

Oracle® Balanced Scorecard

Install Guide

Release 11i for Windows

Part No. A95234-08

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ORACLE®

Oracle Balanced Scorecard Install Guide, Release 11i for Windows

Part No. A95234-08

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If you have problems with the software, please contact your local Oracle Support Services.

Preface

Welcome to the Oracle Balanced Scorecard Install Guide, Release 11*i*.

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

- The principles and customary practices of your business area.
- Oracle Balanced Scorecard.

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

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

The Oracle Balanced Scorecard Install Guide contains the information you need to understand and use Oracle Balanced Scorecard. This guide contains the following chapters:

- Chapter 1, "Introduction"
- Chapter 2, "Installing Balanced Scorecard"

Documentation Accessibility

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Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of Oracle Balanced Scorecard.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

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

- **PDF Documentation**- See the Online Documentation CD for current PDF documentation for your product with each release. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle Applications Help for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **Release Content Document** - See the Release Content Document for descriptions of new features available by release. The Release Content Document is available on Oracle*MetaLink*.
- **About document** - Refer to the About document for information about your release, including feature updates, installation information, and new documentation or documentation patches that you can download. The About document is available on Oracle*MetaLink*.

Related Guides

Oracle Balanced Scorecard shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Balanced Scorecard.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on Oracle *MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Balanced Scorecard implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical 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, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle *Metalink*.

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Balanced Scorecard and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many education centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Balanced Scorecard 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, managing an Oracle server, and your hardware and software 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 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 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.

About Oracle

Oracle 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 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing 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 145 countries around the world.

Your Feedback

Thank you for using Oracle Balanced Scorecard and this user guide.

Oracle values your comments and feedback. In this guide is a reader's comment form that you can use to explain what you like or dislike about Oracle Balanced Scorecard or this user guide. Mail your comments to the following address or call us directly at (650) 506-7000.

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Or, send electronic mail to appsdoc_us@oracle.com.

Introduction

This chapter provides an overview of the architecture of the Oracle Balanced Scorecard (BSC). This includes an overview of the basic usage, architecture options and system requirements for BSC.

This chapter contains the following sections:

- Overview on page 1-1
- System Architecture on page 1-1
- System Requirements on page 1-4

Overview

Oracle Balanced Scorecard (BSC) is part of the Oracle Business Intelligence set of applications. This application turns performance management systems into active management tools by enabling their deployment across an organization, using powerful, web-enabled graphical interfaces. The 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, the Oracle Balanced Scorecard 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.

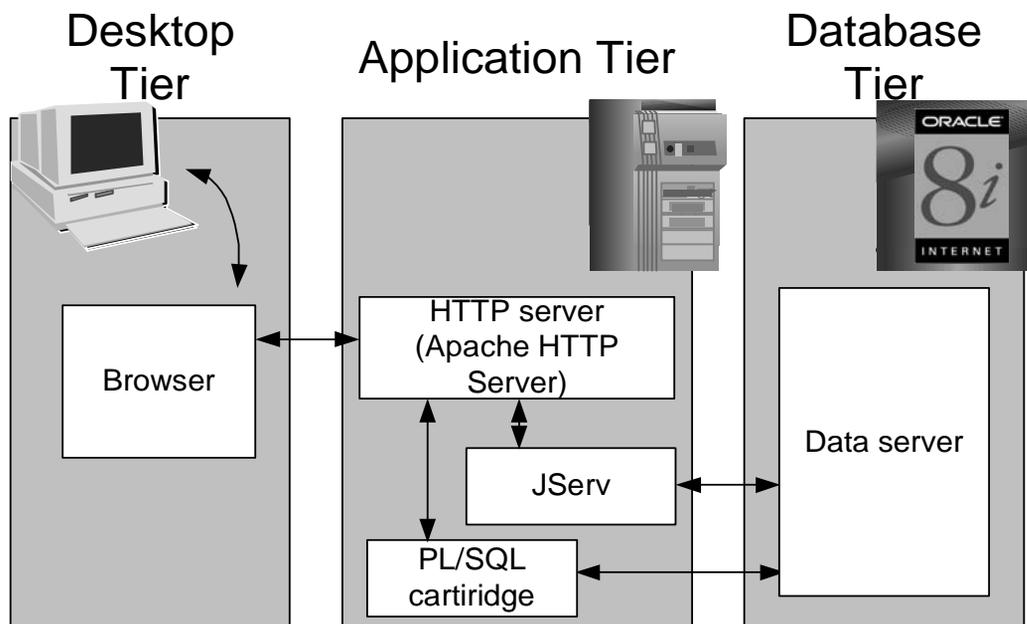
System Architecture

This section describes the system architecture of the BSC Viewer and the BSC Architecture modules.

