

## **Oracle® Cloud**

Administering Your Deployment for Oracle Transactional Business  
Intelligence Enterprise

11g Release 10

**E54436-04**

December 2015

Provides initial security setup tasks for Implementors and  
administration tasks for Administrators.

Oracle Cloud Administering Your Deployment for Oracle Transactional Business Intelligence Enterprise, 11g Release 10

E54436-04

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# Preface

This guide contains information about ordering and setting up security for Oracle Transactional Business Intelligence Enterprise.

## Topics:

- [Audience](#)
- [Conventions](#)
- [Related Resources](#)

## Audience

This guide is aimed at administrators and implementors.

## Conventions

These conventions are used in this document.

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

## Related Resources

These related Oracle resources provide more information.

- [Oracle Cloud Known Issues for Oracle Transactional Business Intelligence Enterprise](#)
- [Oracle Cloud Implementing Your Deployment for Oracle Transactional Business Intelligence Enterprise](#)



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# Ordering, Activating, and Setting Up Security

You purchase an Oracle Transactional Business Intelligence Enterprise (OTBI Enterprise) service by contacting an Oracle sales representative. When you purchase OTBI Enterprise, you specify the name and details of the person who will be the account activator. The account activator then assigns an account administrator during activation.

## Topics:

- [Ordering and Activating OTBI Enterprise](#)
- [Setting Up Security in OTBI Enterprise](#)
- [Provisioning a User for Oracle Business Intelligence Cloud Connector Access](#)
- [About Administration Tools](#)

## Ordering and Activating OTBI Enterprise

Order and activate OTBI Enterprise.

1. Place an order for OTBI Enterprise with your Oracle sales representative.

Once you are set up with an account, you can complete your order by logging in to My Account.

- a. In the Place OTBI Enterprise Paid Order dialog, select your Account Name and Data Region.

- b. Select **Add Activator** and enter an Activator Email address.

This user is the default administrator for the service, responsible for initial creation of users and roles.

- c. Select plans for the OTBI Enterprise service and the included Storage service.

2. Click **Place Order**.

An activation email with the subject, "Welcome to Oracle Cloud: Complete your paid order" is sent to the email address that you specified as an activator.

3. When you receive the activation email, click **Complete My Order**.

The Assign Service Details page of Oracle Cloud My Account Order Activation is displayed in your browser, where you assign service details, create an identity domain, and verify associations between OTBI Enterprise and Oracle Storage Cloud Service.

4. Under **Account**, select the language and time zone.
5. Under **Account Administrator**, provide the user name and first and last name of the user that you wish to designate as an administrator for the Cloud account.  

The user name is specified as an email address for the user.
6. Under **Identity Domain**, select one of the following options, depending on whether you want to create a new identity domain or use an existing Fusion identity domain for single sign-on.
  - a. To use an existing identity domain, for example an Oracle Fusion identity domain, select the identity domain. The Administrator information is automatically populated with the Fusion identity store administrator's details. For single sign-on to work for a specific Fusion user, the user has to have a corresponding user in the Oracle Public Cloud Shared Identity Management with the same email as the Fusion username and with appropriate roles.
  - b. To create a new identity domain, select **Create New Identity Domain** from the Name drop-down menu, then enter a name for the identity domain. Provide the email, user name, and first and last name of the identity domain administrator you want to designate.
7. Under **Oracle Transactional Business Intelligence Enterprise Cloud Service**, enter an email, user name, and first and last name for the service administrator.  

This administrator is assigned the predefined Identity Domain Administrator role necessary to manage the Oracle Public Cloud Shared Identity Management, and is responsible for setting up and assigning Enterprise Roles required by OTBI Enterprise. For more information, see [About Required Enterprise Roles](#).
8. Provide details of the service administrator for the Oracle Storage Cloud Service.
9. Click **Next**.
10. On the **Service Associations** page, verify that the association between your OTBI Enterprise and the required Oracle Storage Cloud Service has been established.
11. Click **Next**.
12. On the **Activate Services** page, verify the details that you have specified for the services, then click **Activate**.
13. On the **Review Summary** page, verify that both services are activated, then click **Close**.  

Once the order is activated, the test environments are provisioned in the Oracle Cloud. This process takes approximately 4.5 hours, after which the designated administrators for the Cloud services receive emails with the subject, "Welcome to Oracle Cloud. Your services are ready." This email includes links and a user name and temporary password for logging in to My Services and the OTBI Enterprise service.
14. Under the **OTBI Enterprise** section, click the Service URL to launch the service.
15. On the Oracle Cloud login page, enter the User Name, Password, and Identity Domain as listed in the Welcome email and click **Sign In**.
16. In the **Identity Self Service** page, reset your temporary password.



- a. Enter your temporary password as the Old Password.
- b. Enter and retype your New Password.
- c. Register three challenge questions for your account using the Question and Answer drop-down menus.
- d. Click **Submit**.

You are logged in to the OTBI Enterprise service.

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**Note:** Until a user has been assigned an Enterprise Role with appropriate privileges, access to OTBI Enterprise dashboards and analyses is prohibited. This includes the provisioned Administrator.

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17. In the Welcome email, click the My Services URL to open the My Services dashboard, where you can view service metrics for OTBI Enterprise and the Cloud Storage Service. My Services is also where you access the Users tab to create required Enterprise Roles and add users and assign roles to manage security.
18. Log in using your credentials and add Enterprise Roles, additional users, and assign roles.

Follow the workflow in [Setting Up Security in OTBI Enterprise](#).

## Setting Up Security in OTBI Enterprise

Perform the high-level steps for setting up security in OTBI Enterprise.

Before you start, you might review the following information to familiarize yourself with security terminology and concepts, in particular, how Enterprise Roles and Duty Roles control user privileges:

- [OTBI Enterprise Security and Roles: Explained](#)
- [About Required Enterprise Roles](#)
- [Adding a Custom Enterprise Role](#)
- [Managing Users and Roles](#)

High-level steps for setting up security:

1. In My Services, create required Enterprise Roles.

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**Note:** Until a user has been assigned an Enterprise Role with appropriate privileges, access to OTBI Enterprise dashboards and analyses is prohibited. This includes the provisioned Administrator.

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2. In My Services, create user accounts for people who will access the BI dashboards and reports.
3. If you are deploying Taleo, in your Taleo application, create a new user and assign it the default user type **System Integration (Administrator WebTop)**.

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**Note:** Use this username and password during the Initial Configuration stage when you register the Taleo data source in Configuration Manager. If you are not able to create this user, then contact the Taleo administrator. For information about the System Integration (Administrator WebTop) permissions, use the MyOracle Support document Taleo Enterprise Documentation Homepage (Doc ID 1496352.1) to download the User Type Permissions spreadsheet for your Taleo version.

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4. Log a Service Request to provision access to the ODI Console by Oracle Cloud Operations.
5. Assign administrative Enterprise Roles to appropriate users:
  - a. Assign the ASM\_APPLICATION\_IMPLEMENTATION\_ADMIN\_ABSTRACT Enterprise Role that is provisioned with the service to one or more users responsible for the implementor role in OTBI Enterprise. This role provides privileges to access Configuration Manager and Functional Setup Manager, as well as ODI.
  - b. In Fusion, grant access to users of the BI Cloud Connector Console.  
  
See [Provisioning a User for Oracle Business Intelligence Cloud Connector Access](#).
6. Assign each user to the appropriate Enterprise Roles.

