

Deliver Oracle BI Publisher documents to Microsoft Office SharePoint Server 2007

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OVERVIEW

Oracle BI Publisher supports delivery of reports to multiple destinations – e-Mail, Printers, Fax, Servers using the standard protocols – SMTP, IPP, IFP, FTP, FTPS, webDAV etc. There has been a growing demand for all enterprise reporting solutions to deliver documents to a content management server where they can provide enterprise level capabilities to meet business-critical needs like managing content and business processes. Microsoft Office SharePoint Server 2007 is one such server program that facilitates collaboration, content management, and supports business processes. This whitepaper explains the steps to integrate Oracle BI Publisher with Microsoft Office SharePoint Server 2007 to deliver documents using webDAV protocol.

INTRODUCTION

Oracle BI Publisher supports webDAV (Web-based Distributed Authoring and versioning) which is an industry standard protocol to transfer files. WebDAV protocol is a set of extensions to HTTP protocol which allows user to collaboratively edit and manage files on remote web servers. It provides locking feature to prevent overwrite in a collaborative environment and is more efficient than FTP; one can pipeline multiple transfers through a single TCP connection, whereas FTP requires a new connection for each file transfer.

Microsoft Office SharePoint Server 2007 supports webDAV protocol and we can use the Microsoft Windows SharePoint Service 3.0 to connect to the server. Microsoft Office SharePoint Server 2007 can be installed on Windows Server 2003, Windows XP Service Pack2, or Windows Vista.

Following are the steps to connect to SharePoint server from BI Publisher.

1. Create a site in Sharepoint

To create a site, say RSSFeed, you can follow the steps listed below

- Open the SharePoint site that you would like to create a new child site within, for example, <http://servername>. If prompted enter the username and the password. On the top link bar, click Site Settings.
- In the Administration section, click Manage sites and workspaces.

- Click Create, to display the New SharePoint Site page.
- In the Title text box, type RSSFeed, to establish a display name for the new site.
- In the Description textbox, type a description, such as Site for general buyer collaboration, to help users understand the purpose for the new site.
- In the URL name textbox, type RSSFeed for the Web Site Address.
- Click the option button that defines the type of permissions you want to initially use on the site. For the Buyers site, use the default option Use same permissions as parent site.

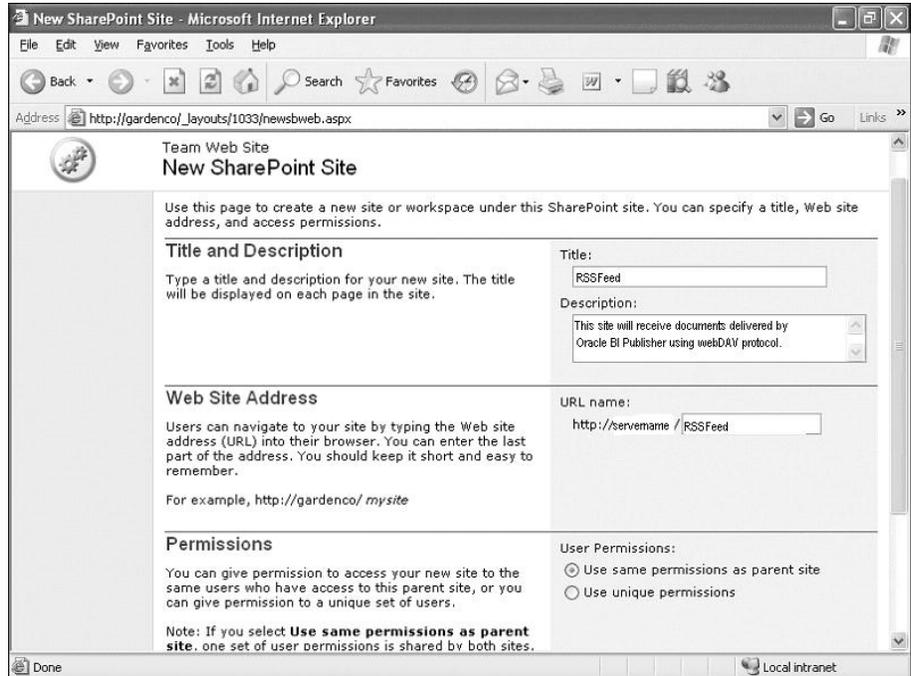


Figure1. New SharePoint Site page

- Click the Create button
- The Template Selection page appears.

