Oracle® Fusion Middleware

Upgrade Guide for Oracle Business Intelligence

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Oracle Fusion Middleware Upgrade Guide for Oracle Business Intelligence, 11*g* Release 1 (11.1.1)

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Primary Author: Joseph Paul

Contributing Author: Mike Meditzky, Trish Fuzesy, Joe Paradise

Contributor:

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Preface

This preface contains the following sections:

Audience

This manual is intended for Oracle Fusion Middleware system administrators who are responsible for installing and upgrading Oracle Business Intelligence 11g. It is assumed that the readers of this manual have knowledge of the following:

- Oracle Business Intelligence system administration and configuration
- The configuration and expected behavior of the system being upgraded

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Related Documents

For more information, see the following related documentation available in the Oracle Fusion Middleware 11*g* documentation library:

- Related Upgrade Documentation
  - *Oracle Fusion Middleware Upgrade Planning Guide*
  - *Oracle Fusion Middleware Upgrade Guide for Java EE*
  - *Oracle Fusion Middleware Upgrade Guide for Oracle SOA Suite, WebCenter, and ADF*
  - *Oracle Fusion Middleware Upgrade Guide for Oracle Identity Management*
- *Oracle Fusion Middleware Installation Planning Guide*
- *Oracle Fusion Middleware Administrator's Guide*

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Summary of the Oracle Business Intelligence Upgrade Process

This chapter provides a high-level summary of the steps required to upgrade the following Oracle Business Intelligence components from Oracle Business Intelligence 10*g* to Oracle Business Intelligence 11*g*:

- Oracle Business Intelligence Enterprise Edition (Oracle BI EE)
- Oracle Business Intelligence Publisher (Oracle BI Publisher)
- Oracle Real-Time Decisions (Oracle RTD)

This chapter includes the following topics:

1.1 Upgrade Overview

Upgrading Oracle Business Intelligence from 10*g* to 11*g* is an out-of-place process performed by Upgrade Assistant. You run a clean installation of Oracle BI 11*g*, and import data from the 10*g* system. Run Upgrade Assistant once to upgrade the RPD or Publisher Repository, and once to upgrade the Scheduler schema. If you have multiple RPDs and Web Catalogs, you must run Upgrade Assistant once for each RPD and Web Catalog.

Upgrade Assistant does not upgrade customizations made to the Oracle BI 10*g* system. Any configurations made in 10*g* must be manually copied over to the 11*g* system after the upgrade process is complete. For other post-upgrade tasks and considerations, see Chapter 7, "Oracle Business Intelligence Post-Upgrade Tasks and Considerations."

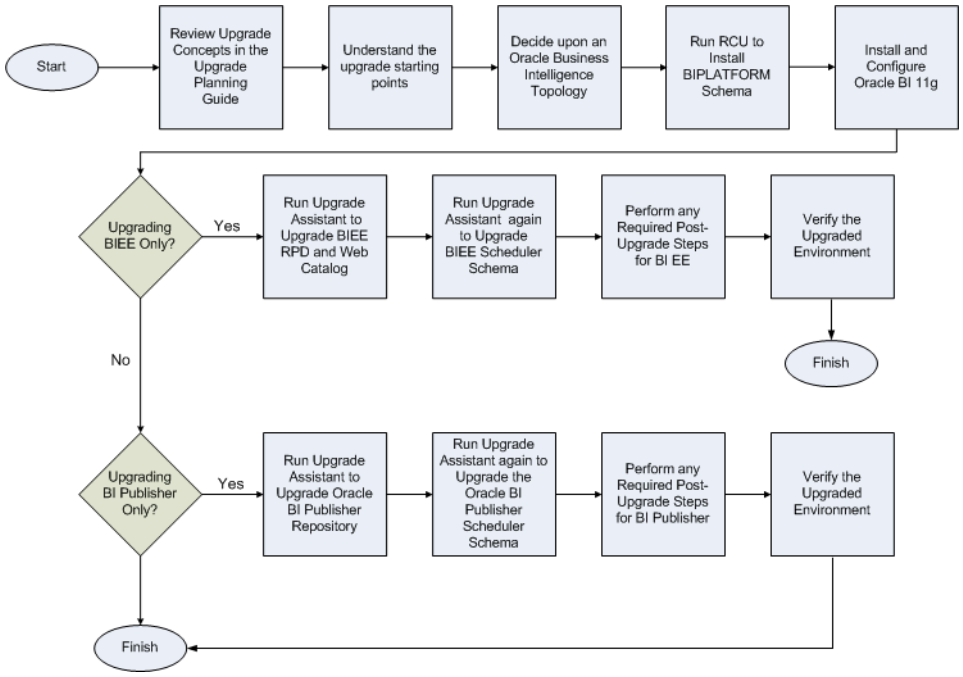
You cannot upgrade Oracle Real-Time Decisions using Upgrade Assistant. See the high-level procedures for upgrading Real-Time Decisions in Figure 1–2. For a road map of the procedure, see Table 1–3. For the Oracle Real-Time Decisions upgrade procedure, see Chapter 6, "Upgrading Oracle Real-Time Decisions."

1.2 Flow Chart of the Oracle Business Intelligence Upgrade Process

Figure 1–1 provides a flow chart of the Oracle Business Intelligence upgrade process. Review this chart to get familiar with the steps you will be required to take, based on your existing environment.

Figure 1–2 provides a flow chart of the Oracle Real-Time Decisions upgrade process. Review this chart to get familiar with the steps you will be required to take, based on your existing environment.

Figure 1–1 Flow Chart of the Oracle Business Intelligence Upgrade Process



This graphic shows a flow chart of the Oracle Business Intelligence upgrade process. Each step in the flow chart is described in Table 1–1 and Table 1–2.

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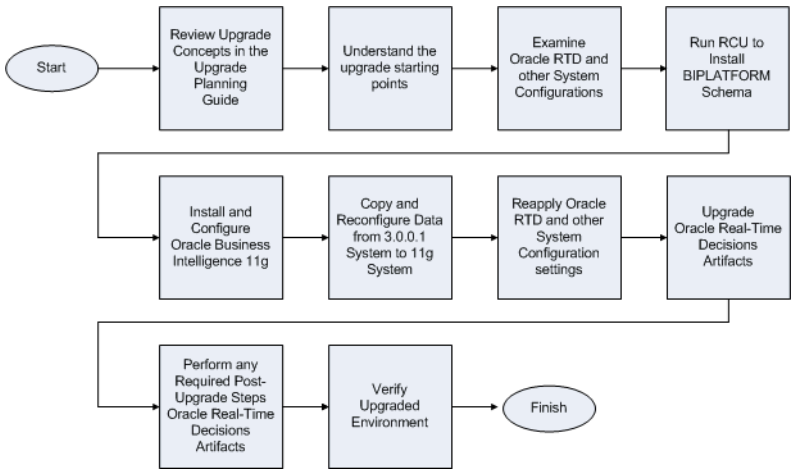
Figure 1–2 Flow Chart of the Oracle Real-TIme Decisions Upgrade Process



This graphic shows a flow chart of the Oracle Real-TIme Decisions upgrade process. Each step in the flow chart is described in Table 1–3.

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1.3 Table Describing the Steps in the Oracle Business Intelligence Enterprise Edition Upgrade Process

Table 1–1 describes each of the steps in the upgrade process flow chart for Oracle Business Intelligence Enterprise Edition, shown in Figure 1–1. The table also provides information on where to get more information on each step in the process.

Table 1–1 Table Describing the Steps in the Oracle Business Intelligence Enterprise Edition Upgrade Process

Step	Description	More Information
Review Upgrade Concepts in the *Oracle Fusion Middleware Upgrade Planning Guide*	The *Oracle Fusion Middleware Upgrade Planning Guide* provides a high-level overview of how to upgrade Oracle Fusion Middleware, including compatibility information and instructions for upgrading any databases that support your middleware components.	*Oracle Fusion Middleware Upgrade Planning Guide*
Understand the upgrade starting points	Before planning your upgrade, you should be familiar with the supported starting points for an Oracle Business Intelligence upgrade.	Task 1: Understand the Starting Points for Oracle Business Intelligence Enterprise Edition Upgrade
Decide upon an Oracle Business Intelligence Topology	Before you begin an upgrade, make sure you are familiar with the basic topologies in Oracle Business Intelligence 11*g*.	Task 2: Decide Upon an Oracle Business Intelligence Topology
Run RCU to Install BIPLATFORM Schema	Run the Repository Creation Utility to create the destination Oracle Business Intelligence 11*g* BIPLATFORM schema which can be on a different database instance than the 10*g* schema.	Task 3: Run RCU to Create the Destination BIPLATFORM Schemas
Install and Configure Oracle BI 11*g*	For upgrade purposes, only the **Simple** and **Enterprise** install options should be used. These options lead to the creation of an 11*g* configuration containing a domain with a single managed server instance.	Task 4: Install and Configure Oracle Business Intelligence Enterprise Edition 11g

Table 1–1 (Cont.) Table Describing the Steps in the Oracle Business Intelligence Enterprise Edition Upgrade Process

Step	Description	More Information
Run Upgrade Assistant to Upgrade Oracle BI EE RPD and Web Catalog	Upgrade Oracle Business Intelligence Enterprise Edition RPD and Web Catalog. If destination is on a different machine than the source, the source RPD and Web Catalog files must be accessible from the destination machine. When Prompted: ▪ Provide a pointer to source RPD file and Web Catalog directory as well as the password to be used for securing the destination RPD file. ▪ Provide destination WebLogic Server Administration Server information. This information must be on the same machine where the upgrade Assistant is running.	Task 5: Upgrade the Oracle Business Intelligence Enterprise Edition RPD and Web Catalog
Run Upgrade Assistant again to upgrade Oracle BI EE Scheduler schema	Upgrade Oracle Business Intelligence Enterprise Edition scheduler schema. When Prompted: ▪ Select the Oracle Business Intelligence Enterprise Edition Scheduler schema upgrade option. ▪ Provide source Business Intelligence Scheduler schema information, such as RDBMS type, connection string, and schema credentials. ▪ Provide destination BIPLATFORM schema information, such as schema name and credentials.	Task 6: Upgrade the Oracle Business Intelligence Enterprise Edition Scheduler Schema
Perform Any Required Post-Upgrade Manual Steps for Oracle BI EE	The Upgrade Assistant automates many of the upgrade tasks, but there are cases where you must manually modify the configuration settings after running the Upgrade Assistant.	Task 7: Perform Any Required Post-Upgrade Configuration Tasks
Verify the Upgraded Environment	Log in to the 11*g* Oracle BI EE system to verify the upgrade was successful.	Task 8: Verify the Oracle Business Intelligence Enterprise Edition Upgrade

1.4 Table Describing the Steps in the Oracle Business Intelligence Publisher Upgrade Process

Table 1–2 describes each of the steps in the upgrade process flow chart for Oracle Business Intelligence Publisher, shown in Figure 1–1. The table also provides information on where to get more information on each step in the process.

Table 1–2 Table Describing the Steps in the Oracle Business Intelligence Publisher Upgrade Process

Step	Description	More Information
Review Upgrade Concepts in the *Oracle Fusion Middleware Upgrade Planning Guide*	The *Oracle Fusion Middleware Upgrade Planning Guide* provides a high-level overview of how to upgrade Oracle Fusion Middleware, including compatibility information and instructions for upgrading any databases that support your middleware components.	*Oracle Fusion Middleware Upgrade Planning Guide*
Understand the upgrade starting points	Before planning your upgrade, you should be familiar with the supported starting points for an Oracle Business Intelligence upgrade.	Task 1: Understand the Starting Points for Oracle Business Intelligence Publisher Upgrade
Decide upon an Oracle Business Intelligence Topology	Before you begin an upgrade, make sure you are familiar with the basic topologies in Oracle Business Intelligence 11*g*.	Task 2: Decide Upon an Oracle Business Intelligence Topology
Run RCU to Install BIPLATFORM Schema	Run the Repository Creation Utility to create the destination BIPLATFORM schemas within the same, or a separate database instance from where the 10*g* schema exists. Note: If you have already run RCU to create the destination BIPLATFORM schema for Oracle Business Intelligence Enterprise Edition, you are not required to perform Task 3. Oracle BI EE and Oracle BI Publisher share the BIPLATFORM schema.	Task 3: Run RCU to Create the Destination BIPLATFORM Schemas
Install and Configure Oracle BI 11*g*	If you have already installed Oracle Business Intelligence Enterprise Edition, and selected the option to install BI Publisher, you are not required to perform Task 4.	Task 4: Install and Configure Oracle Business Intelligence Publisher 11g
Run Upgrade Assistant to upgrade Oracle BI Publisher Repository	Upgrade Oracle Business Intelligence Publisher repository. When Prompted: ■ Select the Oracle Business Intelligence Publisher repository upgrade option. ■ Provide 10*g* metadata repository or dataTemplate.xml (there could be multiple files) directory path. ■ Provides 11*g* metadata repository path.	Task 5: Upgrade the Oracle Business Intelligence Publisher Repository

Table 1–2 (Cont.) Table Describing the Steps in the Oracle Business Intelligence Publisher Upgrade

Step	Description	More Information
Run Upgrade Assistant again to Upgrade Oracle BI Publisher Scheduler Schema. Note: You can upgrade the repository and Scheduler Schema in any order.	Upgrade Oracle Business Intelligence Publisher Scheduler schemas. When Prompted: ▪ Select the Scheduler Schema Upgrade option. ▪ Provide source schema information: RDBMS type, connection string, schema credentials. ▪ Provide destination BIPLATFORM schema information: connection string, schema name and credentials.	Task 6: Upgrade the Oracle Business Intelligence Publisher Scheduler Schema
Perform Any Required Post-Upgrade Manual Steps for Oracle BI Publisher	The Upgrade Assistant automates many of the upgrade tasks, but there are cases where you must manually modify the configuration settings after running the Upgrade Assistant.	Task 7: Perform Any Required Post-Upgrade Configuration Tasks
Verify the Upgraded Environment	Log in to the 11*g* Oracle BI Publisher system to verify the upgrade was successful.	Task 8: Verify the Oracle Business Intelligence Publisher Upgrade

1.5 Table Describing the Steps in the Oracle Real-Time Decisions Upgrade Process

Table 1–3 describes each of the steps in the upgrade process flow chart for Oracle Real-Time Decisions, shown in Figure 1–2. The table also provides information on where to get more information on each step in the process.

Table 1–3 Table Describing the Steps in the Oracle Business Intelligence Publisher Upgrade Process

Step	Description	More Information
Review Upgrade Concepts in the *Oracle Fusion Middleware Upgrade Planning Guide*	The *Oracle Fusion Middleware Upgrade Planning Guide* provides a high-level overview of how to upgrade Oracle Fusion Middleware, including compatibility information and instructions for upgrading any databases that support your middleware components.	*Oracle Fusion Middleware Upgrade Planning Guide*
Understand the upgrade starting points	Before planning your upgrade, you should be familiar with the supported starting points for an Oracle Real-Time Decisions upgrade.	Task 1: Understand the Starting Points for Oracle Real-Time Decisions Upgrade
Examine Oracle RTD and other System Configurations	If you have customized your 3.0.0.1 Oracle Real-Time Decisions system with specific server-side configuration parameter values, examine and note down the customizations. If they have a direct equivalent, you will be able to replicate them later in your 11*g* upgraded system.	Task 2: Examine Oracle RTD and Other System Configuration Settings
Run RCU to Install BIPLATFORM Schema	Run the Repository Creation Utility to create the destination BIPLATFORM schemas within the same, or a separate database instance from where the 10*g* schema exists. If you have already run RCU to create the BIPLATFORM schema for Oracle BI EE, or Oracle BI Publisher, ignore this step.	Task 3: Run RCU to Create the Destination BIPLATFORM Schema
Install and Configure Oracle Business Intelligence 11*g*.	Installs Oracle Real-TIme Decisions 11*g* on the same machine as the 10*g* installation.	Task 4: Install and Configure Oracle Real-Time Decisions 11g
Copy and Reconfigure Data from the 3.0.0.1 System to 11*g* System	There are three broad categories of data that affect Oracle RTD users, and the upgrade considerations for each category are slightly different. The three categories are: ■ The SDDS database, that stores all the metadata required to run Oracle RTD ■ The model snapshot tables, which are optional ■ Enterprise data stored in external data sources, that are referenced by Inline Services	Task 5: Copy and Reconfigure Data from 3.0.0.1 System to 11g System
Reapply Oracle RTD and Other System Configuration Settings	If you had previously customized your Version 3.0.0.1 Oracle Real-Time Decisions system with specific server-side configuration parameter values, you will be able to reapply the settings that have a direct equivalent in 11*g*.	Task 6: Reapply Oracle RTD and Other System Configuration Settings

Table 1–3 (Cont.) Table Describing the Steps in the Oracle Business Intelligence Publisher Upgrade

Step	Description	More Information
Upgrade Oracle Real-Time Decisions Artifacts	Upgrade the existing Oracle RTD 3.0 artifacts	Task 7: Upgrade the Oracle Real-Time Decisions Artifacts
Perform Any Required Post-Upgrade Steps for Oracle Real-Time Decisions Artifacts	If you have Oracle RTD 3.0 clients, such as Java Smart Client, turn off web service security, and run the clients in the new 11*g* environment (this assumes you do not need web service security for the clients).	Task 8: Perform Any Required Post-Upgrade Configuration Tasks
Verify Upgraded Environment	To verify that your Oracle Real-Time Decisions upgrade was successful, run test integration points in your Inline Services, then log into Decision Center, and verify that your reports are visible.	Task 9: Verify the Oracle Real-Time Decisions Upgrade

2

Supported Starting Points for Oracle Business Intelligence Upgrade

Refer to the following sections for information about the supported starting points for upgrading to Oracle Business Intelligence 11*g*:

- Oracle Business Intelligence Enterprise Edition Supported Starting Points
- Oracle Business Intelligence Publisher Supported Starting Points
- Upgrading Oracle Real-Time Decisions

If you are already running Oracle Fusion Middleware 11*g*, refer to the *Oracle Fusion Middleware Patching Guide*, which provides information about applying the latest Oracle Fusion Middleware patches.

2.1 Oracle Business Intelligence Enterprise Edition Supported Starting Points

This guide documents the procedure for upgrading from Oracle Business Intelligence Enterprise Edition 10*g* Release 3 (10.1.3.2 or later) to Oracle Business Intelligence Enterprise Edition 11*g*.

2.2 Oracle Business Intelligence Publisher Supported Starting Points

This guide documents the procedure for upgrading from Oracle Business Intelligence Publisher 10*g* Release 3 (10.1.3.4 or later) to Oracle Business Intelligence Publisher 11*g*.

2.3 Upgrading Oracle Real-Time Decisions

This guide documents the procedure for upgrading from Oracle Real-Time Decisions 3.0.0.1 to Oracle Real-Time Decisions 11*g*.

3

Oracle Business Intelligence for 10*g* Users

The following sections introduce some key concepts of the Oracle Business Intelligence environment for 10*g* users.

3.1 Components of the Oracle Business Intelligence

Oracle Business Intelligence includes the following components:

- Oracle Business Intelligence Enterprise Edition
- Oracle Business Intelligence Publisher
- Oracle Real-Time Decisions

You can install one, two, or all three of these products, using Oracle Business Intelligence Installer. Oracle Business Intelligence Installer creates all the runtime components and the infrastructure for the products you choose to install. After running Oracle Business Intelligence Installer, the installed products share the same Oracle Fusion Middleware infrastructure in a single WebLogic domain.

"Differences between Oracle Business Intelligence 10*g* and 11*g* Releases" in the *Oracle Fusion Middleware Installation Guide for Oracle Business Intelligence*

3.2 Oracle Business Intelligence 11*g* Installation Types

Oracle Business Intelligence supports the following types of installation:

- Simple Installation
- Enterprise Installation
- Software Only Installation

When installing Oracle BI for upgrade, select **Enterprise Installation**. The Enterprise Installation type enables you to install Oracle Business Intelligence components for a new 11*g* enterprise deployment to which you upgrade your 10*g* data.

What gets installed?

The Enterprise installation type does one of the following, depending on which option you choose during the installation:

- New installation: Oracle Business Intelligence Installer installs the Oracle Business Intelligence components that you select.
- Scale out an existing installation: Oracle Business Intelligence Installer installs all Oracle Business Intelligence components.

Select **New installation** to install a new Oracle BI 11*g* deployment for upgrade.

