

## **Oracle® Business Intelligence Discoverer**

Publishing Workbooks in Oracle Application Server Portal

10g Release 2 (10.1.2.1)

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# Preface

Welcome to Oracle Business Intelligence Discoverer Publishing Workbooks in Oracle Application Server Portal.

## Intended Audience

Use this guide if you want to publish Discoverer content to OracleAS Portal pages, and you want to know how to:

- register Discoverer Portlet Provider with OracleAS Portal
- publish Discoverer portlets in OracleAS Portal pages
- edit Discoverer portlets in OracleAS Portal pages

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Conventions used in this manual are shown in the table below:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.
< >	Angle brackets enclose user-supplied names or values.
[]	Square brackets enclose optional clauses from which you can choose one or none.
Menu name   Command	Text in this format conveys a sequence of menu choices, e.g. choose the menu, then the command under that menu.

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# Introducing OracleBI Discoverer and OracleAS Portal

This chapter introduces you to OracleBI Discoverer and OracleAS Portal and contains the following topics:

- "What is Oracle Business Intelligence Discoverer?"
- "What is a Discoverer workbook?"
- "What is Oracle Application Server Portal?"
- "What are the different types of Discoverer portlet?"
- "About integrating Discoverer portlets in OracleAS Portal pages"
- "What are Discoverer connections and why do I need to know about them?"

## What is Oracle Business Intelligence Discoverer?

Oracle Business Intelligence Discoverer is an intuitive ad-hoc query, reporting, analysis, and Web publishing toolset that gives business users immediate access to information in databases.

Oracle Business Intelligence Discoverer enables business users at all levels of the organization to make faster and more informed business decisions. Using any standard Web browser, you have secure and immediate access to data from both relational and multidimensional data sources. Oracle Business Intelligence Discoverer provides a business view to hide the complexity of the underlying data structures, enabling you to focus on solving business problems.

Oracle Business Intelligence Discoverer comprises a number of integrated components that work together with the Oracle database to give you a complete and integrated Business Intelligence solution.

## What is a Discoverer workbook?

A Discoverer workbook is simply a named collection of worksheets. Each worksheet contains the data and graphs that you need to extract business information from the database. Each worksheet contains the result of a query.

Worksheets can show information:

- as data points in cells (formatted as tables or as crosstabs)
- as graphs (OracleBI Discoverer supports many different graph types)

You use Discoverer Portlet Provider to enable Discoverer worksheets to be accessed by OracleAS Portal users.

## What is Oracle Application Server Portal?

Oracle Application Server Portal is a component of Oracle Application Server that is used for the development, deployment, administration, and configuration of enterprise-class portals. OracleAS Portal incorporates a portal-building framework with self-service publishing features that enable you to create, publish, and manage information within your portal. Your portal can publish information from your database and other sources, provide and gather information from internal and external customers, and manage the content they will consume.

A portal is made up of groups of pages hosting many different types of content that come from many different sources, all presented from a single location, the portal. The basic structural components of a portal built with OracleAS Portal include page groups, pages, tabs, regions, portlets, and items.

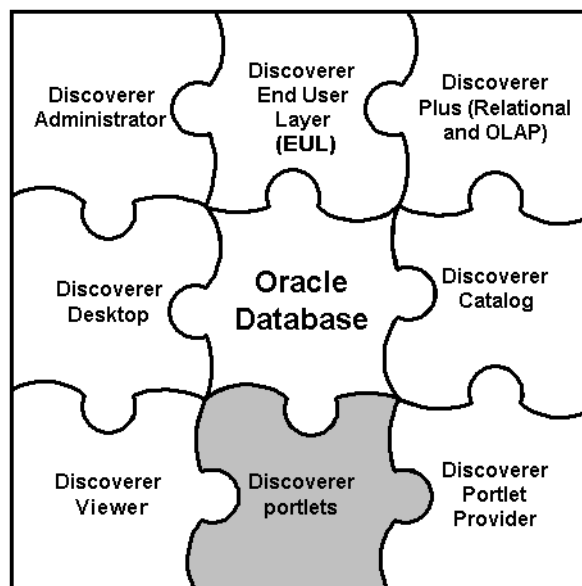
Portlets are reusable information components that summarize or provide access to different types of information sources. You can customize the appearance of portlets on a per user or per group basis. Examples of portlets include a dynamically updated report of quarterly earnings, a Discoverer worksheet, a search field and button, or a simple user poll.

## What are the different types of Discoverer portlet?

The following Discoverer portlets can be published in OracleAS Portal:

- Worksheet portlet (for more information, see "[About the Discoverer Worksheet portlet](#)")
- Gauges portlet (for more information, see "[About the Discoverer Gauges portlet](#)")
- List of Worksheets portlet (for more information, see "[About the Discoverer List of Worksheets portlet](#)")

**Figure 1–1 Discoverer portlets in relation to the Discoverer BI toolset**



## About the Discoverer Worksheet portlet

A Discoverer Worksheet portlet can contain a Discoverer worksheet and a graph.

The portlet publisher can include a link in the portlet (called Analyze) to enable users to open the worksheet in Discoverer Viewer for more detailed analysis (e.g. drill, pivot).

In the figure below, the worksheet portlet called Video Tutorial Workbook - Crosstab Layout contains a Discoverer worksheet for analyzing profit figures for regions over time.

**Figure 1–2 A Discoverer Worksheet portlet**

Analysis of Video Rentals and Video Sales			
Department Video Sale			
	Profit SUM		
	1998	1999	2000
Central	\$67,084	\$97,921	\$69,493
East	\$108,558	\$145,462	\$109,637
West	\$57,096	\$87,172	\$52,092

[Analyze....](#)

For more information, see ["How to add a Discoverer Worksheet portlet to an OracleAS Portal page"](#).

## About the Discoverer Gauges portlet

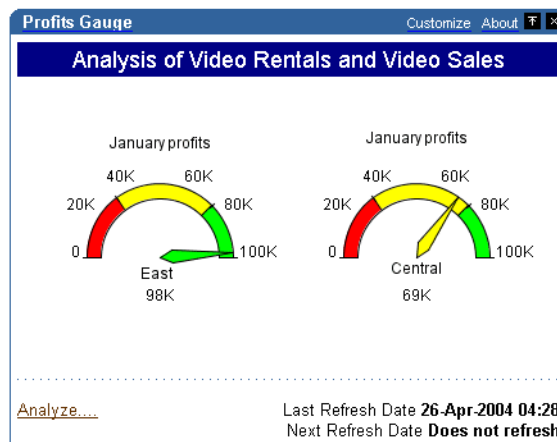
A Discoverer Gauges portlet contains Discoverer worksheet data displayed as one or more semi-circular gauges. The gauges have a similar appearance to a speedometer. A gauge is a way of visualizing data within a range of values.

Discoverer Gauges portlets can only be created for crosstab worksheets.

It is possible to define low, acceptable, and high thresholds. The value ranges reflect key performance indicators (KPIs) for a business. Gauges are commonly used in dashboard applications.

The portlet publisher can include a link in the portlet (called Analyze) to enable users to open the worksheet in Discoverer Viewer for more detailed analysis (e.g. drill, pivot).

The figure below shows a Discoverer Gauges portlet containing two gauges that display monthly profit sum values for East and Central regions.

**Figure 1–3 Discoverer Gauges portlet displayed in an OracleAS Portal page**

For more information, see ["How to add a Discoverer Gauges portlet to an OracleAS Portal page"](#).

## About the Discoverer List of Worksheets portlet

A Discoverer List of Worksheets portlet contains links to Discoverer worksheets. When you click a link in a List of Worksheets portlet, you open the selected worksheet in Discoverer Viewer.

In the figure below, the Discoverer List of Worksheets portlet contains links to worksheets in the Video Tutorial Workbook (e.g. Tabular Layout, Crosstab Layout).

**Figure 1–4 A Discoverer List of Worksheets portlet**

Focus	Name	Type	Owner	Modification Date	Creation Date
▼	MY DRAKE STD				
⊕	▶ Analytic Function Examples	Workbook	VIDEO5	07-Jan-2004 10:21	07-Jan-2004 10:21
⊕	▼ Video Tutorial Workbook	Workbook	VIDEO5	07-Jan-2004 10:21	07-Jan-2004 10:21
	Tabular Layout	Table	VIDEO5	07-Jan-2004 10:21	07-Jan-2004 10:21
	Crosstab Layout	Crosstab	VIDEO5	07-Jan-2004 10:21	07-Jan-2004 10:21

For more information, see ["How to add a Discoverer List of Worksheets portlet to an OracleAS Portal page"](#).

## About integrating Discoverer portlets in OracleAS Portal pages

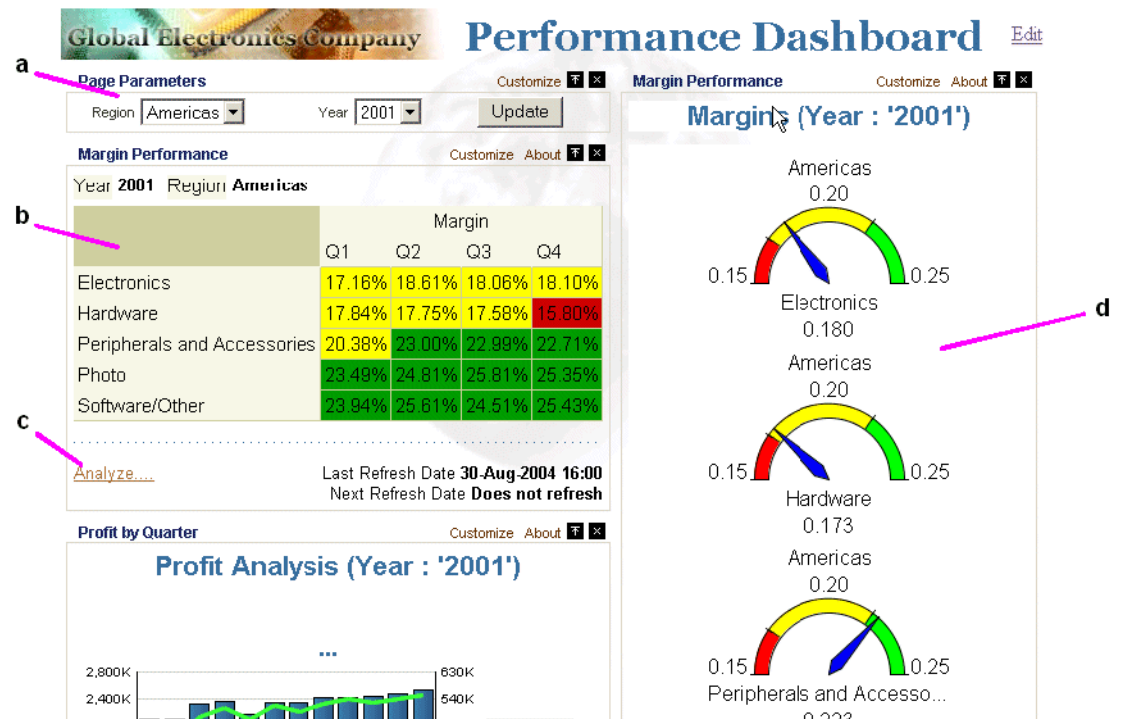
You can integrate Discoverer portlets in OracleAS Portal pages using Discoverer Portlet Provider. Discoverer Portlet Provider is a Discoverer component that provides the Discoverer portlets for publishing Discoverer content in OracleAS Portal pages.

If you have created a Discoverer worksheet in Discoverer Plus Relational, Discoverer Plus OLAP, or Discoverer Desktop, OracleAS Portal makes it easy to publish the worksheet to a portal community.

For more information about portlet types available for Discoverer content, see "[What are the different types of Discoverer portlet?](#)".

The figure below shows a page in OracleAS Portal containing Discoverer portlets.

**Figure 1–5 An example OracleAS Portal page including a Simple Parameter Form portlet, Discoverer Worksheet portlets and a Gauges portlet**



Key to figure:

- a. A Simple Parameter Form portlet.
- b. A Discoverer Worksheet portlet.
- c. An Analyze link that displays the worksheet in Discoverer Viewer. Displaying this link is optional.
- d. A Discoverer Gauges portlet.

There are a number of benefits that are available when you use Discoverer together with OracleAS Portal:

- display multiple crosstabs, tables and graphs from multiple datasources on a single page

Discoverer Portlet Provider is the Discoverer component that enables you to put multiple presentations (crosstabs, tables, graphs) on one page. These presentations can be either from relational or OLAP datasources. Discoverer Portlet Provider also provides an additional visualization - Gauges which is not available elsewhere in Discoverer.

- control portlets through common portal page parameters

Not only can you put multiple presentations on one page, but you can also have all of these presentations driven by a common set of Portal Page-level parameters.

- caching

Discoverer Portlets provide results instantaneously, since they run the queries on a schedule in the background and cache the data for instant display.

- security enables greater control over what the user can see

With Discoverer portlets you can create one portal page and show different results to different users. The data can be striped either by DB users or by SSO users in the database.

- personalization

Discoverer portlets can also be personalized individually by users either through the Customization pages or by clicking the Analyze link.

For more information about OracleAS Portal, see *Oracle Application Server Portal Configuration Guide*.

## What are Discoverer connections and why do I need to know about them?

A Discoverer connection is a stored set of database login details, comprising:

- a database user name - to identify the Discoverer end user
- a database password - to authenticate the Discoverer end user
- a database name - to specify the database containing the information that the Discoverer end user wants to analyze
- (optional) an Oracle Applications Responsibility - to specify a Discoverer end user's responsibility when using Discoverer with Oracle Applications
- (relational data source only) an EUL - to specify the End User Layer to be used
- a language - to specify the language to use in Discoverer

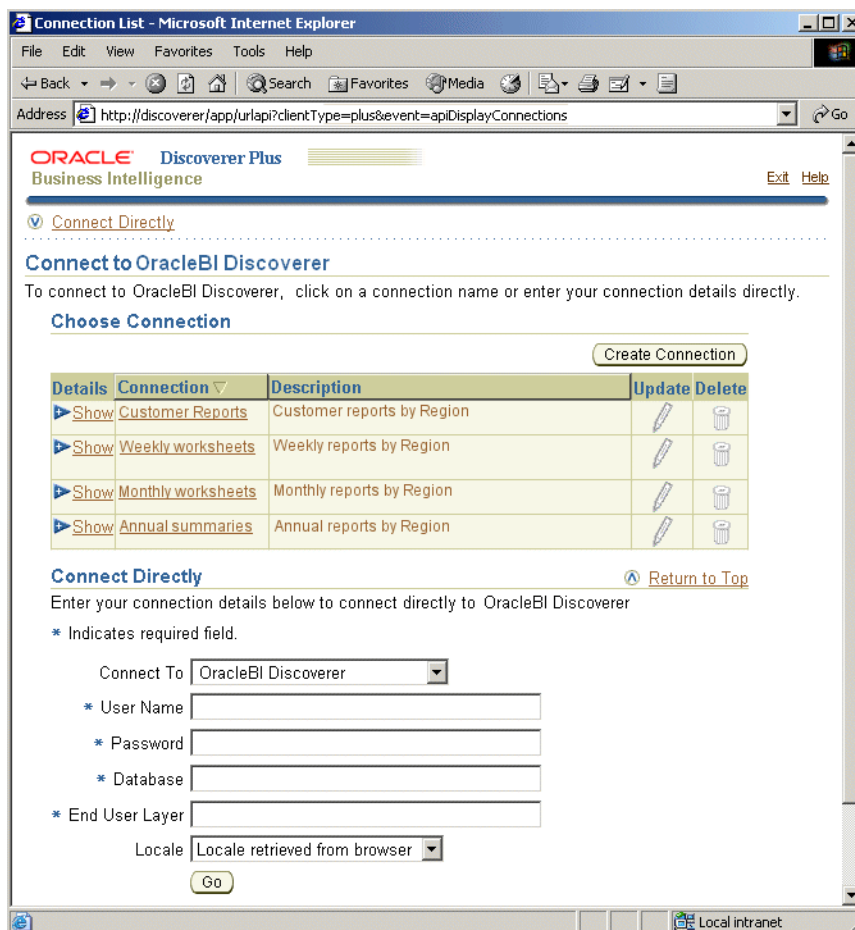
Discoverer connections enable Discoverer end users to start Discoverer without having to re-enter database login details each time they start Discoverer.