Three Tier Architecture for BSC Viewer

Oracle Balanced Scorecard uses 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.

Figure 0-1 Three Tier Architecture for BSC Viewer



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.

Architecture for BSC Architecture Modules

BSC Architecture modules are installed in client-server mode connected to an enterprise database.

The BSC Architecture modules include:

- **BSC Setup:** This is the tool used to set up the BSC system after installation. It is used to register BSC systems, administer database privileges, import data, upgrade systems from previous Releases, and migrate data between systems.
- **BSC Architect:** This tool is used to set up balanced scorecards; create and configure indicators, groups and datasets; and set calculation and other options inside BSC tables where data is stored. There are three sub-modules:

Builder: Used to create indicators and groups, and to assign KPIs to different balanced scorecards.

KPI Designer: Used to arrange how KPIs are viewed and categorized; configure the functionality of scorecard formulas and datasets; and generally tailor the design of the balanced scorecard for the user.

Metadata Optimizer: Used to evaluate all the datasets and dimensions specified for a balanced scorecard KPI, and then create an input table structure for populating data to the balanced scorecard. This is run after changes are made in KPI Designer that affect the configuration of different indicators and groups.

- **BSC Manager:** This tool is used to load and configure the data in the BSC tables. There are two sub-modules:

Loader: Used to physically load data into the tables used by the Viewer from the input tables.

Administrator: Used to assign and restrict access to balanced scorecards (tabs) and KPIs according to responsibility title.

- **BI Builder:** The Oracle Business Intelligence Builder (Oracle BI Builder) is a powerful HTML design tool allowing the configuration of performance management systems with the flexibility of the BSC design model. The Oracle BI Builder is the first phase of a complete HTML design tool. In this release, and for preseeded measures, the tool already includes most of the functionality BSC designers have in the BSC Builder tool (one of the module of the BSC Architect). Future releases will progressively increase the functionality of this tool until it completely replaces the BSC Architect.

System Requirements

This section outlines the system requirements for Oracle Balanced Scorecard, including requirements for the web browser, software, and BSC Architect platform.

BSC Architect Platform Requirements

- Pentium CPU, or equivalent, with a minimum processor speed of 266 MHz.
- Windows NT Version 4.0 and Service Pack 3.
- Minimum Disk Space of 65 MB.
- Minimum recommended memory of 64 MB.
- BSC Architect requires 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.

Installing Balanced Scorecard

BSC Architect Modules Installation

This section covers the steps for installing the BSC Architect modules and some minimum deployment steps. The Balanced Scorecard Architect modules are: BSC setup, BSC Architect, and BSC Manager.

Prerequisites

Step 1 Deinstall previous releases of BSC Architect Modules

If you have previously installed Balanced Scorecard, deinstall those versions. Use the Oracle Installer that you originally used to install the previous releases of BSC Architect (for example, the version in the directory c:\Oracle for Windows NT\Oracle Installer).

Before you deinstall previous versions of Balanced Scorecard, we recommend that you back up your Balanced Scorecard system(s). Use Export with the Setup Wizard, then save the resulting .dmp file in a directory that is different than your Oracle Home.

Step 2 Shut down Oracle applications, services, and browser

Shut down any Oracle applications and services. Go to Start > Settings > Control Panel > Services. In the Services window, choose each Oracle service individually, choose HW Profiles, and disable the service. To ensure no services are running, open the Windows NT Task Manager (CTRL-ALT-DEL). On the Processes tab, select any Oracle services, then choose End Process. Close any open applications, including your Web browser.

Step 3 Confirm administrative rights and disk space

You will need Windows NT administrative rights to register your Balanced Scorecard system. To confirm if you have administrative rights, choose Start Menu > Programs > Administrative Tools > User Manager. Under the User menu, if the option New User is not

available, you do not have administrative rights. You must ask your system administrator to grant administrative rights to your NT user ID or create a new user ID that does have administrative rights.

