

Oracle® Activity-Based Management

Installation Guide

Release 11*i*

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Oracle Activity-Based Management Installation Guide, Release 11i

Part No. A90867-03

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Primary Author: Vivek Ghosh, Srinivasan Jandyala, Sudharsan Krishnamurthy

Contributing Authors: Vinod Bansal, Frank Colligan, Dan Sinnreich

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

Part No. A90867-03

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Preface

Welcome to Release 11*i* of Oracle Activity-Based Management (ABM). The purpose of this guide is to help you to install the application, 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 for installing Oracle ABM products. It is intended for system administrators, internal and external consultants, and any other users who may be responsible for installing, upgrading, and configuring ABM products and components.

Documentation Accessibility

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Structure

This installation guide 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.

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 Activa 3.x to ABM 11i.

Modifying Data in Oracle Applications

Tables within Oracle Applications are interrelated. When you use Oracle Applications to change one table, many tables can be updated and validated simultaneously. The system also keeps track of who changes information. These measures help maintain the integrity of your data.

If you modify table data using a database tool, or any other method than Oracle Applications, then you risk changing one table without updating related tables. This could lead to inaccurate and unreliable data.

Caution: Oracle strongly advises against using database tools, or any mechanism other than Oracle Applications, to change table data.

Related Documents

For additional information, refer to these related documents:

- *Oracle Activity-Based Management User Guide*
- *Oracle ABM 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 select one or none.

Training and Support

Oracle provides training and support to help your organization get the most out of Oracle products.

Training

Oracle offers training courses to help you and your staff master each application. You can attend courses at any Oracle Education Center, or you can arrange for classes to be conducted at your facility by an Oracle instructor. In addition, Oracle 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 SEM Exchange 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.

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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.

Introduction

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

Overview

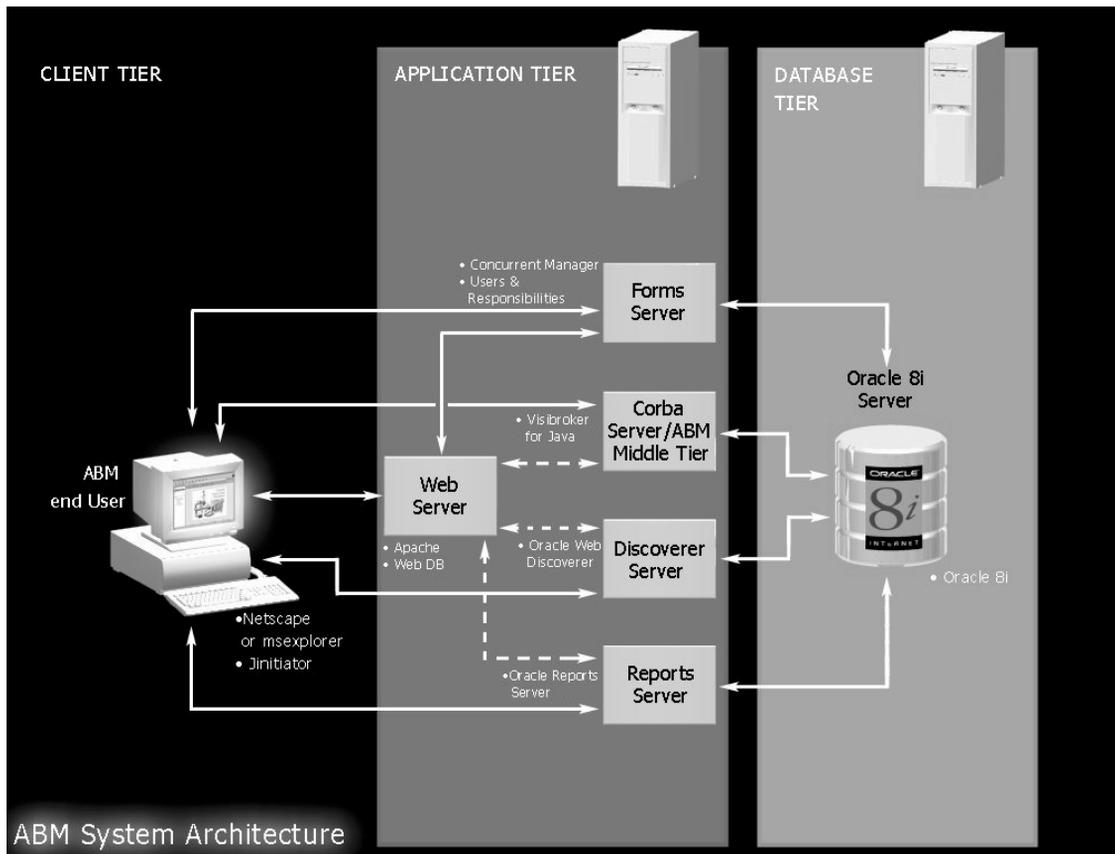
ABM products include:

- **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 combine high performance with an easy-to-use interface to select information, reducing the cost of installing a customized solution to enable users access to the information required for 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 link between traditional accounting for financial reporting and activity-based management, enabling

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 11*i* application environment. Recommended web browsers are Netscape Communicator 4.5 or higher and Microsoft Internet Explorer 5.0 or higher.

Software Requirements

ABM Release 11*i*

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

ABM Web Reports Release 11*i*

- Oracle ABM Release 11*i*, installed and configured

ABM Analyzer Release 11*i*

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

SEM Exchange Release 11*i*

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

Note: 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 explains how to install ABM and prepare it for use.

Prerequisites

Be sure to do the following before installing ABM:

- 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*.
- Verify the license status of ABM, FEM and EAA using License Manager. If any of these products are not licensed, license the products before continuing.

The Rapid Install Process

With release 11.5.5, ABM is now included in the base Oracle Applications Rapid Install process. This means that the latest ABM patch is applied as part of the standard installation process.

The instructions for installing the VisiBroker middle tier and all other components must still be followed for a complete installation.

Any patches released subsequent to the initial installation must be applied using the Autopatch utility. These instructions are included in the next section.

For more information about the Rapid Install process, see the "Installing Oracle Applications" document on the documentation library cd.