## Provisioning a User With Access to BI Cloud Connector Console

Use these steps to provide additional users access to the BI Cloud Connector Console. BI Cloud Connector Console is an implementor tool used to set up OTBI Enterprise.

For Fusion Applications HCM Cloud Release 9.2, the SR that you create to deploy the BI Cloud Connector Console performs the setup for the identified user; these steps are needed only if additional users need to access the console. For Release 10, you need to create and provision this user as part of your deployment.

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**Note:** You provision BI Cloud Connector Console users in the Fusion Applications APM environment, that is, not in the OTBI-Enterprise environment.

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To provision a user for BI Cloud Connector access:

1. Create a new user in Fusion Applications, or use an existing user in Fusion Applications.
2. Using Oracle Authorization Policy Manager (APM), assign the following to the new or existing user:
  - ESSAPP stripe, Application role – ESSAdmin (this is for the ability to schedule and monitor the BI connector ESS jobs)
  - OBI stripe, Enterprise Role – ASM\_APPLICATION\_IMPLEMENTATION\_ADMIN\_ABSTRACT (this is for the ability to access BICCC user interface)

See Mapping External Users to an Application Role.

## About Administration Tools

Administrators and implementors with the correct privileges can access administration tools from links on the left side of the Oracle BI Answers user interface.

Administration tools include:

- **Configuration Manager:** Used by implementors to perform setup and configuration, maintenance and functional setups, and to create, manage, schedule and execute load plans to load data into the OTBI Enterprise data warehouse for analysis by BI end users.
- **Service Console:** Used by administrators to manage users and roles, perform administrative tasks, and to monitor and view metrics about a service.
- **ODI Console:** Used by implementors and administrators to view details about load plan execution and to monitor data loads to the OTBI Enterprise data warehouse.

### Tools

Configuration Manager  
Service Console  
ODI Console



OTBI Enterprise Academy

For information about the administrative roles and associated tool access privileges, see [About Required Enterprise Roles](#).



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## About OTBI Enterprise Security

All OTBI Enterprise users with appropriate roles can access dashboards and reports as well as create new analyses and dashboards using data from subject areas relevant to their job functions.

Enterprise Roles and Duty Roles determine object and data security in OTBI Enterprise. Enterprise Roles and Duty Roles are referred to differently in some Oracle products.

- An Enterprise Role consists of a specific job consisting of duties, such as human resources line manager, recruiting vice president, or application implementation administrator. This role is associated with one or more users directly, and inherits a set of Duty Roles that provide access to functionality and data within the application. An administrator creates required Enterprise Roles as part of your security implementation.
- A Duty Role is a group of functional and data privileges representing one duty of a job, such as compensation analysis or recruitment analysis. Duty roles are not assigned directly to users, but associated to one or more Enterprise Roles, through which a user obtains the privileges of the duty. For example, access to specific Subject Areas, Dashboards, reports, and the application of data filters are controlled by the Duty Role a user inherits through their assigned Enterprise Roles.

### Topics:

- [About Terminology Used In Security](#)
- [About Required Enterprise Roles](#)
- [What Security Levels Does OTBI Enterprise Use?](#)
- [What Tools Configure Security in OTBI Enterprise?](#)

### About Terminology Used In Security

As you familiarize yourself with security concepts used in OTBI Enterprise, there are differences in terminology that is used in the software and documentation.

- Enterprise Roles are also referred to as Groups, or Job Roles. For example:
  - the term Enterprise Role is used in this guide, and in Fusion Applications.This guide uses the term Enterprise Role unless referring to tools that use the term Group or Job Role.
- Duty Roles are also referred to as Application Roles. For example:
  - the term Duty Role is used in this guide and in Fusion Applications.

- the term Application Role is used in Oracle Enterprise Manager Fusion Middleware Control and Oracle WebLogic Server Administration Console.

This guide uses the term Duty Role unless referring to tools that use the term Application Role.

## About Required Enterprise Roles

Enterprise Roles are assigned to users to enforce security.

There are three Enterprise Roles used for Human Capital Management in OTBI Enterprise users, and three for Administrators and Implementors. An administrator must create and assign these roles in My Services. For more information about creating roles in My Services, see [Adding a Custom Enterprise Role](#).

### Required Enterprise Roles

The table below describes the Enterprise Roles required to secure OTBI Enterprise for Human Capital Management, including the Display Name and Role Name for each used when creating them and the Subject Areas and Web Catalog folders they provide access to. The Business Intelligence Service Administrator role inherits all of the Business Intelligence Content Administrator role's subject area access, and additionally is given access to the administration Tools links to Configuration Manager, Service Console, and ODI Console in the Answers home page. Access to the Configuration Manager and ODI Console are provided by the BIACM Access Role.

Display Name	Role Name	Description	Access	Subject Area Access
Human Resources VP	BIA_HCM_HRVP_JOB	Chief Human Resources Officer who is responsible for overall Human Resources programs and functions.	Oracle BI Enterprise Edition (/analytics) BI Publisher (/xmlpsrver) Mobile Application Designer (/mobile)	Human Resources - Absence and Leave Accrual Human Resources - Compensation Human Resources - Workforce Compensation Human Resources - Payroll Human Resources - Succession Planning Human Resources - Recruitment Human Resources - Talent Management Human Resources - Workforce Frozen Snapshots Human Resources - Workforce Deployment Human Resources - Workforce Generic Hierarchy Gains and Losses Human Resources - Time and Labor Human Resources - Workforce Effectiveness Human Resources - Workforce Gains and Losses Human Resources - Learning Enrollment and Completion

Human Resources Line Manager	BIA_HCM_LINEM GR_JOB	A manager or business leader who oversees a group of workers, a department or a business unit.	Oracle BI Enterprise Edition (/analytics) BI Publisher (/xmlpsrver) Mobile Application Designer (/mobile)	Human Resources - Absence and Leave Accrual Human Resources - Compensation Human Resources - Workforce Compensation Human Resources - Recruitment Human Resources - Talent Management Human Resources - Workforce Deployment Human Resources - Workforce Frozen Snapshots Human Resources - Workforce Gains and Losses Human Resources - Workforce Generic Hierarchy Gains and Losses Human Resources - Succession Planning Human Resources - Time and Labor
Recruiting VP	BIA_HCM_RCRT MTVP_JOB	Head of recruiting who is responsible for the recruiting program and delivery.	Oracle BI Enterprise Edition (/analytics) BI Publisher (/xmlpsrver) Mobile Application Designer (/mobile)	Human Resources - Recruitment Human Resources - Workforce Deployment Human Resources - Workforce Frozen Snapshots Human Resources - Workforce Generic Hierarchy Gains and Losses

