Oracle® Communications MetaSolv Solution

Operational Reports

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Oracle Communications MetaSolv Solution Operational Reports, Release 6.3.1

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Contents

Preface

This guide contains the procedures and information you need to install and initially configure Oracle Communications MetaSolv Solution (MSS) Operational Reports using Oracle Business Intelligence Publisher (BI Publisher).

Audience

This guide is for individuals responsible for installing or maintaining MetaSolv Solution and ensuring the software is operating as required. This guide assumes the installer has an Oracle DBA and WebLogic administrator background.

- Programmers, program analysts, and system analysts who are familiar with SQL and gather requirements for reports.
- Database administrators and system analysts who design, build, and customize reports.
- Management or administrative personnel responsible for generating reports.

Related Documents

For more information, see the following documents in the MSS documentation set:

- *MSS Planning Guide:* Describes information you need to consider in planning your MSS environment prior to installation.
- *MSS Installation Guide:* Describes system requirements and installation procedures for installing MetaSolv Solution.
- *MSS System Administrator's Guide:* Describes postinstallation tasks and administrative tasks such as maintaining user security.
- *MSS Security Guide:* Provides guidelines and recommendations for setting up MSS in a secure configuration.
- *MSS Database Change Reference:* Provides information on the database changes in MSS releases.
- *MSS Network Grooming User's Guide:* Provides information about the MSS Network Grooming tool.
- *MSS Address Correction Utility User's Guide:* Provides information about the MSS Address Correction utility.
- *MSS Technology Module Guide:* Describes each of the MSS technology modules.
- *MSS Data Selection Tool How-to Guide:* Provides an overview of the Data Selection Tool, and procedures on how it used to migrate the product catalog, equipment specifications, and provisioning plans from one release of your environment to another.

- *MSS CORBA API Developer's Reference:* Describes how MSS APIs work, high-level information about each API, and instructions for using the APIs to perform specific tasks.
- *MSS Custom Extensions Developer's Reference:* Describes how to extend the MSS business logic with custom business logic through the use of custom extensions.
- *MSS Web Services Developer's Guide:* Describes the MSS Web Services and provides information about the MSS Web Service framework that supports web services, the various web services that are available, and how to migrate existing XML API interfaces to web service operations.
- *MSS EJB API Developer's Reference:* Provides an overview of the MetaSolv Solution EJB APIs and instructions for using the APIs to perform tasks.

For step-by-step instructions for tasks you perform in MSS, log in to the application to see the online Help.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

1 About MSS Operational Reports

Oracle Communications MetaSolv Solution (MSS) Operational Reports provides the vital business intelligence you need by giving you immediate access to critical information maintained within MetaSolv Solution through reports.

Each kit contains a set of reports for a specific area within the application.

MSS Operational Reports gives you the ability to customize data models and the reports. You can add new reports quickly using the supplied objects and filters, and a simple drag-and-drop interface makes it easy to create, modify, and filter reports. In addition, you can add calculations and queries to customize the data.

Oracle Communications Metasolv Solution (MSS) supports Oracle Business Intelligence Publisher (BI Publisher), which is the reporting standard for MSS. Through a separate, downloadable patch, MSS provides sample reports that you can run and customize within BI Publisher.

Support and Maintenance

MSS Operational Reports may be enhanced when new versions of the MetaSolv Solution data model are released. These enhancements are available to MetaSolv Solution users who have signed maintenance agreements. The enhancements may include any additional objects, filters, and reports for new data structures and new requirements.

Your MSS maintenance contract covers support for MSS Operational Reports, but you are required to license Business Intelligence Publisher (BI Publisher) separately.

Installing and Configuring BI Publisher

The following sections provide information on installing and configuring BI Publisher.

This document assumes you are familiar with BI Publisher and its documentation, which is available on the Oracle documentation website:

`https://docs.oracle.com/middleware/bi12214/bip/index.html`

Installing BI Publisher

BI Publisher is not part of MSS Installer. To use BI Publisher for MSS reporting, you must install it manually.