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: Be sure to do the following:

- Check your log after installing each patch driver. The log is located in the \$APPL_TOP/admin/<dbname>/log directory.
 - Back up 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.
-
-

Applying the ABM Product Patch

1. Before applying the patch, check the license status of ABM, FEM, and EAA using License Manager. If not licensed, license it using License Manager.
2. Log in to your Oracle Applications Release 11i environment using the Applications owner account.
3. Select a patch directory.
4. Download the latest patch from Metalink. Make sure to select the correct patch file for your platform.
5. Unzip the patch file for your platform.
6. Use ADPATCH to apply the patch drivers in the following order:
 - c*.drv (should be applied to all servers in your Release 11i environment).
 - d*.drv (should be applied to the Administration server only).
 - g*.drv (should be applied to all servers in your Release 11i environment).The asterisk (*) represents the latest patch number.
7. (On the Administration server only) Run ADADMIN, from the Maintain Applications Database Objects menu, select the Compile APPS schema(s) option.

Installing 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, available from Metalink as a patch. Download the patch to a working directory and then unzip the file.

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.

Running Oracle Installer in Character Mode

1. Change directories to your working directory
2. Run the Oracle installer by entering the command:

```
$ orainst /c  
or  
$ orainst
```

(where \$ is the UNIX command prompt)

The Character mode version of the Installation Options: Home Locator window displays. Use the Tab Key to move your cursor.

Figure 2–1 Installation Option: Home Locator Window



Running Oracle Installer in Motif Mode

To run the Installer in Motif mode, the Motif libraries must be available on your UNIX machine. If the Motif libraries are available, 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.

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

```
$ TERM=<supported terminal>
$ export TERM
(where $ is the UNIX command prompt)
```

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
```

2. 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 Windows*



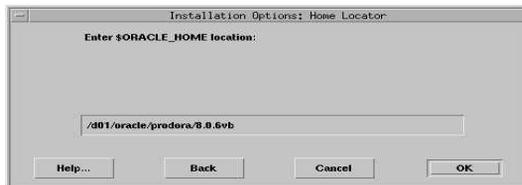
Note: The remainder of the steps in this section show the Motif versions of the related installation windows. However, these steps are the same for the Character mode installation process.

Installing VisiBroker for Java

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

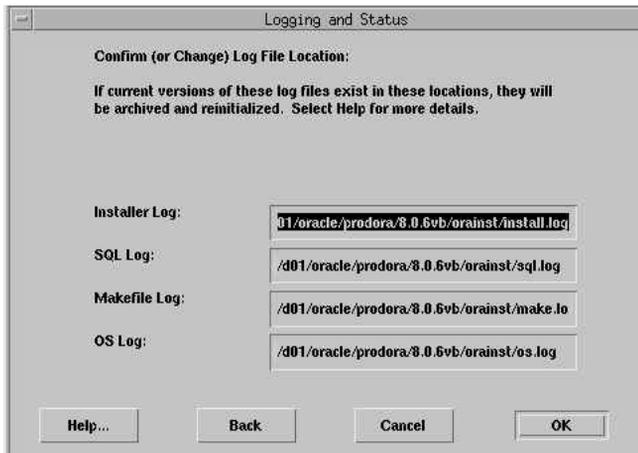
Note: This is the directory under which VisiBroker will be installed. It can be any location, and does not have to be in a valid ORACLE-HOME or APPL-TOP.

Figure 2–3 Enter Oracle_Home Locations



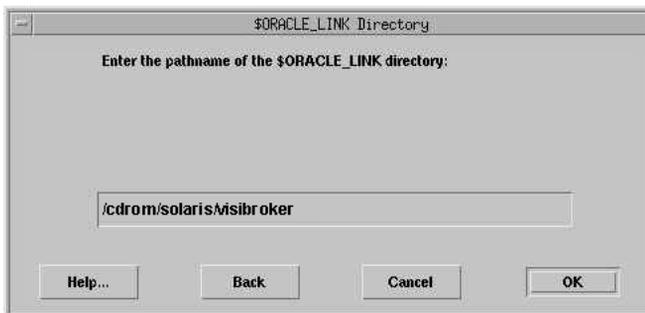
2. In the Logging and Status window, enter the path where the Installer, SQL, Makefile, and operating system logs will be written. Select OK to continue.

Figure 2–4 Logging and Status Windows



3. 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 does not appear in your installation.

Figure 2–5 \$ORACLE_LINK Directory Window



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

5. The NLS window appears. Select American English and then select OK.

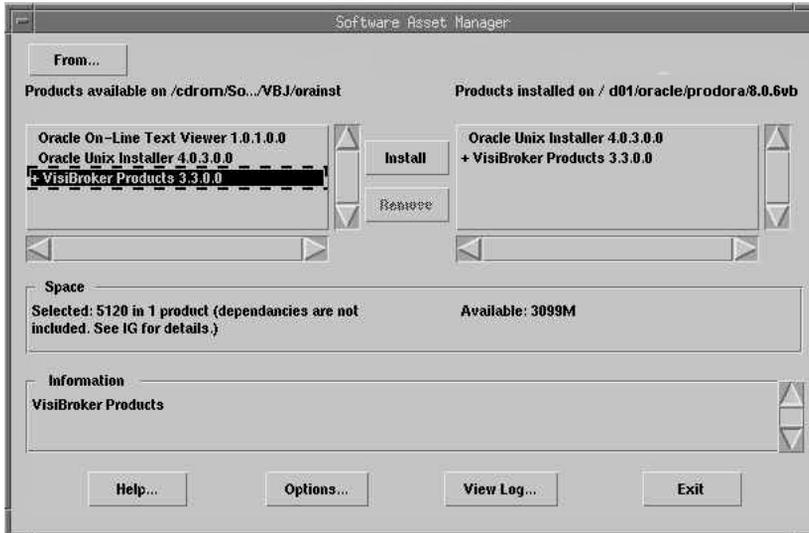
Figure 2–6 NLS Windows



6. The Software Asset Manager window appears. Select VisiBroker Products 3.3 and then select the Install button.

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

Figure 2–7 Software Asset Manager Window



7. Once the installation process has completed, select 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.

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

These processes are needed to enable 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

In a Bourne shell, set the following environment variable values for VisiBroker. It is recommended that you set the variables before starting the OSAGENT and GATEKEEPER processes in a new UNIX session.