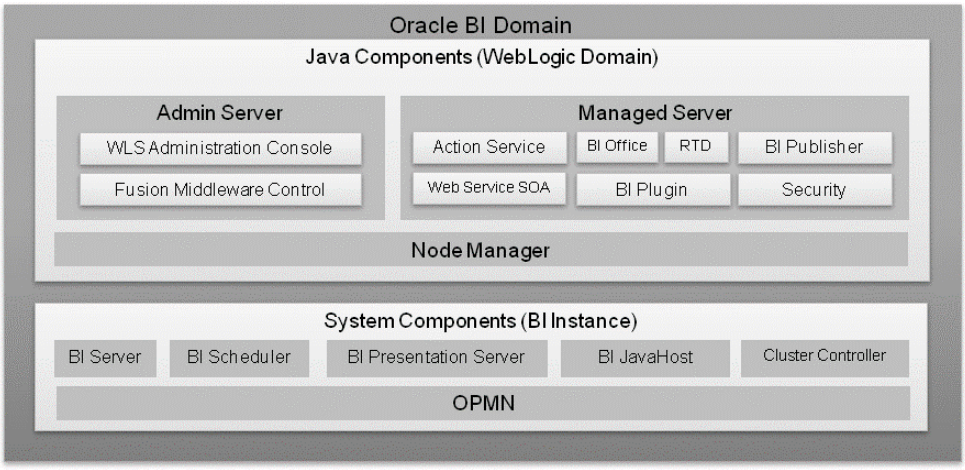
What gets configured?

For a New installation, Oracle Business Intelligence Installer configures the Oracle Business Intelligence components that you select and associates them with the Middleware, Oracle, and WebLogic Server homes that you specify.

3.3 Oracle Business Intelligence 11*g* Logical Architecture

Figure 3–1 provides the logical architecture for Oracle Business Intelligence after installation.

Figure 3–1 Oracle Business Intelligence Logical Architecture



This graphic provides a high-level view of the Oracle Business Intelligence architecture from the perspective of an Oracle Business Intelligence domain. The Oracle Business Intelligence domain contains three main components: a WebLogic domain, Oracle Business Intelligence System Components, and a database. Each main component is represented in its own rectangle contained within the Oracle Business Intelligence Domain rectangle. The Database component rectangle contains only a database, however the WebLogic domain and Oracle Business Intelligence System Components rectangles contain several subcomponents each.

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3.4 Oracle Business Intelligence and Oracle WebLogic Server

The most significant difference between Oracle Business Intelligence 10*g* and 11*g*, is the deployment to Oracle WebLogic Server, and the integration of Oracle Business Intelligence with Oracle Fusion Middleware.

For more information about Oracle Fusion Middleware Components, see Chapter 1, "Introduction to Oracle Fusion Middleware" in the *Oracle Fusion Middleware Administrator's Guide*.

Oracle WebLogic Server Middleware Home

Oracle Business Intelligence requires a Middleware home with Oracle WebLogic Server on your system. If your system does not already have Oracle WebLogic Server, you can install it in a new Middleware Home directory.

A Middleware home is a container for the Oracle WebLogic Server home, and, optionally, one Oracle Common home and one or more Oracle homes, with a directory structure like this:

```
/middleware_home
     wlserver_<version>
     jdk_<verion>
     oracle_common
     BI_ORACLE_HOME
     user_projects
```

The BI Oracle home contains the binary and library files necessary for Oracle BI. *BI_ORACLE_HOME* represents the BI Oracle home in path names.

The BI Oracle home can be associated with multiple Oracle WebLogic Server domains. The Oracle Common home contains the binary and library files required for Oracle Enterprise Manager 11*g* Fusion Middleware Control and Java Required Files (JRF).

A Middleware home can reside on a local file system or on a remote shared disk that is accessible through a network file system.

For more information about the structure and contents of a Middleware home, see "Understanding Oracle Fusion Middleware Concepts" in *Oracle Fusion Middleware Administrator's Guide*.

3.5 Oracle Business Intelligence Directory Structure

A typical Oracle Business Intelligence installation consists of a Fusion Middleware home and the following subdirectories:

- `wlserver_10.3`: The WebLogic Server home, which contains Java components, one Administration Server, and one or more Managed Servers.
- `oracle_home`: The Oracle Home contains binary and library files for Oracle BI.
- `oracle_common`: The Oracle Common Home contains the binary and library files required for Fusion Middleware Control and Java Required Files (JRF). There can be only one Oracle Common home within each Middleware home.

Figure 3–2 shows the directory structure of a typical Oracle Fusion Middleware installation on a single host, using all of the default values.

Figure 3–2 Typical Oracle Business Intelligence Directory Structure

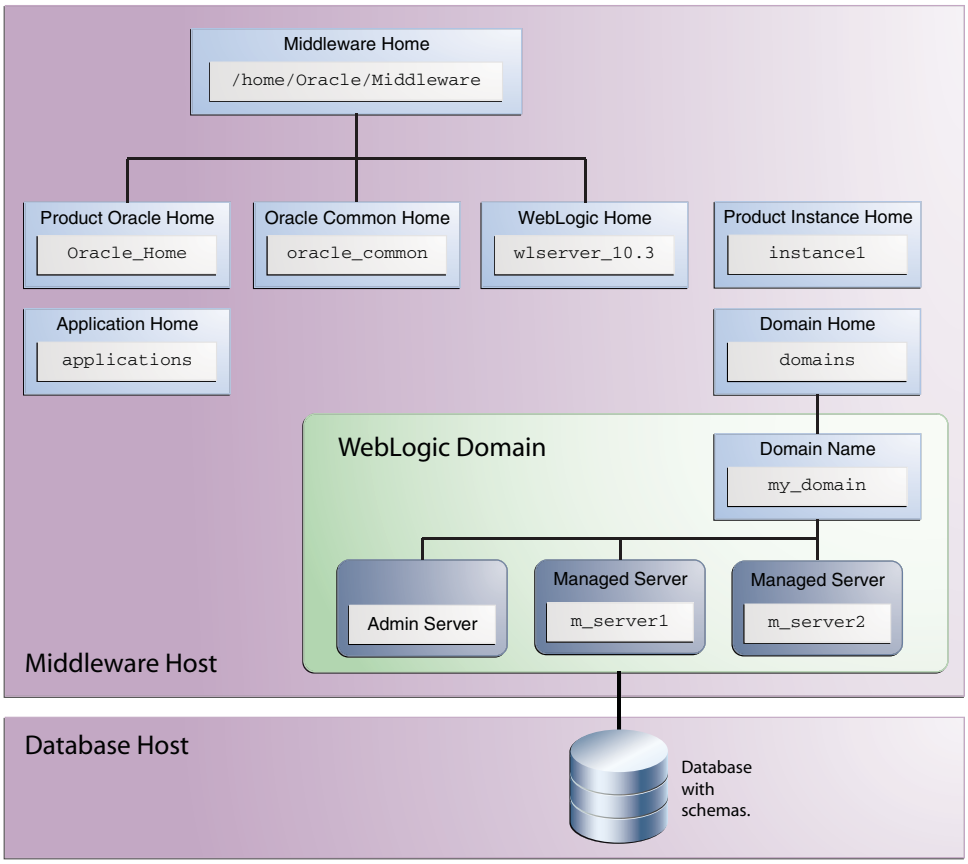

Figure 1-2 shows a typical Oracle Fusion Middleware directory structure in a Fusion Middleware home. At the top of the directory structure is the Middleware Home, which contains the Product Oracle Home, the Oracle Common Home, and the WebLogic Home. Notice the domains and instance directories are de-coupled from the MW_HOME and ORACLE_HOME.

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3.5.1 Changes to Oracle Business Intelligence Directory Structure

Table 3–1 describes the changes in directory structure from Oracle BI 10*g* to 11*g*.

Table 3–1 Oracle BI content changes

Directory or Files	10*g* Location	11*g* Location
AdminTool.sh equalizerpds.sh/equalizerpds.exe JobManager.sh MigrateEUL.sh NQClient.sh nqcmd.sh/nqcmd.exe	*BI_ORACLE_HOME*/server/Bin	*BI_ORACLE_HOME*/bifoundation/server/bin
DBFeatures.INI NQSConfig.INI	*BI_ORACLE_HOME*/server/Config	*ORACLE_INSTANCE*/config/OracleBIServerComponent/coreapplication_obis*n*

Table 3–1 (Cont.) Oracle BI content changes

Directory or Files	10*g* Location	11*g* Location
NQClusterConfig.INI	*BI_ORACLE_HOME*/server/Config	*ORACLE_INSTANCE*/config/OracleBIApplication/coreapplication
NQQuery.log NQSAdminTool.log NQServer.log	*BI_ORACLE_HOME*/server/Log	*ORACLE_INSTANCE*/diagnostics/logs/OracleBIServerComponent/coreapplication_obis1
Oracle BI Server repository directory: ■ SampleAppLite.rpd ■ paint.rpd	*BI_ORACLE_HOME*/server/Repository	*ORACLE_INSTANCE*/bifoundation/OracleBIServerComponent/coreapplication_obis*n*/repository
Samples: ■ order.xml ■ Product.xml ■ samplesales.udml	*BI_ORACLE_HOME*/server/Sample/samplesales	*ORACLE_INSTANCE*/bifoundation/OracleBIServerComponent/coreapplication_obis*n*/sample/SampleAppFiles
Usage Tracking: ■ SQL_Server_Time ■ UsageTracking.rpd ■ UsageTracking.zip	*BI_ORACLE_HOME*/server/Sample/usagetracking	*ORACLE_INSTANCE*/bifoundation/OracleBIServerComponent/coreapplication_obis*n*/sample/usagetracking
Other Schemas (for example): ■ Oracle_alter_nq_acct.sql ■ SAACCT.DB2.sql ■ SAACCT.MSSQL.sql ■ SAACCT.Oracle.sql Note: Use the Repository Creation Utility to install the Oracle BI Schema	*BI_ORACLE_HOME*/server/Sample/Schema	*ORACLE_INSTANCE*/bifoundation/OracleBIServerComponent/coreapplication_obis*n*/schema
■ credentialstore.xml ■ instanceconfig.xml (for Presentation Services) ■ userpref_currencies.xml	OracleBIData/web/config	*ORACLE_INSTANCE*/config/OracleBIPresentationServicesComponent/coreapplication_obips*n*
■ javahost ■ sawlog0.log	OracleBIData/web/log	*ORACLE_INSTANCE*/diagnostics/logs/OracleBIPresentationServicesComponent/coreapplication_obips*n*
catalogmanager.exe	*BI_ORACLE_HOME*\web\catalogmanager	*ORACLE_INSTANCE*\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips*n*\catalogmanager\runcat.cmd
instanceconfig.xml (for Oracle BI Scheduler)	OracleBIData\web\config	*ORACLE_INSTANCE*\config\OracleBISchedulerComponent\coreapplication_obisch*n*

Table 3–1 (Cont.) Oracle BI content changes

Directory or Files	10*g* Location	11*g* Location
▪ odbc.ini ▪ user.sh	BI_ORACLE_HOME/setup	*ORACLE_INSTANCE*/bifoundation/OracleBIApplication/coreapplication/setup

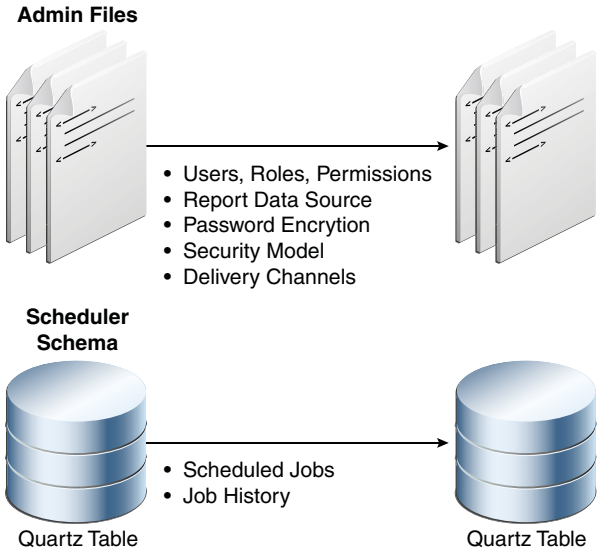
3.6 What Gets Upgraded?

This section describes the components that are upgraded by Upgrade Assistant, as well as the security model upgrade path.

3.6.1 Administration Files and Scheduler Schema Upgrade Flow

Figure 3–3 illustrates the Administration files and Scheduler schema components that are upgraded by Upgrade Assistant.

Figure 3–3 10g to 11g Report Catalog Upgrade Flow



This graphic shows Administration files and Scheduler schema components that are upgraded by Upgrade Assistant.

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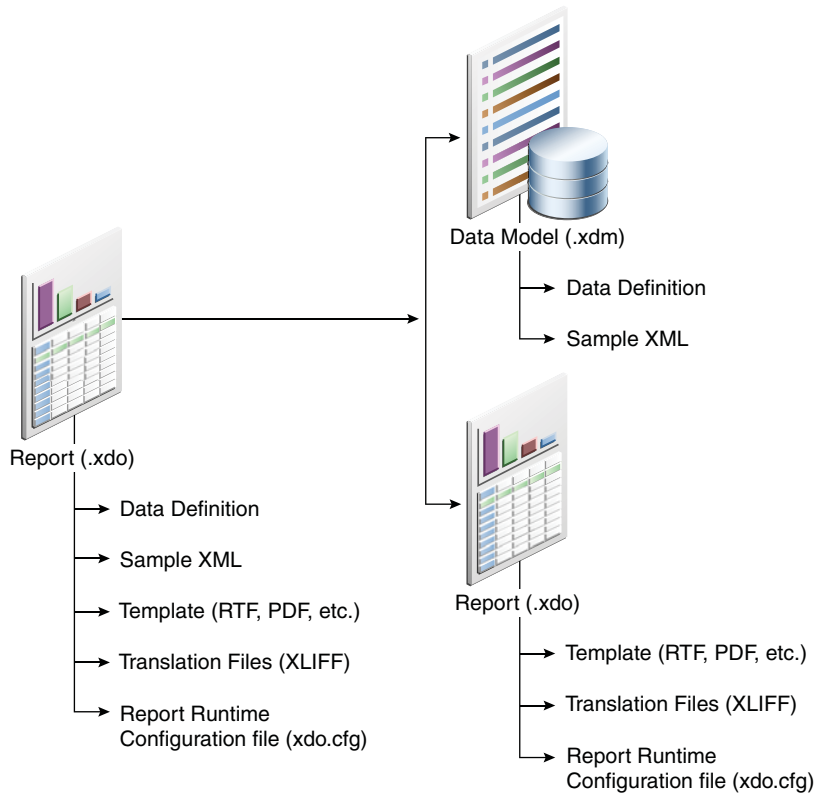
3.6.2 Report Catalog Upgrade Flow

Figure 3–4 illustrates the Report Catalog components upgraded by Upgrade Assistant.

Figure 3–4 Report Catalog Upgrade Flow



This graphic shows the Report Catalog components upgraded by Upgrade Assistant.

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3.6.3 Security Model Mapping for Oracle BI Publisher Upgrade

The following table shows security model mapping for an Oracle BI Publisher upgrade.

Table 3–2 Oracle BI Publisher Security Model Flow

10*g* Security Model	**11*g* Security Model**
BI Publisher	BI Publisher
BI Server	BI Server
LDAP	LDAP
Database	Database
Siebel Security	Siebel Security
E-Business Suite Security	E-Business Suite Security
Shared Services Security	Default (Oracle Fusion Middleware)

3.7 Comparing the Oracle Business Intelligence 10*g* and 11*g* Security Models

The security policy for Oracle Business Intelligence 11*g* defines what individual users and users with certain application roles can access and do. In Oracle Business Intelligence 11*g*, the security policy definition is split across the following:

- **Presentation Catalog** - this defines which catalog objects and Oracle BI Presentation Services functionality given users and application roles can access.
- **RPD** - this defines which application roles and users have access to which items of metadata within the RPD. You define this security policy in the Administration Console.
- **Policy Store** - this defines which Oracle Business Intelligence Server, Oracle Business Intelligence Publisher and Real Time Decisions functionality can be accessed by given users or users with given application roles. Use Oracle Enterprise Manager to configure the default Oracle Business Intelligence Policy Store.

Oracle Business Intelligence10*g* and 11*g* security models differ in the following areas:

- **Defining users and groups** - in Oracle Business Intelligence 10*g*, it was possible to define users and groups within a repository file using the Oracle BI Administration tool. In Oracle Business Intelligence 11*g*, you can no longer define users and groups within a repository. The Oracle Business Intelligence Enterprise Edition Upgrade Assistant migrates users and groups from a 10*g* repository into the embedded LDAP server in an 11*g* installation.
- **Defining security policies** - in Oracle Business Intelligence 10*g*, security policies in the Web catalog and repository can be defined to reference groups within a directory. In Oracle Business Intelligence 11*g*, security policies are defined in terms of application roles, which are in turn mapped to users and groups in a directory. This allows an Oracle Business Intelligence 11*g* system to be deployed without changes to the corporate directory and eases movement of artifacts between development, test and production environments.
- **Use of the Administrator user** - in an Oracle Business Intelligence 10*g* installation, a special user named, **Administrator** has full administrative permissions and is also used to establish trust between processes within that installation. In Oracle Business Intelligence 11*g* there is no special significance to the name Administrator and there can be one or more users who are authorized to undertake different sets of administrative functions. In Oracle Business Intelligence 11*g* the identity used to establish trust between processes in an installation is configurable and independent.
- **Repository encryption** - in Oracle Business Intelligence 10*g*, certain sensitive elements within a repository are encrypted. In Oracle Business Intelligence 11*g*, the entire repository is encrypted using a key derived from a user supplied password. An 11*g* repository can only be opened with the password, and there is no mechanism to recover a lost password.

The following aspects of the Oracle Business Intelligence 10*g* security model remain in 11*g*:

- **Oracle Business Intelligence Server Initialization Blocks** - Oracle Business Intelligence Server 11*g* continues to support the use of initialization blocks for authentication and authorization. In 10*g* Oracle Business Intelligence Server falls back to use initialization blocks if a matching user cannot be found in the repository. In 11*g* Oracle Business Intelligence falls back to use initialization blocks

if the user cannot be authenticated by the installation's configuration authentication provider.

- **Presentation Catalog Groups** - Oracle Business Intelligence 11*g* continues to support the definition of catalog groups within the presentation catalog. These groups are only visible within Oracle Business Intelligence Presentation Services. Oracle recommends that presentation catalog groups be used for backward compatibility only and that application roles be used instead for new installations.
- **SA System Subject Area** - Oracle Business Intelligence 11*g* supports the use of SA System Subject Area in combination with Oracle Business Intelligence Server initialization blocks to access user, group, and profile information stored in database tables.

For more information about Oracle Business Intelligence security, see the *Oracle Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition*.

4

Upgrading Oracle Business Intelligence Enterprise Edition

This chapter describes how to upgrade your existing Oracle Business Intelligence Enterprise Edition (Oracle BI EE) 10*g* Release 3 (10.3.2 or later) environment to Oracle Business Intelligence 11*g*.

This chapter contains the following sections:

4.1 Task 1: Understand the Starting Points for Oracle Business Intelligence Enterprise Edition Upgrade

For information about starting points for an Oracle Business Intelligence upgrade, see Chapter 2, "Supported Starting Points for Oracle Business Intelligence Upgrade." If you are running a version of Oracle Business Intelligence older than version specified in Chapter 2, you must upgrade to the supported starting point version before attempting to upgrade to 11*g*.

If you are already running Oracle Fusion Middleware 11*g*, refer to the *Oracle Fusion Middleware Patching Guide*, which provides information about applying the latest Oracle Fusion Middleware patches.

This guide provides instructions for upgrading from Oracle Business Intelligence 10*g* to the latest Oracle Business Intelligence 11*g*.

4.2 Task 2: Decide Upon an Oracle Business Intelligence Topology

To help you decide on a target topology for your Oracle Business Intelligence 11*g* deployment, see Chapter 3, "Oracle Business Intelligence for 10g Users." Chapter 3 compares 10*g* and 11*g* features, directory structures, and architecture. It also describes Oracle Business Intelligence 11*g* integration with Oracle WebLogic Server and Oracle Fusion Middleware applications.

4.3 Task 3: Run RCU to Create the Destination BIPLATFORM Schemas

The Repository Creation Utility (RCU) is a graphical tool for creating and managing Oracle Fusion Middleware database schemas.

Important screens when running RCU:

- **Database Connection Details** screen - Select the type of database on your system. This is the database in which you create the Oracle Business Intelligence schemas. Provide the necessary credentials for RCU to be able to connect to your database.
- **Select Components** screen - Near the top of the screen, select **Create a New Prefix**. The default prefix is **DEV**. You can provide another prefix, if preferred.

  Expand the Business Intelligence component group by clicking the plus sign (+) next to it. Then, click **Business Intelligence Platform** so that a check appears next to it. This action automatically selects the **Metadata Services (MDS)** schema (under the AS Common Schemas group), which is also required by Oracle Business Intelligence.

To create your Oracle Business Intelligence Enterprise Edition 11*g* destination schema, see "Create Database Schemas Using the Repository Creation Utility" in the *Oracle Fusion Middleware Installation Guide for Oracle Business Intelligence*.

