

Oracle Cloud Applications

Oracle Transactional Business Intelligence BI Catalog Folder Management

Release 11+

ORACLE WHITE PAPER | November 2017



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Introduction

Folders are ways to organize analyses, dashboards and reports in the BI catalog. Customers can add, move and delete a folder, set folder permissions, archive and unarchive folders. Without taking caution, moving or deleting a folder can have major impact on contents of the BI catalog. This white paper provides the best practices for working with BI catalog folders, and suggestions on actions for accidental move or deletion of a folder.

Who can Create Delete and Move folders?

A user with BI Administrator role has full access to the BI catalog and can add, delete and move a folder and set folder permissions. A BI Author can add, delete and move a folder in the catalog structure that he/she has access to.

A user with BI Consumer role has no privilege to create folders or reports. When granting the BI Administrator and BI Author privileges, the BI administrator must carefully evaluate the user privilege and the folder permission settings to prevent unintended folder deletion or relocation that could cause existing reports and dashboards to fail.

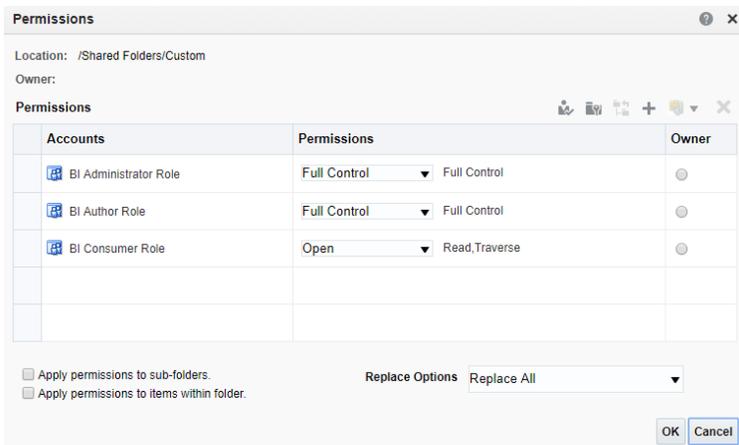
Where to Create Customer Folders?

It is recommended that customers store custom-built reports and dashboards in a custom root folder under the /Shared Folders/Custom folder e.g. /Shared Folders/Custom/CompanyA. Any analyses, reports, dashboards or other reporting objects stored in the /Custom folder are preserved during release patching and upgrades.

Customers are strongly advised not to modify contents in the delivered BI Catalog structure, e.g. /Human Capital Management or /Financials as the delivered BI catalog structure and objects may get removed or overwritten during release patching and upgrades. Customers should also periodically back up the custom BI catalog folder and store the archived catalog file offline for quick catalog restore.

Setting Folder Permission

To prevent unauthorized or accidental deletion of BI catalog folders, administrators need to be very careful in who is granted BI Administrator access and how to set the folder permissions. If a BI Author is granted 'Full Control' to a folder, the author can potentially delete or move this folder and its content.



To set folder permissions:

1. In the catalog, select the folder or object.
2. In the Tasks pane click Permissions.
3. In the Permissions dialog box, the owner and any other users, roles, or groups with permissions are listed in the Permissions list. To add a user or role, click Add users/roles in the toolbar and search for users or roles to add them to the Selected Members list in the Add Application Roles, Catalog Groups and Users dialog box. To delete a user or role, select the account or role in the Permissions list and click Delete selected users/roles.

4. In the Permissions list, to set ownership for a user, select Custom in the Permissions drop-down list for the account, then select Set Ownership in the Custom Permissions dialog box and click OK. You can also select the Owner option for the user or role.
5. Use the Permissions drop-down list to set permissions for the object. Object permissions vary by object.
6. Use the Apply permissions to sub-folders option to assign permissions to the folder's subfolders, and the Apply permissions to items within a folder to assign them to objects in the folder but not to subfolders.

The procedure of setting Folder Permission is documented in the 'Managing Folders' section of OTBI Help: [Creating and Administering Analytics and Reports \(Chapter 7 Analytics and Reports Management – Managing Folders\)](#)

Moving Analyses, Reports and Dashboard Objects – Using Archive & Unarchive process

It is recommended that customers use the Archive and Unarchive options to move folders and their content between environments. Archive gives customers the option to preserve the folder permissions and Unarchive allows the customer to either restore the archived permissions or create new folder permissions.