BI Publisher is installed as part of Oracle Business Intelligence. So, to install BI Publisher, install Business Intelligence by following the instructions in *Installing and Configuring Oracle Business Intelligence*, located here:

`https://docs.oracle.com/middleware/bi12214/lcm/BIEIG/toc.htm`

Configuring BI Publisher

After you have successfully installed BI Publisher, you need to configure it by performing the tasks described in this section.

Getting Started

To get started with configuring BI Publisher, do the following:

1. Start the BI Publisher WebLogic server by following the instructions in *Fusion Middleware User's Guide for Oracle Business Intelligence Publisher*, located here:

   `https://docs.oracle.com/middleware/bi12214/bip/BIPUG/toc.htm`

2. Ensure you have privileges to log in to BI Publisher as an administrator.

Adding a Data Source and Establishing a Database Connection

To run reports against MSS data using BI Publisher, you must add MSS as a data source to BI Publisher and establish a database connection to MSS.

To add a data source and establish a database connection:

1. Log in to BI Publisher as an Administrator.
2. Follow the instructions for creating data sources in chapter Setting Up Data Sources of the *Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*, located here:

   `https://docs.oracle.com/middleware/bi12214/bip/BIPAD/toc.htm`

Adding Users

To provide users with view access, BI Publisher offers several security options to provide access.

To add a user and a role, and assign the role to the user:

1. Log into BI Publisher as Administrator.
2. Determine the security model option to use from the administrator's overview. Follow the instructions for granting permissions in the *Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*, located here:

   `https://docs.oracle.com/middleware/bi12214/bip/BIPAD/toc.htm`

Downloading and Installing the Sample Reports

This section provides information on downloading and installing the MSS sample reports, which are described later in this document.

Downloading the Sample Reports

The MSS sample reports are delivered in a separate ZIP file (**MSSBIPubReports.zip**), which you can download from My Oracle Support at:

`https://support.oracle.com/portal/`

Installing the Sample Reports

You can install the sample reports by using one of the following methods:

- Copying the ZIP file to the BI Publisher Repository
- Uploading the Sample Reports from within BI Publisher

Copying the ZIP file to the BI Publisher Repository

To install the sample reports by copying the ZIP file to the BI Publisher Repository:

1. If you have not already done so, download the sample reports.

   See "Downloading the Sample Reports" for more information.

2. Open the *tempDir*/**MSSBIPubReports.zip** file.

   There are two kits:

   - Service_RequestKit.zip
   - Work_ManagementKit.zip

3. Extract the **BIPubReports** folder to the *BIPublisher_HOME*/**repository**/**Reports** directory.
4. Log in to BI Publisher.
5. In the upper right corner of the Home page, click the **Catalog** link.

   The Catalog appears.

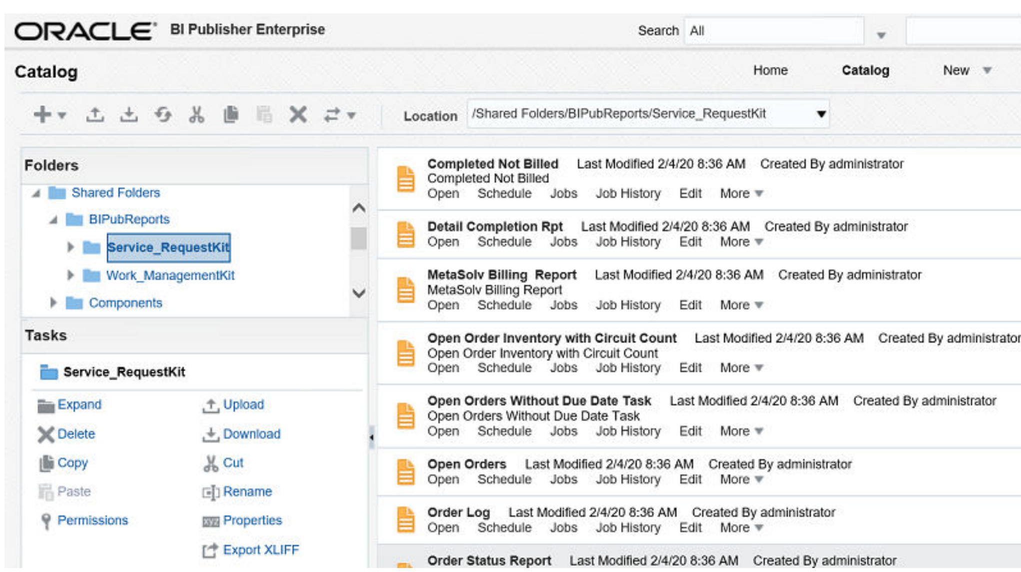
6. Expand **Shared Folders**, and select the **BIPubReports** folder.

