
4. Click **View**. The report appears.

To view reports through your Personal Home Page:

Steps

1. Navigate to your Personal Home Page.
2. The responsibilities available to you display in the Navigation frame on the left side of the page.
3. Select a Responsibility for which you have published secured reports. The reports display to the right of the Navigation frame, under the folder name where the reports were published.

4. Select a report. The report displays in the content frame.
5. If the report is a single report over time, expanded report, or expanded report over time, drop-down lists appear above the report in the content frame allowing you to choose the time period and/or expansion value. Select the Timeframe and/or Expansion Value you want to view.



6. Click **View**.

Note: Reports with a *preview* status can only be viewed by designated previewers. If you have the appropriate responsibility but are not a designated previewer, you can see the report in the report hierarchy of the navigation frames but you cannot view the contents until the report is approved for release.

See Also

- The Report Wizard, *Applications Desktop Integrator User's Guide*
- *Oracle General Ledger User's Guide*
- [Chapter 5, "Approvals"](#)

5.1 Previewing and Approving Reports

When you use the Request Center to publish a report to the database, you can designate previewers who must approve the report for release. Previewers sign on to their Personal Home Page and approve the report for immediate or later release.

Oracle Report Manager: Browse Documents - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media

ORACLE®
Report Manager

Return to Portal

Browse Documents

Hide Actions

Reviewer: Pat Stock, System administrator

Apply

Status: On Hold

Now (selected)

On: 02 July 2003 02 42

Time Frame: Dec-02 View

Retrieve Spreadsheet

Income Statement

Steps

You can **only** preview reports for which you are a designated previewer.

1. Navigate to your Personal Home Page and sign on.

2. Select a report. The report displays in the content frame. If the report is a single report over time, expanded report, or expanded report over time, pop lists appear above the report in the content frame, allowing you to choose the time period and/or expansion value.
3. Select the Timeframe and/or Expansion Value you want to view, then select **View**.
4. Select **Now** to release the report immediately.
5. From the pop list, select **Make Available**. Select a date and time to make the report available.

Guidelines

The following conditions apply when you approve specific report types:

Single Reports Over Time - If you are the designated previewer for multiple report periods, your approval is limited only to the time period you are currently previewing.

Expanded Report - If you are the designated previewer for a report that has multiple expansion values, your approval extends to all report expansion values even if your responsibility limits the complete list of expansion values you can view.

For example, a report is published to the database for cost centers 680-690. You are the designated previewer, your responsibility or security model gives you access to cost centers 684 and 685 only, your approval extends to all cost centers, 680-690 even though you only have access to 684 and 685.

Expanded Reports Over Time - If you are the designated previewer for a report that has multiple periods and expansion values, your approval extends to all expansion values, but is limited to the period you are currently reviewing.

Note: Your approval only applies to the report date displayed in the Time Frame poplist and the expansion value displayed in the Expanded Value poplist.

See Also

- [Section 2.3, "Publishing Reports to Report Manager"](#)
- [Section 2.11, "Uploading Files to Report Manager"](#)
- [Section 2.13, "Upload Guidelines and Troubleshooting"](#)
- [Section 2.6, "Organizing Folders"](#)
- [Chapter 3, "Security"](#)

- [Chapter 6, "Oracle Financial Analyzer \(OFA\) and Oracle Report Manager"](#)

Oracle Financial Analyzer (OFA) and Oracle Report Manager

6.1 Overview

Oracle Financial Analyzer (OFA) is a distributed application for financial reporting, analysis, budgeting, planning, and integrating of the central source of management data with powerful analytical tools.

Financial Analyzer provides access to General Ledger and other data sources via a range of client platforms, including the Web and spreadsheet applications.

You can upload Financial Analyzer reports into Oracle Report Manager for others to review and analyze. Financial Analyzer security rules are extended to viewers who access published reports through Oracle Report Manager.

Because OFA reports are dynamic, you only need to upload an OFA report once. OFA report content is updated as underlying data is repopulated from General Ledger.

