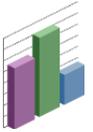This guide explains how to manage Oracle BI Presentation Catalogs. It describes Catalog Manager and some of the tasks that you can perform with Catalog Manager to manage catalogs.

For more detailed information about these and other tasks, see the Oracle BI EE documentation on Oracle Technology Network.

Understanding Catalog Manager

Catalog Manager is a tool that lets you perform online and offline management of Oracle BI Presentation Catalogs. You use Catalog Manager to:

- Manage folders, shortcuts, and objects, such as analyses, filters, prompts, and dashboards.
  For example, you can rename and delete objects, and you can move and copy objects within and between catalogs.

- View and edit catalog objects in Extensible Markup Language (XML).

- Preview objects, such as analyses and prompts.

- Search for and replace catalog text.

- Search for catalog objects.

- Create analyses to display catalog data.

- Localize captions.

Starting Catalog Manager

From the Start menu on Windows, select **Oracle Business Intelligence**, and then select **Catalog Manager**.

Oracle Business Intelligence
- BI Administration Help File
- BI Administration
- Catalog Manager
- Deinstall

Opening an Oracle BI Presentation Catalog

1. From Catalog Manager's **File** menu, select **Open Catalog**.

2. Complete the necessary fields, as described in the following list:

   - **Type** — Select the mode (online or offline) in which to open the catalog.

   - **Path** — If you are opening the catalog in offline mode, then enter the path to the catalog folder on the local file system.

   - **URL** — If you are opening the catalog in online mode, then enter the URL to Oracle BI Presentation Services.

     Note: When specifying the URL for the catalog in online mode, ensure that you specify https rather than http, for increased security.

   - **User** — If you are opening the catalog in online mode, then enter the user name for the host URL (disabled in offline mode).

   - **Password** — If you are opening the catalog in online mode, then enter the password for the host URL (disabled in offline mode).

   - **Locale** — Select the locale to use for user interface elements in Catalog Manager and for objects in the catalog, when opening the catalog in online mode.

   - **Read-Only** — Select this field to open the catalog in read-only mode (disabled in offline mode).

3. Click **OK**.

Understanding the Catalog Manager Workspace

The Catalog Manager workspace enables you to view and work with catalog objects. It displays the following folders for an open catalog:

- The **shared folder** — Contains content that is shared among catalog users. This includes the preconfigured dashboards and analyses that are distributed with prebuilt applications, and other objects such as shared filters.

- The **system folder** — Contains administrative elements of Presentation Services. Some of these elements are distributed with the product, and others are configured by you as the administrator, such as privileges. Avoid modifying any files in this folder. Presentation Services uses these files internally.

- **The users folder** — Contains content that catalog users with the appropriate permissions have saved to their personal folders, such as individual analyses.

**Menu bar** — Provides access to the File, Edit, View, Tools, and Help menus.

Toolbar — Provides quick access to commonly used options, such as Cut, Copy, and Paste.
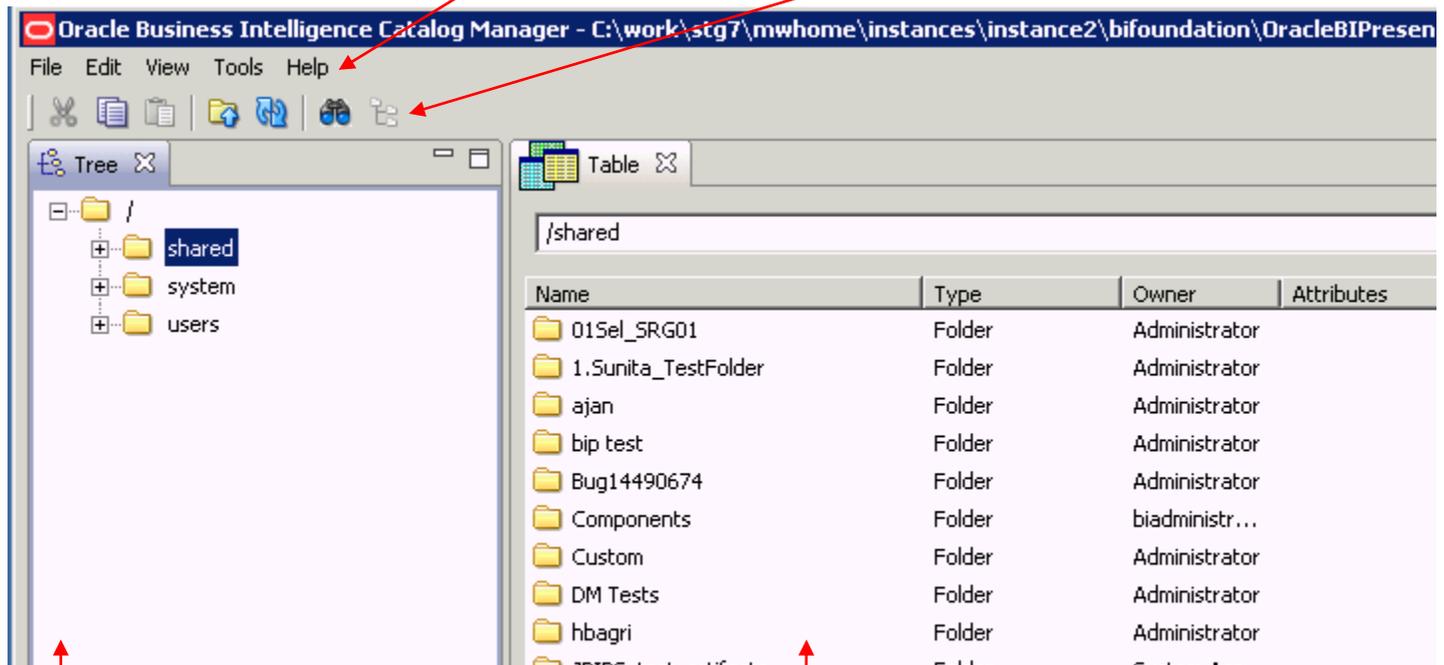
Tree pane — Displays catalog folders. This pane also displays objects, but only if the **Show Objects in Tree** option on the View menu is selected.

