

# **JD Edwards EnterpriseOne Tools**

One View Administration Guide

Release 9.2

**E53532-06**

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Describes various administration and configuration tasks for One View Reports, One View Financial Statements, and One View Watchlists.

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# Preface

Welcome to the *JD Edwards EnterpriseOne Tools One View Administration Guide*.

## Audience

This guide is intended for system administrators and technical consultants who are responsible for installing and configuring One View Reports and users who are responsible for One View Watchlist administration.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

### Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Related Information

For additional information about JD Edwards EnterpriseOne applications, features, content, and training, visit the JD Edwards EnterpriseOne pages on the JD Edwards Resource Library located at:

<http://learnjde.com>

This guide contains references to server configuration settings that JD Edwards EnterpriseOne stores in configuration files (such as `jde.ini`, `jas.ini`, `jdbj.ini`, `jdelog.properties`, and so on). Beginning with the JD Edwards EnterpriseOne Tools Release 8.97, we highly recommend that you only access and manage these settings for the supported server types using the Server Manager program.

## Conventions

This document uses the following text conventions:

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Convention	Explanation
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action or terms defined in text or the glossary.

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<b>Convention</b>	<b>Explanation</b>
<i>italics</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 examples, text that appears on a screen, or text that you enter.
> <b>Tutorial</b>	Indicates a link to a recording of the described feature. These recordings are in MP4 format so ensure that you have an appropriate player installed. Access to these recordings requires a valid Oracle account.

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# Part I

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## One View Reporting Administration

JD Edwards EnterpriseOne One View Reporting enables you to easily run existing reports or create new reports that contain tables, graphs, and charts, and to view them in a variety of formats, such as PDF documents, HTML, and Excel spreadsheets. Additionally, many reports enable you to interactively filter the report data for further analysis.

This part contains the following chapters:

- 7 [Chapter 1, "Understanding One View Reporting"](#)
- 7 [Chapter 2, "Installing and Configuring One View Reporting for Oracle 11g"](#)
- 7 [Chapter 3, "Installing and Configuring One View Reporting for Oracle 12c"](#)
- 7 [Chapter 4, "Administrative Tasks"](#)



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# Understanding One View Reporting

This chapter contains the following topics:

- ? [Section 1.1, "Oracle BI Publisher and JD Edwards EnterpriseOne"](#)
- ? [Section 1.2, "One View Reporting Overview"](#)
- ? [Section 1.3, "Understanding One View Reports"](#)

## 1.1 Oracle BI Publisher and JD Edwards EnterpriseOne

JD Edwards EnterpriseOne has three integrations with Oracle Business Intelligence (BI) Publisher. Each integration addresses a specific reporting requirement: producing customer facing documents, enabling end users to create their own operational reports, and providing power users and IT staff with the ability to create complex ad hoc reports. This section provides a summary of each integration and common use cases for each.

- ? **Embedded BI Publisher for JD Edwards EnterpriseOne:** Transforms the output from a UBE into customer facing documents (Pixel Perfect). Common use cases for Embedded BI Publisher with JD Edwards EnterpriseOne are invoices, statements, pick slips, and checks.

See the *JD Edwards EnterpriseOne Tools BI Publisher for JD Edwards EnterpriseOne Guide* for more information.

- ? **One View Reporting:** Enables end users to create and run their personalized reports directly from JD Edwards EnterpriseOne interactive applications. These reports are typically specific to the user or role and are those that users will run on a daily, weekly, or other periodic basis as part of their normal activities. Users require a high degree of personalization regarding data selection, sequencing, data columns included, and data visualization (charts, tables, graphs) with this type of report. These end user reports improve user productivity by providing users with better visibility into operational data as part of their standard day-to-day business process. One View Reporting enables users to select data fields and perform specific data selection from within JD Edwards EnterpriseOne applications and leverage the layout capabilities within BI Publisher to define the report output formatting. Common use cases might be sales reports, customer reports, supplier reports, and employee reports. This guide describes the installation, configuration, and administrative tasks for the One View Reporting integration and use cases.
- ? **Ad Hoc Reporting:** Allows power users and IT staff to build powerful queries to interrogate data on an ad hoc basis. This type of report is typically created to meet a specific business requirement outside of the normal business process, and it is only run once or twice. These reports typically require users to create a SQL statement to retrieve the data (query builder). The query is usually created by the IT department or a power user who understands the JD Edwards EnterpriseOne data schema. After building the query, IT or a power user will create a report layout with tables and charts to display the data

(template builder). This integration leverages the JD Edwards EnterpriseOne JDBC Driver and Oracle BI Publisher Enterprise Edition. This integration has commonly been called "interactive reporting." By definition, there are no common use cases.

## 1.2 One View Reporting Overview

Oracle's JD Edwards EnterpriseOne One View Reporting provides an intuitive, easy-to-use method for you to access data and produce reports with Oracle BI Publisher.

You can easily run existing reports or create new reports that contain tables, graphs, and charts and view them in a variety of formats, such as PDF documents, HTML, and Excel spreadsheets. Additionally, many reports enable you to interactively filter the report data for further analysis.

One View Reporting allows the use of standard and customized Find/Browse forms to locate report data. It also provides One View applications, which use joined business views to access records from multiple tables. The One View Find/Browse forms combine business transactional and master data in combinations not previously available, and you can view these data combinations in the BI Publisher layout you choose. You can also use Data Browser to locate report data and produce One View reports.

The benefits of One View Reporting include:

- ⌘ Reducing the cost of developing and maintaining reports by eliminating IT support for most reporting needs.
- ⌘ Improving total cost of ownership by eliminating the need for third-party reporting products.
- ⌘ Improving end user satisfaction by providing easy, real-time access to information.
- ⌘ Enabling business decision making by providing low cost access to information.
- ⌘ Reducing the cost of system upgrades by reducing or eliminating custom applications that were required for viewing data or producing reports.

## 1.3 Understanding One View Reports

A One View Report consists of:

- ⌘ A Business Intelligence (BI) Publisher data model, which is a <report name>.xdmz file on the BI Publisher server.
- ⌘ A BI Publisher report, which is a <report name>.xdoz file on the BI Publisher server.
- ⌘ The report definition for the One View Report, which is the metadata for the report and resides in JD Edwards EnterpriseOne.

One View Reports are created by end users when they select Add Reports from the One View menu on JD Edwards EnterpriseOne query forms. These One View Reports are stored on the Oracle BI Publisher server. The metadata of the One View Reports is also stored in JD Edwards EnterpriseOne tables.

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# Installing and Configuring One View Reporting for Oracle 11g

This chapter contains the following topics:

- ? [Section 2.1, "Installing Oracle BI Publisher"](#)
- ? [Section 2.2, "Installing JD Edwards EnterpriseOne Boilerplates for BI Publisher"](#)
- ? [Section 2.3, "Giving the BIAuthor Role Access to the Boilerplates"](#)
- ? [Section 2.4, "Configuring BI Publisher Users"](#)
- ? [Section 2.5, "Understanding and Managing One View Reports"](#)
- ? [Section 2.6, "Verifying the One View Reporting BI Publisher Soft Coding Template"](#)
- ? [Section 2.7, "Creating a One View Reporting BI Publisher Soft Coding Record"](#)
- ? [Section 2.8, "Mapping a JD Edwards EnterpriseOne User to a BI Publisher User"](#)
- ? [Section 2.9, "Installing One View Reports"](#)
- ? [Section 2.10, "Working with Configuration Settings"](#)
- ? [Section 2.11, "HTML Server Clustering Considerations"](#)

## 2.1 Installing Oracle BI Publisher

This section provides an overview of installing Oracle Business Intelligence (BI) Publisher, lists prerequisites, and discusses how to install Oracle BI Publisher 11g. The new One View Reporting solution integrates JD Edwards EnterpriseOne interactive applications with BI Publisher interactive layout editor to create an easy to use end user reporting solution.

### 2.1.1 Oracle BI Publisher Installation Overview

Oracle BI Publisher is a reporting solution that enables you to author, manage, and deliver all your reports and documents easier and faster than traditional reporting tools.

For One View Reporting, you only need to install Oracle BI Publisher. You do not need to install Oracle Business Intelligence Enterprise Edition or Oracle Real-Time Decisions.

BI Publisher installs WebLogic, you do not need to install it beforehand. The default domain in WebLogic functions for BI Publisher, so you do not need to create an additional domain unless you prefer to keep the domains separate.

### 2.1.2 Prerequisites

Before you complete the tasks in this section, you must:

- 2 Review the Certifications for JD Edwards EnterpriseOne One View Reporting. See document 745831.1 (JD Edwards EnterpriseOne Minimum Technical Requirements Reference) on My Oracle Support:  
<https://support.oracle.com/epmos/faces/DocumentDisplay?id=745831.1>
- 2 Install and configure a supported database.  
For the latest information about supported databases, visit the Oracle Fusion Middleware Certification document at:  
<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html>  
Look for product area "Oracle Fusion Middleware 11g Release 1 Certifications" and then access "System Requirements and Supported Platforms for one of the following:
  - Oracle Business Intelligence Suite Enterprise Edition 11gR1 (11.1.1.3.0-11.1.1.6.0) (xls).
  - Oracle Business Intelligence Suite Enterprise Edition 11gR1 (11.1.1.9.0) (xls).
- 2 After you have installed a database, ensure that it is configured correctly by referring to the "Repository Creation Utility (RCU) Requirements" section in the *System Requirements and Specification document for Oracle Fusion Middleware 11g Release 1 (11.1.1.x)*:  
[http://docs.oracle.com/html/E18558\\_01/fusion\\_requirements.htm#CHDJGECA](http://docs.oracle.com/html/E18558_01/fusion_requirements.htm#CHDJGECA)  
You can also access the document at:  
<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-requirements-100147.html>
- 2 Download Oracle BI Publisher from the Oracle Software Delivery Cloud:  
<https://edelivery.oracle.com>  
Select Oracle Business Intelligence for the Product Pack field and choose the appropriate platform.
- 2 Download the Oracle Repository Utility (RCU) from Oracle Technology Network (OTN), Oracle Business Intelligence (11.1.1.x) Downloads page:  
<http://www.oracle.com/technetwork/middleware/bi-enterprise-edition/downloads/bi-downloads-1923016.html>  
The RCU version must match the BI Publisher version.
- 2 Configure your browser to allow pop-ups.
- 2 Ensure that Adobe Flash Viewer is installed.

### 2.1.3 Installing Oracle BI Publisher

If you do not plan to change any of the default settings, such as ports and security logins, then follow the *Quick Installation Guide for Oracle Business Intelligence* to perform the installation. If you do plan to change some of the default settings, then follow the *Installation Guide for Oracle Business Intelligence*. Please note that although the Oracle BI installation package includes the following products, with all the technology required to install, configure, and run them, you only need to install Oracle Business Intelligence Publisher:

- 2 Oracle Business Intelligence Publisher
- 2 Oracle Business Intelligence Enterprise Edition (Oracle BI Answers, Oracle BI Interactive Dashboards, Oracle BI Delivers, Oracle BI Administration Tool, Oracle BI Add-in for Microsoft Office, and Oracle BI Publisher) (optional)

- ⌘ Oracle Real-Time Decisions (optional)
- ⌘ Essbase Suite (optional)

Oracle BI Publisher 11g (11.1.1.7) is packaged with WebLogic Server 10.3.5.0 and Oracle JDK 1.6.0\_35.

Oracle BI Publisher 11g (11.1.1.9) is packaged with WebLogic Server 10.3.6.0 and Oracle JDK 1.7.0\_80. Support for Oracle BI Publisher version 11.1.1.9 begins with JD Edwards EnterpriseOne Tools Release 9.2.

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**IMPORTANT!:** For One View Reporting, you only need to install Oracle BI Publisher.

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The following steps provide brief guidance for the installation. Review these steps first and then please use the installation guide, *Quick Installation Guide for Oracle Business Intelligence*, or if you plan to change some of the default settings, *Installation Guide for Oracle Business Intelligence*, for more detailed steps.

