

Oracle® Balanced Scorecard

Install Guide

Release 12

Part No. B31192-01

October 2006

Oracle Balanced Scorecard Install Guide, Release 12

Part No. B31192-01

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- Did you understand the context of the procedures?
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- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
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Preface

Intended Audience

Welcome to Release 12 of the *Oracle Balanced Scorecard Install Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Computer desktop application usage and terminology

If you have never used Oracle Applications, we suggest you attend one or more of the Oracle Applications training classes available through Oracle University.

See Related Information Sources on page viii for more Oracle Applications product information.

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Structure

- 1 Introduction
- 2 Install Balanced Scorecard

Related Information Sources

This document is included on the Oracle Applications Document Library, which is supplied in the Release 12 DVD Pack. You can download soft-copy documentation as PDF files from the Oracle Technology Network at <http://otn.oracle.com/documentation>, or you can purchase hard-copy documentation from the Oracle Store at <http://oraclestore.oracle.com>. The Oracle E-Business Suite Documentation Library Release 12 contains the latest information, including any documents that have changed significantly between releases. If substantial changes to this book are necessary, a revised version will be made available on the online documentation CD on Oracle *MetaLink*.

If this guide refers you to other Oracle Applications documentation, use only the Release 12 versions of those guides.

For a full list of documentation resources for Oracle Applications Release 12, see Oracle Applications Documentation Resources, Release 12, Oracle *MetaLink* Document 394692.1.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF** - PDF documentation is available for download from the Oracle Technology Network at <http://otn.oracle.com/documentation>.
- **Online Help** - Online help patches (HTML) are available on Oracle *MetaLink*.

- **Oracle MetaLink Knowledge Browser** - The Oracle *MetaLink* Knowledge Browser lets you browse the knowledge base, from a single product page, to find all documents for that product area. Use the Knowledge Browser to search for release-specific information, such as FAQs, recent patches, alerts, white papers, troubleshooting tips, and other archived documents.
- **Oracle eBusiness Suite Electronic Technical Reference Manuals** - Each Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications and integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle *MetaLink*.

Related Guides

You should have the following related books on hand. Depending on the requirements of your particular installation, you may also need additional manuals or guides.

Oracle Applications Installation Guide: Using Rapid Install:

This book is intended for use by anyone who is responsible for installing or upgrading Oracle Applications. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle Applications Release 12, or as part of an upgrade from Release 11i to Release 12. The book also describes the steps needed to install the technology stack components only, for the special situations where this is applicable.

Oracle Applications Upgrade Guide: Release 11i to Release 12:

This guide provides information for DBAs and Applications Specialists who are responsible for upgrading a Release 11i Oracle Applications system (techstack and products) to Release 12. In addition to information about applying the upgrade driver, it outlines pre-upgrade steps and post-upgrade steps, and provides descriptions of product-specific functional changes and suggestions for verifying the upgrade and reducing downtime.

Oracle Applications Patching Procedures:

This guide describes how to patch the Oracle Applications file system and database using AutoPatch, and how to use other patching-related tools like AD Merge Patch, OAM Patch Wizard, and OAM Registered Flagged Files. Describes patch types and structure, and outlines some of the most commonly used patching procedures. Part of *Maintaining Oracle Applications*, a 3-book set that also includes Oracle Applications Maintenance Utilities and Oracle Applications Maintenance Procedures.

Oracle Applications Maintenance Utilities:

This guide describes how to run utilities, such as AD Administration and AD Controller, used to maintain the Oracle Applications file system and database. Outlines the actions performed by these utilities, such as monitoring parallel processes, generating Applications files, and maintaining Applications database entities. Part of

Maintaining Oracle Applications, a 3-book set that also includes Oracle Applications Patching Procedures and Oracle Applications Maintenance Procedures.