Table pane — Displays catalog folders and objects. Includes the navigation bar, where you can navigate to a catalog object by typing its path name.

Managing the View of the Catalog Manager Workspace
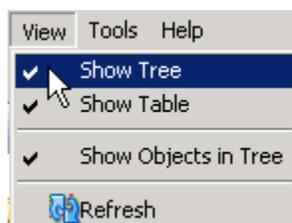
1. From Catalog Manager's View menu, select one of the following options:
   - **Show Tree** — Displays the Tree pane, if you had previously closed it.
   - **Show Table** — Displays the Table pane, if you had previously closed it.
   - **Show Job Status** — Displays the Background Job Status pane, where you can view the progress of processes that you have run, such as Search and Replace.
   - **Show Objects in Tree** — Displays the objects, such as analyses and filters, in addition to folders.
   - **Refresh** — Refreshes the objects that are displayed in the Tree and Table panes.

Searching for Catalog Objects

1. Open the catalog and navigate to the location in the tree where you want to begin the search.
2. Click **Search** on the toolbar.
3. In the Search for any or all criteria below field, enter the word or phrase to search for.
4. To make the search case-sensitive, select the **Case Sensitive** box.
5. To limit the search, click **Advanced Search**.
6. In the Advanced Search area, specify the constraints for the search. You can limit the search by:
   - **Name** — Limits the search to the names of objects.
   - **Description** — Limits the search to the Description property.
   - **Property values** — Limits the search to the values of properties.
   - **Owner** — Limits the search to the owners of objects.
   - **XML** — Limits the search to XML.
   - **Object type** — Searches for all types of objects or limits the search to a specific type of object that you specify (for example, analyses, filters, agents, dashboard prompts, dashboard pages).
   - **Date** — Limits the search to objects that were created on the dates that you specify or to objects that were last modified on the dates that you specify.
7. Click **Search**.

Tip: When you have finished searching, click **Explore the entire catalog tree** on the toolbar to return to the Tree and Table panes.

Copying and Pasting Objects Between Catalogs

Note: If the two catalogs have the same name, then you might want to rename one of the catalogs before opening it. This helps to distinguish between the two catalogs as you work. Both catalogs must be the same version 11.1.1. (or later).

1. Start two instances of Catalog Manager. Open the target catalog (the catalog to change) in one Catalog Manager instance. Open the source catalog (the one that contains the objects to copy) in the other Catalog Manager instance.
2. If necessary, reposition both instances of Catalog Manager on your screen so that you can display the title bars of both Catalog Manager instances.
3. In the Catalog Manager instance showing the source catalog, right-click the source object and select **Copy**.
4. In the Catalog Manager instance showing the target catalog, right-click at the point where you want to paste the source object and select **Paste**.

Renaming Catalog Objects

Without Reference Updates

This renames the object and preserves the references to the original name that other catalog objects might have.
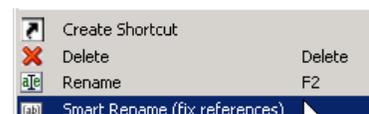
1. Open the catalog.
2. Navigate to the object to be renamed.
3. Right-click the object in the Name column and select **Rename**.
4. Type a new name for the object.
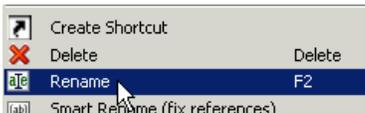
With Reference Updates

This renames the object and changes references that other objects might have to the new name (that is, original name references are not preserved).