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**Note:** A new installation of BI Publisher is recommended even if you are currently on a prior release. This allows you to do some parallel testing before switching to the latest release.

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To install Oracle BI Publisher:

1. Launch the Oracle Repository Utility (RCU) and create the BI Publisher Schemas. (BIPLATFORM and MDS).

For more information, see the *Quick Installation Guide for Oracle Business Intelligence* guide.

2. Launch the Oracle Business Intelligence Installer after the schemas are created.

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**Caution:**

- ⌘ Do not install the software using a user ID that contains a special character.
  - ⌘ BI Publisher and the HTML server must be within the same firewall in order to have two-way web service and http communication.
  - ⌘ If you have anti-virus software running on your installing machine, the installation process may take longer.
- 
- 

3. Select the appropriate installation type:

- ⌘ "Simple Install" installs Oracle Business Intelligence components with the default settings on a single computer in the minimum number of steps. The Managed Server is not installed. This installation is targeted for demonstration, evaluation and proof of concept use cases.
- ⌘ "Enterprise Install" installs Oracle Business Intelligence components that you select and associates them with the Middleware, Oracle data source, and WebLogic Server homes that you specify. The enterprise installation type creates a separate Managed Server, bi\_server1, along with the Admin Server. You should also use this installation type if you have a previous version of BI Publisher installed.

This installation type is recommended for a production environment.

- 7. "Software Only Install" installs software binary files in an existing Middleware home for later configuration.
- 4. When the Oracle Business Intelligence Component Installation screen appears, select only the Business Intelligence Publisher option.

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**Note:** For detailed instructions on how to install Oracle BI Publisher, see the *Quick Installation Guide for Oracle Business Intelligence*.

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- 5. When the installation and configuration finish, sign onto the WebLogic Admin Console and BI Server to make sure the servers are up and running by using the following URLs:  
http://host:port/console (WebLogic Admin Console)  
http://host:9704/xmlpserver (BI Publisher login page, port 9704 is the default port for "Enterprise Install" type)
- 6. Review the Certifications for any updates or additional requirements.

To configure an SSL connection between the EnterpriseOne HTML Server and Oracle BI Publisher server, see "Configuring an SSL Connection Between the EnterpriseOne HTML Server and Oracle BI Publisher Server for One View Reporting" in the *JD Edwards EnterpriseOne Tools Security Administration Guide*.

## 2.1.4 Migrating Users to a New Version of Oracle BI Publisher

If you are upgrading your version of Oracle BI Publisher from a previous version, after the installation, you must migrate the WebLogic users from an existing version to the new server.

To migrate users to a new version of Oracle BI Publisher:

1. Export the user information from the existing BI Server.
  - a. Log on to the BI Publisher WebLogic Admin Console.
  - b. Select Security Realm.
  - c. Select Export from the Migration tab.
  - d. Enter the location for the exported files.
  - e. Click Save.
2. Import the user information to the new server.
  - a. Log on to the BI Publisher WebLogic Admin Console.
  - b. Select Security Realm.
  - c. Select Import from the Migration tab.
  - d. Enter the location of the exported files.
  - e. Click Save.
3. Download and import the JD Edwards EnterpriseOne Reports for BI Publisher.



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**Note:** Existing reports from the previous version of BI Publisher will not run successfully; you must manually convert them to the new version.

For personal reports, this is done when you select an existing report and use the Save, Save As, Copy, Promote, or Sync options on the Report Definition tab.

For shared reports, this is done when you select an existing report and use the Copy, Reserve, and Sync options on the Report Definition tab.

For more information, see the "Enabling the Decimal Formatting Feature" section of the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*.

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4. Upload the JD Edwards EnterpriseOne Boilerplates templates.

## 2.2 Installing JD Edwards EnterpriseOne Boilerplates for BI Publisher

Template files are used to create JD Edwards EnterpriseOne report layouts. After BI Publisher is fully installed, you may want to install the boilerplate templates created by JD Edwards. These templates are not mandatory to run One View Reports, but you are welcome to use them to achieve a look and feel that is consistent with the delivered One View Reports.

To install JD Edwards EnterpriseOne boilerplate templates for BI Publisher:

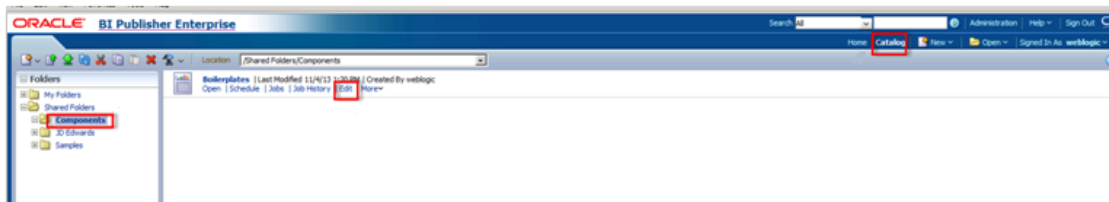
1. Download the One View Boilerplates component from the Update Center on My Oracle Support.  
<https://updatecenter.oracle.com/>
2. Extract the .xpt files from JDE\_Boilerplates.zip file using an unzip program and save them to your hard drive.
3. Log into BI Publisher with administrator privileges and navigate to the Catalog.
4. In the Folders pane, open Shared Folders directory and then the Components folder.

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**Note:** If you have installed both OBIEE and BI Publisher on the same server, you might not see the Components folder and boilerplates functionality. To correct this, see [Missing Boilerplates in Components Folder in BI Publisher](#).

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5. Locate the Boilerplates report and select Edit.



6. Select Add New Layout from the upper right corner of the screen.
7. Select Upload and then when prompted, select the EnterpriseOne boilerplate template file (.xpt file) that you stored on your hard drive.

8. Provide a name for the template, select "BI Publisher Template" as the type, and select "English" for locale.
9. Select Upload to save the template.
10. Repeat these steps to add the remaining EnterpriseOne template files.

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**Note:** Any BI Publisher templates (.xpt files) added to the Boilerplates report are displayed to all users as shared templates.

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## 2.3 Giving the BIAuthor Role Access to the Boilerplates

After the Boilerplates are uploaded, you need to make sure that all users with the BIAuthor role have access to the boilerplates. Depending on your specific setup, you might also assign other roles to your users. Only the BIAuthor role is required.

To give the BIAuthor role access to the boilerplates:

1. Log into BI Publisher with administrator privileges and navigate to the Catalog.
2. In the Shared Folders directory, open the Components folder.
3. Select the More drop-down menu and then Permissions.
4. Select the "+" symbol (Create) and then the Search button.
5. Add the BIAuthor role and click OK.
6. Check all the check boxes for the BIAuthor role and click OK.

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**Note:** You, as the System Administrator, should determine whether or not to grant users the permission to delete boilerplates.

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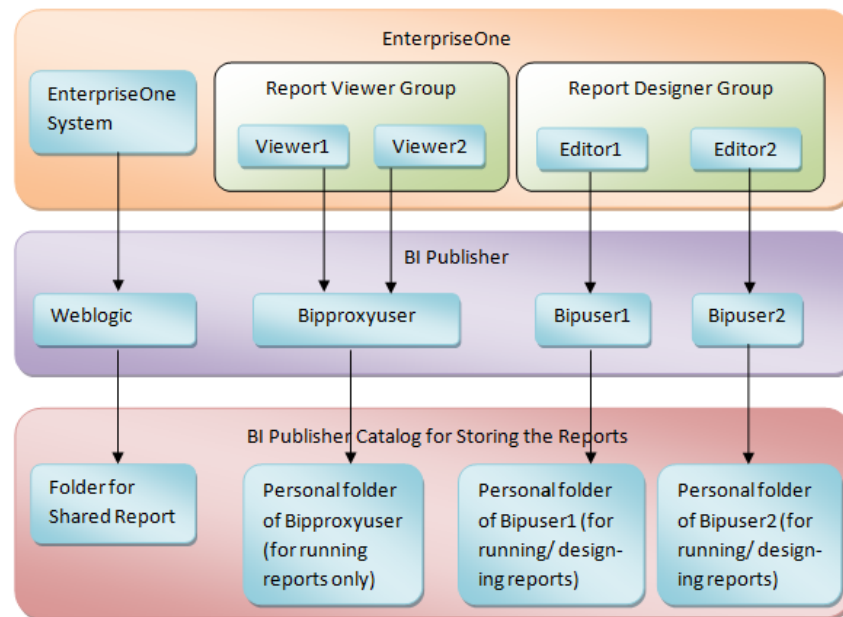
---

## 2.4 Configuring BI Publisher Users

When configuring BI Publisher users, you need to create a BI Publisher user for each JD Edwards EnterpriseOne user that designs or authors One View Reports. You may set up one proxy user in BI Publisher for all of the JD Edwards EnterpriseOne users who will only be running reports and not authoring them. This will minimize the amount of setup required. However, if you prefer to track each user individually for auditing purposes, you can create a one-to-one relationship by setting up a BI Publisher user for each JD Edwards EnterpriseOne user.

The following graphic shows the two types of users and how they are configured in BI Publisher.

**Figure 2–1 User Setup in JD Edwards EnterpriseOne and BI Publisher**



To configure a BI Publisher user:

1. Log into the WebLogic Server Administration Console.
2. Navigate to "Security Realms" and then "myrealm."
3. Select the "Users and Groups" tab and then click "New."
4. Create a new BIP account by providing a name, description, and password, and click OK.

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**Note:** Do not use BIP account names or passwords that contain special characters.

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5. In order to add the newly created user to the BI Author group:
  - a. Find and select your newly created user.
  - b. Navigate to the "Groups" tab.
  - c. Select the BIAuthor group and move it under Chosen.
  - d. Click Save.

---

**Note:** All BI Publisher users must belong to the BIAuthor group.

---

6. Click Save.
7. Verify that you can log on to the Oracle BI Publisher server using your new user information.

See *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher* for more information.

> **Tutorial:** [Click here to view a recording of this feature.](#)

You will need to set up mappings for each JD Edwards EnterpriseOne user to the corresponding BI Publisher user. This information appears later in this chapter in [Mapping a JD Edwards EnterpriseOne User to a BI Publisher User](#).

---

**Note:** After all BI Publisher users are created in the WebLogic Server Administration Console, you must either log each user onto the Oracle BI Publisher server as suggested in the last step or restart the BI Publisher server. One of these must be done before those users can connect from JD Edwards EnterpriseOne.

---

## 2.5 Understanding and Managing One View Reports

One View Reports are managed as light-weighted objects.

Each One View Report is composed of these components:

- A data model file.
- A report template file. (This file has the same name as the data model file.)

Both of these files are stored on the BI Publisher server.

On the BI Publisher server, these reports are organized by path codes. For example, a personal report created in the One View Job Inquiry application (P51220) in DV920 path code (regardless of environment) is stored in the following BI Publisher folder: \BIP\_user\_id\DV920\P51200\.

A shared report for the PY900 path code for the same application is stored here: \Shared Folder\PY920\P51200\.

You can move reports using the Approve/Share functionality within P98220U and P98220W.

In the soft coding application, please be aware that soft coding records are done at the environment level, not the path code level. You need to set up soft coding records for all environments for a particular path code.