4.4 Task 4: Install and Configure Oracle Business Intelligence Enterprise Edition 11*g*

Use Oracle Business Intelligence Installer to install Oracle Business Intelligence 11*g* components on Windows, Linux, and UNIX operating systems.

Important screens when running the Oracle Business Intelligence Installer:

- **Select Installation Type** screen - Select **Enterprise install for new installations**. This option Installs a new Oracle Business Intelligence system for a hosted deployment on one or more computers.
- **Create or Scale Out BI System** screen - Click **Create New BI System**.
- **Specify Installation Location** screen - Specify the Oracle Middleware home location.
- **Database Details** screen - Specify the database type, the database connection string, and the user name and password for the Business Intelligence Platform schema.

For installation and configuration instructions for Oracle Business Intelligence Enterprise Edition, see "Enterprise Install for New Installations" in the *Oracle Fusion Middleware Installation Guide for Oracle Business Intelligence*.

4.5 Task 5: Upgrade the Oracle Business Intelligence Enterprise Edition RPD and Web Catalog

Use the Oracle Fusion Middleware Upgrade Assistant to upgrade the Oracle Business Intelligence Enterprise Edition RPD and Web Catalog.

Before running Upgrade Assistant

Before running Upgrade Assistant configure `TNSNAMES.ora` in your 11*g* system so that it connects to any databases used by the RPD.

In addition, any custom changes to the Oracle BI EE 10*g* configuration files, for example, `instanceconfig.xml`, are not upgraded by Upgrade Assistant. You must manually edit the 11*g* configuration files to re-apply the customizations.

The following configuration changes may be necessary before running Upgrade Assistant:

1. Confirm any datasources used by your RPD are configured in the 11*g* system.
2. If you configured the `nqsconfig.ini` file in the 10*g* system for database authentication, you must copy over the same configurations to the 11*g* version of the files.

   For example, to add the following parameter in the `nqsconfig.ini` file for this type of authentication:

   ```
   SECURITY
   AUTHENTICATION_TYPE = DATABASE;
   DATABASE
   DATABASE = "mydb";
   ```

Admin Server and Managed Servers

The Admin Server and the Managed Server must remain running during the upgrade process.

Running Upgrade Assistant

Upgrade Assistant is installed automatically into the `bin` directory of your Oracle Fusion Middleware Oracle home. For information on the Oracle home, see Section 3.4, "Oracle Business Intelligence and Oracle WebLogic Server."

Note: The following sections describe how to use the Upgrade Assistant in graphical user interface mode. You can also use the Upgrade Assistant command line to perform these tasks.

For more information, see "Using the Upgrade Assistant Command-Line Interface" in the *Oracle Fusion Middleware Upgrade Planning Guide*.

Table 4–1 Running the Upgrade Assistant to Upgrade the Oracle BIEE RPD and Web Catalog

Step	Screen	Description and Action Required

1	None.	To start the Upgrade Assistant using the graphical user interface, change the directory to the *ORACLE_HOME*/bin directory of the Oracle Fusion Middleware installation:
		Note: If you have multiple RPDs, you must run Upgrade Assistant once for each RPD.
		For UNIX:
		`./ua`
		On a Windows operating system:
		`ua.bat`

2	Welcome Screen	Click **Next** to continue.
3	Specify Operation	Select **Upgrade Oracle BI RPD and Web Catalog**. Click **Next** to continue.
4	Specify Source Details	Enter the details for the source 10*g* BIEE RPD and Web Catalog. This could be in the existing 10*g* installation, or a copy made to a shared network location or USB drive: **Upgrade Repository (RPD)** **RPD File**: Enter the name of the RPD file. The RPD file (and Web catalog) can be copied from anywhere, for example, a USB drive, or direct from the 10*g* installation if it is on a shared drive. **Administrator User Name**: Enter the 10*g* Administrator User Name. Typically the name is `Administrator`. **Administrator Password**: Enter the 10*g* Administrator Password Enter the password which will be used to secure the upgraded 11*g* RPD (The RPD password does not have to match the Administrator or any other password). **Upgrade Web Catalog** **Web Catalog Directory**: Enter the name, or browse to the Web Catalog Directory. **Web Catalog Deliveries Directory**: In 10*g*, the `deliveries` directory is a special directory used for data such as Dashboard snapshots used by Briefing Books. The directory is called `deliveries` by default and is located in the *OracleBIData*/web/catalog directory. In many cases, the 10*g* directory is empty. If the 10*g* `deliveries` directory is not available, any empty directory named `deliveries`, can be given for upgrade. If the upgrade assistant finds a directory called `deliveries` in the same folder as the catalog, it is selected by default. Click **Next** to continue.

Table 4–1 (Cont.) Running the Upgrade Assistant to Upgrade the Oracle BIEE RPD and Web Catalog

Step	Screen	Description and Action Required
5	Specify WebLogic Server	Enter the following: ■ In the **Host** field is always `localhost` for this type of upgrade. ■ In the **Port** field, enter the server's port number, for example, **7001**. ■ In the **Username** field, enter the admin user name, for example, **weblogic**. ■ In the **Password** field, enter the password associated with the specified admin user. Click **Next** to continue.
6	Examining Components	During the examination process, Upgrade Assistant checks for the following: ■ The source directory exists. ■ The source directory is readable and contains a file for upgrade. ■ The destination directory exists. ■ Destination directory is writable and has sufficient space. Under the **Status** column, the word **succeeded** should appear. If instead, the word **failed** appears, inspect the log file for details. Click **Next** to continue.
7	Upgrade Summary	Click **Upgrade**.
8	Upgrading Components	The upgrade process begins, and is completed when the status bar reaches 100 percent. For an illustration of what gets upgraded, see Section 3.6, "What Gets Upgraded?." If there are errors during the upgrade, inspect the log file for details. The log files are located in the following directory: *BI_ORACLE_HOME*/upgrade/logs/ua<timestamp>.log For Windows Operating Systems: *BI_ORACLE_HOME*\upgrade\logs\ua<timestamp>.log Where <timestamp> is the current date and time. You can also check the component log files, in directories organized by component under *ORACLE_INSTANCE*\diagnostics\logs Click **Next** to continue.
9	Upgrade Complete	Click **Close**.

Note: Review the log for any errors or warnings. Resolve any errors or warnings in 10*g* files and resolve them manually in the upgraded 11*g* RPDs and Web Catalogs.

4.6 Task 6: Upgrade the Oracle Business Intelligence Enterprise Edition Scheduler Schema

Oracle BI EE 10*g* iBots are made up partly of xml files in the Web Catalog, and partly of scheduling information in the Scheduler schema. In order to complete the upgrade process, you must upgrade the Scheduler schema.

Use the Oracle Fusion Middleware Upgrade Assistant to upgrade the Oracle Business Intelligence Enterprise Edition Scheduler schema to the new BIPLATFORM schema.

Upgrade Assistant is installed automatically into the `bin` directory of your Oracle Fusion Middleware Oracle home.

Note: The following sections describe how to use the Upgrade Assistant in graphical user interface mode. You can also use the Upgrade Assistant command line to perform these tasks.

To see an online description of the Upgrade Assistant command line options type the following command:

```
ua -help
```

For more information, see "Using the Upgrade Assistant Command-Line Interface" in the *Oracle Fusion Middleware Upgrade Planning Guide*.

Upgrade Assistant performs the Scheduler schema upgrade by upgrading source schema content into the destination Oracle Business Intelligence Scheduler schema content.

Table 4–2 Running the Upgrade Assistant to Upgrade the Oracle BIEE Scheduler Schema

Step	Screen	Description and Action Required

1	None.	To start the Upgrade Assistant using the graphical user interface:
		Change the directory to the *ORACLE_HOME*`/bin` directory of the Oracle Fusion Middleware installation:
		For UNIX:
		`./ua`
		On a Windows operating system:
		`ua.bat`

2	Welcome	Click **Next** to continue.
3	Specify Operation	Select **Upgrade Oracle BI Scheduler Schema**. Click **Next** to continue.

Table 4–2 (Cont.) Running the Upgrade Assistant to Upgrade the Oracle BIEE Scheduler Schema

Step	Screen	Description and Action Required
4	Specify Source Database	Enter the details for the database that hosts the Oracle BI EE 10*g* Scheduler schema: **Database Types**: Select the database type from the drop-down list. **Connect String**: Enter the second portion of the connection string. Examples of the appropriate syntax for this field appear immediately below the field. **Source Schema**: Enter the name of the existing 10*g* schema/database/user. **Password**: Enter the password associated with the specified source schema. **DBA Username**: To log in as the Oracle SYS database account specify **SYS AS SYSDBA** in this field. **DBA Password**: Enter the password associated with the specified DBA Username. Click **Next** to continue.
5	Specify Target Database	Enter the details for the database that hosts the Oracle BI EE 11*g* BI Scheduler target database: **Target Database Types**: The target database type is based on the source database type. **Connect String**: Enter the second portion of the JdbcConnectionString. Examples of the appropriate syntax for this field appear immediately below the field. **Password**: Enter the password associated with the specified source schema. **DBA Username**: To log in as the Oracle SYS database account specify **SYS AS SYSDBA** in this field. **DBA Password**: Enter the password associated with the specified DBA Username. Click **Next** to continue.
6	Specify Schema Name	Enter the 11*g* BI schema name for the target database. **Schema Name**: Select BIPLATFORM schema from the drop-down list, which has a prefix that is defined when you create the schema with RCU. **Password**: Enter the password associated with the specified schema. Click **Next** to continue.
7	Examining Components	The Upgrade Assistant examines the components and checks that the source and target schemas contain the expected columns. Under the **Status** column, the word **succeeded** should appear. If instead, the word **failed** appears, inspect the log file for details. Click **Next** to continue.

Table 4–2 (Cont.) Running the Upgrade Assistant to Upgrade the Oracle BIEE Scheduler Schema

Step	Screen	Description and Action Required
8	Upgrade Summary	Click **Upgrade**.
9	Upgrading Components	The upgrade process begins, and is completed when the status bar reaches 100 percent. If there are errors during the upgrade, inspect the log file for details. The log files are located in the following directory: *BI_ORACLE_HOME*/upgrade/logs/ua<timestamp>.log For Windows Operating Systems: *BI_ORACLE_HOME*\upgrade\logs\ua<timestamp>.log Where <timestamp> is the current date and time. Click **Next** to continue.
10	Upgrade Complete	Click **Close**.

Note: Review the log for any errors or warnings. Resolve any errors or warnings in 10*g* files and resolve them manually in the upgraded 11*g* RPDs and Web Catalogs.

4.7 Task 7: Perform Any Required Post-Upgrade Configuration Tasks

Refer to Post-Upgrade Tasks and Considerations for Oracle Business Intelligence Enterprise Edition for a description of the post-upgrade tasks you might need to perform for Oracle Business Intelligence Enterprise Edition components.

Note: Check the final Upgrade Assistant screen for suggested manual upgrade steps.

4.8 Task 8: Verify the Oracle Business Intelligence Enterprise Edition Upgrade

You can verify that Oracle Business Intelligence Enterprise Edition has been upgraded successfully by logging into the 11*g* system to confirm that the Oracle Business Intelligence Enterprise Edition components are up and running.

You can also verify the upgrade using either of the following methods:

1. Run the Upgrade Assistant again and select **Verify Instance** on the Specify Operation page.

   Follow the instructions on the screen for information on how to verify that specific Oracle Fusion Middleware components are up and running.

2. Use the Fusion Middleware Control to verify that the Oracle Business Intelligence components are up and running.

   For more information, see "Getting Started Using Oracle Enterprise Manager Fusion Middleware Control" in the *Oracle Fusion Middleware Administrator's Guide*.

5

Upgrading Oracle Business Intelligence Publisher

This chapter describes how to upgrade your existing Oracle Business Intelligence Publisher 10*g* Release 3 (10.1.3.4 or later) environment to Oracle Business Intelligence Publisher 11*g*.

This chapter contains the following sections:

5.1 Task 1: Understand the Starting Points for Oracle Business Intelligence Publisher Upgrade

For information about starting points for an Oracle Business Intelligence Publisher upgrade, see Chapter 2, "Supported Starting Points for Oracle Business Intelligence Upgrade." If you are running a version of Oracle Business Intelligence Publisher older than version specified in Chapter 2, you must upgrade to the supported starting point version before attempting to upgrade to 11*g*.

If you are already running Oracle Fusion Middleware 11*g*, refer to the *Oracle Fusion Middleware Patching Guide*, which provides information about applying the latest Oracle Fusion Middleware patches.

This guide provides instructions for upgrading from Oracle Business Intelligence Publisher 10*g* to the latest Oracle Business Intelligence Publisher 11*g*.

5.2 Task 2: Decide Upon an Oracle Business Intelligence Topology

To help you decide on a target topology for your Oracle Business Intelligence 11*g* deployment, see Chapter 3, "Oracle Business Intelligence for 10g Users." Chapter 3 compares 10*g* and 11*g* features, directory structures, and architecture. It also describes

Oracle Business Intelligence Publisher 11*g* integration with Oracle WebLogic Server and Oracle Fusion Middleware applications.

For more information, see "Understanding Oracle Fusion Middleware Concepts" in the *Oracle Fusion Middleware Administrator's Guide*.

5.3 Task 3: Run RCU to Create the Destination BIPLATFORM Schemas

The Repository Creation Utility (RCU) is a graphical tool for creating and managing Oracle Fusion Middleware database schema in your database. To create your Oracle Business Intelligence Publisher 11*g* destination schema, see Create Database Schema Using the Repository Creation Utility in the *Oracle Fusion Middleware Installation Guide for Oracle Business Intelligence*.

Important screens when running RCU:

- **Database Connection Details** screen - Select the type of database on your system. This is the database in which you create the Oracle Business Intelligence schemas. Provide the necessary credentials for RCU to be able to connect to your database.
- **Select Components** screen - Near the top of the screen, select **Create a New Prefix**. The default prefix is **DEV**. You can provide another prefix, if preferred.

  Expand the Business Intelligence component group by clicking the plus sign (+) next to it. Then, click **Business Intelligence Platform** so that a check appears next to it. This action automatically selects the **Metadata Services (MDS)** schema (under the AS Common Schemas group), which is also required by Oracle Business Intelligence.

Note: If you have already run RCU to create the destination BIPLATFORM schema for Oracle Business Intelligence Enterprise Edition, you are not required to perform Task 3. Oracle BI EE and Oracle BI Publisher share the BIPLATFORM schema.

5.4 Task 4: Install and Configure Oracle Business Intelligence Publisher 11*g*

For installation instructions for Oracle Business Intelligence Publisher, see "Running the Installer" in the *Oracle Fusion Middleware Installation Guide for Oracle Business Intelligence*.

Important screens when running the Oracle Business Intelligence Installer:

- **Select Installation Type** screen - Select **Enterprise install for new installations**. This option Installs a new Oracle Business Intelligence system for a hosted deployment on one or more computers.
- **Create or Scale Out BI System** screen - Click **Create New BI System**.
- **Specify Installation Location** screen - Specify the Oracle Middleware home location.
- **Database Details** screen - Specify the database type, the database connection string, and the user name and password for the Business Intelligence Platform schema.

Note: If you have already installed Oracle Business Intelligence Enterprise Edition, and selected the option to install Oracle BI Publisher, you are not required to perform Task 4.

5.5 Task 5: Upgrade the Oracle Business Intelligence Publisher Repository

Use the Oracle Fusion Middleware Upgrade Assistant to upgrade the Oracle Business Intelligence Publisher Repository.

Note: You can upgrade Oracle Business Intelligence Publisher Repository and Scheduler schema in any order.

Before Running Upgrade Assistant

Before you start Upgrade Assistant follow these steps:

1. Back up the 10*g* and 11*g* repositories before running Upgrade Assistant.
2. Choose your upgraded Oracle BI Publisher 11*g* repository path. This can be same as your installed 11*g* repository path, for example, `\user_projects\domains\bifoundation_domain\config\bipublisher\repository`. It can also be a new path on the server, for example, `D:\MyUpgradedBIPRepository\repository`. If you choose a new path for the upgraded repository, copy the content of 11*g* repository to this new path.
3. When you install Oracle BI Publisher 11*g*, the catalog type is **Oracle BI EE Catalog**. In 10*g* the repository has always been a file-based repository (not Oracle BI EE Catalog). Upgrade Assistant provides a file based repository after upgrade. Therefore, change your catalog type to **Oracle BI Publisher - File System** before running Upgrade Assistant as follows:
   a. Before starting the upgrade, log in to the Oracle BI Publisher Administration page, navigate to the Server Configuration page, under the **Server Maintenance** section, change the **Catalog Type** to **Oracle BI Publisher - File System**.
   b. Enter the repository path. If you are using a new repository path for the upgraded repository, update the path, for example: `D:\MyUpgradedBIPRepository\repository`, for both the configuration folder path and the Oracle BI Publisher repository path in the catalog section.

   If you are using the default 11*g* repository path for upgrade, you can keep the default repository path for both the **Configuration Folder** and **BI publisher Repository Path**.

   Click the **Apply** button.
4. Stop the Managed Server on which Oracle BI Publisher is running.

Admin Server and Managed Servers

Before running Upgrade Assistant, shut down the Managed Server. The Admin Server should remain running.

For information on what is upgraded by Upgrade Assistant, see Section 3.6, "What Gets Upgraded?."

For a descriptions of the security model upgrade path, see Section 3.6.3, "Security Model Mapping for Oracle BI Publisher Upgrade."

Upgrade Assistant is installed automatically into the `bin` directory of your Oracle Fusion Middleware Oracle home.

Note: The following sections describe how to use the Upgrade Assistant in graphical user interface mode. You can also use the Upgrade Assistant command line to perform these tasks.

For more information, see "Using the Upgrade Assistant Command-Line Interface" in the *Oracle Fusion Middleware Upgrade Planning Guide*.

Table 5–1 Running the Upgrade Assistant to Upgrade the Oracle BI Publisher Repository

Step	Screen	Description and Action Required

1	None.	To start the Upgrade Assistant using the graphical user interface:
		Change directory to the *ORACLE_HOME*`/bin` directory of the Oracle Fusion Middleware installation:
		For UNIX:
		`./ua`
		On a Windows operating system:
		`ua.bat`

2	Welcome Screen	Click **Next** to continue.
3	Specify Operation	Select **Upgrade Oracle BI Publisher Repository**. Click **Next** to continue.
4	Specify Source Details	Select **Upgrade 10g BI Publisher Repository Directory** or **Upgrade E-Business Suite Data Template Directory**. For **Upgrade 10g BI Publisher Repository Directory**, enter, or browse to the **Repository Directory**. For **Upgrade E-Business Suite Data Template Directory**, enter, or browse to the **Data Template Directory**. **Note**: Upgrade Assistant does not support reading the data definition from the E-Business Suite environment. Store your data template XML files in a file system and run Upgrade Assistant to create an equivalent data model definition in the Oracle BI Publisher Enterprise Server. Click **Next** to continue.
5	Specify Destination Details	In the **Repository Directory** field, enter the destination 11*g* BI Publisher Repository directory if you selected the **10g BI Publisher Repository Directory** as your source directory. The default location of the destination repository is *MWHOME*\user_projects\domains\bifoundation_domain\config\bipublisher\repository. However, this destination repository path can be any path on the server. Enter the 11*g* data model directory if you selected the **E-Business Suite Data Template Directory** as your source. Click **Next** to continue.

Table 5–1 (Cont.) Running the Upgrade Assistant to Upgrade the Oracle BI Publisher Repository

Step	Screen	Description and Action Required
6	Specify WebLogic Server	Enter the following: ■ In the **Host** field, enter the WebLogic Admin Server's hostname, for example, localhost. ■ In the **Port** field, enter the server's port number, for example, **7001**. ■ In the **Username** field, enter the admin user name, for example, **weblogic**. ■ In the **Password** field, enter the password associated with the specified admin user. Click **Next** to continue.
7	Examining Components	During the examination process, Upgrade Assistant checks for the following: ■ The source directory exists. ■ The source directory is readable and contains a file for upgrade. ■ The destination directory exists. ■ Destination directory is writable and has sufficient space. Under the **Status** column, the word **succeeded** should appear. If instead, the word **failed** appears, inspect the log file for details. Click **Upgrade**.
8	Upgrade Summary	Click **Upgrade** to continue.
	Upgrading Components	The upgrade process begins, and is completed when the status bar reaches 100 percent. For an illustration of what gets upgraded, see Section 3.6, "What Gets Upgraded?." If there are errors during the upgrade, inspect the log file for details. The log files are located in the following directory: *BI_ORACLE_HOME*/upgrade/logs/ua<timestamp>.log For Windows Operating Systems: *BI_ORACLE_HOME*\upgrade\logs\ua<timestamp>.log Where <timestamp> is the current date and time. Click **Next** to continue.
9	Upgrade Complete	Click **Close**.