Oracle Applications Maintenance Procedures:

This guide describes how to use AD maintenance utilities to complete tasks such as compiling invalid objects, managing parallel processing jobs, and maintaining snapshot information. Part of Maintaining Oracle Applications, a 3-book set that also includes Oracle Applications Patching Procedures and Oracle Applications Maintenance Utilities.

Oracle Balanced Scorecard User Guide:

This guide describes how to use Oracle Balanced Scorecard to manage performance. It contains information on how to use scorecard views and objective reports.

Oracle Balanced Scorecard Administrator Guide:

This guide describes how to set up and administer Oracle Balanced Scorecard and scorecard systems. For scorecard designers, this guide explains how to design and prototype scorecards and measures. It also explains how to move scorecards into production. For administrators, this guide explains how to generate the database schema; load data; manage user and scorecard security; and migrate scorecards to other instances.

Oracle Daily Business Intelligence Implementation Guide:

This guide describes how to implement Oracle Daily Business Intelligence, including information on how to create custom dashboards, reports, and key performance indicators.

Oracle Daily Business Intelligence User Guide:

This guide describes how to use the preseeded Daily Business Intelligence dashboards, reports, and key performance indicators.

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle **STRONGLY RECOMMENDS** that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless

otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Introduction

Overview

Oracle Balanced Scorecard (BSC) turns performance management systems into active management tools by enabling their deployment across an organization, using powerful, web-enabled graphical interfaces. BSC links strategy to management action by placing the organization's key performance indicators and data right on managers' desktops, giving them quantifiable targets to achieve, aligned with the organization's strategy. Also, by illustrating the cause-and-effect relationships between key performance indicators, BSC provides managers with a clear understanding of how their decisions impact not only their direct area of responsibility, but also other departments, and the overall company strategy.

Balanced Scorecard Architecture

Oracle Balanced Scorecard is comprised of two components each with a separate architecture

- **Balanced Scorecard:** This component is an Oracle Self-Service application that is used to perform the majority of the designer, viewer, and administrative tasks.
- **Balanced Scorecard Architect:** This component is used to perform a select set of designer and administrative tasks.

Balanced Scorecard uses a 3-tier architecture which is comprised of a database tier, a web server tier, and a desktop tier. Users connect to Balanced Scorecard through any java enabled web browser. The web server tier provides business logic and generates dynamic web pages. The presentation layer of the web server, which is part of the application tier, and the business logic for Balanced Scorecard are implemented as Java Servlets and JavaServer Pages (JSP) running on Apache JServ. Apache JServ, a module of Apache Web Server, implements the Java Servlet API for running server side Java.

Balanced Scorecard shares the common Oracle Self-Service Web Applications signon to

provide a common gateway to all Self-Service Applications. When you first access Balanced Scorecard, you will see the Oracle Self-Service Web Applications home page. Enter your user name and password for authentication to begin your session. You will then be redirected to the Apache Web Server to begin Balanced Scorecard activity.

Balanced Scorecard Architect is installed in client-server mode and is connected to an enterprise database.

Balanced Scorecard Architect includes the following features:

- **BSC Setup:** Use this feature to set up Balanced Scorecard after installation. During set up you can register BSC systems (instances), administer database privileges, import data, upgrade systems from previous releases, and migrate data between systems.
- **BSC Architect:** Use this feature to create and configure scorecards, indicators, groups and datasets; and set calculation and other options.

Install Balanced Scorecard

Overview of Installing Balanced Scorecard

To install Balanced Scorecard review the following prerequisites and complete the install tasks listed below.

Prerequisites

- Back up your Balanced Scorecard system(s).
- Uninstall previous releases of Balanced Scorecard Architect.
- Shut down all Oracle Applications, Services, and your Web Browser.
- Confirm that you have administrative rights and disk space on the Windows NT system.