## 2.6 Verifying the One View Reporting BI Publisher Soft Coding Template

Access the Web Services Soft Coding Template application (P953000) by selecting the following from the Navigator drop-down menu: EnterpriseOne Menus, EnterpriseOne Life Cycle Tools, System Administration Tools, Soft Coding Administration, Soft Coding Template. Use P953000 to verify that the One View Reporting BI Publisher soft coding template exists with these values:

Field	Value
Template Name	JDE_ONEVIEW_CONNECTION
Description	One View Reporting Connection Template
Soft Coding Key	ONEVIEW_BIP_CONN

**Important:** The value for SoftCoding Key must be ONEVIEW\_BIP\_CONN. You cannot use any other value for this field.

Field	Value
Value	<pre> &lt;webservice&gt; &lt;endpoint&gt;http://bip_server:bip_port&lt;/endpoint&gt; &lt;username&gt;bip_user_name&lt;/username&gt; &lt;password&gt;_  _BIP_PASSWORD_  _&lt;/password&gt; &lt;properties&gt; &lt;property&gt;&lt;name&gt;root catalog&lt;/name&gt;&lt;value&gt;JD Edwards&lt;/value&gt;&lt;/property&gt; &lt;property&gt;&lt;name&gt;bip version&lt;/name&gt;&lt;value&gt;11.1.1.7.0&lt;/value&gt;&lt;/property&gt; &lt;property&gt;&lt;name&gt;bip url&lt;/name&gt;&lt;value&gt;http://bip_server:bip_ port&lt;/value&gt;&lt;/property&gt; &lt;property&gt;&lt;name&gt;path code upgraded from&lt;/name&gt;&lt;value&gt;DV910&lt;/value&gt; &lt;/properties&gt; &lt;/webservice&gt; </pre> <p>To complete this field, please see the Soft Coding Value Guidelines below.</p>

---

**Note:** The bip url property must be added if you want to run One View reports from an external domain as well as an internal domain. You do not need to add this property if you are only planning to run One View reports from an internal domain (local intranet).

---

## 2.6.1 Soft Coding Value Guidelines

When updating the One View Reporting BI Publisher connection template, use the following guidelines to ensure valid soft coding value parameters:

### 2.6.1.1 Http Address

The http address must follow this format with a valid, fully qualified Oracle BI Application Server name or an IP address and port number:

```
http://<server>:<port>
```

### 2.6.1.2 Username

The user name must be a valid BI Publisher user name with administration privileges.

### 2.6.1.3 \_||\_BI\_PASSWORD\_||\_

An administrator has two ways to supply the password for the Oracle BI user:

- ? Use a placeholder parameter (masked parameter) in the soft coding value and assign the value to the parameter in the grid. The previous example used a place holder parameter called "BI\_PASSWORD" and defined the BI\_PASSWORD variable in the grid. The "\_||\_" prefix and postfix are markers for placeholder variables.

When used this way, the value will be encrypted before it is saved into the database and is masked for future display.

- ? Use plain text directly in the soft coding value.

#### 2.6.1.4 Root Catalog

The root catalog value must be "JD Edwards." Do not use any other value for this parameter.

#### 2.6.1.5 Bip Url

You need to add this property only if you want to run One View reports from both internal and external domains.

Verify that the BI Publisher URL used for this parameter can be opened via a web browser from both external and internal domains. This is necessary so that the One View report window, which is launched when running the report, can connect to the BI Publisher server. If the URL is set up properly, you should see the BI Publisher sign-in page when running from both an external and internal domain.

## 2.7 Creating a One View Reporting BI Publisher Soft Coding Record

This section provides an overview of soft coding records and discusses how to create a soft coding record.

### 2.7.1 Overview

You must set up a BI Publisher soft coding record in order to establish a connection from the HTML server to the BI Publisher server. You set up soft coding records by environment and by user (or role, or \*PUBLIC). When a soft coding record is set up for \*PUBLIC and a particular environment, everyone logged into the environment will use the same soft coding record to locate and connect to the BI Publisher server. Use the Soft Coding Records (P954000) application to set up soft coding records.

The number of soft coding records that you set up depends on how you want to set up your users. You may set up soft coding records differently. It is recommended that you divide your users into two groups:

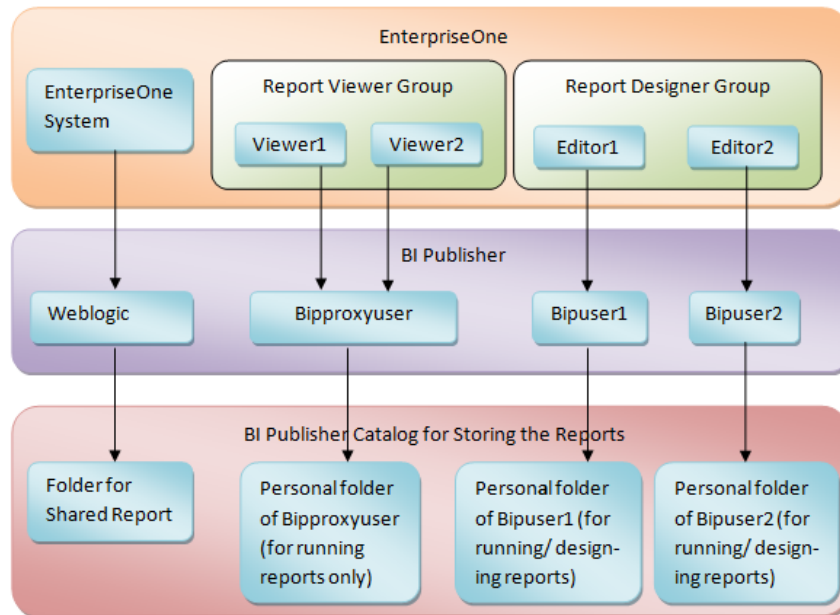
#### Viewer Group

This group consists of the JD Edwards EnterpriseOne users who are only interested in viewing reports instead of designing reports. For this group of users, only set up one proxy BI Publisher user and let them share the proxy user setting in the soft coding record as their common personal credential. Do not set up JD Edwards EnterpriseOne to BI Publisher user mappings for these users in their user profiles. When setting up permissions, assign permission to run One View Reports to their JD Edwards EnterpriseOne accounts or their common JD Edwards EnterpriseOne role.

#### Designer Group

This group consists of the JD Edwards EnterpriseOne users who design new and existing reports. For this group of users, set up their individual BI Publisher accounts on the BI Publisher Server and individual JD Edwards EnterpriseOne to BI Publisher user mappings in their JD Edwards EnterpriseOne user profiles. The individual JD Edwards EnterpriseOne to BI Publisher user mapping setting in the user profile has a higher priority than the proxy user setting in the soft coding record. Assign permission to design and share One View Reports to these users.

**Figure 2–2 Viewer Group and Designer Group Example**



The system checks both the user profile and soft coding record for the personal credentials based on the following rules:

1. If the soft coding record does not contain the optional proxy user and proxy password setting, and the JD Edwards EnterpriseOne to BI Publisher user mapping is not set up in the user profile, then One View Reporting is disabled for the user.
2. If the soft coding record does not contain the optional proxy user and proxy password setting, and the JD Edwards EnterpriseOne to BI Publisher user mapping is set up in the user profile, then the user uses the personal BI Publisher account to access BI Publisher.
3. If the soft coding record contains the optional proxy user and proxy password setting, and the JD Edwards EnterpriseOne to BI Publisher user mapping is not set up in the user profile, then the user uses the proxy user to access BI Publisher.
4. If the soft coding record contains the optional proxy user and proxy password setting, and the JD Edwards EnterpriseOne to BI Publisher user mapping is set up in the user profile, then the user uses the personal BI Publisher account to access BI Publisher.

---

**Important:** Be sure to set up soft coding records for all of the users or roles that you intend to use.

---

## 2.7.2 Creating a Soft Coding Record

To create a One View Reporting BI Publisher soft coding record:

1. Access the P954000 application by selecting the following from the Navigator drop-down menu: EnterpriseOne Menus, EnterpriseOne Life Cycle Tools, System Administration Tools, Soft Coding Administration, Soft Coding Records.
2. Select Add.
3. Enter the following information:

Field	Value
User/Role	Enter the JD Edwards EnterpriseOne user, role, or *PUBLIC. Use *PUBLIC to set up one record for all users.  <b>Note:</b> This must be an administrative user ID. Make sure you set up soft coding records for all of the users and roles that you intend to use.
Environment Name	Enter the JD Edwards EnterpriseOne environment for which you are creating this soft coding record.
Template Name	JDE_ONEVIEW_CONNECTION
SoftCoding Key	ONEVIEW_BIP_CONN

---

**Important:** The value for SoftCoding Key must be ONEVIEW\_BIP\_CONN. You cannot use any other value for this field.

---

- Click the Populate Soft Coding Value button to populate the Soft Coding Description and Soft Coding Value fields with the information from the JDE\_ONEVIEW\_CONNECTION template.
- Enter the Mask value for any Mask fields (for example, enter a value for the BI\_PASSWORD).
- Enter values for the proxy user and proxy password if you plan to use a proxy user. These values are optional. The two new properties need to be added as the sibling tag after property for root catalog.

---

**Note:** The name of the property must be "proxy user" and "proxy password". For example:

```
<property><name>proxy user</name><value>_||_PROXY_USER_||_</value></property>
```

```
<property><name>proxy password</name><value>_||_PROXY_PASSWORD_||_</value></property>
```

Enter the values of \_||\_PROXY\_USER\_||\_ and \_||\_PROXY\_PASSWORD\_||\_ in the grid.

---

- Leave the **root catalog** property value as JD Edwards:

```
<property><name>root catalog</name><value>JD Edwards</value></property>
```

Do not use any other value for this property.

- Enter a value for the **bip version** property:

```
<property><name>bip version</name><value>11.1.1.9.0</value></property>
```

- Enter a value for the **bip url** property if you want to run One View reports from both internal and external domains:

```
<property><name>bip url</name><value>http://bip server:bip port</value></property>
```

- Modify the server and port to reflect your specific installation.

- If you are upgrading from a previous release, enter a value for the **path code upgraded from** property:



```
<property><name>path code upgraded from</name><value>DV910</value></property>
```

The path code should reflect your specific installation.

12. Click OK to save the record.

---

**Note:** You must add a soft coding record for each path code.

---

## 2.7.3 Soft Coding Value Guidelines

When updating the One View Reporting BI Publisher connection template, use the following guidelines to ensure valid soft coding value parameters:

### 2.7.3.1 Http Address

The http address must follow this format with a valid, fully qualified Oracle BI Application Server name or an IP address and port number:

```
http://<server>:<port>
```

### 2.7.3.2 Username

The user name must be a valid BI Publisher user name with administration privileges.

### 2.7.3.3 `_||_BI_PASSWORD_||_`

The administrator has two ways to supply the password for the Oracle BI user:

- ? Use a placeholder parameter (masked parameter) in the soft coding value and assign the value to the parameter in the grid. The previous example used a place holder parameter called "BI\_PASSWORD" and defined the BI\_PASSWORD variable in the grid. The "\_||\_" prefix and postfix are markers for placeholder variables.

When used this way, the value will be encrypted before it is saved into the database and is masked for future display.

- ? Use plain text directly in the soft coding value.

### 2.7.3.4 Root Catalog

The root catalog value must be "JD Edwards." Do not use any other value for this parameter.

### 2.7.3.5 Bip Url

Verify that the BI Publisher URL used for this parameter can be opened via a web browser from both internal and external domains.

The http address must follow this format with a valid, fully-qualified Oracle BI Application Server name or an IP address and port number:

```
http://<server>:<port>
```

> **Tutorial:** [Click here to view a recording of this feature.](#)

## 2.8 Mapping a JD Edwards EnterpriseOne User to a BI Publisher User

You need to map each JD Edwards EnterpriseOne user to a BI Publisher user for all of the JD Edwards EnterpriseOne users who need to create and edit reports. For JD Edwards EnterpriseOne users who only run public reports, you can use the soft coding parameter <proxy

user> and <proxy password> to connect to BI Publisher, and you do not need to map those JD Edwards EnterpriseOne users.

---

---

**Note:** If you are using a proxy user, then the password is not required in the JD Edwards EnterpriseOne user profile.

---

---

This section discusses how to enter the BI Publisher user ID and password in the user's profile in JD Edwards EnterpriseOne so that the system can use the BI Publisher user ID and password to connect to BI Publisher servers on behalf of the EnterpriseOne user.

