

Oracle® Business Intelligence Publisher

Install Guide

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Oracle Business Intelligence Publisher Install Guide, Release 10.1.3.2.1

Part No. B40084-01

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Preface

Intended Audience

Welcome to Release 10.1.3.2.1 of the *Oracle Business Intelligence Publisher Install Guide*.

This document is intended for administrators or implementers who wish to install Oracle Business Intelligence Publisher (BI Publisher).

See Related Information Sources on page vi for more Oracle product information.

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Structure

- 1 Introduction
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- 3 Installing Manually into a J2EE Application Server
- 4 Postinstallation Tasks
 - A Silent and Non-Interactive Installation
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Related Information Sources

Oracle Business Intelligence Publisher User's Guide

This guide contains information for the user on creating, running, and scheduling reports and information for the administrator on configuration and set up. The guide also contains an API reference for developers.

Oracle Containers for J2EE Deployment Guide

This covers information and procedures for deploying an application to an OC4J environment. This includes discussion of the deployment plan editor that comes with Oracle Enterprise Manager 10g.

Third-Party Licensing Information

The application uses **Apache Axis** and the **OpenSymphony Quartz Scheduler** open-source software packages. The Apache license agreement for Axis is included on the install media under `\doc\ApacheLicense.txt` and can also be obtained from <http://www.apache.org/licenses/LICENSE-2.0>. This license also covers the use of OpenSymphony Quartz Scheduler.

Introduction

Introduction to Installing Oracle Business Intelligence Publisher

Oracle Business Intelligence Publisher offers you the most efficient, scalable reporting solution available for complex, distributed environments. It provides a central architecture for generating and delivering information to employees, customers, and suppliers—both securely and in the right format. Oracle BI Publisher reduces the high costs associated with the development, customization and maintenance of business documents, while increasing the efficiency of reports management.

For the most current information please check:

Oracle Business Intelligence Publisher Web Page:

<http://www.oracle.com/technology/products/xml-publisher/index.html>

Oracle Business Intelligence Publisher Forum:

<http://forums.oracle.com/forums/forum.jspa?forumID=245>

About the BI Publisher Installer and Installation Options

The Oracle Universal Installer provided can be used to install BI Publisher with its own standalone Oracle Containers for Java (OC4J) instance or to install BI Publisher into an existing Oracle Application Server 10.1.3.1.0 (or later) Web container. However, you can also deploy BI Publisher on other J2EE application servers, such as Tomcat or Websphere.

BI Publisher has three installation options:

- Basic - the Oracle Universal Installer Basic option provides a standalone application server (Oracle Containers for Java 10.1.3.1) and Sun JDK (SUN 1.5.0-b5) with BI Publisher.
- Advanced - the Oracle Universal Installer Advanced option installs BI Publisher

into an existing Oracle Application Server 10.1.3.1 (or later).

- Manual - you can install BI Publisher manually into one of the supported J2EE servers.

For more information on using the Oracle Universal Installer options, see *Installing BI Publisher into Oracle Application Server OC4J 10.1.3.1*, page 2-1.

For more information on deploying BI Publisher manually into a supported J2EE application server, please refer to *Installing Manually into a J2EE Application Server*, page 3-1.

Environment Requirements

As of the initial release, the Oracle BI Publisher installer supports the following operating systems:

- Microsoft Windows 2000 Server
- Microsoft Windows 2003 Server R2 (32 bit)
- Oracle Enterprise Linux 4, Update 4
- Red Hat Enterprise Linux 4.x
- Novell SUSE Linux 9.x

To install BI Publisher on an operating system not supported by the installer, use the manual install option.

For the current available installer platforms, see the *Oracle Business Intelligence Publisher Release Notes* (Release 10.1.3.2.1) on the Oracle Technology Network [<http://www.oracle.com/technology/products/xml-publisher/xmlpdocs.html>].

Application Server Requirements

The BI Publisher server is supported in any J2EE application server that supports Java 1.4.2 or Java 5.0 (1.5). The following lists the application servers for which BI Publisher has been certified.

- Oracle Application Server 10.1.3.1
- Oracle Containers for Java 10.1.3.1
- Apache Tomcat 5.5.x
- IBM Websphere 6.0, 6.1
- Sun Java System Web Server 6.1, 7.0

Note: The Basic installation provides a standalone Oracle Containers for Java (OC4J) 10.1.3.1.

Database Requirements

Note: The database is optional, but required for the scheduler schema.

BI Publisher is supported to run against any database that supports JDBC based on Java 1.4.2 or Java 5.0 (1.5). BI Publisher has certified against the following databases as a source of data as well as a database to install and run the BI Publisher Scheduler schema:

- Oracle Database 9i or 10g
- Microsoft SQL Server 2000, 2005
- IBM DB2 for z/OS 8 (NFM mode)
- IBM DB2 for UDB EE 8.2
- Sybase Adaptive Server
- MySQL 4.1, 5.0

Web Browser Requirements

The BI Publisher application requires one of the following Web browsers:

- Microsoft Internet Explorer 6.0, 7.0
- Mozilla Firefox 1.5.x, 2.0

About Oracle BI Publisher Desktop Tools

Oracle Business Intelligence Publisher provides Microsoft Office-based design tools that automate the design process for creating templates for Oracle BI Publisher.

The BI Publisher desktop tools include the following:

- The Oracle BI Publisher Template Builder for Microsoft Word Add-in facilitates the development of RTF layout templates. The application includes documentation, demos, and samples. The Template Builder enables you to:
 - Connect to the Oracle BI Publisher server to retrieve data to build your template.
 - Quickly insert common report elements such as data fields, tables, charts, and

cross tabulations.