**Note:** If you have already used Oracle's Single Sign-On functionality to establish a database connection, you will not be prompted for password information when you start Discoverer.

You need to know about Discoverer connections because a connection must already exist before you can publish Discoverer data in a Discoverer portlet (for more information, see [Chapter 3, "Authoring OracleAS Portal Pages with Discoverer Portlets"](#)).

In the example below, a connection called Customer Reports has been created that contains login information to connect to the database containing the reports.

**Figure 1–6 Connections page in OracleBI Discoverer Plus/Plus OLAP**







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## Setting up Discoverer Portlet Provider in OracleAS Portal

This chapter explains how to set up Discoverer Portlet Provider in OracleAS Portal, and contains the following topics:

- "What are the prerequisite tasks and which roles are involved for publishing Discoverer portlets in OracleAS Portal?"
- "How to publish Discoverer portlets in OracleAS Portal"
- "An overview of registering Discoverer Portlet Provider with OracleAS Portal"
- "How to register Discoverer Portlet Provider with OracleAS Portal"
- "How to edit Discoverer Portlet Provider after it has been registered with OracleAS Portal"
- "Notes about changing the default performance settings for Discoverer"
- "How to upgrade a 9.0.4 metadata repository to work with Discoverer Portlet Provider Version 10.1.2 and Oracle Portal 10.1.2"
- "About copying Discoverer portlets from one Oracle Business Intelligence installation to another"

### What are the prerequisite tasks and which roles are involved for publishing Discoverer portlets in OracleAS Portal?

The prerequisite tasks for publishing Discoverer portlets in OracleAS Portal are listed below along with the roles that carry out each task:

- **Install Oracle Application Server Infrastructure.**

Oracle Application Server Infrastructure is installed by the OracleAS administrator.

For more information, see *Oracle Application Server Installation Guide*.

- **Install Oracle Application Server Portal.**

Oracle Application Server Portal is installed by the OracleAS administrator.

**Note:** To use Discoverer with OracleAS Portal, make sure that the `OsoIPCheck` parameter value in the `mod_osso.conf` file is set to `FALSE`.

For more information, see *Oracle Business Intelligence Discoverer Configuration Guide*.

- **Install Oracle Business Intelligence.**

Oracle Business Intelligence is installed by the OracleAS administrator.

For more information, see *Oracle Business Intelligence Installation Guide*.

- **Associate a standalone Oracle Business Intelligence installation with an Oracle Application Server Infrastructure.**

Association is carried out in Oracle Application Server Control by an Oracle Application Server administrator, a middle tier administrator, or the Discoverer manager.

For more information, see *Oracle Application Server Installation Guide* and *Oracle Business Intelligence Discoverer Configuration Guide*.

- **Register Discoverer Portlet Provider.**

Discoverer Portlet Provider is registered in Oracle AS Portal by the Oracle Application Server administrator.

For more information, see [Chapter 2, "Setting up Discoverer Portlet Provider in OracleAS Portal"](#) (this guide).

- **Create a Discoverer worksheet.**

Discoverer worksheets are created by Discoverer Plus or Discoverer Desktop end users.

For more information, see *Oracle Application Server Installation Guide* and *Oracle Business Intelligence Discoverer Configuration Guide*.

**Note:** Before you can create a Discoverer worksheet the following tasks must have been completed:

- Create Metadata (EUL or Discoverer Catalog).

EUL Metadata is created in Oracle Discoverer Administrator by the Discoverer manager. The Discoverer Catalog Metadata is installed in Oracle Application Server Control by the Oracle Application Server administrator.

For more information, see *Oracle Application Server Installation Guide* and *Oracle Business Intelligence Discoverer Configuration Guide*.

- Create a public/private connection.

Public connections are created in Oracle Application Server Control by the Discoverer manager. Private connections are created in Discoverer Plus and Discoverer Viewer by end users. For more information, see:

- \* Oracle Business Intelligence Discoverer Configuration Guide
- \* Oracle Business Intelligence Discoverer Plus User's Guide
- \* Oracle Business Intelligence Discoverer Viewer User's Guide

- **Add Discoverer portlets.**

Discoverer portlets are added in OracleAS Portal, typically by Discoverer Plus and Discoverer Viewer end users.

For more information, see [Chapter 3, "Authoring OracleAS Portal Pages with Discoverer Portlets"](#) (this guide)

**Note:** Many of the initial tasks listed above are likely to have already been completed during or after installation.

## How to publish Discoverer portlets in OracleAS Portal

To publish Discoverer portlets in OracleAS Portal, do the following:

1. (Optional) Make sure that Discoverer Portlet Provider is installed correctly by entering the following URL in an Internet browser:

`http://<host.domain>:<port>/discoverer/portletprovider/`

If Discoverer Portlet Provider is installed correctly, you will see the PDK-Java test page, displaying the message 'Congratulations! You have successfully reached your Provider's Test Page'. The test page also lists the Discoverer portlet types available.

2. Register Discoverer Portlet Provider with OracleAS Portal (for more information, see ["How to register Discoverer Portlet Provider with OracleAS Portal"](#)).

This step only needs to be performed once (after installation). Typically, Oracle Application Server administrators register the Discoverer Portlet Provider.

3. Use OracleAS Portal to add Discoverer portlets to portal pages (for more information, see [Chapter 3, "Authoring OracleAS Portal Pages with Discoverer Portlets"](#)).

Typically, a portal page designer would add Discoverer portlets to portal pages.

## An overview of registering Discoverer Portlet Provider with OracleAS Portal

You must register Discoverer Portlet Provider with OracleAS Portal before you can publish Discoverer worksheets in OracleAS Portal pages. You can only register Discoverer Portlet Provider with OracleAS Portal once.

When you have registered Discoverer Portlet Provider with OracleAS Portal you can then publish Discoverer portlets in OracleAS Portal pages (for more information, see [Chapter 3, "Authoring OracleAS Portal Pages with Discoverer Portlets"](#)).

## How to register Discoverer Portlet Provider with OracleAS Portal

You register Discoverer Portlet Provider to enable OracleAS Portal end users to add Discoverer business intelligence portlets to their portal pages.

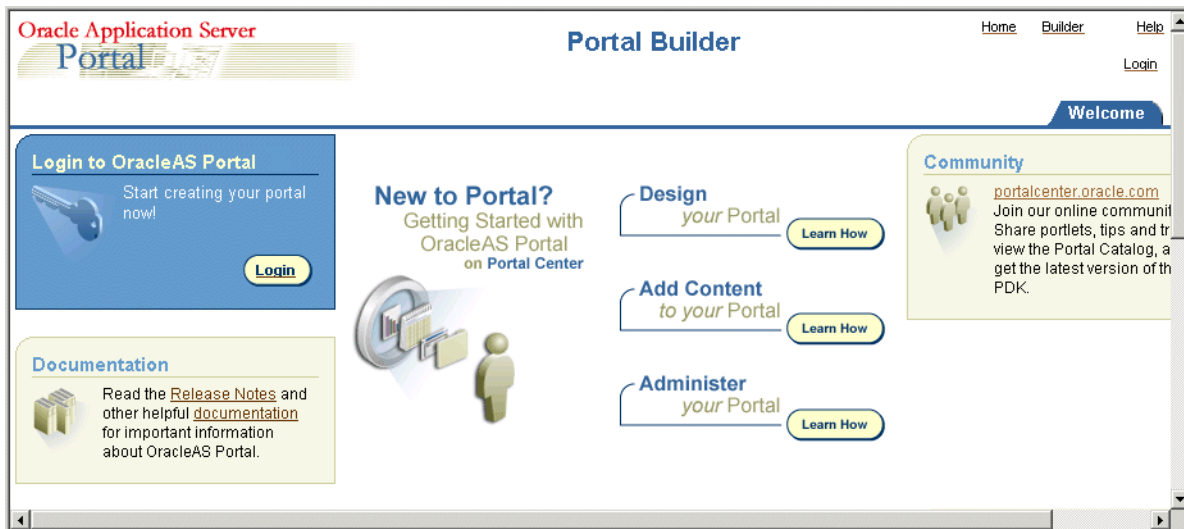
To register Discoverer Portlet Provider with OracleAS Portal:

1. Start a Web browser and enter the URL for OracleAS Portal.

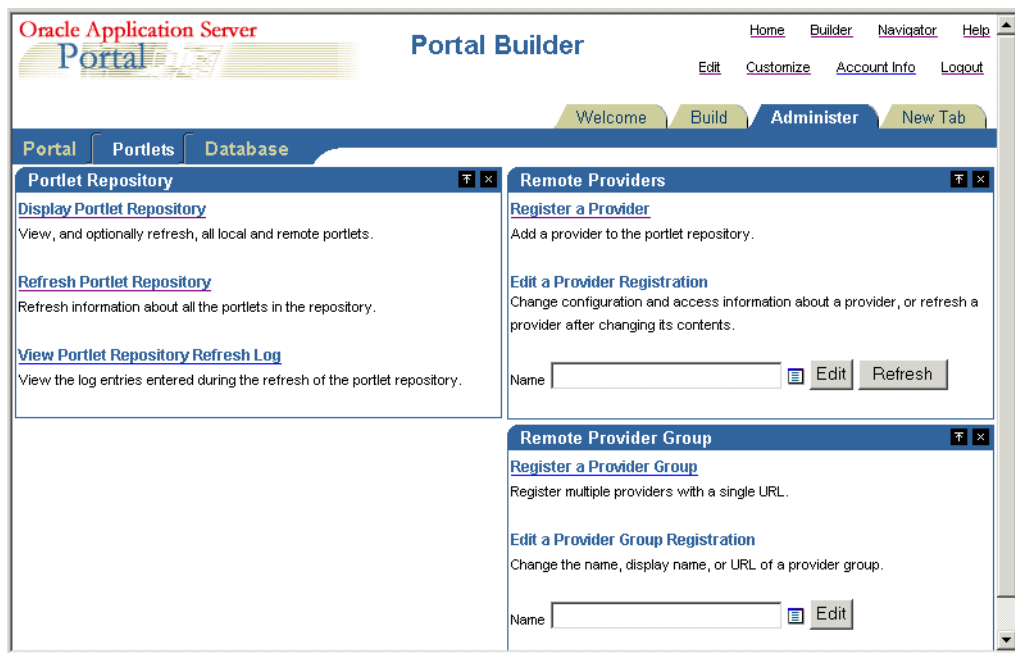
For example:

`http://<host.domain>:<port>/pls/portal`

For more information about displaying the OracleAS Portal main page, contact the OracleAS Portal administrator.



2. Click **Login** and connect as a Portal administrator.
3. Display the Administer tab.
4. Display the Portlets sub-tab.



5. Select the **Register a Provider** link to display the Provider Information page.

**Add Provider** ?

Step 1 of 3 >>>

### Provider Information

Enter a unique name for the provider, the timeout (in seconds), the timeout message, and the provider implementation style. The timeout message is presented to the user when a portlet takes longer than the specified time to execute.

Name: Discoverer01

Display Name: Business Intelligence

Timeout: 100 seconds

Timeout Message: Sorry, timing out

Implementation Style: Web

Next > Cancel

6. Enter the Discoverer Portlet Provider details.

You can enter any name and display name for the Discoverer Portlet Provider. The name and display name can be different.

**Hint:** Give the Portlet Provider a useful display name because users will see this name when they add a Discoverer portlet to a portal page.

7. Choose Web from the **Implementation Style** drop down list.

8. Click Next to display the Define Connection page.

**Define Connection** ?

< Previous Next > Finish Cancel

Step 2 of 3 >>>

### General Properties

Specify the URL for the Web provider and configure its communication settings.

URL:

☐ Web provider in same cookie domain as the portal

Enter the Service Id, if applicable. Multiple providers can now be accessed via the same URL. The Service Id identifies a specific provider that can be accessed via the specified URL.

Service Id:

(example: "urn:ADAPTER\_PROVIDER" or "urn:webProvider")

Specify how the user's identity will be set by the Portal when communicating with the Web provider.

☒ The user has the same identity in the Web providers application as in the Single Sign-On identity.

☐ The user's identity needs to be mapped to a different name in the Web

9. Enter the Portlet Provider general properties as follows:

- a. Enter the URL of the Discoverer Portlet Provider in the **URL** field, in the form:

`http://<host.domain>:<port>/discoverer/portletprovider` (e.g.  
`http://myserver:80/discoverer/portletprovider`)

- b. Clear the **Web Provider in same cookie domain as the portal** check box.
- c. Select the **The user has the same identity in the Web providers application as in the Single Sign-On identity** radio button.
- d. In the User/Session Information area, select the **User** radio button, and select the Once Per User Session option from the **Login Frequency** field.

**Note:** Do not change the default value of other fields.

10. Click Next to display the Control Access page.



11. (optional) Change the default access control settings if necessary.

12. Click Finish.

End users can now use the Discoverer Portlet Provider to add portlets to an OracleAS Portal page.

### Notes

- If you want Discoverer end users to publish workbooks and worksheets using a public connection, use Oracle Application Server Control to create the public connection (for more information about creating public connections, see the *Oracle Business Intelligence Discoverer Configuration Guide*).

## How to edit Discoverer Portlet Provider after it has been registered with OracleAS Portal

You edit the Discoverer Portlet Provider when you want to change the way that it works. For example, you might want to change the Discoverer Portlet Provider Display Name, or change its Control Access settings.

To edit the Discoverer Portlet Provider:

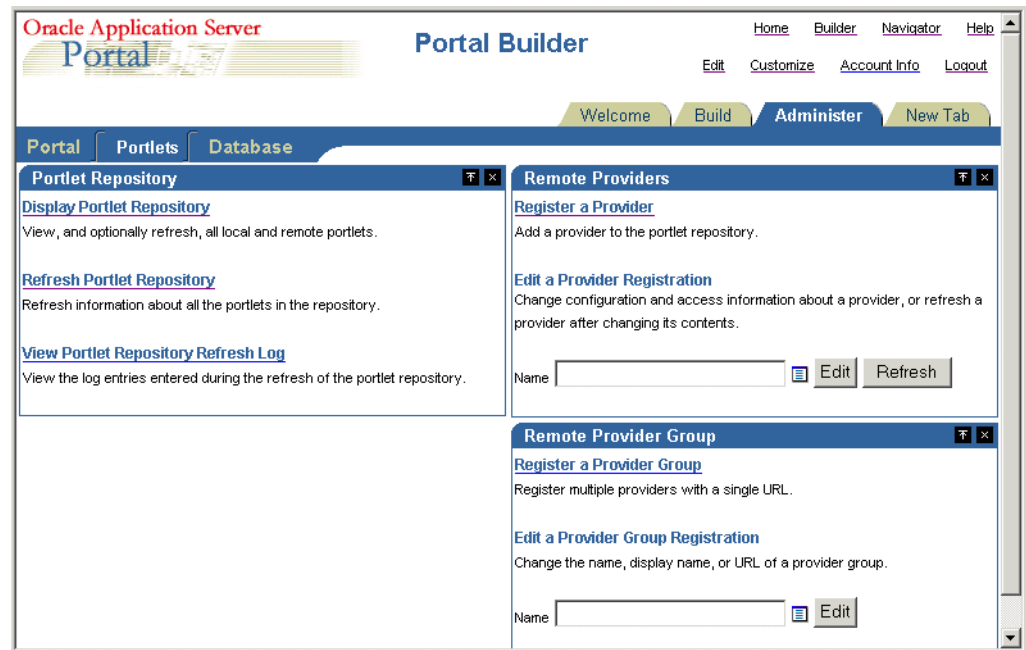
1. Start a Web browser and enter the URL for the OracleAS Portal main page.