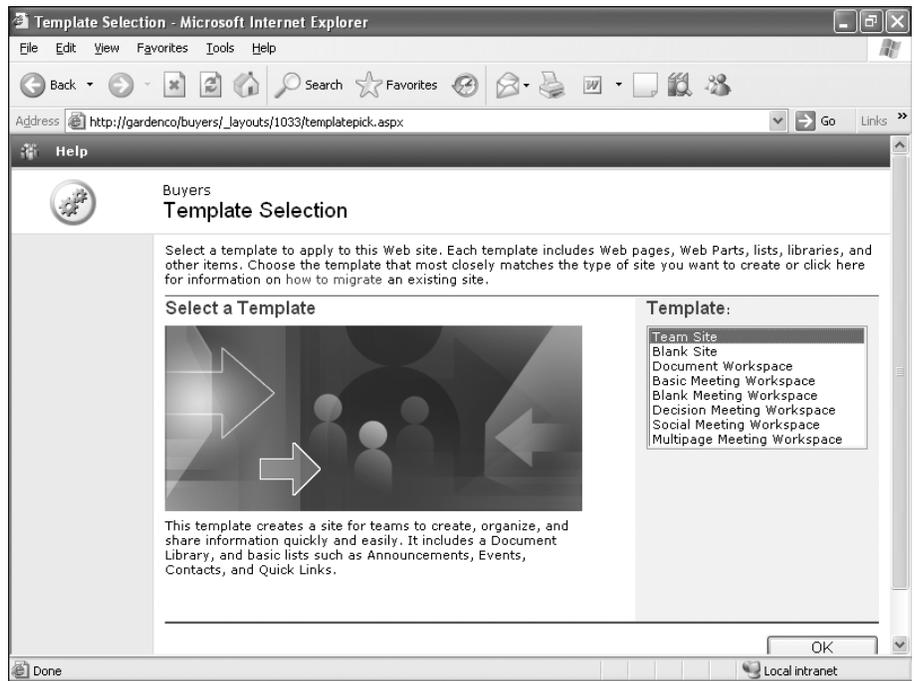


Figure2. Template Selection page

- In the Template list, click Team Site.
- Click OK to create the new site with a default set of Web Part Pages, Web Parts, lists, and document libraries for the buyers to use on the new site.
- The RSSFeed Home page appears.

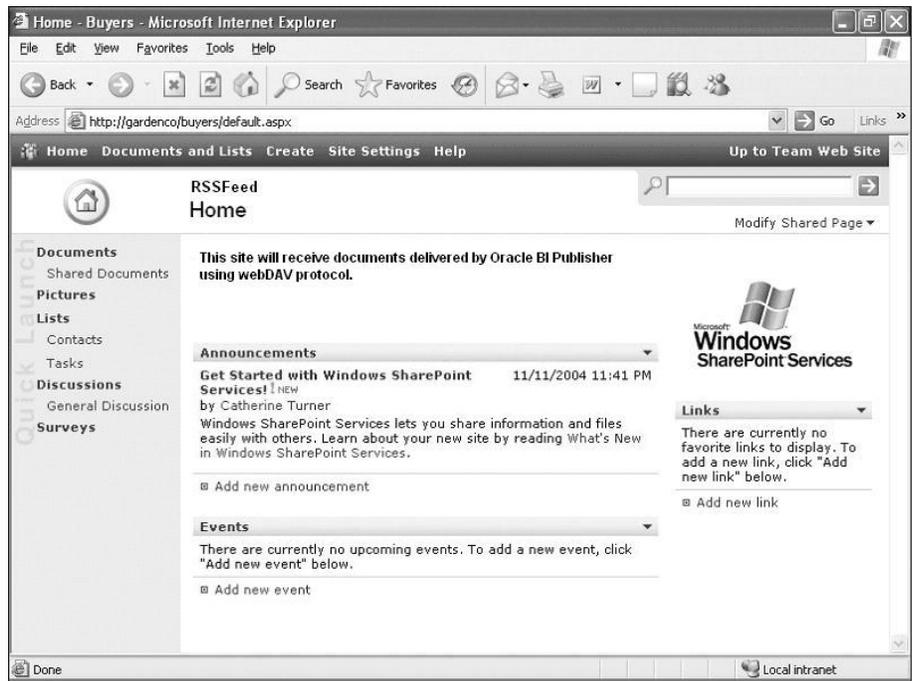


Figure3. New Site Home page

2. Create a WebDav connection to the SharePoint site

To create a WebDav connection to the SharePoint site, take the following steps:

- Open Windows Explorer. Double click "My Network Places"
- Double click "Add Network Place"
- Click "Next"
- Choose "Choose another network location" option and click "Next"
- Enter your domain name or IP address of your web server (For e.g.: <http://servername/RSSFeed>)
- Then click "Next"
- You will be prompted for username and password, please use your SharePoint login credentials
- Give a name for the connection and click "Next"
- Click "Finish"

It looks like this after the WebDAV connection is created:

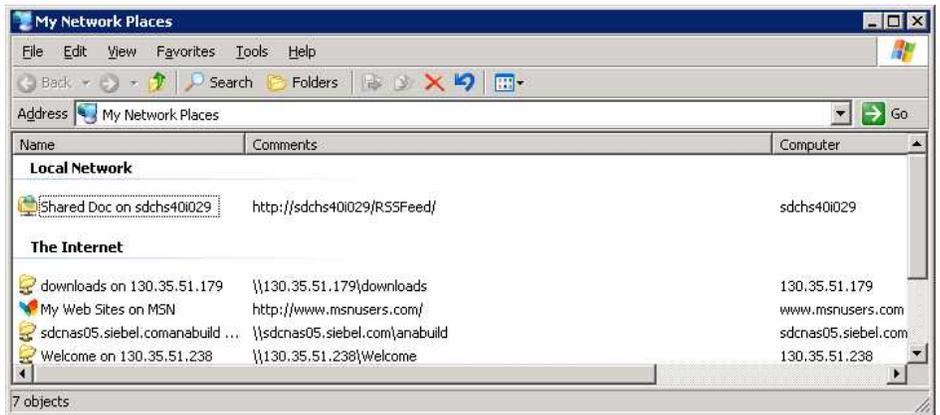


Figure4. My Network Places

3. Enable WebDAV under Web Service Extensions

Open IIS Manager and change WebDAV status from Prohibited to Allowed.

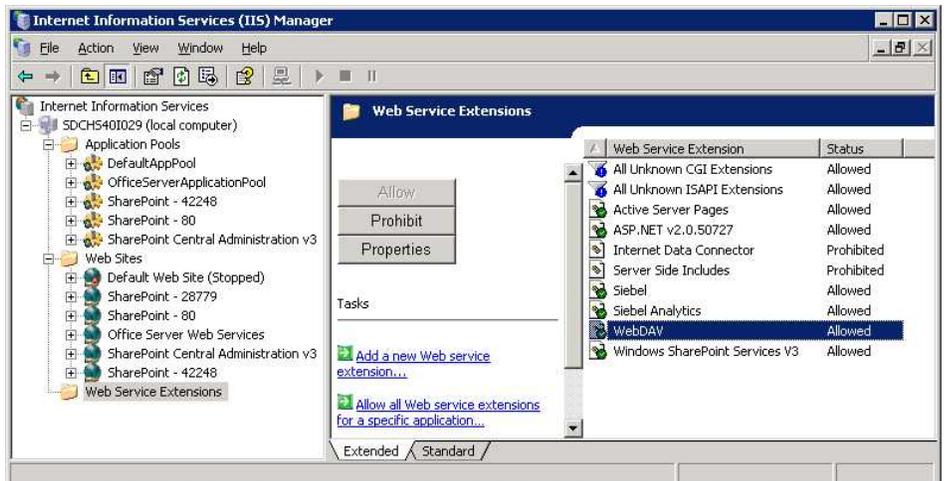


Figure5. Changing the status for WebDAV from prohibited to Allowed

4. Configure IIS Authentication Methods

In the IIS Manager, select "SharePoint - 80" under Web Sites.

