

Oracle® Activity-Based Management

Installation Guide

Release 11*i*

April 2001

Part No. A85331-01

ORACLE®

Part No. A85331-01

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Contents

Send Us Your Comments	vii
Preface.....	ix
Intended Audience	ix
Structure.....	ix
Assumptions.....	xi
Do Not Use Database Tools to Modify Oracle Applications Data	xi
Related Documents.....	xi
Conventions.....	xii
Training and Support.....	xii
Training.....	xii
Support.....	xii
About Oracle Corporation.....	xii
Thank You.....	xiii
1 Introduction	
Overview	1-1
System Architecture	1-2
System Requirements	1-3
Web Browser Requirements.....	1-3
Software Requirements.....	1-3
ABM Release 11i	1-3
ABM Web Reports Release 11i	1-3
ABM Analyzer Release 11i.....	1-3

SEM Exchange Release 11i	1-3
Hardware Requirements	1-4
Database and Applications Tier	1-4
Client Tier	1-4

2 Installing ABM

Prerequisites	2-1
Apply the ABM Server Patch.....	2-1
Install Inprise VisiBroker for Java on a UNIX Platform	2-2
Install Inprise VisiBroker for Java on a Windows NT Platform	2-13
Define Profile Options	2-19
Grant User Access	2-20

3 Installing Web Reports

Technology Components	3-1
Prerequisites	3-2
Set Up the Environment	3-3
Define Values for Profile Options	3-3
Considerations for Windows NT	3-4
Create cgicmd.dat File	3-5
Grant User Access	3-6
Client Browser Setup	3-6

4 Installing ABM Analyzer

Technology Components	4-1
Prerequisites	4-2
Installing ABM Analyzer	4-3
Copy DBC File to Web Discoverer Server.....	4-3
Create the Discoverer End User Layer	4-4
Grant FND Object Privileges to EUL Owner.....	4-7
Copy ABM Analyzer Workbooks to Discoverer Server	4-7
Install ABM Analyzer Business Areas.....	4-8
Grant Access to Discoverer Administrator and User Editions	4-10
Create Applications User.....	4-12

Set the Default EUL in the Discoverer User Edition for an Applications User	4-13
Save ABM Analyzer Workbooks	4-13
Grant Workbook Access to Oracle Applications Responsibilities	4-13
Define Applications Profile Options (required)	4-15
Update Discoverer EUL Item Labels (optional):	4-16
Upgrade Any Existing ABM Analyzer Workbooks (optional):	4-18
Reference Material:	4-21
Launching ABM Analyzer from Self-Service Web Applications	4-21

5 Installing SEM Exchange

Prerequisites	5-1
Apply the SEM Exchange Server Patch	5-1
Assign Responsibility	5-2
Verify Installation	5-2
Using Earlier Versions of SEM Exchange and Oracle General Ledger with ABM	
Release 11i	5-3
Required Software Components:	5-3
Installation Procedures:	5-3

A Migrating Data From Activa 3.x

Prerequisites	A-1
Migration Process	A-2
Notes	A-4

Index

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Oracle Activity-Based Management Installation Guide, Release 11*i*

Part No. A85331-01

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
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Redwood Shores, CA 94065
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Preface

Welcome to Release 11*i* of the *Oracle Activity-Based Management Installation Guide*. Use this guide to familiarize yourself with the steps to install ABM, which includes the following components:

- Activity-Based Management (ABM)
- ABM Web Reports
- ABM Analyzer
- SEM Exchange

Intended Audience

This guide is the primary source of information about installing the Oracle ABM Products. This guide is intended for any user responsible for installing, upgrading, and configuring ABM products and their required components, including:

- Internal and external consultants
- System administrators

Structure

This manual contains the following sections:

Introduction

- Overview: Provides an overview of the Oracle ABM Products.
- System Architecture: Details the architecture options for ABM and the usage of each module of the ABM products.

- System Requirements: Describes the software and hardware requirements for deploying the ABM products.

Installing ABM

- Enterprise Database Installation: Contains the steps to deploy the enterprise technology components, including the end-user viewer.
- ABM Installation: Contains steps to install ABM and describes the basic deployment steps.

Installing Web Reports

- Technology Components: Describes the software requirements for Web Reports
- Preinstallation Tasks: Covers the tasks that must be completed prior to installing Web Reports.
- Installing Web Reports: Outlines installation tasks.
- Postinstallation Tasks: Outlines postinstallation tasks such as defining profile options and report server environmental variables.

Installing ABM Analyzer

- Technology Components: Describes the software requirements for ABM Analyzer.
- Preinstallation Tasks: Covers the tasks that must be completed prior to installing ABM Analyzer.
- Installing ABM Analyzer: Outlines installation tasks.
- Postinstallation Tasks: Outlines postinstallation tasks such as setting up the application to run correctly through the Self-Service Web Applications environment.

Installing SEM Exchange

- Technology Components: Describes the software requirements for SEM Exchange.
- Installing SEM Exchange: Describes the steps to install SEM Exchange.

Migrating Data from Activa 3.x

- Prerequisites: Covers the required tasks prior to migrating a model from Activa 3.x.

- Migration Process: Outlines the migration process from Ariba 3.x to Ariba 11i.

Assumptions

This guide assumes that you have a working knowledge of Oracle's Ariba products. If you are not familiar with these applications, we suggest you attend one or more of the related training classes that are available through Oracle Education Services. See "[Training and Support](#)" on page -xii for more information about Oracle training.

Do Not Use Database Tools to Modify Oracle Applications Data

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications 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 unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, the system 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 lost the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Consequently we STRONGLY RECOMMEND that you never use SQL*Plus or any other tool to modify Oracle Applications data unless otherwise instructed.

Related Documents

You may wish to consult these related documents (for Release 11i) for additional information:

- *Oracle Activity-Based Management User Guide*
- *Oracle Ariba Analyzer User Guide*
- *Oracle SEM Exchange User Guide*
- *Installing Oracle Applications*

Conventions

The following conventions are used in this manual:

Convention	Meaning
<i>italicized text</i>	Italicized type indicates the name of an Oracle reference manual.
boldface text	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
Courier Text	Identifies command line examples.
< >	Angle brackets enclose user-supplied names.
[]	Brackets enclose optional clauses from which you can choose one or none.

Training and Support

Training

Oracle offers a complete set of formal training courses to help you and your staff master each application product. You have a choice of educational environments. You can attend Oracle applications courses at any Oracle Education Center, or you can arrange for Oracle trainers to teach at your facility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs.

Support

From on-site support to central support, Oracle's experienced professionals provide the help and information you need to keep the ABM Solution working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, in managing an Oracle server, and in your hardware and software environments.

About Oracle Corporation

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 45 software modules for financial management, supply chain management,

manufacturing, project systems, human resources, and sales and service management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers, and personal digital assistants, enabling organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 140 countries.

Thank You...

Thank you for using *Oracle Activity-Based Management Installation Guide*.

We value your comments and feedback. At the front of this guide is a reader's comment form you can use to explain what you like or dislike about this product.

Introduction

This chapter provides an overview of the architecture, options, and system requirements of the Oracle Activity-Based Management product suite.

Overview

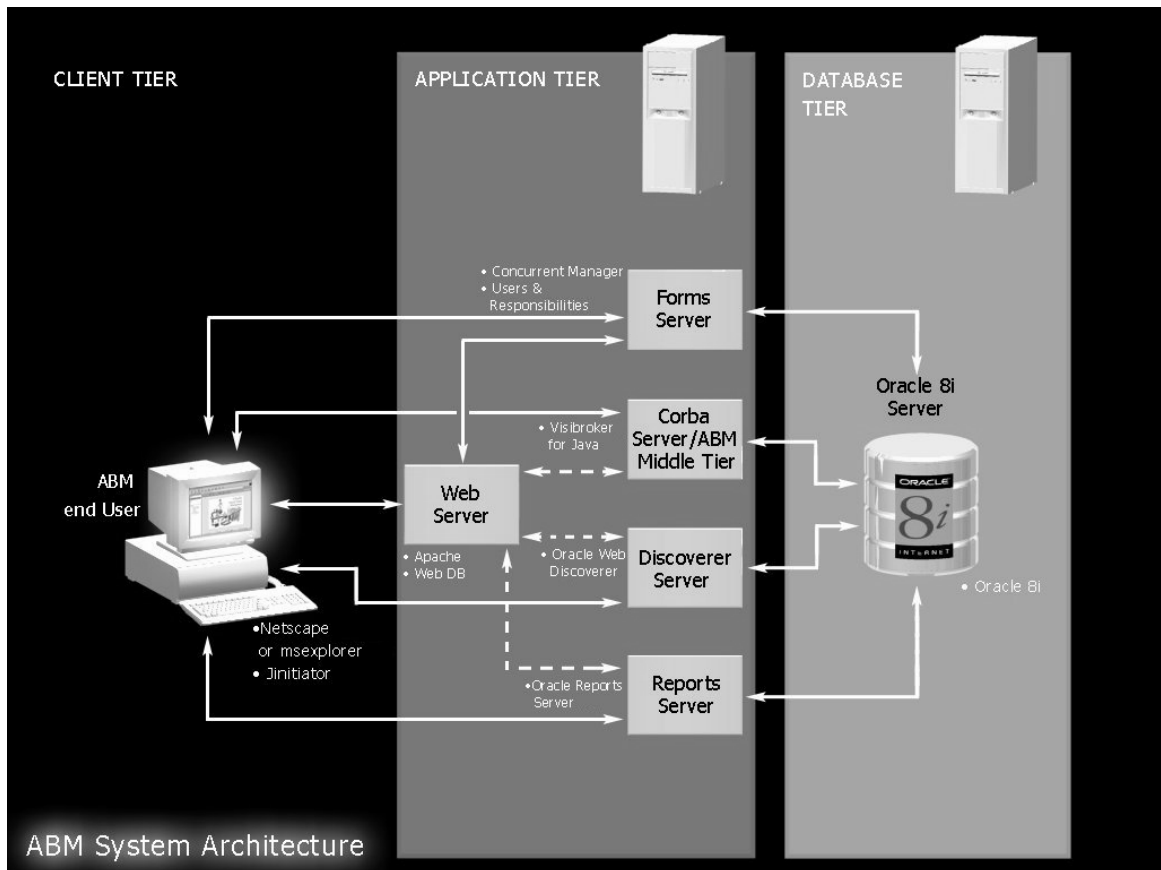
ABM products include:

- ❑ **Activity-Based Management (ABM)** — part of Oracle’s Strategic Enterprise Management (SEM) suite of analytical applications. ABM is an enterprise wide activity-based costing and management application that supports any ABC methodology in any industry. ABM provides flexible modeling to allow profit and loss analysis to occur at any level in the organization. Activity-based analysis of profitability provides new decision making foundation for customer profitability, accurate product and service profitability, and volume-based forecasting of expenses, capacity, and resources.
- ❑ **ABM Analyzer** — a relational OLAP reporting and analysis solution specifically created for ABM. It gives users throughout an organization the ability to generate multidimensional custom reports without writing any code. It uses Oracle Discoverer’s tools to provide high performance and an easy-to-use interface to select information, which reduces the cost of installing a customized solution to allow users access to the information they need for their decision processes. Using ABM Analyzer, all users can have customized reporting to suit their specific needs.
- ❑ **SEM Exchange** — an end-user controlled, rules-based systems integration process that extracts data from Oracle General Ledger and transfers it to Oracle ABM, enabling enterprise Activity Based Costing and Management (ABC/ABM) models. SEM Exchange provides the bridge between traditional accounting for financial reporting and activity-based management, and it

enables state of the art performance management and profitability analysis decision making.

System Architecture

ABM is a Web-based end-user tool that can be deployed in a three-tier architecture. The ABM end-user connects to an Oracle Applications database server through a Java-enabled Web browser and a middle-tier server. The middle tier consists of a Web server, forms servers and Internet Interoperability Protocol (IIOP) servers.



System Requirements

This section outlines the system requirements for the ABM products, including requirements for the web browser, software, and hardware.

Web Browser Requirements

To use the ABM products, your users must be running a Java-enabled web browser. The desktop client requires a network connection to the Oracle Applications Release 11i application environment. Recommended web browsers are Netscape Communicator 4.5 or higher and Microsoft Internet Explorer 5.0 or higher.