   The sample reports are located in the **BIPubReports/Service_RequestKit** and **BIPubReports/Work_ManagementKit** folder, as shown in Figure 1-1.

7. Change the data model file to point it to the data source you created earlier.

   See "Changing the Data Model Source" for instructions.

Figure 1-1 Sample Reports in the BI Publisher Catalog



> **Note:**
>
> Regarding the BI Publisher Catalog, files in **Shared Folders** are accessible to other users, while files in **My Folder** are user-specific and are not accessible to other users.

Uploading the Sample Reports from within BI Publisher

To install the sample reports by uploading them from within BI Publisher:

1. Log in to BI Publisher.
2. In the upper right corner of the Home page, click the **Catalog** link.

   The Catalog appears.
3. Select **Shared Folder**.
4. Create a new folder named **BIPubReports/Service_RequestKit** under **Shared Folder**.
5. Select the **BIPubReports/Service_RequestKit** folder.
6. Create a new folder named **Data Models** under **BIPubReports/ Service_RequestKit**.
7. Select the **BIPubReports/Service_RequestKit** folder.
8. Click the **Upload Resource** icon.

   The Upload dialog box appears.
9. Click **Browse**.

   The Choose File to Upload window appears.
10. Navigate to *tempDir***/BIPubReports/Service_RequestKit**.
11. Select an XDOZ file and click **Open**. (These are the report files.)

    The Upload dialog box appears.
12. Click **Upload**.
13. Repeat steps 7 through 12 to upload each XDOZ file.
14. Select the **Data Models** folder.
15. Click the **Upload Resource** icon.

    The Upload dialog box appears.
16. Click **Browse**.

    The Choose File to Upload window appears.
17. Navigate to *tempDir***/BIPubReports/Service_RequestKit/Data Models**.
18. Select an XDMZ file and click **Open**. (These are the data model files.)

    The Upload dialog box appears.
19. Click **Upload**.
20. Repeat steps 14 through 19 to upload each XDMZ file.

21. The sample reports are located in the **BIPubReports/Service_RequestKit** folder, as shown in Figure 1-1.
22. Change the data model file to point it to the data source you created earlier.

    See Changing the Data Model Source for instructions.
23. Repeat the same steps for **Work_ManagementKit**.

Understanding the Sample Reports

This section describes the following sample reports:

- Service Request Reporting Kit
- Work Management Reporting Kit

Service Request Reporting Kit

This kit contains reports that are specific to service requests. The report is generated at the order level, and not at the detail level.

Table 1-1 lists the reports contained within this kit.

Table 1-1 Service Request Reporting Kit: Report Definitions and Potential Uses

Report Name	Description	Potential Uses
Completed Orders Not Billed	Lists all the service requests that are complete but have not been sent to the billing system.	Prevent revenue leakage by identifying unbilled service requests.
Detail Circuit Completion	Provides a summary of statistics, dates, and other details about service requests for a particular organization. This report includes all service request types.	Track service requests by circuit IDs.
MetaSolv Solution Billing Report	Lists the service requests that have been modified.	Identify items that may require a change in billing. This report is efficiently utilized in the batch mode by querying for service requests that have changed in the last 24 hours. However, you can run this report in the on-line mode.
Open Order Inventory with Circuit Count	Lists all the open service requests that are not due date complete. This report is grouped by receipt date and sectioned by month. A list of open service requests is displayed with all other open service requests received in the same month. The number of circuits on the service request is also included in this report.	Track order inventory. Use this report as a starting point for tracking potential customer relations problems.