To install BSC Architect and Oracle 8.0.6 Utilities you need 65 MB of space. If your drive is partitioned, you need 30 MB on drive c:/, since the installation procedure may use Temporary folders in C while BSC Architect is being installed. To check your available disk space, choose Start > Programs > Windows NT Explorer. Choose the node for the drive where you plan to install BSC Architect, then choose File > Properties.

Installing BSC Architect Modules

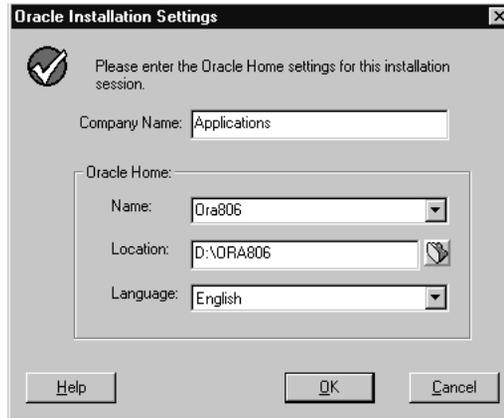
Installing the BSC Architect module involves these steps:

1. Install Oracle 8.0.6 Utilities on page 2-2
2. Install Oracle 9i Release 2 (Windows XP Users Only) on page 2-6
3. Install BSC Architect Modules on page 2-6

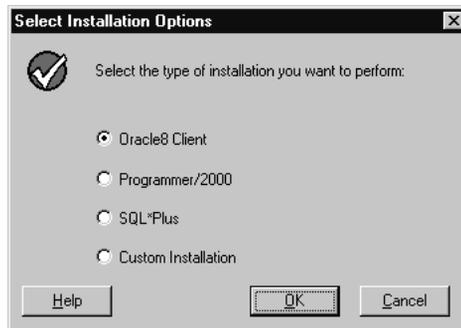
Install Oracle 8.0.6 Utilities

BSC Architect requires the Oracle 8.0.6 Utilities. You will install these utilities as shown in the installation steps.

1. Download the Oracle Balanced Scorecard 8.0.6 client for the Architect patch 1992496 from 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, we recommend that you create a different home for the Oracle 8.0.6 utilities. Remember also that this home must be the same home directory in which you will install BSC Architect.

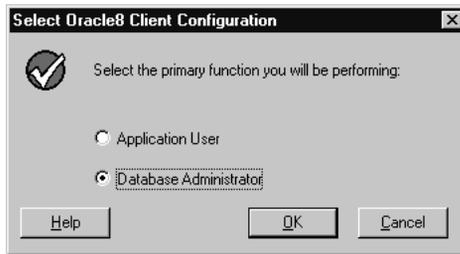
Figure 2–1 Oracle 8.0.6 Setup, Installation Settings Window

4. Select the Oracle8 client installation.

Figure 2–2 Oracle 8.0.6 Setup, Installation Options Window

5. Select the user.
 - » If you are using Windows XP, select Application User.
 - » If you are using Windows NT or other version, select Administrator.

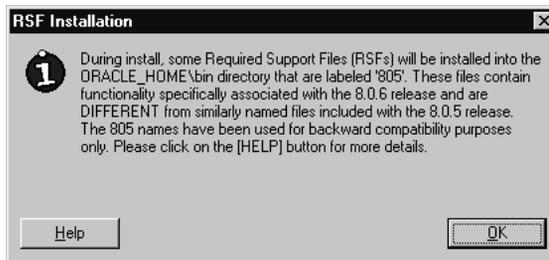
Figure 2–3 Oracle 8.0.6 Setup, Client Configuration Window



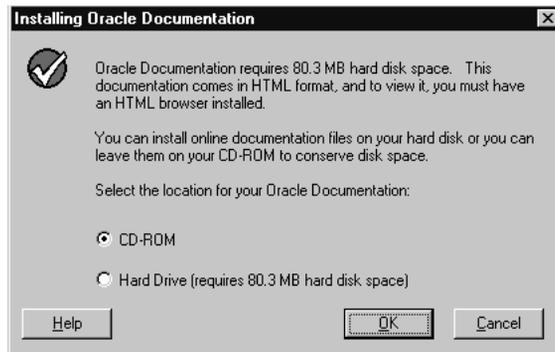
6. You will receive a notice that required support files will be installed to the ORACLE_HOME\bin directory.

Note: Ensure that your 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 your primary home.