Business Intelligence Content Administrator	BI_CONTENT_ADMINISTRATOR	Administrator of Business Intelligence content in the Web Catalog.	Oracle BI Enterprise Edition (/analytics) BI Publisher (/xmlpsserver) Mobile Application Designer (/mobile)	Human Resources - Absence and Leave Accrual Human Resources - Compensation Human Resources - Workforce Compensation Human Resources - Learning Enrollment and Completion Human Resources - Payroll Human Resources - Recruitment Human Resources - Succession Planning Human Resources - Talent Management Human Resources -Time and Labor Human Resources - Workforce Deployment Human Resources - Workforce Effectiveness Human Resources - Workforce Frozen Snapshots Human Resources - Workforce Gains and Losses Human Resources - Workforce Generic Hierarchy Gains and Losses
Business Intelligence Service Administrator	BI_SERVICE_ADMINISTRATOR	Administrator of OTBI Enterprise service.	Service Administration Console (/biserviceadministration) Oracle BI Enterprise Edition (/analytics) BI Publisher (/xmlpsserver) Mobile Application Designer (/mobile)	Human Resources - Absence and Leave Accrual Human Resources - Compensation Human Resources - Workforce Compensation Human Resources - Learning Enrollment and Completion Human Resources - Payroll Human Resources - Recruitment Human Resources - Succession Planning Human Resources - Talent Management Human Resources -Time and Labor Human Resources - Workforce Deployment Human Resources - Workforce Effectiveness Human Resources - Workforce Frozen Snapshots Human Resources - Workforce Gains and Losses Human Resources - Workforce Generic Hierarchy Gains and Losses



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BIACM	ASM_APPLICATION_ADMINISTRATOR_ABSTRACT	Implementor/ Administrator of OTBI Enterprise service.	Configuration Manager (/biacm) Functional Setup Manager (/setup) ODI Console (/odiconsole)
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### Catalog Folders for BIA\_HCM\_HRVP\_JOB

These catalog folders are in the Shared Folders directory.

/Custom/Dashboards

/Custom/Human Capital Management

/Custom/Subject Area Contents

/Human Capital Management/Analytic Library/Absence

/Human Capital Management/Analytic Library/Accrual

/Human Capital Management/Analytic Library/Compensation

/Human Capital Management/Analytic Library/Payroll

/Human Capital Management/Analytic Library/Performance Management

/Human Capital Management/Analytic Library/Prompts

/Human Capital Management/Analytic Library/Recruitment

/Human Capital Management/Analytic Library/Retention

/Human Capital Management/Analytic Library/Talent Management

/Human Capital Management/Analytic Library/Time and Labor

/Human Capital Management/Analytic Library/Workforce Profile

/Human Capital Management/Dashboards/HR Executive Dashboard

/Human Capital Management/Role Dashboards/HR Executive

/Human Capital Management/Subject Area Contents/Human Resources - Absence and Leave Accrual

/Human Capital Management/Subject Area Contents/Human Resources - Compensation

/Human Capital Management/Subject Area Contents/Human Resources - Learning Enrollment and Completion

/Human Capital Management/Subject Area Contents/Human Resources - Payroll

/Human Capital Management/Subject Area Contents/Human Resources - Recruitment

/Human Capital Management/Subject Area Contents/Human Resources - Retention

/Human Capital Management/Subject Area Contents/Human Resources - Talent Profile Management

/Human Capital Management/Subject Area Contents/Human Resources - Time and Labor

/Human Capital Management/Subject Area Contents/Human Resources - Workforce Deployment

/Human Capital Management/Subject Area Contents/Human Resources - Workforce Effectiveness

/Human Capital Management/Subject Area Contents/Human Resources - Workforce Gains and Losses

/Monitoring

### **Catalog Folders for BIA\_HCM\_LINEMGR\_JOB**

These catalog folders are in the Shared Folders directory.

/Custom/Dashboards

/Custom/Human Capital Management

/Custom/Subject Area Contents

/Human Capital Management/Analytic Library/Absence

/Human Capital Management/Analytic Library/Accrual

/Human Capital Management/Analytic Library/Compensation

/Human Capital Management/Analytic Library/Performance Management

/Human Capital Management/Analytic Library/Prompts

/Human Capital Management/Analytic Library/Recruitment

/Human Capital Management/Analytic Library/Retention

/Human Capital Management/Analytic Library/Talent Management

/Human Capital Management/Analytic Library/Time and Labor

/Human Capital Management/Analytic Library/Workforce Profile

/Human Capital Management/Subject Area Contents/Human Resources - Absence and Leave Accrual

/Human Capital Management/Subject Area Contents/Human Resources - Compensation

/Human Capital Management/Subject Area Contents/Human Resources - Recruitment

/Human Capital Management/Subject Area Contents/Human Resources - Retention

/Human Capital Management/Subject Area Contents/Human Resources - Talent Profile Management

/Human Capital Management/Subject Area Contents/Human Resources - Time and Labor

/Human Capital Management/Subject Area Contents/Human Resources - Workforce Deployment

/Human Capital Management/Subject Area Contents/Human Resources - Workforce Gains and Losses

/Monitoring

### **Catalog Folders for BIA\_HCM\_RCRTMTVP\_JOB**

These catalog folders are in the Shared Folders directory.

/Custom/Dashboards

/Custom/Human Capital Management

/Custom/Subject Area Contents  
 /Human Capital Management/Analytic Library/Performance Management  
 /Human Capital Management/Analytic Library/Prompts  
 /Human Capital Management/Analytic Library/Recruitment  
 /Human Capital Management/Analytic Library/Retention  
 /Human Capital Management/Analytic Library/Workforce Profile  
 /Human Capital Management/Subject Area Contents/Human Resources -  
 Recruitment  
 /Human Capital Management/Subject Area Contents/Human Resources - Retention  
 /Human Capital Management/Subject Area Contents/Human Resources - Workforce  
 Deployment  
 /Monitoring

## What Security Levels Does OTBI Enterprise Use?

Security in OTBI Enterprise can be classified broadly into these levels: object, data, and user.

- **Object-level security.** Object-level security is driven by Duty Roles and controls the visibility to logical business objects based on a user's role. Object-level security determines access to business models and subject areas, and for Web objects, such as dashboards and dashboard pages, which are defined in the catalog. Duty Roles are associated with Enterprise Roles, so that ultimately object-level security is inherited through Enterprise Role assignments for each user.
- **Data-level security.** Data-level security controls the visibility of data (content rendered in subject areas, dashboards, Oracle BI Answers, and so on) based on the user's association to data in the transactional system.
- **User-level security (authentication of users).** User-level security refers to authentication and confirmation of the identity of a user based on the credentials provided.

## What Tools Configure Security in OTBI Enterprise?

Use these tools to manage security settings in OTBI Enterprise.

- **Oracle Cloud My Services page**  
Use the My Services page to set up and assign custom enterprise roles, and to manage users. For detailed information, see [Managing Users and Roles](#).
- **Configuration Manager**  
Use Configuration Manager to set up data security.
- **Authorization Policy Manager**  
Use Fusion Authorization Policy Manager to provision a user with privileges required by the BI Cloud Connector Console. For more information, see [Provisioning a User for Cloud Extract](#).



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## Managing Users and Roles

You can use the My Services Users page to manage users, Enterprise Roles, user-Enterprise Role assignments, and passwords.

### Topics:

- [What Can You Do from the My Services Users Page?](#)
- [Roles and User Accounts Predefined in My Services](#)
- [Managing User Accounts](#)
- [Creating One User Account at a Time](#)
- [Importing a Batch of User Accounts](#)
- [Modifying a User Account](#)
- [Removing a User Account](#)
- [Searching, Filtering, and Sorting the List of User Accounts](#)
- [Viewing the List of Predefined System Roles](#)
- [Adding and Removing Custom Roles](#)

### What Can You Do from the My Services Users Page?

As an identity domain administrator, you use options on the My Services Users page to manage users and their roles for OTBI Enterprise.

These tabs appear on the My Services Users page.

