



This Armstrong-Smith Consulting white paper contains the following:

- Exporting and importing workbooks in version 4 of Oracle Discoverer
- It primarily shows you how to do this migration using Apps mode but can easily be adjusted for non Apps mode EULs.

Section 1 – Migration methods

There are two ways to migrate workbooks from one environment to another: using Discoverer Desktop and using Discoverer Administrator

Section 2 – Migrating using Discoverer Desktop

1. End Users, Library Managers and Report Writers need to have access to the Desktop edition
2. Using Desktop, end users, library managers and report writers can save workbooks to and open workbooks from the file system
3. Sharing rights are not exported when using Desktop. Any workbook that is migrated using this method must have its Sharing rights re-established
4. The main advantage of using this method is that Administration privileges do not need to be granted to the workbook owner

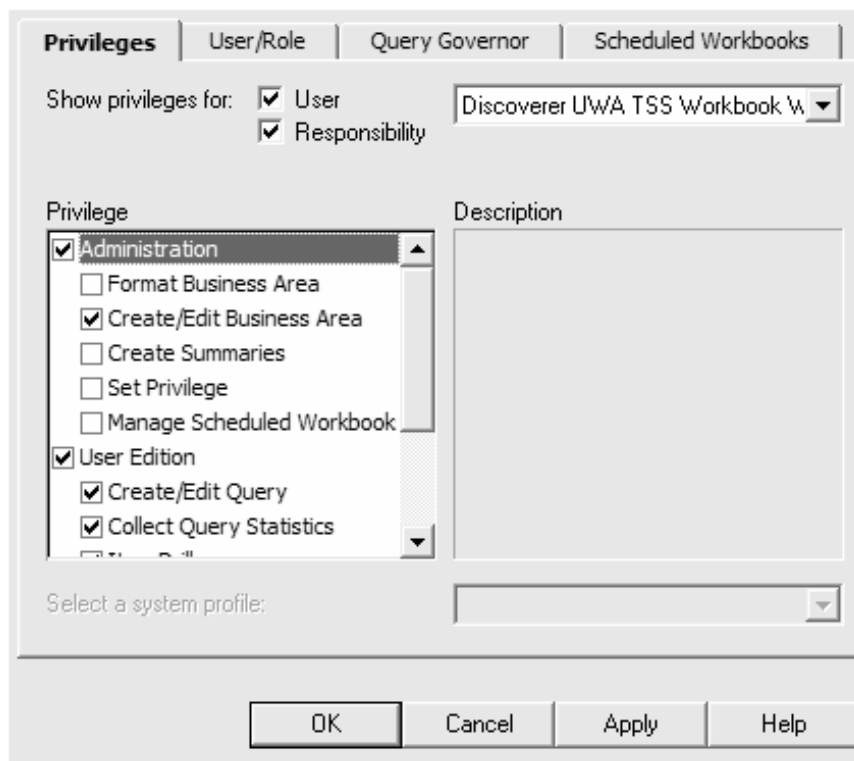
Section 3 – Migrating using Discoverer Administrator

1. Before migrating using Administrator all Responsibilities must be synchronized. Discoverer does not copy a Responsibility
2. Discoverer 4 provides no GUI mechanism to export a workbook and does not include workbooks when exporting business areas
3. The only mechanism to export Discoverer workbooks using Administrator is to use the command line. However, there are severe restrictions on functionality. These are:
 - Only the owner of a workbook can export a workbook. Discoverer administrators do not have the power to export end user workbooks, therefore user accounts need to be temporarily granted administration privileges during the process
 - There is no mechanism to export “ALL” workbooks for a user account. They have to be named explicitly on the command line
 - Workbooks must be exported on a user by user basis because there is no mechanism to export workbooks for multiple users at the same time

4. The GUI can be used to import the data but once again there are restrictions
 - Workbooks are saved to the account of the user that is logged in, therefore the import can only be run when logged in as the owner
 - In order to log in on the target database the owner account needs to have Administration privileges
5. The majority of workbooks should be migrated once before a project goes live and only workbooks deemed worthy of transfer should be migrated
6. Sharing rights are maintained during a GUI import, but only if the Responsibilities have been previously set up

Section 4 – Administration Privileges

1. In order for a workbook owner to be able to migrate their workbooks they need to have the Privileges shown below:



Privileges | User/Role | Query Governor | Scheduled Workbooks

Show privileges for: User Responsibility [Discoverer UWA TSS Workbook W]

Privilege	Description
<input checked="" type="checkbox"/> Administration	
<input type="checkbox"/> Format Business Area	
<input checked="" type="checkbox"/> Create/Edit Business Area	
<input type="checkbox"/> Create Summaries	
<input type="checkbox"/> Set Privilege	
<input type="checkbox"/> Manage Scheduled Workbook	
<input checked="" type="checkbox"/> User Edition	
<input checked="" type="checkbox"/> Create/Edit Query	
<input checked="" type="checkbox"/> Collect Query Statistics	

Select a system profile: []