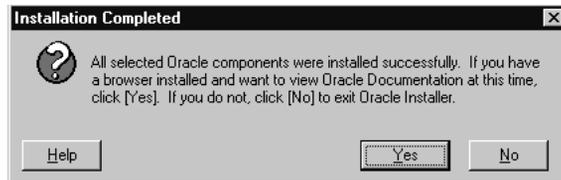
Figure 2–4 Oracle 8.0.6 Setup, RSF Confirmation Window



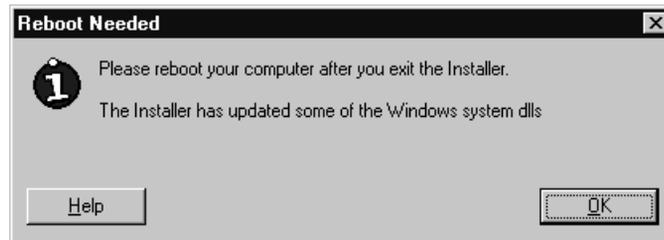
7. Choose where you want to access the Oracle documentation: from a CD-ROM or from your local drive. If you install files locally, they require 80.3 MB of disk space.

Figure 2–5 Oracle 8.0.6 Setup, Documentation Installation Options

8. You should receive a confirmation if installation was successful.

Figure 2–6 Oracle 8.0.6 Setup, Installation Confirmation Window

9. Reboot your machine for all changes to take effect.

Figure 2–7 Oracle 8.0.6 Setup, Reboot Window

Install Oracle 9i Release 2 (Windows XP Users 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 on page 2-2.
2. If you have a previous version of Oracle Client or a personal version (other than Oracle 8.0.6) , then un-install Oracle Objects from OLE from existing Oracle Homes.

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 Readme and Installation Guide for installation instructions.

Install 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 the BSC Architect under the 9i client Oracle Home.
5. Once these steps are complete, go to Post-Installation Tasks on page 2-13.

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.
- Set up the database using BSC Setup as described in Administration Guide BSC Setup Chapter.

Install BSC Architect Modules

Use the Oracle Universal Installer to install the modules for BSC Architect, which contains the BSC design and administration tools.

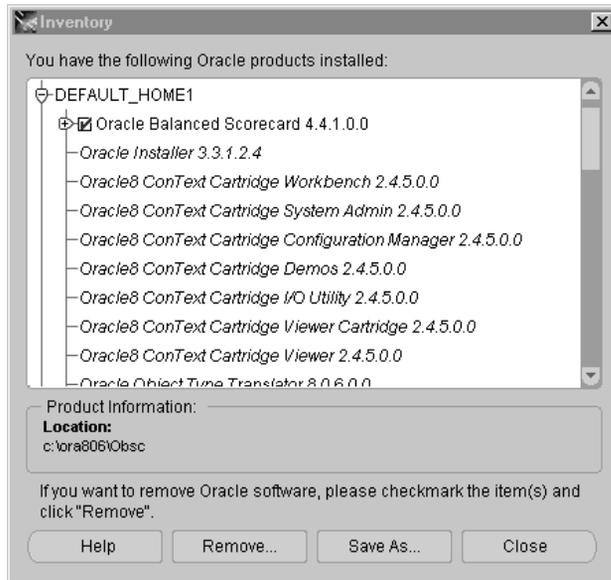
1. Download the Balanced Scorecard Architect patch 3243701 from MetaLink and copy to a temporary directory on your desktop.
2. Unzip the patch.
3. Launch the BSC Architect installation program, setup.exe, from the client\win32\OBSC_Architect\install\win32 directory on the patch in the previous step.

Figure 2–8 Oracle Universal Installer, Welcome Window



4. 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, select the BSC check box and choose to remove the BSC components.

Figure 2–9 Inventory Window



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.