6.2 Publishing Financial Analyzer Reports

Use the Request Center to publish your Financial Analyzer reports to the database.

Prerequisites

Create your report in Oracle Financial Analyzer.

Prerequisites

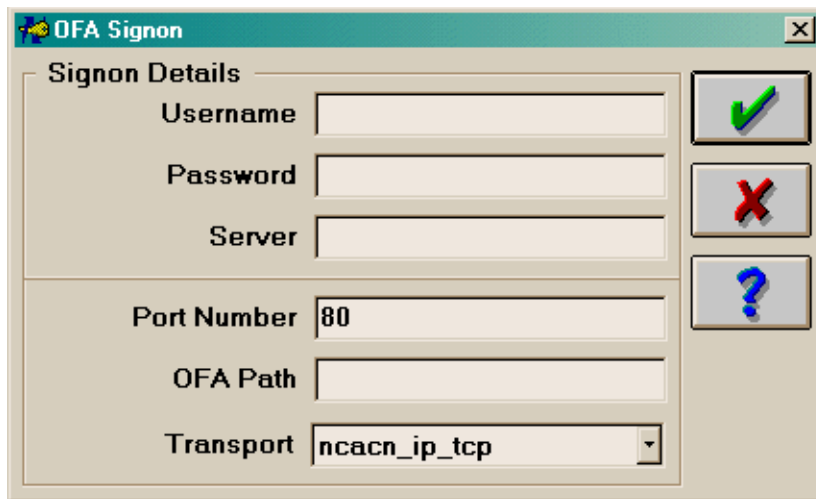
The profile option FRM: Report Manager Privileges must be enabled. See Metalink Note 234950.1: *Report Manager*.

Navigation

Oracle ADI > Request Center

Steps

1. Activate the Request Center.
2. Select **Report Manager Tools** from the toolbar. The Report Manager Tools window appears.
3. Select **Organize Folders**. The Publish To window appears.
4. Choose a folder to add your Financial Analyzer report to. Double-click the folder to expand it.
5. Select **Add Menu Entry**. The Add Menu Entry window appears.
6. Select the **OFA Document** radio button. The OFA Signon window appears.



The screenshot shows a dialog box titled "OFA Signon". It has a standard Windows-style title bar with a close button (X) in the top right corner. The main area is divided into two sections. The top section is titled "Signon Details" and contains six input fields: "Username", "Password", "Server", "Port Number" (with the value "80"), "OFA Path", and "Transport" (with a dropdown menu showing "ncacn_ip_tcp"). To the right of these fields are three vertically stacked buttons: a green checkmark, a red X, and a blue question mark.

7. Sign on to OFA with your OFA user name and password and the database connection information for the shared database.
Contact your System Administrator for database connection information.
8. Select **OK**.

9. Enter reduction criteria or choose a report from the poplist. The name of the report is automatically inserted in the **Title** field of the window. Optionally, change the title.
10. Select **OK**. Your OFA report is now attached to the folder you selected. The Publish To window appears verifying the location of your report.

Note: Request Center keeps your OFA connection open until Request Center is closed. OFA Reports can be uploaded to the database only once.

11. Select **OK** to return to the Request Center toolbar.

6.3 Viewing OFA Reports Through Report Manager

Log on to your Personal Home Page to view OFA reports uploaded to Oracle Report Manager. You will need to enter your OFA user name and password.

Steps

1. Navigate to the URL for your Personal Home Page, and sign on. Your Personal Home Page appears. Reports are listed with no distinction in report types.
2. Select the Financial Analyzer report you want to view. The Connect to Express Server window appears.
3. Enter your OFA user name and password and select **OK**. Report Manager is launched and the OFA report you selected appears. The values you can see are limited by your OFA security. This is a read-only report but you can use OFA tools to change the layout of the report, pivot dimension values, and export to Excel.

You can view other listed OFA reports without having to enter your OFA user name and password.

See Also

- *Oracle Financial Analyzer User's Guide*
- *Oracle Applications User's Guide*

Frequently Asked Questions

A.1 General Questions

What is Oracle Report Manager for 11i?