Tab on Users Page	Description
Users	Add user accounts, import a batch of user accounts, assign roles to users, modify user accounts, reset passwords, and remove user accounts. See <a href="#">Managing User Accounts</a> .
Roles	View a list of all of the OTBI Enterprise Enterprise Roles and link to a list of users assigned to the role you select. See <a href="#">Viewing the List of Predefined System Roles</a> .
Custom Roles	View, add, and remove Enterprise Roles that you created to support OTBI Enterprise. See <a href="#">Adding and Removing Custom Roles</a> .

## Roles and User Accounts Predefined in My Services

After OTBI Enterprise is provisioned, Oracle Cloud creates a set of predefined roles and user accounts in My Services.

The predefined roles:

- Include both administrative roles and non-administrative roles.
- Give certain privileges to the users based on the role assigned to them. Users can be assigned more than one role.

The predefined roles include:

- [Identity Domain Administrator Role](#)
- [Service Administrator Role](#)

Administrative individuals are automatically granted the predefined roles that correspond to their administrator role.

For example, the service administrator for OTBI Enterprise is given the *Service-name rolename* predefined role.

In addition, an identity domain administrator is granted the Identity Domain Administrator predefined role when an identity domain is first set up. If an individual is both the identity domain administrator and the service administrator, then the individual is automatically assigned the **Identity Domain Administrator** and the **Administrator** predefined roles.

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**Note:**

If an individual is both the service administrator and the identity domain administrator, one user account is created for that individual and then assigns multiple roles to the user.

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### Identity Domain Administrator Role

As an identity domain administrator, you use the My Services application to manage your own users and their roles. Your view in the My Services application is limited to the users and roles in the identity domains that you have been assigned to manage. You see all the roles at the domain and service levels.

The identity domain administrator role gives a user the following privileges:

- Access to all user and role management functions in My Services, including:
  - [Managing User Accounts](#)
  - [Adding and Removing Custom Roles](#)

### Service Administrator Role

As a service administrator, your view in My Services is limited to the users and roles for the services that you are assigned to manage. You see only the roles at the service level. In addition, you are limited to mostly search, view, and read-only functions. For example, you cannot create roles or user accounts, but you can assign an existing role to an existing user account.




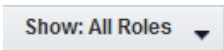
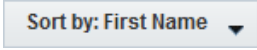

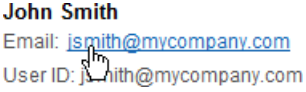
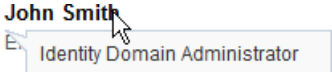
The service administrator role gives a user the following privileges:

- Access to some security features in the My Services application, including:
  - Managing the Roles Assigned to a User
  - Displaying Roles and User Assignments
- Access to other features in the My Services application, including service and usage monitoring.

## User Accounts Management

Manage user accounts, assign roles, and reset passwords by using the Users tab on the My Services Users page.

In the Users tab, the full name is displayed according to the user's selected language preference. For example, in English locale, the full name is displayed in the format `givenname familyname`. For example, if English is the selected language, then the full name is displayed in the format `givenname familyname`. Asian languages, such as Japanese or Chinese, display the full name is displayed in the format `familyname givenname`.

Element	Description
	Click <b>Add</b> to create a single user account. See <a href="#">Creating One User Account at a Time</a> .
	Click <b>Import</b> to create a batch of user accounts by loading a Comma Separated Values (CSV) file. See <a href="#">Importing a Batch of User Accounts</a> .
	Use the <b>Search</b> field to find one or more user accounts based on the search criteria you enter. See <a href="#">Searching, Filtering, and Sorting the List of User Accounts</a> .
	Use the <b>Show</b> filter to display only the users who are assigned the role you select from the list.
	Use the <b>Sort by</b> filter to list the user accounts by first name or by last name.
	Click the <b>Action</b> icon to select options for: <ul style="list-style-type: none"> <li>• <a href="#">Modifying a User Account</a></li> <li>• <a href="#">Removing a User Account</a></li> </ul>
	Click the email link to send a message to the user. Email: <a href="mailto:jsmith@mycompany.com">jsmith@mycompany.com</a> User ID: <a href="#">jsmith@mycompany.com</a>
	Position the cursor over the user name to display the roles assigned to the user. Identity Domain Administrator

Only identity domain administrators can manage user accounts, and they are allowed to add, modify, and remove user accounts only in an identity domain that they have been designated to administer.

After a user account has been created, either an identity domain administrator or a service administrator can manage the roles assigned to a user. For information about managing roles, see [Roles and User Accounts Predefined in My Services](#).

## Creating One User Account at a Time

Create one user account.

Only identity domain administrators can create user accounts, and only in the identity domains that they are assigned to manage. To create many user accounts at once, see [Importing a Batch of User Accounts](#).

To add a user account, you need the following information:

- The first name and last name of the user
- A valid business email address for the user
- The services that the user is allowed to access

To create one user account at a time:

1. Sign in to My Services. Be sure to specify the appropriate identity domain.
2. Click **Users**.
3. Click the **Users** tab.
4. Click **Add**.
5. Enter the following details in the Add User dialog box:
  - **First Name:** Enter the user's first name.
  - **Last Name:** Enter the user's last name.
  - **Email:** Enter a valid business email in standard format. For example, johndoe@somecompany.com. Special characters are allowed within email addresses. However, specifying an improperly formatted email address results in a validation error message.
  - **Use email as user name:** The user name is the unique identifier for the user. The user enters this value in the User Name field when signing in to Oracle Cloud.  
  
If this check box is selected, then the system automatically makes the user name the same as the email address *unless* the user name is currently in use or had previously been in use within the current domain. For these cases, the system adds a number to the email address to create a unique value for the user name.
  - **User Name:** If you deselect the **Use email as user name** check box, then you can enter a unique user name for the user. The user name, along with the password and the name of the identity domain, define a user's sign-in credentials. The User Name field accepts spaces between characters.
  - **Manager Email:** Specify the email address of the user's manager. You can also search for the manager email by using the search (magnifying glass) icon. This field is optional.
6. Assign one or more roles to this user. Roles control access to applications, resources, and services.



You can select one or more roles, and then use the left and right arrows to shuttle roles back and forth between the Available Roles column and the Assigned Roles column.

- To select a single role, click the role.
- To select a consecutive group of roles, click the first role you want in the group, press and hold down the Shift key, and then click the last role you want in the group.
- To select non-consecutive roles, press and hold down the Ctrl key, and then click each role you want to select.

Alternatively, click the double right arrow to assign all available roles to the user.

#### 7. Click **Add**.

The system adds an account for the user and displays a message if the user account was created successfully.

After the user account is created, Oracle Cloud sends an email notifying the user that an account was created. The email includes the following sign-in credentials:

- The user's sign-in name.
- A temporary password. Users are forced to change their temporary password when they sign in the first time.
- The name of the identity domain.

The user has the required credentials to sign in, but needs to know the appropriate URLs. The identity domain administrator or the service administrator must:

- Provide the URL for the My Services application to the user.
- Provide one or more service URLs to the user, depending on the services the user is allowed to access.

Identity domain administrators and service administrators can modify an existing user account and change the roles assigned to a user. Roles control access to applications, resources, and services. If users forget their password, identity domain administrators can reset it.

## Importing a Batch of User Accounts

Identity domain administrator can import a batch of users accounts by using a comma-separated values (CSV) file that lists the information required to set up each user account. Make sure the user logins match the Fusion user name.