For example:

`http://<host.domain>:<port>/pls/portal`

For more information about displaying the OracleAS Portal main page, contact the OracleAS Portal administrator.

2. Display the Administer tab.
3. Display the Portlets sub-tab.



4. In the **Remote Providers** area, enter the name of the Discoverer Portlet Provider (i.e. its display name) in the **Name** field, and click Edit to display the Provider Information page.

**Hint:** If you are not sure of the display name of the Discoverer Portlet Provider, do the following:

- a. Click the Browse Providers icon to the right of the **Name** field.
- b. Choose the Discoverer Portlet Provider name from the list of Portlet Providers displayed.

**Hint:** The name that you choose is the display name that was specified when you registered the Discoverer Portlet Provider (for more information, see ["How to register Discoverer Portlet Provider with OracleAS Portal"](#)).

- c. Click Edit to display the Edit Portlet Provider page.
5. Make the necessary changes, as follows:
    - use the Main tab to change provider information (e.g. the display name of the Discoverer Portlet Provider)
    - use the Connection tab to change general properties (e.g. the URL of the Discoverer Portlet Provider)

- use the Access tab to change the access privileges (e.g. the control access settings of the Discoverer Portlet Provider)
6. Click OK to save the changes you have made.

The Discoverer Portlet Provider is updated according to changes you have made.

## Notes about changing the default performance settings for Discoverer

You might want to change the default performance settings for Discoverer to improve Discoverer performance.

For more information about changing the default performance settings for Discoverer, see the *Oracle Business Intelligence Discoverer Configuration Guide*.

## How to upgrade a 9.0.4 metadata repository to work with Discoverer Portlet Provider Version 10.1.2 and Oracle Portal 10.1.2

OracleBI Discoverer Portlet Provider 10.1.2 can be used with either OracleAS Portal 10.1.2 or OracleAS Portal 9.0.4. To use OracleBI Discoverer Portlet Provider with OracleAS Portal 10.1.2, see Chapter 2 and Chapter 11 in the *Oracle Business Intelligence Discoverer Configuration Guide*.

This section provides instructions on how to use OracleBI Discoverer Portlet Provider 10.1.2 with OracleAS Portal 9.0.4.

If you want to use OracleBI Discoverer Portlet Provider 10.1.2. with OracleAS Portal 9.0.4, you must upgrade only the OracleBI Discoverer part of the 9.0.4 OracleAS Metadata Repository (MR) using the upgradeMR script as described in this section.

Using the upgradeMR script to upgrade just the OracleBI Discoverer part of the MR will allow OracleAS Portal to continue to work against the MR. In other words, you will not have to upgrade your OracleAS Portal instance to 10.1.2.

If you use the OracleAS Metadata Repository Upgrade Assistant 10.1.2 to update an OracleAS Metadata Repository from 9.0.4 to 10.1.2, you also upgrade the OracleAS Portal 9.0.4 schema to 10.1.2. As a result, OracleAS Portal 9.0.4. will no longer work against the MR. Do not use the OracleAS Metadata Repository Upgrade Assistant 10.1.2 to upgrade the OracleAS Metadata Repository if you want to continue to use OracleAS Portal 9.0.4.

To use OracleBI Discoverer Portlet Provider 10.1.2 with OracleAS Portal 9.0.4:

1. Associate Oracle Business Intelligence with the Oracle Application Server Infrastructure that is associated with the OracleAS Portal that you want to use  
  
For more information, see Chapter 2 (Section 2.2 How to associate and reassociate an OracleBI installation with an OracleAS infrastructure) in the *Oracle Business Intelligence Discoverer Configuration Guide*.
2. Upgrade the OracleBI Discoverer part of the OracleAS Metadata Repository (for more information, see [Section , "How to upgrade just the OracleBI Discoverer part of a Metadata Repository"](#)).
3. Do one of the following to register OracleBI Discoverer Portlet Provider 10.1.2 with OracleAS Portal 9.0.4:
  - If you have an existing OracleBI Discoverer Portlet Provider 9.0.4 registered with OracleAS Portal, then change the registration of the OracleBI Discoverer Portlet Provider to use the URL of the OracleBI Discoverer Portlet Provider 10.1.2.



You need to change the registration of OracleBI Discoverer Portlet Provider to OracleBI Discoverer Portlet Provider 10.1.2. because the OracleBI Discoverer Portlet Provider 9.0.4 will no longer work once the Discoverer part of the MR is upgraded to 10.1.2.

- If you do not have an existing OracleBI Discoverer Portlet Provider registered with OracleAS Portal, register OracleBI Discoverer Portlet Provider 10.1.2 with OracleAS Portal.

For more information, see Chapter 11 of the *Oracle Business Intelligence Discoverer Configuration Guide*.

### Notes

- If you use OracleBI Discoverer Portlet Provider 10.1.2 with OracleAS Portal 9.0.4, then note that:
  - The color picker is not available. As a result you can only create gauges with the default colors.
  - The date picker is not available. As a result, when you specify refresh schedules for portlets using the Set Refresh Options page, you must enter the date as text in the 'First Refresh Date' field (e.g. 25-JAN-2005).

## How to upgrade just the OracleBI Discoverer part of a Metadata Repository

You upgrade just the OracleBI Discoverer part of the OracleAS Metadata Repository 9.0.4 to work with OracleBI Discoverer Portlet Provider 10.1.2 using a script that is located in the following place in the OracleBI Discoverer installation:

ORACLE\_HOME\discoverer\util\upgradeMR.bat (for Windows)  
ORACLE\_HOME/discoverer/util/upgradeMR.sh (for Solaris)

To upgrade an OracleAS Metadata Repository 9.0.4 to work with OracleBI Discoverer Portlet Provider 10.1.2, complete the following steps:

1. Before running the script, ensure that the ORACLE\_HOME environment variable is set to the OracleBI Discoverer home directory.
2. On the Oracle Business Intelligence machine, open a command prompt and run the upgradeMR script.

For example, on a Unix machine, enter the following command:

```
upgradeMR.sh
```

You are prompted to confirm that you want to upgrade the OracleBI Discoverer schema in the OracleAS Metadata Repository to 10.1.2.

3. Enter 'y' in response to the prompt.  
You are prompted to enter a user name and password.
4. Enter the user name and password of the SYSTEM user on the database that has the OracleAS Metadata Repository.

Output from the script is displayed on the console and is also logged in the MRUpgrade.log file in the util directory. For example, on Solaris the log file is located in:

```
ORACLE_HOME/discoverer/util/MRUpgrade.log.
```

**Note:** Once you upgrade the OracleBI Discoverer part of the OracleAS Metadata Repository, you will be able to use only OracleBI Discoverer Portlet Provider 10.1.2.

You will no longer be able to use OracleBI Discoverer Portlet Provider 9.0.4 with this OracleAS Portal and OracleAS Infrastructure.

## About copying Discoverer portlets from one Oracle Business Intelligence installation to another

After you have installed Oracle Business Intelligence, you might want to deploy existing Discoverer portlets created on a different OracleAS Portal installation. To deploy existing Discoverer portlets, you copy the portal pages and portlets to the new Oracle Business Intelligence installation.

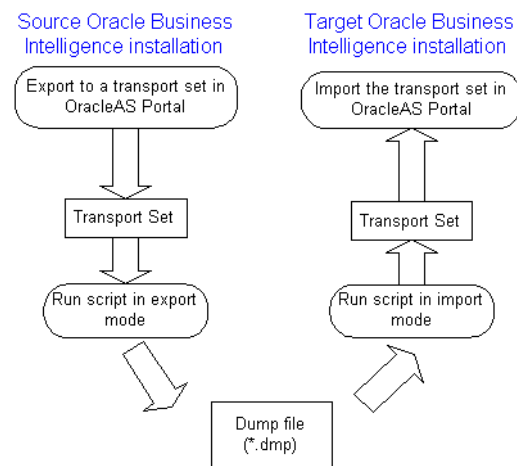
### How to copy Discoverer portlets from one Oracle Business Intelligence installation to another

You copy Discoverer portlets using OracleAS Portal's export and import facilities for transport sets. A transport set is a collection of portal objects for export.

**Note:** Before you copy Discoverer portlets, you must first copy any Discoverer connections used by the portlets. For more information, see ["How to copy Discoverer connections from one Oracle Business Intelligence installation to another"](#).

The figure below shows the high level steps to copy Discoverer portlets.

**Figure 2-1 Copying Discoverer portlets from one Oracle Business Intelligence installation to another**



**Note:** The source and target Oracle Business Intelligence installations can be on the same machine, or on different machines.

To copy Discoverer portlets from one Oracle Business Intelligence installation to another:

1. Copy any Discoverer connections used by the Discoverer portlets to the target Oracle Business Intelligence installation (for more information, see ["How to copy Discoverer connections from one Oracle Business Intelligence installation to another"](#)).
2. If the source and target Oracle Business Intelligence installations do not share the same infrastructure, you must register the new Discoverer Portlet Provider on the target installation with the same name as that used on the source installation.

For example, if the Discoverer Portlet Provider is registered with the name 'Discoverer01' on the source installation, you must register the new Discoverer Portlet Provider on the target installation with the name 'Discoverer01'.

For more information about registering Discoverer Portlet Provider, see ["How to register Discoverer Portlet Provider with OracleAS Portal"](#).

3. On the source Oracle Business Intelligence installation, connect to OracleAS Portal and export a page or page group to a transport set (for more information, see ["How to export Discoverer portlets to a transport set"](#)).

When you export a transport set, OracleAS Portal generates a UNIX script and a Windows script that you can run:

- in export mode to copy a transport set to a dump (\*.dmp) file
  - in import mode to extract a transport set from a dump (\*.dmp) file
4. On the source Oracle Business Intelligence installation, run the script generated by OracleAS Portal in export mode to create a dump (\*.dmp) file containing the transport set (for more information, see ["How to create a dump \(\\*.dmp\) file to copy the Discoverer portlets"](#)).
  5. If the source installation and target installation are on different machines, copy the dump (\*.dmp) file and the script from the source machine to the target machine.
  6. On the target Oracle Business Intelligence installation, run the script generated by OracleAS Portal in import mode to extract the transport set from the dump (\*.dmp) file (for more information, see ["How to extract a transport set from a dump \(\\*.dmp\) file"](#)).
  7. On the target Oracle Business Intelligence installation, connect to OracleAS Portal and import the exported page or page group as a transport set (for more information, see ["How to import a transport set into OracleAS Portal"](#)).

### How to log in to OracleAS Portal

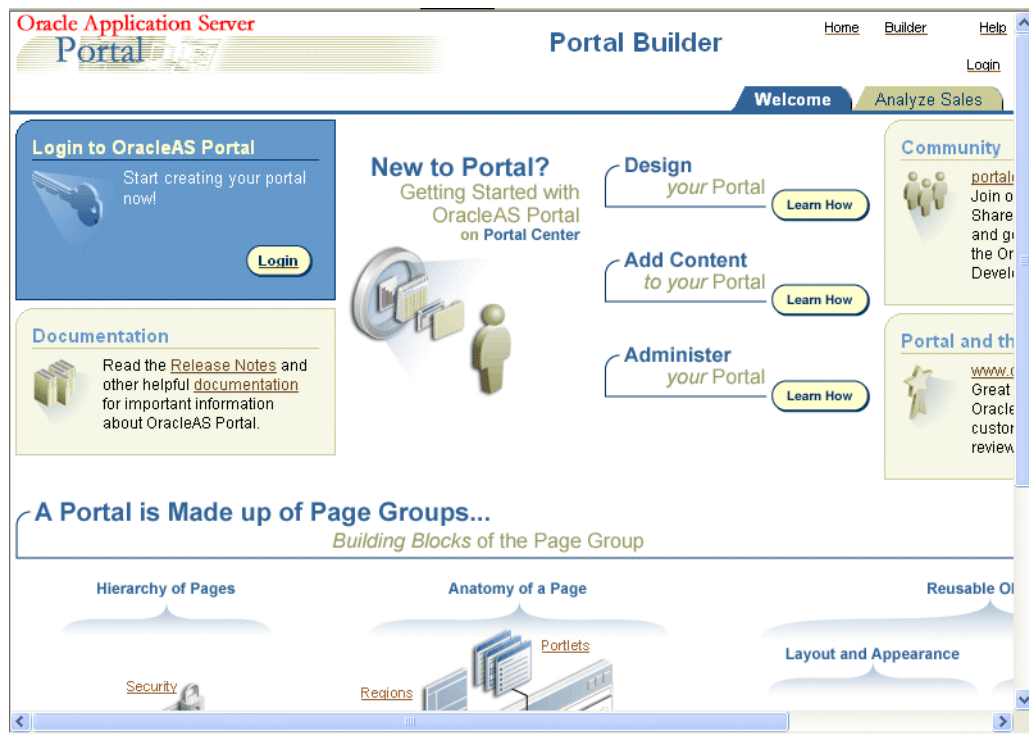
You log in to OracleAS Portal to enable you to view and edit OracleAS Portal content, and perform administrative tasks. For example, you might want to add new portlets to a portal page.

To log in to OracleAS Portal:

1. Launch a Web browser.
2. Display the OracleAS Portal main page.

**Hint:** The web address of the OracleAS Portal might be:

- the default web page that you access when you start a browser
- an internet address (URL) that you enter in the address field in a browser (e.g. a typical URL might be <http://machinename.myorganization.com:7777/pls/portal>)
- a link from a portal or other internet or intranet site that you are using



3. Click Login to display the Sign In page.
4. Enter the user name and password of a Single Sign-On user with administrator privileges.

For example, to log in as the OracleAS Portal administrator, you might log in using the username 'orcladmin'.

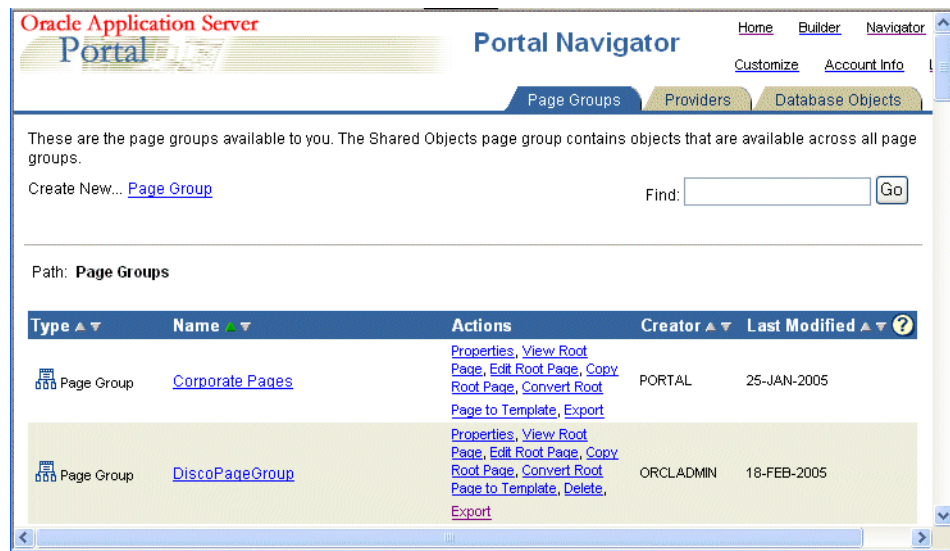
You can now view and edit OracleAS Portal content, and perform administrative tasks.