```
$ 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
```

The file \$ABM TOP/bin/vbvars.sh in the defined \$APPL_TOP defines sample values for the Visibroker variables specified above. Copy the file to <VISIBROKER_INSTALL_DIR>/bin, and then edit the file to modify the values to suit your environment. Executing the file on the shell prompt will set up the Visibroker variables for your environment.

Also note the following:

- <JRE_PATH> could correspond to \$SOA_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.

- Verify that the PATH value does not contain any components which 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.

Creating the GateKeeper Properties File

The GateKeeper properties file contains GateKeeper configurations and is created in the directory <VISIBROKER_INSTALL_DIR>/bin. This step is needed only once after Visibroker installation.

If the gkconfig utility is available in your <VISIBROKER_INSTALL_DIR>/bin directory, 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. Refer to the instructions on page 2-4.

To create or edit the GateKeeper Properties File using a text editor, do the following:

1. Run gkconfig from <VISIBROKER_INSTALL_DIRECTORY>/bin.
2. On the General tab, verify that the Enable Callback checkbox is checked and that the Log Level is set to Quiet. Be sure to enter the correct IOR file location.
3. On the Exterior tab, set the Exterior Port to a port that is not being used. See the VisiBroker installation documentation for more details.
4. On the Properties tab, create a new property with values as described in the following table:

Value	Description
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
```

Additional Notes

- For more information on the parameters settings, 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, record the process IDs for later use. Before starting these processes, make sure all existing `ABM` processes are shut down.

Starting OSAgent

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

```
$ osagent &
```

You can use the following command to verify if OSAgent is already running:

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

Starting GateKeeper

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

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

Additional Notes

- <gatekeeper.properties path> is where your gatekeeper.properties file exists. In order to shut down the gatekeeper, verify that the associated child processes are killed as well (for example, 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 (that is, 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 each time you run the gatekeeper process. This file enables 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.

Starting Middle-Tier ABM Java Server Process

1. Log onto Release 11i environment using the applications owner account.
2. Edit abmsrvsst.sh to include 'nohup' before the jre command. The jre call should now be: 'nohup jre...', and this is valid only for Unix environments.
3. 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
```

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

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

Additional 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.

Submitting ABM Server Processes on a UNIX Platform

When using a UNIX platform as the middle tier for ABM, the NOHUP UNIX command should be used to ensure that the ABM processes are not terminated when the user who submitted the processes logs out of UNIX. For ABM certified UNIX platforms, the following syntax should be included in the abmsrvst script:

```
if [ "$DEBUG_MODE" = "Y" ]; then
    nohup jre -ms128m -mx1024m -DORBagentAddr=$ORB_AGENT_ADDR
    -DORBagentPort=$ORB_AGENT_PORT -DORBnullString=true
    -Djbo.logging.trace.threshold=3 -DIsLazyLoadingTrue=false
    -DEnterpriseMode=Y -Djbo.debugoutput=console
    -cp "$CLASSPATH" oracle.apps.abm.server.server.vb.AbmSessionAMServerVB
    -load oracle.apps.abm.AbmServer > abmsrvst.out &
else
    nohup jre -ms128m -mx1024m -DORBagentAddr=$ORB_AGENT_ADDR
    -DORBagentPort=$ORB_AGENT_PORT -DORBnullString=true
    -Djbo.logging.trace.threshold=3 -DIsLazyLoadingTrue=false
    -DEnterpriseMode=Y -Djbo.debugoutput=silent
    -cp "$CLASSPATH" oracle.apps.abm.server.server.vb.AbmSessionAMServerVB
    -load oracle.apps.abm.AbmServer > abmsrvst.out &
```

Also be sure to start the osagent and the gatekeeper with the nohup command as follows:

```
$ nohup osagent &
$ nohup gatekeeper -props gatekeeper.properties > gatekeeper.out &
```

Installing 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.

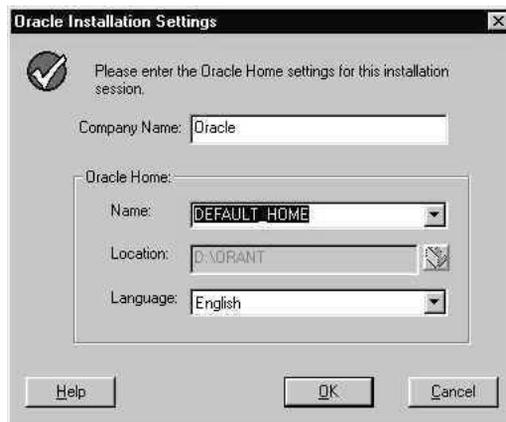
The First Task: Install Visibroker for Java 3.4

1. Download the VisiBroker patch from Metalink and unzip to a working directory.

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.

2. 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.

Figure 2–8 Oracle Installation Settings



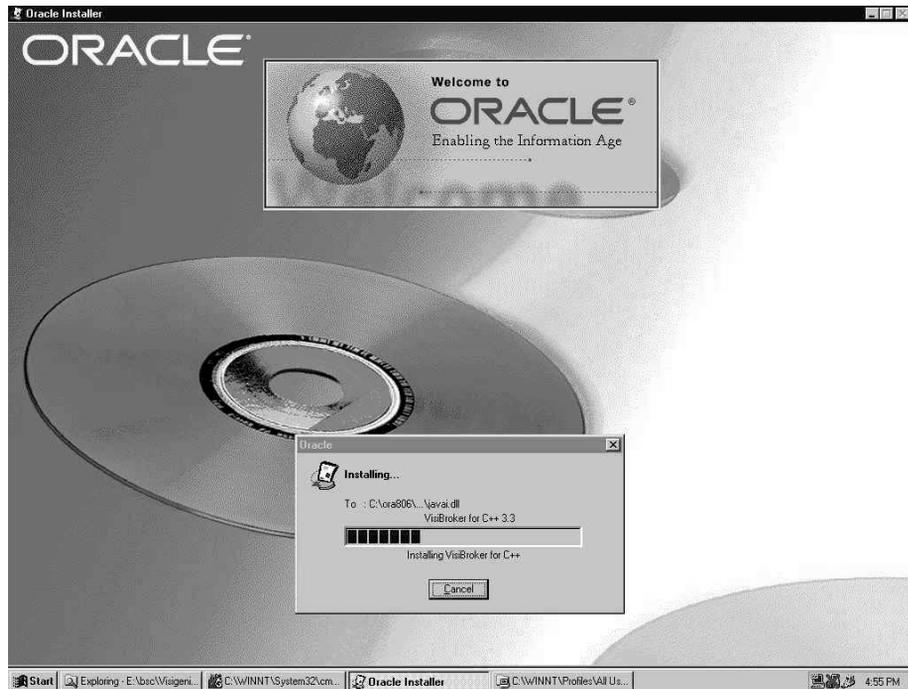
You can download JRE 1.1.8 and install it on your NT server. <JRE_PATH> in the subsequent steps is the root directory where the JRE is installed.

VisiBroker will be installed in <ORACLE_HOME>\vbroker. <ORACLE_HOME> is the directory path you entered in the previous screen. This 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.

The progress window appears as the installation starts. This window will disappear after installation completes successfully.

Figure 2–9 *Installation Progress Window*



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

These processes are needed to enable 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.

Setting 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
```

Additional 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.
- Verify that the `PATH` value 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.