Note: Review the log for any errors or warnings. Resolve any errors or warnings in 10*g* files and resolve them manually in the upgraded 11*g* RPDs and Web Catalogs.

5.6 Task 6: Upgrade the Oracle Business Intelligence Publisher Scheduler Schema

Use the Oracle Fusion Middleware Upgrade Assistant to upgrade the Oracle Business Intelligence Publisher Scheduler schema.

Upgrade Assistant is installed automatically into the `bin` directory of your Oracle Fusion Middleware Oracle home.

Note: You can upgrade Oracle Business Intelligence Publisher Repository or Scheduler schema in any order.

Upgrade Assistant performs the schema upgrade by upgrading source Oracle Business Intelligence Publisher Scheduler schema content into the destination Oracle Business Intelligence Publisher Scheduler schema content.

Table 5–2 Running the Upgrade Assistant to Upgrade the Oracle BI Publisher Scheduler Schema

Step	Screen	Description and Action Required

1	None.	To start the Upgrade Assistant using the graphical user interface:
		Change directory to the *ORACLE_HOME*/bin directory of the Oracle Fusion Middleware installation:
		For UNIX:
		`./ua`
		On a Windows operating system:
		`ua.bat`

2	Welcome	Click **Next** to continue.
3	Specify Operation	Select **Upgrade Oracle BI Publisher Scheduler Schema**. Click **Next** to continue.
4	Specify Source Database	Enter the details for the database that hosts the Oracle BI Publisher 10*g* Scheduler: **Database Types**: Select the database type from the drop-down list. **Connect String**: Enter the second portion of the connection string. Examples of the appropriate syntax for this field appear immediately below the field. **Source Schema**: Enter the name of the existing 10*g* schema/database/user. **Password**: Enter the password associated with the specified source schema. **DBA Username**: To log in as the Oracle SYS database account specify **SYS AS SYSDBA** in this field. **DBA Password**: Enter the password associated with the specified DBA Username. Click **Next** to continue.

Table 5–2 (Cont.) Running the Upgrade Assistant to Upgrade the Oracle BI Publisher Scheduler Schema

Step	Screen	Description and Action Required
5	Specify Target Database	Enter the details for the database that hosts the Oracle Fusion Middleware 11*g* BI Publisher Scheduler target database: **Target Database Types**: The target database type is based on the source database type. **Connect String**: Enter the second portion of the connection string. Examples of the appropriate syntax for this field appear immediately below the field. **Password**: Enter the password associated with the specified source schema. **DBA Username**: To log in as the Oracle SYS database account specify **SYS AS SYSDBA** in this field. **DBA Password**: Enter the password associated with the specified DBA Username. Click **Next** to continue.
6	Specify Schema Name	Enter the 11*g* BI Publisher schema name from the drop-down list. **Schema Name**: Select BIPLATFORM schema from the drop-down list, which has a prefix that is defined when you create the schema with RCU. **Password**: Enter the password associated with the specified schema. Click **Next** to continue.
7	Examining Components	The Upgrade Assistant examines the following: ▪ The database connection ▪ The tables exists ▪ Whether the schema has already been upgraded Under the **Status** column, the word **succeeded** should appear. If instead, the word **failed** appears, inspect the log file for details. Click **Next** to continue.
8	Upgrade Summary	Click **Upgrade**.
9	Upgrading Components	The upgrade process begins, and is completed when the status bar reaches 100 percent. If there are errors during the upgrade, inspect the log file for details. The log files are located in the following directory: *BI_ORACLE_HOME*/upgrade/logs/ua<timestamp>.log For Windows Operating Systems: *BI_ORACLE_HOME*\upgrade\logs\ua<timestamp>.log Where <timestamp> is the current date and time. Click **Next** to continue.
10	Upgrade Complete	Click **Close**.

Note: Review the log for any errors or warnings. Resolve any errors or warnings in 10*g* files and resolve them manually in the upgraded 11*g* RPDs and Web Catalogs.

5.7 Task 7: Perform Any Required Post-Upgrade Configuration Tasks

Refer to Post-Upgrade Tasks and Considerations for Oracle Business Intelligence Publisher for a description of the post-upgrade tasks you might need to perform for each of the Oracle Business Intelligence Publisher components.

5.8 Task 8: Verify the Oracle Business Intelligence Publisher Upgrade

To verify that your Oracle Business Intelligence Publisher upgrade was successful see Section 4.8, "Task 8: Verify the Oracle Business Intelligence Enterprise Edition Upgrade."

6

Upgrading Oracle Real-Time Decisions

This chapter describes how to upgrade your existing Oracle Real-Time Decisions 3.0.0.1 environment to Oracle Real-Time Decisions 11*g*.

This chapter contains the following sections:

6.1 Task 1: Understand the Starting Points for Oracle Real-Time Decisions Upgrade

For information about starting points for an Oracle Business Intelligence upgrade, see Chapter 2, "Supported Starting Points for Oracle Business Intelligence Upgrade."

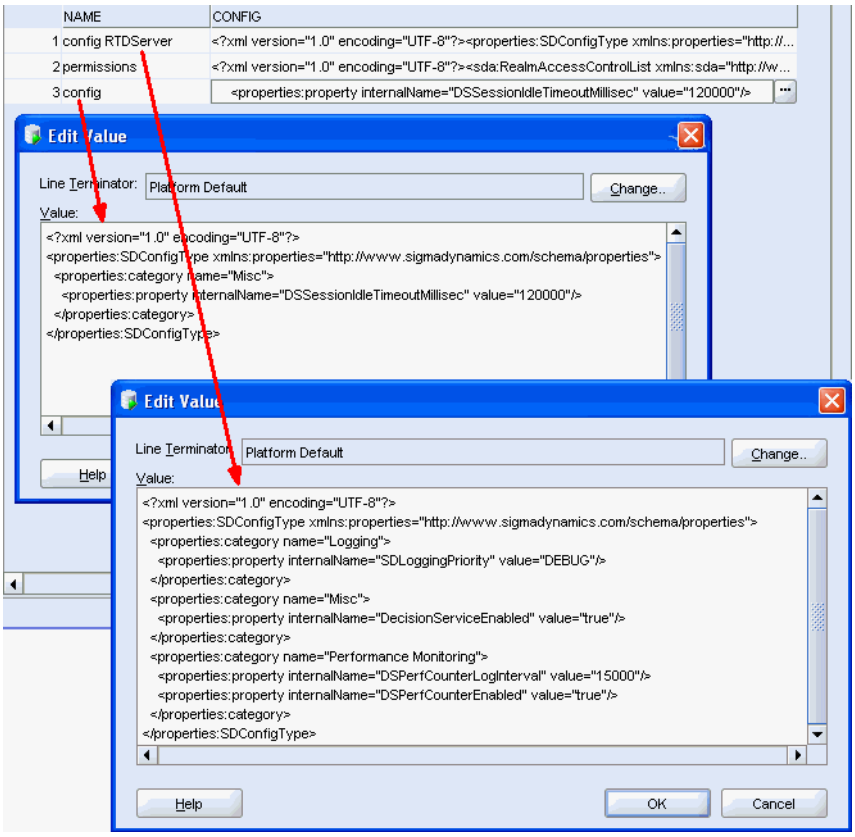
If you are already running Oracle Fusion Middleware 11*g*, refer to the *Oracle Fusion Middleware Patching Guide*, which provides information about applying the latest Oracle Fusion Middleware patches.

This guide provides instructions for upgrading from Oracle Real-Time Decisions Version 3.0.0.1 to the latest Oracle Real-Time Decisions 11*g*.

6.2 Task 2: Examine Oracle RTD and Other System Configuration Settings

If you have customized your 3.0.0.1 Oracle Real-Time Decisions system with specific server-side configuration parameter values, examine and note down the customizations. If they have a direct equivalent, you can replicate them later in your 11*g* upgraded system.

The customized Oracle RTD server-side configuration settings appear in the Oracle RTD SDConfig table, as shown in the following image.



Note: The Config values for the Name="config" row show the Oracle RTD configuration parameters set at the cluster level, the values for the Name="config *<server_name>*" rows show the parameters for the server level.

You may also have created special configuration settings at the application server level, such as JDBC data source settings, JVM parameters, and memory configuration parameters. Note down any configuration settings that you want to be used, exactly or in an equivalent way, in your upgraded system.

6.3 Task 3: Run RCU to Create the Destination BIPLATFORM Schema

The Repository Creation Utility (RCU) is a graphical tool for creating and managing Oracle Fusion Middleware database schema in your database. To create your Oracle Business Intelligence Enterprise Edition 11*g* destination BIPLATFORM schema, see "Additional Oracle BI Installer Requirements" in the *Oracle Fusion Middleware Installation Guide for Oracle Business Intelligence*.

Note: If you have already run RCU to create the destination BIPLATFORM schema for Oracle BI EE, or Oracle BI Publisher, you are not required to perform Task 3. Oracle BI EE, Oracle BI Publisher, and Oracle Real-Time Decisions share the BIPLATFORM schema.

6.4 Task 4: Install and Configure Oracle Real-Time Decisions 11*g*

For installation and configuration instructions for Oracle Business Intelligence Enterprise Edition, see "Running the Installer" in the *Oracle Fusion Middleware Installation Guide for Oracle Business Intelligence*.

6.5 Task 5: Copy and Reconfigure Data from 3.0.0.1 System to 11*g* System

There are three broad categories of data that affect Oracle RTD users, and the upgrade considerations for each category are slightly different. The three categories are:

- The SDDS database, which stores all the metadata required to run Oracle RTD
- The model snapshot tables, which are optional
- Enterprise data stored in external data sources, which are referenced by Inline Services

This procedure includes the following assumptions:

- You have an existing 3.0.0.1 SDDB database.
- You have an existing set of 3.0.0.1 model snapshot tables.
- You have an existing Oracle RTD 11*g* schema that contains both SDDB tables and model snapshot tables (default installation setup).
- The upgraded Oracle RTD 11*g* system will continue to reference the same external enterprise data used by Oracle RTD 3.0.0.1.

Note: For convenience, all three categories of data upgrade are described in this section, though you do not need to upgrade all the types of data at the same time.

Typically, you upgrade the SDDS database first, then the external enterprise data and model snapshot tables when you need to use them.

SDDS Database

For the SDDS database, copy the existing Oracle RTD 3.0.0.1 database using scripts located in the *RTD_HOME*\scripts\sql*db_type*, where *db_type* is either Oracle, SQL Server, or DB2, as follows:

To upgrade the Oracle RTD schema:

1. In the *RTD_HOME*\scripts\sql*db_type* folder, read the "readme" for your database.
2. Set up any objects (such as database links) that the readme indicates.
3. Run the `CopyRTDSDDBData.sq` script to copy the 3.0.0.1 SDDB data to the 11*g* database.

External Database Tables and Model Snapshot Tables

For the external data sources referenced in your Inline Services, you should check your 3.0.0.1 data sources defined in WebLogic Server Administration Console. The JDBC data sources to be recreated in 11*g* are the ones for model snapshots (assuming the

3.0.0.1 production model snapshots were created in a non-SDDS database), and the JDBC data sources referenced in your Inline Services.

To create new JDBC data sources and register them with Oracle RTD, follow the steps described in "Configuring Data Access for Oracle Real-Time Decisions" in *Oracle Fusion Middleware Administrator's Guide for Oracle Real-Time Decisions*.

For model snapshots, Oracle recommends setting up the model snapshot tables in a different schema from the SDDB tables. For more information, see "Setting Up and Using Model Snapshots" in *Oracle Fusion Middleware Administrator's Guide for Oracle Real-Time Decisions*.

There are two options for generating contents into your 11*g* model snapshot tables:

- Copy the content from the 3.0.0.1 model snapshot tables to the 11*g* model snapshot tables using the `CopyRTDSnapshotData.sql` script in the *RTD_HOME*\scripts\sql\db_type folder.
- Once the 11*g* RTD server has been configured and started, the content of the 11*g* model snapshot tables can be recreated using RTD Mbeans in Oracle Fusion Middleware Control.

6.6 Task 6: Reapply Oracle RTD and Other System Configuration Settings

If you had previously customized your Version 3.0.0.1 Oracle Real-Time Decisions system with specific server-side configuration parameter values, you can reapply the settings that have a direct equivalent in 11*g*. Generally, these are parameters which were set up in JConsole, whose equivalents can be accessed through Oracle RTD MBeans in Oracle Fusion Middleware Control. System parameters set up for specific customizations can also be reapplied if still required.

6.7 Task 7: Upgrade the Oracle Real-Time Decisions Artifacts

To upgrade the existing Oracle RTD 3.0 artifacts:

1. Backup the existing 3.0.0.1 Inline Services.
2. Open the Inline Services in the Oracle RTD 11*g* Decision Studio. Ensure that you have created and configured JDBC data sources and JDBC data source references correctly. If there are any errors, correct them.
3. Recompile the 11*g* Inline Services in Decision Studio. For each Inline Service, from the Decision Studio menu, select **Project**, then **Clean.**

Note: In version 3.0.0.1, Inline Services were protected by a combination of cluster permissions and explicit Inline Service permissions. In 11*g*, no permissions are defined in the Inline Service - all permissions are created and configured through permission grants in application policies in a policy store.

You may need to examine any 3.0.0.1 custom roles that you set up in 3.0.0.1 to control Inline Service access and create equivalent application roles and permissions in 11*g*. For more details, see the Security chapter in *Oracle Fusion Middleware Administrator's Guide for Oracle Real-Time Decisions*.

6.8 Task 8: Perform Any Required Post-Upgrade Configuration Tasks

If you have Oracle RTD 3.0 clients, such as Java Smart Client, turn off web service security, and run the clients in the new 11*g* environment (this assumes you do not need Web service security for the clients).

If you do need Web service security activated, update your clients as described in Appendix B, "Oracle RTD Web Services and Clients" of the *Oracle Fusion Middleware Administrator's Guide for Oracle Real-Time Decisions*, and the chapter appropriate to your client type in "Part II - Integration with Oracle RTD" in *Oracle Fusion Middleware Platform Developer's Guide for Oracle Real-Time Decisions*.

As with Inline Service security, in general, you may need to examine any 3.0.0.1 custom roles that you set up in 3.0.0.1, and create equivalent application roles and permissions in 11*g*. For more details, see the Security chapter in *Oracle Fusion Middleware Administrator's Guide for Oracle Real-Time Decisions*

6.9 Task 9: Verify the Oracle Real-Time Decisions Upgrade

To verify that your Oracle Real-Time Decisions upgrade was successful, run test integration points in your Inline Services, then log into Decision Center, and verify that your reports are visible.

7

Oracle Business Intelligence Post-Upgrade Tasks and Considerations

This chapter describes post-upgrade tasks and considerations for an Oracle Business Intelligence upgrade.

- Post-Upgrade Tasks and Considerations for Oracle Business Intelligence Enterprise Edition
- Post-Upgrade Tasks and Considerations for Oracle Business Intelligence Publisher

7.1 Post-Upgrade Tasks and Considerations for Oracle Business Intelligence Enterprise Edition

This section describes post-upgrade tasks and considerations for Oracle Business Intelligence Enterprise Edition (Oracle BI EE).

7.1.1 Agents are Not Scheduled

Oracle Business Intelligence Agents (iBots in 10*g*) with a schedule in 10*g*, will not have the same schedule in 11*g* until the schema has been imported, or the Agent is re-scheduled by selecting a schedule and saving it in 11*g*.

After the Scheduler schema has been upgraded, you must use Enterprise Manager to verify that the Scheduler is configured to use the upgraded schema. Without this verification, when you edit an Agent, its schedule becomes disabled.

7.1.2 Post-Upgrade Configurations

Manually copy the following files, paths, style sheets, and skins from the Oracle BI EE 10*g* installation to the Oracle BI EE 11*g* installation. You can also use Oracle Enterprise Manager to refer the 11*g* installation to the 10*g* files.

> **Note:** These steps apply only if you have made modifications to these files in 10*g* (which are all optional).

- Scheduler script path
- Scheduler Default script path
- OBIPS User pref currencies config file
- OBIPS PDF font map file

- Javahost user config file (Move the specific configuration you require, not the entire file.)
- Javahost scheduler user jar file path
- Language specific custom messages

Note: In order to follow the Oracle standard internationalization naming convention, some of the directories that contain language-dependent message files have been modified. following table lists the message file directory names that have been changed between Oracle BI EE 10*g* and 11*g*.

10*g* Name	11*g* Name
l_zh	l_zh-C
l_zh-tw	l_zh-TW (not applicable for Windows installations)
l_pt-br	l_pt-BR (not applicable to Windows installations)
l_iw	l_he

7.1.3 Ensure all Data Source Paths and System Variables are Accurate

After running Upgrade Assistant to upgrade an Oracle BI EE RPD, be sure that Connection Pools in the 11*g* environment are still pointing to the correct data source. In the case of xml data sources, be aware that the path to the source xml is held against each table definition in the physical layer, rather than at the connection pool level.

7.1.4 Upgrading a Cluster

You cannot upgrade an entire Oracle BI EE cluster. If you require a clustered 11*g* deployment, perform a simple installation and upgrade to that single instance before scaling out.

For information about scaling out an Oracle BI EE deployment, see "Extending and Scaling Your Deployment" in the *Oracle Fusion Middleware System Administrator's Guide for Oracle Business Intelligence Enterprise Edition*.

7.1.5 Upgraded RPDs and Web Catalog

After upgrading your Oracle BI EE RPDs and catalog, consider the following:

- Your 11*g* system will use the upgraded RPDs and catalog.
- Existing catalogs of the same name are renamed.
- RPDs are given a unique version number as they are added to the system so that any existing RPDs are not overwritten.

7.1.6 Authentication for External Users

Users migrated from the RPD into WebLogic LDAP derive their application role memberships directly from the Policy Store, which can be managed within Oracle Enterprise Manager. However, users that exist in an external user population, and are authenticated using an *Authentication* Init Block, derive their application role memberships from the ROLES (or GROUP) session variable that is set in response to a database query within an *Authorization* Init Block. To ensure consistent behavior for

any given user, ensure that each user exists in only one place. Therefore, any users migrated from the RPD into WebLogic LDAP should be removed from your external user population.

7.2 Post-Upgrade Tasks and Considerations for Oracle Business Intelligence Publisher

This section describes post-upgrade tasks and considerations for Oracle Business Intelligence Publisher (Oracle BI Publisher).

7.2.1 Restart the Managed Server

Before restarting the Managed Server - If the 10*g* security model is Oracle BI Server, after the upgrade to 11*g*, the security model is set to Oracle BI Server. Therefore, you must manually change the Oracle BI Server name (or IP Address) in `xmlp-server-config.xml` file located in the `repository/Admin/Configuration` folder.

Restart the Managed Server that runs the Oracle BI Publisher instance. Once the server is running, you can log in with a 10*g* user ID and password.

The repository is a file system, therefore the integrated environment does not work. In this case, log in to the following URL:

http://*servername:port*/*xmlpserver*

If you cannot log in with a 10*g* user ID and password, you can log in with the superuser ID and password.

7.2.2 Upgrading the File-Based Repository to the BI Web Catalog

After the upgrade process, a file-based repository upgraded to the BI Web Catalog (for BI Server Security Model) is required, use the utility from Oracle BI Publisher Administration Page under **Server Configuration** in **Catalog** section.

A

Oracle Business Intelligence Upgrade Assistant Screens

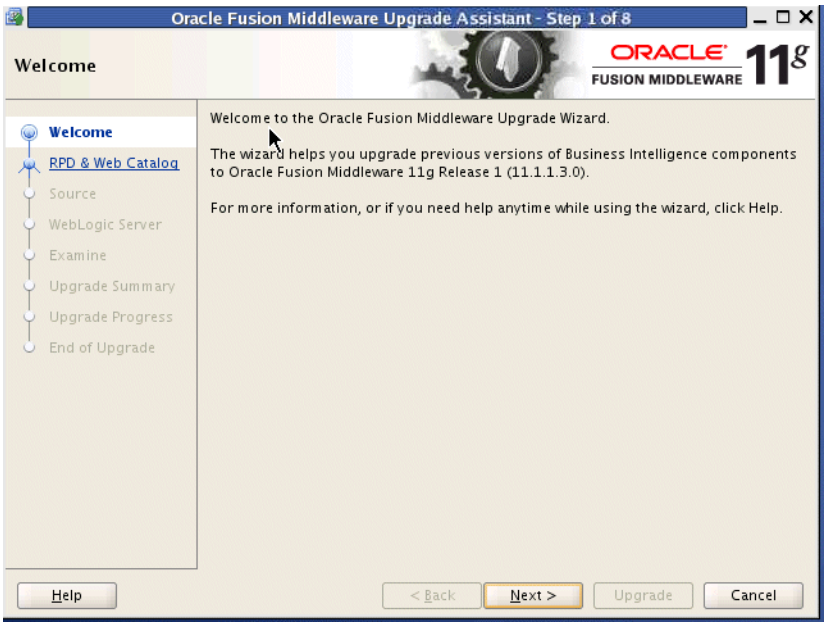
When upgrading Oracle Business Intelligence, you can use Upgrade Assistant To upgrade Oracle Business Intelligence Enterprise Edition (Oracle BI EE) or Oracle Business Intellegence Publisher (Oracle BI Publisher). The procedures for upgrading Oracle BI EE or Oracle BI Publisher are documented in Chapter 4, "Upgrading Oracle Business Intelligence Enterprise Edition," and Chapter 5, "Upgrading Oracle Business Intelligence Publisher.".