Oracle Report Manager for 11i puts the functionality of Oracle Report Manager online.

Oracle Report Manager for 11i not only puts your paper reports on the web, but also allows you to create new report templates, manage report security, and define content sets from your web browser.

Report Manager for 11i provides immediate access to all Financial (FSG), Standard, Variable Format, Third Party, and Business Intelligence System reports from a secured web portal, providing a central and secured self-service report repository that delivers information to thousands of subscribers simultaneously.

This document distribution paradigm cuts costs by eliminating shipping paper reports, allowing people in your organization to make smarter business decisions through easier and more timely information access.

What has changed in this new version of Report Manager?

Report Manager for 11i incorporates Oracle's Self Service Application framework, improving performance, reducing maintenance, and providing access to anyone with a web browser.

How does Oracle Report Manager for 11i work?

Reports are run on the Oracle Applications concurrent manager, published through Request Center, then uploaded into the report repository. The report repository resides in the same database that hosts Oracle Applications. Although not required, for greatest efficiency, Report Manager for 11i is designed to display reports on the

Oracle Self-Service Home Page, and leverages the same components as the standard applications to reduce administrative costs associated with maintaining multiple tables and rules. Oracle Report Manager for 11*i* has two users, the content provider and the report consumer. At the time of publishing, the content provider determines where on the portal the reports will display, and the type of security to be applied. Oracle Report Manager transparently deals with the underlying HTML code, and with uploading the reports to the repository. To access reports, the report consumer logs on to the respective website, where the reports are immediately available.

What type of security does Oracle Report Manager for 11*i* have?

Oracle Report Manager for 11*i* enforces existing Oracle Applications security against content providers as well as providing four levels of security against report consumers.

None: Individual security (responsibility) within Oracle Applications is extended to Report Manager for 11*i*. Individual user access to reports is determined by assigned responsibility.

Flexfield Value Security: Standard applications flexfield value security is attached to a responsibility, and applied to the user publishing and viewing financial reports.

User to Value Security: Custom security is defined in Report Manager for 11*i* to control access to secured financial report.

PL/SQL Based Security: Allows you to apply proprietary security developed for your organization to Report Manager for 11*i*.

See [Chapter 3, "Security"](#) for more information.

What is the difference between *User to Value Security* and *Flexfield Segment Security*?

User to Value security is Report Manager's built-in security for the viewing of reports. It is only applied in the viewing of reports and is set at the user level. Users without access to a certain value or set of values will not be able to view those values in any published reports.

Flexfield Segment Security, on the other hand, is set at the **responsibility** level and spans **all** Oracle Applications.

See [Chapter 3, "Security"](#) for more information.

How are users defined in Oracle Report Manager for 11i?

The users defined in Oracle Applications are the same user accounts used in Oracle Report Manager for 11i.

What types of reports can Oracle Report Manager for 11i access?

You can currently access **all** Oracle SRS reports (including FSG's) and **all** third party reports.

Which versions of Oracle products are required to run Oracle Report Manager for 11i?

To run Oracle Report Manager for 11i, the Oracle Applications servers must have the following. All required components are included with the CD pack upon purchase

- Oracle Applications Release 11i (patched to 11.5.3 or higher)
- Oracle 8.0 database or higher.

What is the technical architecture for Oracle Report Manager 11i?

Oracle Report Manager for 11i is a server side product residing within the database, within the Apps schema. There is also a Oracle Report Manager for 11i schema (FRM) which is used for displaying images within an HTML web page.

A.2 Using Oracle Report Manager for 11i

Is there a limit to the number of users for Oracle Report Manager for 11i?

There is no limit to the number of users in Oracle Report Manager for 11i.

Are there sizing limitations with Oracle Report Manager for 11i?

The only sizing limitation is the size of the tablespace/objects used to make the repository and house required reports.

Is there a way to automate report generation?

Not at the moment.

If I create a report, is it automatically refreshed for new time-frames?