Software Requirements

ABM Release 11i

- Oracle Applications Release 11i, with Self-Service Web Applications (SSWA) implemented
- Inprise VisiBroker for Java 3.4, included on the Oracle ABM Release 11i CD-ROM

ABM Web Reports Release 11i

- Oracle ABM Release 11i, installed and configured

ABM Analyzer Release 11i

- Oracle ABM Release 11i, installed and configured
- Oracle Discoverer Release 3.1.42
 - Administration Edition
 - User Edition
- Oracle Web Discoverer Release 3.3.59
- Oracle Web Discoverer Viewer Release 3.3.59

SEM Exchange Release 11i

- Oracle ABM Release 11i, installed and configured
- Oracle General Ledger Release 11i implemented

Note: Please check Oracle MetaLink for the most up-to-date information on required versions of the web browser and the JInitiator plug-in. The *Oracle Applications Release Notes, Release 11i* and *Oracle Applications Installation Update Notes* are also available on MetaLink.

Hardware Requirements

Database and Applications Tier

Check the guide *Installing Oracle Applications* for Release 11i for information about database and applications tier hardware requirements.

Check *Oracle Discoverer 3.1 Installation and Upgrade Guide* for information about Oracle Discoverer hardware requirements.

Check *Oracle Web Discoverer 3i Installation and Administration Guide* for information about Oracle Web Discoverer hardware requirements.

Client Tier

- A Pentium-based PC, or equivalent, with a minimum processor speed of 266 MHz.
- Minimum Disk Space of 100 MB.
- Minimum recommended memory of 128 MB.

Installing ABM

This chapter covers the steps for installing ABM.

Prerequisites

- ❑ Install and configure Oracle Application Release 11i. See: *Installing Oracle Applications, Release 11i*.
- ❑ Deploy Oracle Self-Service Web Applications (SSWA) on a server against which user authentication is performed. See: *Oracle Self-Service Web Applications Implementation Manual, Release 11i*.

Apply the ABM Server Patch

This procedure installs the ABM patch in your Oracle Applications Release 11i environment. Repeat this procedure for every server in this environment, including the administration server, concurrent processing server(s), Forms server(s), reports servers, and Web server(s).

For Additional Information See:

- AutoPatch, *Maintaining Oracle Applications, Release 11i* for your platform
-
-

Caution:

- Check your log after installing each patch driver. The log is located in the \$APPL_TOP/admin/<dbname>/log directory.
 - Backup the log file before installing the next patch driver.
 - Resolve any issues with the current patch driver before proceeding to run the next patch driver.
-
-

▶▶ To apply the ABM product patch:

1. Log in to your Oracle Applications Release 11i environment using the Applications owner account.
2. Choose a patch directory.
3. Copy the ABM patch 1588595 from the Oracle ABM Release 11i CD-ROM to your patch directory. Make sure to choose the patch file for your platform.
4. Unzip the patch file for your platform.
5. Use ADPATCH to apply the patch drivers in the following order:
 - c1588595.drv (should be applied to all servers in your Release 11i environment).
 - d1588595.drv (should be applied to the Administration server only).
 - g1588595.drv (should be applied to all servers in your Release 11i environment).
6. (On the Administration server only) Run ADADMIN, from the Maintain Applications Database Objects menu, select the Compile APPS schema(s) option.

Install Inprise VisiBroker for Java on a UNIX Platform

This section explains how to set up Inprise VisiBroker for Java in the middle tier on a UNIX platform. It also provides the steps needed to start the ABM Java Server process.

1. Sign in to the account that has access to the web server file system.
2. Install VisiBroker for Java 3.4

VisiBroker for Java 3.4 is available on the Oracle ABM Release 11i CD-ROM. It is located in the VisiBroker directory under the corresponding platform subdirectories.

You can run the Oracle Installer in one of two modes: Character or Motif.

Note: You must set the TERM variable for both Character and Motif modes.

To run Oracle Installer in character mode:

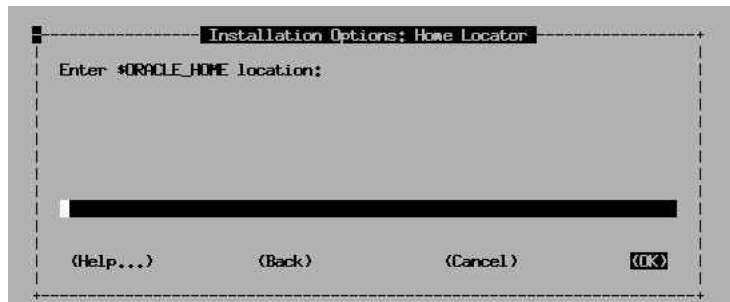
To run in character mode, enter the commands:

```
$ cd /<CD-ROM>/VISIBROKER/<platform>/VBJ/orainst
$ orainst /c
  or
$ orainst
```

(where \$ is the unix command prompt)

You will see the character mode version of the Installation Options: Home Locator window. In this window, use the Tab Key to move your cursor.

Figure 2-1 *Installation Options: Home Locator Window*



To run Oracle Installer in Motif Mode:

To run the Installer in Motif mode, the Motif libraries must be available on your UNIX machine. If they are, to run the Installer you must first set either the TERM or ORACLE_TERM environment variable to one of the terminals

supported by the Installer. The supported terminals include VT100, VT200, XSUN5, SUN5, SUN, and XSUN.

To set an environment variable in a Bourne Shell, please enter the following commands:

```
$ TERM=<supported terminal>
$ export TERM
```

To set an environment variable in a C shell, enter the following command:

```
setenv TERM <supported terminal>
```

Make sure the environment variable DISPLAY is set. For example:

```
$ DISPLAY=ap1470pc:00;export display
```

Note that the dollar sign represents the UNIX prompt. Once you've set your environment variable, enter the following command to start the Oracle Installer in Motif mode:

```
$ orainst /m
```

The Installer Setup window appears, followed by the Motif version of the Installation Options: Home Locator window.

Figure 2–2 *Installer Setup Window*



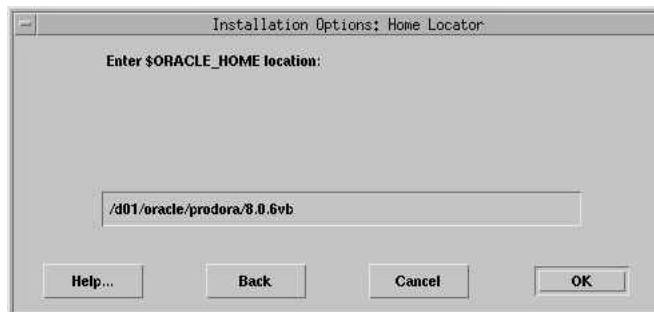
Note: The remainder of the steps below show the Motif versions of the related installation windows. The steps however are the same for either the character mode or Motif mode installation process.

To Install VisiBroker for Java

In the Installation Options: Home Locator window, enter the path for your ORACLE_HOME. You must have write permission for this path. Choose OK to continue.

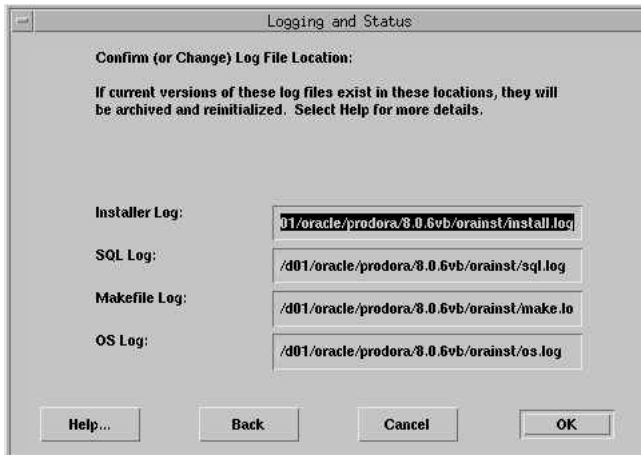
Note: This is the directory under which VisiBroker will be installed. It can be any location, and does not have to be in a valid ORACLE-HOME or APPL-TOP.

Figure 2-3 Enter Oracle_Home Location



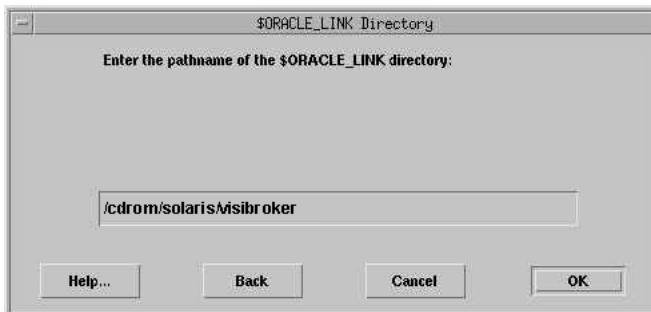
In the Logging and Status window, enter the path where the Installer, SQL, Makefile, and operating system logs will be written. Choose OK to continue.

Figure 2–4 Logging and Status Window



The \$ORACLE_LINK Directory window appears. Use this window to enter the \$ORACLE_LINK environment variable. The \$ORACLE_LINK environment variable is used for some CD ROMs that do not support long path names. If it supports the long pathname, the window below will not appear in your installation.

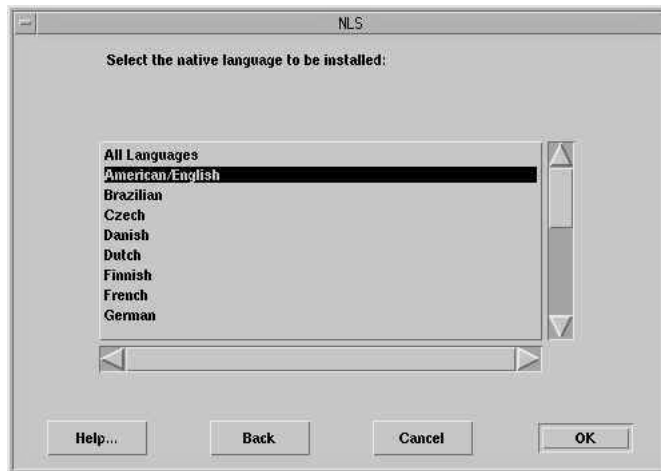
Figure 2–5 \$ORACLE_LINK Directory Window



Enter the pathname from which you are installing, then choose OK. For example, if you install directly from the CD ROM, enter /<CD-ROM>/<PLATFORM>/VBJ/VISIBROKER as the \$ORACLE_LINK directory.

The NLS window appears. Select American English, then choose OK.

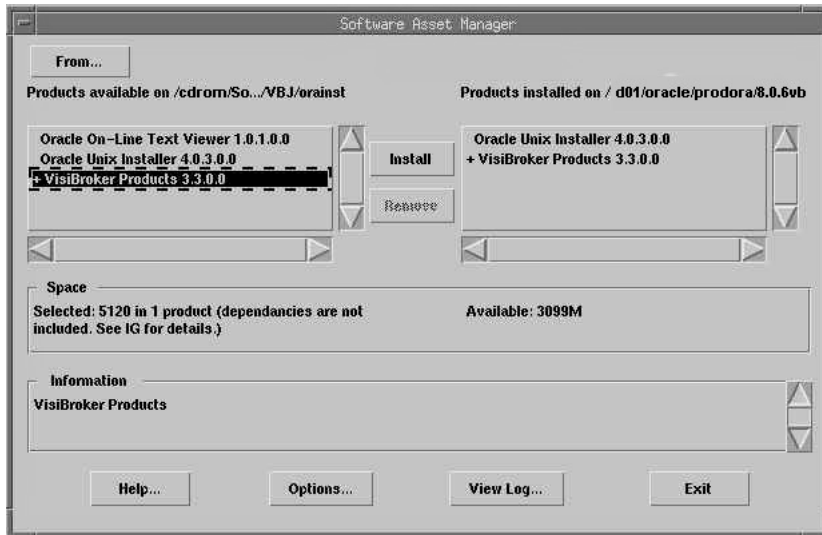
Figure 2-6 NLS Window



The Software Asset Manager window appears. Select VisiBroker Products 3.3, then choose the Install button.

Note: VisiBroker for Java 3.4 is contained within VisiBroker Products 3.3.

Figure 2-7 Software Asset Manager Window



Once the installation process has completed, choose the Exit button from the Software Asset Manager window to close the Installer.

JRE 1.1.8 is installed with Oracle Applications Release 11i. By default, it is installed in `COMMON_TOP/util/jre/1.1.8`, which is your `<JRE_PATH>`.

VisiBroker will be installed in `<ORACLE_HOME>/vbroker`. `<ORACLE_HOME>` is the directory path you entered in the previous screen; it can be any location and does not need to be a valid `ORACLE_HOME`.

The directory `<ORACLE_HOME>/vbroker` will be referred to as `<VISIBROKER_INSTALL_DIR>` in the subsequent steps.