### How to export Discoverer portlets to a transport set

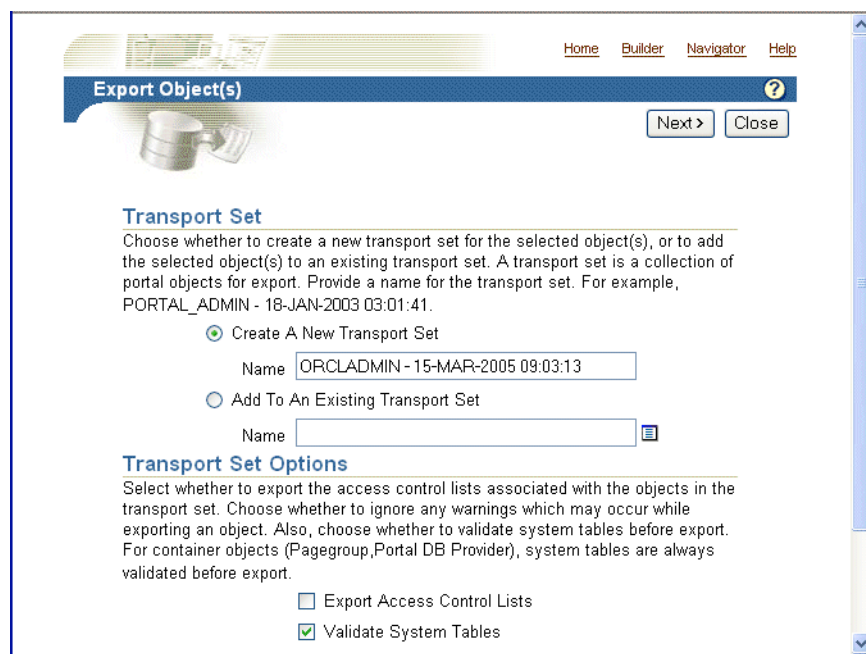
You export Discoverer portlets to a transport set in OracleAS Portal to enable you to copy them from one Oracle Business Intelligence installation to a different installation.

To export Discoverer portlets to a transport set:

1. On the source installation, log in to OracleAS Portal as a user with administrator privileges (for more information, see ["How to log in to OracleAS Portal"](#)).
2. Select the **Navigator** link to display the Portal Navigator page.



3. Select the **Export** link in the **Actions** column next to the name of Page or Page Group that you want to copy, to display the Export Objects page.

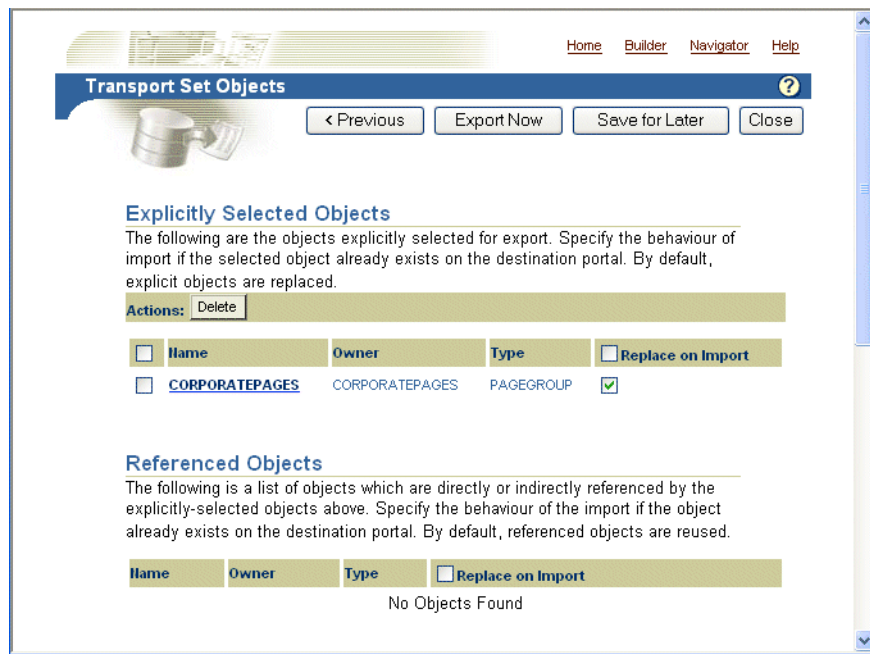


Do not change the default values of the other fields on this page.

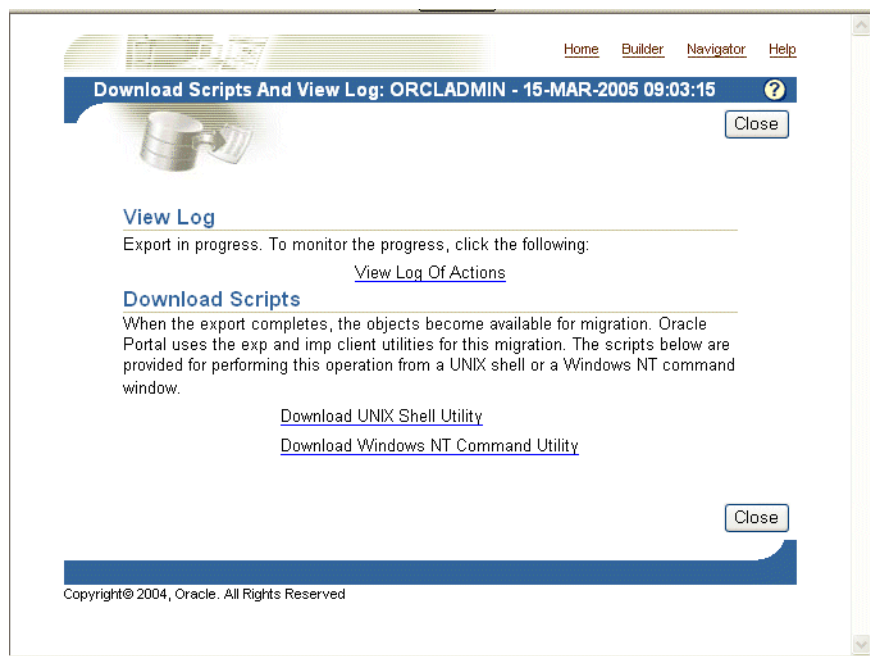
4. Select the **Create A New Transport Set** radio button.
5. If you want to change the default transport set name, edit the default name in the **Name** field.

The transport set name that you specify is used to identify the transport set in OracleAS Portal (e.g. if you import or delete it).

6. Click Next to display the Transport Set Objects page.



7. In the **Explicitly Selected Objects** table, do one of the following:
  - if the source and target Oracle Business Intelligence installations do not share the same infrastructure, clear the check box in the **Replace on Import** column
  - if the source and target Oracle Business Intelligence installations do share the same infrastructure, select the check box in the **Replace on Import** column
8. Click **Export Now** to display the **Download Scripts And View Log** page.



9. Select the **View Log of Actions** link to monitor the status of the export.  
Refresh the browser window until the export is complete. When the export is complete, the log entry 'Completed On: <date and time>' is displayed. OracleAS

Portal does not display a pop-up message informing you that the export has been completed.

10. Click Close to return to the Download Scripts And View Log page.
11. In the **Download Scripts** area, select the link for the platform you are using to display the script in the browser window.  
For example, select the **Download UNIX Shell Utility** link for UNIX platforms.
12. Save the script in the browser (e.g. in Internet Explorer, choose File | Save As, and select a file name and location).
13. Click the Back button in the browser to return to the Download Scripts And View Log page
14. Click Close.

You have now exported the Discoverer portlets to a transport set. The next step is to create a dump (\*.dmp) file. For more information, see ["How to create a dump \(\\*.dmp\) file to copy the Discoverer portlets"](#).

### How to obtain the PORTAL login password

To run scripts generated by OracleAS Portal you need the PORTAL login password for the OracleAS infrastructure database. If you do not know the PORTAL login password, use the ldapsearch command to obtain the PORTAL login password.

To obtain the PORTAL login password:

1. At a command prompt, enter the ldapsearch command using the following syntax:

```
ldapsearch -h directory_host_name -p directory_port -D
directory_bind_dn -w directory_bind_dn_password -b
"orclReferenceName=infrastructure_database"
"orclresourcename=PORTAL" orclpasswordattribute
```

For more information about the ldapsearch command, see *Oracle Internet Directory Administrator's Guide*.

### How to create a dump (\*.dmp) file to copy the Discoverer portlets

Having exported Discoverer portlets to a transport set, you now run the script generated by OracleAS Portal in export mode to create a dump (\*.dmp) file.

To create a dump (\*.dmp) file to copy the Discoverer portlets:

1. On the source Oracle Business Intelligence installation, run the script generated by OracleAS Portal by entering the following command at the command prompt:

```
<script name> -mode export -s portal -p <PORTAL login
password> -c <database connect string> -d <*.dmp file>
```

Where:

- <script name> is the name of the script file generated by OracleAS Portal (e.g. my\_script.sh). You specify the script name when you export the transport set.
- <PORTAL login password> is the PORTAL login password for the OracleAS infrastructure database. For more information about obtaining the PORTAL login password, see ["How to obtain the PORTAL login password"](#).
- <database connect string> is the login details for the infrastructure database.
- <\*.dmp file> is the name you want to give dump file.



For example, if the script is called `my_script.sh`, you might type:

```
my_script.sh -mode export -s portal -p mypassword -c db1 -d exp.dmp
```

2. If the source Oracle Business Intelligence installation and target installation are on different machines, copy the dump (\*.dmp) file and the generated script to the target machine (e.g. using FTP).

You have now created a dump (\*.dmp) file containing the transport set. The next step is to extract the transport set from the dump (\*.dmp) file on the Oracle Business Intelligence installation (for more information, see ["How to extract a transport set from a dump \(\\*.dmp\) file"](#)).

### How to extract a transport set from a dump (\*.dmp) file

Having created a dump (\*.dmp) file, you now run the script generated by OracleAS Portal in import mode to extract the transport set from the dump (\*.dmp) file on the target Oracle Business Intelligence installation.

To extract a Transport Area from a dump (\*.dmp) file:

1. On the target Oracle Business Intelligence installation, run the script generated by OracleAS Portal by entering the following command at the command prompt:

```
<script name> -mode import -s portal -p <PORTAL login  
password> -pu <target portal username> -pp <password of  
target portal user> -company none -c <database connect  
string> -d <*.dmp file>
```

Where:

- <script name> is the name of the script file generated by OracleAS Portal (e.g. `my_script.sh`). You specify the script name when you export the transport set.
- <PORTAL login password> is the PORTAL login password for the OracleAS infrastructure database. For more information about obtaining the PORTAL login password, see ["How to obtain the PORTAL login password"](#).
- <database connect string> is the login details for the infrastructure database.
- <\*.dmp file> is the name of the dump file containing the transport set.

For example, if the export file is called `my_script.sh`, you might type:

```
my_script.sh -mode import -s portal -p mypassword -pu  
orcladmin -pp adminpassword -company none -c db1 -d exp.dmp
```

You have now extracted the transport set from the dump (\*.dmp) file. The next step is to import the transport set into OracleAS Portal (for more information, see ["How to import a transport set into OracleAS Portal"](#)).

### How to import a transport set into OracleAS Portal

Having extracted a transport set from a dump (\*.dmp) file, the next step is to import the Discoverer portlets in OracleAS Portal.

To import a transport set into OracleAS Portal:

1. On the target Oracle Business Intelligence installation, log in to OracleAS Portal as a user with administrator privileges (for more information, see ["How to log in to OracleAS Portal"](#)).
2. Display the Administer tab.



The screenshot shows the OracleAS Portal Administration console with the 'Administer' tab selected. The console is divided into several panels:

- SSO Server Administration:** Contains links for 'Edit SSO Server Configuration', 'Administer Partner Applications', and 'Administer External Applications'.
- User:** Contains links for 'Create New Users' and 'Edit/Delete User'.
- Export/Import Transport Set:** Contains links for 'Export a Transport Set' and 'Import a Transport Set'.
- Portal User Profile:** Contains a link for 'Edit/Delete User'.
- Group:** Contains links for 'Create New Groups' and 'Edit/Delete Group'.

The 'Import a Transport Set' section is highlighted, showing a 'Name' field and an 'Import' button.

3. In the **Import A Transport Set** area, click the Browse button next to the **Name** field and select the transport set to import.

The name of the selected transport set is displayed in the **Name** field.

This screenshot shows a closer view of the 'Export/Import Transport Set' panel. The 'Import a Transport Set' section is active, and the 'Name' field now contains the text 'ORCLADMIN - 15-MAR-2005'. The 'Import' button is visible next to the field.

4. Click Import to start the import process.

OracleAS Portal displays the Import transport set page.



5. In the **Explicitly Selected Objects** table, make sure that the check box in the **Replace on Import** column is selected.
6. Click **Import Now** to start the import.  
The **View Log** page is displayed.
7. Select the **View Log of Actions** link to monitor the status of the export.  
Refresh the browser window until the import is complete. When the import is complete, the log entry 'Completed On: <date and time>' is displayed.
8. Click **Close** to return to the **View Log** page.
9. Click **Close** to return to the **Administer** tab.

You have now imported the Discoverer portlets into OracleAS Portal. OracleAS Portal users can now use their existing Discoverer portlets on the new Oracle Business Intelligence installation.

## How to copy Discoverer connections from one Oracle Business Intelligence installation to another

You copy Discoverer connections from one Oracle Business Intelligence installation to another using the ssomig script.

To copy Discoverer connections from one Oracle Business Intelligence installation to another:

1. On the source Oracle Business Intelligence installation, export the ORASSO schema using the ssomig script (for more information, see ["How to export Discoverer connections"](#)).
2. On the target Oracle Business Intelligence installation, import the ORASSO schema using the ssomig script (for more information, see ["How to import Discoverer connections"](#)).

### Notes

- For more information about the ssomig script, see *Oracle Application Server Single Sign-On Administrator's Guide*.

## How to obtain the ORASSO login password

To run ssomig commands you need the ORASSO login password. If you do not know the ORASSO login password, use the ldapsearch command to obtain the ORASSO login password.

To obtain the ORASSO login password:

1. At a command prompt, enter the ldapsearch command for obtaining the ORASSO login password using the following syntax:

```
ldapsearch -h directory_host_name -p directory_port -D
directory_bind_dn -w directory_bind_dn_password -b
"orclReferenceName=infrastructure_database"
"orclresourcename=ORASSO" orclpasswordattribute
```

For more information about the ldapsearch command, see *Oracle Internet Directory Administrator's Guide*.

## How to export Discoverer connections

You export Discoverer connections to enable you to copy them from one Oracle Business Intelligence installation to another.

To export Discoverer connections:

1. On the target Oracle Business Intelligence installation, run the following command at the command prompt:

```
<ORACLE_HOME>/sso/bin/ssomig -s ORASSO -p <orasso_password>
-c <src_tns_alias> -export
```

Where:

- <orasso\_password> is the ORASSO login password. For more information about obtaining the ORASSO login password, see ["How to obtain the ORASSO login password"](#).
- <src\_tns\_alias> is the net service name for the OracleAS Single Sign-On database.

For example:

```
<ORACLE_HOME>/sso/bin/ssomig -s ORASSO -p Ov0aR19T -c
portalsrc -export
```

You have now exported the Discoverer connections from the source Oracle Business Intelligence installation. The next step is to import the Discoverer connections into the target Oracle Business Intelligence installation (for more information, see ["How to import Discoverer connections"](#)).

## How to import Discoverer connections

You import Discoverer connections to enable you to copy them from one Oracle Business Intelligence installation to another.

To export Discoverer connections:

1. On the target Oracle Business Intelligence installation, run the following command at the command prompt:

```
<ORACLE_HOME>/sso/bin/ssomig -s ORASSO -p <orasso_password>
-c <dst_tns_alias> -import -merge -discoforce
```

Where:

- <orasso\_password> is the ORASSO login password. For more information about obtaining the ORASSO login password, see ["How to obtain the ORASSO login password"](#).

For example:

```
<ORACLE_HOME>/sso/bin/ssomig -s ORASSO -p F9qX233h -c  
portalsrc -import -merge -discoforce
```

You have now imported the Discoverer connections into the target Oracle Business Intelligence installation. You can now copy Discoverer portlets to the target Oracle Business Intelligence installation (for more information, see ["How to copy Discoverer portlets from one Oracle Business Intelligence installation to another"](#)).