To map a JD Edwards EnterpriseOne user to a BI Publisher user:

1. Select My System Options from the JD Edwards EnterpriseOne Personalization menu.
2. Select User Profile Revisions.
3. From the Form exits, select BI Publisher Pswd.
4. Enter the information from your BI Publisher account in the BI Publisher User ID and BI Publisher Password fields.
5. Log out of and back into JD Edwards EnterpriseOne so that the settings will take effect.
6. Whenever you change your user ID and password on the BI Publisher server, you will need to change it here as well.

> **Tutorial:** [Click here to view a recording of this feature.](#)

---

---

**Note:** After all BI Publisher users are created in BI Publisher, you must restart the BI Publisher server before those users can connect from JD Edwards EnterpriseOne.

---

---

## 2.9 Installing One View Reports

With 9.1 and 9.0 Application Releases, the existing One View reports are converted to the new format. With 9.2 Application Release, One View reports are included in the installation with the Central Objects path code. In order to use the One View reports, you must Approve/Share them.

### Verify that One View Reports Can Be Shared

Prior to performing the Approve/Share for the delivered JD Edwards EnterpriseOne One View reports, make sure that a new One View report can be shared by performing these steps:

1. Log into the HTML server as a JD Edwards EnterpriseOne user with a mapped BI Publisher user.

---

---

**Note:** Verify that the user has the proper permissions to access One View Reporting as described in the *JD Edwards EnterpriseOne Tools Security Administration Guide*

---

---

2. Launch an application and try to add a new report.

If the BI Publisher connection is set up properly, you will see the BI Publisher Layout Editor appear after saving the new report.

3. Verify that the report can run and display the layout, then select Request to Publish to begin the process of sharing a report.
4. Use the User Defined Object (UDO) Administration application (P98220U) to filter on Pending Promote and to Approve/Share the new One View report, in order to verify the correct configuration.
5. Once the report is shared, sign out and back into JD Edwards EnterpriseOne in order to reset the security cache.

After signing back in, you should see the new One View report in the Shared section of the One View menu.

### Share Delivered One View Reports

Once the new shared One View report is running, the delivered One View reports at Pending Promote can be shared.

To share the delivered One View reports:

1. Open P98220U and filter on Pending Promote for One View reports.
2. Approve/Share the reports.
3. Sign out and sign back in to JD Edwards EnterpriseOne for the reports to appear in the applications.

### Import Patches or Updates for One View Reports

Patches or Updates for One View reports are delivered on the Update Center.

To import One View report updates:

1. Download the UDO zip files, that are applicable to your JD Edwards EnterpriseOne version and BI Publisher version, from the Update Center:  
<https://updatecenter.oracle.com>
2. Navigate to Web OMW (P98220W).
3. Select Import from the Form menu.
4. Find and select the One View reports zip file that you downloaded.
5. Click Load.
6. When the zip file is imported, it appears as a project with status 11, New Pending Project Review. At this point the imported One View reports are at a status of 07, Pending Promote.
7. You must use the Approve/Share option from P98220U or P98220W in order to make the reports available to users.

The Approve/Share action extracts the data and artifacts from the zip repository and loads the runtime tables and target locations.

In addition, the project can be advanced with Transfer Activity Rules to transfer the UDO to other path codes. An Approve/Share must be performed by signing into the transfer environment.

For more information on importing, exporting, and transferring UDOs, such as One View reports, see *JD Edwards EnterpriseOne Tools Object Management Workbench for the Web Guide*.

For more information on approving UDOs, such as One View reports, see *JD Edwards EnterpriseOne Tools User Defined Object Approval Application Guide*.

## 2.10 Working with Configuration Settings

To maximize the end user experience, you can use these Web Runtime configuration settings. You can access and change these in Server Manager under Web Runtime, Web Objects Settings. The settings are:

### One View Reporting: Default Record Count

When a One View Report runs, three options control how many records the report will run. The three options that you see in the user interface of the One View report or Layout Tab are:

- ⌵ Retrieve Record Count: X
- ⌵ Use current data in grid
- ⌵ Retrieve all records

When you select the first option, Retrieve Record Count, the system uses this Server Manager setting to set the default record count for the report.

### One View Reporting: Maximum Record Count

This is the maximum number of records the system will retrieve for any One View Report.

### One View Reporting: Connection Wait Time

This is the default time in milliseconds to wait for a connection to the BI Publisher server before launching the first One View Report. You may want to increase this value for a slow network and decrease it for a faster network.

The Server Manager interface for runtime and metric parameters provides details on the usage of each setting applicable to that parameter. Access this by clicking the "i" (Information) icon for a desired parameter.

## 2.11 HTML Server Clustering Considerations

In order for One View Reporting to function with an HTML Server cluster, for example, Oracle HTTP Server (OHS), you must:

1. Open the Soft Coding Configuration application (P954000).
2. Select the "ONEVIEW\_BIP\_CONN" soft coding record, and add these properties:

```
<property><name>cluster member node ids</name><value>Mbr_1,Mbr_2</value></property>
```

```
<property><name>cluster member urls</name><value>http://myserver:8080,http://myserver:8082</value></property>
```

The cluster member node IDs are the Managed Servers within the cluster. The cluster member URLs are the actual JD Edwards EnterpriseOne HTML URLs for the cluster members. You can retrieve this information from the Server Manager Console. Also, the order of the cluster node IDs must match the order of the cluster member URLs.

If you have more cluster members, just add them to these parameters separated by a comma.

3. Click OK to save the record.
4. Logout and log back into JD Edwards EnterpriseOne using the load balancer URL.

---

---

# Installing and Configuring One View Reporting for Oracle 12c

This chapter contains the following topics:

- ? [Installing Oracle BI Publisher](#)
- ? [Configuring BI Publisher Users for One View Reporting](#)
- ? [Installing JD Edwards EnterpriseOne Boilerplates for BI Publisher](#)
- ? [Giving the BIAuthor Role Access to the Boilerplates](#)
- ? [Understanding and Managing One View Reports](#)
- ? [Verifying the One View Reporting BI Publisher Soft Coding Template](#)
- ? [Creating a One View Reporting BI Publisher Soft Coding Record](#)
- ? [Mapping a JD Edwards EnterpriseOne User to a BI Publisher User](#)
- ? [Installing One View Reports](#)
- ? [Working with Configuration Settings](#)
- ? [HTML Server Clustering Considerations](#)

## 3.1 Installing Oracle BI Publisher

This section provides an overview of installing Oracle Business Intelligence (BI) Publisher, lists prerequisites, and discusses how to install Oracle BI Publisher 12c. The new One View Reporting solution integrates JD Edwards EnterpriseOne interactive applications with the BI Publisher interactive layout editor to create an easy-to-use end user reporting solution.

### 3.1.1 Oracle BI Publisher Installation Overview

Oracle BI Publisher is a reporting solution that enables you to author, manage, and deliver all your reports and documents easier and faster than traditional reporting tools.

For One View Reporting, you only need to install Oracle BI Publisher. You do not need to install Oracle Business Intelligence Enterprise Edition or Oracle Real-Time Decisions.

You need to install WebLogic before installing BI Publisher 12c. The default domain in WebLogic functions for BI Publisher, so you do not need to create an additional domain unless you prefer to keep the domains separate.

### 3.1.2 Prerequisites

Before you complete the tasks in this section, you must:

- ⌚ Review the Certifications for JD Edwards EnterpriseOne One View Reporting. See document 745831.1 (JD Edwards EnterpriseOne Minimum Technical Requirements Reference) on My Oracle Support:  
<https://support.oracle.com/epmos/faces/DocumentDisplay?id=745831.1>
- ⌚ Install and configure a supported database.  
For the latest information about supported databases, visit the Oracle Fusion Middleware Certification document at:  
<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html>  
Look for product area "Oracle Fusion Middleware 12c Certifications" and then access "System Requirements and Supported Platforms" for one of the following:
  - System Requirements and Supported Platforms for Oracle Fusion Middleware 12c (12.2.1.1.0) (xls)
- ⌚ After you have installed a database, ensure that it is configured correctly by referring to the "Repository Creation Utility (RCU) Requirements" section in the *System Requirements and Specification document for Oracle Fusion Middleware 12c Release 2 (12.2.1.x)*:  
[http://docs.oracle.com/html/E73100\\_01/toc.htm](http://docs.oracle.com/html/E73100_01/toc.htm)  
You can also access the document at:  
<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-requirements-100147.html>
- ⌚ Download Oracle BI Publisher from the Oracle Software Delivery Cloud:  
<https://edelivery.oracle.com>  
Select Oracle Business Intelligence for the Product Pack field and choose the appropriate platform.
- ⌚ Configure your browser to allow pop-up windows.
- ⌚ Ensure that Adobe Flash Viewer is installed.

### 3.1.3 Installing Oracle BI Publisher

Use the information provided in the *Installing and Configuring Oracle Business Intelligence* guide to perform the installation.

Note that although the Oracle BI installation package includes the following products, with all the technology required to install, configure, and run them, you only need to install Oracle Business Intelligence Publisher:

- ⌚ Oracle Business Intelligence Publisher
- ⌚ Oracle Business Intelligence Enterprise Edition (Oracle BI Answers, Oracle BI Interactive Dashboards, Oracle BI Delivers, Oracle BI Administration Tool, Oracle BI Add-in for Microsoft Office, and Oracle BI Publisher) (optional)
- ⌚ Oracle Real-Time Decisions (optional)
- ⌚ Essbase Suite (optional)
- ⌚ WebLogic Server

---

---

**IMPORTANT:** For One View Reporting, you only need to install Oracle BI Publisher.

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The following steps provide guidance for the installation. See also the *Quick Installation Guide for Oracle Business Intelligence*.

---

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**Note:** A new installation of BI Publisher is recommended even if you are currently on a prior release. This enables you to perform some parallel testing before switching to the latest release.

---

---

To install Oracle BI Publisher:

1. Launch the Oracle Business Intelligence Installer to install and create the BI Publisher Schemas (BIPLATFORM and MDS).

For more information, see the *Installing and Configuring Oracle Business Intelligence* guide.

---

---

**Caution:**

- ⌘ Do not install the software using a user ID that contains a special character.
  - ⌘ BI Publisher and the HTML server must be within the same firewall in order to have two-way web service and http communication.
  - ⌘ If you have anti-virus software running on your installing machine, the installation process may take longer.
- 
- 

2. Select the appropriate installation type:

- ⌘ "Simple Install" installs Oracle Business Intelligence components with the default settings on a single computer in the minimum number of steps. The Managed Server is not installed. This installation is targeted for demonstration, evaluation, and proof of concept use cases.
- ⌘ "Enterprise Install" installs Oracle Business Intelligence components that you select and associates them with the Middleware, Oracle data source, and WebLogic Server homes that you specify. The enterprise installation type creates a separate Managed Server, `bi_server1`, along with the Admin Server. You should also use this installation type if you have a previous version of BI Publisher installed.

This installation type is recommended for a production environment.

- ⌘ "Software Only Install" installs software binary files in an existing Middleware home for later configuration.
3. When the Oracle Business Intelligence Component Installation screen appears, select only the Business Intelligence Publisher option.

---

---

**Note:** For detailed instructions on how to install Oracle BI Publisher, see the *Installing and Configuring Oracle Business Intelligence* guide.

---

---

4. When the installation and configuration finish, sign on to the WebLogic Admin Console and BI Server to make sure the servers are up and running by using the following URLs:

`http://host:port/console` (WebLogic Admin Console)

`http://host:9502/xmlpserver` (BI Publisher login page, port 9502 is the default port for "Enterprise Install" type)

5. Review the Certifications for any updates or additional requirements.

To configure an SSL connection between the EnterpriseOne HTML Server and Oracle BI Publisher server, see "Configuring an SSL Connection Between the EnterpriseOne HTML Server and Oracle BI Publisher Server for One View Reporting" in the *JD Edwards EnterpriseOne Tools Security Administration Guide*.