Table 1-1 (Cont.) Service Request Reporting Kit: Report Definitions and Potential Uses

Report Name	Description	Potential Uses
Open Orders By Date	Lists the open service requests for a given date range. This report is first sorted by work group, and then by task scheduled completion date. The report also generates counts for total service requests, service requests in a work group, and service requests in a work queue.	Generate a work log or view past due or upcoming service requests.
Open Orders without a Due Date Task	Lists all the incomplete service requests that do not have a due date task. This report includes information about the service request and its associated tasks.	Audit service requests that do not contain due date tasks.
Order Log	Provides a summary list of service requests, including ISR, LSR, and PSR data, and columns for organization, service type group, order number, and type of service request. The report also gives service request date information, including the received date, the due date, and the completion date. There is also a column that indicates if the due date was met.	Based on user criteria/ selection of Service Request Type, Circuit Status, and Task Actual Completion Date Range, view a summary of service requests and identify potential problem areas.
Order Status	Lists all the service requests that have a late DLRD or RID task. This report includes high-level order information and a list of circuits accompanying the service requests.	Resolve potential customer complaints due to delays in circuit design.
PON & RPON Mismatch	Compares the purchase order number (PON) and the related purchase order number (RPON) and reports any differences found between the two values.	Identify service requests that have differences between the PON and the RPON.
Service Order Tracking	Provides a tool for tracking the progress of service requests. This report includes information about ISR, LSR, and PSR. It includes columns for organization, service type group, order number, and the type of service request.	Based on user criteria/ selection of Service Request Type, identify problem areas with service requests.

Table 1-1 (Cont.) Service Request Reporting Kit: Report Definitions and Potential Uses

Report Name	Description	Potential Uses
Service Request Tracking Summary Report	Calculates the completion time for a service request that has been due date completed.	Calculates the average process time for a service request.

Work Management Reporting Kit

This kit contains reports that concentrate on the Work Management module in MetaSolv Solution.

Table 1-2 lists the reports contained within this kit.

Table 1-2 Work Management Reporting Kit: Report Definitions and Potential Uses

Report Name	Description	Potential Uses
Closed Jeopardy Report	Lists all the jeopardy items closed within a specified date range.	Analyze the use of jeopardy. It allows you to determine if the codes are being used accurately by identifying the jeopardy code as it relates to late and potentially late service requests.
Jeopardy Report By Code and Task	Lists all service requests based on solicited task information. You can specify the task type, task status, and jeopardy code type. Based on the information you specify, this report returns a list of service requests and any associated child service requests.	Determines how jeopardy and why missed codes are used across different task types.
Non-Work Day List	Generates a list of non-work days for a specific organization or group of organizations. Non-work days include both weekends and holidays.	Review your work calendar and view the days that are not available for task scheduling.
On Time Task Analysis by Work Group	Calculates the number of tasks completed on time by considering the task actual completion date. This report also displays an on-time percentage of tasks completed by work group, provides a graphical view, and drill-down capabilities.	Evaluate the efficiency of each work group in an organization.

Table 1-2 (Cont.) Work Management Reporting Kit: Report Definitions and Potential Uses

Report Name	Description	Potential Uses
Open Jeopardy With Escalation Information	Lists all the open service requests with a jeopardy code.	Identify open late tasks. This report enables you to view late tasks and the associated escalation information.
Provisioning Plan Assignment List	Lists provisioning plans, the tasks associated with the provisioning plans, and the default work queue for each task.	Evaluate your provisioning plans and the tasks associated with those plans. It may be useful when associating new products with provisioning plans.
Work Queue Assignment	Lists task assignments for a selected work queue.	Identify the workload for each work queue.
Work Queue Interval	Analyzes task completion using interval days. Expected intervals are compared against actual completion intervals and an average interval in days is calculated.	Determines if the expected completion intervals on provisioning plans need to be adjusted to meet actual results.
Work Queue Ownership	Provides details on which employees own each work queue.	Level resources.
Work Queue Unavailability	Indicates the period of time during which an employee is unavailable.	Schedule or identify production downtime by analyzing the time period when employees are out of the office.

Running the Sample Reports

To run the sample reports:

1. Log into BI Publisher.
2. In the upper right corner of the Home page, click the **Catalog** link.

   The Catalog appears.
3. If this is the first time you are running the sample reports, edit the data model to point to a data source. For instructions on how to do this, see "Changing the Data Model Source".
4. Expand **Shared Folders**, and select the **BIPubReports** folder.
5. Click the **Open** link for the report you want to run.