- Upload your template to the Oracle BI Publisher server.
 - Extract boilerplate text into an XLIFF translation file and test the translations.
 - Validate your template.
- The Template Viewer enables you to preview your template in any of the supported output types with your sample data.
 - The Oracle BI Publisher Analyzer for Microsoft Excel (Excel Analyzer) is an add-in for Microsoft Excel that enables you to:
 - Export the results of the report query to an Excel spreadsheet.
 - Log in to BI Publisher from Excel to refresh your data, apply new parameters, and apply a template to the report data.
 - Create templates in Excel and upload them to the BI Publisher repository.
 - Access and run reports from an Excel session.

The system requirements for the Oracle BI Publisher Desktop tools are:

System Requirements for BI Publisher Desktop Tools

Component	Supported Versions
Client Operating System	<ul style="list-style-type: none">• Windows 2000• Windows 2003 SP1 (32-bit only)• Windows XP SP2 and later

Component	Supported Versions
Template Builder for Word Add-in	<ul style="list-style-type: none"> • Microsoft Word 2000 • Microsoft Word 2002 • Microsoft Word 2003 <p>Requires:</p> <ul style="list-style-type: none"> • Microsoft .NET Framework 2.0 • Java Runtime or JDK 1.4 or later
Excel Analyzer (If not installed on your computer, you will be prompted to download it the first time you select the Excel Analyzer button from the View Report page.)	<ul style="list-style-type: none"> • Microsoft Excel 2000 • Microsoft Excel 2002 • Microsoft Excel 2003 <p>Requires:</p> <ul style="list-style-type: none"> • Microsoft .NET Framework 2.0

See the topic [Installing Oracle BI Publisher Desktop Tools](#), page 4-7.

About Postinstallation Tasks

After installing the BI Publisher server, perform the following to complete your installation. These tasks are described in detail in [Postinstallation Tasks](#), page 4-1.

- **Configure the Scheduler database (required for the scheduler)**
The scheduler is optional. If you choose to implement BI Publisher's scheduler, you must install the schema to the target database.
- **Configure the Demo Data sources (optional)**
The BI Publisher installation includes demonstration reports. Some reports use a File data source that is automatically configured by the installer. Some reports use a JDBC data source and Oracle database sample schema that you must configure in the BI Publisher Admin screens.
- **Install the Oracle BI Publisher Template Builder for Microsoft Word Add-in (optional)**

Install this template building tool on the client computers of users who will be developing RTF templates.

Installing BI Publisher into Oracle Application Server or OC4J 10.1.3.1

Introduction

This chapter discusses the installation of BI Publisher using the Oracle Universal Installer.

Performing a Basic Install

Basic Installation

The following steps guide you through the installer.

Run the Oracle Universal Installer:

1. Access the installation files.

- **For Windows install:**

From the Oracle BI Publisher product media, navigate to the `install` directory.

Run the program `setup.exe`.

- **For Linux or Unix install:**

From the Oracle BI Publisher product media, navigate to the `install` directory:

```
cd install
```

Execute the `runInstaller` script.

```
./runInstaller
```

The installation program window appears and prompts you through each screen. Provide the requested input for each screen.

To continue to the next screen, click Next. To return to a previous screen, click Back.

2. Specify file locations.

Accept the default drive and directories, or click Browse to change them. Do not change the Source Path. You may accept the default Destination Name and Path or change them as you wish.

3. Select installation type.

The installation type screen allows you to choose between Basic and Advanced installs. The Basic type installs BI Publisher into a standalone OC4J bundled within the install. The Advanced type installs BI Publisher into an existing Oracle Application Server 10.1.3.1 (or later).

Select Basic.

4. Choose your OC4J Administrator (oc4jadmin) password.

The Basic install provides a standalone OC4J. Enter the password you wish to use for this OC4J.

The Administrator password must be a minimum of 5 characters, maximum of 30 characters, and include at least one digit.

5. Review the summary information, which lists the components to be installed and shows the installation location and size.

6. Click **Install** to begin the installation and display the Install screen.

The Install Screen

The Install screen displays the current task and the installation progress bar. The installation process consists of three general phases:

Copy Files

Setup

Configuration

Click **Stop Installation** if you want to terminate the install process.

The Configuration Assistants Screen

This screen shows the name, status, and tool type for tools recommended to be run before completing the installation.

This installer includes one tool: the BI Publisher Configuration Assistant.

The tool may have one of the following states, as shown in the status column:

- **Succeeded:** The tool ran successfully.
- **Failed:** The tool ran, but failed.

- **Pending:** The tool is waiting to run.
- **Cancelled:** The tool was cancelled by the user (by clicking Stop).
- **In Progress:** The tool is currently running.

When the configuration assistant completes, OUI automatically proceeds to the next page.

If the configuration assistant does not complete, the installation screen displays the error message, and the configuration assistant writes its result code to the following log file: `C:\Program Files\Oracle\Inventory\logs\installActionstimestamp.log`

For all failed or skipped tools, OUI generates a list of the tool names and the commands used to run them; you can copy/paste this information directly into a shell script or batch file to run these tools after installation is complete. The generated script file is named `configtoolcmds.pl` and is located in the `ORACLE_HOME\bin` directory. The script is generated after you exit the installer.

The End of Installation Screen

The End of Installation screen informs you that installation was successful and provides instructions on starting and stopping BI Publisher, the BI Publisher login URL and additional details about your installation. These details will also be saved in `BI_Publisher_readme.txt` in the Destination path you specified in the second screen of the installation procedure.

Log in to the BI Publisher Server:

At the end of the installation the BI Publisher server will be running.

Note: If you attempt to start BI Publisher when it is running, the `start` command will return errors.

1. Launch the BI Publisher application using one of the following methods:

- On Windows:

From the Start menu, navigate to:

Start > Programs > Oracle - *OracleHomeName* > BI Publisher Server

OracleHomeName refers to the name you gave the Oracle Home where you installed Oracle BI Publisher.

