

Oracle
Instantis EnterpriseTrack

EnterpriseTrack Reporting Data Model Administration Guide

Version 19 or Above
June 2020

ORACLE®

Contents

About This Guide.....	5
Enabling the Reporting Data Model.....	7
Creating a Reporting Data Model	7
Configuring EnterpriseTrack Sample Data	9
Creating a Report Using a Sample Report as a Template	9
Linking a Report to a Data Model.....	9
Getting Started with EnterpriseTrack Reports in BI Publisher.....	11
Generating Reports	13
Creating a Data Model.....	13
Creating a Report	13
Setting Up an Email Server for Report Delivery.....	14
Scheduling Reports	14
Joining Tables in a Data Model.....	15
Copyright.....	16

About This Guide

Scope

This guide provides the necessary information and procedures to configure EnterpriseTrack for reporting.

Note: Developer tools are not supported as per Oracle Cloud guidelines.

Enabling the Reporting Data Model

To enable the reporting data model, submit a Service Request to My Oracle Support.

Roles in BI Application

The following roles are added to OBI (BI application):

- ▶ account_Admin_Role: All privileges (Read, Traverse, Write, Edit, Delete, and Run Reports).
- ▶ account_Author_Role: Admin privileges without delete (Read, Traverse, Write, Edit, and Run reports).
- ▶ account_consumer_role: Read only access (Read, Traverse, and Run Reports)

Note:The OBI (BI application) user accounts created for accessing the BI reports are independent of the existing EnterpriseTrack user accounts. There is no configurable consent notice which can be configured using EnterpriseTrack for OBI. It is your responsibility to ensure the consent has been provided by the users through other means.


Creating a Reporting Data Model

A data model is an object that contains a set of instructions that can be used to retrieve and structure data for a report. You can create a reporting data model using the schema for the following entities:

- ▶ Idea
- ▶ Proposal
- ▶ Proposal Team
- ▶ Resource
- ▶ Resource Certification
- ▶ Resource Roles
- ▶ Resource Rates
- ▶ Project
- ▶ Project Team
- ▶ Project Team Allocation
- ▶ Project Phase Dates
- ▶ Project Org Hierarchy
- ▶ Project Notes
- ▶ Project Monthly Finance
- ▶ Project Annual finance
- ▶ Project Monthly Finance Snapshot
- ▶ Project Annual Finance Snapshot
- ▶ Activity

- ▶ Non WBS Activity
- ▶ Activity Resources
- ▶ Metric
- ▶ Alignment 1 to 5
- ▶ Alignment Measure 1 to 5
- ▶ Timesheet Summary
- ▶ Timesheet Detail
- ▶ Timesheet Corrections
- ▶ Timesheet Notes
- ▶ Programs (Non-WBS activity)
- ▶ Programs (WBS activity)

To create a reporting data model:

- 1) Use the  icon on top of the **Left Navigation** bar to expand the **Left Navigation** bar.
- 2) Select **Administration**.
- 3) Navigate to the **Data Import & Export** tab and click **Manage Reporting Data Model**. From the Manage Reporting Data Model page you can view the list of entities, if the data model was changed, the last updated time, the last sync time, and the reporting table name. You can use the reporting table name to map EnterpriseTrack data with the BI schema.
- 4) In the **Entity** column, in the **Configuration Workbench: Manage Reporting Data model** window, select the entities that you want to use in your data model.
- 5) Complete one of the following actions:
 - ▶ Click **Export All Data** to create schema for the selected entities if they do not already exist. Select this option if you are configuring schema users for the first time.
 - ▶ Click **Export Incremental Data** to export incremental updates for the selected entities.
 - ▶ Click **Drop and Recreate Data Model** to drop and recreate the schema of selected entities. Select this option if you have modified your schema since you last created your data model.
- 6) Click **Done**.

Note: To successfully export data, ensure that custom field names have been defined correctly. The first character of a custom field must not contain a number or special characters, such as * or (.

Configuring EnterpriseTrack Sample Data

In This Section

Creating a Report Using a Sample Report as a Template	9
Linking a Report to a Data Model	9

Creating a Report Using a Sample Report as a Template

To create a new report using a sample report:

- 1) Click **Catalog**.
- 2) In the **Folders** tree, select your sample reports folder (for example, `Sample_ET_Reports`).
- 3) Select a sample report (for example, `ProjectReport`) and click **Edit**.
- 4) Click **Save As** and assign the report a new name.
- 5) Navigate to the new report and click **Edit**.
- 6) Click **Select Data Model**.
- 7) Browse to the data model that you want to associate with the sample report and then open it.
- 8) Click **Edit**.
- 9) Modify the report using the **Layout Editor**.
- 10) Click **Save**.

Linking a Report to a Data Model

To link a report to a data model:

- 1) In the **Folders** tree, select your report and click **Edit**.
- 2) Select the **Search (Magnifying Glass)** icon next to the name of the file. The **Select Data Model** opens with the folder structure expanded.
- 3) Locate the data model to use with the report, and select **Ok**.
- 4) Select **Save** to save the data model link to the report. You can select **View Report** to check if the report is linked to the data model.

