Oracle® E-Business Intelligence

Embedded Data Warehouse Install Guide

Release 11*i*

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Oracle E-Business Intelligence Embedded Data Warehouse Install Guide, Release 11*i*

Part No. A90299-04

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Preface

Welcome to Release 11*i* of the *Oracle E-Business Intelligence Embedded Data Warehouse Install Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.

- If you have never used Oracle E-Business Intelligence, Oracle suggests you attend one or more of the Oracle Applications training classes available through Oracle University.

- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This guide contains the information you need to understand and use Oracle E-Business Intelligence. These user notes includes:

- Chapter 1, "Introduction" provides an overview of Oracle E-Business Intelligence and Embedded Data Warehouse.

- Chapter 2, "Installation Tasks" describes how to install Oracle E-Business Intelligence Embedded Data Warehouse.

- Chapter 3, "Upgrade Tasks" describes how to upgrade from previous releases of Oracle E-Business Intelligence Embedded Data Warehouse.

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JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

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This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle E-Business Intelligence.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **Online Help** - The new features section in the HTML help describes new features in 11*i*. This information is updated for each new release of Oracle E-Business Intelligence. The new features section also includes information about any features that were not yet available when this guide was printed. For example, if your administrator has installed software from a mini-packs an upgrade, this document describes the new features. Online help patches are available on MetaLink.

- **11*i* Features Matrix** - This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on MetaLink.

- **Readme File** - Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

Related Guides

Oracle E-Business Intelligence shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle E-Business Intelligence.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle E-Business Intelligence (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications Documentation Set

This documentation set includes *Oracle Applications AD Procedures Guide* and *Oracle Applications AD Utilities Reference Guide.*

Use these guides to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. They contain how-to steps, screenshots, and other information that you need to run the AD utilities. These guides also provide information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products

between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle E-Business Intelligence implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle E-Business Intelligence and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many education centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle E-Business Intelligence working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and

applications products, along with related consulting, education, and support services, in over 145 countries around the world.

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Thank you for using Oracle E-Business Intelligence and these user notes.

Oracle values your comments and feedback. In this guide is a reader's comment form that you can use to explain what you like or dislike about Oracle E-Business Intelligence or this user guide. Mail your comments to the following address or call us directly at (650) 506-7000.

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1

Introduction

This chapter contains an overview of Oracle E-Business Intleligence and Embedded Data Warehouse. It includes the following topics.

- Overview of E-Business Intelligence on page 1-2
    - Overview of Embedded Data Warehouse on page 1-2
- E-Business Intelligence Architecture on page 1-4
    - Embedded Data Warehouse Architecture on page 1-4

Overview of E-Business Intelligence

In becoming e-businesses, organizations have streamlined their internal processes to win new customers and to gain a larger share of their existing customers' business. New, internet-enabled, enterprise application suites and electronic market places are reducing inefficiencies across supply chains while providing new opportunities to improve customer relationships. As organizations adopt these new solutions, the need to make decisions faster has also increased. To remain competitive, every organization must empower more people to make informed decisions, without the need for long approval or review cycles.

To meet this challenge, organizations must provide the relevant business information and analysis tools that every manager or project team needs to quickly understand what is happening, to be able to analyze alternatives, and to take action. Business intelligence applications are available to provide the data and analysis required to make these decisions, but most business intelligence products are not integrated with operational systems. Because the business processes underlying source applications are always changing, traditional business intelligence applications cannot easily gather the necessary data or transform it into useful management information.

Oracle Business Intelligence with the Embedded Data Warehouse (EDW) provides a simple and powerful framework for delivering information, from internal applications and external sources, to end-users across the enterprise. EDW unlocks the value of information, held in operational systems, by automatically collecting, aggregating and transforming source data, to provide secure access and a unified view of the entire organization. With the Business Intelligence applications, everyone has immediate access to accurate and timely data to make faster and more informed decisions, which leads to a positive impact on bottom line results.

Overview of Embedded Data Warehouse

The Embedded Data Warehouse (EDW) is a foundation technology for Oracle Business Intelligence applications. This ready-to-run, end-to-end solution provides an open schema and extensible data warehousing architecture, powered by robust data warehousing tools. EDW:

- Gives users a unified view of the enterprise with its cross-functional analysis capabilities
- Leverages a common dimension model which enables seamless cross-functional analysis across the entire enterprise

- Includes fact tables from 7 intelligence areas: Financials, Projects, Purchasing, Manufacturing, Marketing, Human Resources, and Supply Chain

- Provides shorter time-to-benefit with its pre-defined enterprise schemas and hierarchies, and pre-built data collection and integration programs

EDW, the enabling technology of Oracle Business Intelligence, unleashes the power of e-business insight, not just information.

E-Business Intelligence Architecture

E-Business Intelligence is designed to support a multi-tiered architecture.

The first tier, the database tier, provides the foundation technology. The database tier can be implemented as a transactional (OLTP) or a warehouse (OLAP) schema. The transactional schema provides users with real-time report data. The warehouse schema provides users with summarized data that supports more complex reporting and decision making. The type of schema you choose determines the type of content that is available to your users.

The second tier, the applications tier, provides the load balancing and business logic. It processes requests from the third tier (client tier) and sends results from the database tier to the client tier.

The third tier, the client tier, supports user activities such as reporting from the web, and administration.

If you are installing EDW, you are implementing Business Intelligence using the warehouse schema.

> **Additional Information:**   For more information on Oracle Applications and multi-tier architecture, see *Oracle Applications Concepts.*

Embedded Data Warehouse Architecture

Physically, EDW divides the Business Intelligence architecture between two types of systems: one or more source systems and one target system.

A source system can be any Oracle Applications system, non-Oracle system running on an Oracle database, or legacy database application that provides data to the warehouse. You can use one or more source systems to provide data to the target system.

The target system is the runtime warehouse. There is only one target system. It integrates data from multiple source systems, transforms the data, and makes it available in a star schema design. The star schema design supports complex user reporting and decision making.

Source System Components

Source systems can be any Oracle Applications Release10.7, 11, or 11i system; non-Oracle system running on an Oracle database; or legacy database application that provides data to the warehouse. Each source system must contain the following components.

- **Database links:** Database links are used to connect the source system to the warehouse and from the warehouse to the source system.

- **Interface tables:** For EDW, source system data is put into interface tables before it is pushed to the warehouse.

- **Collect programs:** Collect programs determine how to extract and transform source data for the warehouse. Collect programs use the database links to transfer data from the interface tables to the warehouse and from the warehouse to the source system.

- **Concurrent Manager:** The concurrent manager coordinates the processes generated by users' requests to run various data-intensive programs.

- **Web Browser:** A web browser is used with Oracle Applications 11i source systems. This is only necessary on an Oracle Applications 11i source system.

These components must be installed and set up on each source system.

Target System Components

The target system is an Oracle Applications Release 11i.3 system (or higher) with an Oracle 8i or 9i database. The target system summarizes data from the various source systems into a data warehouse (from this point forward, this document will refer to the target system as the warehouse). The warehouse contains fact tables, dimension tables, APIs, and other supporting utilities and objects. It must also contain the following components:

- **Load programs:** Load programs use the EDW metadata to determine how to move data into the warehouse. Load programs transfer data from interface tables to warehouse schema.

- **Database Links:** Database links are used to connect the source system to the warehouse and from the warehouse to the source system.

- **EDW Metadata:** The EDW metadata defines the contents of the runtime warehouse: the facts, dimensions, and other objects. The loader engine uses the metadata to define how to move data into the warehouse schema. The reporting and analytical tools also use the metadata.

- **Oracle Discoverer End User Layer:** The Oracle Discoverer End User Layer (EUL) is a schema that sits on the warehouse database. This schema is used to access the workbooks. Workbooks and the EUL must reside on the database tier of the warehouse.

- **Oracle Discoverer Workbooks:** Workbooks enable users to analyze the summarized data in the warehouse. Workbooks access data through the Oracle Discoverer EUL. Workbooks and the EUL must reside on the database tier of the warehouse.

- **Oracle Warehouse Builder Repository:** The Oracle Warehouse Builder (OWB) repository resides on the database tier of the warehouse. This repository stores the EDW metadata.

- **Interface tables:** For EDW, source system data is loaded into interface tables before it is transformed into the star schema on the warehouse.

- **Concurrent Manager:** The concurrent manager coordinates the processes generated by users' requests to run various data-intensive programs.

- **Forms Server:** The Forms Server is automatically installed as part of the Oracle Applications 11i.3 (or higher) Rapid Install.

- **Oracle Discoverer 4i Web Client:** The Oracle Discoverer 4i Web Client is installed as a separate application. The client contains a web browser with the Oracle Discoverer Web Client plug-in that executes the workbooks.

- **Self Service Web Applications:** Self Service Web Applications is automatically installed as part of the Oracle Applications 11i.3 (or higher) Rapid Install. .

- **Zip utility:** This utility is used to extract compressed files.

- **Oracle Warehouse Builder Client:** The OWB client provides front-end access to the OWB repository. The OWB client must be installed on a Windows NT/2000 machine. It is the recommended tool for viewing the EDW metadata.

- **Oracle Discoverer Bridge Client:** The Oracle Discoverer Bridge client is used to create the EUL from the EDW metadata. The bridge is installed as part of the typical Oracle Warehouse Builder install. The bridge can reside on the same physical machine as the OWB client.

- **Oracle Discoverer Administration Client:** The Oracle Discoverer Administration client is installed as a separate application. The client is used for administration of the Oracle Discoverer EUL. You use this client to import the EUL and configure security for Oracle Discoverer. The Oracle Discoverer Administration client must be installed on a Windows NT/2000 machine.

- **Web Browser:** A web browser is used to view warehouse data.

- **Performance Management Framework components:** The following is a list of the components that comprise the Performance Management Framework.

  - **Presentation components:** The Performance Management Graph Portlet allows end users to display graphs from the Performance Management Viewer reports. Through customization of this portlet the end user can choose a report and parameters for display.

    The Performance Management List portlet allows end-users to view performance information from the personal homepage. Through customization of this portlet, an end user can choose measures and parameters. The actual values will display, with red color coding if the actual value falls outside of the tolerance range. The values of the measure are calculated through the processing of Alerts.

    Through the Business Intelligence Performance Management Viewer, end users have access to a set of pre-built reports that are specifically tailored to intelligence users. These reports provide an intuitive user interface and features aimed at the novice end user. Note that previous versions of BIS used Oracle Reports to define and render reports. In this release, Business Intelligence uses its own Performance Management Viewer technology.

    Through Oracle Workflow, users receive notifications. Business Intelligence uses notifications for alerting users to out of tolerance situations for measures with targets.

  - **Definition components:** The AK Repository is a metadata repository used for the definition of application common data. For Business Intelligence we use the AK Repository in defining Performance Management Viewer reports and Performance Measures. This definition contains layout information for the reports and establishes the source of actual values for both the reports and performance measures.

    The Performance Management Framework contains a set of forms to define performance measures and the dimension levels. These forms allow administration users to assign the dimensions, security, corrective actions and automated target retrieval. Note that a measure also needs setup in the AK repository to enable the retrieval of actual values.

  - **Responsibilities:** The following responsibilities are used for setting up the Performance Management Framework: Performance Management Framework (Full Access), Performance Management Framework (Targets Access), BIS Super User.

The following responsibilities contain Performance Management Viewer Reports: Purchasing Intelligence - Embedded Data Warehouse, Supply Chain Intelligence - Embedded Data Warehouse, Manufacturing Intelligence - Embedded Data Warehouse.

- **Data components:** For Business Intelligence Reports and Performance Measures, intelligence teams have built a set of Views on top of the EDW fact tables. These views are optimized for use by the Viewer Reports and Performance Measures.

  The Performance Management Framework contains a set of forms for use in entering and maintaining target information on performance measures. This includes target values, tolerance ranges and target owners.

- **Processing components:** Through the Performance Management Framework, administration users can schedule alerts and target users can subscribe to the notifications. Schedule Alerts will send notifications to target owners and update data for presentation on the performance measure portlet. Note that previous versions of BIS utilized Oracle Alerts to achieve the alerting functionality. In this release, Business Intelligence contains its own alerting technology.

2

Installation Tasks

This chapter describes how to install and configure Oracle E-Business Intelligence Embedded Data Warehouse (EDW). This chapter covers the following topics.

- Overview of Installing the EDW Repository and EUL on page 2-2
- Verify Prerequisites on page 2-4
- Set Up Database Links on page 2-6
- Install Oracle Warehouse Builder 9i and Repository on page 2-10
- Check Validation Point on page 2-20
- Create the EDW EUL and Import EDW Workbooks on page 2-21
- Configure Security on page 2-27
- Backup Source Systems and Warehouse on page 2-32

Overview of Installing the EDW Repository and EUL

This chapter describes how to install the EDW repository and end user layer (EUL). Some of the steps in this installation are dependent on particular hardware or software being installed and configured before you begin. Some of the steps are optional, must be performed in a particular order, or require that you validate the step with your implementation team.

To avoid unexpected delays in the installation, please read through this entire install guide and familiarize yourself with the install process before you begin.

> **Important:** It is highly recommended that this installation be performed by an Oracle Applications database administrator in cooperation with the implementation team.

The following table contains a checklist that you can use when installing EDW.