Install Tasks

- Review System Requirements, page 2-1
- Install Oracle 8.0.6 Utilities, page 2-2
- Install Oracle 9i Release 2 (XP Only), page 2-3
- Install Oracle Balanced Scorecard Architect, page 2-4
- Install Oracle Balanced Scorecard Expert, page 2-5
- Install Oracle Portal , page 2-9

Review System Requirements

The following are the requirements for Balanced Scorecard and Balanced Scorecard Architect.

Balanced Scorecard Requirements

- Oracle E-Business Suite Release 12

Balanced Scorecard Architect Requirements

- Pentium CPU, or equivalent, with a minimum processor speed of 266 MHz.
- Windows NT version 4.0, Service Pack 3.
- Minimum Disk Space: 65 MB.
- Minimum recommended memory: 64 MB.
- Oracle 8.0.6 Client and Microsoft Excel 95 or above.
- Windows XP users must install the Oracle 9i Release 2 client in addition to the Oracle 8.0.6 client.

Install Oracle 8.0.6 Utilities

Install Oracle 8.0.6 Utilities:

Balanced Scorecard Architect requires Oracle 8.0.6 Utilities.

1. Download the Oracle Balanced Scorecard 8.0.6 client for the Architect patch 1992496 from Oracle *MetaLink* and copy to a temporary directory on your desktop. Ensure that you choose the patch file for your platform.
2. Unzip the patch.
3. Run the setup.exe program. To ensure that you do not overwrite other utilities from a previous installation, create a different home for the Oracle 8.0.6 utilities. Remember also that this home must be the same home directory where you will install Balanced Scorecard Architect.
4. Select the Oracle8 client installation.
5. Select the user.
 - If you are using Windows XP, select Application User.
 - If you are using Windows NT or other version, select Administrator.

You will receive a notice that required support files will be installed to the ORACLE_HOME\bin directory.

Note: Ensure that the primary home is the Oracle 8.0.6 home. If you

have a Home Selector utility under Oracle Installation Products, use this utility to configure the primary home.

6. Install the documentation.
7. Reboot your machine for all changes to take effect.

Install Oracle 9i Release 2 (XP Only)

Install Oracle 9i Release 2 (XP Only):

Install Oracle 9i Release 2 if you are using Windows XP only.

1. Install Oracle 8.0.6 Client. See: Install Oracle 8.0.6 Utilities, page 2-2.
2. If you have a previous version of Oracle Client or a personal version (other than Oracle 8.0.6) , then uninstall Oracle Objects for OLE.

Note: You must uninstall the Oracle Objects, so Oracle 9i can install the newest components.

3. Install Oracle 9i Client Release 2 (9.2.0.1.0) for Windows. Ensure that you select the Administrator Installation.

Refer to the Oracle 9i installation documentation for more information.

Note: Oracle Object for OLE, being a COM component, is not a MULTIPLE ORACLE HOME product. Be sure to install it under the Oracle 9i client home. You can verify that the "oo4o" directory has been created under the Oracle 9i Client home.

4. Install Balanced Scorecard Architect under the Oracle 9i Client home.
5. Once these steps are complete, go to Post-Install Tasks, page 2-10.

Post installation Note for Windows XP users:

- Be sure to define the TNS service name under both 9i and 8.0.6 Homes.
- Create the ODBC Data Source in 9i only.

Install Oracle Balanced Scorecard Patches

Install Oracle Balanced Scorecard Architect:

To enable the Balanced Scorecard Architect features, apply the Architect patch to your client system.

1. Apply the Oracle Balanced Scorecard Architect Patch.

Note: Microsoft Windows XP users must install a new version of Oracle9i Release 2 Client.

If you are working with multiple language settings (MLS), ensure that the NLS_LANG environment variable is set correctly in your Control Panel before you run your Oracle Balanced Scorecard Architect or Oracle Balanced Scorecard Manager.

To set this environment variable, navigate to the Control Panel, choose System, and then choose the Environment tab.