No. Reports generated by Oracle Report Manager are static reports. To update the report to reflect a different timeframe than which it was created, the report will have to be re-generated.

When are published reports available on Oracle Report Manager for 11i?

The content provider has the option of making reports available immediately, after approvals or at a specific date and time.

Does the Oracle Report Manager for 11i repository need to reside in the applications instance?

Yes, the Oracle Report Manager for 11i repository needs to reside on the instance of Apps from which you want to pull information.

Can we incorporate the Personal Home Page to the company's Intranet home page?

You can have a link from the Personal Home Page to your Intranet site or vice-versa.

Is the Personal Home Page default? Is it created by some sort of wizard so that an organization can customize it towards their business needs?

Oracle Report Manager for 11i allows for the viewing of documents through two mechanisms, the Oracle Self-Service Personal Home Page and the Report Manager Public Home Page (PHP). Both the Public Home Page and the Personal Home Page can be customized.

A.3 Oracle Report Manager for 11i Requirements

Does Oracle Self-Service Apps need to be installed for Oracle Report Manager for 11i to work?

No. Self-Service runtime for the web is required. All components required to run Oracle Report Manager for 11i are included in the CD pack upon purchase.

Does Oracle Report Manager for 11i require a separate report server?

No. Oracle Report Manager for 11i resides on the same server as your Oracle Applications from which you will pull data.

How much space does the default repository use?

There is no default repository. All sizing depends in the volume of reports that are saved on the database.

A.4 Table Sizing

What is the issue with table sizing for Oracle Report Manager for 11i?

A common issue with Oracle Report Manager for 11i has been insufficient table size for documents. The solution is easy, simply increase the table size. Review Oracle Applications User's Guide for specific instructions.

What SQL program can I run to increase Oracle Report Manager for 11i's table size?

Here is the SQL to help determine sizing and growth capacity for a table, in particular the FND_DOCUMENTS_LONG_TEXT table. Following these guidelines will ensure you have sized the database correctly to support publishing reports into the database.

You can apply the same logic for checking the sizing for the other dependent tables, such as FND_DOCUMENTS and FND_DOCUMENTS_TL.

Object names are case sensitive. Ensure you use the right case. All this is based on Oracle7 DBA skills, so there may be more efficient ways of doing this, but this will work all the same.

1. Logon to the database as the "apps" schema owner. Ensure you can select from the DBA_SEGMENTS object (select * from dba_segments). If you can't, you'll need to sign on to the database as the "SYSTEM" schema owner.
2. Run the following SQL statement to get the true owner of the FND_DOCUMENTS_LONG_TEXT table: select OWNER, TABLESPACE_NAME from dba_tables where table_name = 'FND_DOCUMENTS_LONG_TEXT';

In this testing, the owner was "APPLSYS", and tablespace_name was 'USER_DATA', so that's what to use in the following examples.

3. Run the following SQL statement to get the current space (in bytes) allocated to the FND_DOCUMENTS_LONG_TEXT table:

```
select sum(bytes) from dba_segments
where owner = 'APPLSYS'
and segment_name = 'FND_DOCUMENTS_LONG_TEXT';
SUM(BYTES) 7471104
```

In this case, about 7 megabytes have already been allocated.

4. Run the following SQL statement to see how much space is available in the tablespace in which the FND_DOCUMENTS_LONG_TEXT table resides, and to see what the largest extent of available space is:

```
select sum(bytes), max(bytes)
from dba_free_space
where tablespace_name = 'USER_DATA';
SUM(BYTES) MAX(BYTES)      826769408 344211456
```

Here you see that there is around 826 megabytes of total free space, and the largest extent of free space within this pool is 344 megabytes in size.

5. Run the following SQL statement to see what the size of the next "extent" that will be added to the FND_DOCUMENTS_LONG_TEXT table will be.

```
select next_extent
from dba_tables
where owner = 'APPLSYS'
and table_name = 'FND_DOCUMENTS_LONG_TEXT';
NEXT_EXTENT 532480
```

From this, you can see that the next extent to be added to the FND_DOCUMENTS_LONG_TEXT table will be around 500 kilobytes.