Creating 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, 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:

1. Run `gkconfig` from `<VISIBROKER_INSTALL_DIRECTORY>\bin`.
2. 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.
3. On the Exterior tab, set the Exterior Port to a port that is not being used. See the VisiBroker installation documentation for more details.
4. 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
```

Additional Notes

- For more information on these parameter settings, 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.

Starting OSAgent

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

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

Starting 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 enable 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 and then entering the following command:

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

4. Log into your Release 11i Environment using the Application Owner account.

5. 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, 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
```

Additional 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
```

Defining 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 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

- **Discoverer and VisiBroker Compatibility:** Oracle Discoverer and Oracle ABM both use a VisiBroker CORBA server, and the Visibroker processes must be started on separate port numbers for the ABM middle tier, and the Discoverer middle tier. For VisiBroker compatibility information, see the Inprise web site at <http://www.inprise.com/visibroker/>.
- **VisiBroker Certification:** Check Metalink for specific platform certifications. VisiBroker installation files for Windows NT and Solaris are available on the installation CD. For other platforms, refer to Oracle Metalink for up to date information on required patches.

Granting 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, do the following:

1. If you do not want to use the provided ABM responsibilities, you can create new responsibilities for accessing ABM. (This step is optional.)
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. Refer to the *Oracle Applications System Administrator's Guide* for more information.
4. Assign ABM responsibilities to those users who need access to ABM.

Obtaining Assistance

Online Help links to the user guides for ABM, ABM Analyzer and SEM Exchange are available from the Self-Service Web Applications (SSWA) framework. A link to the ABM User Guide is also available when you select the help option from within the ABM application. To get access Help files within the application, do the following:

- Copy the ABM, ABM Analyzer and SEM Exchange User Guides from the 'DOCS' directory on the installation CD to the /OA_DOC directory.
- Configure the profile options within Oracle Applications to specify the location for each user guide. The profile options within Oracle Applications are as follows:
 - ABM: ABM Help
 - ABM: ABM Analyzer Help
 - ABM: SEM Exchange Help.

For example, the profile option for "ABM: ABM Help" may specify /OA_DOC/abmug1118.pdf as the value. See the readme.txt file for a complete list of the specific document file names.

The VisiBroker installation files for each supported platform are available from Metalink.

Adobe Acrobat Reader 4.0 enables you to view the user guide files for the set of ABM products.

Installing Web Reports

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

Prerequisites

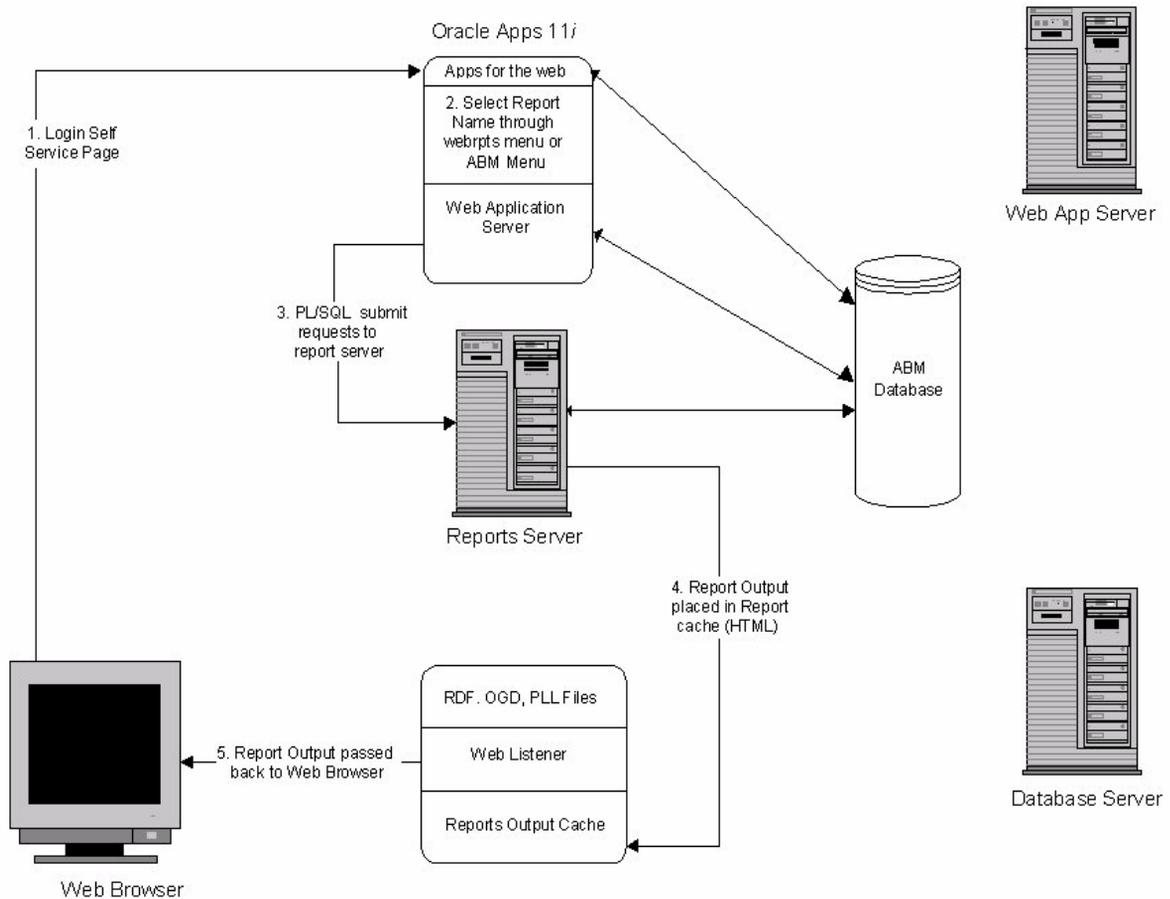
Before proceeding, be sure to do the following:

- Install and configure Oracle Applications Release 11i. 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 11i)
- Install and configure ABM 11i as described earlier in this guide.

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



Set Up the Environment

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

- AU_TOP/plsql for the .PLL files
- ABM_TOP/reports/US for the .RDF files

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

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

UNIX Variables

There are several UNIX variables to set up to enable reports with graphs.

It is recommended that you set up all UNIX variables in a shell script and use the script to start the Reports Server. Restart Reports Server to activate the variables. Oracle's sample `startreports.sh` script has a complete list of UNIX variables that needs to set up for launching reports successfully on the browser.

The DISPLAY Variable

This should point to the reports server machine which is running a valid xterm display, and should be set up in the following manner:

```
DISPLAY = <Customer's UNIX machine IP address running a valid xterm>:0.0;  
export DISPLAY
```

For example in Oracle's development environment:

```
DISPLAY=ap406sun.us.oracle.com:0.0; export DISPLAY
```

If the display variable is not setup, the following error will result:

```
REP:3000=Oracle Toolkit error
```

The TK_PRINT_STATUS Variable

This variable should be set up in the following manner:

```
TK_PRINT_STATUS="echo %n is valid"; export TK_PRINT_STATUS
```

The TK_PRINTER Variable

This should be pointing to a valid printer in your environment.

```
TK_PRINTER_=<Valid Printer>
```

For example, in Oracle's development environment:

```
TK_PRINTER=P1OP337A
```

Defining 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 cgcicmd.dat: page

Table 3–1 (Cont.) ABM Profile Options

Profile Option Name	Sample Value	Description
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)

Creating the 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 %*
```

Granting 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.

Netscape Navigator

To check the cache size in Netscape:

1. Select the Edit menu option > Preferences.
2. Double-click Advanced > Cache.

Internet Explorer

To check the cache size in Microsoft Internet Explorer:

1. Select View menu option > Internet Options.
2. On the General tab, select Settings.

Recommended Browser Settings

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

- **Text color:** Black.
- **Browser or user colors:** Choose browser colors. In Netscape, the the checkbox titled "Always use my colors" should be unchecked.
- **Variable width font:** Arial, size 10.
- **Fixed width font:** Times New Roman, size 10.
- **Default or document-specified fonts:** Choose document-specified fonts. If there is more than one document-specified option, you can select any of them.

Installing ABM Analyzer

This chapter discusses the process of installing and configuring ABM Analyzer for Discoverer 3.1. Before installing, check to see that you have all required software and hardware components. Also check with your system administrator to ensure that you have the necessary information.

You 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.

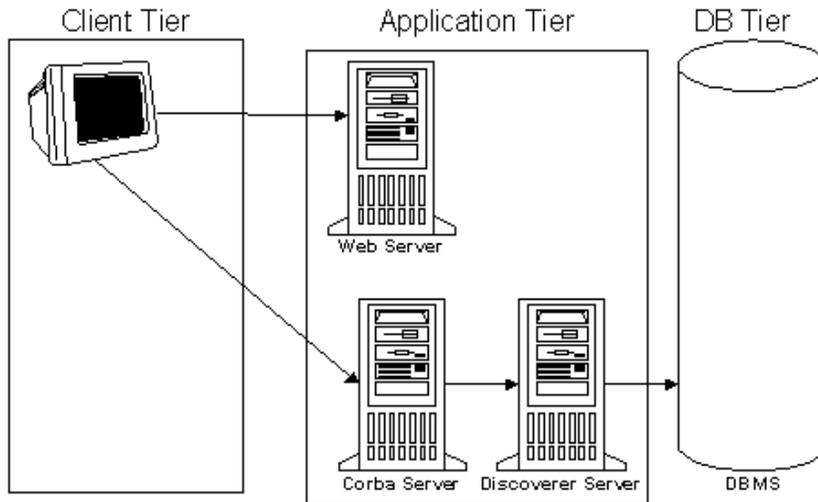
Throughout this chapter the notation <abmdir> refers to the root directory of the ABM Release 11i CD-ROM.

Note: See the readme.txt file in the baseline applications patch of Discoverer 4i for instructions on installing ABM Analyzer for Discoverer 4i.

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



Before Installation

Do the following tasks in the order shown before installing ABM Analyzer:

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 need an entry in the `tnsnames.ora` file on the Web Discoverer server.

Installing ABM Analyzer

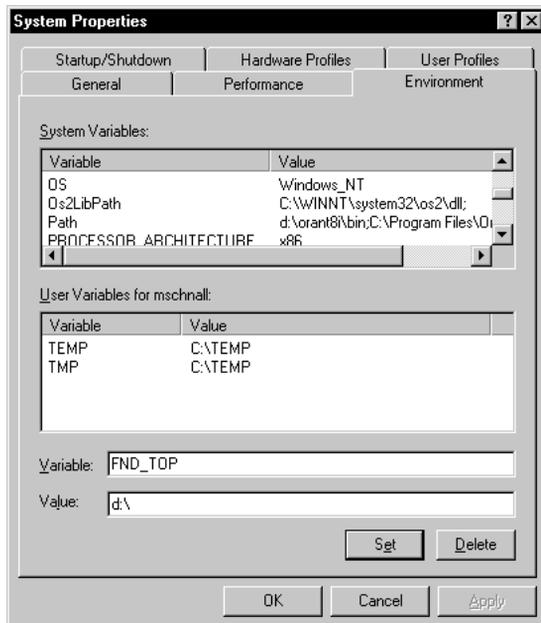
The ABM Analyzer installation process can be broken into these main steps:

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' (for example., `d:\secure`). Once this is completed, follow these steps:

1. From Windows NT, open the Control Panel and then select 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 (for example., `d:\`) of the 'secure' subdirectory you created earlier.

Figure 4–2 Create New System Variable in System Properties

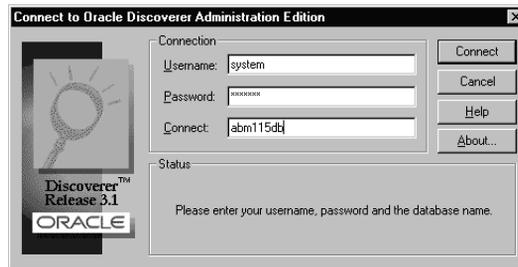
3. Copy the DBC file for each applications database into the %FND_TOP%\secure\ directory. In the first two steps above, FND_TOP was set to "d:\", therefore, copy the DBC file to d:\secure\. For instructions on creating DBC files, see *Oracle Applications Self-Service Web Applications Implementation Manual*.
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

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*.

Figure 4–3 Log into Oracle Discoverer Administration Edition



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. Select Yes to open the EUL Manager.