See Choosing a Locale with the NLS_LANG Environment Variable, Oracle Database Globalization Support Guide for the proper format and the list of available values. For example, to set a Korean locale in a Korean OS with KSC5601 16-bit Korean encoding, the format is NLS_LANG=Korean_Korea.KO16KSC5601.

1. Download the Oracle Balanced Scorecard Architect patch (5506102) from Oracle *MetaLink* and copy to a temporary directory on your desktop.
2. Unzip the patch.
3. Launch the BSC Architect installation program, setup.exe, from the client\win32\OBSC_Architect\install\win32 directory on the patch in the previous step.

2. Choose Deinstall Products, then go to your Oracle 8.0.6 Utilities path to check whether you have previous releases of BSC Architect installed in your Oracle 8.0.6 home. If you do, remove the BSC components.

After removing any existing Balanced Scorecard components (or if there were none), close the Deinstall window, then choose Next to start the BSC Architect installation.

3. The File Locations window displays the products.jar directory path. If you do not see products.jar, choose the Browse button to locate the file on the Balanced Scorecard CD. Otherwise, do not change the default path.

Choose a destination Oracle Home for your Balanced Scorecard installation. This

must be the same Oracle 8.0.6 home you created previously. If you have more than two homes, change the Name and Path to that of your Oracle 8.0.6 home.

Note: If you are Windows XP user and have installed Oracle 9i, you must select the Oracle 9i home instead of the Oracle 8.0.6 home.

Choose Next.

4. If you have not previously installed the Oracle 8.0.6 utilities you will receive an error message. Otherwise, you can proceed selecting the options to install. Select the first option to install all Balanced Scorecard modules. This should be the selection if you are installing for the first time. Custom can be selected to install or update particular components of the application. Click Next to continue. A summary window appears.

5. In the summary screen, ensure that you have the correct selections. If you need to change a selection, you can click Previous and revise your selections. When you are finished, choose Install to launch the install process.

The install process creates the installactions.log file in the \logs directory noted on the Install Process screen. This file logs any errors that occurred during installation. It is recommended that you check the error log after installation and reinstall any components that failed.

6. Reboot your computer for the changes to take effect.

Install Formula One:

To enable the Simulation Tree feature, apply the appropriate Formula One patches to your server and client systems.

1. On your server system, apply the Formula One Server Side Patch 5521128.
2. On your client systems, apply Formula One Client Side Patch 5550473.

Note: Disable the Oracle Balanced Scorecard headless support feature in an R12 environment. See: Note 398440.1 on Oracle *MetaLink*.

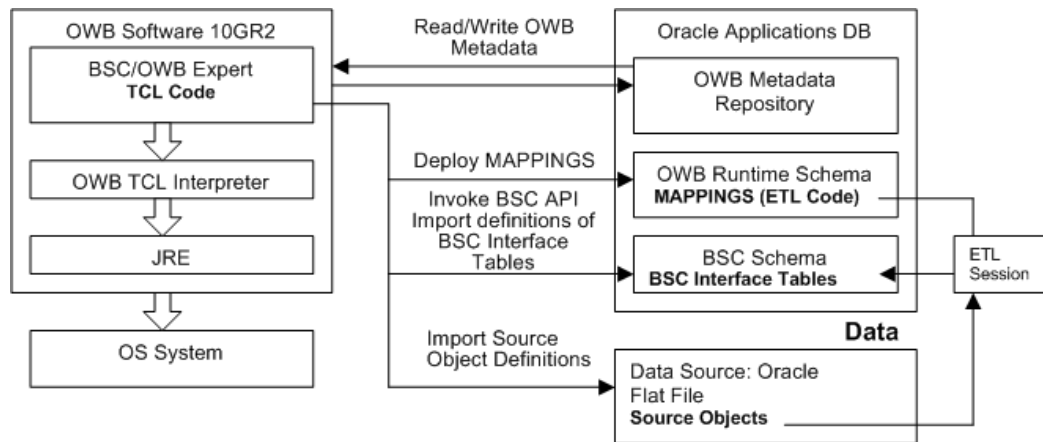
Install Oracle Balanced Scorecard Expert

Oracle Balanced Scorecard Expert allows Balanced Scorecard customers to use Oracle Warehouse Builder (OWB) to:

- Define the data source for Balanced Scorecard objects

- Define mappings between Balanced Scorecard Interface Tables and Data Source structures
- Generate and deploy "Extract Transform Load" (ETL) code for the Balanced Scorecard application instance.