Upgrade Assistant does not support upgrading Oracle Real-Time Decisions (Oracle RTD). To upgrade your Oracle RTD environment, see Chapter 6, "Upgrading Oracle Real-Time Decisions.".

A.1 Upgrade Assistant Screens for an Oracle BI EE RPD and Web Catalog Upgrade

This section shows the Upgrade Assistant screens for an Oracle BI EE RPD and Web Catalog upgrade.

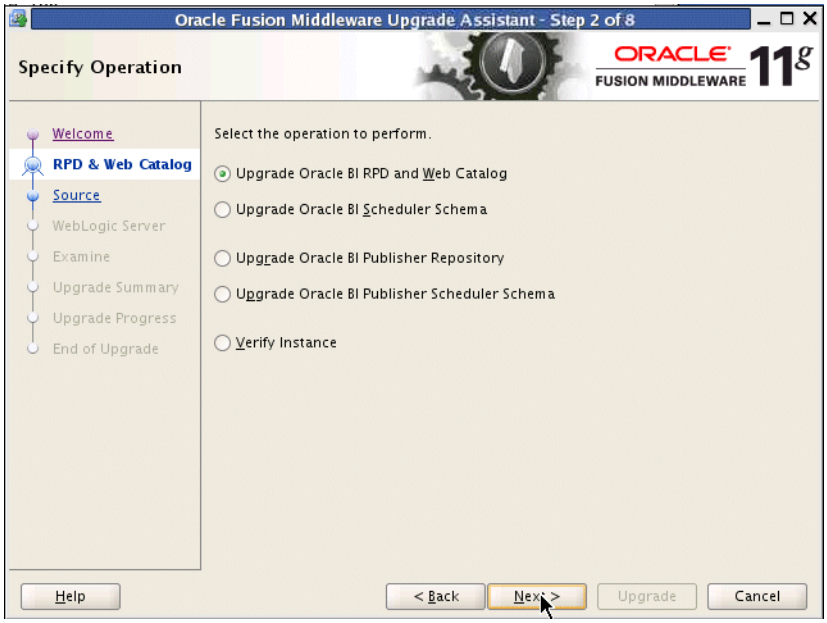
A.1.1 Welcome Screen



This graphic is a screen capture of the Oracle Fusion Middleware Upgrade Assistant Welcome screen. This screen introduces you to the Upgrade Assistant; it contains no input fields.

****

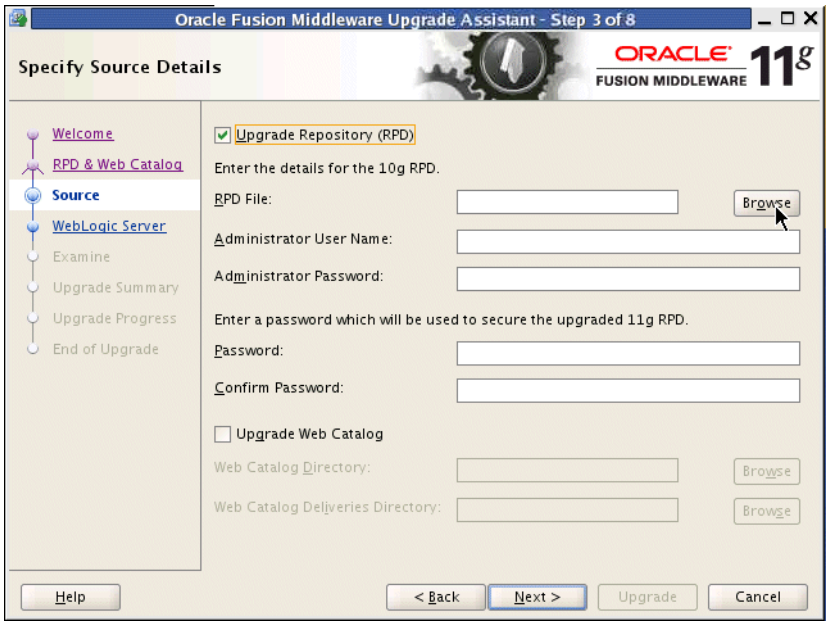
A.1.2 Specify Operation



This graphic is a screen capture of the Specify Operation screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition RPD and Web Catalog upgrade procedure.

****

A.1.3 Specify Source Details



This graphic is a screen capture of the Specify Source Details screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition RPD and Web Catalog upgrade procedure.

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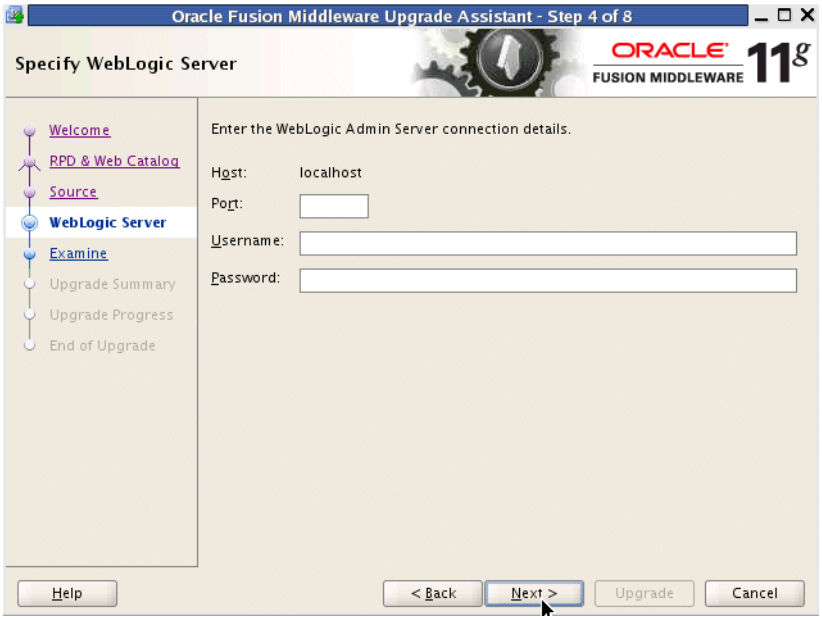
A.1.4 Specify WebLogic Server



This graphic is a screen capture of the Specify WebLogic Server screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition RPD and Web Catalog upgrade procedure.

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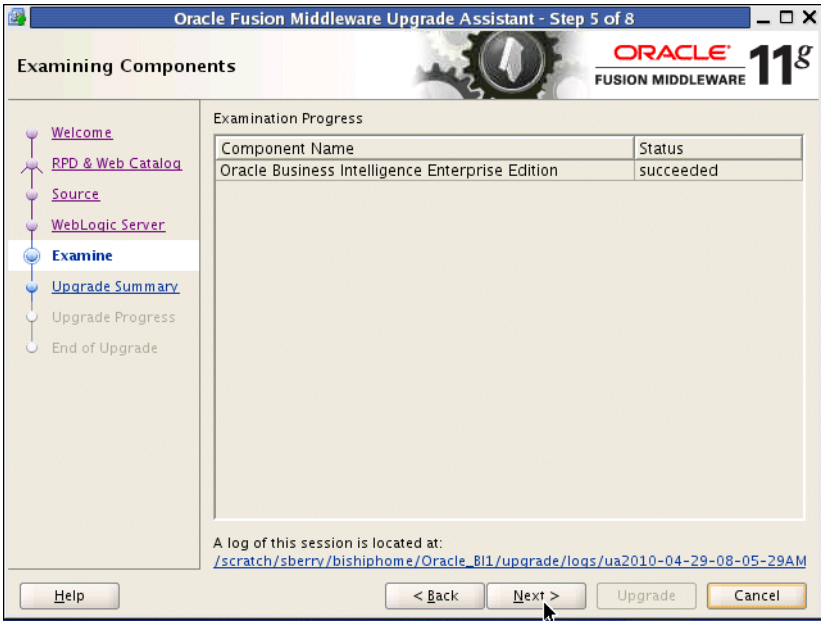
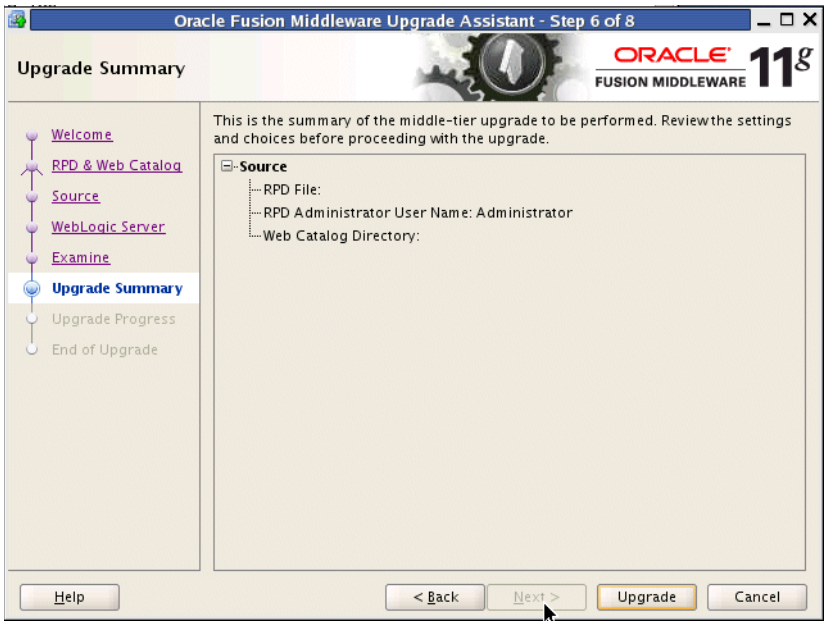
A.1.5 Examining Components



This graphic is a screen capture of the Examining Components scUpgrade Assistant Oracle Business Intelligence Enterprise Edition RPD and Web Catalog upgrade procedure.

****

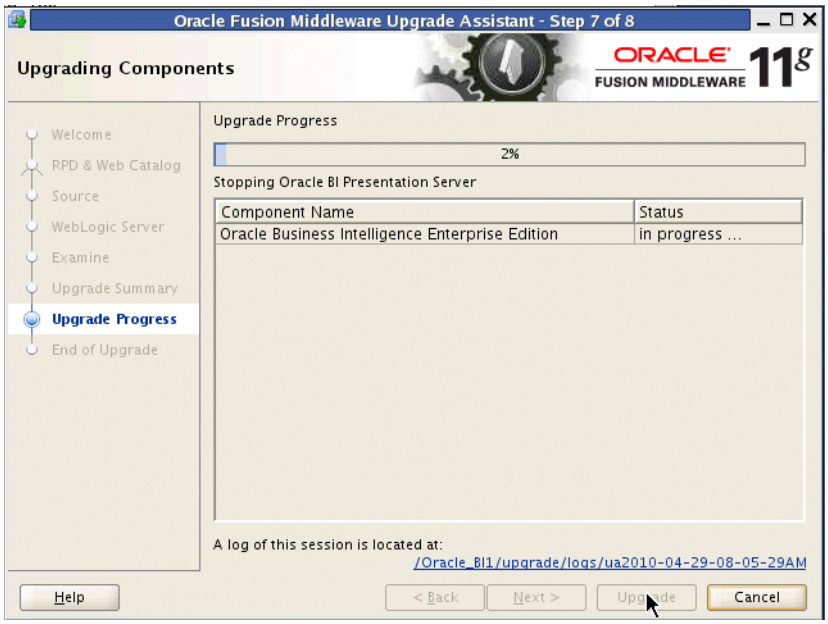
A.1.6 Upgrade Summary



This graphic is a screen capture of the Upgrade Summary screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition RPD and Web Catalog upgrade procedure.

****

A.1.7 Upgrading Components



This graphic is a screen capture of the Upgrading Components screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition RPD and Web Catalog upgrade procedure.

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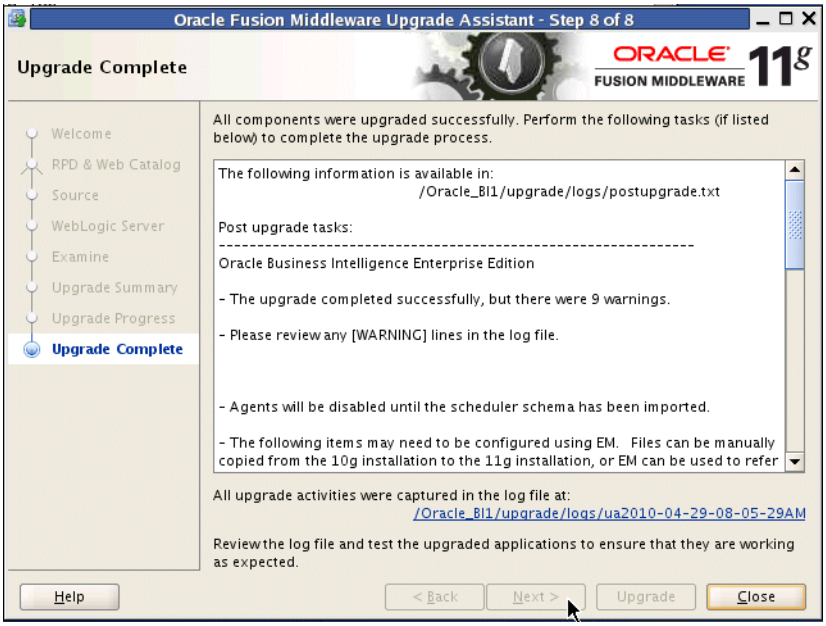
A.1.8 Upgrade Complete



This graphic is a screen capture of the Upgrade Complete screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition RPD and Web Catalog upgrade procedure.

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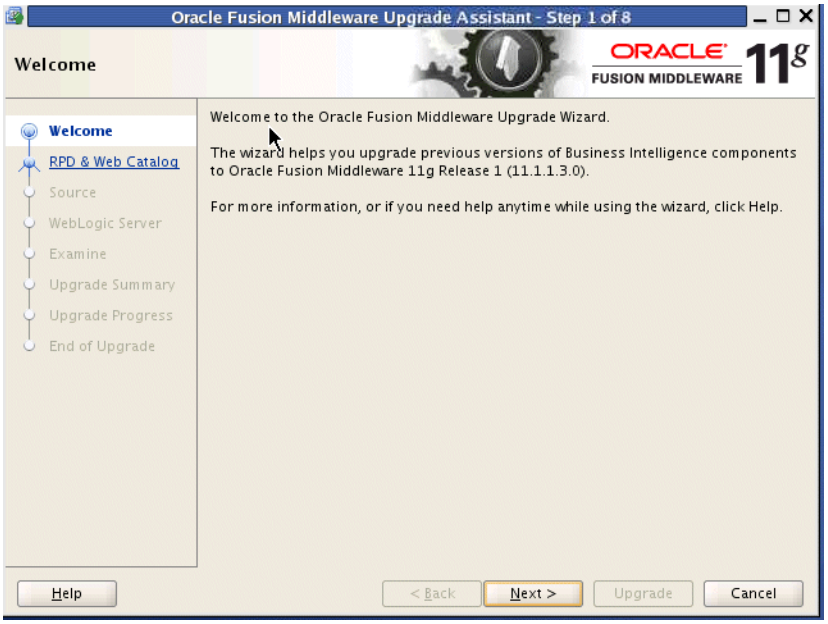
A.2 Upgrade Assistant Screens for Oracle BI EE Scheduler Schema Upgrade

This section shows the Upgrade Assistant screens for an Oracle BI EE Scheduler schema upgrade.

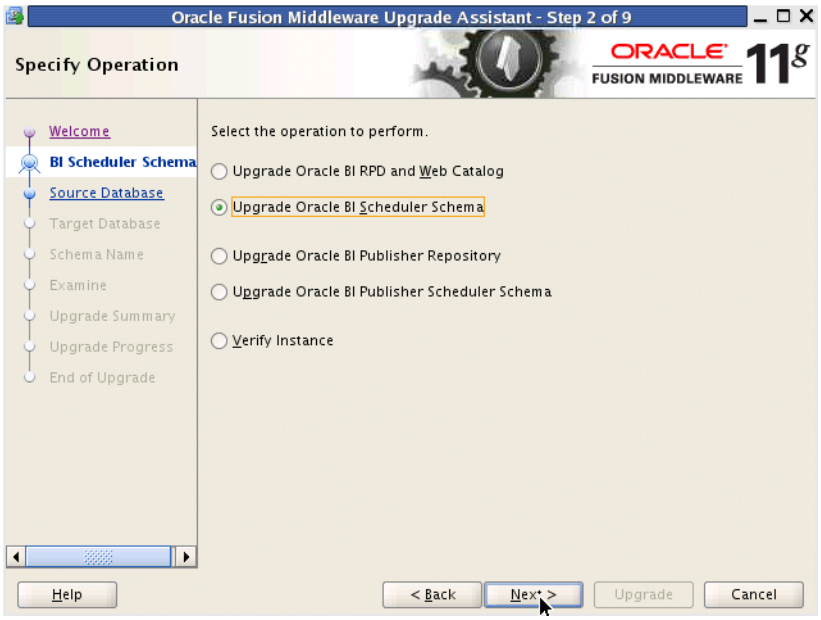
A.2.1 Welcome



This graphic is a screen capture of the Welcome screen. This screen introduces you to the Upgrade Assistant; it contains no input fields.

****

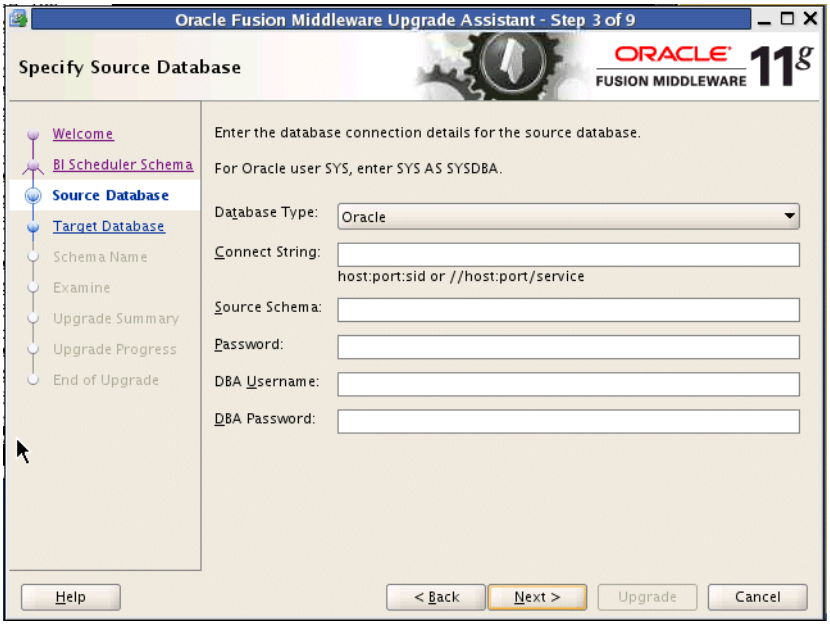
A.2.2 Specify Operation



This graphic is a screen capture of the Specify Operation screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition Scheduler Schema upgrade procedure.

****

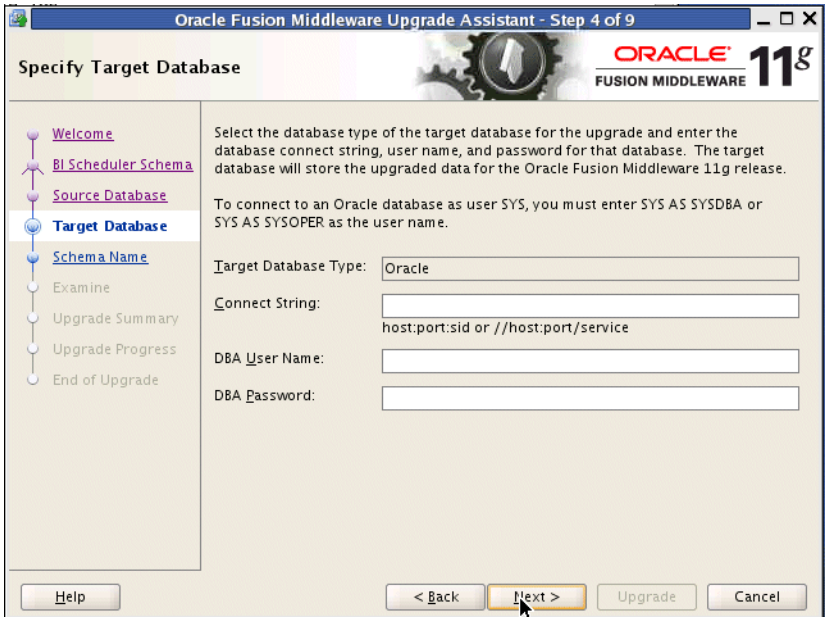
A.2.3 Specify Source Database



This graphic is a screen capture of the Specify Source Database screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition Scheduler Schema upgrade procedure.