3. Start VisiBroker OSAgent and GateKeeper in a Bourne shell.

These processes are needed to allow applet clients from the client browser (such as, Netscape Navigator or Internet Explorer) running on the client machine to communicate with middle tier objects through an IIOP protocol.

Setting Up the Unix Environment

Note: We recommend that you set these variables before starting the OSAGENT and GATEKEEPER processes in a fresh new UNIX session.

In a Bourne shell, set the following environment variable values for VisiBroker:

```
$ VBROKER_ADM=<VISIBROKER_INSTALL_DIR>/adm
$ export VBROKER_ADM

$ VBROKER_JAVAVM=<JRE_PATH>/bin/jre
$ export VBROKER_JAVAVM

$ OSAGENT_PORT=14000
$ export OSAGENT_PORT

$ LD_LIBRARY_PATH=<VISIBROKER_INSTALL_DIR>/lib:$LD_LIBRARY_PATH
$ export LD_LIBRARY_PATH

$ PATH=<VISIBROKER_INSTALL_DIR>/bin:$PATH
$ export PATH

$ CLASSPATH=<JRE_PATH>/lib/rt.jar:<JRE_PATH>/lib/i18n.jar
$ export CLASSPATH
```

Notes:

- <JRE_PATH> could correspond to \$OA_JRE_TOP in an Oracle Applications 11i environment, or to any other location where JRE 1.1.8 is installed.
- <VISIBROKER_INSTALL_DIR> is the Inprise VisiBroker product installation root directory. <JRE_PATH> is the root directory where the JRE has been installed.
- VBROKER_JAVAVM value is used as a Java run-time environment for VisiBroker and it must point to the jre that was installed. In general, this value can point to either Java or jre shell script, and it takes precedence over any Java or jre in the PATH setting. If this environment variable is not defined, VisiBroker looks for Java in your PATH setting.

- Make sure that the PATH value above does not contain any components that can conflict with the VisiBroker path settings. If another software application contains a separate VisiBroker as its component, its path settings could conflict with the setting of VisiBroker that you just installed. For instance, Oracle Application Server or Oracle Discoverer contain their own VisiBroker components, and their path values should not exist in the PATH for VisiBroker above.
- OSAGENT_PORT is the port number on which the osagent process runs. The default number is 14000. This port number should be different from the port number of your GateKeeper process (the exterior_port variable mentioned below), when you configure the gatekeeper property file.
- Every time you start OSagent and GateKeeper, you must perform the steps above.

Create Gatekeeper Properties file

This file contains GateKeeper configurations. The file is created in the directory <VISIBROKER_INSTALL_DIR>/bin

Note: This step is needed only once after VisiBroker installation.

If the gkconfig utility is available in your <VISIBROKER_INSTALL_DIR>/bin directory, then you can run this utility to set up your GateKeeper configurations and save the properties into a file named gatekeeper.properties. If the gkconfig utility is not available, you can use a text editor to create or edit the gatekeeper.properties file:

Note: Set your DISPLAY environment variable appropriately prior to proceeding, see instructions on page 2-4.

- Run gkconfig from <VISIBROKER_INSTALL_DIRECTORY>/bin.
- On the General tab, make sure that the Enable Callback checkbox is checked and that the Log Level is set to Quiet. Also make sure to enter the IOR file location.
- On the Exterior tab, set the Exterior Port to a port that is not being used. See the VisiBroker installation documentation for more details.

- On the Properties tab, create a new property with the following values:

Name=ORBagentAddr	The name is case sensitive. Be sure to type it exactly as it is shown here.
Value=<IP address of osagent>	To identify the address of a host machine, type the command 'ping -ns <machine name>' from a UNIX command prompt.

The gatekeeper.properties file should have the following contents. (ORBagentAddr line should be manually added after using gkconfig utility.)

```

exterior_port= <port#>
enable_callbacks=true
ior_file_name= <ior file name with absolute filepath>
log_level=quiet
ORBagentAddr= <IP address of VisiBroker host>

```

The ior file is generated every time you run the gatekeeper program. This value specifies where your ior file will exist.

Example:

```

exterior_port= 15000
enable_callbacks=true
ior_file_name=/d01/prodcomn/portal/demo/gatekeeper.ior
log_level=quiet
ORBagentAddr= 111.11.111.11

```

Notes:

- For more information on the above parameters settings, please refer to Chapter 3, Gatekeeper Configuration Manager in Gatekeeper Guide located at Inprise Online Books web page:
<http://www.inprise.com/techpubs/books/vbj/vbj33/index.html>
- If you specify an invalid file path for ior_file_name, gatekeeper process will exit.

Note: When starting the OSAgent, Gatekeeper, and ABM middle tier, please record the process ID's for later use. Before starting these processes, make sure all existing ABM processes are shut down.

Start OSAgent

Use the following command to start the VisiBroker OSAgent in Console mode:

```
$ osagent &
```

Note: Use the following command to check to see if OSAgent is already running:

```
ps -ef |grep osagent
```

Start Gatekeeper

Use the following command to run the GateKeeper process in the same Bourne shell:

```
$ gatekeeper -props <gatekeeper.properties path>/gatekeeper.properties &
```

Notes:

- <gatekeeper.properties path> is where your gatekeeper.properties file exists. In order to shut down the gatekeeper, make sure the associated child processes are killed as well (e.g., kill -9 19254 -19254). This will kill 19254 (gatekeeper pid -- search for "jre" process running in the background with "ps -ef | grep jre" command) and all the processes that belong to process group id 19254 (i.e., all the processes that are child processes of 19254).
- Only one gatekeeper process should be running at a time.

The gatekeeper.ior file is generated every time you run the gatekeeper process. This file is needed to allow applet clients from the client browser to communicate with the server-side classes through an IIOP protocol. The parameter ior_file_name from the gatekeeper.properties file specifies the location where the gatekeeper.ior file will be created. The value for this parameter is <VISIBROKER_INSTALL_DIR>/bin.

Start Middle-Tier ABM Java Server Process

- Log onto Release 11i environment using the applications owner account.
- Start your middle-tier ABM Java server process by running the `abmsrvst.sh` shell script:

```
$ cd $ABM_TOP/bin
```

The syntax for running the shell script is as follows:

```
$ abmsrvst.sh <ORB_AGENT_ADDR> <ORB_AGENT_PORT> <DEBUG_MODE>
```

Use the following syntax to start the middle tier in debug mode:

```
$ abmsrvst.sh myserver 14000 Y
```

or use the following syntax to start the middle tier in non-debug mode:

```
$ abmsrvst.sh myserver 14000 N
```

Notes:

- `<ORB_AGENT_ADDR>` The VisiBroker Agent address.
- `<ORB_AGENT_PORT>` The VisiBroker Agent port.
- `<DEBUG_MODE>` If you set this parameter to Y, you can review the debug output in the file named `abmsrvst.out`.

Install Inprise VisiBroker for Java on a Windows NT Platform

This section explains how to set up Inprise VisiBroker for Java in the middle tier on Windows NT. It also provides the steps needed to start the ABM Java Server process.

1. Install Visibroker for Java 3.4.

Assuming that G: is your CD-ROM drive, the Windows NT ABM Visibroker for Java 3.4 files are located under:

```
G:\VISIBROKER\WINNT\VBJ
```

Run `Setup.exe` from this directory. Make sure that you enter the `DEFAULT_HOME` in the Oracle Home Name field at Oracle Installation Settings Window (see the figure below.)

Note: This is the directory under which VISIBROKER will be installed. It can be any location and does not have to be in a valid ORACLE_HOME or APPL_TOP.

Figure 2–8 Oracle Installation Settings

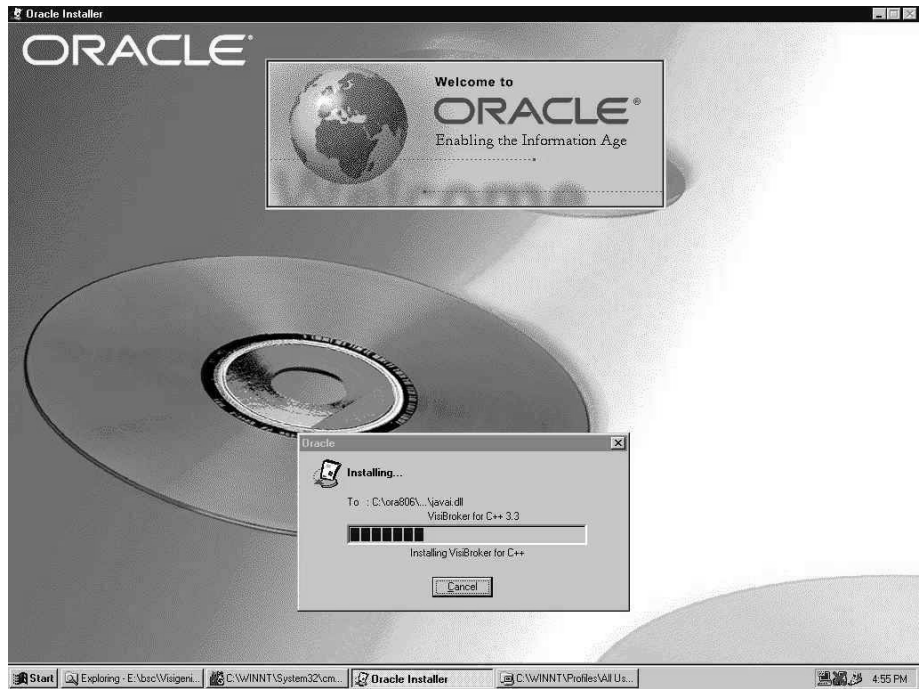


You can download JRE 1.1.8 and install it on your NT server. <JRE_PATH> in the subsequent steps is the root directory where the JRE is installed.

VisiBroker will be installed in <ORACLE_HOME>\vbroker. <ORACLE_HOME> is the directory path you entered in the previous screen; it can be any location and does not need to be a valid ORACLE_HOME.

The directory <ORACLE_HOME>\vbroker will be referred to as <VISIBROKER_INSTALL_DIR> in the subsequent steps.

In the next window, you can see the installation starts. The progress window will disappear after installation completes successfully.

Figure 2–9 Installation Progress Window

2. Start VisiBroker OSAgent and GateKeeper in a DOS shell:

These processes are needed to allow applet clients from the client browser (such as Netscape Navigator or Internet Explorer) running in the client machine to communicate with middle tier objects through an IIOP protocol.

Set Up the DOS Environment

In a DOS shell, set the following environment variable values for VisiBroker:

```
set VBROKER_ADM = <VISIBROKER_INSTALL_DIR>\adm
set VBROKER_JAVAVM = <JRE_PATH>\bin\jre
set PATH = <VISIBROKER_INSTALL_DIR>\bin
set CLASSPATH
```

Notes:

- <VISIBROKER_INSTALL_DIR> is the Inprise VisiBroker product install root directory. <JRE_PATH> is the root directory where the JRE has been installed.
- VBROKER_JAVAVM value is used as a Java run-time environment for VisiBroker and must point to the jre.exe that was installed. In general, this value can point to either a Java or jre executable, and it takes precedence over any Java or jre in the PATH setting. If this environment variable is not defined, VisiBroker looks for jre.exe in your PATH setting.
- Make sure that the PATH value above does not contain any components that can conflict with the VisiBroker path settings. If another software application contains a separate VisiBroker as its component, its path settings could conflict with the setting of VisiBroker that you just installed. For instance, Oracle Application Server or Oracle Discoverer contain their own VisiBroker components, and their path values should not exist in the PATH for VisiBroker above.
- Setting classpath without a value unsets the CLASSPATH environment variable for the DOS session. The Gatekeeper process internally uses its own classpath, and thus we need to unset the classpath before starting gatekeeper, to avoid any clash in classes.
- In general, it is better to set these environment variable values for the DOS session rather than permanently set them as system variables. This is to avoid any clash with other system environment settings that are imposed by other software components.
- OSAGENT_PORT is the port number on which the osagent process runs. The default number is 14000. This port number should be different from the exterior_port variable you set below, when you configure your gatekeeper property file.