An "expert" is defined as an OWB Metadata file that has incorporated TCL code executed in an OWB environment.



The Balanced Scorecard Expert does the following:

- Setup BSC_PROJECT and create locations for BSC and OWBRT runtime schemas in the OWB Metadata Repository.
- Create Oracle modules for Balanced Scorecard and OWB runtime schema.
- Import Balanced Scorecard Interface Tables and Source Objects into the mapping editor.
- Manage mappings using create/edit/delete operations in BSC Expert.
- Generate and deploy the ETL code.
- Execute ETL Code in OWB runtime schemas using OWB Control Center.

Prerequisites

- Balanced Scorecard 5.3 (11i.BSC.J) patch 3995622
- Balanced Scorecard 5.2 (11i.BSC.I) patch 3894719
- Oracle Warehouse Builder 10gR2

Balanced Scorecard Expert is delivered with OWB 10gR2 as a metadata file (MDL).

- ❑ Oracle Applications 11.5.7 or higher

Install patch 3995622:

1. This patch contains the PL/SQL API used by OWB Expert to fetch information about Balanced Scorecard objectives and their corresponding Interface Tables. Download the patch from Oracle *MetaLink* and follow the instruction provided in Readme.txt file.

Install OWB 10gR2. :

1. To create the OWB Metadata Repository, install OWB 10gR2 on the host where the Oracle Applications database instance is running.

See: *Oracle Warehouse Builder Installation and Configuration Guide, 10g Release 2 (10.2) for Windows and UNIX.*

Create OWB Metadata Repository:

1. Navigate to the OWB \$ORACLE_HOME/owb/bin/unix directory for an OWB UNIX installation or to \$ORACLE_HOME\owb\bin\win32 for an OWB Windows installation.
2. Start the Repository Assistant:

```
./reposinst.sh&          (UNIX)  
reposinst.bat           (Windows)
```
3. Select "Advanced Setup".
4. Provide SYS user password, host, port, and sid information.
5. Select "Manage a Warehouse Builder repository owner".
6. Select "Create a new Warehouse Builder repository owner".
7. Provide the Repository Owner User Name and the Repository Owner Password:

OWBREP/OWBREP

OWBDEP/OWBDEP

Note: Information about the OWB Repository schema is seeded in FND data structure and has default passwords for the OWB Metadata Repository Schema and the OWB Runtime Repository Schema:

The OWB Metadata Repository schema (OWBREP) and OWB Runtime schema (OWBDEP) that you created will be used for

deployment of the ETL code

8. Execute the FNDCPASS command on the administration tier to propagate the OWBREP and OWDEP passwords into the Oracle Applications instance. The passwords must be the same as OWBREP and OWDEP passwords used during OWB Repository creation and OWB Runtime schema creation.

```
FNDCPASS apps/<apps password> 0 Y system/<system password> ORACLE  
owbrep<owbrep password>
```

```
FNDCPASS apps/<apps password> 0 Y system/<system password> ORACLE  
owbdep<owbdep password>
```

For example:

```
FNDCPASS apps/apps 0 Y system/manager ORACLE owbrep owbreppwd
```

9. Provide tablespace for data, indexes, temporary data and snapshots.
10. Navigate to Next > Next > Finish.

Create OWB Runtime Schema in Oracle Applications Database Instance:

1. Start the OWB software Client.

On UNIX:

```
cd $ORACLE_HOME/owb/bin/unix  
./owbclient.sh&
```

On Windows:

```
cd OWB10gR2\owb\bin\win32  
owbclient.bat
```

2. Log into the OWB Metadata Repository that was created in Oracle Applications Instance (OWBREP schema).

Upload into OWB Metadata Repository Balanced Scorecard Expert definition:

1. Log into the OWB Metadata Repository created in the Oracle Applications Instance (OWBREP schema).
2. Navigate to Design > Import > Warehouse Builder Metadata...
3. Provide the expert definition file name and location. The BSCEXPRT.MDL file is located in the following directory: \$ORACLE_HOME/owb/experts/bsc.
4. Select the following import options:

- Import All Objects from File
 - Create New Metadata only
 - Match by Universal Identifier.
5. Upload Metadata to the OWB Metadata Repository.
 6. Check log file for warnings and errors.

Install Oracle Portal

To install Oracle Portal:

1. Install Oracle Portal (Optional)

If you plan to use Oracle Balanced Scorecard portlets and you have not installed Oracle Portal, please refer to the following documents for configuration information:

- Oracle Portal 3.0.9 (Note 146469.1)
- Oracle Portal 9.0.4 (Note 233436.1)
- General information on Oracle Portal and Oracle Balanced Scorecard is available at Note 303980.1

If you already have Portal functionality and Web Provider installed, please refer to the *Oracle Balanced Scorecard Administrator Guide*.

For customers who are already using Oracle Balanced Scorecard Portlets from previous releases: Oracle Balanced Scorecard Database Provider portlets are de-supported. Customers are encouraged to uptake the following Balanced Scorecard Web Provider portlets:

- Graph Portlet
- List of Objectives Portlet
- Custom View Portlet

Customers who are upgrading from Oracle Balanced Scorecard 4.8.x, who have configured Database Provider portlets, and who want to keep these portlets need to apply patch (2701283) for backward compatibility. Refer to the *Oracle Balanced Scorecard Administrator Guide* for instructions on how to configure portlets.

Post Install Tasks

1. Define the Service Name

Before you connect to Balanced Scorecard, you must define a service name for the database you are connecting to. The service name is a logical name stored locally that refers to the database. To define the service name, follow these steps.

1. Go to Start > Programs > Oracle 8.0.6 Home > Oracle Net8 Easy Config
2. At the first prompt, type in a New Service Name. If you wish, you can modify an existing Service Name by clicking Modify and choosing a name from the list of Existing Net Service Names. When you are finished, click Next.

Note: Make a note of this new service name since you will need it later during Balanced Scorecard Installation.

Note: Windows XP users with Oracle 9i installed, need to define the service name in Oracle 9i. Refer to "Define Service Name in 9i". and be sure to install it under the Oracle 9i client home.

- Be sure to define the TNS service name under both 9i and 8.0.6 Homes.
 - Create the ODBC Data Source in 9i only.
3. At the next prompt select TCP/IP (Internet Protocol), then choose Next. If you are configuring a personal database, you may choose a local connection.
 4. You are prompted for a Database SID, which is the Oracle database instance to which you want to connect. This value is the same as your global database name. When you have entered a name, choose Next to continue.
 5. The next screen gives you the option to test the database. Enter a valid Username and Password, then choose the Test button. If you receive an error message the database username or password are incorrect, or your database is not properly configured. Change your login information and try again.

If your connection is not successful, you may want to check the following:

- Port number may not be the one used by the listener on the server.
- ORACLE_SID may not be correct.

- Userid or password may not be correct.
 - Listener on the server may not be up.
 - Server name may not be correct.
6. Restart your computer to makes these changes effective.

2. Define Service Name in 9i (XP Only)

Only perform this step if you are a Windows XP user.

1. Go to Start > Programs > Oracle 9i Home > Configuration and Migration Tools > Net Configuration Assistant.
2. Select Add.
3. Select Oracle 8i or the latest version.
4. Enter the Service Name.
5. Select the type of protocol. For example: TCPIP.
6. Enter the Host Name and Port.
7. Enter the Service Name.