Getting Started with EnterpriseTrack Reports in BI Publisher

This section includes information that you can use to begin using BI Publisher with EnterpriseTrack.

For detailed descriptions of the features and tasks in BI Publisher, refer to the BI Publisher documentation on Oracle Technical Network.

In This Section

Generating Reports	13
Setting Up an Email Server for Report Delivery	14
Scheduling Reports	14
Joining Tables in a Data Model	15

Generating Reports

Generating reports includes the process of creating a data model to extract information from the reporting views and then developing your report.

In This Section

Creating a Data Model.....	13
Creating a Report.....	13

Creating a Data Model

To create advanced reports, you must use the reporting views to create a data model for your report. A data model is an object that contains a set of instructions for retrieving and structuring data for a report. Using SQL statements or the Query Builder, you must select columns from the views to create a data set that contains the data you want to include in your report data model.

To create a data model:

- 1) Select **New** and click **Data Model**.
- 2) Select the **Properties** node.
- 3) For the XML Output Options, select the **Include Empty Tags for Null Elements** check box.
- 4) In the **Diagram** tab, expand the **New Data Set** list and click **SQL Query**.
- 5) In the **New Data Set - SQL Query** dialog box, complete the following:
 - a. In the **Name** field, enter a name for the query.
 - b. In the **Data Source** list, select an EnterpriseTrack data source.
 - c. In the **Type of SQL** list, select **Standard SQL**.
 - d. Click **Query Builder**.
- 6) In the Query Builder window, complete the following:
 - a. In the **Schema** pane, select a schema table.
 - b. Navigate to the **Conditions** tab and add conditions and functions to the columns.
 - c. Navigate to the **SQL** tab and verify the SQL query.
 - d. Navigate to the **Results** tab and verify the results of the query.
 - e. Click **Save**.
- 7) In the **New Data Set - SQL Query** dialog box, click **OK** to save the data model.
- 8) In the **Data Model** tree, expand **Data Set** and select a data set.
- 9) In the **Data** tab, click **Save As Sample Data**.
- 10) Browse to the EnterpriseTrack reports folder (for example, `ET_Reports`) and save the data model.

Creating a Report

To create a report:

- 1) Click **Create Report**.
- 2) In the **Select Data** window, complete the following:
 - a. Select **Use Data Model**.
 - b. In the **Data Model** field, browse to the location of your data model and open it.
- 3) In the **Select Layout** window, select your **Page Options** and **Layout** (for example, Portrait and Chart and Table).
- 4) In the **Create Chart** window, drag the columns that you want in your chart from the **Data Source** tree to the sample chart.
- 5) In the **Create Table** window, drag the columns that you want in your table from the **Data Source** tree to the sample table.
- 6) In the **Save Report** window, select **View Report** and click **Finish**.
- 7) Browse to the EnterpriseTrack reports folder (for example, `ET_Reports`) and save the report.

Setting Up an Email Server for Report Delivery

To set up an email server for report delivery:

- 1) Click **Administration**.
- 2) Under **Delivery**, click **Email**.
- 3) Click **Add Server**.
- 4) In the General section, complete the following:
 - a. In the Server Name field, enter the name of your email server.
 - b. In the Host field, enter the name of the host on which the email server is located.
 - c. In the Port field, enter the port number for the host.
 - d. In the Secure Connection list, select one of the following:
 - None
 - SSL
 - TLS
 - TLS (Required)
- 5) In the **Security** section, enter the credentials (**Username** and **Password**) of the server administrator.
- 6) Click **Test Connection**.
- 7) Click **Apply**.

Scheduling Reports

To schedule a report:

- 1) Select **New** and click **Report Job**.
- 2) In the **Report** field, in the **General** tab, select the report for which you want to create a job.
- 3) In the **Output** tab, specify the report output and the destination.
- 4) In the **Schedule** tab, complete the following:

- a. In the **Frequency** list, select the frequency of the report job.
 - b. Select **Start** and select a start date and time. Alternatively, select **Run Now**.
- 5) In the **Notification** tab, complete the following:
- a. Select **Notify by**.
 - b. In the **Email Address** field, enter an email address.
 - c. Select one or more of the following:
 - **Report completed**
 - **Report completed with warnings**
 - **Report failed**
 - **Report skipped**
- 6) Click **Submit**.

Joining Tables in a Data Model

The reporting views contain primary and foreign keys which can be used to join views. By joining views, you can combine columns from multiple views to include in a single data model. Primary keys are unique internal identifiers for a single view. Foreign keys are internal identifiers that match the primary key of another view, providing a cross-reference between the two views. To join two views, you must link the foreign key in a view to the primary key in its host view.

To join tables in a data model:

- 1) Click **Catalog**.
- 2) In the **Folders** navigation tree, expand **Shared Folders** and select your EnterpriseTrack reports folder (for example, `ET_Reports`).
- 3) Select a data model and click **Edit**.
- 4) In the **SQL** tab, join the relevant tables on a common column.
- 5) In the **Schema** pane, select and drag a column from one schema to the corresponding column of the schema on which you want the join operation to occur.
- 6) Apply any conditions to the join.
- 7) In the **Results** tab, verify your SQL query.
- 8) Click **Save**.

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