### Task 1: Create a Comma-Separated Values File

The CSV file is a simple text file in a tabular format (rows and columns). The first row in the file, which defines the columns (fields) in your table, must have these exact column headings:

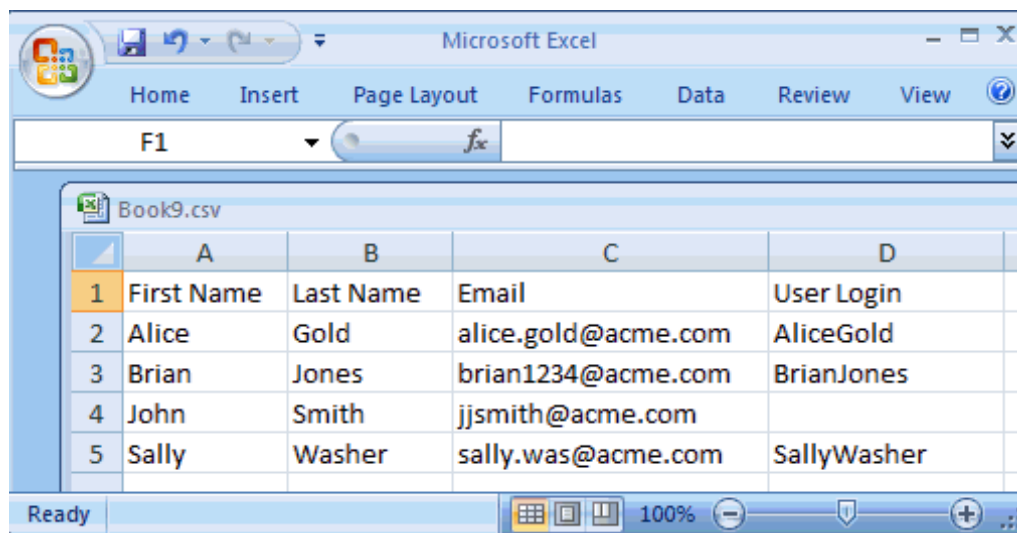
- First Name
- Last Name

- Email
- User Login

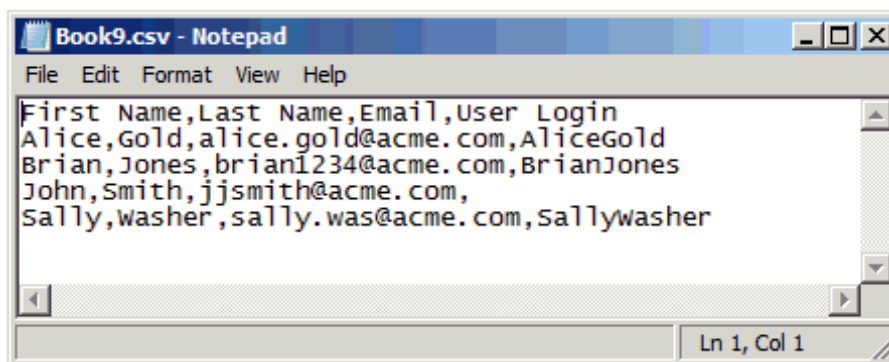
For each user account, you create a new row (line) and enter data into each column (field). Each row equals one record.

To create a CSV file, you can use a standard spreadsheet application, such as Microsoft Excel or Google Spreadsheet, or you can use a text editor, such as Notepad or TextPad. You must be sure to save the file in a valid CSV format.

Spreadsheet applications make it easy to create, edit, and save CSV files. You can use standard features to add and delete rows of data, edit individual fields, search for records, or sort the list. The illustration shows an example of user account data defined in a Microsoft Excel file. The layout lets you easily review the data.



When you save your spreadsheet as type **CVS (Comma delimited) (\*.csv)**, a comma separates the values in each row. For example, the illustration shows the data from the Microsoft Excel spreadsheet, saved as a CSV file, and opened in Notepad:



The CSV file must adhere to the following requirements:

- Must be ANSI or UTF-8 encoded.
- Must not be larger than 256 KB (maximum file size).
- Must use a comma as the delimiter between the values.

- Must include three columns with these exact headings: **First Name**, **Last Name**, and **Email**.
- May include an optional fourth column with this exact heading: **User Login**. The User Login should be the same as the FUSION user name, as it will in some cases affect the data security applied to the user. For example, for My Territories in sales the username is used to enforce data security.

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**Note:**

In the CSV file, the column heading is User Login. However, the value you enter in the User Login column maps to the User Name on the Users page in My Services. This value, also called the user name, is the name the user enters on the Sign In page.

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The user name (that is, the value in the User Login column), along with the password and the name of the identity domain, define a user's sign-in credentials.

If you do not include a value in the User Login column, the system makes the user name the same as the email address unless the user name is currently in use or had previously been in use within the current domain. For these cases, the system adds a number to the email address to create a unique value for the user name.

The maximum length of the user name is 80 characters.

## Task 2: Import the Comma-Separated Values File

To import a comma-separated values (CSV) file and automatically add a batch of user accounts to the identity management system:

1. Sign in to My Services. Be sure to specify the appropriate identity domain.
2. Click **Users**.
3. Click the **Users** tab.
4. Click **Import**.
5. Enter the name of the CSV file to import. Alternatively, you can click **Browse** to locate and select the CSV file to use.
6. Click **Import**. A message confirms that the import is in progress.

The system begins the process of creating the user accounts. The time required to create the user accounts depends on several factors such as system load, import requests in progress, and number of user entries in the CSV file.

When the processing of the CSV file is finished, you receive an email with the following subject line:

**User Loading completed**

The email provides the following information:

- The total number of user records processed in the CSV file
- The number of user records successfully uploaded
- The number of user records that failed

- Details about failure and errors, if any

### **Task 3: Review and Fix Any Reported Errors**

In the **User Loading completed** email that you receive from Oracle Transactional Business Intelligence Enterprise, review the list of errors, if any. Some of the reasons the system could not create a user account include:

- Invalid email format
- Missing information
- User account already exists
- Invalid CSV file

If there are only a few invalid accounts, you may want to create these user accounts manually. See [Creating One User Account at a Time](#) for details.

If there are many invalid accounts, you may want to create a new CSV file and import the file again.

### **Task 4: Assign Roles and Provide Access Details to Users**

After the user accounts are created, you must explicitly assign one or more roles to the users. Roles control access to applications, resources, and services. For more information, see .

When you use the Import function in My Services to add user accounts, the system automatically generates a temporary password for each user. After the processing of the CSV file is finished and the user accounts are created, Oracle Transactional Business Intelligence Enterprise automatically sends your users an email with details about the account created for them.

The email includes the following sign-in credentials:

- The user's sign-in name (also referred to as the user login).
- A temporary password. Users are forced to change their temporary password when they sign in the first time.

If users forget their password, identity domain administrators can reset it.

- The name of the identity domain.

The user has the required credentials to sign in, but needs to know the appropriate URLs. The identity domain administrator or the service administrator must:

- Provide the URL for the My Services application to the user.
- Provide the Oracle Transactional Business Intelligence Enterprise URL to the user.

## **Modifying a User Account**



Only identity domain administrators can modify a user account, and only in the identity domains they are assigned to manage.

- You can modify a user's first name, last name, and email address.
- You cannot modify the user name. The user name is the unique identifier that the user enters to sign in to Oracle Cloud.