   Depending on the report you opened, a list or lists from which to select data appears.
6. Select data from the list or lists that are present for the report you are running.
7. Click **Apply** to apply your data selections and run the report.

   The report appears.

Modifying Existing Sample Reports

You can modify the existing sample reports by:

- "Editing Existing Sample Reports" to alter the report format
- "Changing the Data Model Source" to alter the data that appears in existing sample reports
- "Setting Default Parameter Values" to alter the data that appears in the report

Any reports you create by modifying the existing sample reports can be run in the same manner as the sample reports. See "Running the Sample Reports" for more information.

Editing Existing Sample Reports

To edit an existing sample report:

1. Log into BI Publisher.
2. In the upper right corner of the Home page, click the **Catalog** link.

   The Catalog appears.
3. Expand **Shared Folders**, and select the **BIPubReports** folder.
4. Click the **Edit** link for the report you want to edit.
5. Edit the report format.

   For detailed information on editing the report format, click the Help icon on this page.
6. Click the **Save** icon.

Changing the Data Model Source

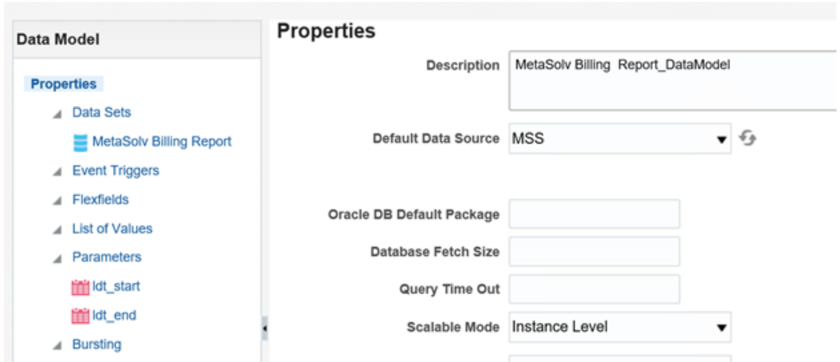
To change the Data Model Source:

1. Log into BI Publisher.
2. In the upper right corner of the Home page, click the **Catalog** link.

   The Catalog appears.
3. Expand **Shared Folders**.
4. Expand **BIPubReports**, and select the **Data Models** folder.
5. Click the **Edit** link for the data model you want to edit.
6. Click **Data Model**.

   The Properties page for the selected data model appears.
7. From the **Default Data Source** list, select a different data source, as shown in Figure 1-2.