Create gatekeeper.properties file

This step is needed only once after VisiBroker installation. This file contains gatekeeper configurations. If you have the gkconfig.exe utility available in your <VISIBROKER_INSTALL_DIR>\bin directory, then you can run this utility program to set up gatekeeper configurations and then save the properties into a file called gatekeeper.properties. Otherwise, you can manually edit the gatekeeper.properties file using a text editor:

- Run gkconfig from <VISIBROKER_INSTALL_DIRECTORY>\bin.
- On the General tab, make sure that the Enable Callback checkbox is checked and that the Log Level is set to Quiet. Also make sure to enter the IOR file location.
- On the Exterior tab, set the Exterior Port to a port that is not being used. See the VisiBroker installation documentation for more details.
- On the Properties tab, create a new property with the following values:

Name=ORBagentAddr	The name is case sensitive. Be sure to type it exactly as it is shown here.
Value=<IP address of osagent>	To identify the address of a host machine, type the command 'ping <machine name>' from a DOS command prompt.

The gatekeeper.properties file should have the following contents:

```

exterior_port= <port#>
enable_callbacks=true
ior_file_name= <ior file name with absolute filepath>
log_level=quiet
ORBagentAddr= <IP address of VisiBroker host>

```

The ior file is generated when you run the gatekeeper.exe program. This value specifies where your ior file will exist.

Example:

```

exterior_port= 15000
enable_callbacks=true
ior_file_name=C:\\orant\\ows\\4.0\\doc\\gatekeeper.ior
log_level=quiet
ORBagentAddr= 111.11.111.11

```

Notes:

- For more information on the above parameters settings, please refer to Chapter 3, Gatekeeper Configuration Manager in Gatekeeper Guide located at Inprise Online Books web page:

<http://www.inprise.com/techpubs/books/vbj/vbj33/index.html>

- If you specify an invalid file path for `ior_file_name`, the `gatekeeper` process will exit. For NT, if you put `'\'` in `gkconfig` utility, `'\\'` (double backslash) will be inserted into `gatekeeper.properties` file.

Start OSAgent

Use the following command to start the VisiBroker OSAgent in Console mode:

```
C:\> osagent -C
```

Start Gatekeeper

Use the following command to run the GateKeeper process in the same DOS shell:

```
C:\> gatekeeper -props <gatekeeper.properties path>\gatekeeper.properties
```

Note: `<gatekeeper.properties path>` is where your `gatekeeper.properties` file exists. Only one GateKeeper process should be running at a time.

The `gatekeeper.ior` file is generated every time you run the GateKeeper process. This file is needed to allow applet clients from the client browser to communicate with the server-side classes through an IIOP protocol. The parameter `ior_file_name` from the `gatekeeper.properties` file specifies the location where the `gatekeeper.ior` file will be created. The value for this parameter is `<VISIBROKER_INSTALL_DIR>\bin`.

Note:

- (Optional) You can run `'netstat -a'` to verify whether the Gatekeeper process is listening on the exterior port(15000) by opening another DOS shell, then entering the following command:

```
C:\> netstat -a
```

3. Log onto your Release 11i Environment using the Application Owner account.
4. Start your middle-tier ABM server process by running the `abmsrvst` batch file in MKS Toolkit's Korn shell or C shell. For more information about MKS Toolkit, please see: *Installing Oracle Applications, Release 11i*.

```
c:\> cd %ABM_TOP%\bin
```

Run `abmsrvst.bat` by using the following syntax:

```
$ abmsrvst.sh <ORB_AGENT_ADDR> <ORB_AGENT_PORT> <DEBUG_MODE>
```

For example:

```
c:\> abmsrvst.sh myserver 14000 Y
```

or

```
C:\> abmsrvst.sh myserver 14000 N
```

Notes:

- <ORB_AGENT_ADDR> The VisiBroker Agent address.
- <ORB_AGENT_PORT> The VisiBroker Agent port.
- <DEBUG_MODE> If you set this parameter to Y, you can review the debug output in the file named `abmsrvst_apps.out`.
- Use a new DOS window to execute the following commands.

(Optional) Run 'osfind' to see if your osagent service is running:

```
C:\> set PATH = <VISIBROKER_INSTALL_DIR>\bin  
C:\> osfind
```

Define Profile Options

Log onto Oracle Applications Release 11i Forms session. Use the Profile Options window to supply values for the profile options that define where the various components comprising ABM reside. The following table describes the profile options.

Table 2–1 ABM Profile Options

Profile Option Name	Sample Value	Description
ABM: Web Server Host	ap123.us.oracle.com (if your web server address is http://ap123.us.oracle.com)	This value identifies the DNS (Domain Name Service) name of your self service web server.
ABM: Web Server Port	80	This value identifies the self service web server port number.
ABM: VisiBroker Remote Host Address	123.45.67.890	This value identifies the IP address of the VisiBroker OS Agent Host. Note: Web Server and GateKeeper processes should run on the same host. The osagent process can run on a different host. The current release supports the configuration to run web server, GateKeeper, and osagent processes in the same host.
ABM: VisiBroker Remote Port	15000	This value identifies the VisiBroker GateKeeper port number.
ABM: ORB Gatekeeper IOR	http://ap123sun.us.oracle.com:15000/gatekeeper.ior Where ap123sun is the host machine for Gatekeeper processes; 15000 is the gatekeeper port; and gatekeeper.ior is the ior filename.	This value identifies the full URL path for the GateKeeper IOR file.
ABM: APPLET PLUGIN URL	oajinit.exe	This value identifies the JInitiator plug-in executable location
ABM: APPLET PLUGIN TYPE	application/x-jinit-applet;version=<JINITIATOR_version_in_release11i_environment>	This value identifies the JInitiator plug-in executable type

Grant User Access

At this point, all of the technology pieces have been installed. You must now grant access to ABM. This requires Oracle Applications Release 11i for assigning an appropriate ABM responsibility to the users who need access to ABM. For new

users, you may need to create user accounts; this is optional. The following ABM responsibilities are installed:

- **ABM Manager:** Access to ABM functions
- **ABM Supervisor:** Access to ABM concurrent manager processes
- **ABM Web Reports:** Access to ABM Web Reports

▶▶ **To grant user access to ABM:**

1. (Optional) If you do not want to use the provided ABM responsibilities, create new responsibilities for accessing ABM.
2. Set the Oracle Self Service Web Applications flag to true for the new responsibilities created.
3. Set the Menu option to ABM Main Menu.

See: *Oracle Applications System Administrator's Guide*

4. Assign ABM responsibilities to those users who need access to ABM.

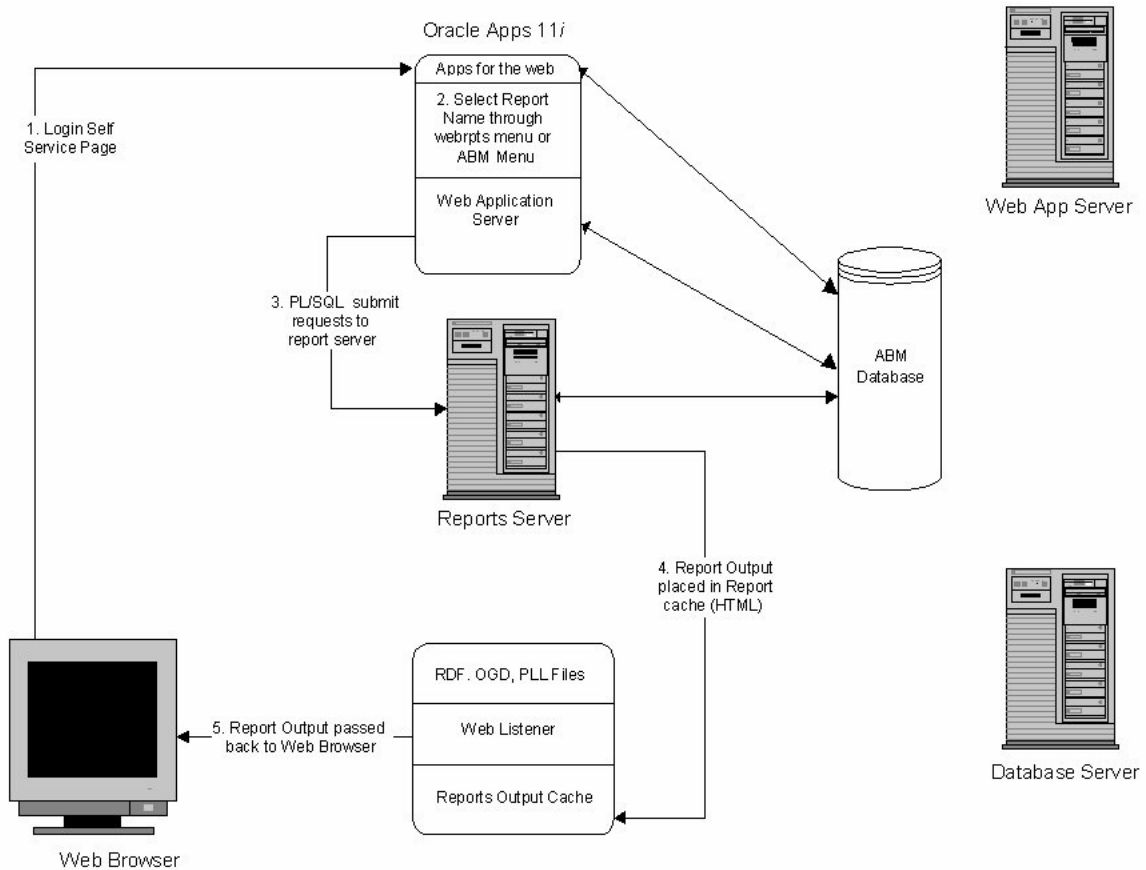
Installing Web Reports

ABM uses Oracle Developer/2000 Report Server to publish reports on the web in a HTML format. This chapter covers the steps to install and configure Web Reports for use with ABM.

Technology Components

The following diagram illustrates how the technology components are used by ABM for the Developer 2000 Reports Server.

Figure 3–1 ABM Web Reports Technology Components



Prerequisites

- ❑ Install and configure Oracle Applications Release 11*i*. For more guidance on installing Oracle Applications, (See: *Installing Oracle Applications*)
- ❑ Deploy the Self Service environment on a server against which user authentication is performed (See Oracle Self-Service Web Applications Implementation Manual Release 11*i*)
- ❑ Install and configure ABM 11*i* as described earlier in this guide.

Set Up the Environment

1. By installing the ABM patch on top of the Oracle Applications Release 11i installation, you will have copied the PL/SQL library files (i.e., files with the extension .PLL) and the Report files (i.e., files with the .RDF extension) to the following directories:
 - AU_TOP/plsql for the .PLL files
 - ABM_TOP/reports/US for the .RDF files

Note: You need to modify APPLSYS.ENV and <ORACLE_SID>.env files, which are located under APPL_TOP, to edit the following environmental variables.

2. Edit the REPORTS60_PATH (i.e., Report Server path) to include the following directories:
 - AU_TOP/plsql
 - AU_TOP/graphs
 - ABM_TOP/reports/US
3. Edit the GRAPHICS60_PATH to include the following directories:
 - AU_TOP/plsql
 - AU_TOP/graphs
 - ABM_TOP/reports/US
4. Edit the ORAPLSQLLOADPATH path to include the following directory:
 - AU_TOP/plsql

Define Values for Profile Options

Log onto Oracle Applications Release 11i Forms session. Use the Profile Options window to supply values for the profile options that define where the various technology components comprising the ABM reside. For most installations, you must supply both a site-level and a user-level value. Refer to the table below.

Table 3–1 ABM Profile Options

Profile Option Name	Sample Value	Description
ICX:Report Cache	http://<Reports Web Server>:<Web server port>/cache	This value identifies the virtual directory for Report Cache at the HTTP listener.
ICX: Report Format	HTML	This value must be set toHTML.
ICX: Report Image	http://<Reports Web Server>:<Web server port>/OA_MEDIA	This value is embedded into HTML report output so that reports can include standard image files.
ICX: Report Launcher	http://<Reports Web Server>:<Web server port>/cgi-bin/rwcgi60	This value identifies the Report Server that will run reports and produce HTML output. See: Add a Key to cgicmd.dat: page
ICX: Report Link	For Apache: http://<Reports Web Server>:<Web server port>/pls/<ORACLESID> For WebDB: http://<Reports Web Server>:<Web server port>/<ORACLESID>	This value is embedded into HTML report output so that reports can include drilldown links to other reports.
ICX: Report Server	<ABM Report Server name>	Provide the name of the Report Server

Considerations for Windows NT

- ❑ Check that the following reports environmental variables or logical names are set correctly. If the reports server is installed on a different machine than the web server and the cache is not shared between the reports server and web server, set the variables as follows:

Table 3–2 Report Server Environment Variables for Windows NT

Name	Value	Description
REPORTS60_SHARED_CACHE	YES	Specifies whether the location of Report Server cache is shared with the Web server's cache.
REPORTS60_VIRTUAL_MAP	/CACHE	The Virtual directory where the Web Server looks for the report output
REPORTS60_PHYSICAL_MAP	/d4/db/db/dev60/reports60/server/cache	The Physical location where the Web Server looks for the report output
REPORT60_OWSMAP or REPORTS60_CGIMAP	\$ORACLE_HOME/reports60/cgicmd.dat	For Web Reports Web CGI or the Reports Web Cartridge. Defines fully qualified file name/location of the RWCGI or RWOWS map file (if map file configuration is used)

Create cgicmd.dat File

Create a file named `cgicmd.dat` in the `{ORACLE_HOME}\reports60` directory. The Report Server CGI Interface uses values from this file to produce HTML output for display in a web browser. The values in the file never appear in a URL that is visible to end users. This ensures that critical data, such as database username and password, is hidden from end users. Only the user who runs the Report Server service needs to access the `cgicmd.dat` file. You can maximize security over this file by allowing only one user read access to the file.