---

## Authoring OracleAS Portal Pages with Discoverer Portlets

This chapter explains how to author OracleAS Portal pages with Discoverer Portlets, and contains the following topics:

- "Pre-requisites for publishing Discoverer worksheets in OracleAS Portal"
- "How to connect to OracleAS Portal and display the Add Portlets page"
- "How to add a Discoverer List of Worksheets portlet to an OracleAS Portal page"
- "How to add a Discoverer Worksheet portlet to an OracleAS Portal page"
- "How to add a Discoverer Gauges portlet to an OracleAS Portal page"
- "How to edit a Discoverer portlet"
- "How to customize a Discoverer portlet using Discoverer Portlet Provider"
- "How to customize the Discoverer worksheet shown in a portlet in Viewer, using the Analyze link"
- "Notes about resizing graphs in Discoverer Worksheet portlets"
- "Notes about using worksheet parameters in Discoverer portlets"
- "How to map worksheet parameters to Page Parameters in OracleAS Portal"
- "How to add Simple Parameter Form portlets to an OracleAS Portal page"
- "Notes about publishing Discoverer content in portlets"
- "About choosing database connections for Discoverer portlets"
- "About choosing refresh options for Discoverer portlets"
- "About Discoverer connections and OracleAS Single Sign-On"

### Pre-requisites for publishing Discoverer worksheets in OracleAS Portal

Before you can publish Discoverer content in OracleAS Portal you need:

- Discoverer Portlet Provider to be registered in OracleAS Portal (for more information, see [Chapter 2, "Setting up Discoverer Portlet Provider in OracleAS Portal"](#)).
- OracleAS Portal log in details (i.e. Single Sign-On user details)
- privileges to create, edit, and customize pages in OracleAS Portal

- access to a public Discoverer connection created by the Discoverer manager or a private Discoverer connection created while you were logged in as a Single Sign-On user
- one or more worksheets created in Discoverer Plus Relational, Discoverer Plus OLAP, or Discoverer Desktop

**Note:** If you want to create a Discoverer Gauges portlet, you must use a crosstab worksheet.

### Notes

- Contact the OracleAS Portal administrator if you do not have the privileges to create, edit, or customize pages.
- Private Discoverer connections created in a non-Single Sign-On environment are not available in Discoverer Portlet Provider. To use a private connection to publish Discoverer data in a Discoverer portlet, Single Sign-On must be enabled in Oracle Application Server (for more information, contact the Oracle application server administrator).

To add a Discoverer portlet to an OracleAS Portal page, you:

- use the Add Portlets page to add an undefined portlet with default settings to the OracleAS Portal page
- use the Edit Defaults page to edit the default settings of the portlet to suit your needs, and make the portlet ready for use

Having created a Discoverer Portlet, you can subsequently modify it in two ways:

- by editing defaults

When you use the Edit Defaults option, the changes that you make are visible to all users of an OracleAS Portal page (for more information, see ["How to edit a Discoverer portlet"](#)).

- by customizing

When you use the Customize option, the changes that you make are only visible to you (for more information, see ["How to customize a Discoverer portlet using Discoverer Portlet Provider"](#)).

### Notes

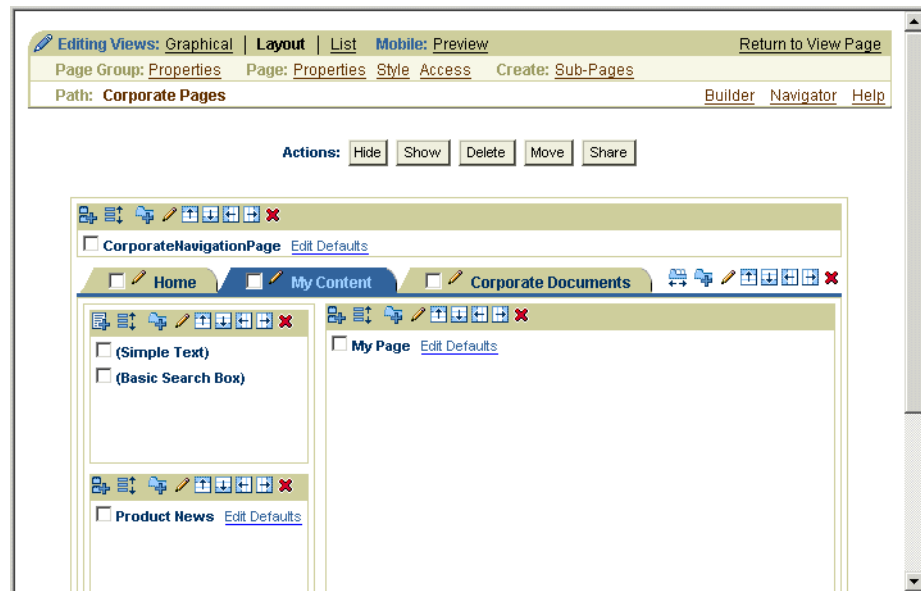
- Refer to the OracleAS Portal Online Help for more information about using the OracleAS Portal toolbars and wizards.

## How to connect to OracleAS Portal and display the Add Portlets page

You connect to OracleAS Portal and display the Add Portlets page when you want to add a portlet (e.g. a Discoverer Worksheet portlet) to an OracleAS Portal page.

To connect to OracleAS Portal and display the Add Portlets page:

1. Start an Internet browser.
2. Display the OracleAS Portal page to which you want to add a Discoverer portlet.
3. If you are not already logged in, click Login and enter your OracleAS Portal login details (i.e. your Single Sign-On details).
4. Click **Edit** to display the Edit Views page.
5. Select the **Editing Views: Layout** link at the top of the page.

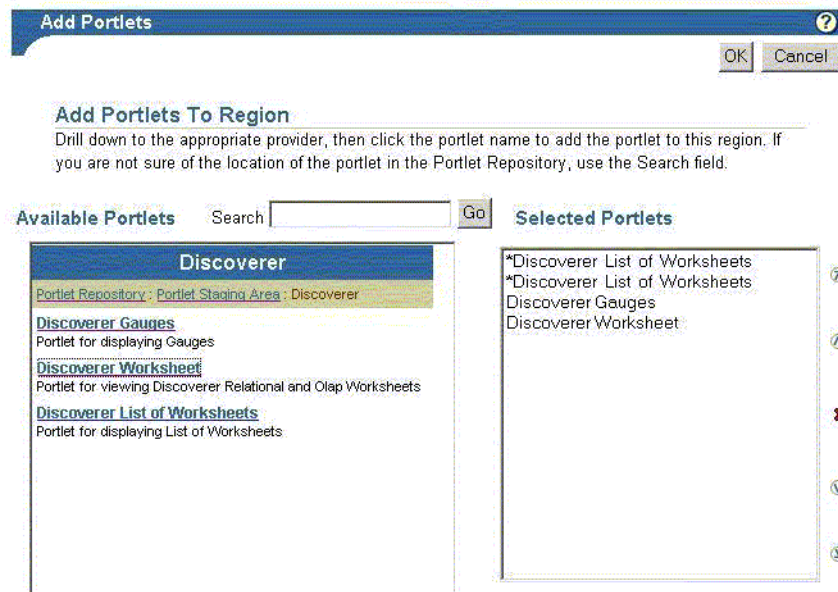


6. Click the **Add Portlets** icon in a region to display the Add Portlets page.

To add portlets, you move portlets from the **Available Portlets** list to the **Selected Portlets** list.

7. In the **Available Portlets** area, select Discoverer Portlet Provider or navigate to where the Discoverer Portlet Provider is located and select it.

**Hint:** If you have recently installed Oracle Application Server and/or Oracle Business Intelligence, the Discoverer portlets might be in the Portlet Staging Area folder. If you cannot find the Discoverer Portlet Provider, contact the Discoverer manager or OracleAS Portal administrator.



The three Discoverer portlet types (Discoverer Worksheet, Discoverer List of Worksheets, and Discoverer Gauges) are displayed in the Available Portlets area.

8. Click the Discoverer portlets you wish to add to the Selected Portlets list.

9. (Optional) Use the up and down arrows to change the order of the portlets in the Selected Portlets list.
10. Click OK.

## How to add a Discoverer List of Worksheets portlet to an OracleAS Portal page

You add a List of Worksheets portlet to an OracleAS Portal page when you want to provide Discoverer worksheet links in OracleAS Portal. For example, you might want to publish a link for sales worksheets to colleagues in a sales department.

For more information, see ["About the Discoverer List of Worksheets portlet"](#).

To add a Discoverer List of Worksheets portlet:

1. Connect to OracleAS Portal and display the Add Portlets page (for more information, see ["How to connect to OracleAS Portal and display the Add Portlets page"](#)).
2. Select the **Discoverer List of Worksheets** link to add the portlet to the **Selected Portlets** list.
3. Click OK to close the Add Portlets page.
4. Select the **Edit Defaults** link next to the portlet that you have just added to start the portlet wizard.

5. Use the Database Connections page to specify how OracleAS Portal users can access the portlet (for more information, see ["About choosing database connections for Discoverer portlets"](#)).
6. Use the List of Worksheets page to select the worksheets to display in the portlet.
7. Use the Refresh Options page to specify when the workbook list is refreshed.
8. Use the Portlet Options page to specify the portlet name, the order of worksheets, and the maximum number of worksheets to display.

For example, you might want to display a maximum of ten worksheets in alphabetical order.



9. Use the Review Portlet Defaults page to check that you have selected the correct portlet options.
10. Click **Finish** to save the defaults.

You can now view the Discoverer list of worksheets portlet. It might take a few minutes for the portlet to retrieve its content for the first time.

## How to add a Discoverer Worksheet portlet to an OracleAS Portal page

You add a Worksheet portlet when you want to add Discoverer worksheet data to a page in OracleAS Portal. For example, you might want to publish a sales report to colleagues in a sales department.

For more information, see "[About the Discoverer Worksheet portlet](#)".

To add a Discoverer Worksheet portlet:

1. Connect to OracleAS Portal and display the Add Portlets page (for more information, see "[How to connect to OracleAS Portal and display the Add Portlets page](#)").
2. Select the **Discoverer Worksheet Portlet** link to add a portlet to the **Selected Portlets** list.
3. Click OK to close the Add Portlets page.
4. Select the **Edit Defaults** link next to the portlet that you have just added to start the portlet wizard.



5. Use the Database Connections page to specify how OracleAS Portal users can access the portlet (for more information, see "[About choosing database connections for Discoverer portlets](#)").
6. Use the Worksheet page to select the worksheet to display in the portlet.
7. (optional) If parameters are defined for the worksheet, use the Edit Parameters page to specify parameter values.

Parameter values provide dynamic input to worksheets. For example, to focus on specific information, or to provide input to calculations (for more information about parameters, see the *Oracle Business Intelligence Discoverer Plus User's Guide*).

**Note:** The Edit Parameters page is not displayed if you are publishing a worksheet containing OLAP data.

8. Use the Portlet Options page to specify the parts of the worksheet to publish.  
For example, you might want to publish the worksheet data only, the worksheets graph only, or both the worksheet data and the worksheet's graph.
9. Use the Refresh Options page to specify when the worksheet data is refreshed.
10. Use the Review Portlet Defaults page to check that you have selected the correct portlet options.
11. Click **Finish** to save the defaults.

You can now view the Discoverer worksheet in the portlet. It might take a few minutes for the portlet to retrieve its content for the first time.

## How to add a Discoverer Gauges portlet to an OracleAS Portal page

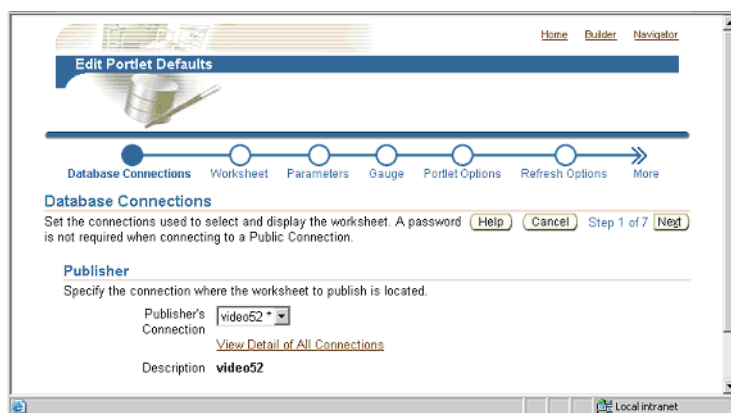
You add a Discoverer Gauges portlet when you want to display Discoverer worksheet data as gauges in a page in OracleAS Portal. For example, you might want to create a management dashboard that monitors key performance indicators.

**Note:** To create a Discoverer Gauges portlet, you must use a crosstab worksheet.

For more information, see ["About the Discoverer Gauges portlet"](#).

To add a Discoverer Gauges portlet:

1. Connect to OracleAS Portal and display the Add Portlets page (for more information, see ["How to connect to OracleAS Portal and display the Add Portlets page"](#)).
2. Select the **Discoverer Gauges Portlet** link to add a portlet to the **Selected Portlets** list.
3. Click OK to close the Add Portlets page.
4. Select the **Edit Defaults** link next to the portlet that you have just added to start the portlet wizard.



5. Use the Database Connections page to specify how OracleAS Portal users can access the portlet (for more information, see ["About choosing database connections for Discoverer portlets"](#)).
6. Use the Worksheet page to select the worksheet to display in the portlet.

**Note:** If you are creating a Discoverer Gauges portlet, the Worksheet page only displays crosstab worksheets. You cannot create a Discoverer Gauges portlet based on a table worksheet.

7. (optional) If parameters are defined for the worksheet, use the Edit Parameters page to specify parameter values.

Parameter values provide dynamic input to worksheets. For example, to focus on specific information, or to provide input to calculations (for more information about parameters, see the *Oracle Business Intelligence Discoverer Plus User's Guide*).

**Note:** The Edit Parameters page is not displayed if you are publishing a worksheet containing OLAP data.

8. Use the Gauge page to specify the rows and columns to publish, and specify threshold values for the gauges.
9. Use the Portlet Options page to specify the parts of the worksheet to publish.  
For example, you might want to publish the worksheet data only, the worksheet's graph only, or worksheet data and a worksheet's graph.
10. Use the Refresh Options page to specify when the worksheet data is refreshed.
11. Use the Review Portlet Defaults page to check that you have selected the correct portlet options.
12. Click **Finish** to save the defaults.

You can now view the Discoverer Gauges portlet. It might take a few minutes for the portlet to retrieve its content for the first time.

## How to edit a Discoverer portlet

You edit a Discoverer portlet when you want to change how a portlet is displayed to OracleAS Portal users. For example, you might want to display a different worksheet in a Discoverer Gauges portlet.

To edit a Discoverer portlet:

1. Start an Internet browser.
2. Display the OracleAS Portal page containing the Discoverer portlet that you want to edit.
3. If you are not already logged in, click Login and enter your OracleAS Portal login details (i.e. your Single Sign-On details).
4. Click **Edit** to display the page in edit mode.
5. Select the **Layout** link from the Editing Views area at the top of the page.
6. Select the **Edit Defaults** link next to the portlet that you want to edit to display the Edit Defaults page.

For example, for a Discoverer Worksheet portlet, the Edit Worksheet Portlet Defaults page is displayed.

**Edit Portlet Defaults**

**Edit Worksheet Portlet Defaults** [Cancel] [Done]

**Database Connections**  
These are the connections used to select and display the worksheet. [Update]

Publisher	Video Store - Analytics
Users Logged In	(Publisher's Connection)
Users Not Logged In	Allow users to change database connection
	No Connection (Do not display data)

**Worksheet**  
This is the Worksheet displayed in the Worksheets portlet. [Update]

Worksheet	Crosstab Layout
Workbook	Video Tutorial Workbook
Description	
Type	
Owner	
Last Modified	

**Portlet Options**  
These are the portlet options. [Update]

Portlet Title	Video Tutorial Workbook - Crosstab Layout
Content Display Options	Graph
	Table/Crosstab
	Worksheet Title
	Worksheet Text
Allow analyze the worksheet in Viewer	Yes
Launch Worksheet Viewer	Launch Worksheet Viewer in the same window
Allow saving changes made in Viewer	Yes

**Refresh Options**  
These are the refresh options. [Update]

First Refresh Time	08:27
First Refresh Date	01/29/2004
Refresh Frequency	Never repeat

[Cancel] [Done]

7. Use the Update buttons on the Edit Portlet Defaults page to change the portlet settings as required.

For example, to update the portlet options, click Update in the Portlet Options area to display the Portlet Options page and make changes.