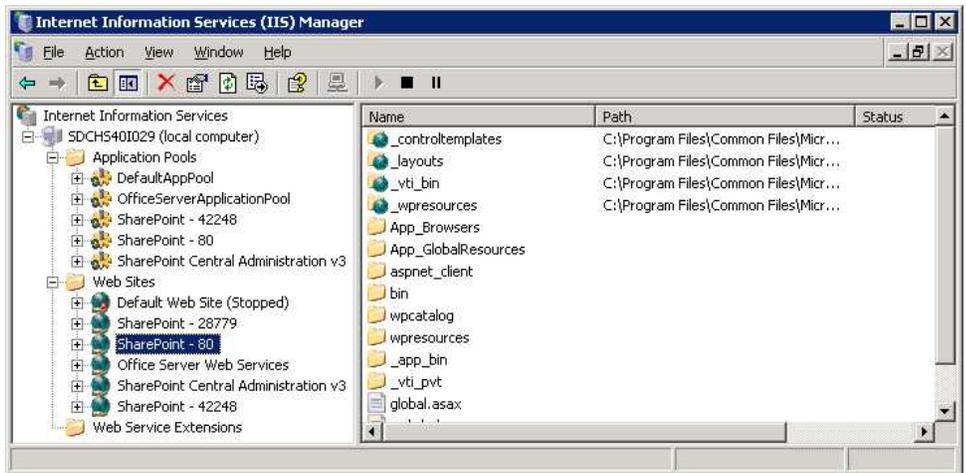


Figure6. Select SharePoint – 80 in IIS Manager

Right click on "SharePoint - 80" and click on properties, it will bring up the properties dialog as shown below:

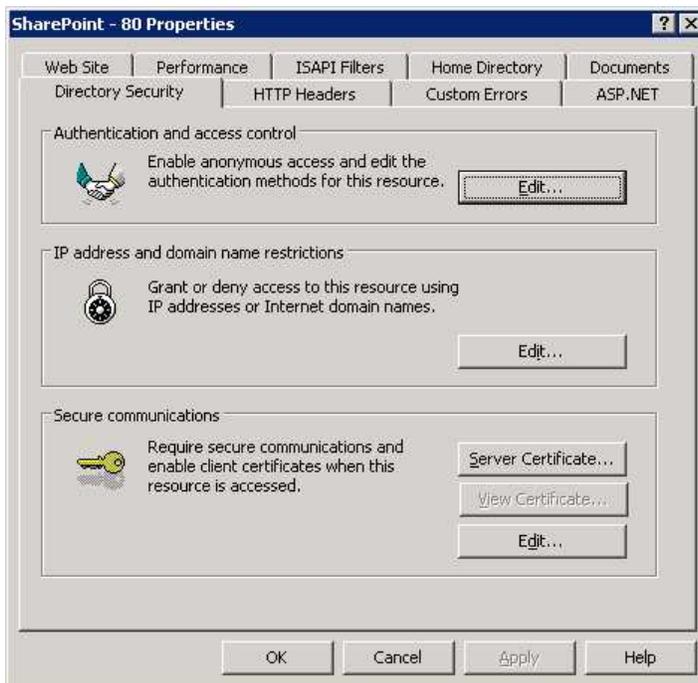


Figure7. SharePoint – 80 Properties

Select Directory Security, in Authentication and access control, click on Edit button.

The default setting for Authenticated access is Integrated Windows authentication. It's very import to select Basic authentication instead because BI Publisher supports only Basic authentication and Digest authentication for Windows domain servers. You must match the Auth type with BI Publisher.



Figure8. Select Basic Authentication

5. Change Permission settings in IIS

First you need to add the SharePoint user name which has administrator privilege in the group. Then make sure this user has right permissions.

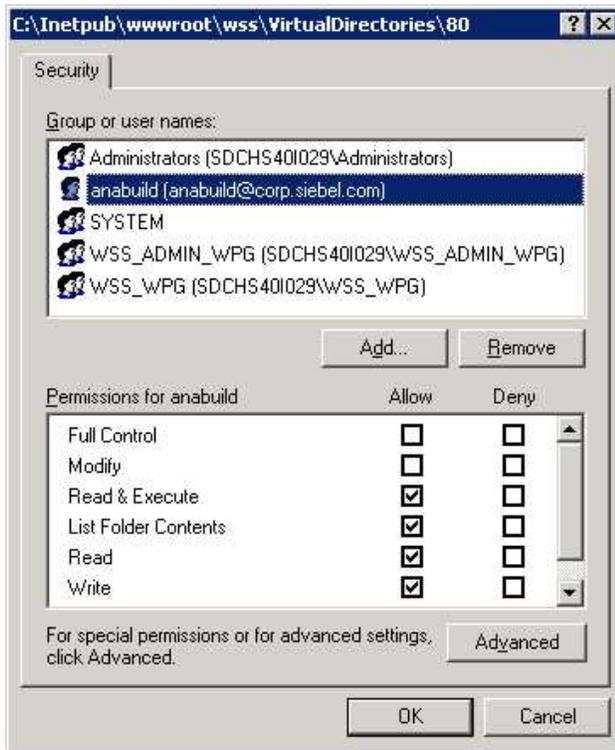


Figure9. Checking user permissions

6. In BI Publisher set up Web Folders as Destination.

Make sure the Authentication type matches what's set in IIS which is Basic.