To create an archive file:

1. Locate the object in the catalog.
2. Select **More** and then select **Archive**.
3. In the Archive dialog box, select one or more of the following options:
 - **Keep Permissions:** Maintain the object or folder's existing permissions. If you do not select this option, then the archiving process does not include any permissions. Upon unarchiving, the parent folder's permissions are assigned to all of the objects and folders.
 - **Keep Time stamps:** Maintain the Creation Time, Last Modified, and Last Accessed times assigned to the object or folder. Upon unarchiving, the LastModified time is updated to indicate the time at which the object or folder is unarchived. If you select this option, the Old option in the Paste Overview area of the Preferences dialog box is available when unarchiving. You use the Old option to overwrite existing catalog items that are older than the catalog items in the archive.
 - If you do not select this option, then the archiving process does not include time information and the Old option in the Paste Overview area of the Preferences dialog box is not available.
4. Click **OK** to download the archive file.

Moving a File to a New Location

To unarchive a file:

1. Select the folder in the catalog where you want to upload the archived file.
2. In the **Tasks** pane click **Unarchive**.
3. In the Unarchive dialog box, browse for and select the archive file.
4. Use the Replace option to specify whether to replace an existing folder or object with the same name.
 - **All:** Select this option to replace any existing folders or objects with the same names as folders or objects included in the archive file that you are uploading.
 - **Old:** Select this option to replace folders or objects except those folders or objects that exist, unless they are older than the source.

- None: Select this option to add any new folders or objects, but preserve any existing folders or objects.
 - Force: Select this option to add and replace all folders or objects.
5. Use the ACL option to specify how the folders or objects are assigned permissions using Access Control Lists (ACLs) when unarchived.
 - Inherit: Inherits the folder or object's permissions (ACL) from its new parent folder.
 - Preserve: Preserves the folder or object's permissions (ACL) as it was in the original, mapping accounts as necessary.
 - Create: Preserves the folder or object's permissions (ACL) as it was in the original, creating and mapping accounts as necessary.
 6. Click **OK**.

The procedure of using Archive and Unarchive to move folders is documented in the 'Moving Analyses and Reports' section of OTBI Help: [Creating and Administering Analytics and Reports \(Chapter 7 Analytics and Reports Management - Moving Analyses and Reports\)](#)

Ramifications of Moving Folders

With read/write access, a user can move folders manually. When moving a folder, the user needs to understand the ramification of relocating a folder as the folder location path is stored in the definition of action link navigation and dashboard components. **When a folder is moved, it changes the folder path and this can cause analyses, reports, dashboards and action links that reference that folder path to fail.**

With Archive/Unarchive, if the archived catalog is unarchived to a target folder that is different from the original folder structure that the catalog is archived from, the old folder path reference could cause the unarchived analyses and dashboards to fail. In this case, the user needs to either unarchive to the same folder structure or modify the unarchived dashboards or action links to point to the new folder path.

Accidentally Moving or Deleting a Folder

If a user accidentally moves a critical folder, e.g. moves /Custom folder to the user's private /My Folders, the user should let the folder Move operation complete and then if possible, move the /Custom folder back to its original location. The user should not attempt to cancel the Move operation in process as this could corrupt the BI catalog. If the Move operation can't be reversed, the customer should call Oracle Support to request a BI Catalog restore.

In case of such an accidental operation, the following options are available and recommended for recovery:

- If the custom folder exists in another environment, customers can use Archive/Unarchive to restore the deleted folder from another environment. Please follow the steps listed in the "Moving Analyses, Reports and Dashboard Objects – Using Archive & Unarchive process" section of this document.
- If customers have an offline copy of the archived catalog file, customers use Unarchive to restore the deleted folder from the archived catalog file. Please follow the steps listed in the "Moving Analyses, Reports and Dashboard Objects – Using Archive & Unarchive process" section of this document.
- If above two options are not available, the administrator should immediately call Oracle Support to log a SR to request a BI Catalog restore.
- If a user accidentally moves a folder without knowledge of its original location, the user should contact his/her BI administrator and the folder owner to verify the original folder location before attempting to restore the folder to the shared catalog.





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