****

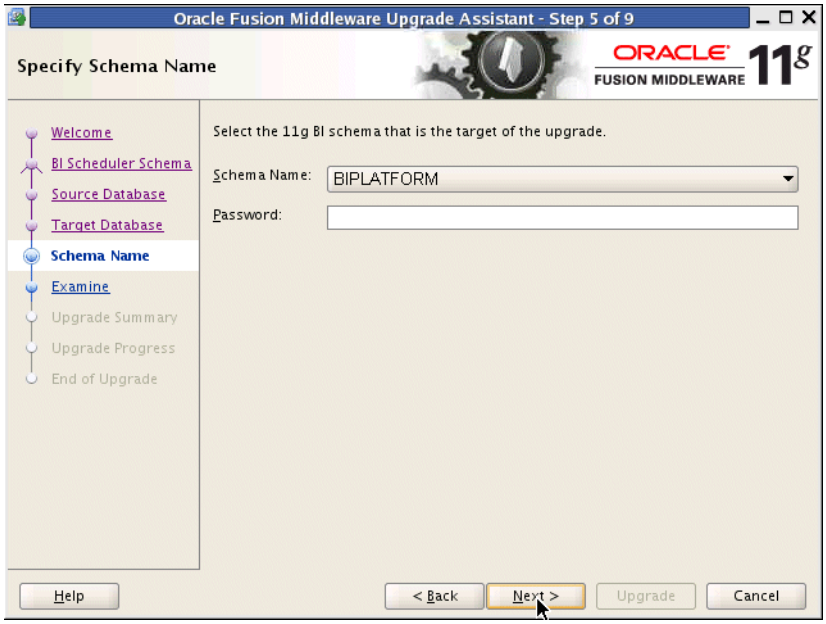
A.2.4 Specify Target Database



This graphic is a screen capture of the Specify Target Database screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition Scheduler Schema upgrade procedure.

****

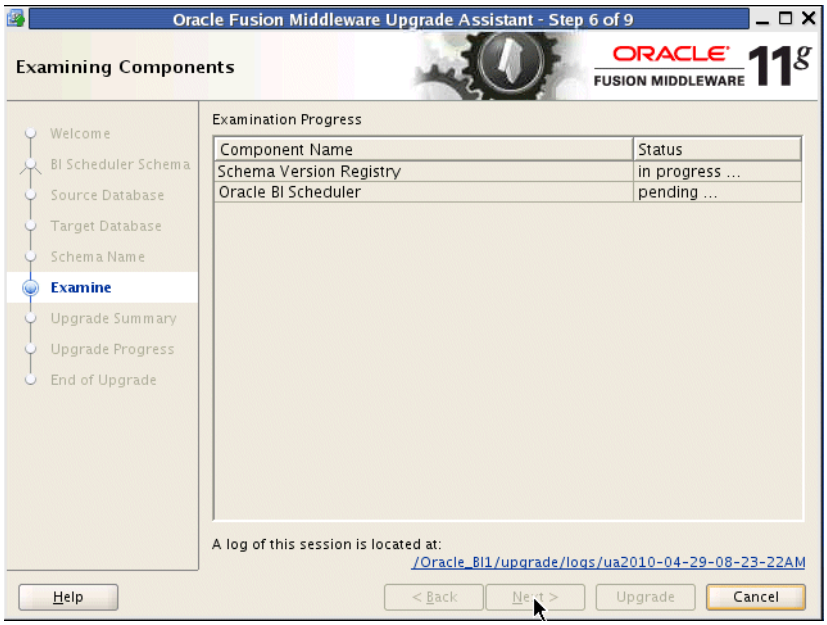
A.2.5 Specify Schema Name



This graphic is a screen capture of the Specify Schema Name screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition Scheduler Schema upgrade procedure.

****

A.2.6 Examining Components



This graphic is a screen capture of the Examining Components screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition Scheduler Schema upgrade procedure.

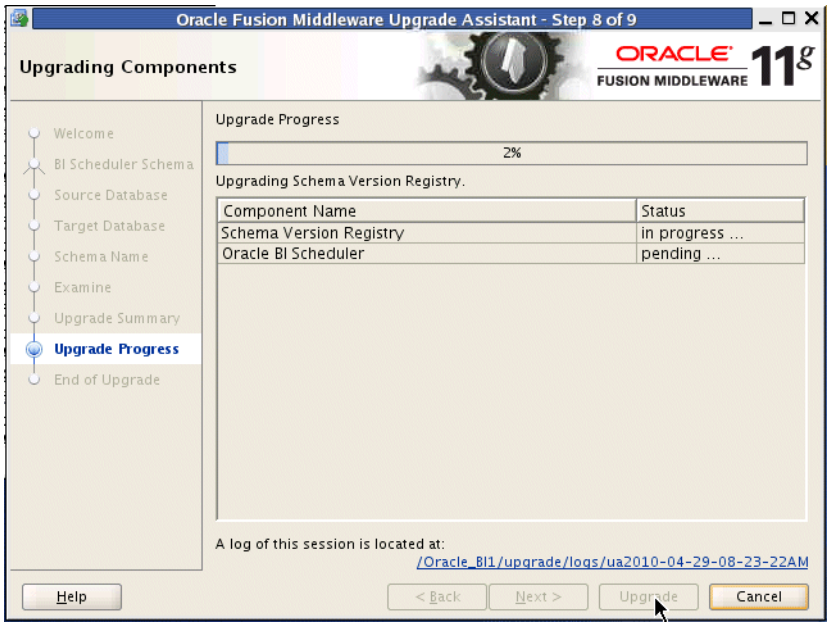
****

A.2.7 Upgrade Summary

This graphic is a screen capture of the Upgrade Summary screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition Scheduler Schema upgrade procedure.

****

A.2.8 Upgrading Components



This graphic is a screen capture of the Upgrading Components screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition Scheduler Schema upgrade procedure.

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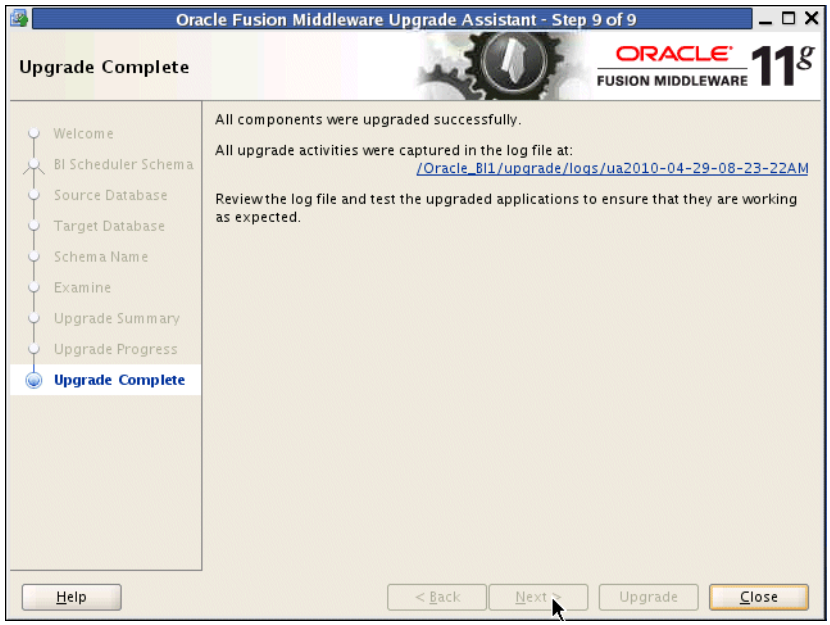
A.2.9 Upgrade Complete



This graphic is a screen capture of the Upgrade Complete screen of the Upgrade Assistant Oracle Business Intelligence Enterprise Edition Scheduler Schema upgrade procedure.

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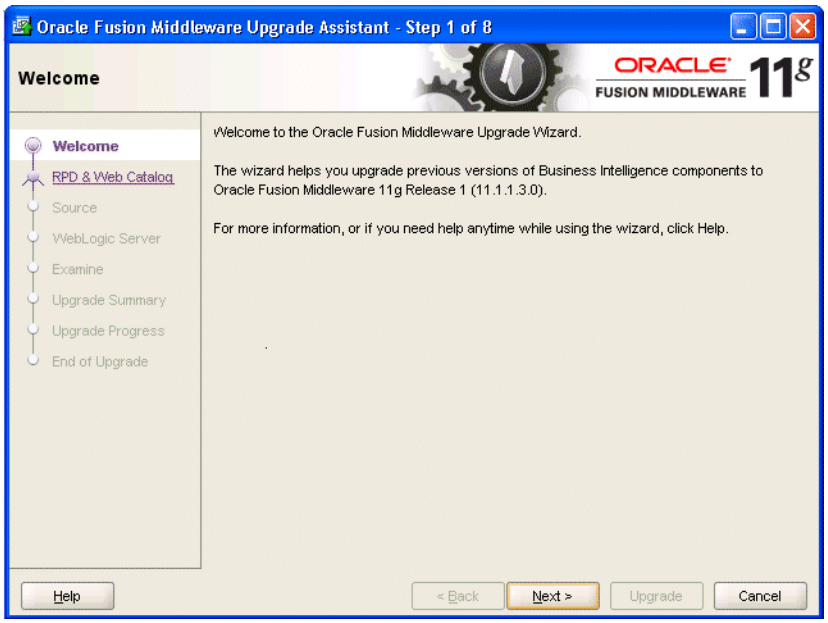
A.3 Upgrade Assistant Screens for an Oracle BI Publisher Repository Upgrade

This section shows the Upgrade Assistant screens for an Oracle BI Publisher Repository upgrade.

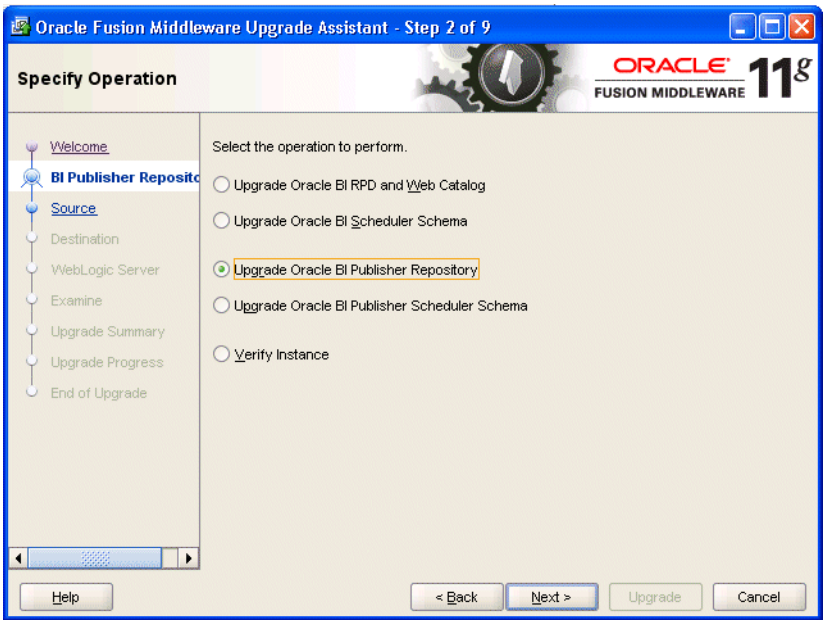
A.3.1 Welcome Screen



This graphic is a screen capture of the Oracle Fusion Middleware Upgrade Assistant Welcome screen. This screen introduces you to the Upgrade Assistant; it contains no input fields.

****

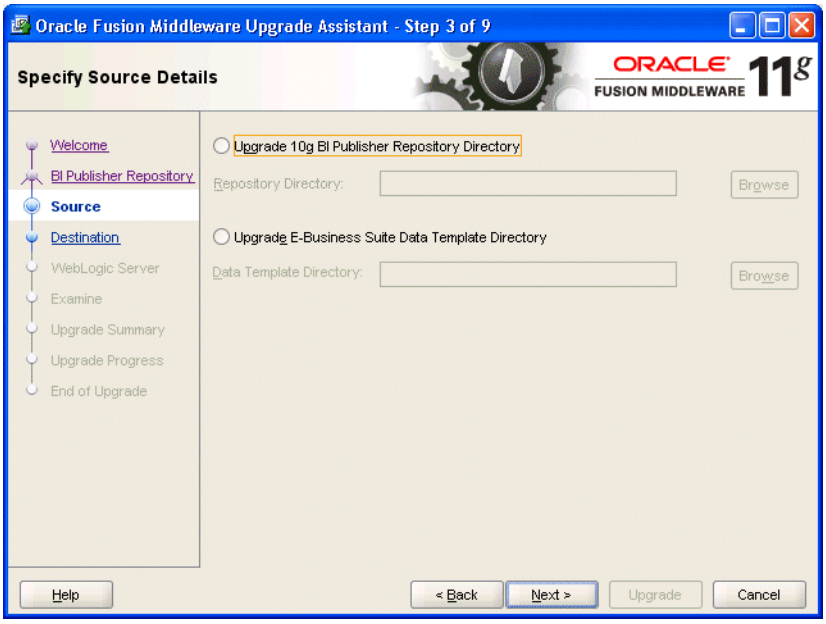
A.3.2 Specify Operation



This graphic is a screen capture of the Specify Operation screen of the Upgrade Assistant Oracle Business Intelligence Publisher Repository upgrade procedure.

****

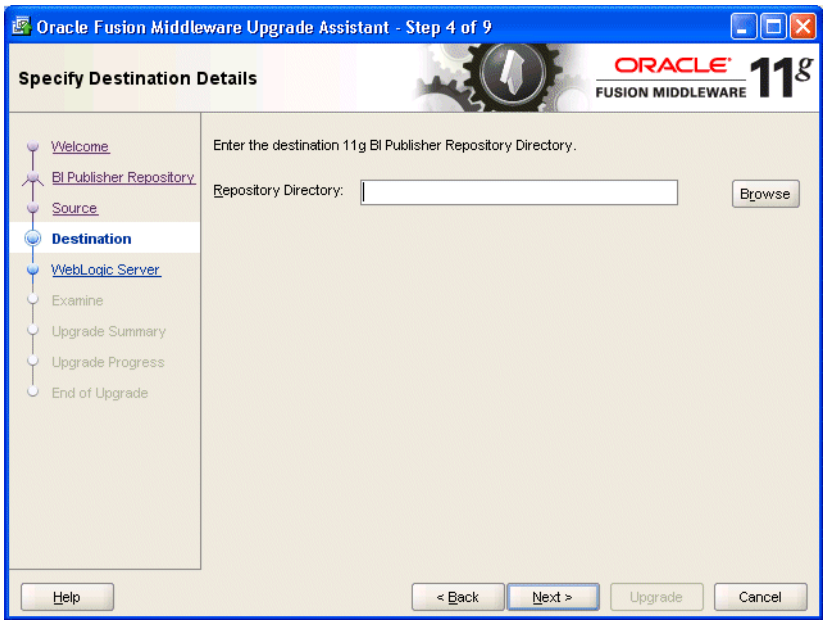
A.3.3 Specify Source Details



This graphic is a screen capture of the Specify Source Details screen of the Upgrade Assistant Oracle Business Intelligence Publisher Repository upgrade procedure.

****

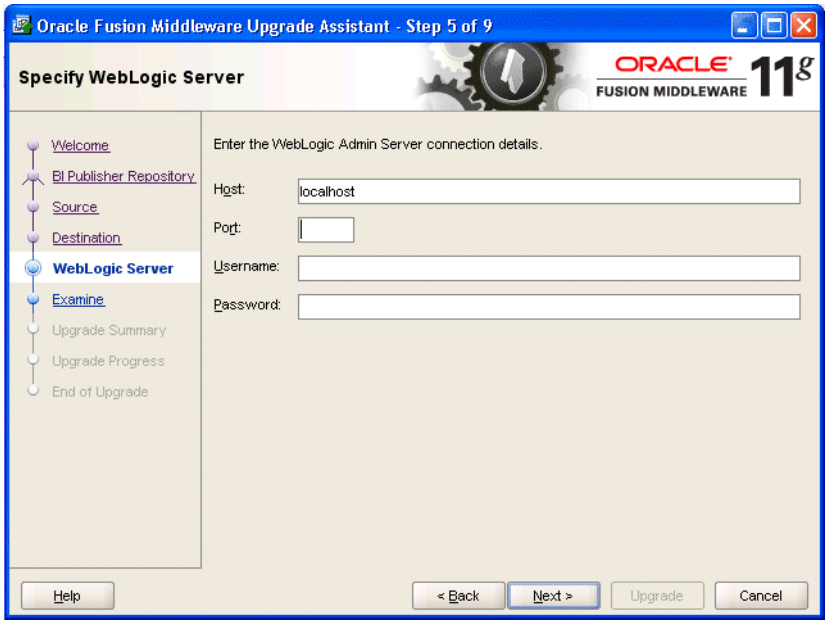
A.3.4 Specify Destination Details



This graphic is a screen capture of the Specify Destination Details screen of the Upgrade Assistant Oracle Business Intelligence Publisher Repository upgrade procedure.

****

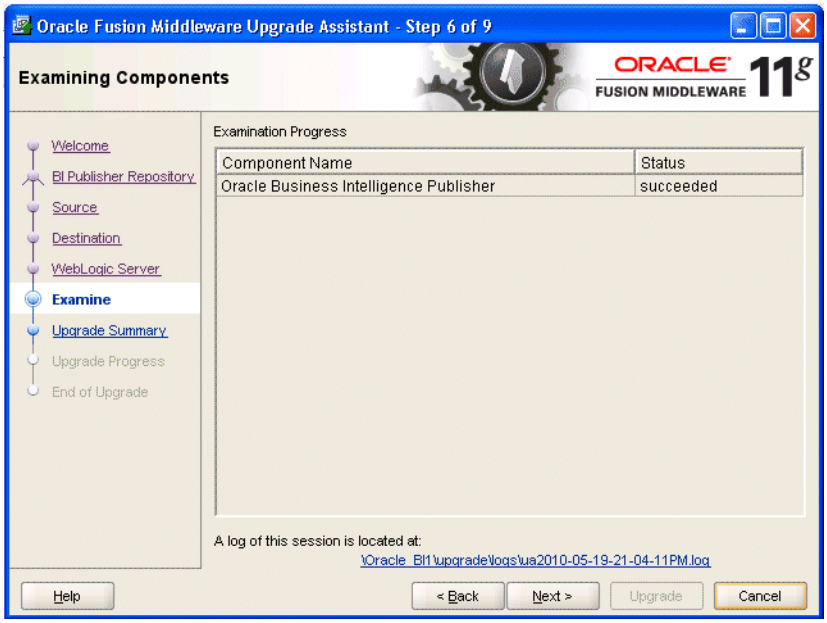
A.3.5 Specify WebLogic Server



This graphic is a screen capture of the Specify WebLogic Server screen of the Upgrade Assistant Oracle Business Intelligence Publisher Repository upgrade procedure.

****

A.3.6 Examining Components



This graphic is a screen capture of the Examining Components screen of the Upgrade Assistant Oracle Business Intelligence Publisher Repository upgrade procedure.