### 3.1.4 Migrating Users to a New Version of Oracle BI Publisher

If you are upgrading your version of Oracle BI Publisher from a previous version, after the installation, you must migrate the WebLogic users from an existing version to the new server.

To migrate users to a new version of Oracle BI Publisher:

1. Export the user information from the existing BI Server.
  - a. Log on to the BI Publisher WebLogic Admin Console.
  - b. Select Security Realm.
  - c. Select Export from the Migration tab.
  - d. Enter the location for the exported files.
  - e. Click Save.
2. Import the user information to the new server.
  - a. Log on to the BI Publisher WebLogic Admin Console.
  - b. Select Security Realm.
  - c. Select Import from the Migration tab.
  - d. Enter the location of the exported files.
  - e. Click Save.
3. Download and import the JD Edwards EnterpriseOne Reports for BI Publisher.

---

---

**Note:** Existing reports from the previous version of BI Publisher will not run successfully; you must manually convert them to the new version.

For personal reports, this is done when you select an existing report and use the Save, Save As, Copy, Promote, or Sync options on the Report Definition tab.

For shared reports, this is done when you select an existing report and use the Copy, Reserve, and Sync options on the Report Definition tab.

For more information, see the "Enabling the Decimal Formatting Feature" section of the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*.

---

---

4. Upload the JD Edwards EnterpriseOne Boilerplates templates.

## 3.2 Configuring BI Publisher Users for One View Reporting

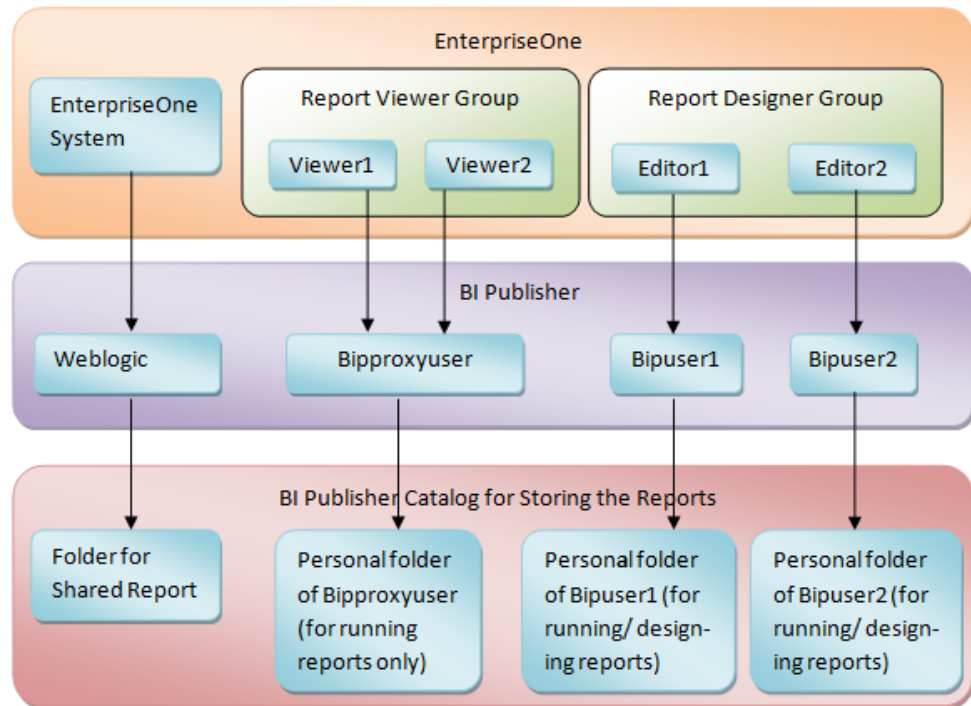
When configuring BI Publisher users, you need to create a BI Publisher user for each JD Edwards EnterpriseOne user that designs or authors One View Reports. You may set up one proxy user in BI Publisher for all of the JD Edwards EnterpriseOne users who will only be running reports and not authoring them. This will minimize the amount of setup required. However, if you prefer to track each user individually for auditing purposes, you can create a



one-to-one relationship by setting up a BI Publisher user for each JD Edwards EnterpriseOne user.

The following graphic shows the two types of users and how they are configured in BI Publisher.

**Figure 3–1 User Setup in JD Edwards EnterpriseOne and BI Publisher**



The next sections walk you through configuring a BI Publisher group (BI Author) and users. For more information including screen shots, you can also see document 2281660.1 on My Oracle Support:

<https://support.oracle.com/epmos/faces/DocumentDisplay?id=2281660.1>

### 3.2.1 Adding a BI Publisher Group

To add a BI Publisher group:

1. Log in to the WebLogic Server Administration Console.
2. Click Structure, and then click Security Realms.
3. Click myrealm, and then click the Users and Groups tab.
4. Click the Groups tab, and then click New.
5. Enter "BI Author" in the Group Name field, enter a description, and complete any other fields.
6. Click OK.

### 3.2.2 Adding a BI Publisher User

To add a BI Publisher user:

1. Log in to the WebLogic Server Administration Console.
2. Click Structure, and then click Security Realms.
3. Click myrealm, and then click the Users and Groups tab.
4. Click the User tab, and then click New.
5. Provide a name, description, and password, and then click OK.

---

---

**Note:** Do not use BI Publisher account names or passwords that contain special characters.

---

---

### 3.2.3 Adding BI Publisher User to a Group

To add a BI Publisher user to a group:

1. Find and select your newly created user.
2. Click the Groups tab.
3. Select the BI Author group and use the arrow button to move it under the Chosen section.

---

---

**Note:** All BI Publisher users must belong to the BI Author group.

---

---

4. Click Save.
5. Verify that you can log on to the Oracle BI Publisher server using your new user information.

See the *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher* for more information.

> **Tutorial:** [Click here to view a recording of this feature.](#)

You will need to set up mappings for each JD Edwards EnterpriseOne user to the corresponding BI Publisher user. This information is available in [Mapping a JD Edwards EnterpriseOne User to a BI Publisher User](#).

### 3.2.4 Attaching a Group to an Application Role

To attach a group to an Application Role:

1. Log in to the Enterprise Manager as an administrator.
2. Click WebLogic Domain, Security, and then click Application Roles.
3. Select the application role you want to assign to the group.
4. Click Edit.
5. Click Add.
6. Select an option from the Type list, and then click Search.
7. Select the group you want to attach to the application role, and then click OK.

### 3.2.5 Granting BI Catalog Permissions to the Group

To grant permission to the group:

1. Log in to your BI Publisher server as an administrator.

---

---

**Note:** If you installed the OBIEE component with BI Publisher, you must log in to your BI Publisher Analytics as an administrator.

---

---

2. Click Catalog.
3. Click Shared Folders, and then click Permissions.
4. Click Add.
5. Select the role.
6. Select appropriate check boxes to assign permission to the role.
7. Click OK.

### 3.2.6 Verifying the Permissions Granted to the Group

To verify the permissions granted to the group:

1. Log in to your BIP Server using the credentials of the newly created user.
2. Click Catalog.
3. Click Components, and then click More.

Note that the delete option is not available for the user.

4. Log out of the BIP Server.
5. Log in to the BIP Server as an administrator.
6. Click Catalog.
7. Click Components, More, and then click Permissions.

Select the Delete check box to assign that permission to the newly created user's underlying application role (for example, BI Content Author).

8. Click OK.
9. Logout from the system.
10. Log in to your BIP server using the credentials of the newly created user.
11. Click Catalog.
12. Click Components, and then click More.

Note that the delete option is now available for the user.

---

---

**Note:** After all BI Publisher users are created in the WebLogic Server Administration Console, you must either log each user onto the Oracle BI Publisher server as suggested in the above procedure or restart the BI Publisher server. One of these must actions must be completed before those users can connect from JD Edwards EnterpriseOne.

---

---

## 3.3 Installing JD Edwards EnterpriseOne Boilerplates for BI Publisher

Template files are used to create JD Edwards EnterpriseOne report layouts. After BI Publisher is fully installed, you may want to install the boilerplate templates created by JD Edwards.

These templates are not mandatory to run One View Reports, but you can use them to achieve a look and feel that is consistent with the delivered One View Reports.

To install JD Edwards EnterpriseOne boilerplate templates for BI Publisher:

1. Download the One View Boilerplates component from the Update Center on My Oracle Support.

<https://updatecenter.oracle.com/>

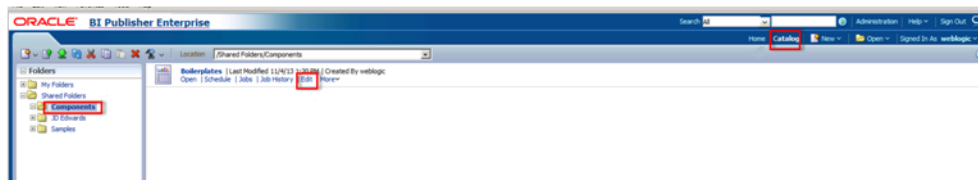
2. Extract the .xpt files from the JDE\_Boilerplates.zip file using an unzip program and save them to your hard drive.
3. Log in to BI Publisher with administrator privileges and navigate to the Catalog.
4. In the Folders pane, open the Shared Folders directory and then the Components folder.

---

**Note:** If you have installed both OBIEE and BI Publisher on the same server, you might not see the Components folder and boilerplates functionality. To correct this, see [Missing Boilerplates in Components Folder in BI Publisher](#).

---

5. Locate the Boilerplates report and select Edit.



6. Select Add New Layout from the upper right corner of the screen.
7. Select Upload and then when prompted, select the EnterpriseOne boilerplate template file (.xpt file) that you stored on your hard drive.
8. Provide a name for the template, select "BI Publisher Template" as the type, and select "English" for locale.
9. Select Upload to save the template.
10. Repeat these steps to add the remaining EnterpriseOne template files.

---

**Note:** Any BI Publisher templates (.xpt files) added to the Boilerplates report are displayed to all users as shared templates.

---

### 3.4 Giving the BIAuthor Role Access to the Boilerplates

After the Boilerplates are uploaded, you need to ensure that all users with the BIAuthor role have access to the boilerplates. Depending on your specific setup, you might also assign other roles to your users. Only the BIAuthor role is required.

To give the BIAuthor role access to the boilerplates:

1. Log in to BI Publisher with administrator privileges and navigate to the Catalog.
2. In the Shared Folders directory, open the Components folder.
3. Select the More drop-down menu and then Permissions.
4. Select the "+" symbol (Create) and then the Search button.

5. Add the BIAuthor role and click OK.
6. Check all the check boxes for the BIAuthor role and click OK.

---

**Note:** You, as the System Administrator, should determine whether or not to grant users the permission to delete boilerplates.

---

## 3.5 Understanding and Managing One View Reports

One View Reports are managed as light-weighted objects.

Each One View Report is composed of these components:

- A data model file
- A report template file (This file has the same name as the data model file.)

Both of these files are stored on the BI Publisher server.

On the BI Publisher server, these reports are organized by path codes. For example, a personal report created in the One View Job Inquiry application (P51220) in DV920 path code (regardless of environment) is stored in the following BI Publisher folder: \BIP\_user\_id\DV920\P51200\.

A shared report for the PY900 path code for the same application is stored here: \Shared Folder\PY920\P51200\.

You can move reports using the Approve/Share functionality within P98220U and P98220W.

In the soft coding application, be aware that soft coding records are done at the environment level, not the path code level. You need to set up soft coding records for all environments for a particular path code.