8. Click **Done** to save your changes.

You can now view the updated Discoverer portlet.

## How to customize a Discoverer portlet using Discoverer Portlet Provider

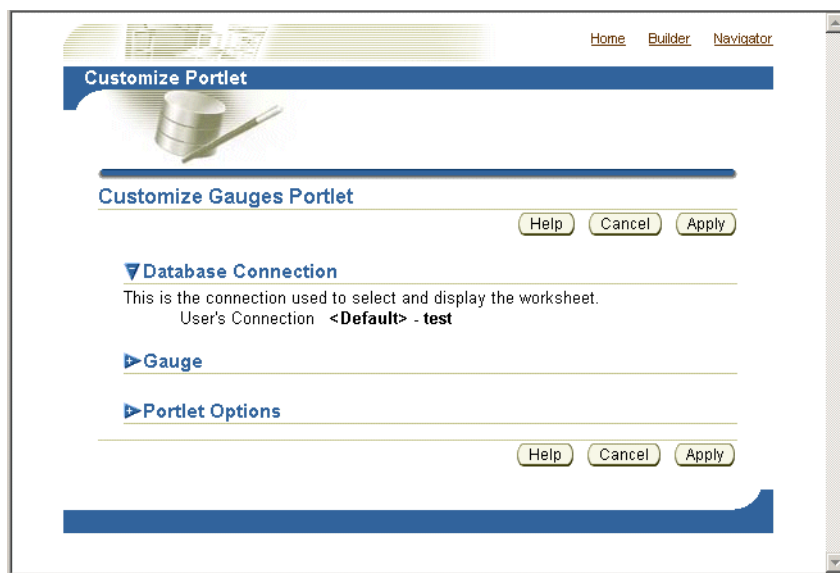
You customize a Discoverer portlet when you want to make changes that are only visible to you, not to other OracleAS Portal users. For example, you might want to apply a spotlight format to a Discoverer Worksheet portlet.

For more information about the different customizations you can make in Discoverer Portlet Provider and Discoverer Viewer, see ["About using OracleAS Portal as a personalization framework for Discoverer"](#).

To customize a Discoverer portlet using Discoverer Portlet Provider:

1. Start an Internet browser.
2. Display the OracleAS Portal page containing the Discoverer portlet that you want to edit.
3. If you are not already logged in, click **Login** and enter your OracleAS Portal login details (i.e. your Single Sign-On details).
4. Click **Customize** to display the appropriate Customize Portlet page for the Discoverer portlet you selected.

For example, for a Discoverer Gauges portlet, the Customize Gauges portlet page is displayed.



5. Use the Customize Portlet page to make the required changes to the portlet.
6. Click **Apply** to save customizations to the portlet.

You can now view the updated Discoverer portlet. Customization changes that you make are only visible to you, not to other OracleAS Portal users.

## How to customize the Discoverer worksheet shown in a portlet in Viewer, using the Analyze link

You typically customize the Discoverer worksheet shown in a portlet to change its layout or create a personalized view of it.

For more information about the different customizations you can do in Discoverer Portlet Provider and Discoverer Viewer, see "[About using OracleAS Portal as a personalization framework for Discoverer](#)".

**Note:** You can choose not to allow users to analyze in Discoverer Viewer, or not to allow users to save their changes back from Discoverer Viewer, by using settings in the Portlet Options page (displayed using the Edit Defaults link).

To customize the Discoverer worksheet shown in a portlet in Viewer, using the Analyze link:

1. Start an Internet browser.
2. Display the OracleAS Portal page containing the Discoverer portlet that you want to edit.
3. If you are not already logged in, click Login and enter your OracleAS Portal login details (i.e. your Single Sign-On details).
4. Select the Analyze link to display the worksheet in Discoverer Viewer.
5. Make changes to the worksheet in Discoverer Viewer.
6. Select the **Save and return to Portal** link.

**Hint:** The **Save and return to Portal** link is only displayed if you have the necessary privileges to save changes. If you do not have the necessary privileges, only the **Cancel and return to Portal** link is displayed. If you require privileges, contact the portlet publisher.

You can now view the updated Discoverer worksheet in the portlet.

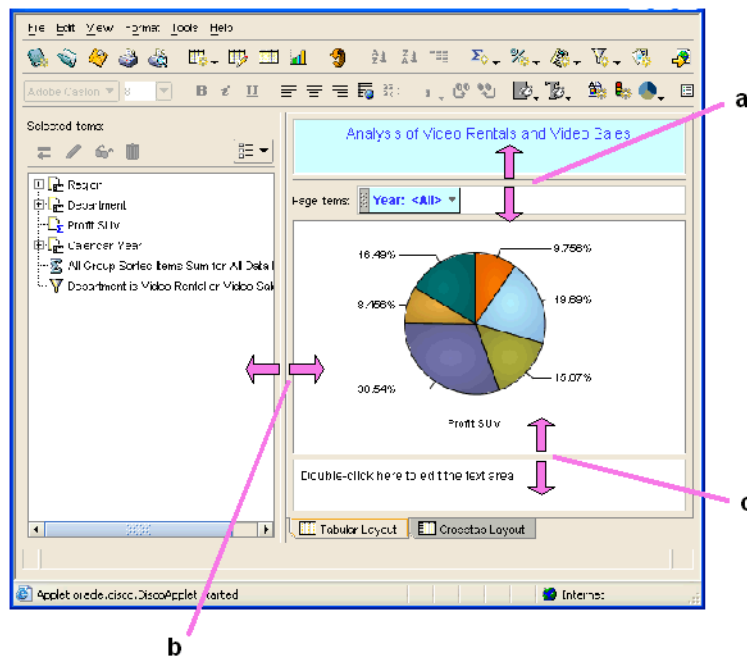
## Notes about resizing graphs in Discoverer Worksheet portlets

When you publish a worksheet containing a graph in a Discoverer Worksheet portlet, you might find that the graph is too large and uses too much of the OracleAS Portal display area. If a graph is too large, you can resize it in any of the following ways:

- In OracleBI Discoverer Plus, edit the source worksheet and resize the graph, then save the worksheet.

The graph size that you specify in OracleBI Discoverer Plus is also applied for all users in OracleBI Discoverer Viewer and OracleAS Portal.

To resize a graph in OracleBI Discoverer Plus, drag the dividers surrounding the graph pane to change the size of the graph pane. Discoverer automatically resizes the graph to fit the graph pane. For example, in the example below you might drag the left-hand divider to the right to make the graph smaller.



Key to figure:

- a. The top divider used to increase or decrease the height of the graph pane from the top.
- b. The left-hand divider used to increase or decrease the width of the graph pane.
- c. The bottom divider used to increase or decrease the height of the graph pane from the bottom.

- In OracleAS Portal, customize the portlet and resize the graph, then save the changes.

The graph size that you specify in OracleAS Portal is applied in OracleAS Portal, but not for other OracleAS Portal users. The source worksheet is not changed.

To resize a graph in OracleAS Portal, select the **Customize** link in a portlet, display the Graph Settings page and use the **Height** and **Width** fields to resize the graph.

**Customize Portlet**

**Graph Settings**  
Select the formatting properties. Help Cancel Continue

**Tools** **Graph**

Type Pie Pie Go Width 556 Height 292 Go ☐ 3D Effect ☒ Gradient

16.49% 9.756% 19.69% 15.07% 30.54% 8.456%

Profit SUM

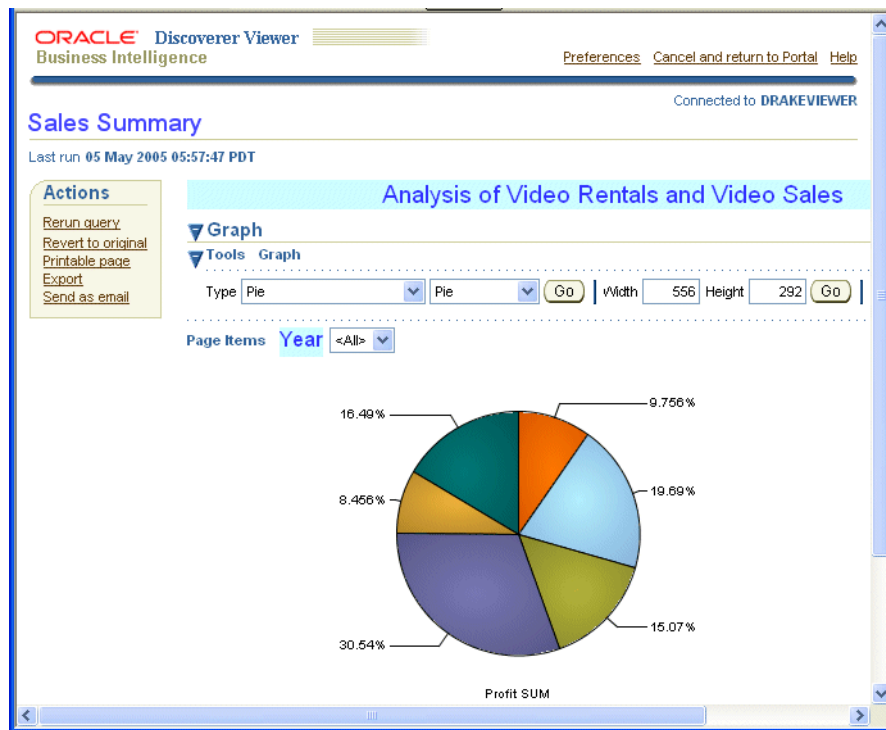
Help Cancel Continue

For more information about customizing worksheet portlets, see "[How to customize a Discoverer portlet using Discoverer Portlet Provider](#)".

- In OracleBI Discoverer Viewer invoked from within OracleAS Portal (i.e. you select the **Analyze** link below a Discoverer portlet), customize the worksheet and resize the graph, then save the changes.

The graph size that you specify in OracleBI Discoverer Viewer is applied in OracleBI Discoverer Viewer for end users using the current connection, but not for other connections. The source worksheet is not changed.

To resize a graph in OracleBI Discoverer Viewer, you select the **Analyze** link below a Discoverer portlet, select the **Graph** link, and use the **Height** and **Width** fields to resize the graph.



For more information about customizing a worksheet in OracleBI Discoverer Viewer, see ["How to customize the Discoverer worksheet shown in a portlet in Viewer, using the Analyze link"](#).

### Notes

- Customizations made in OracleAS Portal override worksheet settings saved in OracleBI Discoverer Plus.
- If you resize a graph in OracleBI Discoverer Plus, to display the resized graph in OracleAS Portal you must refresh the Discoverer portlets that display that worksheet.

## Notes about using worksheet parameters in Discoverer portlets

If you create Discoverer portlets that contain worksheet parameters, you can map the worksheet parameters to OracleAS Portal Page Parameters and create a Simple Parameter Form portlet. This enables a portlet user to easily specify a parameter value for a page level parameter to update many different Discoverer portlets at the same time. To accomplish this you:

- map the Discoverer worksheet parameter to a Generic (e.g. Discoverer portlet) Page Parameter (for more information, see ["How to map worksheet parameters to Generic Page Parameters"](#))
- create an OracleAS Portal Page Parameter (for more information, see ["How to create a Page Parameter"](#))
- map the OracleAS Portal Page Parameter to the Generic Page Parameter (for more information, see ["How to map a Generic Page Parameter to a Page Parameter"](#))
- add a Simple Parameter Form portlet to the OracleAS Portal page containing the Discoverer portlets (for more information, see ["How to add Simple Parameter Form portlets to an OracleAS Portal page"](#))



For example, you could create three Discoverer portlets, each one containing a worksheet with a parameter called City\_WS\_param. While editing the defaults of each portlet, you map City\_WS\_param to a generic Discoverer portlet parameter, say DiscoParameter1. Make a note of each generic Discoverer portlet parameter and which worksheet parameters they map to so that you can correctly set up the OracleAS Portal page parameters.

When you get all three portlets on an OracleAS Portal page, click the Edit button and select the Page: Properties link. Display the Parameters tab of the Edit Page screen. If there is no suitable page parameter available, add a new page parameter called City\_Page\_Param. In the Page Parameter Properties section, you will probably want to make the parameter Customizable and may optionally set the Display Name, Default Value and Description. In the Portlet Parameter Values section, for each appropriate portlet, map DiscoParameter1 to use Page Parameter City\_Page\_Param.

**Note:** You can map parameters in both Worksheet portlets and Gauges portlets. In other words, you can update both Gauges portlets and Worksheet portlets at the same time with a single parameter value.

You can also enable users to easily set page level parameter values by adding one or more Simple Parameter Form portlets to the portal page. Portlet users can then specify a parameter value in a Simple Parameter Form portlet to update many Discoverer portlets at the same time (for more information, see ["How to add Simple Parameter Form portlets to an OracleAS Portal page"](#)).

For more information about mapping worksheet parameters to portal page level parameters, see ["How to map worksheet parameters to Page Parameters in OracleAS Portal"](#).

#### Notes

- If the worksheet parameter must be entered as an index value rather than an actual value (e.g. the end user must enter the value 3 instead of the value March), the end user must specify the index value in single quotation marks (e.g. '3').

## How to map worksheet parameters to Page Parameters in OracleAS Portal

You map worksheet parameters to Page Parameters in OracleAS Portal to enable portlet users to specify a Page Parameter value that updates many Discoverer portlets at the same time. For example, when a portlet user chooses January as a Page Parameter value, you might want three Discoverer worksheets to be refreshed with data for January.

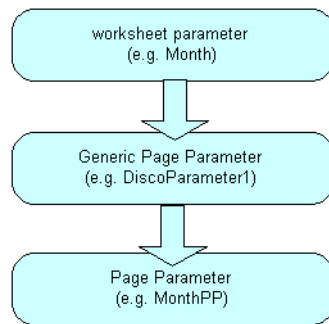
To map a worksheet parameter to a Page Parameter you:

- map a worksheet parameter to one of the Generic Page Parameters
- map the Generic Page Parameter to a portal Page Parameter

Discoverer provides ten default Generic Page Parameters called DiscoParameter1, DiscoParameter2, DiscoParameter3, and so on through to DiscoParameter10.

The figure below shows the process of mapping worksheet parameters to Page Parameters.

**Figure 3–1 Mapping a worksheet parameter to a Page Parameter in Oracle Portal**



To map Discoverer worksheet parameters to portal Page Parameters:

1. For each Discoverer portlet, map a worksheet parameter to a Generic Page Parameter (for more information, see ["How to map worksheet parameters to Generic Page Parameters"](#)).  
  
For example, you might map a worksheet parameter called Month to a Generic Page Parameter called DiscoParameter1.
2. (optional) If you have not already created a Page Parameter in the OracleAS Portal page you want to edit, create a Page Parameter (for more information, see ["How to create a Page Parameter"](#)).  
  
For example, you might create a Page Parameter in OracleAS Portal called MonthPP.
3. Map a Generic Page Parameter to a Page Parameter for each Discoverer portlet on an OracleAS Portal page (for more information, see ["How to map a Generic Page Parameter to a Page Parameter"](#)).  
  
For example, you might map DiscoParameter1 to MonthPP.

## How to map worksheet parameters to Generic Page Parameters

You map a worksheet parameter to Generic Page Parameters to enable you to later map the Generic Page Parameter to a Page Parameter in OracleAS Portal.