Table 2–1 Installation Steps

Step	Location	Task List
Verify Prerequisites on page 2-4	Source Systems Warehouse System Administration Client	■ Hardware Prerequisites ■ Software Prerequisites ■ Tablespace Prerequisites
Set Up Database Links on page 2-6	Source Systems Warehouse System	■ Set Up Links from Warehouse to Source Systems ■ Set Up Links from Source Systems to Warehouse ■ Set Up Database Links for Single Instance EDW
Install Oracle Warehouse Builder 9i and Repository on page 2-10	Warehouse System	■ Install Oracle Data Warehouse Builder 9i. For more information, see the *Oracle 9i Warehouse Builder Installation Guide Release 9.2.0.2.8*. ■ Install OWB Repository

Table 2–1   Installation Steps

Step	Location	Task List
Check Validation Point on page 2-20	Warehouse	■ Check Validation Point, for more information see *Oracle Embedded Data Warehouse Implementation Guide*:
		■ Complete flexfield mapping (optional)
		■ Complete user defined attribute mapping (optional)
		■ Complete modification of metadata (optional)
Create the EDW EUL and Import EDW Workbooks on page 2-21	Discoverer 4i Administrative Client machine Warehouse System	■ Create the EUL ■ Generate the EDW EUL EEX File, for more information see *Oracle Embedded Data Warehouse Implementation Guide* ■ Import the EDW EUL EEX File
Configure Security on page 2-27	Discoverer 4i Administrative Client machine Warehouse System	■ Grant Users/Responsibilities Access to Oracle Discoverer 4i User, or Administration Client. For more information, see the Oracle Discoverer documentation. ■ Grant Users/Responsibilities Access to Business Areas ■ Transfer EDW Discoverer 4i Contents to Windows NT/2000/XP Client ■ Define Default Profile Options
Backup Source Systems and Warehouse on page 2-32	Source Systems Warehouse System	■ Backup data on source systems and warehouse (optional)

Verify Prerequisites

Before you begin to install EDW, you must verify that all hardware and software prerequisites have been met.

This section contains the following topics.

- Hardware Prerequisites
- Software Prerequisites
- Tablespace Prerequisites

Hardware Prerequisites

To successfully complete the installation, you must have the following hardware available.

Source Systems

For information on hardware requirements for your 11i source systems, see the installation documentation for the respective system.

Warehouse

For the hardware requirements for the database, see *Oracle 8i(9i) Installation Guide.*

For the hardware requirements and supported platforms for Oracle Discoverer, see *Oracle Discoverer 4i Installation Guide.*

For the hardware requirements for Oracle Applications 11i see *Installing Oracle Applications 11i.*

Administrative Client

For the hardware requirements for Oracle Warehouse Builder Client, see *Oracle 9i Warehouse Builder Installation Guide Release 9.2.0.* The OWB Client is installed into Oracle 8i home on a Windows NT/2000/XP machine. The Windows NT/2000/XP server should have at least 1 GB of RAM and 2 GB of space for installing the OWB Client and converting the OWB metadata repository.

Software Prerequisites

To successfully complete the install, you must have the following software available on the source system and warehouse servers.

Source Systems

You must have one or more of the following standard source systems. For information on the standard install for each source system, see the appropriate installation documentation.

- Oracle Applications Release 11i with patch set 3 or higher

You must also have the EDW Release 4.2 mini-pack, with the source patchset (11i.EWS.D) installed on each source system. For more information see *About Oracle Embedded Data Warehouse for Release 4.2* on Oracle Meta*Link*.

Warehouse

You must have the following standard warehouse system. For information on the install for the warehouse system, see the appropriate installation documentation.

- Oracle Applications Release 11i with patch set 3 or higher

You must also have the EDW Release 4.2 mini-pack, with the warehouse patchset (11i.EDW.D) installed on the warehouse system. For more information see *About Oracle Embedded Data Warehouse for Release 4.2* on MetaLink.

For RDBMS 8i only, update your `init.ora` parameter file with the following initialization parameters:

```
star_transformation_enabled = true
bitmap_merge_area_size = 1048576
create_bitmap_area_size = 8388608
```

The *bitmap_merge_area_size* and *create_bitmap_area_size* parameters should be set to their default values. The ranges of these values are operating system dependent.

Administrative Client

The following software must be installed on the Administrative Client.

- Oracle 9.2.x Warehouse Builder Client with Common Warehouse Metadata Transfer Wizard
- Oracle Discoverer 4i Administration Edition Client (version 4.1.48)
- Oracle Discoverer 4i User Edition Client (version 4.1.48)

> **Note:** It is highly recommended to use separate Windows NT/2000/XP machines to install Oracle 9i Warehouse Builder Client software and Oracle Discoverer 4i Clients. In all cases Windows NT/2000/XP boxes with either OWB or Discoverer software installed will be referred as *Administrative Client* throughout this document.

Tablespace Prerequisites

The tablespace requirements for EDW databases are listed below. Database tablespaces must be created in the source systems and in the warehouse system. The OWB repository tablespace must be created on the warehouse system only.

OWB Repository Tablespace

Before you install EDW Oracle Warehouse Builder metadata and generate the EDW EUL, you must create a tablespace for your EDW metadata in the warehouse. This document refers to the USER_DATA tablespace as the default tablespace for the EDW Oracle Warehouse Builder repository schema and EDW EUL.

- EDWREPD - default data and snapshots tablespace. The tablespace size should be at least 600 MB.

- EDWREPX - default index tablespace. The tablespace size should be at least 400 MB.

Rollback Tablespace

Before you install EDW Oracle Warehouse Builder metadata and then generate the EDW EUL, make sure you allocate enough extents to the rollback segments and you have at least 400Mb of free space in rollback segments tablespace.

Set Up Database Links

The EDW Source patchset (11i.EWS.D), creates the following default database links on the source system:

- EDW_APPS_TO_WH

- APPS_TO_APPS

The EDW Warehouse patchset (11i.EDW.D), creates the following default database links on the warehouse system:

- EDW_APPS_TO_WH

- APPS_TO_APPS

If both Source and Warehouse components of EDW share single instance of Oracle Applications 11i then the same pair of default database links will be present in Apps schema.

These default generic database links must be set up properly as described below.

> **Attention:** Customers, who implement both Source and Warehouse components on the single instance of Oracle Applications 11i, please skip the "Set Up Links from Warehouse to Source Systems" and "Set Up Links from Source Systems to Warehouse" sections and go directly to "Set Up Database Links for Single Instance EDW".

Set Up Links from Warehouse to Source Systems

You must set up a dedicated link from warehouse to each of source systems. These links are used to pass configuration information from the warehouse to the source systems.

Do not drop or modify the default generic database links created by 11i.EDW.D (EDW_APPS_TO_WH and APPS_TO_APPS). Those links are essential for proper functioning of EDW warehouse component.

To set up database links from warehouse to source systems:

1. Sign on to the warehouse database instance as APPS user using SQL*Plus. For instance:

   ```
   >sqlplus apps/<apps_passwd>@tst115
   ```

2. Create a database link EDW_WH_TO_<SOURCE_NAME> from the warehouse to each source system using the following syntax:

   ```
   >create database link <linkname> connect to <Oracle_Applications_Schema>
   ```

   identified by <password> using '<connect_string>';

   The following example illustrates how to create links from the warehouse to two sources: edw110s and edw107s:

```
>create database link EDW_WH_TO_EDW110S connect to apps identified by apps
using 'edw110s';

 >create database link EDW_WH_TO_EDW107S connect to apps identified by apps
using 'edw107s';
```

3. Repeat the previous steps for each source system that you want to link to the warehouse.

Set Up Links from Source Systems to Warehouse

Once you set up database links from your warehouse to your source system(s), you must also set up links from the source system(s) to the warehouse.

To set up the source database links, first drop generic EDW_APPS_TO_WH link and then recreate it. You must not change the APPS_TO_APPS database link.

To set up links from source system(s) to warehouse:

1. Sign on to the soure database as APPS user using SQL*Plus. For example:

    ```
    >sqlplus apps/<apps_passwd>@edw110s;
    ```

2. Drop the generic database link EDW_APPS_TO_WH that was delivered with the source EDW patchset, 11i.EWS.C using the following syntax.

    ```
    >drop database link EDW_APPS_TO_WH;
    ```

3. Create the database link from the source system to the warehouse system using the following syntax:

    ```
    >create database link EDW_APPS_TO_WH connect to <Oracle_Applications_Schema>
    identified by <password> using '<connect_string>';
    ```

    The following example illustrates how to connect the source system to the warehouse named tst115:

    ```
    >create database link EDW_APPS_TO_WH connect to apps identified by apps
    using 'tst115';
    ```

4. Repeat the previous steps for each source system.

Set Up Database Links for Single Instance EDW

To set up database links correctly for single instance EDW, use a sequential approach. First, consider your instance to be warehouse system. Assume that you

must create an EDW_APPS_TO_<SOURCE> database link, where SOURCE is the same system. Second, consider your system to be the source and replace the generic link (EDW_APPS_TO_WH) with the link that points to the same system.

To set up links on the single instance EDW:

1. Sign on to the database as APPS user using SQL*Plus. For example:

   ```
   >sqlplus apps/<apps_passwd>@tst115
   ```

2. Create a database link EDW_WH_TO_<SELF> from the warehouse to each source system using the following syntax:

   ```
   >create database link EDW_WH_TO<SELF> connect to apps identified by apps
   using '<connect_string>';
   ```

   The following example illustrates how to create link from the warehouse to the source located at the same Oracle Applications instance:

   ```
   >create database link EDW_WH_TO_TST115 connect to apps identified by apps
   using 'tst115';
   ```

3. Repeat step 2 for each standalone source system you want to link to the warehouse.

4. Drop the generic database link EDW_APPS_TO_WH using the following syntax:

   ```
   >drop database link  EDW_APPS_TO_WH;
   ```

5. Create database link EDW_APPS_TO_WH which connects to the same instance of Oracle Applications using APPS schema using the following syntax:

   ```
   >create database link EDW_APPS_TO_WH connect to <Oracle_Applications_Schema>
   identified by <password> using '<connect_string>';
   ```

   For example:

   ```
   >create database link EDW_APPS_TO_WH connect to apps identified by apps
   using 'tst115';
   ```

Install Oracle Warehouse Builder 9i and Repository

To install Oracle Warehouse Builder 9i and the Oracle Warehouse Builder repository, complete the following steps:

- Install Oracle Data Warehouse Builder 9i on page 2-10

- Install OWB Repository on page 2-11

Install Oracle Data Warehouse Builder 9i

Use the following steps to install Oracle Data Warehouse Builder 9i.

1. Obtain Oracle 9i Warehouse Builder 9.2.0.2.8 CD. This CD is included in the Oracle Applications Release 11*i*(11.5.10) CD Pack

2. Install Oracle9i Warehouse Builder Client on the OWB Administrative Client. For more information on how to install the OWB client, see the *Oracle 9i Warehouse Builder Installation Guide Release 9.2.0.2.8*.

   > **Note:** The OWB Administrative Client machine must have at least 512 MB of RAM and 1 Gigabyte of virtual memory. 400 MB of disk space must be allocated for the EDW EUL EEX file. For detailed hardware requirements, see: Hardware Prerequisites on page 2-4.

3. Apply the mandatory OWB9i Client patch 3455473.

   a. Download the patch 3455473 from Oracle Metalink into a temporary directory on your Windows OWB Administrative Client machine.

   b. Follow the instructions in the *readme.txt* file located in the uncompressed patch directory to apply the patch to your OWB9i Client.

4. After completing the OWB client install, execute the *EDW_Config.bat* script located in <OWB9i Home>\owb\bin\win32 on the OWB Administrative Client machine. This script requires the command line argument <OWB9i Home> :

   ```
   <drive>:\ <OWB9i Home>\owb\bin\win32\EDW_Config.bat  <OWB9i Home>
   ```

   For example:

   ```
   D:\> d:\OWB9.2\owb\bin\win32\EDW_Config.bat D:\OWB9.2
   ```

Install OWB Repository

The OWB Repository enables you to manage EDW metadata on the warehouse. You must install the OWB Repository on the database.

The steps below briefly describe how to install OWB9i repository:

To install OWB Repository:

1. On the OWB Administrative Client machine, start the Oracle Warehouse Builder Repository Assistant from the Oracle Warehouse Builder program group. The Welcome window appears.

Figure 2–1   Welcome window

2. Click Next. The Server and SYSDBA Information window appears.

Figure 2–2   Server and SYSDBA window
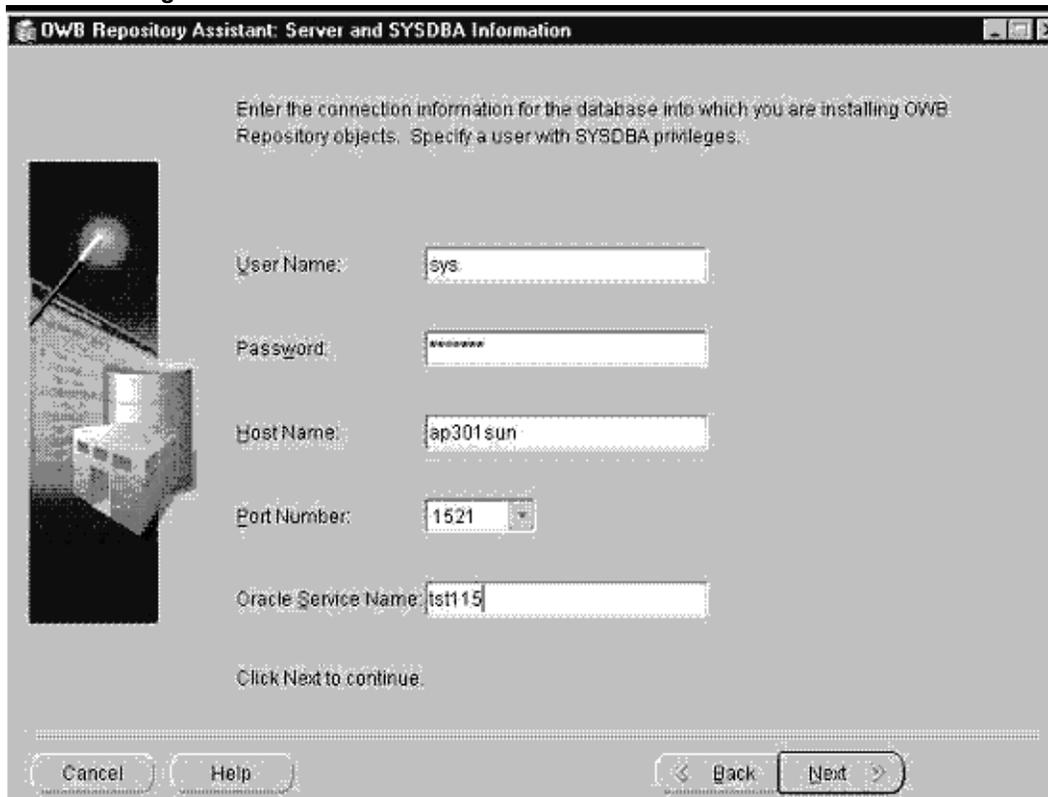
3.   Click Next. The Create or Drop window appears.