Figure 2–10 Oracle Universal Installer, File Locations Window

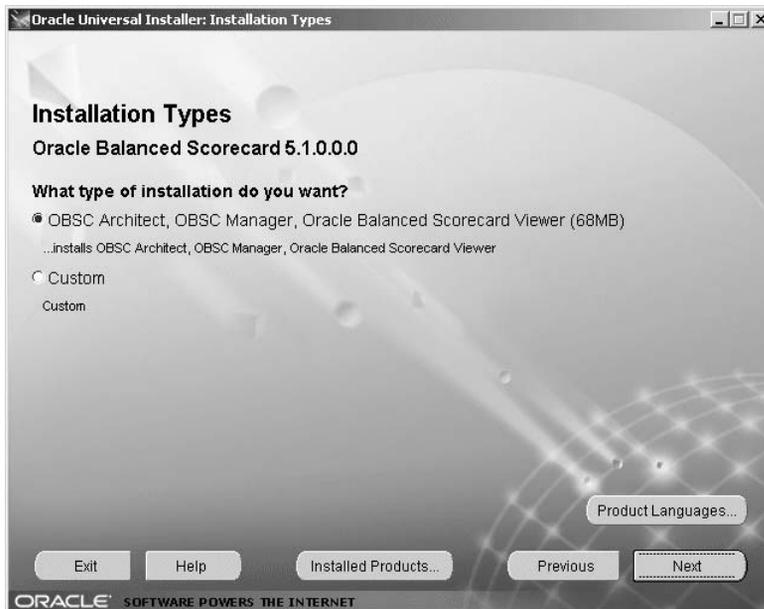
5. The File Locations window displays the products.jar directory path. If you do not see products.jar, choose the Browse button to locate the file on the Balanced Scorecard CD. Otherwise, do not change the default path.

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.

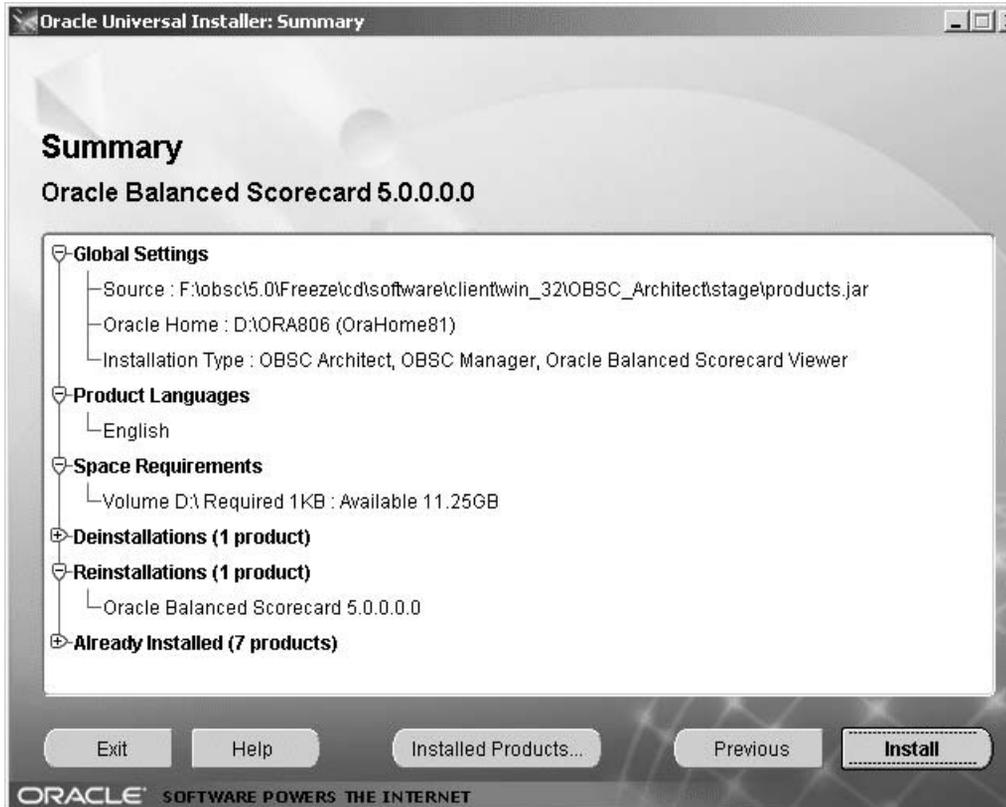
6. Choose Next.

Figure 2–11 Oracle Universal Installer, Installation Types Window



7. 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.
8. 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.

Figure 2–12 Oracle Universal Installer Summary Window



9. The install process begins. The process creates the `installations.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.

Figure 2–13 Oracle Universal Installer, Install Process Window



10. If the process was successful, you should receive a confirmation message shown in Figure 2–14.

Figure 2–14 *End of Installation Window*



11. After you finish installing BSC Architect, you must reboot your computer.

Post-Installation Tasks

Once you have completed installing the design and administration tools, you must complete these post-installation tasks:

- » Define the Service Name
- » Define the Data Source Name
- » 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.