- Open your browser to `http://hostname:port/xmlpserver`

For example:

`http://localhost:9704/xmlpserver`

2. Log in with user name "Administrator" and password "Administrator".

Important: Please change the Administrator password on the **Account** tab under **Preferences**.

Continue with Postinstallation Tasks, page 4-1.

Performing an Advanced Install

Advanced Installation

The following steps guide you through the installer for an Advanced installation.

Run the Oracle Universal Installer:

1. Access the installation files.

- **For Windows install:**

From the Oracle BI Publisher product media, navigate to the install directory.

Run the program setup.exe.

- **For Linux or Unix install:**

From the Oracle BI Publisher product media, navigate to the install directory:

```
cd install
```

Execute the runInstaller script.

```
./runInstaller
```

The installation program window appears and prompts you through each screen. Provide the requested input for each screen.

To continue to the next screen, click Next. To return to a previous screen, click Back.

2. Specify file locations.

Accept the default drive and directories, or click Browse to change them. Do not change the Source Path. You may accept the default Destination Name and Path or change them as you wish.

3. Select installation type.

The installation type screen allows you to choose between Basic and Advanced installs. The Basic type installs BI Publisher into a standalone OC4J bundled within the install. The Advanced type installs BI Publisher into an existing Oracle Application Server 10.1.3.1 or later.

Select Advanced.

4. Choose your Application Server 10g home location. Click "Installed Products" to see the list of Oracle Homes and display the location (path).
5. Enter the oc4j Administrator password for the Application Server into which you are installing BI Publisher.
6. Review the summary information, which lists the components to be installed and shows the installation location and size.
7. Click **Install** to begin the installation and display the Install screen.

The Install Screen

The Install screen displays the current task and the installation progress bar. The installation process consists of three general phases:

Copy Files

Setup

Configuration

Click **Stop Installation** if you want to terminate the install process.

The Configuration Assistants Screen

This screen shows the name, status, and tool type for tools recommended to be run before completing the installation.

This installer includes one tool: the BI Publisher Configuration Assistant.

The tool may have one of the following states, as shown in the status column:

- **Succeeded:** The tool ran successfully.
- **Failed:** The tool ran, but failed.
- **Pending:** The tool is waiting to run.
- **Cancelled:** The tool was cancelled by the user (by clicking Stop).
- **In Progress:** The tool is currently running.

When the configuration assistant completes, OUI automatically proceeds to the next page.

If the configuration assistant does not complete, the installation screen displays the error message, and the configuration assistant writes its result code to the following

log file: C:\Program
Files\Oracle\Inventory\logs\installActionstimestamp.log

For all failed or skipped tools, OUI generates a list of the tool names and the commands used to run them; you can copy/paste this information directly into a shell script or batch file to run these tools after installation is complete. The

generated script file is named `configtoolcmds.pl` and is located in the `ORACLE_HOME\bin` directory. The script is generated after you exit the installer.

The End of Installation Screen

The End of Installation screen informs you that installation was successful and provides instructions on starting and stopping BI Publisher, the BI Publisher login URL and additional details about your installation. These details will also be saved in `BI_Publisher_readme.txt` in the Destination path you specified in the second screen of the installation procedure.

At the end of the installation, the OUI will start the BI Publisher server.

Log in to BI Publisher:

At the end of the installation the BI Publisher server will be running.

1. Launch the BI Publisher Application:

- On Windows:

From the Start menu, navigate to:

Start > Programs > Oracle - *OracleHomeName* > BI Publisher Server

OracleHomeName refers to the name you gave the Oracle Home where you installed Oracle BI Publisher.

- Open your browser to `http://hostname:port/xmlpserver`

Note that the port is the http port of your application server.

For example:

`http://localhost:8888/xmlpserver`

2. Log in with user Administrator and password Administrator.

Important: Please change the Administrator password on the **Account** tab under **Preferences**.

Continue with Postinstallation Tasks, page 4-1.

Installing Manually into a J2EE Application Server

Introduction

The BI Publisher install media contains:

- BI Publisher server application
- BI Publisher runtime libraries
- BI Publisher fonts
- BI Publisher desktop tools
- Documentation: User's Guide, Javadocs, demos, and samples

Individual components are located as follows:

Directory	Component
manual\fonts	Font files
manual\generic	xmlpserver.war (for non-oc4j application servers) xmlpserver.ear (for non-oc4j application servers)
manual\oc4j	xmlpserver.ear (for oc4j)
manual\XMLP	XMLP repository
manual\XMLP\DemoFiles	Data source for demo reports.

Directory	Component
manual\XMLP\Tools	Template Builder for Word Add-in

Installation Process Overview

The server application allows you to create, manage and schedule reports. You must perform the following steps as described in this document to deploy Oracle BI Publisher manually:

1. Deploy BI Publisher on the application server.
2. Configure the BI Publisher repository and install fonts.
3. Perform postinstallation tasks:

Create the BI Publisher scheduler schema on the database server (required to send and schedule reports).

Set up the BI Publisher Demo Reports

Installing into a J2EE Application Server

BI Publisher is a pure J2EE application and has been extensively tested on:

- Oracle AS 10.1.3
- OC4J Standalone 10.1.3
- Apache Tomcat 5.5
- IBM WebSphere 6.0, 6.1
- Sun Java System Web Server 6.1, 7.0

Oracle AS 10.1.3 and OC4J 10.1.3 Deployment

Depending on how you have installed Oracle Application Server or OC4J, there are several methods you can use to deploy BI Publisher. The following steps use the `admin_client.jar` file to deploy BI Publisher on Oracle AS 10.1.3 or OC4J 10.1.3. Please refer to the *Oracle Containers for J2EE Deployment Guide* to see which deployment method is best for your installation.