1. Open the catalog in offline mode.
2. Navigate to the object to be renamed.
3. Right-click the object in the Name column and select **Smart Rename**.
4. Type a new name for the object.

Working with the Properties of Catalog Objects

1. Open the catalog.
2. Navigate to the object.
3. Right-click the object in the Name column and select **Properties**. The Properties dialog is displayed.
4. Perform the necessary tasks, such as changing the owner or the attributes of the object.

   Note: The **New** button is used to create a property. Use it only if instructed to do so by Oracle Support Services.
5. Click **OK**.
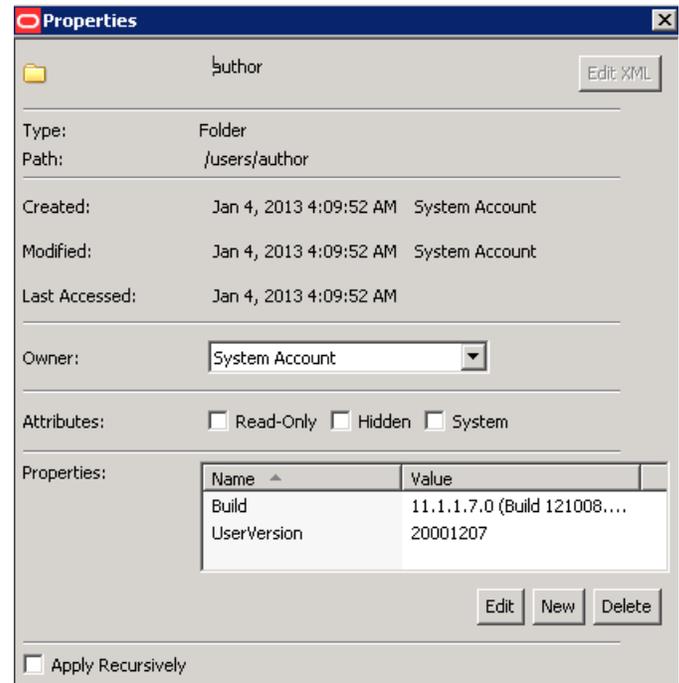
Creating Reports to Display Catalog Data
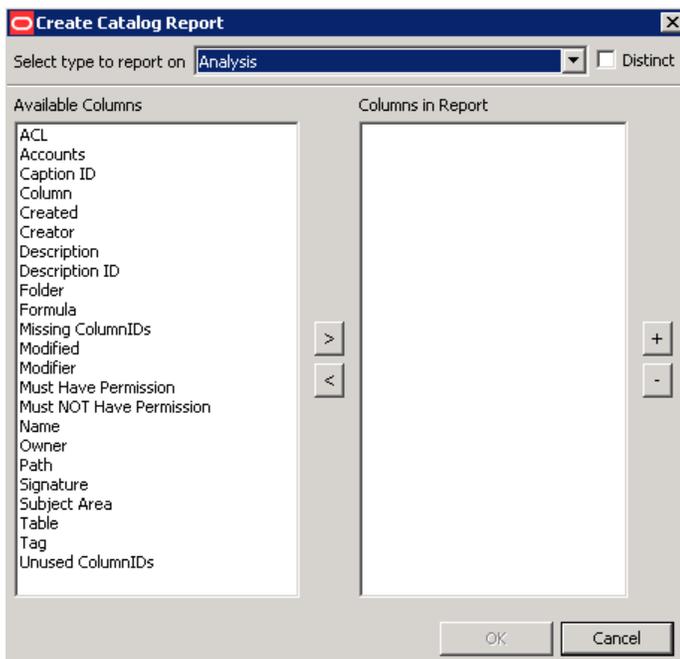
Note: You can either display the report on the screen or save it to a file. When you create a report, a blank or empty field is exported as a tab character. If you create a report with the default of a tab as the field separator, then two tab characters in the report file indicate a blank field.

1. Open the catalog. To create a report that shows the SQL statement that is sent to the Oracle BI Server for the object, open the catalog in online mode.
2. Select the top folder for the catalog.
3. From the Tools menu, select **Create Report**.
4. Select the catalog object type for which you want to create a report.
5. To eliminate any rows that are the same from the report, select the **Distinct** box.
6. Specify the columns to appear in the report in the Columns in Report list. Use the left and right-arrow buttons to move the columns between the Available Columns list and the Columns in Report list. Use the plus and minus buttons to set the order in which columns are displayed in the report.
7. Click **OK**.
8. Repeat Steps 4 through 7 until the report contains the appropriate columns.
9. To save the report to a file, in the **Save report to** field, specify the path name of the file. Click the **Browse** button to display the Save As dialog for selecting the path name (if the file does not exist, then it is created).
10. Select **Excel Format** to create a file with a .tab extension that can be imported into Microsoft Excel.
11. Click **OK**.