Each line in the `cgicmd.dat` file is called a Key. You need one Key for each database that is accessed by the Report Server. The Key is referenced in the profile option `ICX: Report Launcher`.

Add a key to `cgicmd.dat` as follows:

```
<keyname>: userid=<apps database username>/<apps database
password>@<database connect string> destype=cache %*
```

Example:

```
abm: userid=apps/apps@abm115 destype=cache %*
```

Grant User Access

At this point, all of the technology pieces have been installed. You must now grant user access to the ABM WebReports. This requires using Oracle Applications Release 11*i* Forms session to assign the ABM Web Reports responsibility to those Apps users who are authorized to use the ABM Web Reports.

Client Browser Setup

You must set the browser's memory cache and disk cache size greater than 0 kilobytes. If the cache is set to 0, the user will not be able to make any edits to the page. The page will instead automatically refresh regardless of the user's choice.

- To check the cache size in Netscape, select the Edit menu option > Preferences > double-click on Advanced > Cache.
- To check the cache size in Microsoft Internet Explorer, select View menu option > Internet Options. On the General tab, click Settings.

The recommended browser settings for color and fonts are as follows:

- **Text Color:** Black
- **Browser or user colors:** Choose browser colors. For example, in Netscape the option is a checkbox titled "Always use my colors". This option should be unchecked in Netscape.
- **Variable width font:** Arial, size 10
- **Fixed width font:** Times New Roman, size 10
- **Default or Document-Specified Fonts:** Choose an option to use document-specified fonts. If there is more than one "document-specified" option, you may choose any of them.

Installing ABM Analyzer

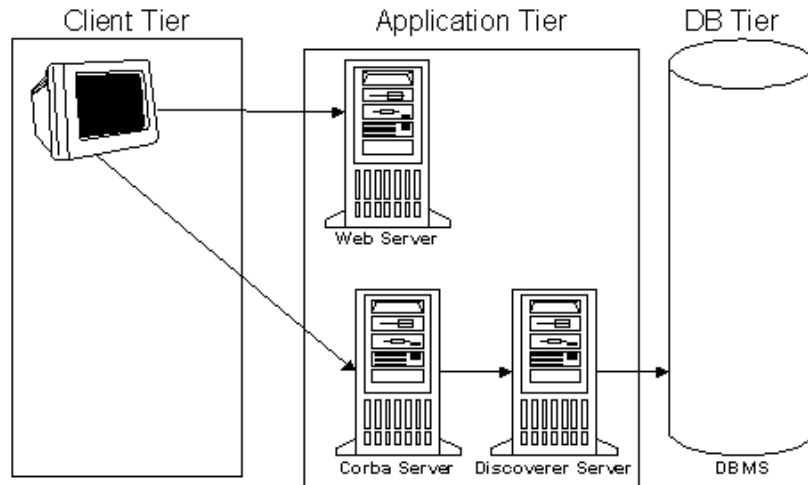
This chapter covers the steps to install and configure ABM Analyzer. Before installing, check to see that you have all the required software and hardware components. Also check with your system administrator to ensure that you have the necessary information. You will need the following information from the system administrator:

- ❑ **Database name:** The name of the database containing your ABM data.
- ❑ **Host name:** The name of the host computer that contains the ABM database.
- ❑ **Database administrator username/password:** The default is SYSTEM/MANAGER, but check with your system administrator to verify the database administrator password (this is the DB user password).
- ❑ **Administrative rights:** You may need administrative rights to use SQL*Plus to navigate databases and run scripts. When you obtain your database administrator's username/password, you should have these rights, but check to make sure.

Throughout this chapter the notation <abmdir> refers to the root directory of the ABM Release 11i CD-ROM.

Technology Components

ABM Analyzer runs in a three-tier environment with a database tier, a mid-level application tier and a client tier. Users can access the ABM Analyzer workbooks through a Java-enabled Web browser, by using Oracle Discoverer User Edition to navigate the workbooks. The back-end is a database containing ABM business objects and data, on which the ABM Analyzer workbooks are based.

Figure 4–1 ABM Analyzer Technology Components

Prerequisites

Complete these preinstallation steps before proceeding to install ABM Analyzer. The steps must be completed sequentially.

1. Install and configure Oracle Applications Release 11i. See: *Installing Oracle Applications, Release 11i*.
2. Deploy Oracle Self-Service Web Applications on a server against which user authentication is performed. See: *Oracle Self-Service Web Applications Implementation Manual*.
3. Install and configure ABM 11i. See: [Chapter 2, "Installing ABM"](#).
4. Install Oracle Discoverer Administration and User Editions. See: *Oracle Discoverer Installation Guide* and *Oracle Discoverer Administrator's Guide*.
5. Install Oracle Web Discoverer 3i. See: *Oracle Web Discoverer 3i Installation and Administration Guide*. Make sure you also install the Viewer component.

Note: To connect to the database, you will need an entry in the `tnsnames.ora` file on the Web Discoverer server.

Installing ABM Analyzer

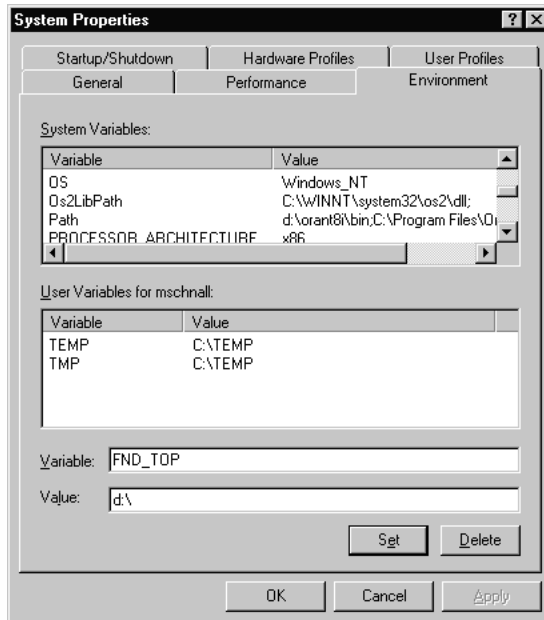
The ABM Analyzer installation process can be broken into these main steps:

1. Copy DBC File to Web Discoverer Server
2. Create the Discoverer End User Layer
3. Grant FND Object Privileges to EUL Owner
4. Copy ABM Analyzer Workbooks to Discoverer Server
5. Install the ABM Analyzer Business Areas
6. Grant Access to Discoverer Administrator and User Editions
7. Create Applications User
8. Save ABM Analyzer Workbooks
9. Grant Workbook Access to Oracle Applications Responsibilities.

Copy DBC File to Web Discoverer Server

On the server where you installed Web Discoverer, create a subdirectory named 'secure' (e.g., d:\secure). Once this is completed, follow these steps:

1. From Windows NT, open the Control Panel, then choose the System icon.
2. On the Environment tab of the System Properties window, create a new system variable named FND_TOP and set its value to the root directory (e.g., d:\) of the 'secure' subdirectory you created earlier.
3. Copy the DBC file for each applications database into the %FND_TOP%\secure\ directory. In the first two steps above, FND_TOP was set to "d:\", therefore, copy the DBC file to d:\secure\. For instructions on creating DBC files, see: *Oracle Applications Self-Service Web Applications Implementation Manual*.



4. Reboot your Web Discoverer server for the changes you've just made to take effect.
5. Make sure that the tnsnames.ora file on your Web Discoverer server has an entry for the database.

Create the Discoverer End User Layer

►► To create the End User Layer:

1. Log into Discoverer Administration Edition in application mode as username "system".
 - See: *Creating Applications-Mode End User Layer, Oracle Discoverer 3.1 Administration Guide.*



2. One of the following occurs:

If you have no EUL assigned to your user ID, a message displays asking if you want to create an EUL. Choose Yes to open the EUL Manager.

If you have an EUL assigned to your user ID, the Load Wizard displays asking you to choose a business area. Choose Cancel.

3. Choose Tools > EUL Manager. You are given options to Create/Delete an EUL or Install/Uninstall the Tutorial.



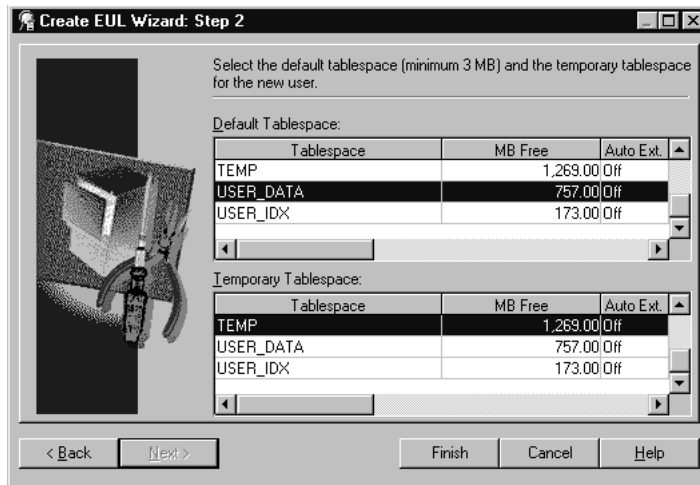
4. Choose Create an EUL.



Create a new user as the owner of the EUL. Choose 'Create a new user' and indicate whether you want to grant access to this EUL to the PUBLIC user schema. Next, enter a name for the User, as well as a Password. Choose Next when you are ready.

Notes:

- The form of the user name must be <userid>_<lang>, where <userid> is the username and <lang> is the user's language code. For example, an English-speaking U.S. user named "EUL" would be given the name EUL_US.
 - The ABM EUL name must not conflict with the BIS EUL name.
-
-



5. Select a default and temporary tablespace for this EUL. Choose Finish to create the EUL.
6. Discoverer creates an End User Layer owned by the user you specified. You are given an option to install tutorial data in the EUL. You are then asked if you wish to reconnect as the new EUL user.

Grant FND Object Privileges to EUL Owner

Grant the EUL owner privileges to FND objects. To do so, log onto the machine where you unloaded your files during ABM installation. Log into the database as the APPS user and run the following SQL script:

```
SQL> @$ABM_TOP/patch/115/sql/abmgseul.sql <EUL owner userid>
```

Example:

```
SQL> @$ABM_TOP/patch/115/sql/abmgseul.sql EUL_US
```

When the script is finished, you should receive a message, 'Grant Succeeded.'

Copy ABM Analyzer Workbooks to Discoverer Server

Copy the following files from the \$AU_TOP/discover/<language> directory to a valid directory on your NT server where you installed Discoverer Administration and User Editions (e.g., 'c:\stage):

```
abmimp.eex  
abmcowk.dis  
abmmatwk.dis  
abmdepwk.dis  
abmactwk.dis
```

Copy the following files from the \$ABM_TOP/bin directory to a valid directory on your NT server where you installed Discoverer Administration and User Editions (e.g., 'c:\stage):

```
abminst.sh  
abminswb.sh
```

After copying these files to the staging area on the NT machine, rename the files abminst.sh and abminswb.sh to abminst.bat and abminswb.bat respectively.

You will later install these workbooks to the server containing your ABM database (see: [Save ABM Analyzer Workbooks](#)).

Install ABM Analyzer Business Areas

To install the ABM business areas, run the 'abminst.bat' file from the staging directory on your Discoverer server. You will need the EUL owner database user ID, EUL password, and database name to complete this step.