Figure 2–3   Create or Drop window
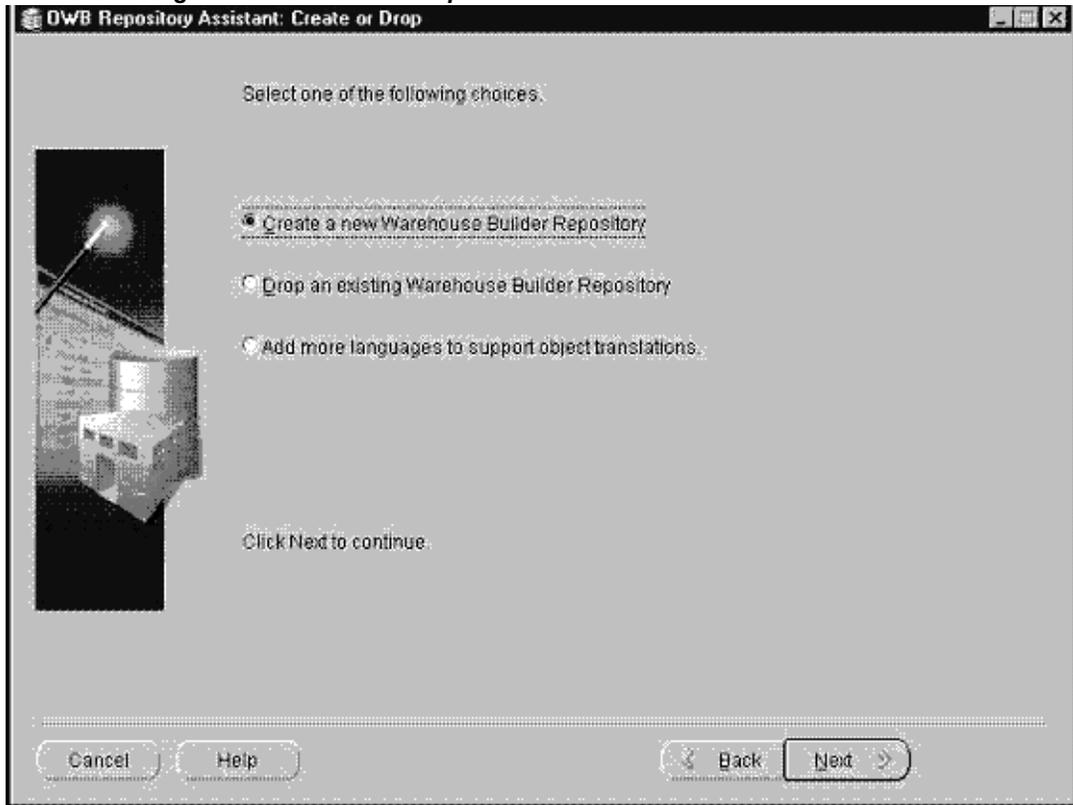
4. Choose the Create a new Warehouse Builder Repository option and click Next. The New or Existing Schema window appears.

Figure 2–4   New or Existing Schema window
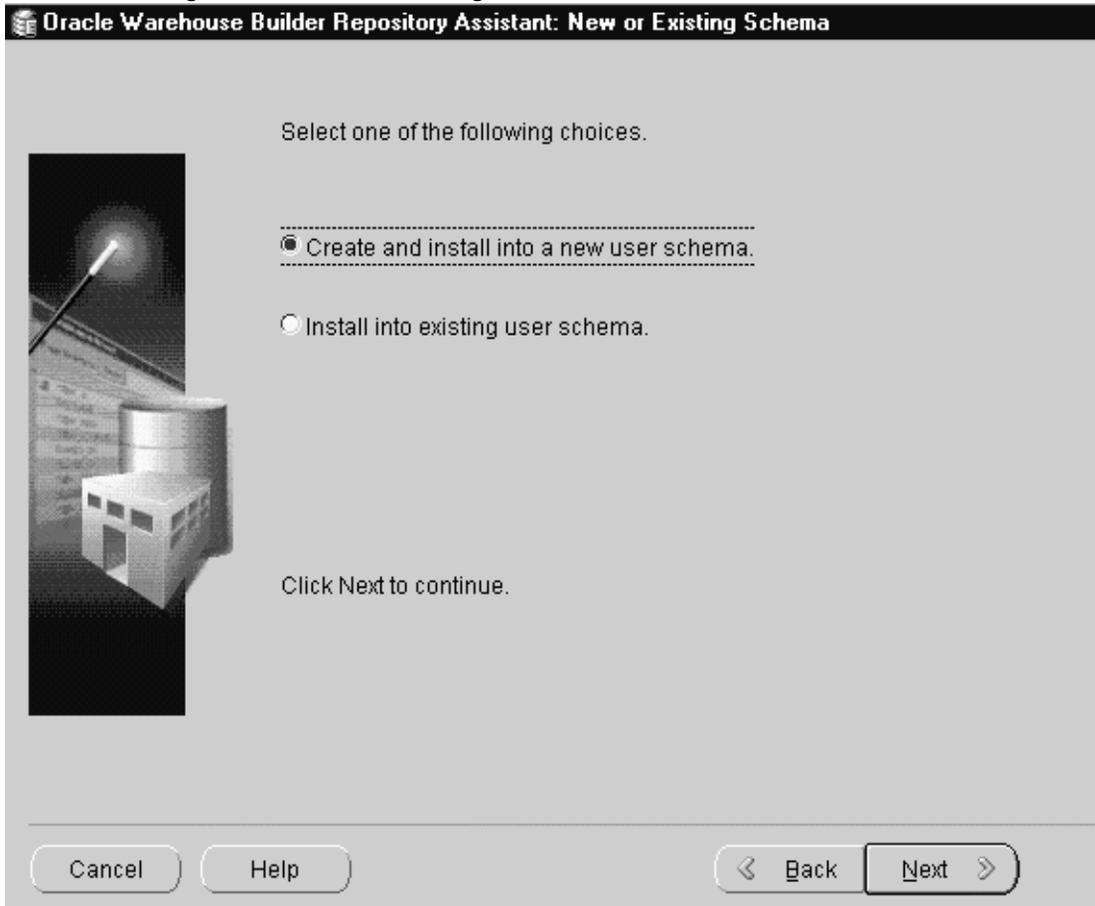
5. Choose the "Create and install into new user schema" option and click Next. The Username and Password (New) window appears.

Figure 2–5   User Name and Password (New) window

6. Enter the following information:

User Name: edwrep

Password: <edwrep user password>

Click Next. The Tablespace window appears.

Figure 2–6   Tablespace window

7. Chose the default data tablespace for EDWREP database schema from the "Select the tablespace for data" list of values.

8. Chose the default index tablespace for EDWREP database schema from the "Select the tablespace for indexes" list of values.

9. Chose the temporary tablespace for EDWREP database schema from the "Select the tablespace for temporary data" list of values.

10. Chose the default tablespace for snapshots for EDWREP database schema from the "Select the tablespace for snapshots" list of values. Click the Next button to continue. The Define Languages window appears.

Figure 2–7   Define Languages window

11. Choose "American English" from the "Choose MLS base language" list of
values. Click Next to continue. The Summary window appears.

Figure 2–8   Summary window
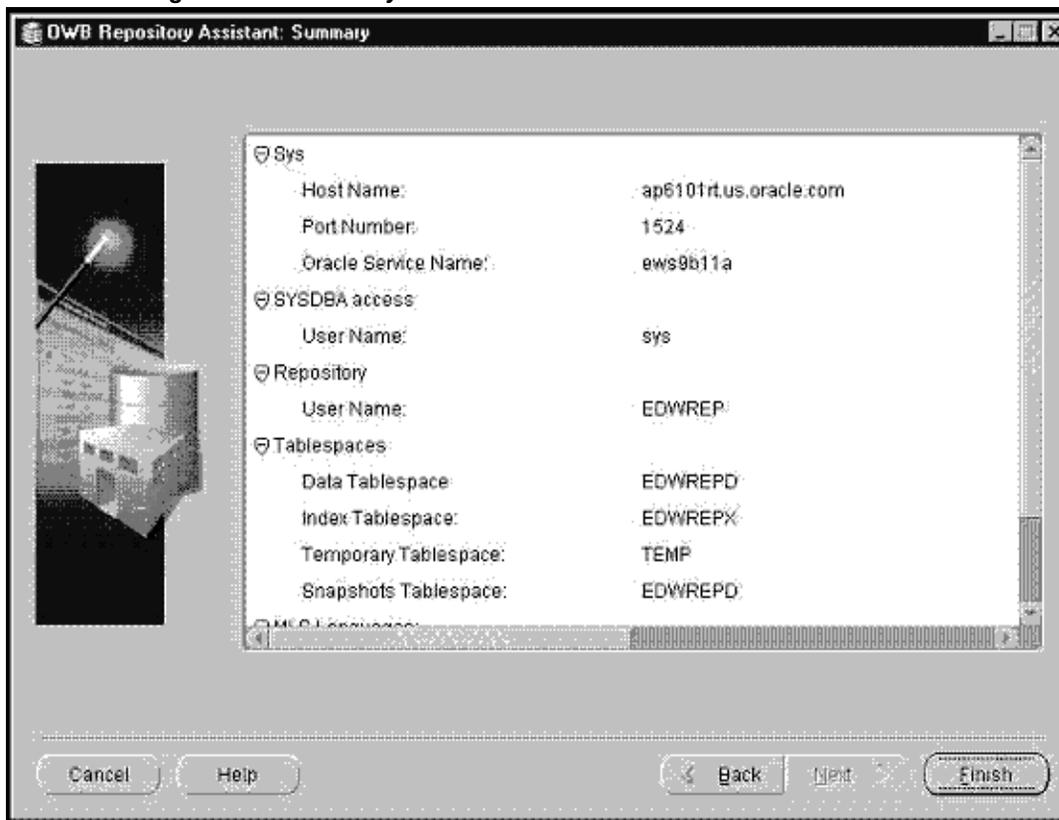
12. The Summary window contains a list of all the selections you have made. Verify that the OWB repository setup information is correct.

   a. If the setup information is incorrect, click the Back button until you reach the appropriate screen and re-enter the correct values. Click the Next button repeatedly until you return to the Summary window.

   b. If the set up information is correct, choose the Finish button. The Embedded Data Warehouse schema is created and installed in your warehouse.

13. Apply patch 3295986 to populate the EDW Repository.

> **Important:**   OWB9i Repository schema EDWREP is registered in this release as an External schema for Oracle Applications.
>
> Execute the FNDCPASS command on the administration tier to propagate the EDWREP password into the Warehouse instance. The password must be the same as EDWREP password used during OWB Repository creation (step 7 on page 2-16):
>
> - $ FNDCPASS apps/<apps password> 0 Y system/<system password> ORACLE edwrep <edwrep password>
>
> For example:
>
> - $ FNDCPASS apps/apps 0 Y system/manager ORACLE edwrep edwrep
>
> Make sure you have at least 600 MB of free space in the data tablespace of BIS schema.

Apply patch 3295986 to the warehouse. The estimated time for running the patch is one hour. Use AutoPatch to apply the patch drivers in the following order (if they exist):

- c3295986.drv (on all servers)
- d3295986.drv (on administration server only)
- g3295986.drv (on all servers)

Check Validation Point

At this point, you should contact your implementation team.

Verify whether the implementation team is planning to perform any of the following *optional* implementation tasks at this validation point:

- Mapping flexfields (Accounting, Key, Descriptive)
- Mapping user-defined attribute
- Modifying EDW metadata

If the implementation team *is* planning to perform any of these tasks, stop and complete these tasks before proceeding.

For more information on how to implement EDW, see the *Oracle Embedded Data Warehouse Implementation Guide*.

Create the EDW EUL and Import EDW Workbooks

Once you have set up the warehouse, you must install the EUL and workbooks. Complete the EUL and workbook installation steps in the following order.

1. Create the EUL on page 2-21

2. Generate the EDW EUL EEX File on page 2-22

3. Import the EDW EUL EEX File on page 2-25

Create the EUL

The first step in installing the EUL and workbooks is to create an applications-mode EUL that supports specific Oracle Applications functionality. This functionality is required to run EDW.

> **Note:** Before creating the EUL you should identify the default tablespace for the EUL owner. Ensure that you have this tablespace available on the warehouse before you proceed. This document refers to the USER_DATA tablespace as the default tablespace for the EUL database schema in the examples.