To modify a user account:

1. Sign in to My Services.

Be sure to specify the appropriate identity domain.

2. Click **Users**.
3. Click the **Users** tab.
4. Enter all or part of the user's first name, last name, email address, or user name in the **Search** field, and then click  **Search**.
5. Click  **Action** next to the user account you want to change, then select **Modify**.
6. Make your changes to the user account.
7. Click **Save**.

## Removing a User Account



Only identity domain administrators can remove a user account, and only in the identity domains they are assigned to manage.

You cannot remove your own user account. The **Remove** option is grayed out.

To remove a user account:

1. Sign in to My Services.

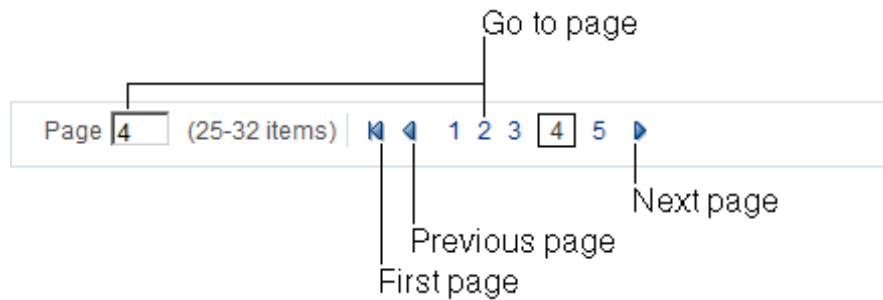
Be sure to specify the appropriate identity domain.

2. Click **Users**.
3. Click the **Users** tab.
4. Enter all or part of the user's first name, last name, user name, or email address in the **Search** field, and then click  **Search**.
5. Click  **Action** next to the user account you want to remove, then select **Remove**.  
The system prompts for confirmation before removing the user account.
6. Click **Remove** to confirm that you want to delete the selected user account.




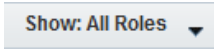
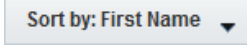
## Searching, Filtering, and Sorting the List of User Accounts

The **Users** tab on the My Services **Users** page displays a list of your users. By default, the tab displays the list of users in alphabetic order by first name.

Use the controls at the bottom of the page to navigate to a page by its number, or to go to the first page, previous page, or next page.



If you manage a lot of users, then finding a particular user account can be a challenge. The table describes a few tools and tips to help you find user accounts more effectively.

Tool	Description
	<p>In the Search box, type any part of a user's first name, last name, email, or user name, and then click  <b>Search</b>.</p> <p>The search finds all user accounts that match the text you typed into the Search box. The search is case-insensitive. For example, entering jo will find Jo, Joe, Alejo, Jon, Jonathan, bsmith@join.com, and kevin.johnson@yourcompany.com.</p> <p>To clear a search, remove the search criteria in the Search box and click  <b>Search</b>.</p>
	<p>To filter the list and show only the users who are assigned a particular role, select a role from the <b>Show</b> list.</p> <p>By default, the Users tab displays all users.</p>
	<p>To sort the list by first name or by last name, select the option from the <b>Sort by</b> list.</p> <p>By default, the Users tab displays the list of users in alphabetic order by first name.</p>

When you navigate to another page in My Services and then return to the Users tab on the Users page, the system automatically returns to the following default values:

- Clears the search criteria
- Sets the Show filter to display all users
- Sorts the list in alphabetic order by first name

## Viewing the List of Predefined System Roles

View a list of all the predefined roles.

1. Sign in to My Services.

Be sure to specify the appropriate identity domain.

2. Click **Users**.

3. Click the **Roles** tab.

For each predefined role, the Roles tab displays the following information:

- The display name for the role
- **User Assignments:** the number of users who are assigned the role
- **Role Name:** the internal Oracle name for the role
- **Description:** More information about the role and its related identity domain or service instance



**Identity Domain Administrator**

User Assignments: 1

Role Name: TenantAdminGroup

Description: Administrator Role for Identity Domain pbcdomain

Note that the User Assignments field displays the number of users who are assigned the role. To view a list of the users who are assigned a particular role, click the role. The system automatically:

- Navigates to the Users tab
- Sets the Show filter to the role you selected
- Lists only those users who are assigned that role

You can select other options from the Show filter to show users assigned to a different role or to show all users (that is, users assigned to any role).

## Adding and Removing Custom Roles

Use the **Custom Roles** tab on the My Services Users page to view, add, and remove enterprise roles required by OTBI Enterprise .

### Topics:

- [About Custom Roles](#)
- [Viewing Existing Custom Roles](#)
- [Adding a Custom Enterprise Role](#)
- [Removing a Custom Enterprise Role](#)

## About Custom Enterprise Roles

Only identity domain administrators can create and delete custom roles, and only in the identity domains that they have been assigned to administer.

Custom Enterprise Roles are used to provide object security in OTBI Enterprise.

Duty Roles specified in application deployment descriptors are mapped to the Enterprise Roles created in the identity management system. The mapping is based on matching fully qualified role names.

For a complete list of the Enterprise Roles you need to create to support OTBI Enterprise security, see [About Required Enterprise Roles](#)

## Viewing Existing Custom Roles

View the custom Enterprise Roles already available in the current identity domain.

1. Sign in to My Services. Be sure to specify the appropriate identity domain.
2. Click **Users**.
3. Click the **Custom Roles** tab.

For each custom role, the tab displays the following information:

- The display name for the role. You see this name whenever My Services needs to display the name of the role, for example, in the Show filter on the Users tab, in the Manage Roles dialog box, and on the Custom Roles tab.
- **User Assignments:** the number of users who are assigned the role.
- **Role Name:** the internal name for the role.
- **Description:** a brief description of the role. This field includes information only if the user who added the Enterprise Role entered details about the role. Including a description is optional.

If the number of Enterprise Roles cannot display on one page, then use the controls at the bottom of the page to navigate to a page by its number, or to go to the first page, previous page, or next page.

Note that the User Assignments field displays the number of users who are assigned the custom role. To view a list of the users who are assigned a particular custom role, click the role. The system automatically:

- Navigates to the Users tab
- Sets the Show filter to the Enterprise Role you selected
- Lists only those users who are assigned that role

You can select other options from the Show filter to show users assigned to a different role or to show all users (that is, users assigned to any role).

## Adding a Custom Enterprise Role

Create custom Enterprise Roles to support OTBI Enterprise security.

To add a custom role:

1. Sign in to My Services. Be sure to specify the appropriate identity domain.
2. Click **Users**.
3. Click the **Custom Roles** tab.
4. Click **Add**. The Add Custom Role dialog box opens.
5. Complete the Add Custom Role dialog box as follows:
  - **Role Name:** Enter a unique name for this custom role. The role name is the internal name.



- **Display Name:** Optionally, enter a display name for this custom role. You see this name whenever My Services needs to display the name of the role, for example, in the Show filter on the Users tab, in the Manage Roles dialog box, and on the Custom Roles tab.

If you do not enter a display name, the system uses the same value that you specified for the role name.

- **Description:** Optionally, enter more information about this custom role.

6. Click **Add**. The system closes the Add Custom Role dialog box and returns to the Custom Roles tab.

You can scroll through the pages to view the role you just added.

For information about the enterprise roles you need to create to support OTBI Enterprise, see [About Required Enterprise Roles](#).



## Removing a Custom Enterprise Role

If you are an identity domain administrator, you can remove custom roles.