3. Define the Data Source Name (DSN).

The Data Source Name is an ODBC Driver that connects the service name for your database to a computer host name. To define a data source name, follow these steps.

1. From Windows NT, go to Start > Settings > Control Panel > ODBC.
2. Choose Add button.

On the Create New Data Source window, select the entry for Oracle ODBC Driver, version 8.00.06.00, then choose Finish.

Note: If you are Windows XP user and have installed Oracle 9i, you must choose the Oracle ODBC Driver 9i version.

3. Enter your Service Name (for example, bsc115) in the Data Source Name and Service Name fields. If you wish, you can enter a description in the Description field. Press OK. Your data source name is configured.

Configure the System

After you've created the DSN and service name, use the BSC Setup Wizard to register your new Balanced Scorecard system. For more details about the Setup Wizard, see the Setup chapter in *Oracle Balanced Scorecard Administrator Guide*.

4. Configure the System.

Note: Before beginning these steps, check your Oracle Installation Products - Home Selector to ensure that your Oracle Primary home is 8.0.6.

If you are working with multiple language settings (MLS), please make sure that NLS_LANG environment variable is set correctly in your Control Panel before you run your BSC Architect or BSC Manager.

To set the environment variable, go to the Control Panel, choose System, and then choose the Environment tab. Please refer to the Oracle Applications Documentation - National Language Support Guide, "Setting Up an NLS Environment, Choosing a Local with NLS_LANG" for the proper format and the list of available values.

For example, to set a Korean locale in a Korean OS with KSC5601 16-bit Korean encoding, the format is
NLS_LANG=Korean_Korea16KSC5601.

Define the Service Name in 8.0.6

1. Log into Balanced Scorecard Setup, use:

User: APPLSYSPUB

Password: PUB

2. Navigate to the BSC Setup Wizard, then choose the System Configuration tab. For more information on the Setup Wizard, see the *Oracle Balanced Scorecard Administration Guide*.
3. To register the Oracle Applications database in Balanced Scorecard, choose the Apps checkbox. The information displayed on the System Configuration tab will change, as shown in the figure below. Provide the database information requested in the Choose Registered System Name region of the window, then choose OK.

Note: Be aware that only the System Administrator has the right to login to the Architect, Manager and Setup Wizard.

5. Check the UTL_FILE_DIR Parameter

If you need to install Enterprise databases for migration purposes, check the settings for UTL_FILE_DIR parameter to make sure it points to the directory where you will load Balanced Scorecard tables.

Locate the init<sid>.ora file in the <Oracle Home>\DATABASE directory.

Within init<sid>.ora, check the settings for UTL_FILE_DIR and set as given below.

```
UTL_FILE_DIR=<directory>
```

For example:

```
UTL_FILE_DIR=c:\temp
```

If the above parameter is not set in the init<sid>.ora file, check in the file specified with the IFILE parameter.

Locate the IFILE variable and note the filename referenced in that variable.

Open the referenced file and add the parameter:

6. Log into BSC Architect.

To log into BSC Architect in Oracle Applications, use the SYSADMIN/SYSADMIN login.

7. Check the Write Access Permissions (System Administrator).

Ensure that you have granted write access permission to the following directories. Otherwise, you may encounter issues such as blue banner and some button icons not appearing: \$OA_HTML\cabo \$OA_HTML\cabo\images\cache \$OA_HTML\cabo\images\cache\en

8. Start Middle Tier Applications (System Administrator).

Start middle tier applications including Web, Forms, and Apache listeners and the Concurrent Manager.