1. Deploy the `xmlpserver.ear` to your OC4J instance.

Example:

```
C:\SOAJ2EE\j2ee\home> C:\SOAJ2EE\jdk\jre\bin\java -jar
admin_client.jar
deployer:oc4j:opmn://myserver.company.com/home oc4jadmin
oc4jadmin -deploy -file
C:\Temp\BIPublisher10132\Disk1\manual\oc4j\xmlpserver.ear
-deploymentName xmlpserver -bindAllWebApps
```

2. Launch the BI Publisher application.

Open your browser to `http://hostname:port/xmlpserver`

For example:

`http://localhost:8888/xmlpserver`

3. If you see the login page, proceed to Configuring the BI Publisher Repository and Installing Fonts, page 3-7.

Apache Tomcat 5.5 Deployment

There are several approaches available to deploy applications to the Tomcat servlet container. Please see the *Apache Tomcat Application Developer's Guide* to determine which method is appropriate for your installation. The following steps use the Tomcat Web Application Manager to deploy BI Publisher on Apache Tomcat 5.5:

Important: Apache Tomcat deployments of BI Publisher require that folder and file names use ASCII characters only. Any non-ASCII character will be displayed incorrectly.

1. Open the Tomcat home page.
2. Select **Tomcat Manager** and log in.
3. From the **Tomcat Web Application Manager** page, under the **Deploy** region, browse for and select the `manual\generic\xmlpserver.war` from your install media. Select the **Deploy** button.
4. Ensure the xmlpserver application successfully deployed. If successful, /xmlpserver will appear on the **Tomcat Web Application Manager** page under the list of Applications.
5. Open your browser, `http://hostname:port/xmlpserver` to see the login page.
For example: `http://localhost:8080/xmlpserver`
6. If you see the login page, proceed to Configuring the BI Publisher Repository and

Installing Fonts, page 3-7.

IBM WebSphere 6.0 and 6.1 Deployment

This section describes one example of how to deploy the BI Publisher application to the IBM WebSphere 6.0 or 6.1 application server. Refer to your WebSphere documentation for the appropriate procedure to install into your environment.

1. Access the WebSphere Administrative Console, select **Install New Application**.
2. Choose the `manual/generic/xmlpserver.ear` file from your installation media.
3. Select the **Generate Default Bindings** checkbox and click **Next**.
4. On the **Select installation options** page, select the **Distribute application** checkbox and the **Create MBeans for resources** checkbox.
5. On the **Map modules to servers** page, select `xmlpserver.war`.
6. On the **Map virtual hosts for Web modules** page select `xmlpserver.war`.
7. On the Summary screen, review your selections, and select **Finish**.
8. You will see the deployment status on the screen. Once you see the success message, select the **Save to Master Configuration** link.
9. Restart BI Publisher.

From the WebSphere Administration Console, select the **Enterprise Applications** link, choose "xmlpserver" and click the **Stop** button. Once stopped, choose "xmlpserver" and click the **Start** button.

10. Launch BI Publisher:

Open your browser to `http://hostname:port/xmlpserver` to see the login page.

For example: `http://localhost:8080/xmlpserver`

11. If you see the login page, proceed to Configuring the BI Publisher Repository and Installing Fonts, page 3-7.

Sun Java System Web Server 6.1 Deployment

This section describes one example of how to deploy the BI Publisher application. Follow the guidelines in your Sun Java System Web Server 6.1 documentation for the appropriate method for your installation.

Important: To successfully deploy BI Publisher on Sun Java System Web Server 6.1 you must perform the predeployment and postdeployment configuration steps described in this section:

- Before you deploy, you must ensure that the `maxUploadSize` property is set appropriately as described in Step 1.
- After you deploy, you must configure the `system.xml` file as described in Step 11.

The `xdoparser.jar` files include files from the `W3C org.w3c.dom` package that are excluded from the same package included with the Sun Java System Web Server `system.jar` files. To ensure these files are loaded from the `xdoparser.jar` file, you must configure the `server.xml` file to load the `xmlparser.jar` files first.

1. Ensure the `maxUploadSize` property is set appropriately to handle the size of the BI Publisher WAR file. It is recommended that you set the `maxUploadSize` property to 100 megabytes.

To set the `maxUploadSize` property:

In the `<WebServer-install-dir`

`>/bin/https/webapps/admin-app/WEB-INF/web.xml`, add the following parameter:

```
<init-param>
  <param-name>maxUploadSize</param-name>
  <param-value>100000000</param-value>
</init-param>
```

For example:

```
<servlet-name>webappdeploy</servlet-name>
<servlet-class>com.sun.web.admin.servlets.DeployServlet</servlet-class>
<init-param>
  <param-name>maxUploadSize</param-name>
  <param-value>100000000</param-value>
</init-param>
```

2. Restart the application server.
3. In a browser, open the Admin Console of the Sun Java System Web Server 6.1.
4. Select a Server from the list and click **Manage**.
5. Select the **Virtual Server Class** tab.
6. Select a Class from the list and click **Manage**.
7. From the **Select a Virtual Server** drop-down list, choose your server and click

Manage.

8. Select the **Web Applications** tab.
9. On the **Deploy Web Application** page, browse for and select `manual\generic\xmlpserver.war` (non-oc4j version) from your install media. In the Application URI field, enter `/xmlpserver` then click OK.

Please note where this WAR file deployed, indicated in the **Installation Directory** field.