To create the EUL:

> **Note:** Before performing steps in this section, please verify that Discoverer 4i Administration Edition is installed on a Windows NT/2000/XP PC. This PC will be referred to hereafter as the *Discoverer4i Administrative Client machine*.

1. Create a separate tablespace for the EDW EUL database schema. Ensure that the storage parameter MAX_EXTENTS is at least 150.

2. On the Discoverer4i Administrative Client machine, open an MS-DOS command prompt window and run the following command:

```
dis4adm.exe  /CREATE_EUL  /APPS_MODE  /CONNECT system/<system
password>@<database>  /USER  EDWEUL_US  /PASSWORD <edweul_us password>
/DEFAULT_TABLESPACE  <edweul_us user default tablespace> /TEMPORARY_
TABLESPACE  <temporary tablespace>  /SET_EUL_LANGUAGE <Language code>
/APPS_GRANT_DETAILS  apps/<apps password>   /SHOW_PROGRESS
```

For example:

```
dis4adm.exe  /CREATE_EUL  /APPS_MODE  /CONNECT system/manager@tst115  /USER
EDWEUL_US  /PASSWORD edweul  /DEFAULT_TABLESPACE  user_data  /TEMPORARY_
TABLESPACE  temp /SET_EUL_LANGUAGE US /APPS_GRANT_DETAILS  apps/apps
/SHOW_PROGRESS
```

A window showing the EUL installation progress appears in a couple of seconds. Wait until the EUL installation is over before proceeding with the installation.

Generate the EDW EUL EEX File

Generate the EDW EUL EEX file using the CWM transfer wizard on the OWB Administrative Client machine. This wizard generates an ASCII export file based on user-defined flexfields, attribute mappings, and Applications Integrator set-ups. You will later import this file into the database tier of the warehouse.

> **Note:** The OWB Administrative Client machine must have at least 512 MB of RAM and 1 Gigabyte of virtual memory. 400 MB of disk space must be allocated for the EDW EUL EEX file. For detailed hardware requirements, see: Hardware Prerequisites on page 2-4.

To generate the EEX file:

1. Log on to the OWB Administrative Client machine and run OWB as an owner of the EDW OWB repository schema. For example, EDWREP/EDWREP@TST115.

2. Select the project "EDWPRJ".

3. Choose the OK button.

Figure 2–9   Oracle Warehouse Builder: Metadata Export Window
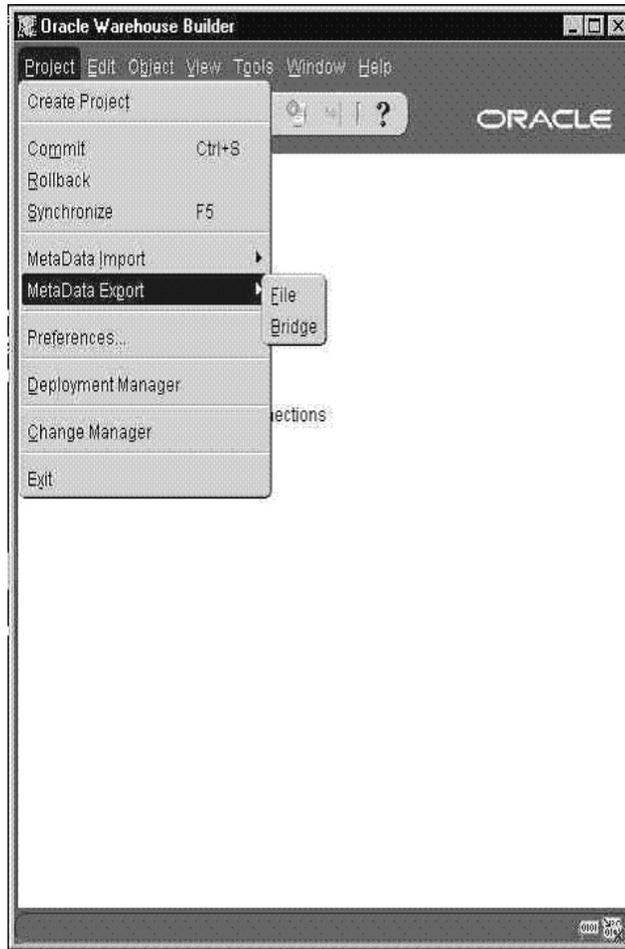
4.   From the Projects menu, choose Metadata Export > Bridge. The CWM Transfer Wizard appears.

Configure the wizard to generate the EDW EUL. When using the wizard, ensure that "Oracle Discoverer" is the selected target product on "Metadata Source and Target Identification" window and that the following values are provided for the "CWM Transfer Parameters" window.

Figure 2–10   CWM Transfer Parameters Window
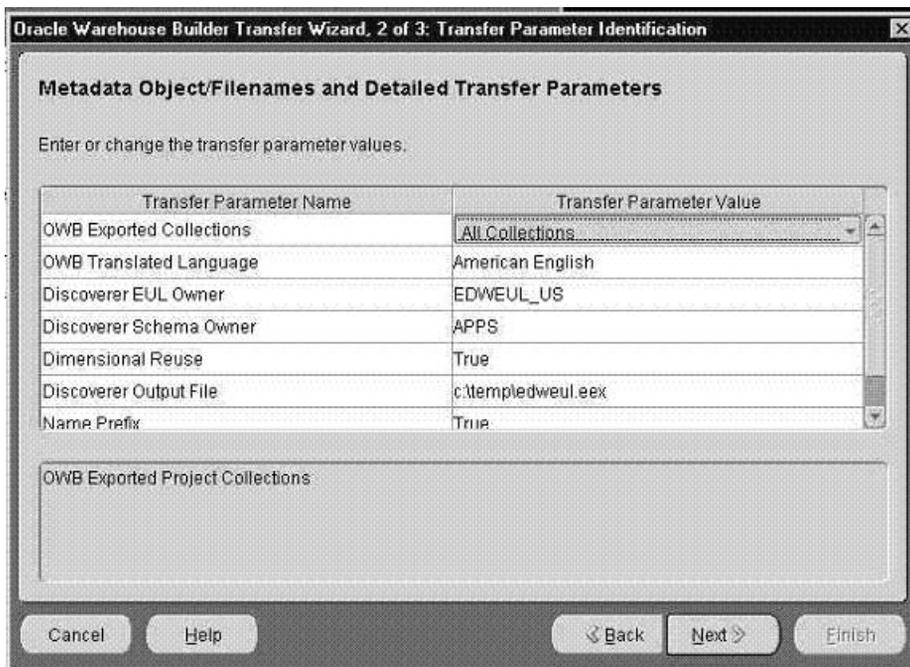
Table 2–2   CWM Transfer Parameters

Transfer Parameter	Value
OWB Exported Collections	All Collections
OWB Translated Language	American English
Discoverer EUL Owner	EDWEUL_US
Discoverer Schema Owner	APPS
Dimensional Reuse	True
Discoverer Output File	edweul.exe
Log Level	Information

Once you have verified the preceding parameter values, you have generated the EDW EUL and you can proceed with the EUL import.

Import the EDW EUL EEX File

After you have generated the EEX file, you can use the Oracle Discoverer 4i Administration Edition client to import the EEX file into the warehouse system database.

> **Additional Information:** See the *Oracle Discoverer 4i Administration Guide* for more information on how to import the EEX file.

To import the EEX file:

1. Copy the *edweul.eex* file to the Discoverer4i Administration Client machine.

2. Run Discoverer Administration Client and connect as the EUL owner. For example, EDWEUL_US.

3. Choose Import from the File menu.

4. Choose *edweul.eex* from the list of values and choose Add.

5. Ensure that you select the following import options:

   - Refresh the object

   - By Identifier

   - Always take ownership of imported workbooks

Figure 2–11 Oracle Discoverer 4i EUL Import Options
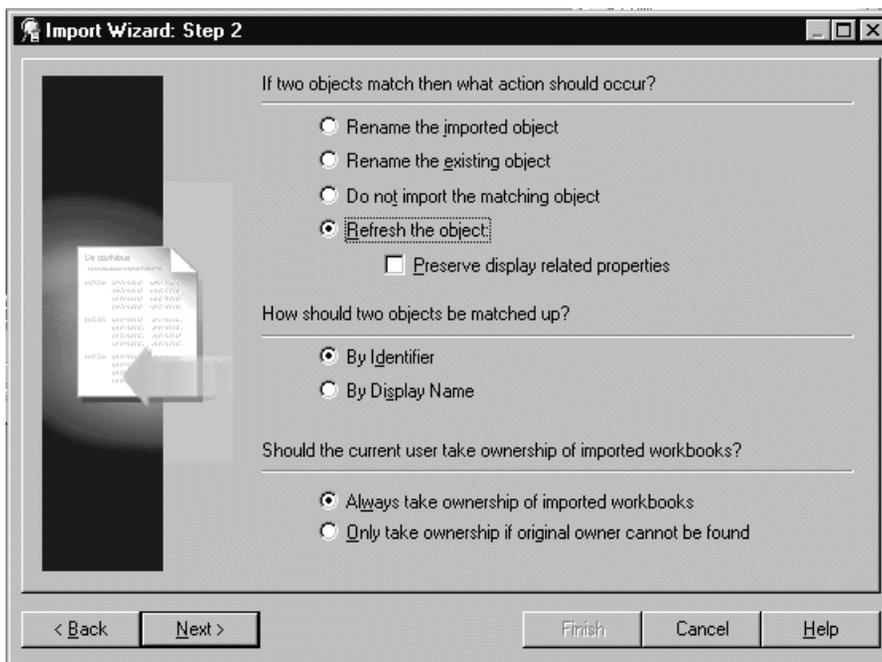
6. Choose Start. The import process begins.

7. After the import is over, click the Finish button and wait until SQL regeneration is done.

Configure Security

To configure security using Oracle Discoverer 4i, complete these steps in the following order.

1. Grant Users/Responsibilities Access to Oracle Discoverer 4i User, or Administration Client on page 2-28

2. Grant Users/Responsibilities Access to Business Areas on page 2-29

3. Transfer EDW Discoverer 4i Contents to Windows NT/2000/XP Client on page 2-30

4. Define Default Profile Options on page 2-32

Grant Users/Responsibilities Access to Oracle Discoverer 4i User, or Administration Client

Grant users and responsibilities access to Oracle Discoverer 4i Plus. Limit the number of users who are granted access to Oracle Discoverer 4i Administration Edition client.

> **Important:** Throughout this section, be sure you are using the EDW EUL (edweul_us) user.

To grant access to Oracle Discoverer 4i Plus or Administration Client:

1. Log in to the Oracle Discoverer 4i Administration Client machine and run the Oracle Discoverer 4i Administration Edition client.

2. Connect to the database as the edweul owner (EDWEUL_US), for example:

   ```
   edweul_us/edweul@database
   ```

3. Check the default EUL by doing the following:

   a. Set the default EUL by choosing Select Tools > Options > Default EUL.

   b. Set the default to EDW EUL owner. For example, EDWEUL_US.

4. Grant the user or responsibility access to Oracle Discoverer 4i Plus or Administration Client by doing the following:

   a. Choose Tools > Privileges.

   b. Select the responsibility. For example, "Sysadmin - System Administrator".

   c. Give the responsibility access to either the 4i Plus or Administration Edition (or both, if necessary) by selecting the appropriate checkboxes.

   d. Repeat steps a to c for each of the following responsibilities:

   - Financial Intelligence - Enterprise DataWarehouse

   - Manufacturing Intelligence - Enterprise DataWarehouse

   - Purchasing Intelligence - Enterprise DataWarehouse

   - Supply Chain Intelligence - Enterprise DataWarehouse

   - Human Resources Intelligence - Enterprise DataWarehouse

Grant Users/Responsibilities Access to Business Areas

Once you grant the users/responsibilities access to Oracle Discoverer 4i, you must grant them access to the applicable business areas. You can also create new responsibilities if the ones provided do not meet your needs.

Table 2–3 Responsibilities and Business Areas

Responsibility	Business Area	Has Access To…
Financials Intelligence - Enterprise Data Warehouse	EDW_COMMON_MODULE_ Payables Intelligence business area	Access to Business Intelligence System Payables Business Area and Workbooks
Financials Intelligence - Enterprise Data Warehouse	EDW_COMMON_MODULE_ Revenue Intelligence business area	Access to Business Intelligence System Receivables Business Area and Workbooks
Financials Intelligence - Enterprise Data Warehouse	EDW_COMMON_MODULE_Project Intelligence business area	Access to Business Intelligence Projects Business Area and Workbooks
Human Resources Intelligence - Enterprise Data Warehouse	EDW_COMMON_MODULE_Human Resource Intelligence - Workforce Planning business area	Access to Business Intelligence Workforce Planning Business Area and Workbooks
Manufacturing Intelligence - Enterprise Data Warehouse	EDW_COMMON_MODULE_ Manufacturing Intelligence business area	Access to Business Intelligence System Manufacturing Business Area and Workbooks
Manufacturing Intelligence - Enterprise Data Warehouse	EDW_COMMON_MODULE_ Operations Intelligence business area	Access to Business Intelligence System Operations Business Area and Workbooks
Purchasing Intelligence - Enterprise Data Warehouse	EDW_COMMON_MODULE_ Purchasing Intelligence business area	Access to Business Intelligence System Purchasing Business Area and Workbooks
Supply Chain Intelligence - Enterprise Data Warehouse	EDW_COMMON_MODULE_ Supply Chain Intelligence business area	Access to Business Intelligence System Supply Chain Business Area and Workbooks

To grant users/responsibilities access to Business Areas:

1. In Oracle Discoverer 4i Administration Edition client, choose Tools -> Secutiry.

2. Select the responsibility.

3. Grant the responsibility access to the business areas, as shown in the table above.

4. If the responsibility needs adminitrative access to the business area, enable the Allow Administration checkbox.

5. Connect to Discoverer 4i Administration Edition as a valid Applications user with a valid responsibility (for example, "SYSADMIN:System Administrator"), which has been granted access to Discoverer 4i Administration Client (see: Grant Users/Responsibilities Access to Oracle Discoverer 4i User, or Administration Client on page 2-28) and validate your folders by choosing Choose View -> Validate Folders.