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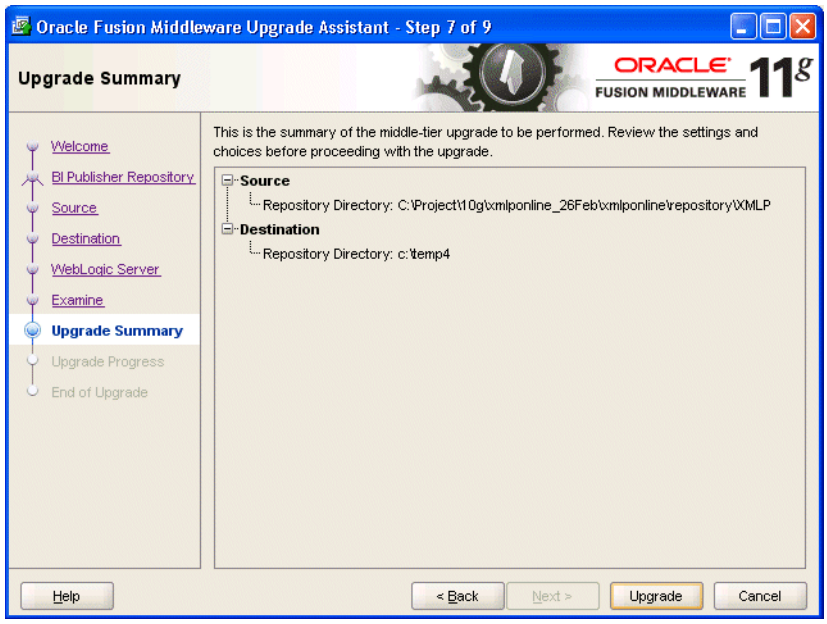
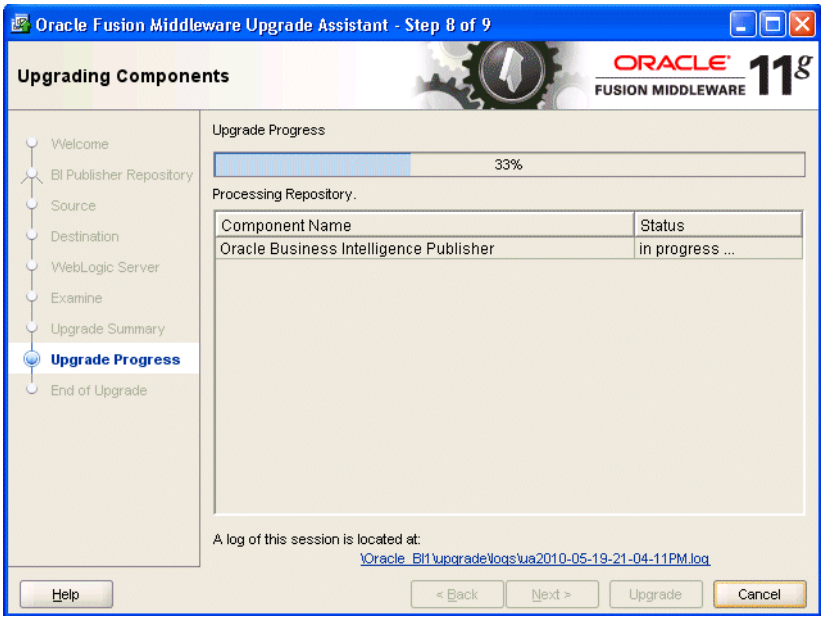
A.3.7 Upgrade Summary



This graphic is a screen capture of the Upgrade Summary screen of the Upgrade Assistant Oracle Business Intelligence Publisher Repository upgrade procedure.

****

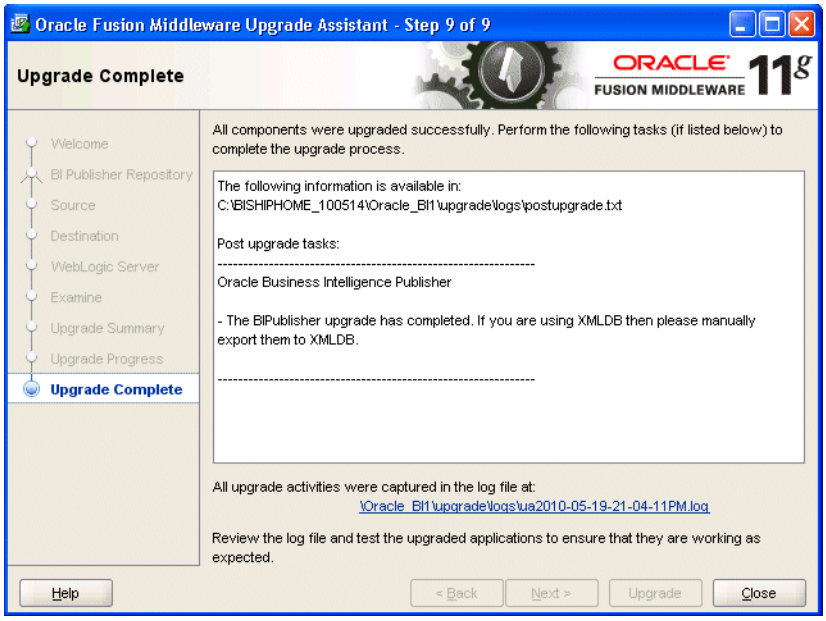
A.3.8 Upgrading Components



This graphic is a screen capture of the Upgrading Components screen of the Upgrade Assistant Oracle Business Intelligence Publisher Repository upgrade procedure.

****

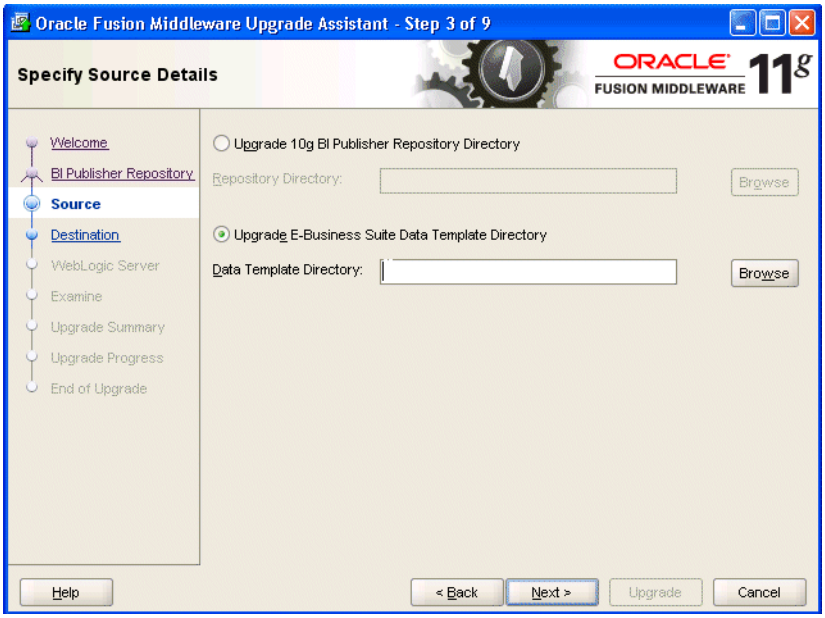
A.3.9 Upgrade Complete



This graphic is a screen capture of the Upgrade Complete screen of the Upgrade Assistant Oracle Business Intelligence Publisher Repository upgrade procedure.

****

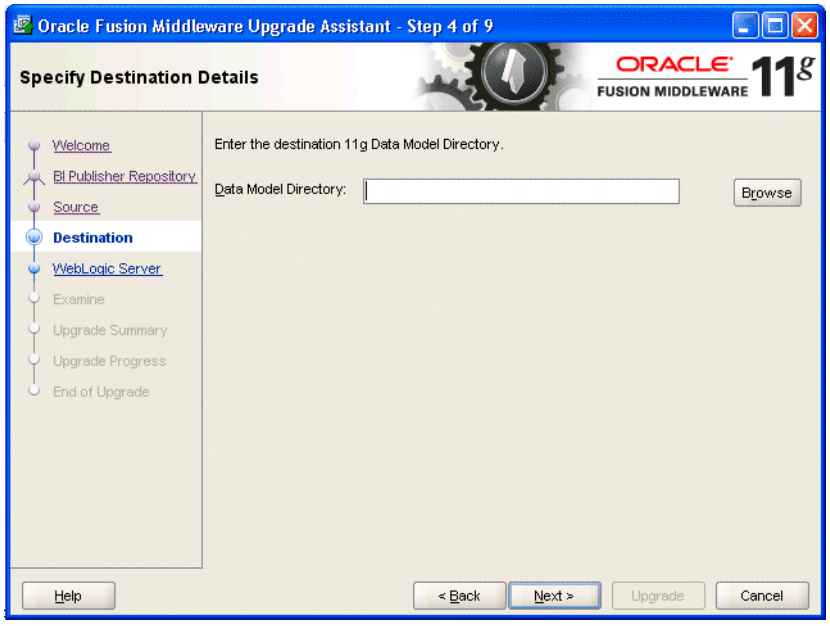
A.3.10 Specify Source Details



This graphic is a screen capture of the Specify Source Details screen of the Upgrade Assistant Oracle Business Intelligence Publisher Repository upgrade procedure.

****

A.3.11 Specify Destination Details



This graphic is a screen capture of the Specify Destination Details screen of the Upgrade Assistant Oracle Business Intelligence Publisher Repository upgrade procedure.

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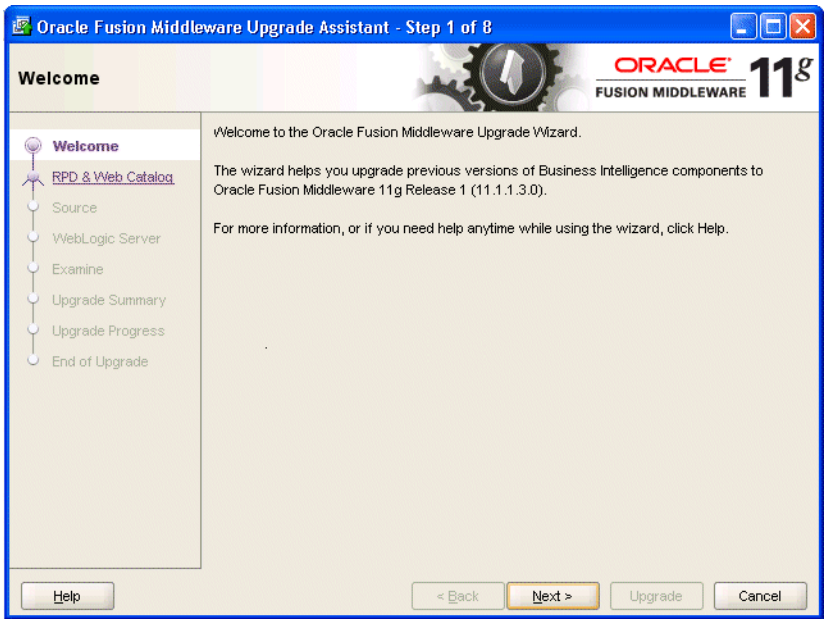
A.4 Upgrade Assistant Screens for Oracle BI Publisher Scheduler Schema Upgrade

This section shows the Upgrade Assistant screens for an Oracle BI Publisher Scheduler schema upgrade.

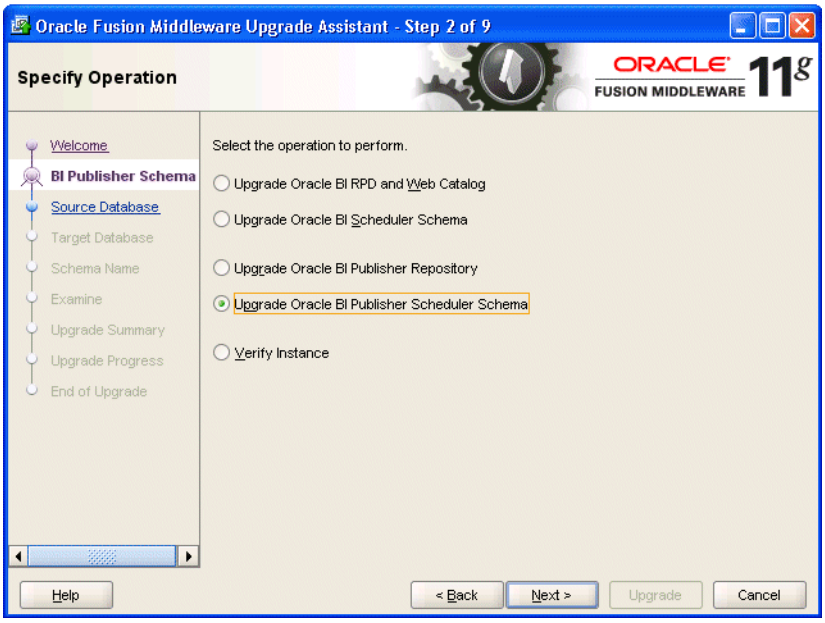
A.4.1 Welcome



This graphic is a screen capture of the Welcome screen. This screen introduces you to the Upgrade Assistant; it contains no input fields.

****

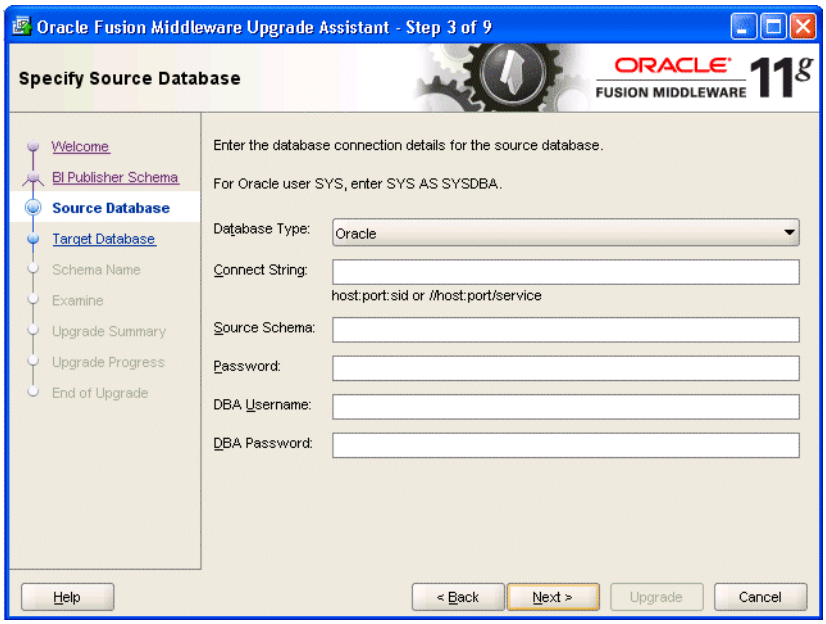
A.4.2 Specify Operation



This graphic is a screen capture of the Specify Operation screen of the Upgrade Assistant Oracle Business Intelligence Publisher Scheduler Schema upgrade procedure.

****

A.4.3 Specify Source Database



This graphic is a screen capture of the Specify Source Database screen of the Upgrade Assistant Oracle Business Intelligence Publisher Scheduler Schema upgrade procedure.

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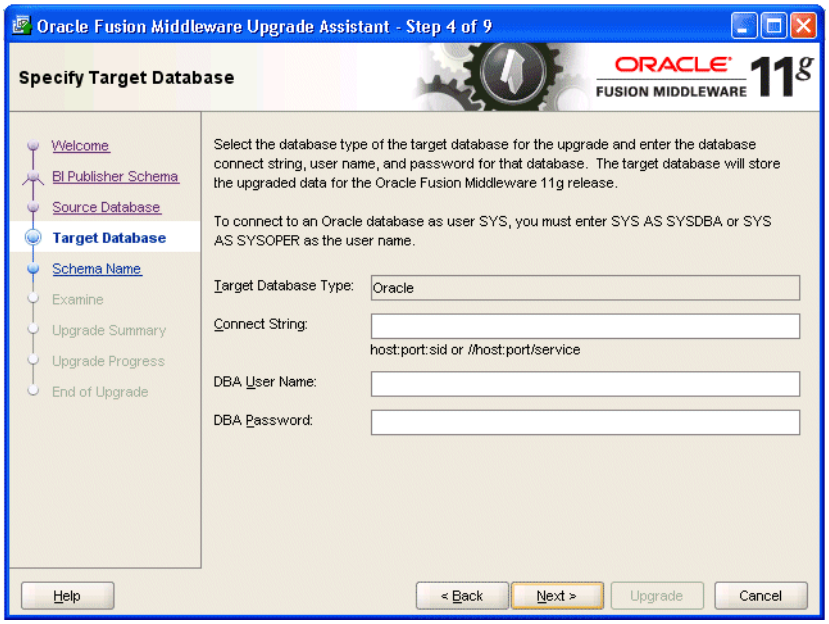
A.4.4 Specify Target Database



This graphic is a screen capture of the Specify Target Database screen of the Upgrade Assistant Oracle Business Intelligence Publisher Scheduler Schema upgrade procedure.

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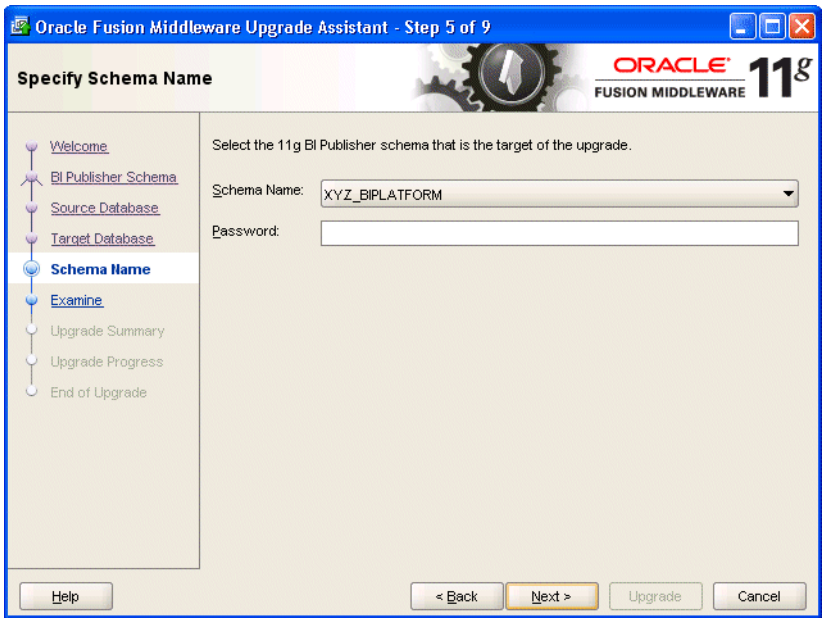
A.4.5 Specify Schema Name



This graphic is a screen capture of the Specify Schema Name screen of the Upgrade Assistant Oracle Business Intelligence Publisher Scheduler Schema upgrade procedure.

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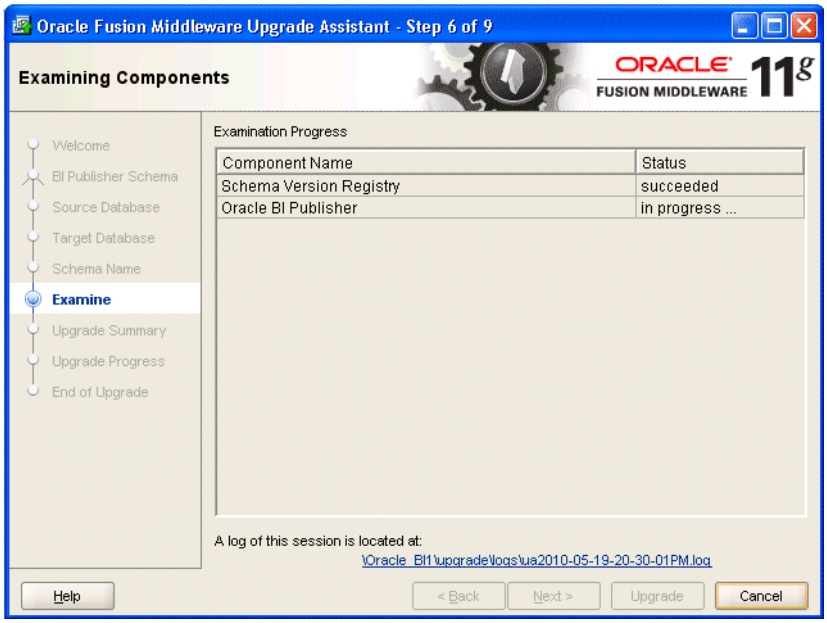
A.4.6 Examining Components



This graphic is a screen capture of the Examining Components screen of the Upgrade Assistant Oracle Business Intelligence Publisher Scheduler Schema upgrade procedure.

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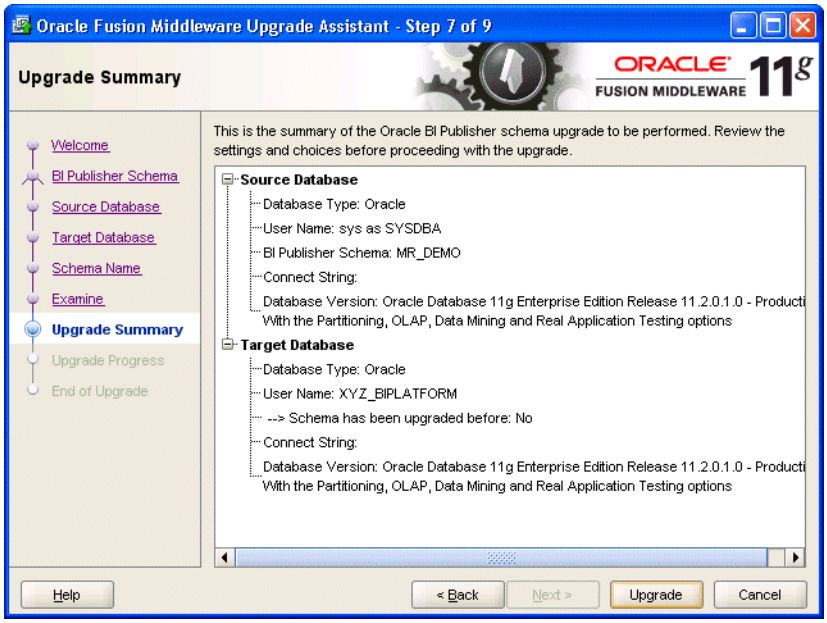
A.4.7 Upgrade Summary



This graphic is a screen capture of the Upgrade Summary screen of the Upgrade Assistant Oracle Business Intelligence Publisher Scheduler Schema upgrade procedure.