Enter the following command at the MS-DOS prompt:

```
abminst <EUL owner> <password> <database name>
```

When the batch file executes, you should receive a message similar to the following:

```

Microsoft(R) Windows NT(TM)
(C) Copyright 1985-1998 Microsoft Corp.

M:\pkoganti>e:
E:\>abminst EUL_US EUL abm115db
      1 file(s) copied.

*****

Running this script will install the ABM
Analyzer business areas.  Previously installed
versions of the ABM Analyzer business areas (including
any business area customizations) will be backed up to
abmexp.eex.  Use the following command line to restore
abmexp.eex:

abminst -r <USER> <PASSWORD> <HOST>

*****

Creating EUL...
Exporting existing ABM business areas...
Finished exporting existing ABM business areas

Deleting existing ABM business areas...
Importing ABM business areas...

E:\>

```

Caution: After you run the `abminst` command you will lose all attribute folders you created previously in any business areas you also created. To restore your old business areas, enter the command below:

```
abminst -r <user> <password> <database name>
```

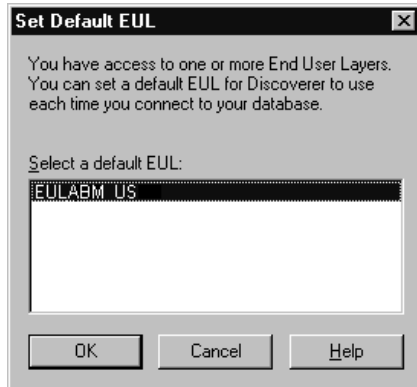
Close Discoverer Administrator Edition after the End User Layer is saved to the database. Check the log file, 'abminst.log', to ensure that the import ran successfully.

When you open Discoverer Administration or User Edition, set the default EUL before modifying your business areas, as described below.

►► To set the default EUL:

1. Log into Discoverer Administration Edition in application mode, using the username of the EUL owner you created earlier.

2. Choose File > Set Default EUL from the menu. You should see a window with a list of EULs:

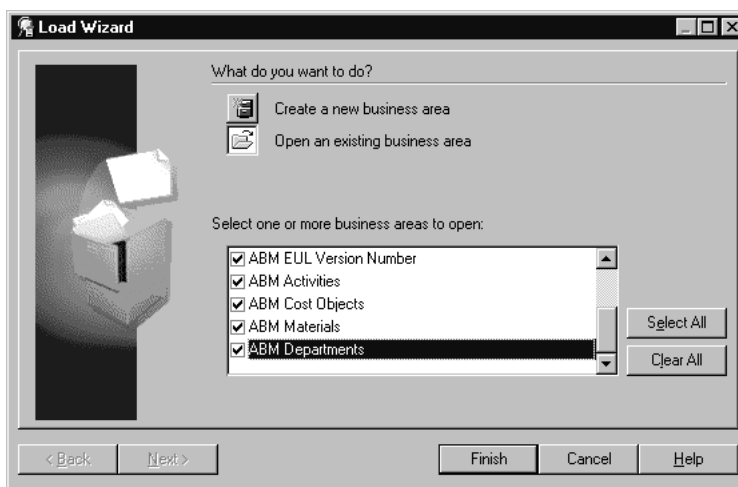


3. Select your EUL from the list of EULs owned by this EUL owner. Discoverer will use this EUL as the default each time you connect to that database. Choose OK.
4. Exit Discoverer Administrator Edition.

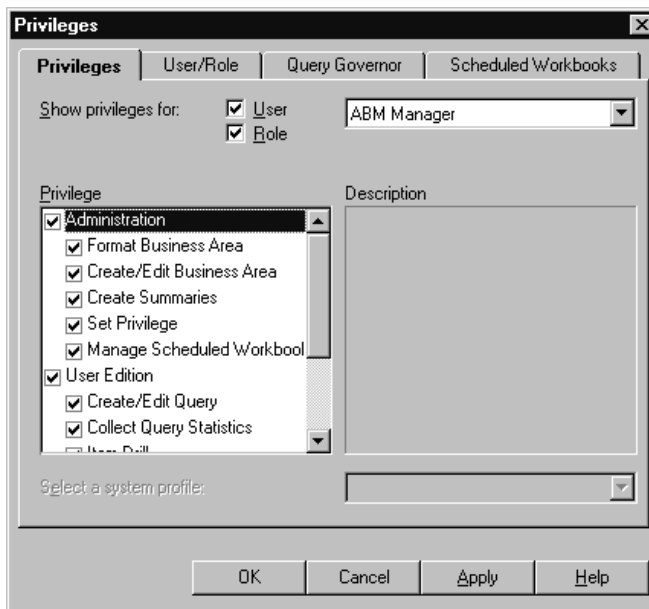
Grant Access to Discoverer Administrator and User Editions

►► To grant access to Oracle Discoverer Administration and User Editions:

1. Log into Discoverer Administration Edition as the EUL owner in Oracle Applications mode.
2. Choose Open Existing Business Areas.
3. Select all ABM Analyzer business areas and choose Finish.



4. Choose Tools > Privileges from the menu. The Privileges window will appear.



5. Select the ABM Manager responsibility from the poplist, then mark the appropriate check boxes in the Privilege area to grant the related access privileges within Discoverer Administration or Grant Editions.
6. Choose OK to save your work.

Note: If the responsibility to which you are granting access is not a Self-Service responsibility, it cannot be accessed later through the Self-Service Web Applications login.

Create Applications User

- You must create the Oracle Applications user through Oracle Applications. To do so, log into Oracle Applications as the system administrator responsibility and navigate to Security > User > Define. If your username is not assigned the system administrator responsibility, check with your organization's system administrator to get access.
- Assign ABM Manager Responsibility to the User.

The screenshot shows the Oracle Applications 'Users' form. The 'User Name' field is filled with 'VISION'. The 'Effective Dates' section shows 'From' as '05-APR-2000'. The 'Responsibilities' tab is active, showing a table with one row: 'ABM Manager' responsibility for the 'Activity Based Mana' application group, with an effective date of '04-APR-1999'.

Responsibility	Application	Security Group	From	To
ABM Manager	Activity Based Mana	Standard	04-APR-1999	

Set the Default EUL in the Discoverer User Edition for an Applications User

1. Log onto Discoverer user edition in Oracle Applications mode. Use the applications Userid created in the previous step, applications responsibility ABM Manager, applications password and database name.
2. Navigate to Tools>Options. Go to the EUL tab and select default EUL.

Save ABM Analyzer Workbooks

Now you can save the ABM Analyzer workbooks from the staging area to your ABM database. From the staging directory where you saved the workbooks on your Web Discoverer server, run the batch file 'abminswb.bat', including your Applications user ID, Applications responsibility, Applications password, and database name as parameters:

```
abminswb <Apps user ID> <Apps responsibility> <Apps pwd> <db name>
```

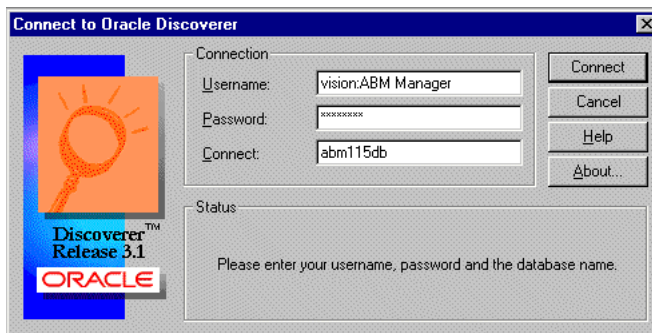
For example:

```
abminswb vision "ABM Manager" vision98 abm115db
```

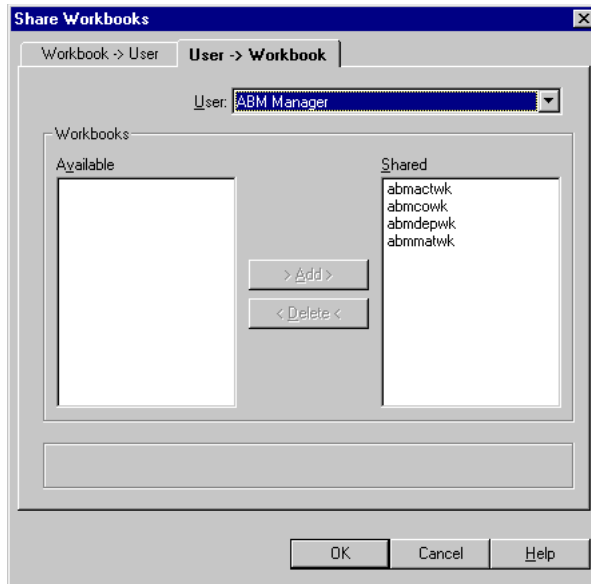
Grant Workbook Access to Oracle Applications Responsibilities

►► To grant workbook access:

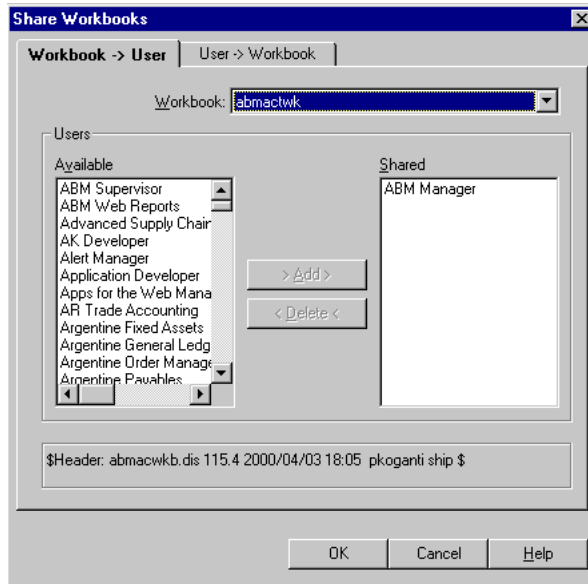
1. Log into Oracle Discoverer User Edition in Oracle Applications mode. Use the same Applications user ID, Applications responsibility, Applications password, and database name you used above when you saved your ABM Analyzer workbooks.



2. From the File menu, choose Manage Workbooks > Sharing.



3. Choose the User --> Workbook tabbed region.
4. From the User poplist, choose the responsibility to which you want to grant workbook access.
5. In the Workbooks region of the window, select the Available workbooks that you want to share, then choose the Add button to move them to the Shared area.
6. To see all the responsibilities that have been granted access to a workbook, choose the Workbook --> User tabbed region, then select the Workbook from the poplist. For example, in the figure below, you can see that ABM Manager is the only responsibility currently granted access to the workbook named "abmactwk".

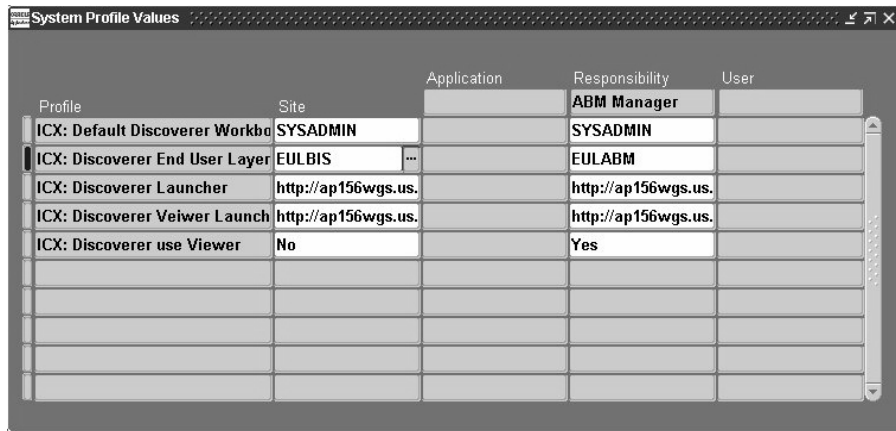


Define Applications Profile Options (required)

1. Log into Oracle Applications using the system administrator responsibility and navigate to Profile > System.
2. At the Site or Responsibility level, enter appropriate values for the following profile options:

ICX: Discoverer Default Workbook	Enter a default ABM Analyzer workbook
ICX: Discoverer End User Layer	Enter your EUL name
ICX: Discoverer Launcher	Enter the URL to Web Discoverer
ICX: Discoverer Viewer Launcher	Enter the URL of the Discoverer Viewer
ICX: Discoverer Use Viewer	Enter Yes or No

Update Discoverer EUL Item Labels (optional):



Profile	Site	Application	Responsibility	User
ICX: Default Discoverer Workbo	SYSADMIN		ABM Manager	
ICX: Discoverer End User Layer	EULBIS	...	EULABM	
ICX: Discoverer Launcher	http://ap156wgs.us.		http://ap156wgs.us.	
ICX: Discoverer Veiver Launch	http://ap156wgs.us.		http://ap156wgs.us.	
ICX: Discoverer use Viewer	No		Yes	