For more information on how to grant access and define EUL security, see the *Oracle Discoverer 4i Administration Guide*.

> **Important:** The Process Manufacturing Intelligence Business Area has been obsolete. Please do not refresh the Business Area, do not validate and do not use the contents of the following folders for building custom workbooks:
>
> - Formula Dimension
> - Grade Dimension
> - PMI Batch Detail Fact
> - PMI Batch Grade Fact
> - PMI Batch Quality Fact
> - PMI Batch Resource Fact
> - PMI Margin
> - QC Assay Dimension
> - Routing Dimension
>
> You may safely ignore any warnings/errors you can get for these folders.

Transfer EDW Discoverer 4i Contents to Windows NT/2000/XP Client

Discoverer 4i EUL contents and workbooks are delivered as EEX files that are staged by AutoPatch in the $/AU_TOP/discover/<LANG> directory. It requires MKS Toolkit installed on the Discoverer 4i Administration Client machine.

To transfer EDW Discoverer 4i contents:

1. Choose one of the following methods to get access to Discoverer 4i EEX files:

   ■ Map your Oracle Applications AU_TOP to your Discoverer 4i Administration Client machine as a network drive and execute the *adupdeul.sh* script from the \discover directory on the mapped network drive.

   ■ Transfer $AU_TOP/discover directory and its contents (including subdirectories) to a temporary directory on your Discoverer 4i Administration Client machine and execute the *adupdeul.sh* script from the temporary directory.

   > **Important:** Ensure that the MKS Toolkit is installed on the Discoverer 4i Administration Client machine.

2. Load the EDW 4.2 Discoverer 4i contents into the EDW EUL by doing the following:

   a. Open an MS-DOS command prompt window.

   b. Change to the mounted directory / temporary directory where the $AU_TOP/discover directory contents are located.

   > **Important:** If you install EDW 4.2 as part of Oracle Applications Release 11i.10, execute the *adupdeul.sh* script in mode=complete. In this mode you should omit option driver=u.3295042.drv.

3. Import EDW 4.2 Discoverer 4i workbooks and extended EUL contents by executing the following command:

```
> sh adupdeul.sh connect="<APPS User>:<Valid Apps responsibility
name>"/<Apps user password>@<two_task> resp=<APPS responsibility name>
gwyuid=applsyspbub/pub fndnam=apps secgroup="Standard" topdir=<top level
directory where discoverer files are available> language=<comma separated
list of language codes> eulprefix=<EUL prefix (for ex: EDWEUL)> eultype=EDW
mode=driver exedir=<directory where discoverer executables are located>
driver=c3295042.drv logfile=adupdeul.log
```

For example:

```
d:\temp> sh adupdeul.sh connect="sysadmin:System
Administrator/sysadmin@apps115 resp="System Administrator"
gwyuid=applsyspub/pub fndnam=apps secgroup="Standard" topdir=d:/temp
language=us eulprefix=EDWEUL eultype=EDW mode=driver exedir=d:/orant/discvr4
driver=c3295042.drv logfile=d:/temp/adupdeul.log
```

4. Check adupdeul.log file for any errors.

Define Default Profile Options

After you have granted your users/responsibilities access to the workbooks, you must define default profile options.

To define default profile options:

1. Connect to your warehouse Oracle Applications with 'System Administrator' responsibility:

   a. Navigate to Profile > System.

   b. Choose the Responsibility button and select the Global Warehouse Administrator responsibility.

   c. Run query for Profile ICX:%.

2. For the ICX: Discoverer Default End User Layer Schema Prefix profile option, enter edweul at the responsibility level. Do not overwrite the EUL definition at the site level.

3. For the ICX: Discoverer EDW End User Layer Schema Prefix profile option, enter edweul at the responsibility level. Do not overwrite the EUL definition at the site level.

4. Perform steps 1 to 3 for each of the responsibilities below:

   - Financial Intelligence - Enterprise Data Warehouse

   - Manufacturing Intelligence - Enterprise Data Warehouse

   - Purchasing Intelligence - Enterprise Data Warehouse

   - Supply Chain Intelligence - Enterprise Data Warehouse

   - Human Resource Intelligence - Enterprise Data Warehouse

Backup Source Systems and Warehouse

Congratulations! You have successfully completed installing EDW.

Once you complete the installation, it is highly recommended that you backup the data on both your source and warehouse systems to ensure that you can always return to this fresh-install state. This step is optional.

3

Upgrade Tasks

This chapter describes how to upgrade and configure Oracle E-Business Intelligence Embedded Data Warehouse (EDW). This chapter covers the following topics.

- Overview of Upgrading EDW on page 3-2
- Back Up Source Systems and Warehouse on page 3-2
- Verify Prerequisites on page 3-3
- Upgrade Oracle Warehouse Builder Repository on page 3-5
- Upgrade Embedded Data Warehouse End User Layer (EUL) on page 3-18
- Configure Security on page 3-22
- Create OWB 9.2 Metadata Repository on page 3-22

Overview of Upgrading EDW

This chapter describes how to upgrade EDW from a previous release of EDW to release 4.2.

To avoid unexpected delays in the upgrade, please read through this entire section and familiarize yourself with the upgrade process before you begin.

> **Important:** It is highly recommended that this upgrade be performed by an Oracle Applications database administrator in cooperation with the implementation team.

The following table contains a checklist that you can use when upgrading EDW.

Table 3–1   Upgrade Steps

Step	Location	Task List
Back Up Source Systems and Warehouse on page 3-2	Source Systems Warehouse System	■ Back Up Source Systems and Warehouse
Verify Prerequisites on page 3-3	Source Systems Warehouse System Administration Client machines	■ Hardware Prerequisites ■ Software Prerequisites
Upgrade Oracle Warehouse Builder Repository on page 3-5	OWB 9i Administration Client machine Warehouse System	■ Install Oracle Warehouse Builder 9.2.0.4 ■ Upgrade OWB Repository from 9i (9.0.3) to 9i Release 2

Back Up Source Systems and Warehouse

Before you begin your upgrade of EDW, ensure that you back up your source and warehouse instances.

This back up step is optional, but it ensures that you can always return to your previous system state.

Verify Prerequisites

Before you begin to upgrade EDW, you must verify that all hardware and software prerequisites have been met.

This section contains the following topics.

- Hardware Prerequisites
- Software Prerequisites

Hardware Prerequisites

To successfully complete the install, you must have the following hardware available.

Source Systems

For information on hardware requirements for your 11i source systems, see the installation documentation for the respective system.

Warehouse

For the hardware requirements for the database, see *Oracle 8i(9i) Installation Guide.*

For the hardware requirements and supported platforms for Oracle Discoverer, see *Oracle Discoverer 4i Installation Guide* or *Oracle Discoverer 10g Installation Guide*.

Administrative Client

The Oracle Warehouse Builder Client requires one of the following Windows operating systems:

- Microsoft Windows NT 4.0 with Service Pack 6 or higher
- Microsoft Windows 2000
- Microsoft Windows XP Professional Edition

The Windows NT/2000/XP server should have at least 1 GB of RAM and 2 GB of space for installing the OWB Client and converting the OWB metadata repository. The Warehouse Builder Client 9.2 required Oracle 8.1.7 or Oracle 9i Database Server Release 1 or 2.

See: *Oracle 9i Warehouse Builder Installation and Configuration Guide Release 9.2.*

Software Prerequisites

To successfully complete the install, you must have the following software available on the source system and warehouse servers.

Source Systems

You must have one or more of the following standard source systems. For information on the standard install for each source system, see the appropriate installation documentation.

■ Oracle Applications Release 11i with patchset 3 or higher

You must also have the EDW Release 4.2 mini-pack, with the source patchset (11i.EWS.D) installed on each source system. For more information see *About Oracle Embedded Data Warehouse Release 4.2* on MetaLink.

Warehouse

You must have the following standard warehouse system. For information on the install for the warehouse system, see the appropriate installation documentation.

■ Oracle Applications Release 11i with patch set 3 or higher

You must also have the EDW Release 4.2 mini-pack, with the warehouse patchset (11i.EDW.D) installed on the warehouse system. For more information see *About Oracle Embedded Data Warehouse for Release 4.2* on MetaLink.

For RDBMS 8i only, update your `init.ora` parameter file with the following initialization parameters:

```
star_transformation_enabled = true
bitmap_merge_area_size = 1048576
create_bitmap_area_size = 8388608
```

The *bitmap_merge_area_size* and *create_bitmap_area_size* parameters should be set to their default values. The ranges of these values are operating system dependent.

Administrative Client

The following software must be installed on the Administrative Client.

■ Oracle 9i Warehouse Builder Client with Common Warehouse Metadata Transfer Wizard

■ Oracle Discoverer 4i Administration Edition Client (version 4.1.48)

- Oracle Discoverer 4i User Edition Client (version 4.1.48)

> **Note:** It is highly recommended to use separate Windows machines to install Oracle 9i Warehouse Builder Client software and Oracle Discoverer 4i Clients. In all cases Windows machines with either OWB or Discoverer software installed will be referred as *Administrative Client* throughout this document.

Upgrade Oracle Warehouse Builder Repository

> **Important:** *EDW Release 4.2 is certified with OWB Repository 9i Release 2 only.*

If you are upgrading from a version of EDW with OWB 2.1.1, see: Migrate OWB Repository from 2.1.1 to 9i Release 2 on page 3-6

If you are upgrading from EDW Release 4.0 or higher, with OWB 9i, see: Upgrade OWB Repository from 9i (9.0.3) to 9i Release 2 on page 3-11

Install Oracle Warehouse Builder 9.2.0.4

To install Oracle Warehouse Builder 9.2:

1. Obtain the Oracle 9i Warehouse Builder 9.2.0.8 CD (Part Number B11781-01).

2. Install Oracle 9i Warehouse Builder Client on the OWB Administrative Client. For information on how to install the OWB client, see: *Oracle 9i Warehouse Builder Installation and Configuration Guide Release 9.2.*

> **Note:** The OWB Administrative Client machine must have at least 1 GB of RAM and 2 GB of virtual memory. Allocate 400 MB of diskspace for the EDW EUL EEX file. For detailed hardware requirements, see: Hardware Prerequisites on page 3-3.

3. Apply the mandatory OWB9.2 Client patch 3455473.

    a. Download patch 3455473 from Metalink into a temporary directory on your Windows OWB Administrative Client machine.

    b. Follow the instructions in the readme.txt file located in the uncompressed patch directory to apply the patch to your OWB9.2 Client.

4. After completing the OWB client install, execute teh EDW_Config.bat script located in <OWB9.2 Home>\owb\bin\win32 on the OWB Administrative Client machine. This script requires the command line argument <OWB9.2 Home>:

```
<Drive>:\<OWB9.2 Home>\owb\bin\win32\EDW_Config.bat <OWB9.2 Home>
```

For example:

```
D:\>d:\OWB92\owb\bin\win32\EDW_Config.bat D:\OWB92
```

Migrate OWB Repository from 2.1.1 to 9i Release 2

Perform this step only if you are upgrading from EDW Release 3.1, 3.2, or 4.0 with OWB Repository 2.1.1. You do not need to perform this step if you already use OWB Repository 9i (9.0.3).

> **Additional Information:** For more information on how to install the OWB client and repository, see: *Oracle Warehouse Builder Installation Guide Release 9i.*

1. Backup your current OWB 2.1.1 Repository schema. Use the standard Oracle export utility located on the Database Tier.

For example:

```
exp system/manager@tst115 owner=edwrep buffer=2000000
file=edwrep_owb211.dmp log=edwrep_owb211_exp.log
```

> **Additional Information:** For more information on how to use the export utility see: *Oracle System Administrator's Guide.*

2. Backup the EDW security metadata tables using the standard Oracle export utility located on the Database Tier.

For example:

```
exp system/manager@tst115 tables=(BIS.EDW_SEC_DIM_INFO_T,
BIS.EDW_SEC_LVL_INFO_T, BIS.ED_SEC_FACT_INFO_T,
```

```
BIS.EDW_SEC_REF_INFO_T, BIS.EDW_SEC_DIM_ACCESS) rows=Y
buffer=2000000 file=bis_sec211.dmp log=bis_sec211.log
```

3. Upload the latest metadata into the current OWB 2.1.1 Repository schema. On the OWB Administrative Client machine, download patch 3566146 from Metalink into a temporary directory and uncompress the patch. Follow the instructions in the readme.txt file supplied with the patch, to upload metadata into OWB 2.1.1 Repository schema.

4. Convert the current OWB 2.1.1 Repository Metadata into OWB 9i Metadata format.

   a. Download the patch 2430213 from Metalink. Create the subdirectory 'upgrade' under <OWB9.2 Home>\owb directory and uncompresses the patch archive contents into 'upgrade' subdirectory.

   b. Open the command line window and change to the <OWB9.2 Home>\owb\upgrade directory.

   c. Execute the script make9i.bat with the argument '-new parfile.txt' to generate a template parameter file:

     For example:

```
D:\>cd\OWB92\owb\upgrade
D:\OWB92\owb\upgrade\> make9i.bat -new parfile.txt
```

   d. Open the generated parameter file parfile.txt and update it with your local settings. Refer to Table 3–2, "OWB 2.1.1 to 9i Conversion Parameters" for settings details.