To map a worksheet parameter to a Generic Page Parameter:

1. Start an Internet browser.
2. Display the page containing the Discoverer portlet that you want to edit.
3. If you are not already logged in, click Login and enter your portal login details (i.e. your Single Sign-On details).
4. Create a new Discoverer Worksheet portlet or Gauges portlet (or edit an existing portlet) and navigate to the Parameters page, as follows:
  - If you are creating a new portlet, add a new Discoverer Worksheet portlet or Gauges portlet and navigate to the Parameters page.  
  
For more information, see ["How to add a Discoverer Worksheet portlet to an OracleAS Portal page"](#) or ["How to add a Discoverer Gauges portlet to an OracleAS Portal page"](#).
  - If you are editing an existing portlet, select the Edit Defaults link next to the portlet to edit, and navigate to the Parameters page.  
  
For more information, see ["How to edit a Discoverer portlet"](#).

Oracle Portal displays the Parameters page.

**Edit Portlet Defaults**

Database Connections Worksheet **Parameters** Portlet Options Refresh Options More

**Parameter Values**

Select default parameter values. [Help](#) [Cancel](#) [Back](#) [Step 3 of 6](#) [Next](#)

Select values for the following parameters.  
\* Indicates required field

Select one or more values for Calendar Month:

(Example: Nov)

☒ Allow logged in users to customize parameter values.

**Page Parameters Mapping**

To map parameters for this portlet to page parameters, you must map the specific worksheet parameters to generic Discoverer portlet parameters. The generic portlet parameters then need to be mapped to Portal Page Parameters.

Parameter	Generic Portlet Parameter
Month	DiscoParameter1

[Help](#) [Cancel](#) [Back](#) [Step 3 of 7](#) [Next](#)

5. Use the **Generic Page Parameter** drop down list next to a worksheet parameter in the **Parameter** column to map that worksheet parameter to one of the Generic Page Parameters provided by Discoverer (e.g. DiscoParameter1).

For example, to map a worksheet parameter called Month to DiscoParameter1, select DiscoParameter1 from the **Generic Page Parameter** drop down list.

6. Save changes to the portlet.

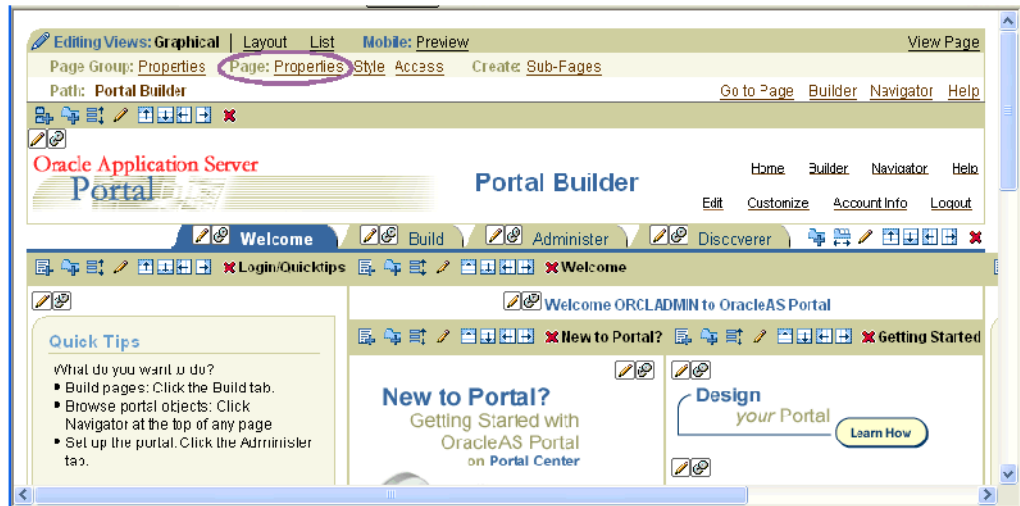
Having mapped a worksheet parameter to a Generic Page Parameter, you must map the Generic Page Parameter to a Page Parameter in OracleAS Portal (for more information, see [How to map a Generic Page Parameter to a Page Parameter](#)).

## How to create a Page Parameter

You create a Page Parameter to enable portlet users to specify a Page Parameter value that updates many Discoverer portlets at the same time.

To create a Page Parameter:

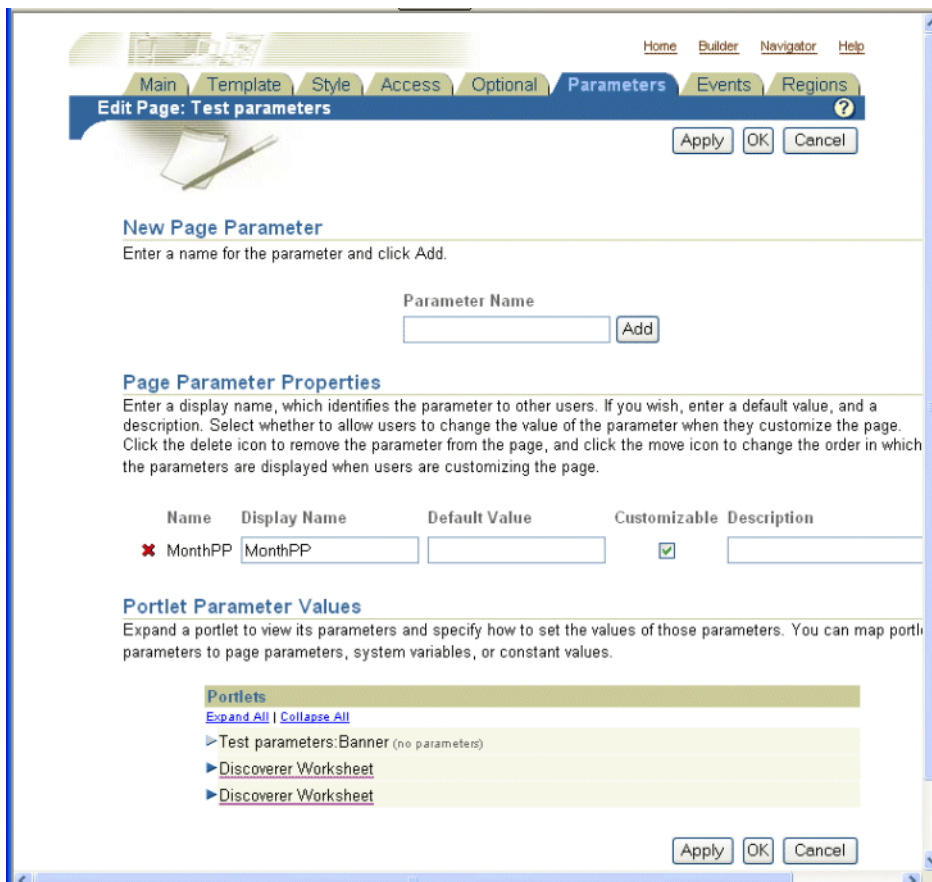
1. Start an Internet browser.
2. Display the OracleAS Portal page containing the Discoverer portlet that you want to edit.
3. If you are not already logged in, click Login and enter your OracleAS Portal login details (i.e. your Single Sign-On details).



4. Select the **Properties** link in the **Page** area to display the Edit Page dialog.
5. Display the Parameters tab.
6. Enter a name for the Page Parameter in the **New Parameter** field and click Add.

**Hint:** The name should be a short unique string with no spaces or separating characters (e.g. MonthPP).

The page parameter that you created is added to the list in the **Page Parameter Properties** area.



- Click OK to save the page properties.

You can now map Generic Page Parameters to the new Page parameter (for more information, see ["How to map a Generic Page Parameter to a Page Parameter"](#)).

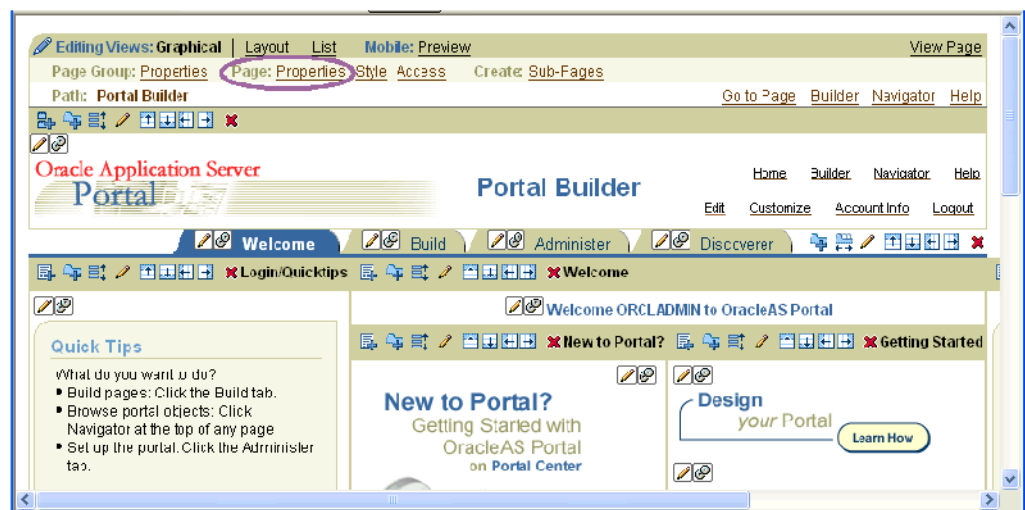
## How to map a Generic Page Parameter to a Page Parameter

You map a Generic Page Parameter to a Page Parameter to enable portlet users to specify a Page Parameter value that updates many Discoverer portlets at the same time.

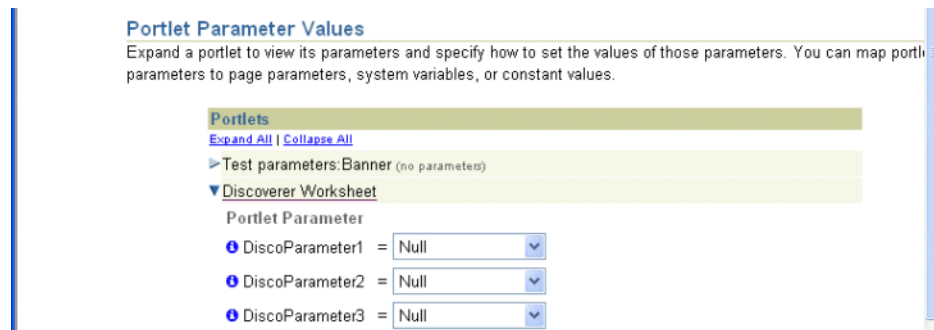
**Hint:** Before you can map a Page Parameter to a Generic Page Parameter, you must first map a worksheet parameter to a Generic Page Parameter (for more information, see ["How to map worksheet parameters to Page Parameters in OracleAS Portal"](#)) and create a Page Parameter if one is not available (for more information, see ["How to create a Page Parameter"](#)).

To map a Generic Page Parameter to a Page Parameter:

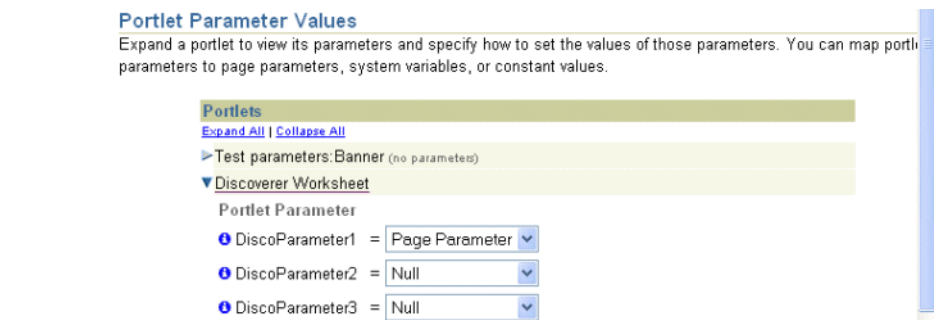
- Start an Internet browser.
- Display the OracleAS Portal page containing the Discoverer portlet that you want to edit.
- If you are not already logged in, click Login and enter your OracleAS Portal login details (i.e. your Single Sign-On details).



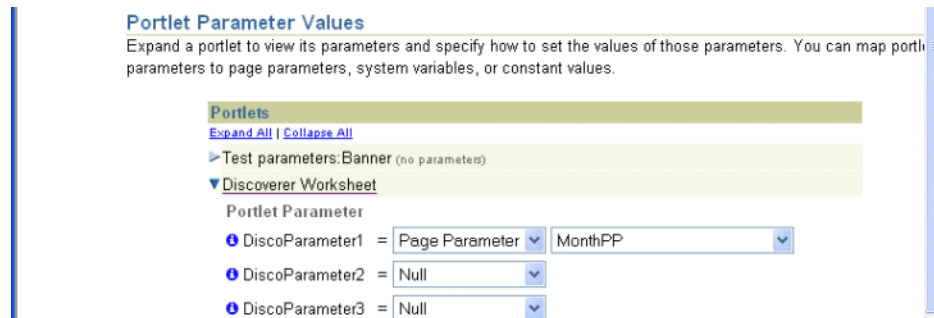
- Select the **Properties** link in the **Page** area to display the Edit Page dialog.
- Display the Parameters tab.
- In the Portlets table in the Portlet Parameter Values area, click on a portlet name (e.g. Discoverer Worksheet) to display the list of Generic Page Parameters (e.g. DiscoParameter1, DiscoParameter2).



7. Select Page Parameter from the drop down list next to the Generic Page Parameter to which you want to map the Page Parameter.



8. Select the Page Parameter (e.g. MonthPP) from the second drop down list that is displayed when you select Page Parameter in the previous step.



9. Click OK to save the page properties.

Oracle Portal refreshes the portal page.

You can now create a Simple Parameter Form portlet to enable portlet users to specify a Page Parameter value that will update many different Discoverer portlets at the same time (for more information, see ["How to add Simple Parameter Form portlets to an OracleAS Portal page"](#)).

**Note:** An alternative (but more time consuming) method for portlet users to specify a Page Parameter value that updates many Discoverer portlets is as follows:

- a. Select the Customize link to display the Customize Page page.
- b. Display the Parameters tab.
- c. In the Page Parameter Values area, use the **Value** field next to a Page Parameters to specify a parameter value.

For example, you might enter January if you want Discoverer worksheet portlets to be refreshed with data for January.

- d. Click OK to save the changes.

The Page Parameter value that you specified is applied to Discoverer portlets in that page.

## How to add Simple Parameter Form portlets to an OracleAS Portal page

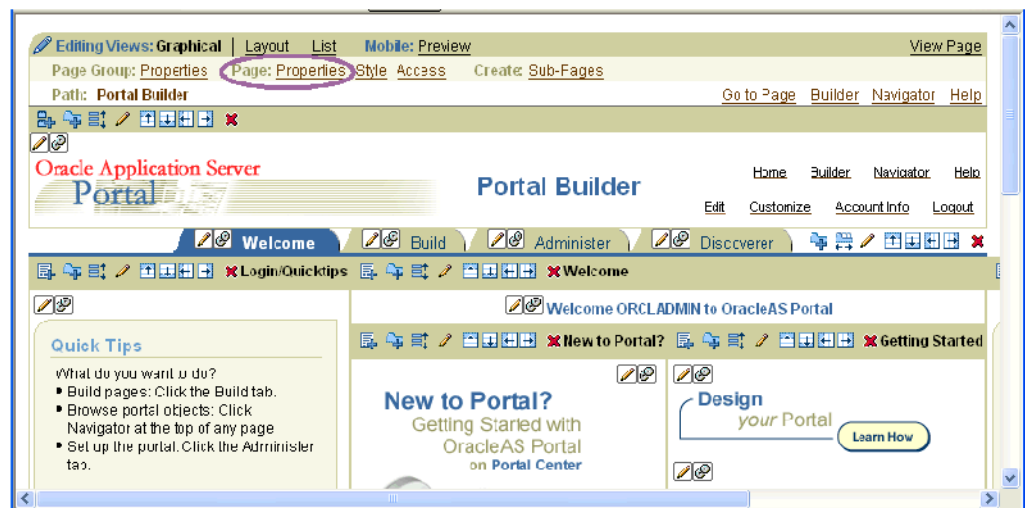
You add a Simple Parameter Form portlet to an OracleAS Portal page to enable users to easily apply a parameter value to update the data displayed in one or more Discoverer portlets.