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

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

Figure 4–4 Create a EUL in EUL Manager



4. Create a new user as the owner of the EUL. Select 'Create a new user' and select whether you want to grant access to this EUL to the PUBLIC user schema.

Figure 4–5 Create a New User

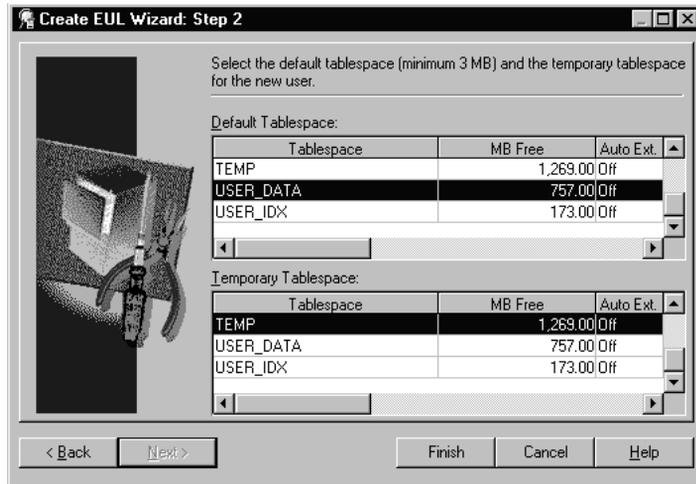


Next, enter a name for the User, as well as a Password. Select Next when you are ready.

Note: 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. Select Finish to create the EUL.

Figure 4–6 Create Tablespace for New EUL User

- 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 want 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 (for example, 'c:\stage):

```
abmimp.eex  
abmcowk.dis  
abmmatwk.dis  
abmdepwk.dis  
abmactwk.dis  
abmexpwk.dis  
abmexpwk.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 (for example, '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 Saving ABM Analyzer Workbooks).

Installing ABM Analyzer Business Areas

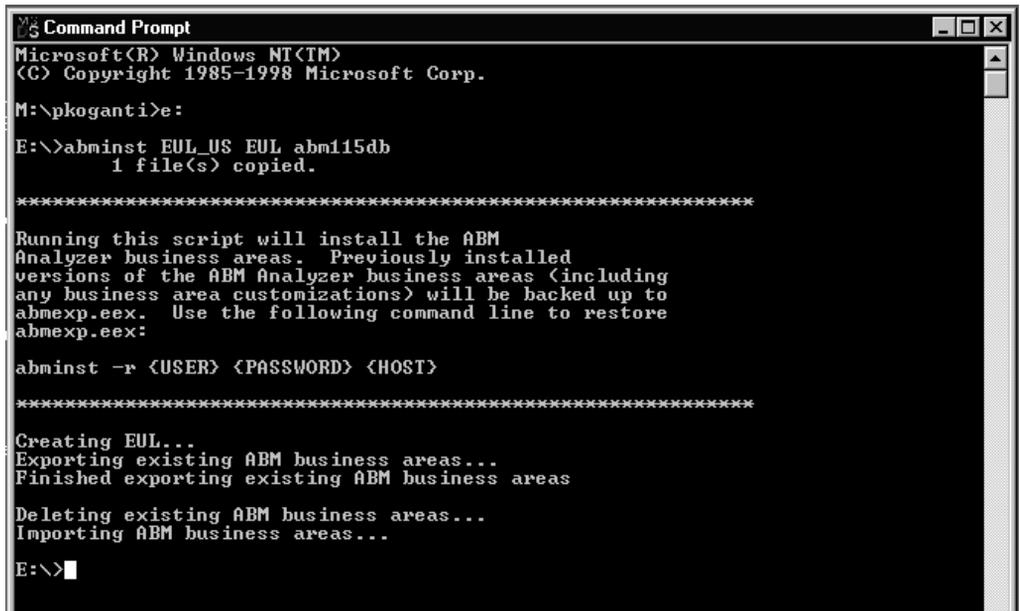
To install the ABM business areas, run the 'abminst.bat' file from the staging directory on your Discoverer server. You need the EUL owner database user ID, EUL password, and database name to complete this step.

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:

Figure 4-7 Confirmation Message From Batch File



```

Command Prompt
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 running the abminst command, you lose all attribute folders you created previously in any business areas you also created. To restore your old business areas, enter the following command:

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

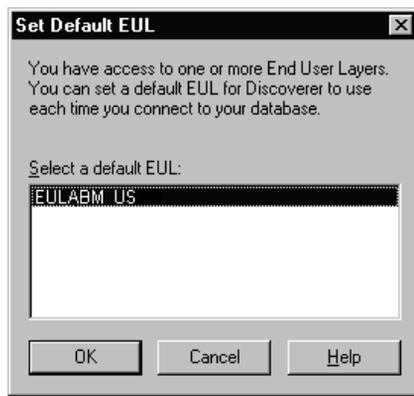
Close Discoverer Administrator Edition after the End User Layer is saved to the database. Check the log file, abminst.log, to ensure that the import ran successfully.

When you open Discoverer Administration or User Edition, set the default EUL before modifying your business areas using the following procedure.

Setting the Default EUL in Discoverer Administration Edition

1. Log into Discoverer Administration Edition in application mode, using the username of the EUL owner you created earlier.
2. Select File > Set Default EUL from the menu. You should see a window with a list of EULs:

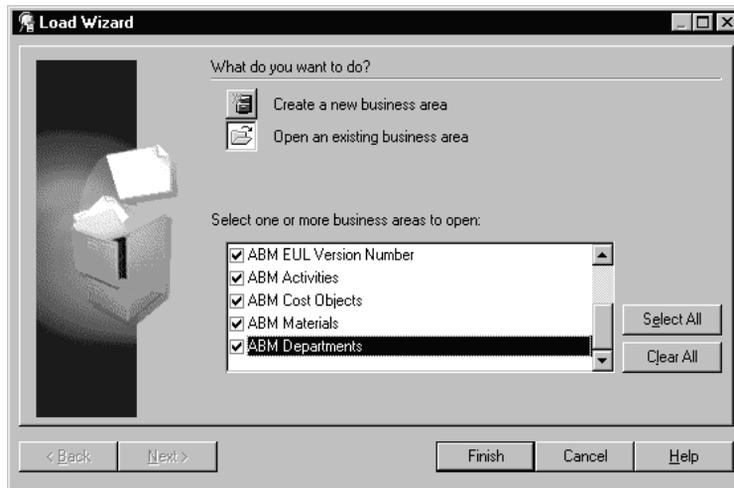
Figure 4–8 Set Default EUL



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

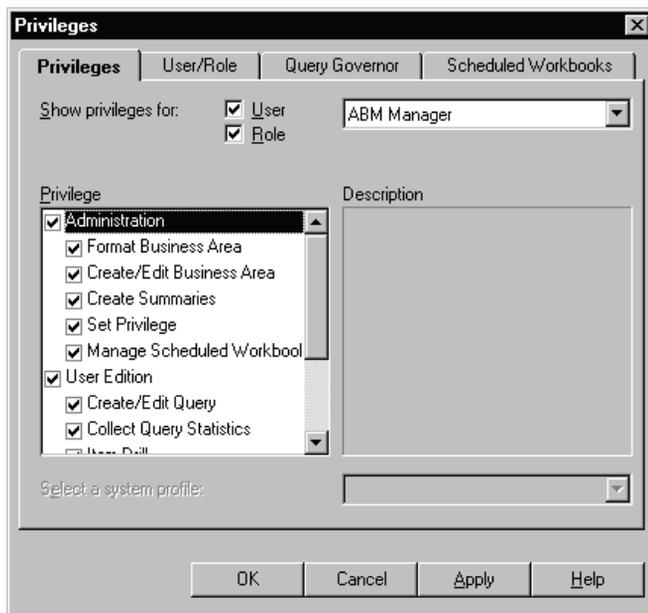
Granting Access to Discoverer Administrator and User Editions

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

Figure 4–9 Open an Existing ABM Analyzer Business Area

4. Select Tools > Privileges from the menu.
The Privileges window appears.

Figure 4–10 Privileges Window



5. Select the ABM Manager responsibility from the poplist and then mark the appropriate check boxes in the Privilege area to grant the related access privileges within Discoverer Administration or User Editions.
6. Select 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.

Creating the Applications User

You must create the Oracle Applications User through Oracle Applications. To do so:

1. Log into Oracle Applications as the system administrator responsibility.
2. Select Security > User > Define.
3. If your username is not assigned the system administrator responsibility, check with your organization's system administrator to get access.
4. Assign ABM Manager Responsibility to the User.

Figure 4–11 Assign ABM Manager Responsibility

The screenshot shows the Oracle Applications 'Users' form. The 'Securing Attributes' tab is active, displaying a table of responsibilities assigned to the user. The table has columns for Responsibility, Application, Security Group, and Effective Dates (From and To). One responsibility is listed: 'ABM Manager' for the 'Activity Based Mana' application, with a 'Security Group' of 'Standard' and 'Effective Dates' starting from '04-APR-1999'.

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

Setting 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.

Saving 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>
```

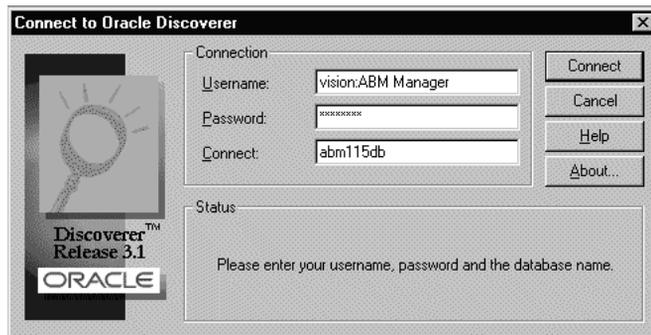
For example:

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

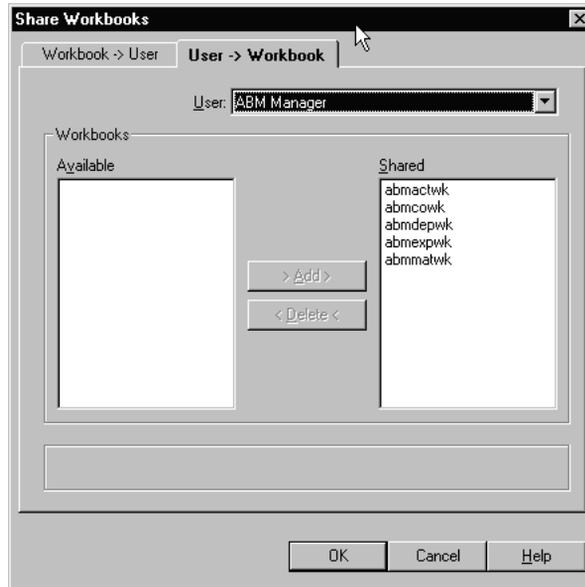
Granting Workbook Access to Oracle Applications Responsibilities

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.

Figure 4–12 Login to Oracle Discoverer User Edition

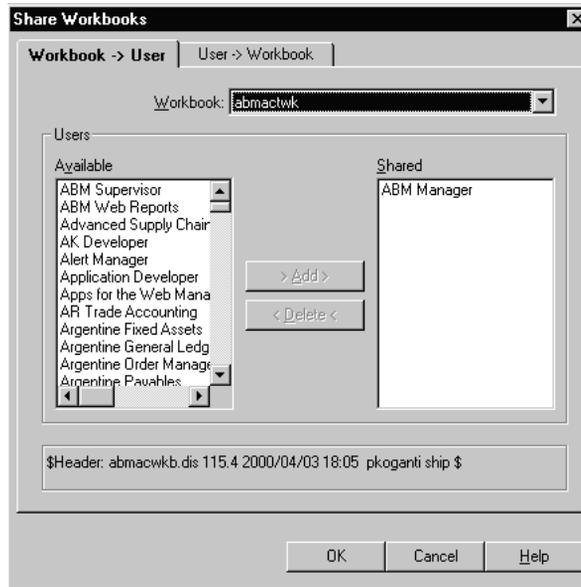


2. From the File menu, select Manage Workbooks > Sharing.

Figure 4–13 Manage Workbooks

3. Select the User > Workbook tabbed region.
4. From the User poplist, select 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 and then select the Add button to move them to the Shared area.
6. To see all the responsibilities that have been granted access to a workbook, select the Workbook > User tabbed region and 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".

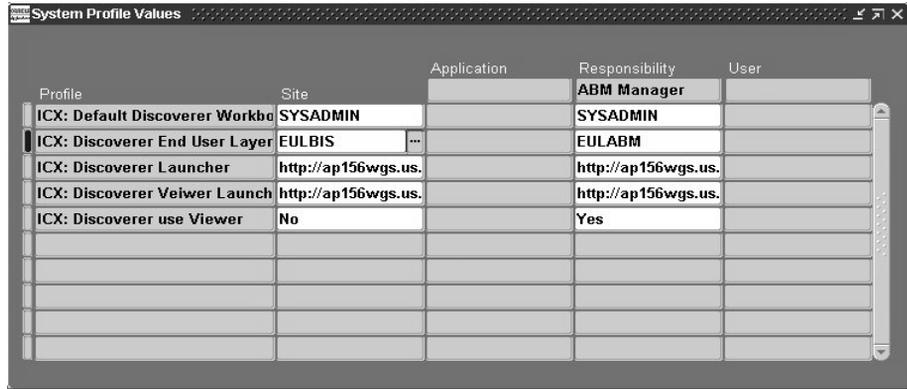
Figure 4–14 Determine Responsibilities



Defining Applications Profile Options

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:

Profile Option	Description
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

Figure 4–15 Enter System Profile Values


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

Following is an example of the Discoverer Launcher URL:

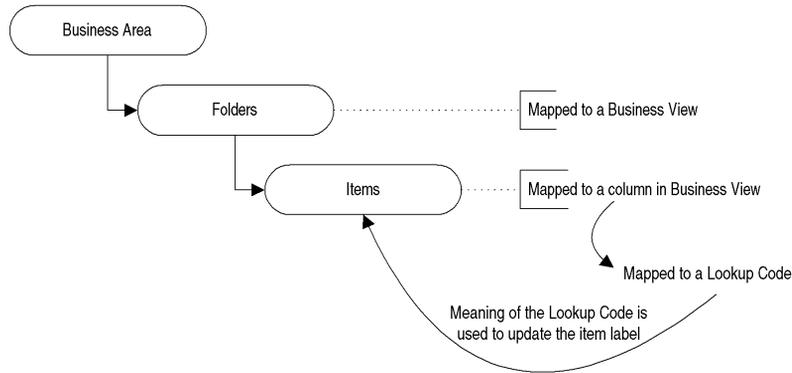
Figure 4–16 Oracle Discoverer Launcher URL

Updating Discoverer EUL Item Labels (Optional)

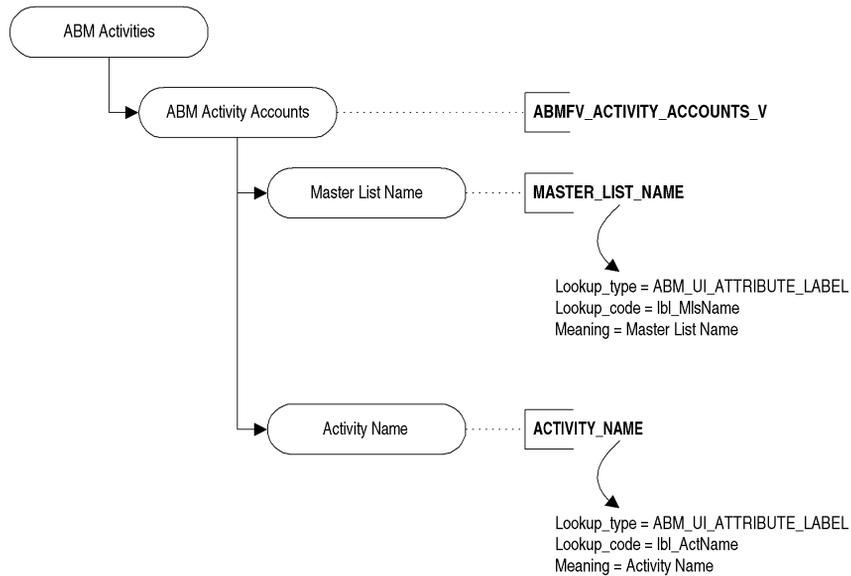
Updating Discoverer EUL item labels is required only if you want to use site modified labels in the Discoverer instance.

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

Figure 4–17 ABM Components Map 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'
```