Table 3–2   OWB 2.1.1 to 9i Conversion Parameters

Parameter Name	Parameter Description	Notes
username	OWB Repository schema name: EDWREP	The name EDWREP is mandatory and should not be changed
password	OWB Repository schema password	
host	Name of the database server where OWB Repository database installed	
sid	OWB Repository database instance name	
port	TNS listener port number for OWB database instance	

Parameter Name	Parameter Description	Notes
tns	TNS alias of the OWB database instance	Make sure you have the valid TNS entry in your TNSNAMES.ora file on the Windows NT/2000 OWB9i tier where you plan to convert the metadata.
tmp dir	Full path of the directory where the batch scripts installed	<OWB92 HOME>\owb\upgrade
owb bin dir	Full path of the directory where the migration utilities installed	<OWB92 HOME>\owb\bin\win32
211 bin dir	Full path of OWB 2.1.1 metadata extraction utilities	<OWB211>\owb\wbapp

---

Note: The generated 'parfile.txt' will contain the line "No spaces after > please ". This line does not affect the migration process and could be safely ignored or deleted from 'parfile.txt'.

The sample contents of the generated parfile.txt are below

```
No spaces after > please
username>edwrep
password>edwrep
host>ap301sun
sid>tst115
port>1527
tns alias>tst115
temp dir>d:\owb903\owb\upgrade
owb bin dir>d:\owb903\owb\bin\win32
211 bin dir>d:\owb21134\owb\wbapp
```

e. Modify the java virtual machine memory size parameter in the data conversion startup script. Open the file <OWB92 HOME>\owb\bin\win32\mdlconvert.bat and set the parameter '-Xmx' to '800M' (i.e. '-Xmx800M').

> **Note:** Make sure you have Oracle SQL*PLUS installed on OWB9i Client server and you are able to connect successfully to Embedded Data Warehouse Instance using SQL*PLUS.

f. Execute *make9i.bat* script with the argument 'parfile.txt'. It will convert the repository metadata and extract it into the metadata files staged in the temporary directory defined in *parfile.txt*:

For example:

```
d:\OWB903\owb\upgrade\> make9i.bat parfile.txt > make9i.log
```

> **Note:** It takes approximately 4 hours to complete this step. The actual time may vary depending on processor speed and RAM available on your OWB9i tier.

5. Drop the current OWB 2.1.1 Repository schema.

> **Note:** Complete this step ONLY after you successfully completed all the steps listed above.

Connect to the database system account and drop the 2.1.1 Repository schema EDWREP:

For example:

```
SQL> drop user edwrep cascade;
```

6. Create a new OWB9.2 Repository using Oracle9.2 Warehouse Builder Repository Assistant.

   See: Create OWB 9.2 Metadata Repository on page 3-22.

7. Import the converted metadata files into the newly created OWB9.2 Repository.

   a. Execute the import script *<OWB92 Home>\owb\upgrade\imp9i.bat* with the argument 'parfile.txt'.

      Note: Make sure you have at least 500 MB of free space available in Repository schema (EDWREP) default tablespace and enough rollback tablespace space /rollback segments for the metadata import.

      For example:

      ```
      D:\OWB903\owb\upgrade\> imp9i.bat parfile.txt > imp9i.log
      ```

8. Verify that you have successfully converted your 2.1.1 Repository to a OWB 9.2 Repository.

9. Apply the interoperability patch 2360757 on the warehouse instance.

   a. Back up the the OWB9i Repository:

      For Example:

      ```
      exp edwrep/edwrep@apps115 buffer=2000000
      file=/d2/stage/owb9i.dmp grants=N INDEXES=N
      CONSTRAINTS=N LOG=/d2/stage/owb9i_imp.log
      TABLES=CMPALLCLASSES,CMPALLFOLDERFCONAMES
      ```

      Important: The OWB9i Repository schema EDWREP is registered as an External schema for Oracle Applications in EDW 4.2.

   b. Execute the FNDCPASS command on the administration tier to propagate the EDWREP password into the Warehouse instance. The password must be the same as EDWREP password used during OWB Repository creation (step g on page 3-16)::

      ```
      FNDCPASS apps/<apps password> 0 Y system/<system password> ORACLE edwrep
      <edwrep password>
      ```

For Example:

```
FNDCPASS apps/apps 0 Y system/manager ORACLE edwrep edwrep
```

c. Apply patch 2360757 to your warehouse instance.

Use AutoPatch to apply the patch drivers in the following order (if they exist):

– c2360757.drv (on all servers)

– d2360757.drv (on administration server only)

– g2360757.drv (on all servers)

10. Download patch 3566149 from Oracle*MetaLink* on to the OWB Administrative client machine. Uncompress the patch into a temporary directory and follow the instructions in the readme.txt file to apply the patch to OWB 9.2 metadata repository.

11. Download patch 3566152 from Oracle*MetaLink* on to the OWB Administrative Client machine. Uncompress the patch into a temporary directory and follow the instructions in the readme.txt file to apply the patch to OWB 9.2 metadata repository.

12. Refresh EDW OWB 9.2 metadata table layer by doing the following:

a. Log into Oracle Applications Warehouse and select "Global Warehouse Administrator" responsibility.

b. Navigate to Requests => Submit New Request => Refresh EDW metadata.

c. Choose the Submit button.

Your OWB Metadata Repository migration is complete. Proceed to Create the EDW EUL and Import EDW Workbooks on page 2-21.

Upgrade OWB Repository from 9i (9.0.3) to 9i Release 2

Perform this step only if you are upgrading from EDW Release 4.0 or higher with OWB Repository 9i (9.0.3). You do not need to perform this step if you already use OWB Repository 9i (9.0.3). Skip this step if you migrated OWB Repository from 2.1.1 to 9.2.

To upgrade the OWB 9i Repository, do the following:

1. Backup the OWB 9.0.3 Repository

   For example:

   ```
   exp edwrep/edwrep@apps115 buffer=2000000
   file=/d2/stage/owb903.dmp grants=N INDEXES=N CONSTRAINTS=N
   LOG=/d2/stage/owb903_imp.log TABLES=CMOALLFOLDERCONAMES
   ```

2. Apply patch 2992954 to your warehouse instance.

   Use AutoPatch to apply the patch drivers in the following order (if they exist):

   – c2992954.drv (on all servers)

   – d2992954.drv (on administration server only)

   – g2992954.drv (on all servers)

3. You only need to perform this step if you are upgrading from EDW Release 4.0 with OWB Repository 9.0.3. Skip this step if you are upgrading from EDW 4.1.

   Download patch 3566149 from Oracle*MetaLink* on to the OWB Administrative Client machine. Uncompress the patch into a separate temporary directory and follow the instructions in the readme.txt file to apply the patch to OWB 9.2 metadata repository.

4. Download patch 3566152 from Oracle*MetaLink* on to the OWB Administrative Client machine. Uncompress the patch into a separate temporary directory and follow the instructions in the readme.txt file to apply the patch to OWB 9.2 metadata repository.

5. Export OWB 9.0.3 Metadata into file.

   a. Start OWB 9.0.3 on the Administrative Client. The Warehouse Builder Logon window appears.

Figure 3–1   Warehouse Builder Logon window

b. Enter the OWB Repository schema password and choose Connection Info . . . button. The Connect Information window appears.

Figure 3–2   Connect Information window

c. Enter host name, database listener port and Oracle SID of the Warehouse system. Click OK to go back to the Logon window and click Logon. The Select a project to open window appears.

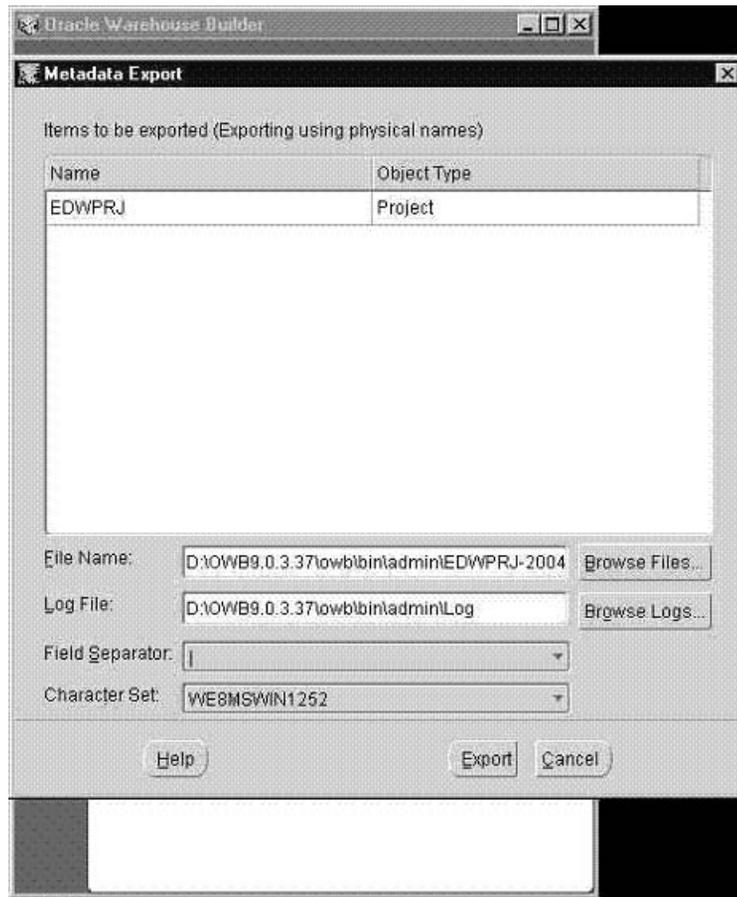*Figure 3–3   Select a Project*

d.   Select the EDWPRJ project from the list of available projects and click OK. The EDWPRJ project window appears.

Figure 3–4   EDWPRJ project window
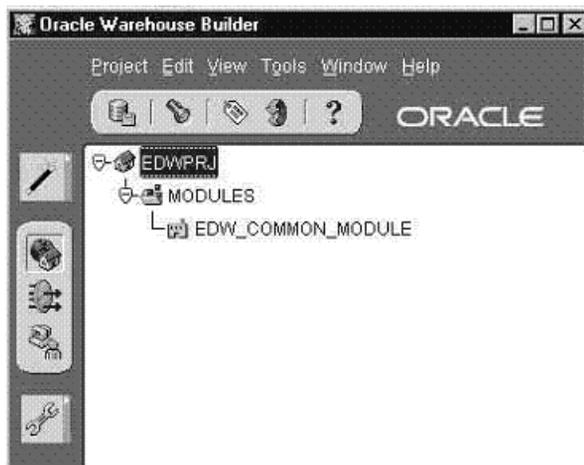
e.   In top menu item Project, select MetaData Export -> File. The Metadata Export Window appears.

Figure 3–5   Metadata Export Window

f. Provide full name of the file where exported metadata will be stored, and location of a log file. Choose Export button. After export finishes check log file for error messages.

6. Drop the current OWB 9.0.3 Repository schema.

> **Important:** Complete step 6 only after you successfully completed all the steps listed above

Connect to the database system account and drop the 9.03 Repository schema EDWREP.

For example:

```
SQL> drop user edwrep cascade;
```

7. Create new OWB9i Repository using Oracle 9.2 Warehouse Builder Repository.

    See: Create OWB 9.2 Metadata Repository on page 3-22.

8. Import extracted OWB 9.0.3 metadata into the new OWB 9.2 Repository.

    a. Start the OWB 9.2 Administrative Client. The Warehouse Builder Logon window appears.

    b. Enter OWB Repository schema password and choose Connection Info . . . . The Connect Information window appears.

    c. Enter the host name, database listener port, and Oracle SID of the Warehouse system. Choose OK to go back to the Logon Window and press Logon. List of available OWB projects will appear. Select EDWPRJ project from the list.

    d. In top menu item Project, select MetaData Import -> File. The Metadata Import Utility Window appears.

Figure 3–6 Metadata Import Utility Window
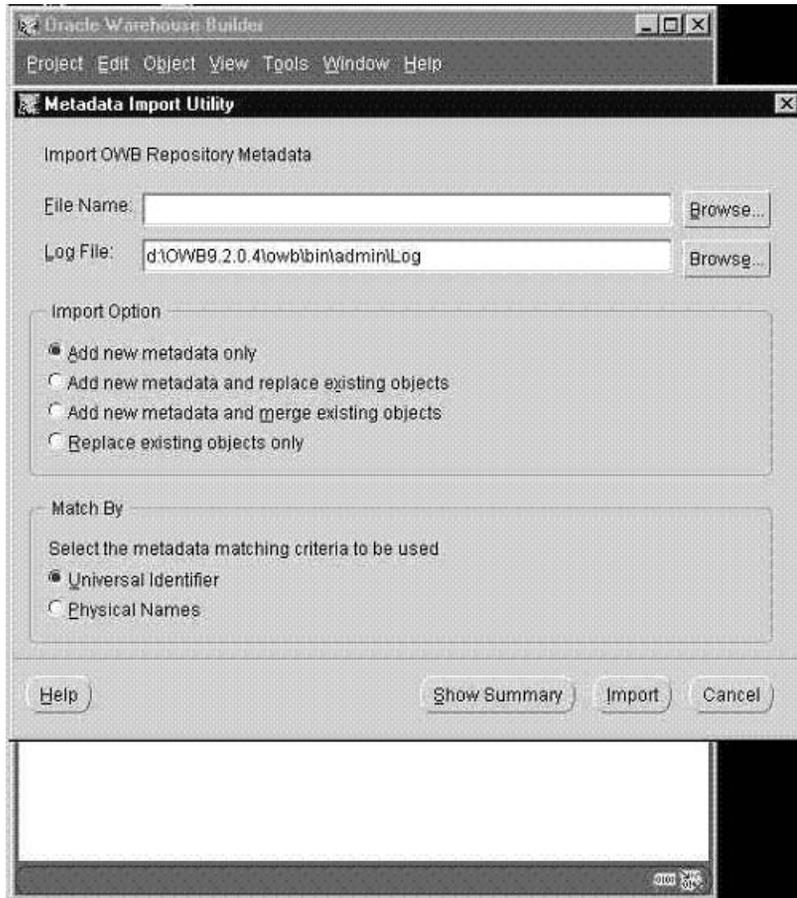
e. Enter the name of the extracted OWB 9.0.3 metadata file. Ensure that the Import Option and Match By parameters are selected as shown. Choose Import. After the import is complete, check the log file for error messages.