10. Click OK to deploy the application. A message appears informing that you must apply the changes. Click **Apply** in the top right corner, then click **Apply Changes**.
11. Configure the Sun Java System Web Server `server.xml` file to load the `xdoparser.jar` files first:

- Open `<WebServer-install-dir>/<https-name-of-webserver-instance>/config/server.xml`
- Add the following class path as the first entry for the `serverclasspath` attribute value in the `<JAVA>` tag:

```
<WebServer-install-dir>/<https-name-of-webserver-instance>/webapps/<https-name-of-web-server-instance>/xmlpserver/WEB-INF/lib/xdoparser.jar
```

Example from `server.xml`:

```
<JAVA javahome="C:/Sun/WebServer6.1/bin/https/jdk"
serverclasspath="C:/Sun/WebServer6.1/https-xmlphost/webapps/https-xmlphost/xmlpserver/WEB-INF/lib/xdoparser.jar;C:/Sun/WebServer6.1/bin/https/jar/websevr-rt.jar;${java.home}/lib/tools.jar;C:/Sun/WebServer6.1/bin/https/jar/websevr-ext.jar;C:/Sun/WebServer6.1/bin/https/jar/websevr-jstl.jar;C:/Sun/WebServer6.1/bin/https/jar/ktsearch.jar"
classpathsuffix="" envclasspathignored="true"
nativelibrarypathprefix="" debug="false" debugoptions="-Xdebug -Xrunjdpw:transport=dt_socket,server=y,suspend=n"
dynamicreloadinterval="-1">
```

12. Launch the BI Publisher application:

Open your browser to `http://hostname:port/xmlpserver` to see the login page.

For example: `http://localhost:8080/xmlpserver`

13. If you see the login page, proceed to *Configuring the BI Publisher Repository and Installing Fonts*, page 3-7.

Sun Java System Web Server 7.0 Deployment

This section describes one example of how to deploy the BI Publisher application. Follow the guidelines in your Sun Java System Web Server 7.0 documentation for the appropriate method for your installation

1. In a browser, open the Admin Console of the Sun Java System Web Server 7.0.
2. Select the **Virtual Servers** tab under **Configurations**.
3. Select the virtual server, into which you will deploy the BI Publisher application.
4. Select the **Web Applications** tab, and then click **New**.
5. Browse for and select `manual\generic\xmlpserver.war` (non-oc4j version) from your install media. (Optionally, you can also specify a Web application archive located on the server.)
6. In the Application URI field, enter `/xmlpserver` then click OK.
7. Enable the application.
8. Click **Deployment Pending**.
9. Click the **Deploy** button to deploy the BI Publisher application.
10. Launch the BI Publisher application:
Open your browser to `http://hostname:port/xmlpserver` to see the login page.
For example: `http://localhost:8080/xmlpserver`
11. If you see the login page, proceed to *Configuring the BI Publisher Repository and Installing Fonts*, page 3-7.

Configuring the BI Publisher Repository and Installing Fonts

After deploying BI Publisher in your application server, you must set up the BI Publisher repository and install the font files.

To set up the repository, copy the xmlp repository directory to a location on your server, then edit the configuration file to point to the saved location as follows:

1. Copy the XMLP repository directory from `\manual` on your installation media to your server.
2. Open the `xmlp-server-config.xml` file located in the

<application installation>/WEB-INF/ directory, where your application server unpacked the war or ear file.

Example:

In an AS/OC4J 10.1.3 deployment, the location is

```
<ORACLE_HOME>/j2ee/home/applications/xmlpserver/xmlpserver/WEB-INF/xmlp-server-config.xml
```

The file contains the following:

```
<?xml version="1.0" encoding="UTF-8"?>
<xmlpConfig xmlns="http://xmlns.oracle.com/oxp/xmlp">
  <resource>
    <file path="%s_Reports_Path%"/>
  </resource>
</xmlpConfig>
```

3. Replace %s_Reports_Path% with file path to the location where you copied the XMLP repository directory on your server.

For example, if you copied the repository directory to /home/repository/XMLP, update the xmlp-server-config.xml file as follows:

```
<?xml version="1.0" encoding="UTF-8"?>
<xmlpConfig xmlns="http://xmlns.oracle.com/oxp/xmlp">
  <resource>
    <file path="/home/repository/XMLP"/>
  </resource>
</xmlpConfig>
```

Save xmlp-server-config.xml after updating.

4. Copy the font files from the manual\fonts on the install media to the fonts directory of the Java Runtime Environment used by your J2EE container/application server.

Example for Apache Tomcat:

```
C:\Program Files\Java\jre1.5.0_07\lib\fonts
```

Example for Oracle Application Server or OC4J:

```
<ORACLE_HOME>...\jdk\jre\lib\fonts
```

Example for WebSphere:

```
<WebSphere dir>/AppServer/java/jre/lib/font
```

5. Restart your application server.

6. Launch BI Publisher:

Open your browser to <http://hostname:port/xmlpserver>

For example:

```
http://localhost:8888/xmlpserver
```

7. Log in with user name "Administrator" and password "Administrator".

Important: Please change the Administrator password on the **Account** tab under **Preferences**.

Postinstallation Tasks

Introduction

This chapter describes the required and optional tasks to be performed after the successful installation of the BI Publisher server into an OC4J instance or other J2EE application server.

The topics in this chapter include:

- Postinstall Checklist
- Configuring the Scheduler Database
- Configuring the Demo Data Sources
- Installing Oracle BI Publisher Desktop

Postinstall Checklist

To complete your BI Publisher install, perform these tasks:

- Configure the scheduler database
- Configure the JDBC demo data source
- Configure the File demo data source
- Install BI Publisher Desktop

Configuring the Scheduler Database

To schedule reports you must configure a database and install the BI Publisher scheduler schema. See Environment Requirements, page 1-2 for the list of supported

databases.

The following scheduler setup options are described in detail in the following sections:

- Oracle Database with Oracle AS/OC4J 10.1.3 or Tomcat
- Microsoft SQL Server on Oracle AS/OC4J 10.1.3
- Microsoft SQL Server on Tomcat

Configuring the Scheduler on Oracle Database 10g

Follow the steps below to configure Oracle Database 10g for BI Publisher:

1. Create a user on the database with connect and resource privileges (for example: bipubsched).
2. Log in to BI Publisher as a user with Administrator privileges and select the **Admin** tab.
3. Under **System Maintenance**, select **Scheduler Configuration**.
4. Enter the database connection information for the target Oracle database and user.