OK Cancel Apply Help

Note: The above Privileges need to be granted in both the source and target end user layers

2. The Privileges only need to be active during the migration. When the migration is complete uncheck the Administration Privilege

Section 5 – Sequence of events to migrate workbooks

1. Make sure that the Responsibilities exist in the source and target
2. Make sure that the workbook owner has the same Responsibilities in both the source and target
3. Make sure that the Responsibility has been granted access to the same business areas in both source and target
4. Log in as SYSADMIN (if operating in Apps mode), or as the EUL owner (if operating in non Apps mode), to the Administration edition of both Source and Target and grant the Administration Privilege to the Responsibility (Apps mode) or the role or user (non Apps mode) – see section 4 for the settings
5. The following SQL query can be used to obtain the names of the workbooks for a given user in Apps mode:

```
select
    docs.doc_name,
    docs.doc_eu_id,
    fnd.user_name
from
    eul4_us.eul4_documents docs,
    eul4_us.eul4_eul_users users,
    fnd_user fnd
where
    users.eu_id = docs.doc_eu_id
and concat('#',fnd.user_id) = users.eu_username
and fnd.user_name = 'DISCOUSER'
```

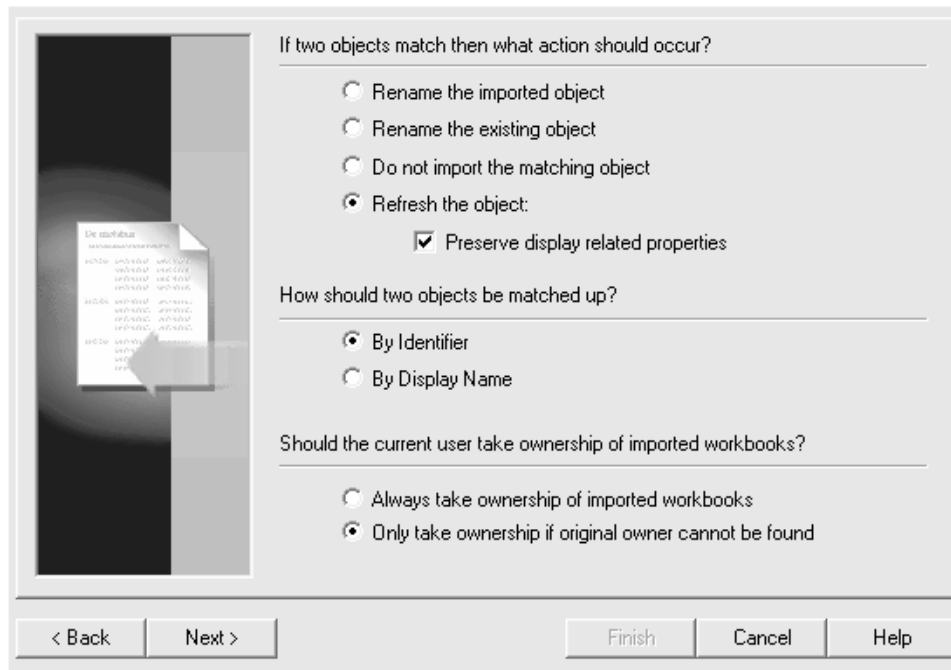
6. Having determined which workbooks are needed, edit the batch file called export.bat, to add the user's personal and workbook details

7. Here is an example command line:
 - `c:\orant\discvr4\dis4adm /connect "discouser:user responsibility"/password@database /eul EUL4_US /export c:\output\export_file.eex /workbook workbook1_name /workbook workbook2_name`

Note: You must separate the username from its Responsibility by a colon, and if the Responsibility name contains spaces both names must be enclosed by double quotes. Notice that multiple workbooks can be exported at the same time

8. If you want to export workbooks for more than one user at the same time, you must include a separate line within the batch file for each user, and you must export each user's data to a different eex file
9. Having edited and saved the export.bat, connect to DOS and execute the batch file
10. To import the data into the target end user layer, follow this workflow:
 - Launch the Discoverer Administrator edition
 - Connect as the workbook owner
 - From the menu bar select [File | Import](#)
 - Click [Add](#), and select the eex file
 - Click [Next](#)
 - Choose the options displayed in the illustration on the next page

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- Click [Next](#)
- Click [Start](#)
- When the workbooks have been imported, click [Finish](#)

Note: You should be able to re-export a workbook, however if this does not work you will have to delete the workbook from the target and restart the import

11. When the import has completed, don't forget to go back in as SYSADMIN and uncheck the Administrator Privilege
12. Inform the users that the workbooks have been migrated and ask them to test that they work
13. If any users had Shared their workbooks with other users they will need to re-enable this sharing inside Discoverer 4

Workbook Migration Guidelines



As far as is known this white paper is accurate and valid as of January 14, 2004

If you spot any errors or omissions please contact us at:

info@learndiscoverer.com

and we will be delighted to make that correction or improvement

Best wishes in advance

Michael Armstrong-Smith

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