9. Synchronize Dimension Level Objects (System Administrator).

To synchronize the dimension level objects between BSC and BIS, perform these steps:

1. Log into Oracle Applications using the System Administrator responsibility.
2. Select the Balance Scorecard Supervisor responsibility.
3. Run the "Submit Request to Validate Dim levels Table" concurrent program as a single concurrent request.
4. View the log to ensure the program completes successfully.

10. Set Cache for Oracle Portal 10g Users (System Administrator).

If you are using Balanced Scorecard Portlets in Oracle Portal 10g, perform these steps:

1. Turn off the Oracle Portal file system cache.
 1. Open the \$IAS_HOME/Apache/modplsql/conf/cache.conf configuration file at your portal server and set the following parameter:
`PlsqlCacheEnable Off`
 2. Remove the cached files.
 3. Change to the directory specified in the PlsqlCacheDirectory parameter in the cache.conf file and remove all the files under that directory.
2. Turn off the Oracle Portal Web cache.
 1. Log in to Oracle Portal as a user with administrator privileges.
 2. Navigate to the Administer tab. Then select Global Settings and select the Cache tab.
 3. Deselect the Enable Web Cache For Caching Portal Content option.
 4. In the Clear Web Cache region, enter 0 in the Maximum Expiry Time Minutes field.
3. Restart the Oracle Portal server.

Troubleshooting

If you experience trouble with your Balanced Scorecard system, review some of the following troubleshooting tips.

BSC Architect Installation

- Reboot your machine after installing or de-installing components.
- You may have some .dlls or .ocx files previously installed or in memory running at the moment of installation. However, usually the installer will not overwrite these files and you can click Ignore and continue the process.
- If you receive an I/O Error, please go to the Windows NT Task Manager and end the process jrew.exe in case this file is active.
- Be sure you review your Oracle Home selector and you have the primary home defined for Oracle 8.0.6 Utilities and Balanced Scorecard. Otherwise you will not be able to connect to the database.

- Note that the file `installAction.log` is saved in a path during installation. Please note the directory to check in case you have errors during the process. Please don't delete the file since this log is used for future installations.
- Be sure your data source name (DSN) is created with Balanced Scorecard driver version 8.00.6. If the Oracle driver is not 8.00.6, you may have to uninstall and reinstall the driver to get the correct version. To review your data source, go to Start > Programs > <New Oracle Home> > Network Administration > Microsoft ODBC Network Administrator. You can test your connection by logging into <New Oracle Home> > Applications Development > SQL with username of 'system' and password of 'manager'. If you have not created a DSN, follow the instructions below.
- If you encounter any font issues in the BSC Architect after installation, such as the substitution of '???' for characters, you must manually install the font. You can do this by editing the `obsfont.dat` file located in the <Oracle Home>\OBSC directory. For example:

```
FONT_NAME = MS Sans Serif
```

```
FONT_SIZE = 8
```

If the file does not exist you must create it.

- When you use a multi-byte character language please check if the "obsfont" accepts your language characters. You may need to change the "obsfont" to another font that supports your language characters.
- If you get the message, 'Setup wizard couldn't find the bin utilities' check to see that the file `obsfont.dat` in your <Oracle home>\OBSC directory points at your <Oracle home>\bin directory. For example:
- `ORACLE_UTILITIES_DIR = d:\ora806\bin` if ora806 is your primary home.
- If you get one of the following error messages:
 - ORA-12545 Connect failed because target or host is not found
 - ORA-12203 TNS unable to connect to destination or TNS No Listener
 check the following:
 - Make sure the DB Listener is running. Contact your database administrator for more information.
 - Verify that the Port ID and Database SID are correct for the service name you created using Net Easy Config.

Multi-language Synchronization Tables

If you already use a second language with Balanced Scorecard or if you added a second language before upgrading to 4.8.2, you must run the following script after installing Balanced Scorecard 4.8.2 in order to synchronize the MLS tables:

```
$BSC_TOP/admin/sql/BSCNLINS.sql
```

You don't need to run this script if the second language is added after installing Balanced Scorecard version 4.8.2.