Step 1 Define the Service Name in 8.0.6

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.

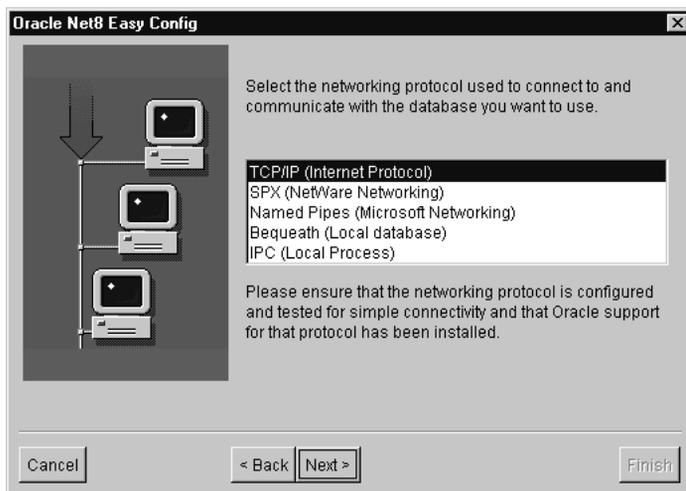
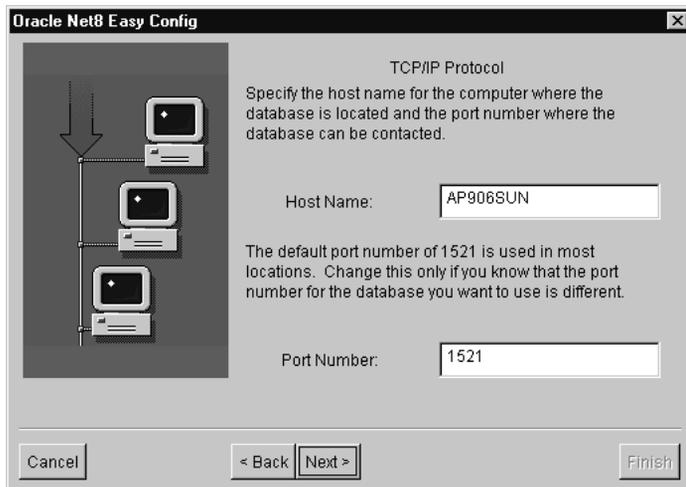
Note: Windows XP users with Oracle 9i installed, need to define the service name in Oracle 9i. Refer to "Define Service Name in 9i". and be sure to install it under the Oracle 9i client home.

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

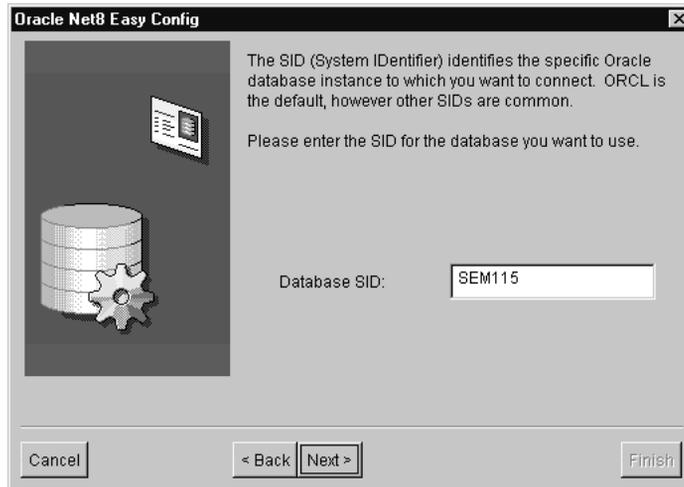
Figure 2–15 Net8 Easy Config Welcome Window



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.