## 3.6 Verifying the One View Reporting BI Publisher Soft Coding Template

Access the Web Services Soft Coding Template application (P953000) by selecting the following from the Navigator drop-down menu: EnterpriseOne Menus, EnterpriseOne Life Cycle Tools, System Administration Tools, Soft Coding Administration, Soft Coding Template. Use P953000 to verify that the One View Reporting BI Publisher soft coding template exists with these values:

Field	Value
Template Name	JDE_ONEVIEW_CONNECTION
Description	One View Reporting Connection Template
Soft Coding Key	ONEVIEW_BIP_CONN

**Important:** The value for SoftCoding Key must be ONEVIEW\_BIP\_CONN. You cannot use any other value for this field.

Field	Value
Value	<pre> &lt;webservice&gt; &lt;endpoint&gt;http://bip_server:bip_port&lt;/endpoint&gt; &lt;username&gt;bip_user_name&lt;/username&gt; &lt;password&gt;_  _BIP_PASSWORD_  _&lt;/password&gt; &lt;properties&gt; &lt;property&gt;&lt;name&gt;root catalog&lt;/name&gt;&lt;value&gt;JD Edwards&lt;/value&gt;&lt;/property&gt; &lt;property&gt;&lt;name&gt;bip version&lt;/name&gt;&lt;value&gt;12.2.1.1.0&lt;/value&gt;&lt;/property&gt; &lt;property&gt;&lt;name&gt;bip url&lt;/name&gt;&lt;value&gt;http://bip_server:bip_ port&lt;/value&gt;&lt;/property&gt; &lt;property&gt;&lt;name&gt;path code upgraded from&lt;/name&gt;&lt;value&gt;DV920&lt;/value&gt; &lt;/properties&gt; &lt;/webservice&gt; </pre> <p>To complete this field, see the Soft Coding Value Guidelines below.</p>

---

**Note:** The bip url property must be added if you want to run One View reports from an external domain as well as an internal domain. You do not need to add this property if you are only planning to run One View reports from an internal domain (local intranet).

---

### 3.6.1 Soft Coding Value Guidelines

When updating the One View Reporting BI Publisher connection template, use the following guidelines to ensure valid soft coding value parameters:

#### 3.6.1.1 Http Address

The http address must follow this format with a valid, fully qualified Oracle BI Application Server name or an IP address and port number:

`http://<server>:<port>`

#### 3.6.1.2 Username

The user name must be a valid BI Publisher user name with administration privileges.

#### 3.6.1.3 \_||\_BI\_PASSWORD\_||\_

An administrator has two ways to supply the password for the Oracle BI user:

- ? Use a placeholder parameter (masked parameter) in the soft coding value and assign the value to the parameter in the grid. The previous example used a place holder parameter called "BI\_PASSWORD" and defined the BI\_PASSWORD variable in the grid. The "\_||\_" prefix and postfix are markers for placeholder variables.

When used this way, the value will be encrypted before it is saved into the database and is masked for future display.

- ? Use plain text directly in the soft coding value.

### 3.6.1.4 Root Catalog

The root catalog value must be "JD Edwards." Do not use any other value for this parameter.

### 3.6.1.5 Bip Url

You need to add this property only if you want to run One View reports from both internal and external domains.

Verify that the BI Publisher URL used for this parameter can be opened via a web browser from both external and internal domains. This is necessary so that the One View report window, which is launched when running the report, can connect to the BI Publisher server. If the URL is set up properly, you should see the BI Publisher sign-in page when running from both an external and internal domain.

## 3.7 Creating a One View Reporting BI Publisher Soft Coding Record

This section provides an overview of soft coding records and discusses how to create a soft coding record.

### 3.7.1 Overview

You must set up a BI Publisher soft coding record in order to establish a connection from the HTML server to the BI Publisher server. You set up soft coding records by environment and by user (or role, or \*PUBLIC). When a soft coding record is set up for \*PUBLIC and a particular environment, everyone logged in to the environment will use the same soft coding record to locate and connect to the BI Publisher server. Use the Soft Coding Records (P954000) application to set up soft coding records.

The number of soft coding records that you set up depends on how you want to set up your users. You may set up soft coding records differently. It is recommended that you divide your users into two groups:

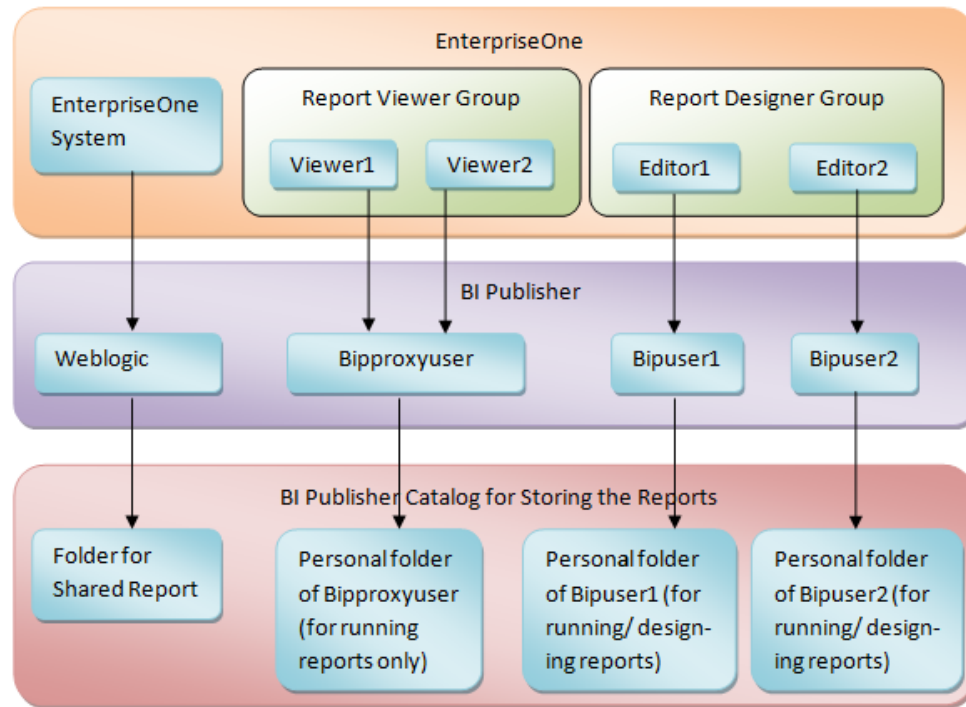
#### Viewer Group

This group consists of the JD Edwards EnterpriseOne users who are only interested in viewing reports instead of designing reports. For this group of users, only set up one proxy BI Publisher user and let them share the proxy user setting in the soft coding record as their common personal credential. Do not set up JD Edwards EnterpriseOne to BI Publisher user mappings for these users in their user profiles. When setting up permissions, assign permission to run One View Reports to their JD Edwards EnterpriseOne accounts or their common JD Edwards EnterpriseOne role.

#### Designer Group

This group consists of the JD Edwards EnterpriseOne users who design new and existing reports. For this group of users, set up their individual BI Publisher accounts on the BI Publisher Server and individual JD Edwards EnterpriseOne to BI Publisher user mappings in their JD Edwards EnterpriseOne user profiles. The individual JD Edwards EnterpriseOne to BI Publisher user mapping setting in the user profile has a higher priority than the proxy user setting in the soft coding record. Assign permission to design and share One View Reports to these users.

**Figure 3–2 Viewer Group and Designer Group Example**



The system checks both the user profile and soft coding record for the personal credentials based on the following rules:

1. If the soft coding record does not contain the optional proxy user and proxy password setting, and the JD Edwards EnterpriseOne to BI Publisher user mapping is not set up in the user profile, then One View Reporting is disabled for the user.
2. If the soft coding record does not contain the optional proxy user and proxy password setting, and the JD Edwards EnterpriseOne to BI Publisher user mapping is set up in the user profile, then the user uses the personal BI Publisher account to access BI Publisher.
3. If the soft coding record contains the optional proxy user and proxy password setting, and the JD Edwards EnterpriseOne to BI Publisher user mapping is not set up in the user profile, then the user uses the proxy user to access BI Publisher.
4. If the soft coding record contains the optional proxy user and proxy password setting, and the JD Edwards EnterpriseOne to BI Publisher user mapping is set up in the user profile, then the user uses the personal BI Publisher account to access BI Publisher.

---

**Important:** Be sure to set up soft coding records for all of the users or roles that you intend to use.

---

### 3.7.2 Creating a Soft Coding Record

To create a One View Reporting BI Publisher soft coding record:

1. Access the P954000 application by selecting the following from the Navigator drop-down menu: EnterpriseOne Menus, EnterpriseOne Life Cycle Tools, System Administration Tools, Soft Coding Administration, Soft Coding Records.
2. Select Add.



3. Enter the following information:

Field	Value
User/Role	Enter the JD Edwards EnterpriseOne user, role, or *PUBLIC. Use *PUBLIC to set up one record for all users.  <b>Note:</b> This must be an administrative user ID. Make sure you set up soft coding records for all of the users and roles that you intend to use.
Environment Name	Enter the JD Edwards EnterpriseOne environment for which you are creating this soft coding record.
Template Name	JDE_ONEVIEW_CONNECTION
SoftCoding Key	ONEVIEW_BIP_CONN

---



---

**Important:** The value for SoftCoding Key must be ONEVIEW\_BIP\_CONN. You cannot use any other value for this field.

---



---

- Click the Populate Soft Coding Value button to populate the Soft Coding Description and Soft Coding Value fields with the information from the JDE\_ONEVIEW\_CONNECTION template.
- Enter the Mask value for any Mask fields (for example, enter a value for the BI\_PASSWORD).
- Enter values for the proxy user and proxy password if you plan to use a proxy user. These values are optional. The two new properties need to be added as the sibling tag after property for root catalog.

---



---

**Note:** The name of the property must be "proxy user" and "proxy password". For example:

```
<property><name>proxy user</name><value>_||_PROXY_USER_||_</value></property>
```

```
<property><name>proxy password</name><value>_||_PROXY_PASSWORD_||_</value></property>
```

Enter the values of \_||\_PROXY\_USER\_||\_ and \_||\_PROXY\_PASSWORD\_||\_ in the grid.

---



---

- Leave the **root catalog** property value as JD Edwards:

```
<property><name>root catalog</name><value>JD Edwards</value></property>
```

Do not use any other value for this property.

- Enter a value for the **bip version** property:

```
<property><name>bip version</name><value>12.2.1.1.0</value></property>
```

- Enter a value for the **bip url** property if you want to run One View reports from both internal and external domains:

```
<property><name>bip url</name><value>http://bip server:bip port</value></property>
```

- Modify the server and port to reflect your specific installation.

11. If you are upgrading from a previous release, enter a value for the **path code upgraded from** property:

```
<property><name>path code upgraded from</name><value>DV920</value></property>
```

The path code should reflect your specific installation.

12. Click OK to save the record.

---

---

**Note:** You must add a soft coding record for each path code.

---

---

### 3.7.3 Soft Coding Value Guidelines

When updating the One View Reporting BI Publisher connection template, use the following guidelines to ensure valid soft coding value parameters:

#### 3.7.3.1 Http Address

The http address must follow this format with a valid, fully qualified Oracle BI Application Server name or an IP address and port number:

```
http://<server>:<port>
```

#### 3.7.3.2 Username

The user name must be a valid BI Publisher user name with administration privileges.

#### 3.7.3.3 `_||_BI_PASSWORD_||_`

The administrator has two ways to supply the password for the Oracle BI user:

- ? Use a placeholder parameter (masked parameter) in the soft coding value and assign the value to the parameter in the grid. The previous example used a placeholder parameter called "BI\_PASSWORD" and defined the BI\_PASSWORD variable in the grid. The "\_||\_" prefix and postfix are markers for placeholder variables.

When used this way, the value will be encrypted before it is saved into the database and is masked for future display.

- ? Use plain text directly in the soft coding value.

#### 3.7.3.4 Root Catalog

The root catalog value must be "JD Edwards." Do not use any other value for this parameter.

#### 3.7.3.5 Bip Url

Verify that the BI Publisher URL used for this parameter can be opened via a web browser from both internal and external domains.