Database Type: 10g

Connection String: jdbc:oracle:thin://<hostname>:<port#>:<oracle SID>

Username/Password for the database user (for example: bipubsched)

Database Driver Class: oracle.jdbc.driver.OracleDriver

5. Click the **Test Connection** button to make sure the connection information is valid.
6. Click the **Install Schema** button to install the scheduler tables.
7. Restart the BI Publisher application.

Proceed to Setting Up the Demo Data Sources, page 4-5.

Configuring the Scheduler on SQL Server with Oracle Application Server/OC4J 10.1.3

Important: Your Microsoft SQL Server database must be set up using "Mixed Mode" authentication.

1. Create a user on the database and assign the user the "db_owner" role.

2. Download DataDirect JDBC drivers.

Oracle provides a JDBC driver for non-Oracle databases called Oracle DataDirect. This document refers to Oracle DataDirect version 3.4. Please refer to the following links for more information and to download the drivers:

- Download DataDirect JDBC Drivers:

<http://www.oracle.com/technology/software/products/ias/htdocs/utisoft.html>

3. Set up DataDirect on OC4J.

For more information, see the *Oracle Containers for J2EE Services Guide*.

4. Register the DataDirect JDBC Driver on OC4J.

- Open OC4J Application Server Control (ASC).
- Choose the **Administration** tab and click **Shared Libraries**.
- On the **Shared Libraries** page, click **Create**.
- Enter the **Shared Library Name** (example: jdbc.datadirect) and **Shared Library Version** (example: 1.0).
- Upload JDBC driver files and click OK:
 - YMbase.jar
 - YMresource.jar
 - YMulti.jar
 - YMdb2.jar
 - YMsybase.jar
 - YMsqlserver.jar
- On the Import Shared Libraries page, select "oracle.xml" and "oracle.toplink". Click **Finish**.

5. Redeploy the application.

- From the Enterprise Manager Application Server Control page, select the **Applications** tab, then click **Deploy**.
- On the **Select Archive** step, in the **Archive Location** field, browse for and select the xmlpsrver.ear file. Select Next.

- Enter the Application Attributes.
Example:
Application Name: xmlpserver
Parent Application: default
Bind Web Module to Site: default-web-site
Context Root: xmlpserver
Select **Next**.
- On the **Deployment Settings** step, click the Configure Class Loading task icon.
- On the **Configure Class Loading** page select the shared library you created ("jdbc.datadirect") and deselect "oracle.toplink", then click OK.
- From the Deployment Settings page, click **Deploy** to deploy the application.
- Restart the application.

6. Set up the connection to the Microsoft SQL Server database in BI Publisher.

- Log in to BI Publisher Enterprise as Administrator, click the **Admin** tab then click **Scheduler Configuration**.
- Enter the SQL Server information (see the following for detail) and click Apply to save it.

Database Type: Microsoft SQL Server

Connection String:

jdbc:oracle:sqlserver://<hostname>:<port#>;DatabaseName=<database name>;selectMethod=cursor

Username and Password for the database user

Database Driver Class: com.oracle.ias.jdbc.sqlserver.SQLServerDriver

- Click the **Test Connection** button.
- If successful, click **Install Schema** to install the scheduler schema.
- Restart the BI Publisher application to make your changes effective.

Proceed to Setting Up the Demo Data Sources, page 4-5.

Configuring the Scheduler on Microsoft SQL Server 2000 with Tomcat

1. Register the JDBC Driver for Microsoft SQL Server 2000 on Tomcat.

You can download the JDBC Driver for Microsoft SQL Server 2000 from the following location:

<http://www.microsoft.com/downloads/details.aspx?familyid=9f1874b6-f8e1-4bd6-947c-0fc5bf05bf71&displaylang=en>

- To register the JDBC driver for Microsoft SQL Server 2000:
Add JDBC driver files under `$CATALINA_HOME/common/lib` directory.
 - Add the Microsoft JDBC driver for SQL Server 2000 files:
msbase.jar
mssqlserver.jar
msutil.jar
2. Set up the connection to the Microsoft SQL Server database in BI Publisher.
- Log in to BI Publisher Enterprise as Administrator, click the **Admin** tab and then click **Scheduler Configuration**.
 - Enter the SQL Server information (see the following for detail) and click Apply to save it.
Database Type: Microsoft SQL Server
Connection String:
jdbc:oracle:sqlserver://<hostname>:<port#>;DatabaseName=<database name>;selectMethod=cursor
Username and Password for the database user
Database Driver Class: com.oracle.ias.jdbc.sqlserver.SQLServerDriver
 - Click the **Test Connection** button.
 - If successful, click **Install Schema** to install the scheduler schema.
3. Restart the BI Publisher application.

Proceed to Setting Up the Demo Data Sources, page 4-5.

Setting Up the Demo Data Sources

BI Publisher provides a set of demonstration reports for you to view and run as samples.

The sample reports use a file-based data source and a JDBC data source. Follow the steps below to configure the data sources.

Configuring the Demo File Data Source

The XMLP directory contains the DemoFiles data source directory. Set up this folder as a file-based data source as follows:

1. Locate the DemoFiles directory in your installation.

For example: `C:\OracleBI\xmlp\XMLP\DemoFiles`

If you performed a manual installation, the XMLP directory will be located where you copied it in the step *Configuring the BI Publisher Repository and Copying Fonts*, page 3-7.

2. Log in to BI Publisher with Administrator credentials.
3. Select the **Admin** tab.
4. In the **Data Sources** section, select **File**.
5. Select the data source with the name "demo files".
6. Enter the path to the DemoFiles folder.
For example: `C:\OracleBI\xmlp\XMLP\DemoFiles`
7. Click **Apply** to save the changes.

Configuring the Demo JDBC Data Source

Note: The demo data source must be connected to an Oracle Database with the sample schemas and users HR and OE unlocked.