Figure 2–16 Net8 Easy Config Network Protocol Selection**Figure 2–17 Net8 Easy Config Network Protocol Selection**

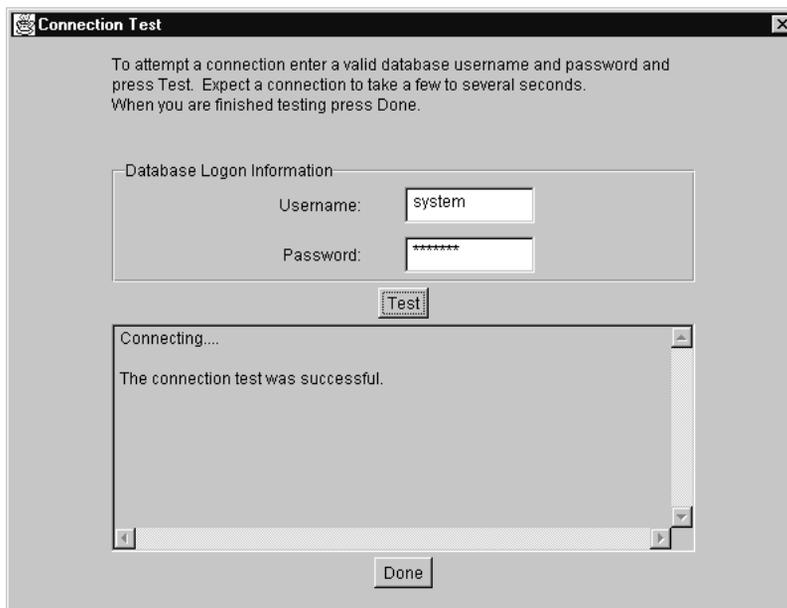
4. You are prompted for a Database SID, which is the Oracle database instance to which you want to connect. This value is the same as your global database name. When you have entered a name, choose Next to continue.

Figure 2–18 Net8 Easy Config SID Selection

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.

Figure 2–19 Net8 Easy Config Connection Test

6. Restart your computer to make these changes effective.

Congratulations, you have defined a Service Name! Make sure you remember the name of your Service Name. If you forget the Service name, you can go back into Net8 Easy Config and choose the Modify radio button. Then scroll down until you find your Service Name. You may also click the Next button to see additional details about each Service Name.

Step 2 Define Service Name in 9i

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 latest version.
4. Enter the Service Name.
5. Select the type of protocol. Example: TCPIP.
6. Enter the Host Name and Port.

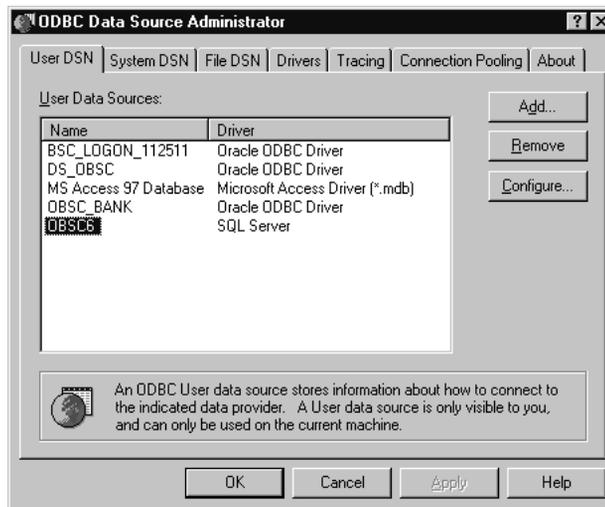
7. Enter the Service Name.

Step 3 Define the Data Source Name

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. Configure your Data source name (DSN) using the appropriate service name. From Windows NT, go to Start > Settings > Control Panel > ODBC. The following screen appears:

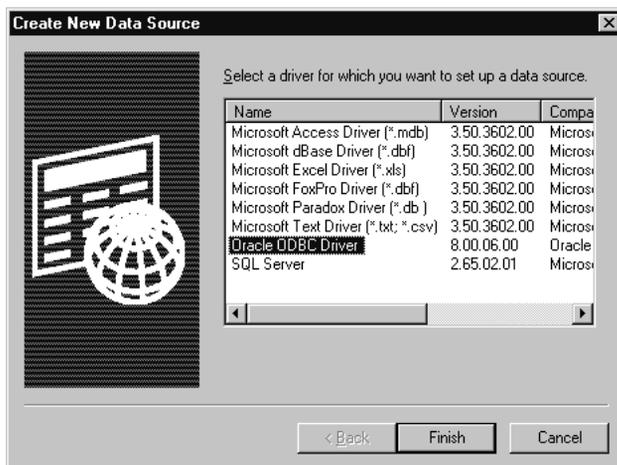
Figure 2–20 ODBC Data Source Administrator Window



2. Choose the Add button to create a new Oracle ODBC driver. On the Create New Data Source window, select the entry for Oracle ODBC Driver, version 8.00.06.00, then choose Finish.