Before you can create a Simple Parameter Form portlet you must first:

- map a worksheet parameter to a Generic Page Parameter (for more information, see ["How to map worksheet parameters to Page Parameters in OracleAS Portal"](#))
- create a Page Parameter if one is not available (for more information, ["How to create a Page Parameter"](#))
- map a Generic Page Parameter to a Page Parameter (for more information, see ["How to map a Generic Page Parameter to a Page Parameter"](#))

To add a Simple Parameter Form portlet to an OracleAS Portal page:

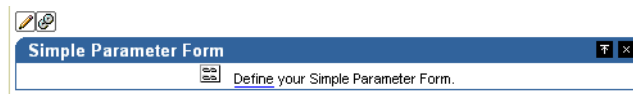
1. Start an Internet browser.
2. Display the OracleAS Portal page containing the Discoverer portlets, where you want to add a Simple Parameter Form portlet.
3. If you are not already logged in, click Login and enter your OracleAS Portal login details (i.e. your Single Sign-On details).



4. Select the Add Portlet link to display the Add Portlets page.
5. Select the Portlet Builders link and the Simple Parameter Form link to add a Simple Parameter Form to the list of Selected Portlets.
6. Click OK.

OracleAS Portal displays an undefined Simple Parameter Form portlet.





7. Select the Define link in the undefined Simple Parameter Form.

OracleAS Portal displays the Define your Simple Parameter Form pages where you enter the details required to create a Simple Parameter Form portlet.

For example, you might enter the following information in the Entry Fields area for a Month page parameter.

**Entry Fields**  
Select which parameters to display in the form.

Name	Label	Parameter	Alignment	Display As	Width	List of Values
Field1	Month	Param1	Left	List of Values	20	Jan, Feb, Mar, Apr, May,
Field2	Department	Param2	Left	Hidden	20	

8. Click Finish when you have entered all the appropriate details.
9. OracleAS Portal displays a new Simple Parameter Form.

10. Select the **Properties** link in the **Page** area to display the Edit Page dialog.
11. Create a Page Parameter (e.g. MonthPP) if one is not available (for more information, see ["How to create a Page Parameter"](#)).
12. Map a Generic Page Parameter to a Page Parameter.

You complete this step once for the Simple Parameter Form portlet and once for each Discoverer portlet that you want the Simple Parameter Form to update (for more information, see ["How to map a Generic Page Parameter to a Page Parameter"](#)).

13. Display the Events tab.
14. Select the Submit link under the Simple Parameter Form link.

OracleAS Portal displays an additional area. This area enables you to specify what happens.

15. Click the Browse icon and select the page to which the parameter value is sent when this event is raised (i.e. when a user clicks the Submit button in the Simple Parameter Form).

For example, to specify that a Simple Parameter Form portlet will submit its parameter value to the Discoverer BI Demo page, you would select the **Go to page** radio button (see screenshot below).

When this event is raised:

☒ Go to page:

☐ Redisplay page: Discoverer BI Demo Page

OracleAS Portal displays a Page Input area.

16. Enter appropriate information into the fields that appear in the Page Input area.



For example, to specify that the input from raising the event (i.e. when a user clicks the Submit button in the Simple Parameter Form) is Parameter 1 you would select the following values:

Pass data to input parameters of page **New Discoverer BI Demo Page:**

Page Input

MonthPP =

17. Click OK to apply your changes.

You have now added a Simple Parameter Form portlet to an OracleAS Portal page, enabling users to easily apply a parameter value to update the data displayed in one or more Discoverer portlets.

**Hint:** You can create more Simple Parameter Forms to update other parameter values in Discoverer portlets.

For more information, see:

- *Oracle Application Server Portal Configuration Guide.*
- *Oracle Application Server Portal Help system*

## Notes about publishing Discoverer content in portlets

When creating a Discoverer portlet, you have a large degree of control over what data is displayed. You also have control over when and how frequently the portlet is refreshed. When creating a portlet, you should carefully consider these settings to make sure that they meet your requirements and ensure a good balance between timeliness of data and performance of your system.

The following sections contain information about publishing Discoverer portlets:

- ["About choosing database connections for Discoverer portlets"](#)
- ["About choosing refresh options for Discoverer portlets"](#)
- ["About Discoverer connections and OracleAS Single Sign-On"](#)

## About choosing database connections for Discoverer portlets

When you create a Discoverer portlet (or edit an existing Discoverer portlet), the first step is to select the database connections that will:

- determine the Discoverer content and options displayed in the portlet
- determine the data that is displayed to the portlet user

You select database connections using the Database Connections page (see example screenshots below).

**Figure 3–2 Database Connections page for the Discoverer List of Worksheets portlet**

**Database Connections**

Set the connections used to select and display the list of worksheets. A password is not required when connecting to a Public Connection. [Help](#) [Cancel](#) [Step 1 of 5](#) [Next](#)

**Publisher**

Set this connection to select the list of worksheets.

Publisher's Connection OLAP Connection \*  
[View Detail of All Connections](#)

Description **GUEST User**

**Users Logged In**

Specify how the list of worksheets should be displayed to logged in users.

Connection ☒ Display the same list of worksheets to all logged in users using connection (Publisher's Connection)  
☐ Display a different list of worksheets by allowing users to customize database connection  
☐ Show a default list of worksheets using connection (Publisher's Connection)

**Users Not Logged In**

Specify how the list of worksheets should be displayed to not logged in users.

Connection ☒ Do not display list of worksheets  
☐ Display list of worksheets using (Publisher's Connection)

[Help](#) [Cancel](#) [Step 1 of 5](#) [Next](#)

**Figure 3–3 Database Connections page for the Discoverer Worksheet and Discoverer Gauges portlets**

**Database Connections**

Set the connections used to select and display the worksheet. A password is not required when connecting to a Public Connection. [Help](#) [Cancel](#) [Step 1 of 6](#) [Next](#)

**Publisher**

Specify the connection where the worksheet to publish is located.

Publisher's Connection OLAP Connection \*  
[View Detail of All Connections](#)

Description **GUEST User**

**Users Logged In**

Specify how data should be displayed to logged in users.

Connection ☒ Display same data to all users using connection (Publisher's Connection)  
☐ Display different data using the Publisher's connection  
     Use this option if your data differs based on SSO username. A separate query will be run per user.  
☐ Display different data by allowing users to customize database connection  
     Use this option if your data differs based on database username.  
☐ Show default data using connection (Publisher's Connection)

**Users Not Logged In**

Specify how data should be displayed to not logged in users.

Connection ☒ Do not display data  
☐ Display data using (Publisher's Connection)

[Help](#) [Cancel](#) [Step 1 of 6](#) [Next](#)

The **Publisher's Connection** list displays the names of all Discoverer connections that are available to you as an OracleAS Portal user. Public connections will be indicated by a trailing asterisk '\*'. Private connections that you created while connected to Discoverer as a Single Sign-On user are also displayed.

The Discoverer connection you select in the **Publisher's Connection** field will determine what worksheets or lists of worksheets are available to you in later steps of

the wizard. It will also determine which connections are available to set for data display for other users (Users Logged In to Portal and Users Not Logged In). The list of connections available on the rest of this page is limited to those that have the same database and EUL of the connection you choose for the Publisher's Connection. This helps ensure that users will be able to see the content you choose if you select a connection other than the Publisher's Connection for other users.

You specify how data will be displayed to users when they are logged in to OracleAS Portal in the **Users Logged In** area of this page. You have three choices on how to display the data to these logged-in users.

- You can display the same data to all users using the connection selected in the **Publisher's Connection** field, or select another Discoverer connection from the list.

**Note:** For List of Worksheets portlets this will run only one query for all users, and will show the same data returned by running the single query.

- If the worksheet you are including in the portlet is based on tables in your database that are striped by SSO user, you can select the **Display different data using the Publisher's Connection** option. Choosing this option enables the portlet to use the Publisher's Connection to get access to the worksheet and passes the OracleAS Portal/SSO username to the database to return only data that the logged in, OracleAS Portal/SSO user has access to.

**Note:** For List of Worksheets portlets this will run one query per SSO user.

- If the worksheet you are displaying in the portlet is based on tables in your database that are striped by database user, you can select the **Allow Users to Customize Database Connection** option. Choosing this option enables the user to determine which connection they want to use to get access to the worksheet and the data. In this case the user will only see the worksheet/list of worksheets/gauge if they have access to the published worksheet. You can also optionally select a connection to determine what data will be displayed by default before the user customizes a portlet.

**Note:** For List of Worksheets portlets this will run one query for every SSO user that customizes this portlet.

You specify how data will be displayed to users who do not log in to OracleAS Portal but still have access to the page that contains your portlet. These users are sometimes referred to as Public users. You have two choices for these users, as follows:

- You can choose to not display data.
- You can choose to display data using the Publisher's Connection or one of the other available connections in the list.

**Note:** If you choose connections other than the Publisher's Connection to display data or allow users to choose their own connection, only those connections that have access to the worksheet defined in the portlet will be able to see it. For example, you create a worksheet portlet using worksheet MyWorkbook.sheet1 and choose the Publisher's Connection to be user SCOTT and you allow users to customize their database connection. The user SCOTT has shared the MyWorkbook workbook to user MARY but not to user FRED. When user MARY customizes the portlet to use her connection, she will see the contents of MyWorkbook.sheet1. If user FRED customizes the portlet to use his connection he will get an error stating that he does not have access to the worksheet. For more information about sharing, see *Oracle Business Intelligence Discoverer Plus User's Guide*.

For a Discoverer List of Worksheets portlet, you have two choices on how to display the data to users that are logged in (i.e. in the Users Logged In area on the Database Connections page), as follows:

- You can choose to display the same list of worksheets to all logged in users using a Discoverer connection that you select. If you select this option, all users will see the same list and will not be able to customize this list.
- You can choose to display a different list of worksheets to each logged in user by allowing them to customize their own Discoverer connection. In choosing this option, users might or might not see the list of worksheets that you select, depending on the Discoverer connection that they select.

**Note:** If you want users to be able to customize a Discoverer List of Worksheets portlet to include their own list of worksheets, be sure to select the **Allow users to change selected worksheets** option in the List of Worksheets page.

In the **Users Not Logged In** area of the Database Connections page, you specify how data is displayed to users who have not logged into OracleAS Portal, but who still have access to a page that contains your portlet (i.e. public users). You can choose to either display no data, or display data or worksheets using a Discoverer connection that you specify.

## About choosing refresh options for Discoverer portlets

When you create a Discoverer portlet, you specify how often to refresh the data in the portlet. Each time a portlet is refreshed, it requires at least one Discoverer session on the middle tier machine. If different users are using different connections for viewing the same portlet, a different Discoverer session is required for each user.

The number of portlet instances that OracleAS Portal will refresh is restricted. The maximum number is determined by the Discoverer manager or Oracle administrator (for more information about the number of sessions in the Discoverer Portlet Provider's pool, see the *Oracle Business Intelligence Discoverer Configuration Guide*). If the number of refresh jobs exceeds the number of sessions at any given time, the refresh jobs are queued until a session becomes available.

It is recommended that you select the lowest frequency possible that will still provide your users with data that meets their timeliness requirements. Values for last refresh time and next refresh time are displayed in each portlet so that users will know how recent the data is. If you allow users to analyze the data by selecting an Analyze link, a new query will be run and they will see the current data in Discoverer Viewer.

You can choose to not refresh the portlet, which is the default setting. In this case, the portlet will require a Discoverer session when it is published, when a new user accesses it for the first time, or when a user changes the set of parameter values (only applies to Worksheet or Gauges portlets based on worksheets with parameters). You will not be able to set the refresh schedule of a Discoverer List of Worksheets portlet that contains a static list of worksheets.

As the publisher of a portlet, you can go to the Edit Defaults page of a portlet at any time and select the Refresh Portlet Now option to manually refresh the portlet.

## About Discoverer connections and OracleAS Single Sign-On

Discoverer connections work as follows with OracleAS Single Sign-On:

- if Single Sign-On is enabled, then private connections (created in Discoverer Viewer) will be available for publishing in OracleAS Portal

- if Single Sign-On is not enabled, then only public connections (created in Oracle Application Server Control) will be available for publishing in OracleAS Portal

**Note:** For more information about OracleAS Single Sign-On, see the *Oracle Business Intelligence Discoverer Configuration Guide*.



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## Using Discoverer Portlets in OracleAS Portal

This chapter is about using Discoverer Portlets in OracleAS Portal and contains the following topic:

- ["About using OracleAS Portal as a personalization framework for Discoverer"](#)

### About using OracleAS Portal as a personalization framework for Discoverer

All authenticated/logged in users will be able to customize particular properties of each Discoverer portlet you create. For example, they will be able to change the portlet title and other portlet options and set formatting customizations for a Discoverer Worksheet portlet. You may also allow them to customize additional properties of the portlet such as the database connection used, parameter values, or the list of worksheets.

You can also allow users to analyze the worksheet that is used as the basis for a Discoverer Worksheet or Gauges portlet in the Single Worksheet Viewer. The Single Worksheet Viewer is a special instance of the Discoverer Viewer that is available only through a Discoverer portlet. When a user opens a worksheet from a Discoverer List of Worksheets portlet they also use the Single Worksheet Viewer. The Single Worksheet Viewer will not allow users to change the worksheet they have opened and will not allow them to change the connection used. It is specifically designed to restrict the user to access to one worksheet from a Discoverer portlet.

Note that when an authenticated user launches the Single Worksheet Viewer (whether from an Analyze link in a Worksheet or Gauges portlet or opening a worksheet from a Discoverer List of Worksheets portlet) the SSO username is passed through to the query being executed to return data to Single Worksheet Viewer. In this way, if data differs by Single Sign-On user, the user will only see the data they are supposed to see.

Once in Single Worksheet Viewer, the user will have access to additional customizations and actions that are not available within the portlet customizations page. For example, in the Single Worksheet Viewer the user will be able to change layout by moving or swapping columns and change page item values to change the data displayed. In addition to extended customizations, Single Worksheet Viewer gives the user access to the following actions that are not available directly in the portlet:

- Rerun query
- Revert to original
- Print
- Export

- Send as email

The following table summarizes customizations and specifies whether they are available through the portlet customization page or through the Single Worksheet Viewer.

**Table 4–1 Customizations in Discoverer Portlet Provider and Single Worksheet Viewer**

Customization	Customize Portlet	Analyze Worksheet
Database Connection	Yes	No
Parameter Values	Yes	Yes
Change Page Item Values	No	Yes
Layout	No	Yes
Stoplight Formats	Yes	Yes
Cell Formats	Yes	Yes
Sort (Relational and tabular worksheets only)	No	Yes
Saved Selections (OLAP worksheets only)	No	Yes
Link/Unlink Graph (OLAP worksheets only)	No	Yes
Graph Type	Yes	Yes
Portlet Options - Display Options	Yes	No
Portlet Options - Analyze Options	Yes	No
Portlet Options - Rows and Columns	Yes	No
Rows and Columns	No	Yes

Note: Rows and Columns are a separate setting in the portlet and in Single Worksheet Viewer, which do not affect each other.

You can further allow Discoverer users to save these customizations made in Single Worksheet Viewer for the Worksheet and List of Worksheets Discoverer portlets. By doing this you can create a personalization framework and effectively support hundreds of users with a handful of worksheets. You can allow each OracleAS Portal/SSO user to have their own personalized, custom view of the worksheets they are interested in without the overhead of creating and managing a database account for them or granting them privileges to create and save Discoverer workbooks to the database.

In all cases, whether modified in the customize portlet page or in the Single Worksheet Viewer, all customizations are stored on a per user, per portlet basis and are only viewable to that OracleAS Portal user. The customizations will not impact or be visible to other users.



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