The http address must follow this format with a valid, fully-qualified Oracle BI Application Server name or an IP address and port number:

```
http://<server>:<port>
```

> **Tutorial:** [Click here to view a recording of this feature.](#)

## 3.8 Mapping a JD Edwards EnterpriseOne User to a BI Publisher User

You need to map each JD Edwards EnterpriseOne user to a BI Publisher user for all of the JD Edwards EnterpriseOne users who need to create and edit reports. For JD Edwards EnterpriseOne users who only run public reports, you can use the soft coding parameter <proxy user> and <proxy password> to connect to BI Publisher, and you do not need to map those JD Edwards EnterpriseOne users.

---

**Note:** If you are using a proxy user, then the password is not required in the JD Edwards EnterpriseOne user profile.

---

This section discusses how to enter the BI Publisher user ID and password in the user's profile in JD Edwards EnterpriseOne so that the system can use the BI Publisher user ID and password to connect to BI Publisher servers on behalf of the EnterpriseOne user.

To map a JD Edwards EnterpriseOne user to a BI Publisher user:

1. Select My System Options from the JD Edwards EnterpriseOne Personalization menu.
2. Select User Profile Revisions.
3. From the Form exits, select BI Publisher Pswd.
4. Enter the information from your BI Publisher account in the BI Publisher User ID and BI Publisher Password fields.
5. Log out of JD Edwards EnterpriseOne and log back in so that the settings will take effect.
6. Whenever you change your user ID and password on the BI Publisher server, you will need to change it here as well.

> **Tutorial:** [Click here to view a recording of this feature.](#)

---

**Note:** After all BI Publisher users are created in BI Publisher, you must restart the BI Publisher server before those users can connect from JD Edwards EnterpriseOne.

---

## 3.9 Installing One View Reports

With 9.1 and 9.0 Application Releases, the existing One View reports are converted to the new format. With 9.2 Application Release, One View reports are included in the installation with the Central Objects path code. In order to use the One View reports, you must Approve/Share them.

### Verifying that One View Reports Can be Shared

Before performing an Approve/Share for the delivered JD Edwards EnterpriseOne One View reports, make sure that a new One View report can be shared by performing these steps:

1. Log in to the HTML server as a JD Edwards EnterpriseOne user with a mapped BI Publisher user.

---

**Note:** Verify that the user has the proper permissions to access One View Reporting as described in the *JD Edwards EnterpriseOne Tools Security Administration Guide*.

---

2. Launch an application and try to add a new report.  
If the BI Publisher connection is set up properly, you will see the BI Publisher Layout Editor appear after saving the new report.
3. Verify that the report can run and display the layout, then select Request to Publish to begin the process of sharing a report.
4. Use the User Defined Object (UDO) Administration application (P98220U) to filter on Pending Promote and to Approve/Share the new One View report, in order to verify the correct configuration.
5. When the report is shared, sign out of JD Edwards EnterpriseOne and sign back in to reset the security cache.  
After signing back in, you should see the new One View report in the Shared section of the One View menu.

### Sharing Delivered One View Reports

When the new shared One View report is running, the delivered One View reports at Pending Promote can be shared.

To share the delivered One View reports:

1. Open P98220U and filter on Pending Promote for One View reports.
2. Approve/Share the reports.
3. Sign out of JD Edwards EnterpriseOne and sign back in for the reports to appear in the applications.

### Importing Patches or Updates for One View Reports

Patches or Updates for One View reports are delivered on the Update Center.

To import One View report updates:

1. Download the UDO zip files that are applicable to your JD Edwards EnterpriseOne version and BI Publisher version from the Update Center:  
<https://updatecenter.oracle.com>
2. Navigate to Web OMW (P98220W).
3. Select Import from the Form menu.
4. Find and select the One View reports zip file that you downloaded.
5. Click Load.

When the zip file is imported, it appears as a project with status 11, New Pending Project Review. At this point, the imported One View reports are at a status of 07, Pending Promote.

6. You must use the Approve/Share option from P98220U or P98220W in order to make the reports available to users.

The Approve/Share action extracts the data and artifacts from the zip repository and loads the runtime tables and target locations.

In addition, the project can be advanced with Transfer Activity Rules to transfer the UDO to other path codes. An Approve/Share must be performed by signing in to the transfer environment.

For more information on transferring UDOs, such as One View reports, see the *JD Edwards EnterpriseOne Tools Object Management Workbench for the Web Guide*.

For more information on approving UDOs, such as One View reports, see the *JD Edwards EnterpriseOne Tools User Defined Object Approval Application Guide*.

## 3.10 Working with Configuration Settings

To maximize the end user experience, you can use these Web Runtime configuration settings. You can access and change these in Server Manager under Web Runtime, Web Objects Settings. The settings are:

### One View Reporting: Default Record Count

When a One View Report runs, three options control how many records the report will run. The three options that you see in the user interface of the One View report or Layout Tab are:

- ⌘ Retrieve Record Count: X
- ⌘ Use current data in grid
- ⌘ Retrieve all records

When you select the first option, Retrieve Record Count, the system uses this Server Manager setting to set the default record count for the report.

### One View Reporting: Maximum Record Count

This is the maximum number of records the system will retrieve for any One View Report.

### One View Reporting: Connection Wait Time

This is the default time in milliseconds to wait for a connection to the BI Publisher server before launching the first One View Report. You may want to increase this value for a slow network and decrease it for a faster network.

The Server Manager interface for runtime and metric parameters provides details on the usage of each setting applicable to that parameter. Access this by clicking the "i" (Information) icon for a desired parameter.

## 3.11 HTML Server Clustering Considerations

In order for One View Reporting to function with an HTML Server cluster, for example, Oracle HTTP Server (OHS), you must:

1. Open the Soft Coding Configuration application (P954000).
2. Select the "ONEVIEW\_BIP\_CONN" soft coding record, and add these properties:

```
<property><name>cluster member node ids</name><value>Mbr_1,Mbr_2</value></property>
```

```
<property><name>cluster member urls</name><value>http://myserver:8080,http://myserver:8082</value></property>
```

The cluster member node IDs are the Managed Servers within the cluster. The cluster member URLs are the actual JD Edwards EnterpriseOne HTML URLs for the cluster members. You can retrieve this information from the Server Manager Console. Also, the order of the cluster node IDs must match the order of the cluster member URLs.

If you have more cluster members, add them to these parameters separated by a comma.

3. Click OK to save the record.
4. Log out of JD Edwards EnterpriseOne and log back in using the load balancer URL.



---

---

## Administrative Tasks

This chapter contains the following topics:

- ? [Section 4.1, "One View Report and Log File Locations"](#)
- ? [Section 4.2, "Language Support"](#)
- ? [Section 4.3, "Troubleshooting"](#)
- ? [Section 4.4, "Performance Considerations"](#)
- ? [Section 4.5, "Scalability Considerations"](#)

### 4.1 One View Report and Log File Locations

One View reports Oracle BI Publisher 11g are stored in the following locations:

- ? `<MW_Home>\user_projects\domains\bifoundation_domain\config\bipublisher\repository\Reports\JD Edwards`
- ? `<MW_Home>\user_projects\domains\bifoundation_domain\config\bipublisher\repository\Users\<user or proxy name>\JD Edwards`

One View reports Oracle BI Publisher 12c are stored in the following locations:

- ? `<MW_Home>\user_projects\domains\bifoundation_domain\bidata\components\bipublisher\repository\Reports\JD Edwards`
- ? `<MW_Home>\user_projects\domains\bifoundation_domain\bidata\components\bipublisher\repository\Users\~weblogic\JD Edwards`

BI Publisher log files are stored in the following locations:

- ? `<MW_Home>\user_projects\domains\bifoundation_domain\servers\AdminServer\logs`
- ? `<MW_Home>\user_projects\domains\bifoundation_domain\servers\AdminServer\logs\bipublisher`

The HTML server instance contains the actual One View Reporting and Web Services logs.

### 4.2 Language Support

Currently, the following languages are supported in One View Reporting:

- ? Arabic
- ? Chinese Simplified
- ? Chinese Traditional
- ? Czech

- ? Danish
- ? Dutch
- ? Finnish
- ? French - France
- ? German
- ? Greek
- ? Hungarian
- ? Italian
- ? Japanese
- ? Korean
- ? Polish
- ? Portuguese - Brazil
- ? Spanish
- ? Swedish
- ? Turkish
- ? Russian

JD Edwards EnterpriseOne users using the above languages need to set the JD Edwards EnterpriseOne user profile to indicate the appropriate language. At runtime, the system passes the user's language preference to BI Publisher to run the report in the user's language.

The user should also set the UI language for BI Layout Editor to the language of his choice. To set the language in BI Publisher Layout Editor, click on the User Name, then click "My Account". There are two settings related to language in the BI Publisher Layout Editor:

#### **Report Locale**

This is the language with which you run BI Publisher reports. You can leave this field blank and JD Edwards EnterpriseOne will pass the proper report locale using the JD Edwards EnterpriseOne user's language setting.

#### **UI Language**

This is the language of the menus and descriptions within the BI Publisher Layout Editor. You can change this to the appropriate language of your choice.

All of the delivered JD Edwards EnterpriseOne One View reports contain translations of the previously mentioned languages.

## **4.3 Troubleshooting**

This section discusses some issues you might encounter and possible resolutions.

### **4.3.1 One View Menu Does Not Appear In Applications**

If you cannot see the One View menu in the P01012 or other applications, make sure that:

- ? Your JD Edwards EnterpriseOne user mapping is set up correctly in P0092. It is case-sensitive.
- ? You can log into the BI Publisher server using the user ID and password.
- ? Your BI Publisher account has the BIAuthor role.



- ? The softcoding record is set up for the correct environment and user combination in P954000.
- ? User Defined Object View and Action security is set up for your user in P00950.
- ? You have the proper permissions to use One View Reporting.

### 4.3.2 When Clicking On the One View Menu Icon, Nothing Happens

If nothing happens when you click on the One View menu icon, make sure that you clear your browser file cache.

### 4.3.3 Errors when Saving Reports

If you receive an error when you try to save a report, try the following:

- ? Make sure that your BI Publisher user and password mappings are setup correct in your user profile.
- ? Try restarting the BI Publisher server to fix the issue.
- ? If you see an invalid user and password error message in the HTML server error log, it indicates the user and password in the user profile do not match the BI Publisher server.
- ? Make sure that the JVM settings are configured correctly.

### 4.3.4 Errors in BIP Layout Editor on All Reports

If you receive a red error or "pdf not found" error while trying to render the One View Reports in BIP Layout Editor, make sure that:

- ? Your machine is inside of the company firewall using a cable network. If you are using a wireless network, it may be outside of the company fire wall.
- ? The BI Publisher server and HTML server are within the same firewall. If not, contact your IT Department to make sure that network security allows the BI Publisher server and HTML server to ping each other.
- ? If BI Publisher and the HTML server are in different domains, you are using the full address (IP address of full name with domain) to access the HTML server.

### 4.3.5 Failed to Save Report Error and Problem Running Shared Report

If you receive the error message "Failed to Save the Report" when attempting to save the Data Model for a report that you are creating, or if you are trying to run a shared report and all you see is a Processing popup message for a second and then nothing happens, you may have a problem with the JD Edwards EnterpriseOne connection to the BI Publisher server. After creating the BI Publisher users in BI Publisher, you must restart the BI Publisher server before trying to connect from JD Edwards EnterpriseOne.

### 4.3.6 Missing Boilerplates in Components Folder in BI Publisher

If you installed Oracle Business Intelligence Enterprise Edition (OBIEE) and BI Publisher on the same server, you might not see the Boilerplates functionality in the Components folder under the Shared Folders.

In order to reload the boilerplates feature:

1. Sign onto the BI Publisher server (<http://host:port/xmlpserver>).
2. Select Administration, System Maintenance, Server Configuration as shown:

**Figure 4–1 Server Configuration**



3. On the Catalog form, click the "Upload to BI Presentation Catalog" button.  
A confirmation message appears in the upper right corner of the Administration page.
4. Click Apply to save the configuration.
5. Once the upload is completed, you see the Components enabled in the Shared Folders.