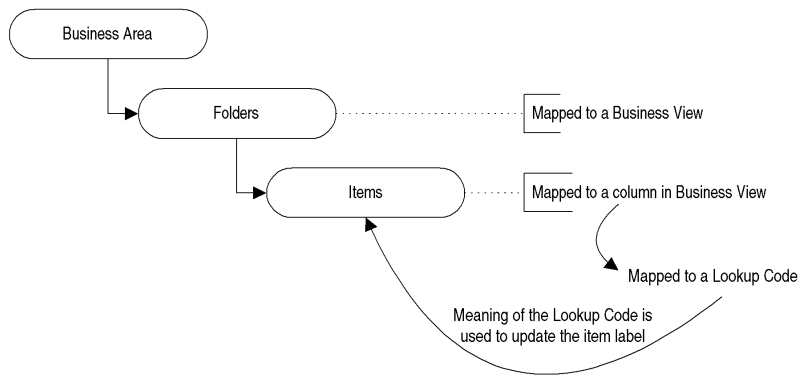
Following is an example of the Discoverer Launcher URL:



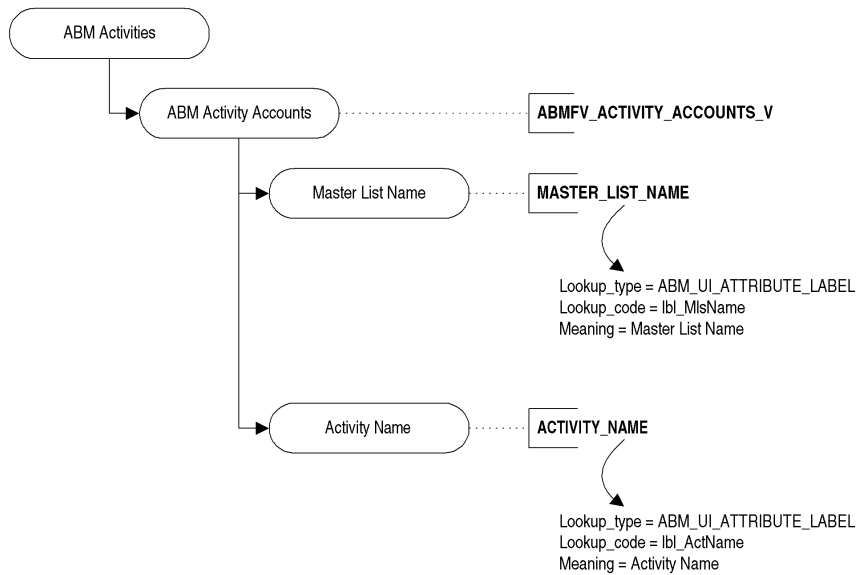
Update Discoverer EUL Item Labels (optional):

Note: This is only required if the user wants to use site modified labels in their Discoverer instance.

The following diagram illustrates how ABM components are mapped to database objects:



Example:



The mapping between Folders > Business Views, Items > Business View Columns is stored in Oracle Discoverer End User Layer (EUL) tables.

The mapping between Business View Columns and Lookups is stored in the ABM_BV_LABEL_MAPPING table.

The item names "Master List Name" and "Activity Name" are translated values derived from FEM_LOOKUPS.Meaning column. If you change the meaning of a lookup associated with an EUL Item, run the following script to propagate the change to the EUL item:

```
sqlplus <EUL userid>/<EUL passwd> @abmueull.sql <apps_username> <Business Area Name>
```

For example:

```
sqlplus eul_us/eul @abmueull.sql apps 'ABM Activities'
```

Upgrade Any Existing ABM Analyzer Workbooks (optional):

Note: Before you upgrade any existing ABM Analyzer workbooks, you must first install ABM Release 11*i* and ABM Analyzer Release 11*i*.

1. Log into Activa 3.0 Discoverer Administration edition in NON APPS mode.
2. Open all Activa Business areas. Supported Business Areas include:
 - Reporting Entities
 - Cost Objects
 - Materials
 - Activities
3. Select all the business areas and export them. To export, choose the menu option File --> Export. Enter the export filename when prompted, then choose Save.
4. Log into ABM 11*i* discoverer administration edition in APPS mode
5. Enter the EUL database userid and password to connect to the database.

Note: Use the EUL userid and password that you used to import ABM 11*i* Business areas (i.e., the userid and password that you passed to the script abminst.bat).

6. From the menu choose File > Import.
7. Enter the file name from step 3, then choose OK.
8. Choose Tools > Security from the menu and grant access to ABM Manager responsibility for all the imported Business Areas.
Remove ABMBV and ACTIVA from the "selected users/roles" section. Make sure "Allow Administration" check box is checked for ABM Manager.
9. Generate tagset views. Please refer to ABM analyzer user's guide for instructions on generating tagset views.
10. Log into Discoverer Administration edition as Applications user. For example:
userid = vision:ABM Manager
passwd = vision
DB Connect string = oracle

Select all the folders in each business areas (Press and hold the Control key to select multiple folders). Open the folder properties (right mouse button, then select Properties). In the Properties window change the owner to Oracle Applications APPS schema name.
11. From the menu select File > Refresh, which will open the Refresh wizard. Select the On-Line option and choose finish. This option will list all differences between the EUL object and it's corresponding database object.

If the list contains only the following invalid items, then choose OK to remove them:
 - sequence_number,
 - account_reference,
 - statistic_reference
12. From the menu Select View > Validate Folders. This will validate all the folders and display any errors next to the folder name. Errors include things like invalid table or column names.

Please contact Oracle Support if any seeded folders are invalid. Note that any errors caused by customizations must be resolved by you. Oracle does not provide support for any customizations.
13. Log into the Activa 3.0 database using Discoverer User Edition. Open all existing Activa 3.0 workbooks and save them to your local hard drive.

14. Log in to the ABM 11i database in Applications mode, using Discoverer User Edition. Open all of the Activa 3.0 workbooks that you saved to your local hard drive in step 13.

An alert will appear asking if you want to open the workbook in the current database account. Choose OK without changing the default selection.

Note: To log in, use an Applications userid:responsibility and password.

15. Save the workbook to database.
16. Grant workbook access to the ABM Manager responsibility. Optionally, you can grant access to other responsibilities.

To Grant access, choose Manage Workbooks >Sharing from the File menu, the select the Workbooks > Users tab. Select the workbook from the poplist. Grant access by moving the responsibility (ABM Manager) from the Available area to the Shared area. Follow the same steps to grant access to other responsibilities.

17. You have to add your workbooks to Self-Service Menu to access from Self Service. The workbooks can also be accessed from ABM Application by choosing the ABM Analyzer option.
18. Adding workbooks to the menu involves two steps:
 - Create a function to invoke Workbook
 - Add the function to the Menu

To create a function:

- a. Login to Oracle Applications and choose "Application developer" responsibility
- b. Navigate to Application --> Function
- c. Enter the values for Function and User Function Name
- d. For "Type" always enter WWW
- e. Select the Web HTML tab. In the HTML call field enter:

`OracleOasis.RunDiscoverer`

- f. Select the Form tab. In the parameters field enter:

`workbook=<your workbook name>`

Note: Look at workbook functions created for ABM 11i by querying functions starting with ABM. This info should help you in creating new workbooks functions.

For more information about creating functions, refer to *Oracle Applications Application Object Library User Guide, Release 11i*.

To add the function to the menu:

- a. In the Application developer responsibility navigate to Application > Menu.
- b. Query the menu that needs to be modified.
- c. Add the function you created in the previous step to the menu.

Reference Material:

The following publications provide additional information that you may find useful when upgrading your existing ABM Analyzer workbooks:

ABM Analyzer User's Guide, Release 11i

Oracle Discoverer 3.1 Administration Guide and Release Notes

Oracle Discoverer 3.1 User's Guide

Launching ABM Analyzer from Self-Service Web Applications

Once you've installed and configured all components, you are ready to launch ABM Analyzer through Self-Service Web Applications.

►►To launch ABM Analyzer through SSWA:

1. Check to confirm that your PC has Oracle JInitiator installed. Go to Start > Programs > JInitiator Control Panel. Make the following selections on the Basic tabbed region, then choose Apply:

Show Java Console: Deselect if selected

Enable JInitiator: Select

Network Access: Unrestricted

Java Runtime Parameters: -dx100m -dcache.size=20M

Note: Your version of JInitiator should be the same version you use in your Oracle Applications Release 11*i* environment.

2. Point your browser to the Self-Service URL (check with your system administrator to confirm this URL):
`http://ap906sun.us.oracle.com:1500/OA_HTML/US/ICINDEX.htm`
3. Enter your username and password to log in.
4. Choose the ABM Manager link.
5. Choose any workbook link under the Workbooks area of your screen.

Installing SEM Exchange

This chapter describes the installation process for SEM Exchange 11*i*.

Note: This installation procedure explains how to install SEM Exchange for an Oracle Applications Release 11*i* environment. This section also describes how to apply patches to a Release 11.0 or 10.7 NCA installation to enable the use of SEM Exchange in those environments with ABM Release 11*i*.

Prerequisites

- ❑ Install and configure Oracle Applications Release 11*i* with General Ledger fully implemented.
- ❑ Install and configure Oracle ABM (Activity-Based Management) Release 11*i*.

Apply the SEM Exchange Server Patch

This section provides the procedures required to install SEM Exchange with Oracle Applications Release 11*i*.

Note: The AD Administration (ADADMIN) and AutoPatch (ADPATCH) utilities are used throughout the installation procedures. For information about these utilities, see: *Maintaining Oracle Applications, Release 11i* .

This procedure creates the required SEM Exchange database objects, packages, seed data, and reports - within the Oracle Applications Release 11*i* environment.

1. Log on to your Release 11i environment using the Oracle Applications owner account.
2. Choose the patch directory.
3. Use ADPATCH to install the patch driver c1550940.driv. This driver needs to be applied on all servers in your Release 11i environment.
4. Install the SEM Exchange server patch d1550940.driv using ADPATCH. This patch creates the database objects, packages, and seed data. This driver must be applied to the administration server only.
5. Install the SEM Exchange server patch g1550940.driv using ADPATCH. This patch regenerates the reports and forms. This driver must be applied to all Forms servers, Web servers, administration servers, and concurrent processing servers.
6. Restart the concurrent manager. See: *Server Processes, Maintaining Oracle Applications, Release 11i*.
7. On the administration server, use ADADMIN to re-generate the message files by choosing the Maintain Application Files Menu option, and the Generate Message Files suboption.
8. Shut down and restart your Forms servers. See: *Installing Oracle Applications, Release 11i* for your platform.

Assign Responsibility

You must assign the Oracle Applications responsibility SEM Exchange Manager to the appropriate users before they can use SEM Exchange.

See Also:

Managing Oracle Applications Security
Oracle Applications System Administrator's Guide

Verify Installation

This section provides procedures to verify proper installation of the Oracle SEM Exchange forms and concurrent programs.

►► To verify Oracle SEM Exchange Forms:

1. Use a browser to start Oracle Applications, and connect using the SEM Exchange Manager Responsibility (you may have to set up a user account first).

2. Open each of the following forms:

- Setup Master Lists
- Segment Mappings
- Rule Sets
- Preview Collections

Each of the forms opens a separate window; close the window and return to the SEM Exchange Navigation Menu.

►► **To verify Oracle SEM Exchange concurrent programs:**

1. From the SEM Exchange Navigation Menu, choose Other > Report > Run, which opens the Submit Requests window.
2. Use the poplist in the Name field to display the five concurrent programs; close the window and exit Oracle Applications.

Using Earlier Versions of SEM Exchange and Oracle General Ledger with ABM Release 11i

Required Software Components:

- Sem Exchange 11.0/10.7 NCA
- ABM 11i
- Oracle Applications Release 11.0 with the 11.0.3 (or later) maintenance pack applied and GL fully installed
OR (for 10.7 customers)
Oracle Applications Release 10.7 NCA, with GL patchset A applied.

Installation Procedures:

- Install ABM 11i
- Apply SEM Exchange server patch I to your 11.0 or 10.7 NCA instance
- Create database link between SEM Exchange 11.0/10.7 database and ABM 11i database instances.
- Apply SEM Exchange server patch II to your 11.0 or 10.7 NCA instance

▶▶ To Install ABM Release 11i:

- ❑ See earlier chapters of this installation guide.

▶▶ To apply SEM Exchange server patch I:

- ❑ Use ADPATCH to install the patch driver c1248059.drv. Make sure you have the patch for your version of Oracle Applications.