9. Apply the interoperability patch 2360757 on the warehouse instance.

a. Back up the OWB 9.2 Repository

For example:

```
exp  edwrep/edwrep@apps115 buffer=2000000
file=/d2/stage/owb92.dmp grants=N INDEXES=N
CONTRATINST=N LOG=/d2/stage/owb92_imp.log
```

```
TABLES=CMPALLCLASSES, FCOFOLDERNAMESPACE
```

> **Important:** The OWB9i Repository schema EDWREP is registered as an external schema for Oracle Applications in EDW 4.2.

    b. Execute the FNDCPASS command on the administration tier to propagate the EDWREP password into the Warehouse instance. The password must be the same as EDWREP password used during OWB Repository creation.

```
FNDCPASS apps/<apps password> 0 Y system/<system password> ORACLE
edwrep<edwrep password>
```

    For example:

```
FNDCPASS apps/apps 0 Y system/manager ORACLE edwrep edwrep
```

    c. Apply patch 2360757 to your warehouse instance. Use AutoPatch to apply the patch drivers in the following order (if they exist):

      – c2360757.drv (on all servers)

      – d2360757.drv (on administation server only)

      – g2360757.drv (on all servers)

10. Refresh EDW OWB 9.2 metadata table layer by doing the following:

    a. Log into Oracle Applications Warehouse and select "Global Warehouse Administrator" responsibility.

    b. Navigate to Requests => Submit New Request => Refresh EDW metadata. Choose the Submit button.

Your OWB Metadata Repository upgrade is complete.

Upgrade Embedded Data Warehouse End User Layer (EUL)

If you are upgrading from EDW Release 3.x with OWB 2.1.1 or from EDW Release 4.0 with OWB 2.1.1, you must first *convert* your EDW EUL and then upgrade your custom workbooks.

If you are upgrading from EDW Release 4.x with OWB 9i you must first *upgrade* your EDW EUL and then upgrade your custom workbooks.

> **Important:** If you created any custom workbooks make sure you preserve all the customizations before you proceed with EUL upgrade.

Convert EDW EUL

Convert the EDW EUL only if you are upgrading from EDW Release 3.x with OWB 2.1.1 or from EDW Release 4.0 with OWB 2.1.1.

1. Make sure you have at least 400 MB of temporary space and 600 MB of free disk space on both OWB9.2 and Discoverer 4i Administrative Client machines.

2. Create separate folder named 'upgrade', in <OWB9.2_HOME>\owb folder on the OWB9.2 Administrative Client.

3. Download patch 2430213 from Oracle*MetaLink* and uncompress it into your <OWB9.2_HOME>\owb\upgrade folder on OWB9.2 Administrative Client.

4. Change your working directory to <OWB9.2_HOME>\owb\upgrade and update the generate_eex.bat and update_EUL.bat files where appropriate, with the actual values provided in the table below.

Table 3–3 Actual Values

Parameter Name	Description	Example
ORAINSTALL	ORACLE_HOME directory on Discoverer 4i Administrative Client machine	D:\orant
OWBINSTALL	The folder where OWB9i software is installed (referred to as <OWB9.2_HOME> in this document)	D:\OWB92
DISCO_ID	Discoverer EUL schema name	EDWEUL_US
DISCO_PASSWD	Password of Discoverer EDW EUL schema	edweul
SCHEMA_OWNER	Database schema which owns the EDW Discoverer EUL (Oracle Applications schema)	APPS
DISCOINSTALL	The directory where Discoverer 4i is installed	D:\ORANT\DISCVR4
DISCOHOST	TNS alias of the EDW database which hosts Discoverer 4i EDW EUL	tst115

Table 3–3   Actual Values

Parameter Name	Description	Example
DISCO_FILE	Predefined EEX file name	edweul.eex
OWB_PROJECT	EDW OWB Project Name	EDWPRJ
OMTST_OWB_CONNECT_FULL	OWB9.2 specific EDW Repository connect string	String format: username/password @host:port:sid

Below is an example of generate_eex.bat file settings:

```
@set ORAINSTALL=d:\orant
@set OWB_PROJECT="EDWPRJ"
@set OMTST_OWB_CONNECT_FULL=edwrep/edwrep@ap301sun:1521:tst115
@set DISCO_ID=EDWEUL_US
@set DISCO_PASSWD=EDWEUL_US
@set SCHEMA_OWNER=APPS
```

5. Generate an eex file.

   a. a.Log into OWB9.2 Administrative Client machine.

   b. b.Execute the <OWB9.2_HOME>\owb\upgrade\generate_eex.bat script

      For example:

      ```
      C:\> cd \OWB92\owb\upgrade
      C:\OWB92\owb\upgrade\> generate_eex.bat
      ```

   c. Check the log files for any errors.

6. Update the EDW EUL.

   a. Log into the Discoverer 4i Administrative Client machine.

   b. Copy the <OWB9.2_HOME>\owb\upgrade directory and generated eex file from the OWB9.2 Administrative Client machine into a temporary directory on the Discoverer 4i Administrative Client machine.

.

Important: If you have installed both OWB 9.2 and Discoverer 4i software on the same machine you don't need to perform the previous step. You will use <OWB9.2_HOME>\owb\upgrade directory to perform the steps c and d.

---

c. Execute the update_EUL.bat script.

For example, if Discoverer 4i is installed on a separate machine:

```
C:\> cd \TEMP\UPGRADE
C:\TEMP\UPGRADE\> update_EUL.bat
```

For example, if Discoverer 4i and OWB9i are installed on the same machine:

```
C:\> cd \OWB903\owb\UPGRADE
C:\\OWB903\owb\UPGRADE\> update_EUL.bat
```

d. Check the log files for errors.

Upgrade EDW EUL

Upgrade the EDW EUL only if you are upgrading from EDW Release 4.x / OWB 9i (9.0.3).

1. Generate the EDW EUL EEX as follows:

a. Log into the OWB Administrative Client machine and run OWB as an owner of the EDW OWB repository schema. For example, EDWREP/EDWREP@TST115.

b. Select project named EDWPRJ from the list of available projects.

c. From the Projects menu, choose Metadata Export > Bridge. The CWM Transfer Wizard appears. Configure the wizard to generate the EDW EUL. When using the wizard, ensure that "Oracle Discoverer" is the selected target product on "Metadata Source and Target Identification" window and that the following values are provided for the "CWM Transfer Parameters" window.

2. Import the EEX file as follows:

a. Copy the edweul.eex file to the Discoverer4i Administration Client machine.

b. Run Discoverer Administration Client and connect as the EUL owner. For example, EDWEUL_US.

c. Choose Import from the File menu.

d. Choose edweul.eex from the list of values and choose Add.

e. Ensure that you select the Import option shown in Figure 3-xx, "Oracle Discoverer 4i End User Layer Import Parameters".

     f.   Choose Start. The import process begins.

     g.   After the import is over, click the Finish button and wait until SQL regeneration is done.

Upgrade Custom Workbooks

If you have any custom workbooks, upgrade them after you convert or upgrade the EDW EUL.

1. Log into the Discoverer 4i Administrative Client machine.

2. Start Discoverer 4i User Edition and open a custom workbook.

3. Validate the custom workbook by name.

4. Save the workbook in the database.

5. Repeat steps 1 through 4 for each custom workbook.

Configure Security

Configure security for your workbooks by completing the following steps.

■ Grant Users/Responsibilities Access to Business Areas on page 2-29

■ Transfer EDW Discoverer 4i Contents to Windows NT/2000/XP Client on page 2-30

Create OWB 9.2 Metadata Repository

This section describes how to create a new OWB9.2 Repository using Oracle 9.2 Warehouse Builder Repository Assistant.

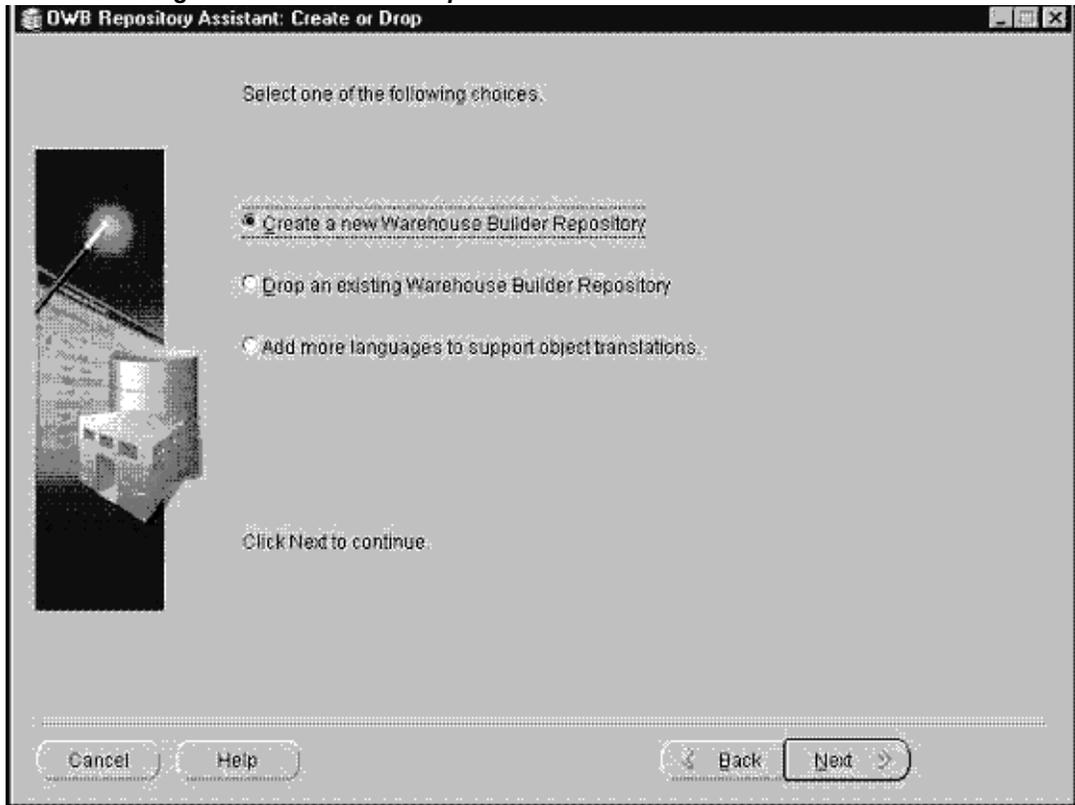1. Start the Oracle Warehouse Builder Repository Assistant.