The following restrictions apply:

- You cannot remove a custom role if users are currently assigned the role. In this case, you must first remove the role from the users.
- You can remove custom roles only. You cannot remove any of the predefined roles displayed on the Roles tab.

To remove a custom enterprise role:

1. Sign in to My Services. Be sure to specify the identity domain that has the custom role you want to remove.
2. Click **Users**.
3. Click the **Custom Roles** tab.
4. Locate the custom role you want to remove.
5. Look at the number in the **User Assignments** field.
  - If the number of users assigned to this role is 0 (zero), then skip to the next step.
  - If users are currently assigned the custom role, you must first revoke the role from the users before you can remove the role.
    - Click the name of the custom role to view all the users assigned to the role.
    - For each user assigned the role, click  **Action**, then select **Manage Roles**. Move the custom role from the Assigned Roles column to the Available Roles column. Save your changes.
    - Click the **Custom Roles** tab.
    - Locate the custom role you want to remove. The number in the **User Assignments** field should now be 0 (zero).
6. Click  **Action**, then select **Remove**.

The system prompts for confirmation before removing the custom role.

7. Click **Remove** to confirm that you want to remove the selected custom role.

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## Migrating From Test to Production

To migrate between Test and Production environments of the same version, use the Service Console to migrate your OTBI Enterprise system state and Configuration Manager to migrate setup data.

### Topics:

- [Migrating From Test to Production](#)

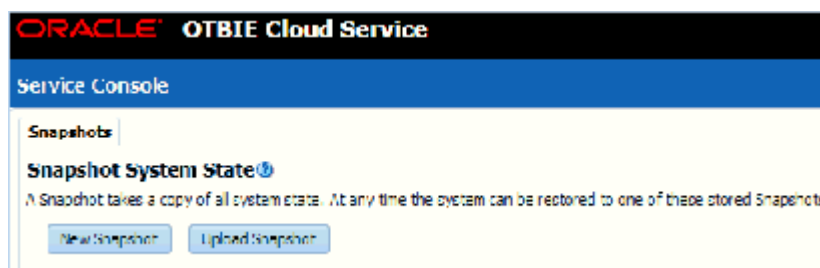
### Migrating OTBI Enterprise From Test to Production


Transfer OTBI Enterprise system state and configurations from your stage environment to your production environment.

Use snapshots to migrate catalog objects. For more information about snapshots, see [About Snapshots](#)

To migrate your OTBI Enterprise service from test to production:

1. Migrate the OTBI Enterprise service system state:
  - a. In the test environment, log in to the Service Console and click **New Snapshot** in the Snapshots tab.



- b. In the New Snapshot dialog box, enter a Description for the system state. For example, you could enter the purpose of the snapshot, if it's migrating from test to production.
    - c. Click **OK**.
    - d. Click the **Manage Snapshot**  icon for the new snapshot and select **Download**.
    - e. In the Snapshot Download dialog box, enter and confirm a Snapshot Password and click **OK**.

The Snapshot is stored as a Business Intelligence Archive (BAR) file in the local area.

- f. Copy the BAR file from the stage environment to the production environment.
- g. In the production environment, log in to the Service Console and click **Upload Snapshot**.
- h. In the Upload Snapshot dialog box, click **Browse**.
- i. In the File Upload dialog box, locate the BAR file you copied from the stage environment and click **Open**.
- j. In the Upload Snapshot dialog box, enter the Snapshot Password and click **OK**.

A confirmation stating “Snapshot Restore Completed Successfully” is displayed.

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**Note:** This replaces the custom catalog content, other than user folders, in the production environment.

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- 2. Migrate Configuration Manager setup data:
  - a. In the test Environment, select **Export Setup Data** from the Tasks bar in Configuration Manager.
  - b. Click **Export Data** to display the Export Data dialog box.
  - c. In the Export Data dialog box, select all check boxes in the Setup Objects to Export list and click **Export**.
  - d. Save the export file.  
  
The Setup Data file is stored in the local area.
  - e. In the production environment, select **Import Setup Data** from the Tasks bar in Configuration Manager.
  - f. In the Import Setup Data dialog box, specify the location and name of the Setup Data file you exported from the stage environment.

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# Backing Up and Restoring

This topic describes how to back up and restore content using a file called a snapshot.

## Topics:

- [Typical Workflow for Backing Up and Restoring](#)
- [About Snapshots](#)
- [Taking Snapshots and Restoring Information](#)
- [Downloading, Uploading, and Migrating Snapshots](#)

## Typical Workflow for Backing Up and Restoring

Here are the common tasks to back up and restore your content using snapshots.

Task	Description	More Information
Take a snapshot	Capture content that users have saved to the catalog in Oracle Transactional Business Intelligence Enterprise at a point in time.	<a href="#">Taking a Snapshot</a>
Restore from a snapshot	Restore the system to a previously working state.	<a href="#">Restoring from a Snapshot</a>
Delete a snapshot	Delete unwanted snapshots.	<a href="#">Deleting Snapshots</a>
Download a snapshot	Save a snapshot to a local file system.	<a href="#">Downloading Snapshots</a>
Upload a snapshot	Upload content from a snapshot that is stored on a local file system.	<a href="#">Uploading Snapshots</a>
Migrate snapshot data	Migrate content to another environment.	<a href="#">Migrating Snapshot Data</a>

## About Snapshots

A snapshot captures the state of your environment at a point in time.

We recommend that you take a snapshot of your environment before people start using the system and again at suitable intervals so you can restore the environment if something goes wrong.

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Artifacts Saved In a Snapshot	Description
Application roles	A snapshot of the application roles defined for your system.

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You can download and store snapshots on a local file system and upload them back to your system if they are required to restore content. This feature is also useful if you want to move data from a development or test environment to a production environment. Always upload snapshots to the same service that created the snapshot.

You can keep up to 10 snapshots online and download as many as you want.

## Taking Snapshots and Restoring Information

You can take a snapshot of your system at any time.

### Topics:

- [Taking a Snapshot](#)
- [Restoring from a Snapshot](#)
- [Editing Snapshot Descriptions](#)
- [Deleting Snapshots](#)

### Taking a Snapshot

Administrators can take a snapshot of your system at any time.

To take a snapshot:

1. Click **New Snapshot**.
2. Enter a short description for the snapshot to help you remember later why you took it.

For example, why you created the snapshot and what it contains.

3. Click **OK**.

The latest content is saved to a snapshot.

### Restoring from a Snapshot

If something goes wrong, it's easy to restore your content to a previous working state from a snapshot.

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#### Note:

Restoring from a snapshot overwrites the existing content. Anyone who is signed-in, has their session terminated.

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To restore from a snapshot:

1. Select the snapshot that you want to use to restore your system.
2. Click **Manage Snapshot**.  

3. Click **Restore** to return your system to the state when this snapshot was taken.
4. In the Restore Snapshot dialog box, select only those elements you want to restore.
5. Click **Restore**.  

A warning message displays because restoring a snapshot can be very disruptive.
6. Click **Yes** to restore the selected snapshot, or click **No** to abandon the restore.

## Editing Snapshot Descriptions

You can add or update the description for any snapshot.

To edit a snapshot description:

1. Select the snapshot you want to edit.
2. Click **Manage Snapshot**.



3. Click **Edit**.
4. Update the description, and click **OK**.

## Deleting Snapshots

From time to time, delete snapshots that you do not need.