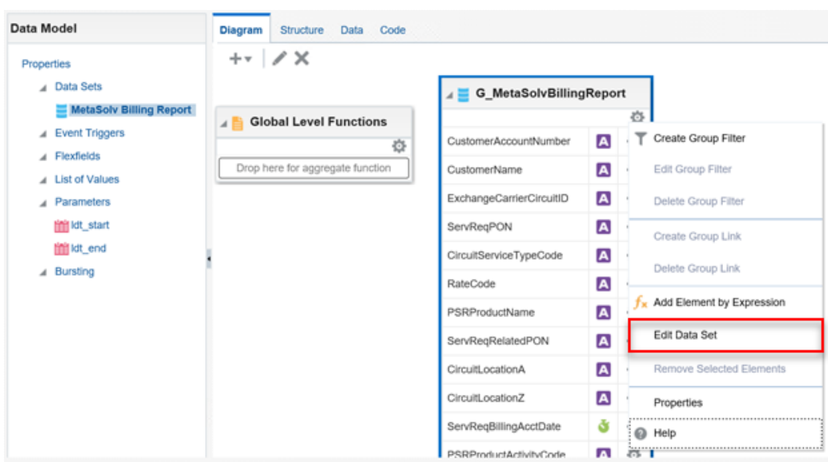
Figure 1-2 Data Model Properties Page



8. Expand **Data Model**, and select **Data Sets**.
9. Select a data set.

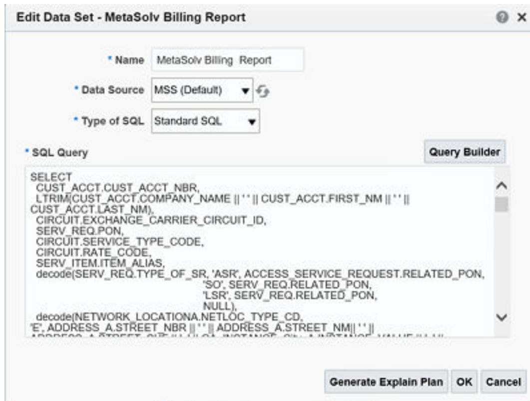
   The **Diagram** tab for the selected data set appears.
10. Click the **View Actions** list menu located in right corner of the data set.
11. From the View Actions menu, select **Edit Data Set**, as shown in Figure 1-3.

Figure 1-3 View Actions Menu



The Edit Data Set dialog box appears, as shown in Figure 1-4.

Figure 1-4   Edit Data Set Dialog Box



12. Change **Data Source**.
13. Close the Edit Data Set dialog box.
14. Click the **Save** icon.

Setting Default Parameter Values

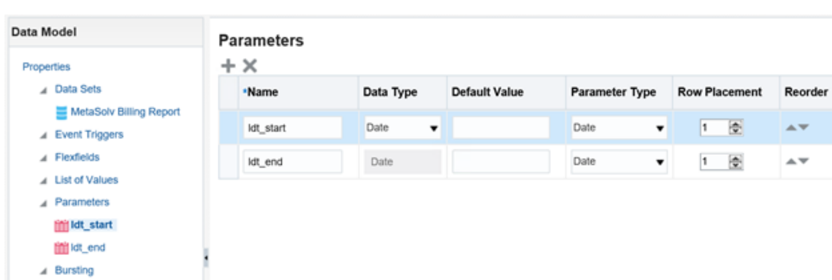
To set default parameter values:

1. Log into BI Publisher.
2. In the upper right corner of the Home page, click the **Catalog** link.

   The Catalog appears.
3. Expand **Shared Folders**.
4. Expand **BIPubReports**, and select the **Data Models** folder.
5. Click the **Edit** link for the data model you want to edit.
6. Expand **Data Model**, and select **Parameters**.
7. Select a parameter.

   The Parameters page for the selected parameter appears, as shown in Figure 1-5.

Figure 1-5   Data Model Parameters Page



8. Set or change the value in the **Default Value** field.
9. Click the **Save** icon.

Creating New Reports

You can create a new data model to create a new report. To view example queries when creating new reports, see "Viewing Example Queries".

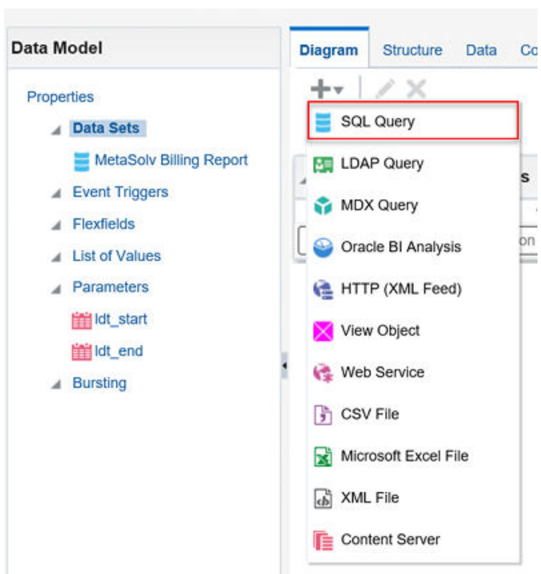
To create a new report:

1. Understand the data model entities you intend to use in your custom report.
2. In the upper right corner of the Home page, click the **New** icon, and select **Data Model**.

   The Properties page for the new data model appears.
3. From the **Default Data Source** list, select a data source.
4. Expand **Data Model** and select **Data Sets**.

   The **Diagram** tab for the selected data set appears.
5. Click the **New Data Set** list menu and select **SQL Query**, as shown in Figure 1-6.