Figure 3–7   Welcome window

2. Click Next. The Server and SYSDBA Information window appears.
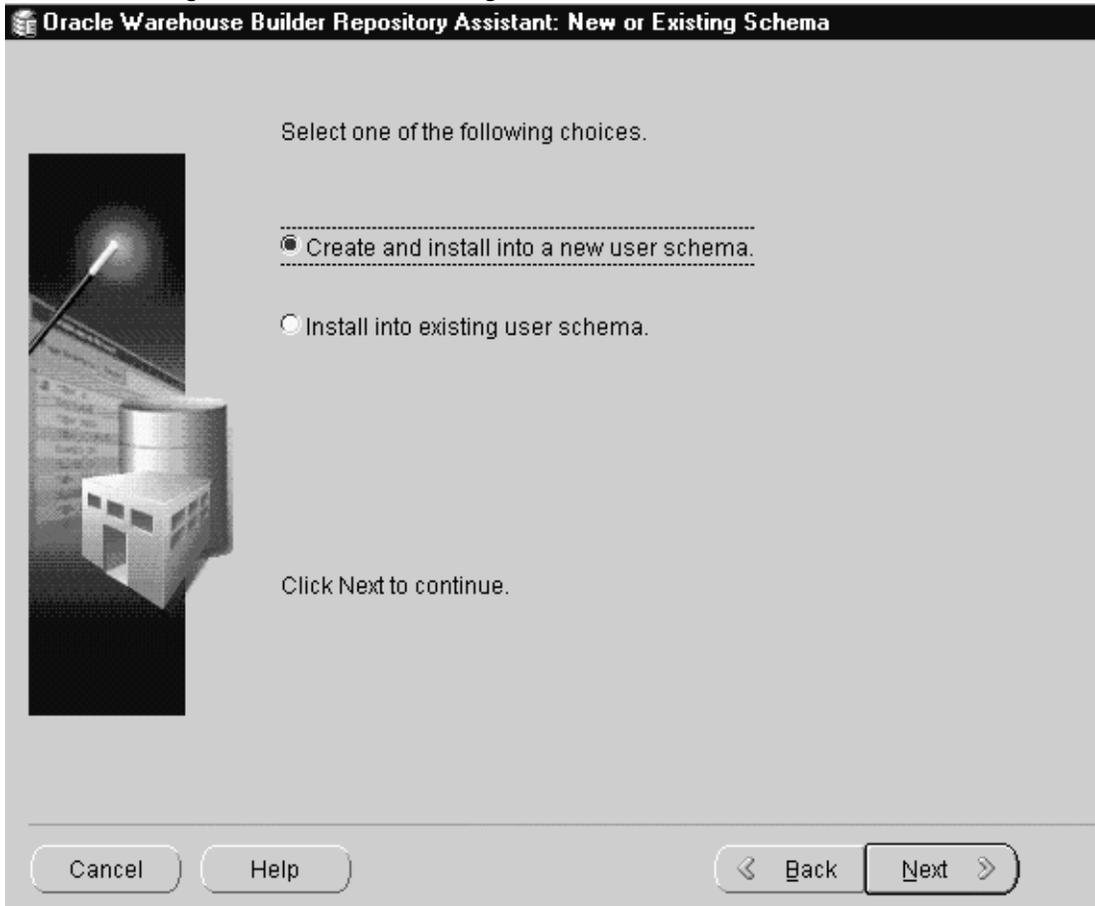
Figure 3–8   Server and SYSDBA window
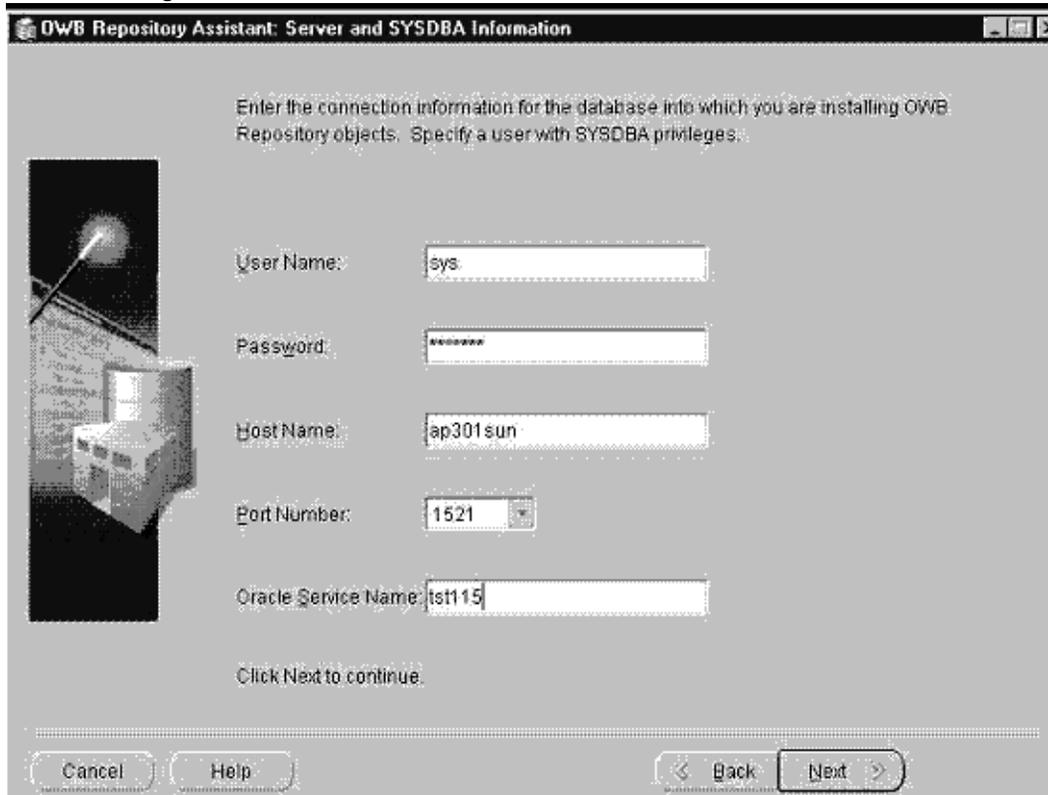

3. Click Next. The Create or Drop window appears.

Figure 3–9   Create or Drop window

4. Choose the Create a new Warehouse Builder Repository option and click Next. The New or Existing Schema window appears.

Figure 3–10   New or Existing Schema window

5. Choose the "Create and install into new user schema" option and click Next. The Username and Password (New) window appears.

Figure 3–11   User Name and Password (New) window
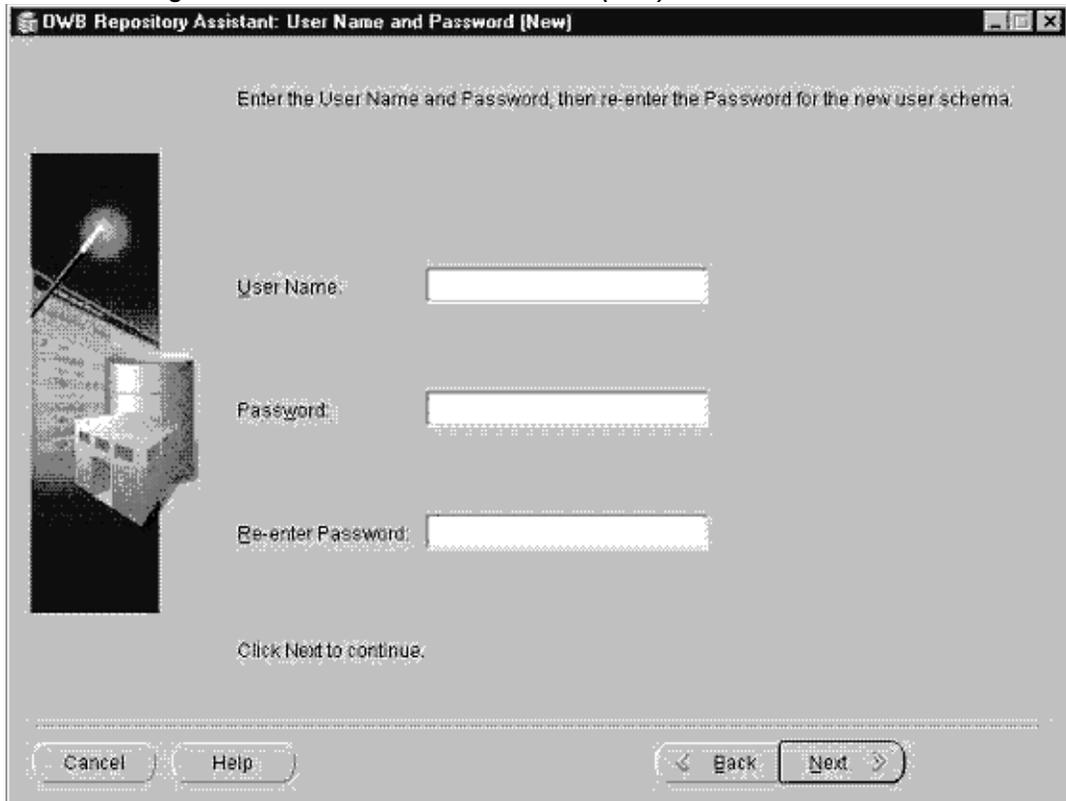
6. Enter the following information:

User Name: edwrep

Password: <edwrep user password>

Click Next. The Tablespace window appears.

**Figure 3–12 Tablespace window**

7. Chose the default data tablespace for EDWREP database schema from the "Select the tablespace for data" list of values.

8. Chose the default index tablespace for EDWREP database schema from the "Select the tablespace for indexes" list of values.

9. Chose the temporary tablespace for EDWREP database schema from the "Select the tablespace for temporary data" list of values.

10. Chose the default tablespace for snapshots for EDWREP database schema from the "Select the tablespace for snapshots" list of values. Click the Next button to continue. The Define Languages window appears.

Figure 3–13   Define Languages window
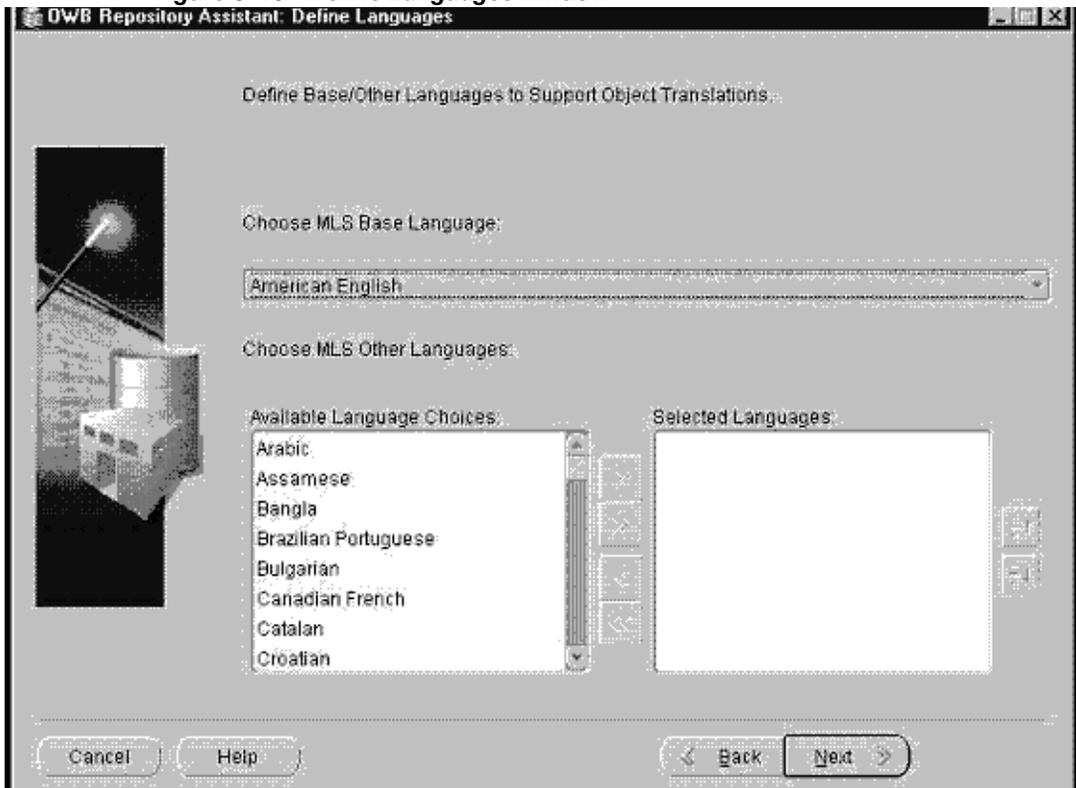
11. Choose "American English" from the "Choose MLS base language" list of values. Click Next to continue. The Summary window appears.

Figure 3–14   Summary window
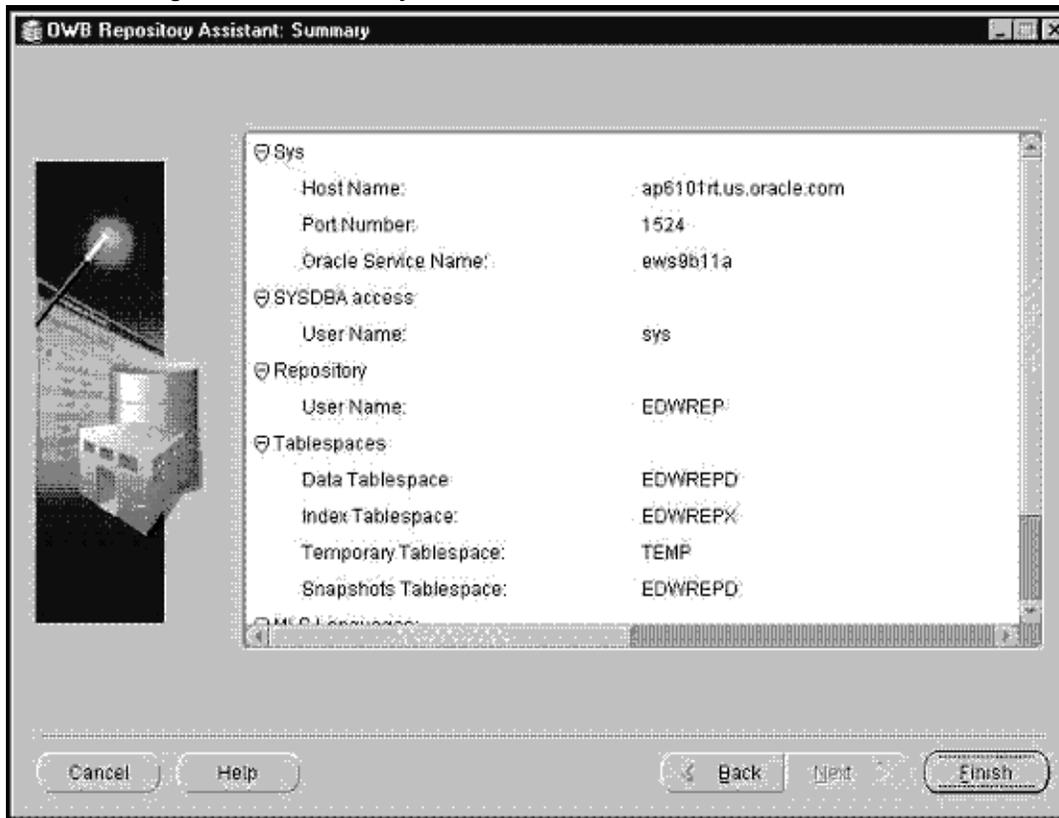
12. The Summary window contains a list of all the selections you have made. Verify that the OWB repository setup information is correct.

   a. If the setup information is incorrect, click the Back button until you reach the appropriate screen and re-enter the correct values. Click the Next button repeatedly until you return to the Summary window.

   b. If the set up information is correct, choose the Finish button. The Embedded Data Warehouse schema is created and installed in your warehouse.

   Your new OWB 9.2 Metadata Repository is now installed.