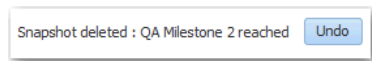
To delete a snapshot:

1. Select the snapshot that you want to delete.
2. Click **Manage Snapshot**.



3. Click **Delete** to delete the snapshot.

A message displays at the top right hand side of the page. If you change your mind, click **Undo**.



## Downloading, Uploading, and Migrating Snapshots

Download and upload features enable you to save snapshots to your local file system and upload them back to the cloud. Use these features to back up and restore your

content or to migrate content between development, test, and production environments.

**Topics:**

- [Downloading Snapshots](#)
- [Uploading Snapshots](#)
- [Migrating Snapshot Data](#)

## Downloading Snapshots

Use the Download option to save a snapshot to your local file system. This allows you to locally store and manage snapshots you take of your system.

If you haven't taken the snapshot yet, you'll need to do that first. See [Taking a Snapshot](#).

To download a snapshot:

1. Select the snapshot that you want to download.
2. Click **Manage Snapshot**.



3. Click **Download**.
4. Enter and confirm a password for the snapshot. The password must contain at least 8 characters.

Do not forget this password. You'll be asked for this password if you try to upload the file in the future. For example, you may want to restore or migrate the content stored in the snapshot.

5. Click **OK**.

What happens next depends on your browser. In Internet Explorer, for example, you browse the Save As dialog, and click **Save** to save the snapshot in the selected location.

The snapshot downloads as an Oracle Business Intelligence archive file (.bar).

## Uploading Snapshots

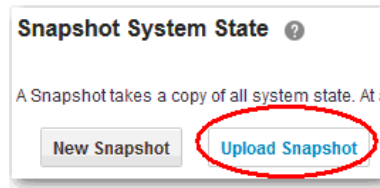
You can upload a snapshot that you previously saved on your local file system.

When you upload a snapshot, the file itself is uploaded to your system but the artifacts stored inside the snapshot are not immediately available in your environment. Any snapshot you upload displays in the snapshot list. When you are ready to do so, you can overwrite your current artifacts, such as the catalog, with information from the snapshot. See [Restoring from a Snapshot](#).

To upload a snapshot:

1. Click **Upload Snapshot**.





2. Use **Browse** to locate the snapshot that you want to upload.

Choose the Oracle Business Intelligence archive file (.bar) that contains your snapshot.

3. Enter the snapshot password.

You set the password during the download process.

4. Click **OK**.

The uploaded snapshot is displayed in the list of saved snapshots. Follow steps in [Restoring from a Snapshot](#) to restore it.

## Migrating Snapshot Data

You can migrate content users have created in one environment to another environment, using snapshots. For example, you may want to move pre-production content to a production environment.

To migrate snapshot data from one Oracle Transactional Business Intelligence Enterprise to another:

1. Download the snapshot that you want to migrate to your local file system.

See [Downloading Snapshots](#).

2. Sign in to the target system and upload the snapshot.

See [Uploading Snapshots](#).

3. Select the newly uploaded snapshot in the list of saved snapshots.

Follow the steps in [Restoring from a Snapshot](#) to migrate content saved inside this snapshot to the target system.



# Working with an OTBI Enterprise Service

You can use My Services to monitor and view historical metrics for OTBI Enterprise.

## Topics

- [Viewing OTBI Enterprise Service Status and Metrics](#)
- [Frequently Asked Questions](#)

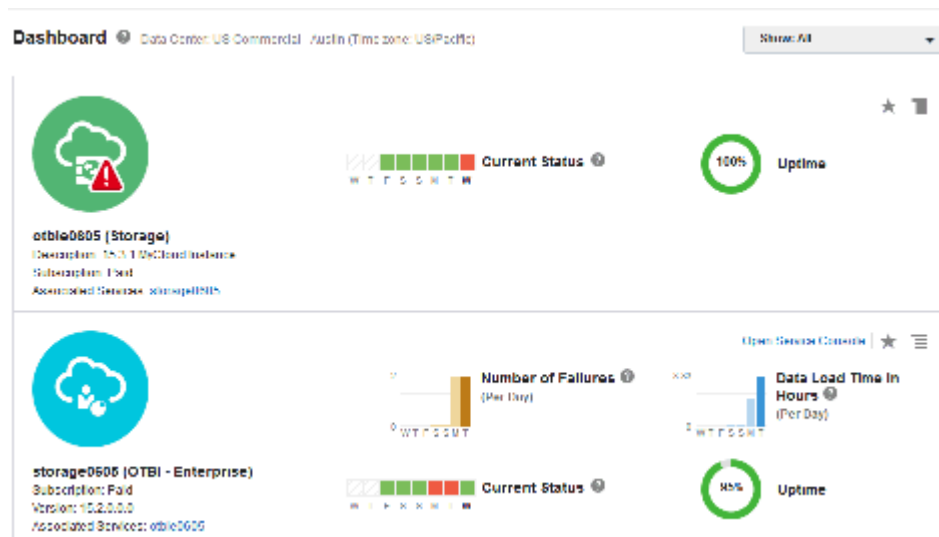
## Viewing OTBI Enterprise Service Status and Metrics

Administrators monitor OTBI Enterprise service status and view usage metrics in My Services.

To view your service status and service metrics:

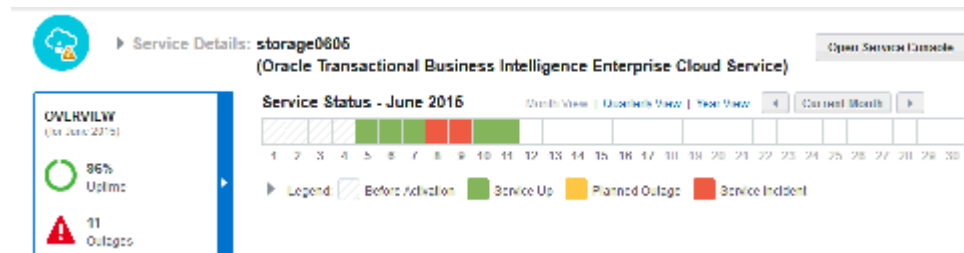
1. Log in to My Services.

In the My Services Dashboard, the current status for the OTBI Enterprise and associated Storage service are displayed. Important metrics for current status for the last week, number of failures per day, data load time per day, and percentage uptime are also directly available in the dashboard. Red exclamation icons indicate service outages and graphs provide direct access to information about current and historical service status, uptime, and Data Load Times for the OTBI Enterprise service.



2. Click the **OTBI-Enterprise** link to open the service details.

In the Service Details, you can easily view uptime and number of outages, and view historical service status metrics in a chart by month, quarter, and year. To select a view, click its link above the chart. To change the timeframe in the service status, click the link for Month, Quarter, or Year View.



3. Click **Metrics** to view tabular reports on data load failures and usage metrics, including Unique BI Users and the percentage of allocated database tablespace used by the OTBI Enterprise database.

**Latest Usage** (as of 5 days 13 hours 5 minutes ago)

Data Load Metrics	
Total Number of Failures (last 28 days)	2
Usage Metrics	
Unique BI Users (last 28 days)	12
DB Tablespace Used (%)	60

## Frequently Asked Questions

Frequently asked questions about the administration of OTBI Enterprise.

Question	Answer
How long is data held in Oracle Storage Service as part of the Customer Data Retention Policy?	90 days