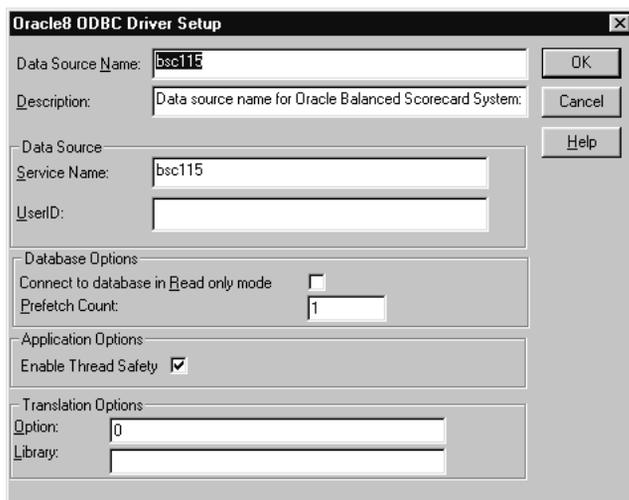
Note: If you are Windows XP user and have installed Oracle 9i, you must choose the Oracle ODBC Driver 9i version.

Figure 2–21 Create New Data Source Window



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.

Figure 2–22 Oracle8 ODBC Driver Setup Window



Step 4 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 Administration Guide*, Release 4.8.

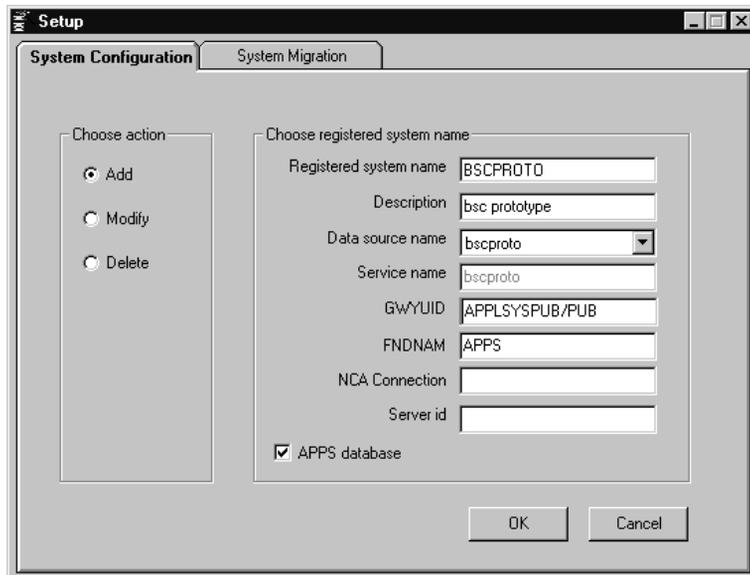
1. Log into Balanced Scorecard Setup, use:

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.

Figure 2–23 BSC Setup, System Configuration Window



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

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. 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:

```
UTL_FILE_DIR=<directory>
```

For example:

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

Step 5 Log into BSC Architect

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

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.

- n 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.
- n 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.
- n 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.

- n 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.
- n If you get the message, 'Setup wizard couldn't find the bin utilities' check to see that the file `obsinit.dat` in your <Oracle home>\OBSC directory points at your <Oracle home>\bin directory. For example:
- n `ORACLE_UTILITIES_DIR = d:\ora806\bin` if ora806 is your primary home.
- n If you get one of the following error messages:

- n ORA-12545 Connect failed because target or host is not found
- n ORA-12203 TNS unable to connect to destination or TNS No Listener

check the following:

- n Make sure the DB Listener is running. Contact your database administrator for more information.
- n Verify that the Port ID and Database SID are correct for the service name you created using Net Easy Config.

Multilanguage 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.

Glossary

Data Source Name

The Data Source Name will be used by the BSC Setup Wizard to create new systems or modify systems in the database. (Since the Data Source Name is always linked to a Service Name, the application always knows what database to use by referring to the Data Source Name).

Service Name

The Service Name is a user-defined logical name that contains information about the exact name and server location of the Oracle database. This name is defined on the user's PC, and will be used by the Oracle Balanced Scorecard to find the database and connect to it.

Registered System Name

The name by which a particular balanced scorecard system (that exists on a database somewhere) is registered on your computer.

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