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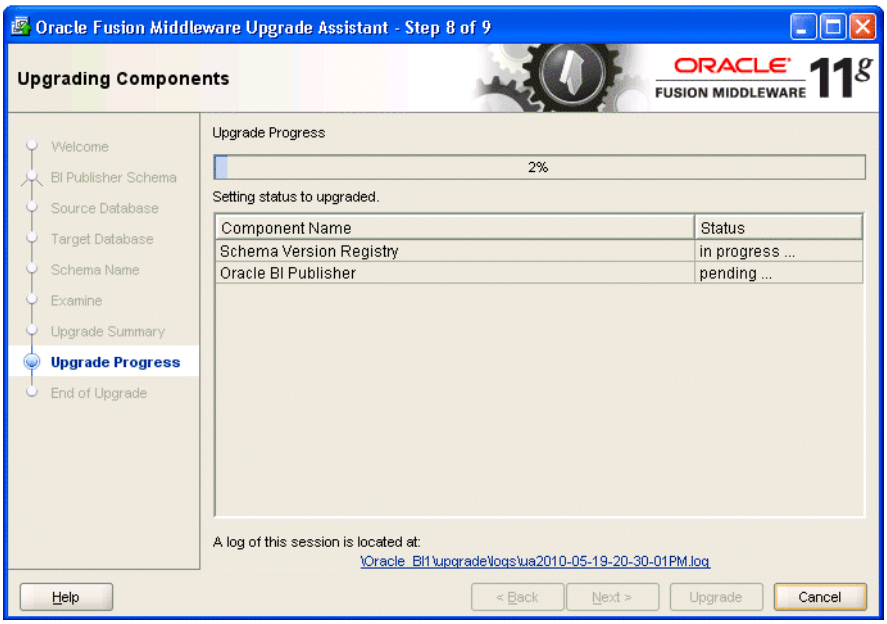
A.4.8 Upgrading Components



This graphic is a screen capture of the Upgrading Components screen of the Upgrade Assistant Oracle Business Intelligence Publisher Scheduler Schema upgrade procedure.

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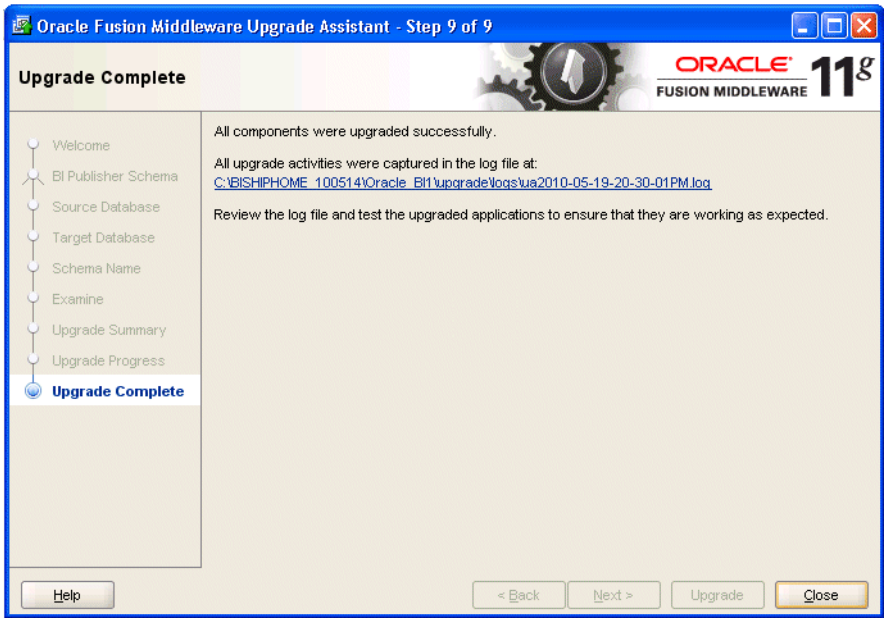
A.4.9 Upgrade Complete



This graphic is a screen capture of the Upgrade Complete screen of the Upgrade Assistant Oracle Business Intelligence Publisher Scheduler Schema upgrade procedure.

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B

Possible Changes in Oracle BI Enterprise Edition Appearance and Behavior After Upgrade

Table B–1 lists and describes possible changes with Oracle BI EE content after an upgrade from 10*g* to 11*g*. These changes result from enhancements, bug fixes and architectural changes in 11*g*.

Table B–1 Oracle BI content changes

Change	Description
Calculated Items added to all the views	Calculated items are generic in 11*g* and added to all views. In 10*g*, only Pivot Table View had calculated items. 10*g* reports which have pivot table view with a calculated item and any other views, after upgrade, the calculated item will be added to all the views.
Chart labels for Y-Axis cannot be rotated	You cannot rotate chart labels for Y-Axis other than 0-90 or -90. You cannot do 45 degree rotation.
Hidden columns used for labels do not appear	Hidden columns used for labels in 10*g* are not shown in 11*g*. If you have a column used as the label for a chart, but the column is hidden from the chart, in 11*g*, the labels do not appear.
Column sort is discarded	If there are two columns with a sort by the first column and then sorted by the second column, and you choose to exclude the first column in the view, in 10*g*, the first sort is still respected. In 11*g*, the first sort is discarded and the data is sorted only by the secondary column included in the view.
Line charts are stacked	Some line charts, which were not stacked in 10*g*, are stacked in 11*g*.
Aggregate Rule may need to be changed after upgrade	In 10*g*, in some cases when the column formula has `rcount`, the default formula is `max`. However, in 11*g*, max is not the default. As a result, you must change the Agg Rule in the formula after upgrade.
Charts may have missing labels	Because of DVT restrictions, some charts may have missing labels.
Ranges may need to be modified after upgrade	In 11*g*, gauge chart ranges are continuous. As a result, you can only specify the thresholds and the ranges which are calculated based on the continuous ranges. If the input thresholds result in an irregular gauge range, the chart is not rendered, and an error message appears. You must modify the ranges after upgrading.

Table B–1 (Cont.) Oracle BI content changes

Change	Description
Integer data types now double data types	Override the default data format for columns that were integer data types in 10*g*, and are now double data types in 11*g*. Without this workaround, the data for this column will display as a decimal number with two digits to the right of the decimal point.
Sort order may be different	Some 11*g* reports may have a different sort order than those same reports in 10*g*. For example, the default sorting for pivot charts in 11*g* is from left to right. In 10*g*, pivot tables had no default sort.
Axis label ranges changed	The ranges for the axis labels in charts has changed from 10*g* to 11*g*.
Default pivot chart rows have changed	In 11*g*, pivot charts have a default of twenty five display rows. To resolve this issue, you can change the setting in the `instanceconfig.xml` file to increase the default number of rows displayed.
Hidden but included date does not appear	In 10*g*, if a column was hidden but included in a pivot table, the data appears in the table. In 11*g*, if the column is hidden at the criteria level, then the data does not appear.
Navigations in charts have changed	11*g* chart navigations have changed. If you had navigations on the axis labels or legends in 10*g*, they are now moved to the criteria level and are therefore not available.
Possible duplicate navigations	In 11*g*, action links are generic and upgraded to criteria action links for measures. As a result, there may be duplicate navigations. This may also result in a scenario where a view is pointing to a non-existent report, resulting in a "Path Not Found" error. For example: If you have a report with two hidden charts and each has an action link on it. Upon upgrade, all chart action links will be upgraded to criteria action links for measures - this will result in additional action links in other views. In this case the action links in the original chart are pointing to non-existent reports. The workaround for this error is to clean all hanging action links manually.
Report_count does not support distinct keyword	In 11*g*, Report_count does not support distinct keywords. Therefore, answers must use count (distinct) instead of countdistinct. This affects the data when you choose to use a TopN or BottomN in the filter for a measure.
Report-based Aggregate	When you choose report aggregate in 10*g*, you received an aggregate and not a report-based aggregate. In 11*g* you receive a report -based aggregate.
Negative pie chart values no longer rendered	In 10*g*, pie charts rendered the absolute values, including negative values. In 11*g*, DVT ignores negative values.
Table enhancement	In 10*g* when you drill-down into a table, the corresponding chart is displayed, and the original table is not displayed in the chart. But in 11*g* when you drill down into a table, the corresponding chart and the original table are displayed.
Data formatting may change in 11*g*	11*g* data formatting in some of the reports may be different than the data formatting in 10*g*. For example, if you had two decimals in 10*g*, you may not have those two decimals in 11*g*.
Additional Criteria columns added	After upgrade, additional criteria columns may appear. You might see a column repeating multiple times.

Table B–1 (Cont.) Oracle BI content changes

Change	Description
No Results message displayed	In 10*g*, if there is a column selector and the first column in the column selector does not return any results, the column selector view appears, allowing you to select other columns. In 11*g*, a `No Results` message appears and you are unable to see the other columns.
Font weight and alignment issues	In 11*g*, there are changes in font weight and alignment resulting from changes in default style sheets and skins.
Gray cell borders not kept	In 11*g*, there is a change of borders from bottom/right to top/left for hierarchical columns. You can resolve this issue manually using report definitions.
Conditional Format enhancement	In 11*g*, Conditional formatting is enhanced to respect all defined conditions.
Rendering a link may add extra filter	In 11*g*, extra filters may appear while rendering a link. When you navigate to another report, all the values are passed to the target report if the column of the value is repeated. However, only the values at the left of the clicked column are passed in 10*g*.
Pie chart has legend with a mini pie chart	When you choose to use a chart in a legend that reduces the size of the chart to be too small, 10*g* does not show the entire chart. However, 11*g*'s DVT charting engine renders a chart even in the smallest space.
Data different in bar graph-services dashboard	For 11*g*, the data format has been enhanced to show the differences between double and integer data types. You can resolve this issue manually by overriding the default data format for columns that were integer data types in 10*g* and now double data types in 11*g*.
Return data from certain column may be different	In some situations, the return data type of certain columns in the current release can be different from previous releases of Oracle Business Intelligence. In the previous release, some data sources, such as SQL Server and IBM DB2, returned an integer for division formulas such as AVG, while other data sources returned a double. Now, the results of all division formulas are promoted to a double type regardless of the data source, for consistency and for a more correct and precise value. This difference may impact report results because some reports from previous releases might not be formatted properly for decimal points. If this occurs, override the default data format for columns that were integer data types in the previous release, but that are now double data types. If you do not perform this step, the data for affected columns displays as a decimal number with two digits to the right of the decimal point.
Right side scale may be missing from a chart	In 11*g*, the new charting engine maps the Y2 axis in a line bar graph to a line. Therefore, even though axes are not synced, the Y2 axis cannot be shown because there is no data for a line.
Data may be different upon drill-down	In 10*g*, only the drilled value is passed on drill-down. However, the entire row value is passed in 11*g*. Therefore, this may act as a filter/prompt for the target report resulting in a different value.

Table B–1 (Cont.) Oracle BI content changes

Change	Description

Graphing engine is not responding	In 11*g*, the default value of the chart data that is sent by the JavaHost to the BI Presentation Server is 4 MB. If you have a chart with a large size, you may get Graphing engine is not responding message. The workaround is to increase the chart data size in instanceconfig.xml file. Below is the tag for chart data size (size is increased to 6 MB in the below example):
	`<Views>`
	`<Charts>`
	`<JavaHostReadLimitInKB>6144</JavaHostReadLimitInKB>`
	`</Charts>`
	`</Views>`

Row(s) may be missing in a Pivot Table	In 10*g*, the row(s) without any measure data are displayed. In 11*g*, these blank rows are suppressed. As a result, you may see missing row(s).
Attribute column in measure section may be repeated in a pivot table	In 10*g*, if you have an attribute column at the row edge and also in the measure section, it will be displayed blank. In 11*g*, this will show the exact value of the attribute and therefore you may see repeated values.
Additional pop-up menu for a report	This is a UI enhancement in 11*g* to support multiple links for navigation. You can turn this off in the Interaction tab if you have single link.

Integer division returns integer in 11*g*	Integer division that returned double point data in 10*g* is returning an integer in 11*g*.
	To get integer division to return a double point results:
	Cast the numerator to a double point data type before the division. For example:
	`"int x" / "int y" = "int z"`
	`Cast( "int x" as float) / "int y" = "float z"`
	`Cast( "int x" as double) / "int y" = "double z"`
	If this is different behavior than you saw in the last release, it is because a known issue caused integer division to incorrectly produce a double point result when certain physical data sources where used.

Multiple pie charts in 11*g* for single pie chart in 10*g*	Oracle BIEE 10*g* does not support multiple pie charts, however, 11*g* supports pie charts for all columns. This enhancement may result in multiple pie charts after upgrade.
Drill-down on a chart may show different results	In 11*g*, the chart action links only go to the measures not to the dimensions. This may cause different result on chart drill-down.
Some measures rendered as lines are now bars	In 10*g*, randomly some measures are picked to be rendered as lines instead of bars. In 11*g*, the plotting of the measures will depend upon the graph definition in the report and will be respected. If the measures are defined to appear as bars they now appear as bars.
Missing unknown column in a chart	10*g* adds an unknown column to a chart whenever the chart definition was not completed by the columns currently in the layout. This is fixed in 11*g* so you may see a missing column in the chart.

Table B–1 (Cont.) Oracle BI content changes

Change	Description

Oracle BI Server returns all month and day names as three lettered abbreviations.	Oracle BI Server return all month and day names as three lettered abbreviations. To use full names, modify the `NQSConfig.ini` file to `YES` for the following values.
	`USE_LONG_MONTH_NAMES = NO;`
	`USE_LONG_DAY_NAMES = NO`
	
	After this change, any report using a CASE statement with month names or week names, should match the statements to be either long name or short name according to the setting in the `NQSConfig.ini` file.

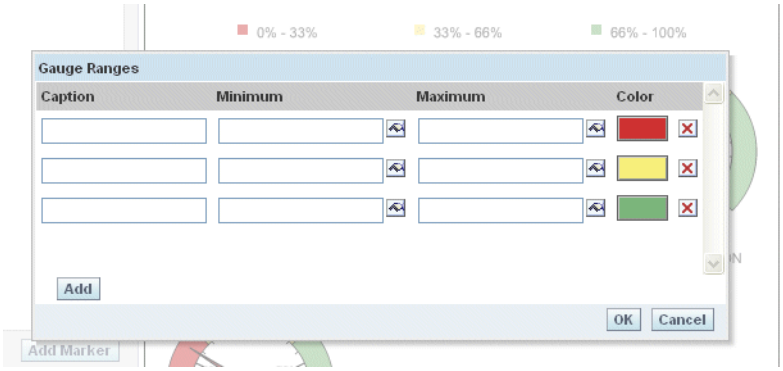
Possible data difference with time-series data	In 11*g*, time-series functions, such as ToDate and Ago do not automatically add hidden key columns to the request as in 10*g*. This may cause possible data differences in 11*g*.
Different axis value in 11*g*	In some cases in 10*g*, the chart view ignores the data format specified in the criteria. This issue has been addressed in 11*g*, which may cause difference in data and axis value.
Wrong formatting while using reserved keywords	In 11*g*, reserved keywords, for example, CASE, WHEN, SELECT, PERCENT, must be double quoted. Otherwise, this may result in incorrect formatting.
Missing view in 11*g*	In 11*g*, query are not run if there are no data views in the report. 10*g* would run the query and show a no results view if there were no results. This may cause a missing view in 11*g*.
Change in Gauge chart behavior in 11*g*	In 11*g*, for a gauge, the ranges must be continuous (for example, range1: 1-200, range2: 200-400, and range3: 400-500). In previous releases, ranges that were not continuous were allowed (for example, range1: 0-200, range2: 400-500, and range3: 200-400). See the Upgrade Behavior for Gauge Chart for details.
Possible mismatch between Legend and Chart in 11*g*	When a stacked bar graph is upgraded from 10*g* to 11*g*, the order/position of the series may get changed. However, the Legend view is upgraded without any change. This may cause a mismatch between the legend displayed in the legend view and the color appearing in the chart. To resolve this, either change the color in the chart or update the legend to match the color in the chart.

Upgrade Behavior for Gauge Chart

In Oracle Business Intelligence 11*g*, the ranges for Gauge are continuous. From the Gauge Ranges dialog box you can specify only the thresholds from which the ranges are calculated. If the input thresholds result in an irregular gauge range, the chart is not rendered and an error message appears.

In Oracle Business Intelligence 10*g*, you input the minimum and maximum value for a range from the UI, from which the chart is rendered.

Figure B–1 Gauge Ranges Thresholds



This graphic shows a a dialog box where you enter gauge range thresholds for charts.

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Oracle Business Intelligence 11*g* is based on Thresholds. During upgrade, the Low/Minimum values specified for the Range are considered.

The following scenarios illustrate the rendering of upgraded Gauge charts:

1. If the Ranges are not specified in an ascending order, but are otherwise continuous, (they are not overlapped or nested).

   In Oracle BI 10*g*:

Table B–2 Gauge Chart Ranges Not Specified in an Ascending Order 10g

Range1	Minimum = 0	Maximum = 200 (red)
Range2	Minimum = 400	Maximum = 500 (green)
Range3	Minimum = 200	Maximum = 400 (yellow)

   The Upgraded 11*g* charts:

Table B–3 Gauge Chart Ranges Not Specified in an Ascending Order 11g

Range1	Minimum = 0	Maximum = 200 (red)
Range2	Minimum = 200	Maximum = 400 (yellow)
Range3	Minimum = 400	Maximum = 500 (green)

   Ranges are ordered based on their Minimum values, as long as they are logical and correct.

   The upgraded 11*g* chart rendered is identical to the 10*g* chart.

2. If Minimum or Maximum value is not specified for a range, the chart is populated in accordance with the 10*g* chart in the following manner. If the final ranges obtained are continuous and valid, the Gauge is rendered for the upgraded chart.

   a. If the Minimum value is missing for the first range specified, the Minimum scale limit is picked up.

Table B–4 Gauge Chart Ranges with Minimum or Maximum Values Not Specified

Range1	Minimum = ? (0) (This value is picked up for the missing value)	Maximum = 200 (red)
Range2	Minimum = 200	Maximum = 400 (yellow)

b. If the minimum value is missing for the other ranges (not in first range), the Maximum value specified for the preceding range is picked up.

Table B–5 Gauge Chart Ranges with Minimum Value Missing

Range1	Minimum = 0	Maximum = 200 (red)
Range2	Minimum = ? (200) (This value is picked up for the missing value)	Maximum = 400 (yellow)

c. If the Maximum value is missing for the Last range specified, the Range extent of the preceding range + Minimum value specified is picked up.

Table B–6 Gauge Chart Ranges with Maximum Value Missing

Range1	Minimum = 0	Maximum = 200
Range2	Minimum = 200	Maximum = 500
Range3	Minimum = 500	Maximum = ? ((500-200) + 500 = 800)

d. If the Maximum value is missing for other ranges (not in the last range), the minimum value specified for the following range is picked up.

Table B–7 Gauge Chart Ranges with Maximum Value Missing

Range1	Minimum = 0	Maximum = 200
Range2	Minimum = 200	Maximum = 600
Range3	Minimum= 600	Maximum = 700

3. If the Ranges are disjointed:

Table B–8 Gauge Chart Ranges Disjointed

Range1	Minimum = 0	Maximum = 100 (red)
Range2	Minimum = 200	Maximum = 300 (yellow)
Range3	Minimum= 400	Maximum = 500 (green)

The upgrade chart is rendered considering the Minimum/Low values specified.

For the upgraded chart, the range is:

Table B–9 Gauge Chart Ranges Disjointed 11g

Range1	Minimum = 0	Maximum = 200 (red)
Range2	Minimum = 200	Maximum = 400 (yellow)
Range3	Minimum = 400	Maximum = 500 (green)

4. If the Ranges specified overlap:

Table B–10 Gauge Chart Ranges Specified Overlap

Range1	Minimum = 0	Maximum = 200
Range2	Minimum = 100	Maximum = 500

The upgraded range may or may not be identical to the 10*g* gauge.

5. If the ranges specified are nested

Table B–11 Gauge Chart Ranges Nested

Range1	Minimum = 0	Maximum = 500
Range2	Minimum = 100	Maximum = 200

The upgraded range may or may not be identical to the 10*g* gauge.

6. If the minimum value specified is higher than the Maximum value the upgraded gauge may or may not be identical to the 10*g* gauge.

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