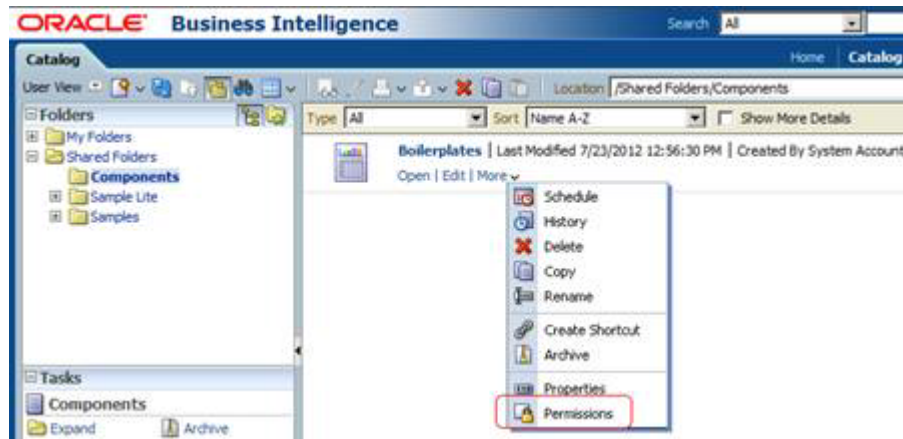
---

**Note:** Since this is an integrated BI Publisher in OBIEE, you cannot edit the permissions from BI Publisher; you need to edit security through OBIEE.

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6. To edit permissions, sign into OBIEE (<http://host:port/analytics>).
7. Select "More" to open the drop-down menu, and then select Permissions.

**Figure 4–2 Permissions**



8. Review and edit the permissions accordingly.

### 4.3.7 Version Mismatch Error During Import of One View Reports

If you receive an error message stating that there is a version mismatch with the One View Reports and Soft Coding Version, then the Soft Coding Record is missing the property for the latest BI Publisher version.

### 4.3.8 Report Has Exceeded Maximum Records Warning

When running a report, if you receive a warning that states that the report has exceeded the maximum number of records, this may be due to the Select Row Set value for the report. The row set options specify which data to be used in a report. When you use the "Retrieve record count" option, the report will display data up to the number of records specified, even if more

than the specified number of records match the query conditions. The default for this field is 500, but this value can be configured differently for your company and can also be overridden when you run a report or add a new report, if you want to limit the number of records retrieved.

When you select the "Use current data in grid" option as your Select Row Set value, the report displays only the data from the grid, so you may receive this warning if there are more records matching the query conditions than the current data in the grid.

Finally, when you use the "Retrieve all records" option, you will receive this warning if the number of records exceeds the system limit.

If the report data is limited due to this setting, you receive the following pop-up warning: "Warning! Report has exceeded the maximum number of records specified. Results shown are incomplete." The report still runs if you click OK on this warning; however, it only returns a subset of the applicable data based on the value specified in the Retrieve record count field.

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**Note:** The report is limited by the number of rows specified in the report data set as explained above, but it is also limited by the system limit. If the system limit is lower than the report data set limit, the system enforces the lower data limit. For example, if a One View report has a data set limit of 10000 rows whereas the system has a limit of 5000 rows, the One View report is limited to 5000 rows.

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See the "Running One View Reports chapter, Layout Tab section" in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide* for more information.

### 4.3.9 System Cannot Access Report Because It Doesn't Exist

When trying to run or access a report, if you receive an error message that the system cannot access the report because it does not exist anymore on the BI Publisher server, it may be due to a missing property in the soft coding record. This property, **path code upgraded from**, needs to be added if you have just upgraded from a previous release of JD Edwards EnterpriseOne.

For more information on adding this property, see [Creating a Soft Coding Record](#).

## 4.4 Performance Considerations

The performance of each report depends on the number of rows each report retrieves, the amount of logic each report processes, and the number of graphical and tabular components on the report.

To improve the performance of a report:

1. Limit the number of rows each report retrieves.
2. Look at the number of event rules for each grid row that are being fetched on the One View Report applications.
3. Look at the graphical and tabular components in the report. Sometimes a pivot table with a large number of columns may take a long time to render. In this case, reduce the number of columns in the pivot table.

In general, it is a good idea to reduce the number of fields selected in the data model. This will speed up the report generation and rendering.

One View Reporting is an interactive solution that is not designed to retrieve tens of thousands of database records. If you need to work with a large amount of data, using either the Read Only JDBC driver or a UBE report will provide better performance.

## 4.5 Scalability Considerations

When you run a One View report, the HTML server retrieves the report data. The data is then passed to the BI Publisher server for report rendering and generation. This means that running a One View report adds more load to the HTML server and the back end database. The additional load is similar to adding more query users in the system.

# Part II

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## One View Financial Statements Administration

The JD Edwards One View Financial Statements feature is an extension of One View Reporting for Financials. It enables a company's financial staff to control how financial statements, such as balance sheets and income statements, are designed and generated.

The One View Financial Statements functionality enables you to use the One View Reporting foundation, such as performing queries over data and designing a financial statement layout using BI Publisher Layout Editor. You set up the elements to use in your financial statements, such as column and row definitions, and then set up a statement definition, version, and layout to use when you generate the financial statements.

This part contains the following chapter:

- [Configuring One View Financial Statements](#)



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## Configuring One View Financial Statements

This chapter includes the following topics:

- 7 [Section 5.1, "Configuring Oracle BI Publisher for One View Financial Statements"](#)

### 5.1 Configuring Oracle BI Publisher for One View Financial Statements

All of the One View Financial Statements Artifacts, such as the data model and reports, are created within the P09340 folder. You must create this folder in Oracle BI Publisher and assign permissions for this folder to the BI Author Role.

To configure Oracle BI Publisher for One View Financial Statements:

1. Log into Oracle BI Publisher with administrator privileges.
2. Create a folder named **P09340** under the /JD Edwards/<path code> folder.
3. Assign Read, Write, Delete, Run Report Online, and View Report Output permissions to this folder for the BI Author Role.
4. Click OK.

This represents the minimal configuration required to use a Non- BI Publisher Administrative proxy user for One View Financial Statements.

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**Note:** With traditional One View Reports, the artifacts for a personal report are contained within the proxy user's own personal folder (for example, /jdeproxy/JD Edwards/STAGINGA/P01012/P01012Report9.xdm). The previous example is a sample path for a report designed in the P01012 application with the proxy user as jdeproxy.

Since the Oracle BI Publisher artifacts for One View Financial Statements are always \*PUBLIC, this additional setup is required.

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# Part III

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## One View Watchlists Administration

One View Watchlists represent collections of items that match user-defined criteria. They enable users to define information to which they would like to be alerted. For example, a user might want to be alerted to outstanding tasks that they need to do or thresholds that have been passed. Watchlists provide an easy way for this information to be conveyed to users.

One View Watchlists enable an administrator to secure which users can view, create, and share Watchlists. If there are existing Watchlists to which you have access, you will see the Watchlists menu on the menu bar within JD Edwards EnterpriseOne.

Watchlists are built from JD Edwards EnterpriseOne queries and are therefore, only supported on forms that support query functionality.

This part contains the following chapter:

- 7 [Administrative Tasks for One View Watchlists](#)

For information on how to set up security for Watchlists, see the *JD Edwards EnterpriseOne Tools Security Administration Guide*



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## Administrative Tasks for One View Watchlists

This chapter contains the following topics:

- [Section 6.1, "Troubleshooting"](#)
- [Section 6.2, "Performance Considerations"](#)

### 6.1 Troubleshooting

This section discusses some issues you might encounter and possible resolutions.

#### 6.1.1 Watchlists Are Not Running

If you are using WebSphere Application Server and running JD Edwards EnterpriseOne as part of a federated or clustered web server, you may need to regenerate the WebSphere global plug-in configuration after deploying the newest Tools Release. This is required when new servlets have been added to the Tools Release you are deploying.

To regenerate the WebSphere global plug-in:

1. Open the WebSphere Application Server (WAS) console.
2. Open the Environment tree structure.
3. Select the "Update global Web server plug-in configuration" option.

**Figure 6–1 Update Global Plug-in Configuration**



4. Click OK to generate the new plug-in.
5. Restart the HTTP server to recognize the new file.

### 6.1.2 Update Failed - Query Not Found Error

You may see this error when the system attempts to update a Watchlist. It will occur if the query upon which a Watchlist is based has been deleted, or if the user does not have access to the query. For example, the query might be set up for a particular role that the user is not part of.

To correct the problem:

1. Verify that the query still exists.
2. Ensure that the user has permission to view the query by checking the application query security in P00950. Select Form, User Defined Objects, View to access this information.

### 6.1.3 User Does Not Have Access to Watchlists

If you set up User Defined Object View or Action security for a user and that user still does not have access to Watchlists after signing out and back into JD Edwards EnterpriseOne, you may need to clear the security cache. Go into Server Manager and clear the JDBj security cache to resolve the issue.

## 6.2 Performance Considerations

Watchlists are designed with the goal of reducing the load on the web server. Running a Watchlist with a query requires less overhead than opening the associated application to get that same information. If users can get the information they need from the Watchlist menu without opening an application, this produces a net reduction in web server load and a net gain in productivity.

Having a Watchlist defined with a refresh interval of five minutes does not mean that the Watchlist will run every five minutes. A user action (for example, clicking on the Watchlist dropdown menu) causes the Watchlist to check the refresh interval to see if it should be updated. So Watchlists do not run without user action.

There are multiple configuration settings that help ensure that users cannot set up Watchlists that would adversely affect web server performance. These settings can be found in the Web Runtime section of Server Manager under the Web Objects Settings heading.

Web Objects Setting	Value
Watchlists: Default Max Records to Return	Specify the default value for the "Max Records to Return" field in the Watchlist Management tab. This is used when creating Watchlists.
Watchlists: Upper Limit on Max Records to Return	Specify the largest value a user is allowed to enter in the "Max Records to Return" field for a Watchlist. The user receives an error if he exceeds this value when creating or editing a Watchlist.
Watchlists: Default Refresh Interval	Specify the default value in minutes for the "Refresh Interval" field in the Watchlist Management tab. This is used when creating Watchlists.
Watchlists: Lower Limit on Refresh Interval	Specify the smallest value in minutes that a user is allowed to enter in the "Refresh Interval" field for a Watchlist.
Watchlists: Number of Threads	Specify the maximum number of Watchlists per user that can update simultaneously.

For more information on creating Watchlists, see the *JD Edwards EnterpriseOne Applications One View Watchlists Implementation Guide*.



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# Glossary

## **BI Publisher data model**

An object that contains a set of instructions for BI Publisher to retrieve and structure data for a report. Data models reside as separate objects in the catalog. It includes the sample grid data, form level information, and the reference to the data source.

## **BI Publisher Layout Editor**

A web application that can be used to design all BI Publisher layouts.

## **BI Publisher layouts**

A template file and a set of properties for rendering the template file that define how data is presented in the report. BI Publisher supports templates created from a variety of sources including Microsoft Word, Adobe Reader, Microsoft Excel, Adobe Flash, and BI Publisher's own layout editor. A report can include multiple layouts.

## **BI Publisher report**

A report that consists of a reference to the BI Publisher data model, BI Publisher layouts, properties, and translations.

## **One View report**

An integrated report that contains a JD Edwards EnterpriseOne report definition and a BI Publisher data model and report.

## **One View Watchlist**

A collection of items that match user-defined criteria and contain information to which users have selected to be alerted.

## **personal report**

A One View report that is located in a user's personal folder and owned by that person.

## **report definition**

The JD Edwards EnterpriseOne metadata about the One View report. The report definition contains information about which columns are selected in the data model, the naming conventions, rowset setting, and the name of the report.

## **shared report**

A One View report that is available system-wide, unless it is restricted by security settings. A user cannot directly modify a shared report. Shared reports must be promoted from personal reports by a power user.