1. Select the **Admin** tab.
2. In the **Data Sources** section, select the **JDBC Connection** link.
3. Select the select the data source with the name "demo".
4. In the **Update Data Source** screen, change the connection string to point to an Oracle 10g database with unlocked OE user.
5. Click the **Test Connection** button to confirm that BI Publisher can access the database.
6. Click **Apply** to save the changes.

Installing Oracle BI Publisher Desktop Tools

The Oracle BI Publisher Desktop tools are recommended for users who will be designing report layout templates.

Obtain the BI Publisher Desktop tools as follows:

Important: If you have installed an earlier version of the Template Builder for Word or the Excel Analyzer you must remove the previous version before installing a new version.

- From the Application:

The Oracle BI Publisher Template Builder for Microsoft Word Add-in can be installed from the BI Publisher application for users with either the BI Publisher Administrator Role or the BI Publisher Developer Role. The download link appears on the **Folder and Report Tasks** region. For more information, see the topic: *Creating an RTF Template Using the Template Builder for Word in the Oracle Business Intelligence Publisher User's Guide.*

The Excel Analyzer is downloaded on demand the first time the **Analyzer for Excel** button is selected from the View page. For more information see the topic: *Using the BI Publisher Analyzer for Excel in the Oracle Business Intelligence Publisher User's Guide.*

- The Oracle BI Publisher Template Builder for Microsoft Word Add-in can also be obtained from the install media:

Navigate to `\manual\XMLP\Tools\` to launch the install executable `BIPublisherDesktop.exe`. Follow the installer prompts.

Silent and Non-Interactive Installation

This appendix covers the following topics:

- Silent Installation
- Non-Interactive Installation
- Create the Response File
- Start the Installation
- Postinstallation
- Security Tips for Silent and Non-Interactive Installations
- Deinstallation

Silent Installation

Silent installation eliminates the need to monitor the Oracle BI Publisher installation because there is no graphical output and no input by the user.

Silent installation is accomplished by supplying the Oracle Universal Installer with a response file and specifying the `-silent` flag on the command line. The response file is a text file containing variables and parameter values which provide answers to the installer prompts.

If this is a first time installation of Oracle BI Publisher, you must create the registry keys before starting. Registry key creation is described in Preinstallation.

Use silent installation when there are similar installations on more than one computer. Additionally, use silent install when performing the Oracle BI Publisher installation from a remote location using the command line.

Non-Interactive Installation

Non-interactive installations also use a response file to automate the installation. In non-interactive installations, there is graphical output and users may enter input.

Non-interactive installation of Oracle BI Publisher is also accomplished by supplying the Oracle Universal Installer with a response file but without specifying the `-silent` flag on the command line. The response file is a text file containing variables and parameter values which provide answers to the installer prompts. If you have not provided responses to all of the installer prompts, you need to enter information during the installation.

If this is a first time installation of Oracle BI Publisher, you must create the registry keys before starting. Registry key creation is described in Preinstallation.

Use non-interactive installation of Oracle BI Publisher when there are specific screens you want to observe during installation.

Create the Response File

Before doing a silent or non-interactive installation, you must provide information specific to your installation in a response file. The installer will fail if you attempt an installation using a response file that is not configured correctly. Response files are text files that you can create or edit in a text editor.

Creating Response Files from Templates

Templates for response files are available in the `stage\Response` directory of your install media. Response file templates are available for the following installation types:

Installation Type	File Name
Basic Installation	<code>oracle.bi.publisher.install_type1.rsp</code>
Advanced	<code>oracle.bi.publisher.install_type2.rsp</code>

See the template files for descriptions of the parameters in the file.

Note: For Boolean parameters, specify either "true" or "false".

Creating Response Files by Using the Record Mode in the Installer

You can run the installer in record mode to save your inputs to a file that you can use later as a response file. This feature is useful if you need to perform the same installation on different computers.

To run the installer in record mode:

1. Start up the installer with the `-record` and `-destinationFile` parameters.

```
E:\> setup.exe -record -destinationFile newResponseFile
```

Replace *newResponseFile* with the full path to the response file that you want the installer to create.

Example: `C:\myBIPublisherResponse.rsp`

2. Enter your values in the installer screens. The installer will write these values to the file specified in the `-destinationFile` parameter.

When you click the **Install** button, the installer automatically writes all your values to the specified file. At this point, you can complete the installation on this computer, or you can exit without performing the installation.

Secure information, such as passwords, is not written to the file, so you must modify the response file before you can use it. To set the password, modify the `s_adminpwd` parameter. See the generated response file for a description of the parameter.

Note: Response files created by record mode can only be used for non-interactive installations. You cannot use a response file created by record mode in a silent installation.

Example Response Files

The following sections shows example response files for the following Oracle BI Publisher installation types:

- Example Response File for Basic Installation
- Example Response File for Advanced Installation

Note: Be sure that you read the description of each *parameter=value* in the provided sample files, and edit *value* accordingly for your environment.