   Figure 1-6 Data Model

   The Create Data Set - SQL dialog box opens.
6. Do one of the following:
   - Click **Query Builder**, select the appropriate tables, and build the query to populate the **SQL Query** field.
   - Copy and paste a pre-written query directly into the **SQL Query** field.
7. Click **OK** to close the Create Data Set - SQL dialog box.
8. Click the **Save** icon to save the data set.
9. Click the **Get XML Output** icon located next to the **Save** icon.

10. From the **Number of rows to return** list, select the number of rows to return.
11. Click **Run**.
12. Open the list menu located in the upper right corner of the page, and select **Save as Sample Data** to save the data.

    The **Diagram** tab for the new data set appears.
13. In the upper right corner of the page, click the **New** icon, then select **Report**, then select the **Using Existing Data Model** link.

    The Create Report window appears.
14. Select the data model and click **Next**.
15. Choose **Guide Me** and click **Next**.
16. From the Available Columns on the left side, select the columns that you want to appear in your report.
17. Click **Finish**.
18. On the **Insert** tab, use the listed Components to create data tables, bar charts, and so forth.
19. On the **Page Layout** tab, format your report by specifying portrait/landscape, headers/footers, and so forth.
20. Click the **Save** icon.

Any custom reports you create can be run in the same manner as the sample reports. See "Running the Sample Reports" for more information.

Viewing Example Queries

You can view the queries from any of the sample reports to use an example to follow when creating custom reports.

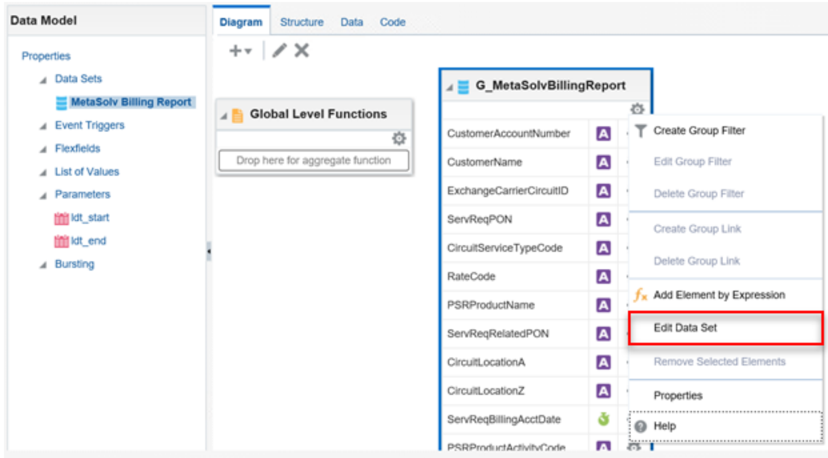
To view example queries:

1. Log into BI Publisher.
2. In the upper right corner of the Home page, click the **Catalog** link.

   The Catalog appears.
3. Expand **Shared Folders**.
4. Expand **BIPubReports**, and select the **Data Models** folder.
5. Click the **Edit** link for the applicable data model.
6. Expand **Data Model**, and select **Data Sets**.
7. Select a data set.

   The **Diagram** tab for the selected data set appears.
8. Click the **View Actions** list menu located in right corner of the data set.
9. From the View Actions menu, select **Edit Data Set**, as shown in Figure 1-7.

Figure 1-7 View Actions Menu



The Edit Data Set dialog box appears, as shown in Figure 1-8.

Figure 1-8 Edit Data Set Dialog Box

Here, you can view the query.

Troubleshooting BI Publisher

Refer to BI Publisher forum for troubleshooting information.

https://docs.oracle.com/middleware/bi12214/lcm/BIEIG/GUID-E6545BC6-D0BF-4521-B3E7-160ABBBB6CD3.htm#BIEIG-GUID-E6545BC6-D0BF-4521-B3E7-160ABBBB6CD3

Frequently Asked Questions

This section provides answers to frequently asked questions regarding the use and functionality of Oracle Communications MetaSolv Solution (MSS) Operational Reports.

Does Oracle support running MSS Operational Reports against the production database?

Oracle recommends that you not run reports on the production database, because this may cause network problems and performance issues.