Now we need to make this real for Internal Finance. If we're going to be adding 100 megabytes of content to the table for the "final" December reports, we'll need to make the next extent for the FND_DOCUMENTS_LONG_TEXT table large enough to fit this much content. In the example above, the next extent in ? a megabyte, so we'll need to adjust it to fit the hypothetical 100 megabytes.

6. You can do this with the following SQL statement

```
alter table APPLSYS.FND_DOCUMENTS_LONG_TEXT
storage (next 100m pctincrease 0);
```

The trick is to ENSURE that there is enough space left in the tablespace to fit this next extent. In the samples above, the largest free space extent was 344 megabytes, so there is no problem. If there was not a large enough free space extent, then you'll need to work with the DBA to add space to the tablespace, or to determine a "small extent allocation strategy".

Glossary

Content Frame

Display frame where reports are listed.

Content Set

A report component you build within General Ledger that defines the information in each report and the printing sequence of your reports. For example, you can define a departmental content set that prints one report for each department.

By assigning an optional content set to a report request, you can generate hundreds of similar reports in a single run. The content set controls how the numerous reports differ from each other. For example, you can define a departmental content set to create departmental income statements or balance sheets that print separate reports by department. You can also use content sets to create breakdown reports on other segments, such as cost centers, regions, and products.

Content sets work by overriding the row set definition of an existing report and replacing the row set account assignments and display options.

Content sets can be saved as part of a report definition, or can be added dynamically at the time you request an FSG (financial statement) report.

Expanded Report

One report displayed in a variety of ways depending upon a report hierarchy. For example, you can publish your corporate Income Statement for May, 2002 based on department. User views of the Income Statement are limited to those departments for which their responsibility allows.

Expanded Report Over Time

An expanded report available for different time periods.

Expansion Value

Expansion values define the different report views in Report Manager which are built by reports generated with content sets.

Financial Statement Generator (FSG)

A powerful and flexible tool you can use to build your own custom reports without programming. You can define reports online with complete control over the rows, columns and contents of your report. (From the *Oracle General Ledger User's Guide*.)

Flexfield Value Security

Security that is defined in Oracle Applications and attached to the responsibility you are using and to the folder to which you are publishing your reports.

Navigation Frame

Frame displaying responsibilities, reports, and report hierarchies.

PE (Page/Expand)

This content set display type expands the range and creates a separate report for each segment value in the range. You can only use this option for one segment in your account and you must enter a range of values for that segment. If you assign this option to a parent segment value, FSG will generate a separate report for each child value. FSG will also generate a separate report for the parent if you include a parent segment value in the child range. (From the *Oracle General Ledger User's Guide*.)

Personal Home Page

Self Service Applications home page and/or Oracle Portal page.

PL/SQL Based Security

You can use PL/SQL Based Security to leverage proprietary security developed for your organization. PL/SQL Based Security packages govern user access to report expansion values. Allows you to apply proprietary security developed for your organization to Report Manager.

Previewer

Reports with a *preview* status can only be viewed by designated previewers. Users with the appropriate responsibility can view the report before it is approved for release. When you use the Request Center to publish a report to the database, you can designate a previewer(s) who must approve the report for release. The

viewer can sign on to their personal home page and approve the report for immediate or later release.

Public Reports

Reports with unrestricted access for everyone in your organization.

Report Manager Public Home Page

Unrestricted, publicly accessible home page for the application.

Request Center

A centralized tool for submitting, monitoring, and publishing your reports.

Secured Reports

Reports that are protected with restricted access using logon and password.

Single Report

A complete report for a specific time period. For example, your corporate Income Statement for May, 2002.

Single Report Over Time

A single report produced for different periods. For example, your corporate Income Statement for the periods April, May, and June, 2002.

Timeframe Value

Value that determines the timeframe parameters for reports.

User to Value Security

Custom security that is defined in Report Manager for 11i to control access to secured financial report. User to Value Security allows you to define a security model for Report Manager based on segment values for financial reports published into the database.