Example Response File for a Basic Installation

The following shows an example of a response file for a silent installation of Oracle BI Publisher as described in the topic: Performing a Basic Install, page 2-1.

```

RESPONSEFILE_VERSION=2.2.1.0.0
UNIX_GROUP_NAME=<Value Unspecified>
FROM_LOCATION="..\stage\products.xml"
FROM_LOCATION_CD_LABEL=<Value Unspecified>
NEXT_SESSION_RESPONSE=<Value Unspecified>
ORACLE_HOME="C:\OHOME1"
ORACLE_HOME_NAME="OHOME1"
TOPLEVEL_COMPONENT={"oracle.bi.publisher","10.1.3.2.1"}
DEINSTALL_LIST={"oracle.bi.publisher","10.1.3.2.1"}
SHOW_SPLASH_SCREEN=true
SHOW_WELCOME_PAGE=false
SHOW_COMPONENT_LOCATIONS_PAGE=false
SHOW_CUSTOM_TREE_PAGE=false
SHOW_SUMMARY_PAGE=true
SHOW_INSTALL_PROGRESS_PAGE=true
SHOW_REQUIRED_CONFIG_TOOL_PAGE=true
SHOW_CONFIG_TOOL_PAGE=true
SHOW_XML_PREREQ_PAGE=true
SHOW_RELEASE_NOTES=true
SHOW_END_OF_INSTALL_MSGS=true
SHOW_ROOTSH_CONFIRMATION=true
SHOW_END_SESSION_PAGE=true
SHOW_EXIT_CONFIRMATION=true
NEXT_SESSION=true
NEXT_SESSION_ON_FAIL=true
SHOW_DEINSTALL_CONFIRMATION=true
SHOW_DEINSTALL_PROGRESS=true
ACCEPT_LICENSE_AGREEMENT=true
RESTART_SYSTEM=<Value Unspecified>
CLUSTER_NODES=<Value Unspecified>
OUI_HOSTNAME=<Value Unspecified>
REMOVE_HOMES=<Value Unspecified>
INSTALL_TYPE="install_type_1"
s_ASHome=<Value Unspecified>
s_adminpwd="Administrator1"

```

Example Response File for an Advanced Installation

The following shows an example of a response file for a silent installation of Oracle BI Publisher as described in the topic: [Performing an Advanced Install](#), page 2-4.

```

RESPONSEFILE_VERSION=2.2.1.0.0
UNIX_GROUP_NAME=<Value Unspecified>
FROM_LOCATION="..\stage\products.xml"
FROM_LOCATION_CD_LABEL=<Value Unspecified>
NEXT_SESSION_RESPONSE=<Value Unspecified>
ORACLE_HOME="C:\OHOME1"
ORACLE_HOME_NAME="OHOME1"
TOPLEVEL_COMPONENT={"oracle.bi.publisher","10.1.3.2.1"}
DEINSTALL_LIST={"oracle.bi.publisher","10.1.3.2.1"}
SHOW_SPLASH_SCREEN=true
SHOW_WELCOME_PAGE=false
SHOW_COMPONENT_LOCATIONS_PAGE=false
SHOW_CUSTOM_TREE_PAGE=false
SHOW_SUMMARY_PAGE=true
SHOW_INSTALL_PROGRESS_PAGE=true
SHOW_REQUIRED_CONFIG_TOOL_PAGE=true
SHOW_CONFIG_TOOL_PAGE=true
SHOW_XML_PREREQ_PAGE=true
SHOW_RELEASE_NOTES=true
SHOW_END_OF_INSTALL_MSGS=true
SHOW_ROOTSH_CONFIRMATION=true
SHOW_END_SESSION_PAGE=true
SHOW_EXIT_CONFIRMATION=true
NEXT_SESSION=true
NEXT_SESSION_ON_FAIL=true
SHOW_DEINSTALL_CONFIRMATION=true
SHOW_DEINSTALL_PROGRESS=true
ACCEPT_LICENSE_AGREEMENT=true
RESTART_SYSTEM=<Value Unspecified>
CLUSTER_NODES=<Value Unspecified>
OUI_HOSTNAME=myhost.mycompany.com
REMOVE_HOMES=<Value Unspecified>
INSTALL_TYPE="install_type_2"
s_ASHome="C:\product\10.1.3.1\OracleAS_1"
s_adminpwd="Administrator1"

```

Start the Installation

To make the installer use the response file, specify the location of the response file that you want to use as a parameter when starting the installer.

To perform a non-interactive installation:

```
E:\temp\BIPublisher\ > setup.exe -responseFile
absolute_path_and_filename
```

To perform a silent installation, use the `-silent` parameter:

```
E:\temp\BIPublisher\ > setup.exe -silent -responseFile
absolute_path_and_filename
```

Postinstallation

The success or failure of the non-interactive and silent installations is logged in the `installActions<time_stamp>.log` file. Additionally, the silent installation creates the `silentInstall<time_stamp>.log` file. The log files are created in the `C:\Program Files\Oracle\Inventory\Logs` directory.

The `silentInstall<time_stamp>.log` file contains the following line if the installation was successful:

The installation of Oracle BI Publisher <Installation Type> was successful.

The `installActions<time_stamp>.log` file contains specific information for each Oracle BI Publisher installation type.

Security Tips for Silent and Non-Interactive Installations

One of the pieces of information in the response file is the installation password.

To minimize security issues regarding the password in the response file, follow these guidelines:

- Set the permissions on the response files so that they are readable only by the operating system user who will be performing the silent or non-interactive installation.
- If possible, remove the response files from the system after the silent or non-interactive installation is completed.

Deinstallation

You can perform a silent deinstallation of Oracle BI Publisher by supplying a silent deinstallation parameter to the response file you used for installation.

Modify the following parameter in your installation response file:

```
REMOVE_HOMES={"<ORACLE_HOME to be removed>"}
```

For example:

```
REMOVE_HOME="C:\oracle\ora_j2ee"
```

To perform a silent deinstallation, use the `-deinstall` parameter when entering the command:

```
E:\> setup.exe -silent -deinstall -responseFile  
absolute_path_and_filename
```

Deinstalling BI Publisher

Deinstallation Procedure

Follow these steps to deinstall Oracle BI Publisher:

1. Remove the BI Publisher application from its J2EE container.

Consult your application server documentation for instructions on removing an application.

2. Run the Oracle Universal Installer to remove application files.

Launch the OUI from the following path:

Start > Programs > Oracle > Oracle - Instance Name > Oracle Installation Products > Universal Installer

3. Select **Deinstall Products**.

From the Inventory dialog, select Oracle Business Intelligence Publisher 10.1.3.2.1 and click **Remove**.

4. If you performed a manual install, manually delete the BI Publisher repository directory and font files.

5. Remove BI Publisher Desktop tools using Microsoft Windows Add or Remove Programs utility.