▶▶ To create a database link between SEM Exchange 11.0/10.7 database and ABM Release 11i database instances:

1. Logon to Oracle Applications Release 11.0/10.7 database instance via SQL*Plus using Oracle Applications owner account(APPS)
2. Run the following script from the SQL> prompt:

```
@$EAA_TOP/patch/110/sql/eaalnks1.sql <db link name> <ABM 11i un_apps>  
<ABM 11i pw_apps> <ABM 11i ORACLE_SID>
```

For example:

```
SQL>@$EAA_TOP/patch/110/sql/eaalnks1.sql semx110_abm11i apps apps abm11idb
```

For 10.7:

```
@$EAA_TOP/patchsc/107/sql/eaalnks1.sql <db link name>  
<ABM 11i un_apps> <ABM 11i pw_apps> <ABM 11i ORACLE_SID>
```

For example:

```
SQL>@$EAA_TOP/patchsc/107/sql/eaalnks1.sql semx107_abm11i apps apps abm11idb
```

3. Check eaalnks1.log for any errors in your current directory.
4. Verify database link creation by reviewing the contents of the user_db_links table.

▶▶ To apply SEM Exchange server patch II:

1. Apply patch driver d1248059.drv using ADPATCH, this driver will upgrade seeddata and SEM Exchange Data Model.
2. Install SEM Exchange server patch g1248059.drv using ADPATCH. This will regenerate the forms/reports.

Migrating Data From Activa 3.x

If you are currently running a version of Activa 3.x, you will need to migrate your data from the existing database to the new ABM Release 11i format. The following section describes how to perform this migration.

Prerequisites

- ABM 11i must be installed as part of an Oracle Applications 11i instance.
- Migration from an Activa 3.x database to an 11i database must use a clean ABM 11i schema. If data exists other than the pre-installed seed data, it must be removed.

Note: All of the scripts mentioned below are located in \$ABM_TOP/patch/115/sql in your environment.

- To purge existing ABM user data from an Applications 11i Database:
 1. Disable foreign key constraints.
 - Log onto the database as abm, then run the ABMFKCON.sql script to remove the foreign key constraints.

Usage:

```
$ sqlplus abm/<abm_schema_password>@<ABM11i_db_SID>  
sql> @ABMFKCON.sql abm <abm_schema_password>  
sql> Exit
```

2. Purge existing data.

- Log onto SQL*Plus using the APPS user ID, then run abmprgdt.sql to delete any user data that has been created in the database.

Usage:

```
$ sqlplus apps/<apps_schema_password>@<ABM11i_db_SID>  
sql>@abmprgdt.sql  
sql>Exit
```

3. Reapply driver d1588595.drv to recreate ABM seed data.
 - Use the ADPATCH utility to apply the d1588595.drv to your ABM 11i database to recreate the seed data.
4. Recompile the APPS schema using the ADADMIN utility.
 - Data migration is only supported from an Activa 3.x database to 11i. If you are running an earlier version of Activa, you must first upgrade to Activa 3.x
 - Make sure that a TNSNAMES entry exists for the Activa 3.x database that you are migrating, in relation to your Applications 11i instance.

Migration Process

Step 1 — Create a DB Link from your Activa 3.02 database to the Applications 11i database and apply stored procedures to run the migration.

Run the script abmlnksy.sql against the APPS schema of your 11i database. This script will create a DB Link from the APPS Schema of the 11i database to the Activa database. It also creates any necessary synonyms for Activa Activa 3.x objects in the ABM 11i database.

Usage:

```
$ sqlplus apps/<apps_password>@<ABM11i_db_SID>  
  
SQL> @abmlnksy.sql <ActivaActiva 3.x_username> <ActivaActiva 3.x_password>  
<ActivaActiva 3.x SID>
```

Run the following two scripts, using SQL*Plus, to apply the stored procedures that perform the migration process:

```
SQL> @ABMUMAPB.pls  
SQL> @ABMUPGRB.pls
```

Step 2 — Disable Foreign Key Constraints in ABM Schema

1. Run the script `abmfkcon.sql` against the Apps schema of your 11i database. This will disable all foreign key constraints.

Usage:

```
$ sqlplus abm/<schema_password>@<ABM11i_db_SID>  
SQL> @ABMFKCON.sql abm <abm_schema_password>
```

2. Review the `abmfkcon.log` file for any errors.

Step 3 — Run the Data Migration Concurrent Program.

1. Log onto Oracle Applications and select the ABM Supervisor responsibility.
2. Navigate to Requests, then choose Run.
3. On the next window, choose Single Request.
4. From the list of concurrent programs, select ABM:Migrate Data from Activa Activa 3.x, then choose Ok.
5. On the parameters window, you will need to enter values for the following parameters:
 - **Model Name (Required):** This is a list of values that displays all models in the source Activa 3.x database. Select the model that you would like to migrate.
 - **Data Set Effective Date (Optional):** All data sets that are after this date will be selected for migration. If you select 01-JAN-1995, then all datasets after that date will be migrated. Any data sets prior to that date will not be migrated. If you don't select a date, all data sets will be migrated.
 - **Default Data Set Name (Required):** This is the data set that will contain consumption quantities after the migration is performed. (In Activa 3.x, consumption quantities were not stored in a data set.) You will be provided a list of values for all of the existing data sets in your Activa 3.02 database.
 - **Default Activity Hierarchy ID (Required):** Since multiple activity hierarchies are supported in 11i, you must specify a name for the existing hierarchy structure in your Activa 3.x database. For this entry, you just type in a value into the text box.

Step 4 — Enable the Foreign Key Constraints in the ABM Schema

1. Run the `abmfken.sql` script against the Apps schema of your 11i database. This will enable all foreign key constraints.

Usage:

```
$ sqlplus abm/<schema_password>@<ABM11i_db_SID>  
SQL> @ABMFKEN.sql abm <abm_schema_password>
```

2. Review the `abmfken.log` file for any errors.

If the concurrent program errors out, the exception will be logged in the `ABM_UPGRADE_LOGS` table. Query on the table where the `STATUS='EXCEPTION'`. Fix the issue and run the migration again. Only when the concurrent request completes successfully is migration for the particular model complete!

Notes

- Navigation Procedures from Activa 3.x are not migrated. You will need to enter any navigation procedures again in ABM 11i.
- Security is migrated, but ABM 11i provides much greater granularity. See: *ABM User Guide* for details.
- Mapping formulas from Activa 3.x are transformed into a mapping calculation with parameters and source and targets. Specific conversion rules are as follows:
 - The mapping calculation parameter requires a rate and distribution data set. These values are defaulted from the first rate and distribution data set found from an individual mapping rule.
 - Data set offsets found at the mapping rule level are not migrated. (In ABM 11i, offsets at the individual rule level are not supported.)
- In the case where cross model references exist for a bill or department hierarchy, it is required that all models using cross references be migrated. Only then should the foreign key constraints be applied. If foreign key constraints are applied after migration of a single model, it will result in a situation where referential integrity constraints are not being enforced. It is important that models be migrated sequentially, keeping in mind any dependencies.
- We recommended that you run calculations in Activa before you upgrade your data to ABM 11i.
- **Remember:** In Activa 3.02, the "Consumption Quantity PDS" parameter for the "Cost Object Unit Cost" calculation was optional. This parameter is now

required for ABM 11*i* and is NOT migrated. In ABM 11*i*, you MUST enter this parameter before running any Cost Object Unit Cost Calculations for the first time.

- SQL Scripts required for the migration procedure include:
 - abmprgdt.sql
 - abmlnksy.sql
 - ABMFKCON.sql
 - ABMFKEN.sql

Index

A

- ABM
 - installing, 2-1
- ABM Analyzer
 - installing, 4-1
- ABM Analyzer installation steps
 - copy DBC file, 4-3
 - copy workbooks, 4-7
 - create Applications user, 4-12
 - create Discoverer EUL, 4-4
 - grant access to Discoverer, 4-10
 - grant FND object privileges, 4-7
 - grant workbooks access to responsibilities, 4-13
 - install business areas, 4-8
 - save workbooks, 4-13
- ABM Analyzer workbooks
 - upgrading, 4-18
- ABMFKCON.sql, A-1, A-5
- abmfkcon.sql, A-3
- ABMFKEN.sql, A-5
- abmfken.sql, A-4
- abmgseul.sql, 4-7
- abminst.bat, 4-18
- abmlnksy.sql, A-2, A-5
- abmprgdt.sql, A-5
- abmsrvst.sh, 2-13
- abmueull.sql, 4-18
- ABMUMAPB.pls, A-2
- ABMUPGRB.pls, A-2
- Activa 3.x
 - migrating data, A-1

C

- cgicmd.dat file, 3-5

E

- eaalnks1.sql, 5-4

G

- GateKeeper properties file, 2-10

H

- hardware requirements
 - client tier, 1-4
 - database and applications tier, 1-4

I

- installing ABM, 2-1
 - apply ABM server patch, 2-1
 - define profile options, 2-19
 - grant user access, 2-20
 - install VisiBroker for Java on NT, 2-13
 - install VisiBroker for Java on UNIX, 2-2
 - prerequisites, 2-1
 - TERM variable, 2-3
- installing ABM Analyzer, 4-1
 - define profile options, 4-15
 - installation steps, 4-3
 - launching from Self-Service Web Applications, 4-21
 - prerequisites, 4-2

- technology components, 4-1
- update Discoverer EUL item labels, 4-16
- upgrade existing ABM Analyzer
 - workbooks, 4-18
- installing SEM Exchange, 5-1
 - apply SEMX server patch, 5-1
 - assign responsibility, 5-2
 - prerequisites, 5-1
 - using earlier versions of SEMX and GL, 5-3
 - verify installation, 5-2
- installing Web Reports, 3-1
 - client browser setup, 3-6
 - considerations for NT, 3-4
 - create cgicmd.dat file, 3-5
 - define profile options, 3-3
 - grant user access, 3-6
 - prerequisites, 3-2
 - set up environment, 3-3
 - technology components, 3-1

M

- migrating data from Activa 3.x, A-1
 - migration process, A-2
 - prerequisites, A-1

O

- Oracle Corporation, xii
- Oracle Installer
 - run in character mode, 2-3
 - run in Motif mode, 2-3
- overview, 1-1

P

- profile options
 - ABM: APPLLET PLUGIN TYPE, 2-20
 - ABM: APPLLET PLUGIN URL, 2-20
 - ABM: ORB Gatekeeper IOR, 2-20
 - ABM: VisiBroker Remote Host Address, 2-20
 - ABM: VisiBroker Remote Port, 2-20
 - ABM: Web Server Host, 2-20
 - ABM: Web Server Port, 2-20
- defining for ABM, 2-19

- ICX: Discoverer Default Workbook, 4-15
- ICX: Discoverer End User Layer, 4-15
- ICX: Discoverer Launcher, 4-15
- ICX: Discoverer Use Viewer, 4-15
- ICX: Discoverer Viewer Launcher, 4-15
- ICX: Report Cache, 3-4
- ICX: Report Format, 3-4
- ICX: Report Image, 3-4
- ICX: Report Launcher, 3-4
- ICX: Report Link, 3-4
- ICX: Report Server, 3-4
- Web Reports, 3-3

R

- report server environment variables
 - REPORTS60_CGIMAP, 3-5
 - REPORTS60_OWSMAP, 3-5
 - REPORTS60_PHYSICAL_MAP, 3-5
 - REPORTS60_SHARED_CACHE, 3-5
 - REPORTS60_VIRTUAL_MAP, 3-5

S

- scripts
 - ABMFKCON.sql, A-1, A-5
 - abmfkcon.sql, A-3
 - ABMFKEN.sql, A-5
 - abmfken.sql, A-4
 - abmgseul.sql, 4-7
 - abminst.bat, 4-18
 - abmlnksy.sql, A-2, A-5
 - abmprgdt.sql, A-5
 - abmsrvst.sh, 2-13
 - abmueull.sql, 4-18
 - ABMUMAPB.pls, A-2
 - ABMUPGRB.pls, A-2
 - eaalnks1.sql, 5-4
- SEM Exchange
 - installing, 5-1
- system architecture, 1-2
- system requirements, 1-3
 - hardware, 1-4
 - software, 1-3
 - web browser, 1-3

V

- VisiBroker for Java on NT, 2-13
 - create GateKeeper Properties file, 2-16
 - set up DOS environment, 2-15
- VisiBroker for Java on UNIX
 - create GateKeeper properties file, 2-10
 - installing, 2-5
 - setting up UNIX environment, 2-9

W

- Web Reports
 - installing, 3-1