As shown in the following, use full user name, for example, anabuild@corp.siebel.com instead of anabuild.

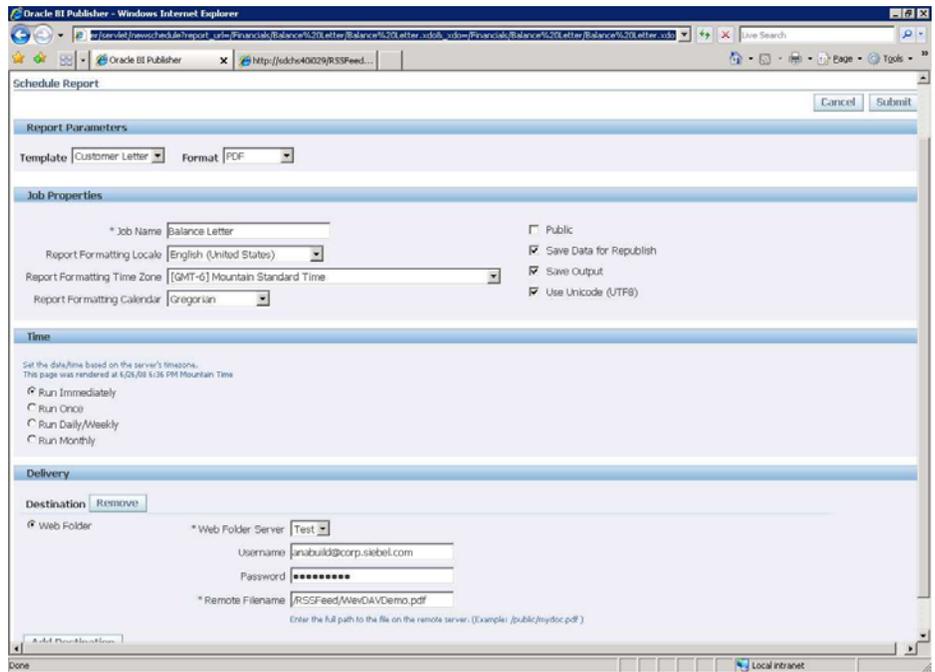


Figure10. Setting Delivery Destination as Web Folder

7. After BI Publishes delivered successfully, go to IE. File->Open. A dialog pops up like shown below:



Figure11. Navigate to the SharePoint Site

Make sure you give the correct WebDAV connection to your SharePoint site. Make sure you check Open as Web Folder. Then click OK.

Now you can see 2 files delivered by BI Publisher are shown in the list, WevDAVDemo.pdf and WevDAVDemo.html.

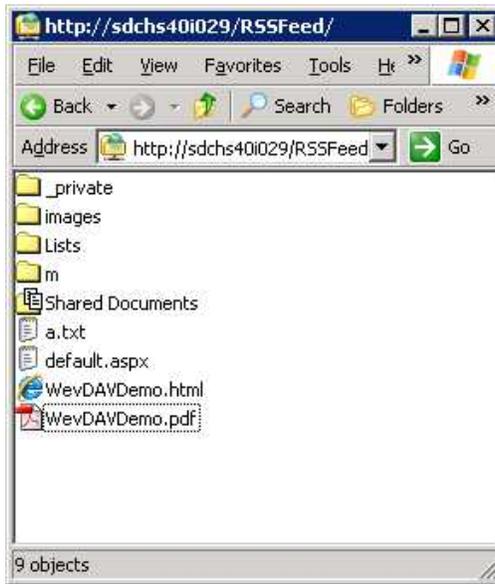


Figure12. Files Delivered to SharePoint

CONCLUSION

With few simple steps we were able to create a site on SharePoint Server, connect to the site using WebDAV and then we could successfully deliver a report from BI Publisher. On one hand we benefit from the WebDAV advantages of managing these delivered files as a local file, unlike FTP where you edit a local copy and then upload the file to the server., and on the other hand, we take advantage of the SharePoint Server abilities where one can quickly create SharePoint sites that support specific content publishing, content management, records management, or business intelligence needs.



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