Upgrading Custom Activa Workbooks to ABM Analyzer Workbooks

Before upgrading any existing Activa workbooks, you must first install ABM Release 11i and ABM Analyzer Release 11i.

1. Log in to 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, select the menu option File > Export. Enter the export filename when prompted and then select Save.
4. Log in to Discoverer Administration edition in APPS mode. Enter the EUL database userid and password to connect to the database.

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

5. From the menu select File > Import. Enter the file name from step 3 and then select OK.
6. Select 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.

7. Generate tagset views. Refer to *ABM Analyzer User Guide* for instructions on generating tagset views.
8. 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 the Control key to select multiple folders). Open the folder properties by clicking the right mouse button and then select Properties. In the Properties window, change the owner to Oracle Applications APPS schema name.

9. From the menu select File > Refresh, which opens the Refresh wizard. Select the Online option and select finish. This option lists all differences between the EUL object and it's corresponding database object.

If the list contains only the following invalid items and then select OK to remove them:

- sequence_number,
- account_reference,
- statistic_reference

10. From the menu Select View > Validate Folders. This validates all the folders and display any errors next to the folder name. Errors include things such as invalid table or column names.

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.

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

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

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

13. Save the workbook to database.

Granting Workbook Access

After you have saved the workbook to the database, you can grant workbook access to the ABM Manager responsibility. Optionally, you can grant access to other responsibilities.

1. Select Manage Workbooks > Sharing from the File menu,
2. Select the Workbooks > Users tab.
3. Select the workbook from the poplist.
4. Move the responsibility (ABM Manager) from the Available area to the Shared area.
5. Repeat steps 1 through 4 to grant access to other responsibilities.

To access your workbooks from Self Service, you must add them to the Self-Service Menu. The workbooks can also be accessed from ABM Application by choosing the ABM Analyzer option.

Adding workbooks to the menu involves two steps: creating a function to invoke Workbook, and adding the function to the Menu. The procedures are as follows:

Creating a Function to Invoke Workbook

1. Log in to Oracle Applications and select "Application Developer" responsibility
2. Navigate to Application > Function
3. Enter the values for Function and User Function Name
4. For "Type" always enter WWW
5. Select the Web HTML tab. In the HTML call field enter:
`OracleOasis.RunDiscoverer`
6. Select the Form tab. In the parameters field enter:
`workbook=<your workbook name>`

Note: You can view workbook functions created for ABM 11i by querying functions starting with ABM. This information should help you when creating new workbooks functions.

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

Adding the Function to the Menu

1. In the Application Developer responsibility, navigate to Application > Menu.
2. Query the menu that needs to be modified.
3. Add the function you created in the previous step to the menu.

For Additional Information

For additional information about upgrading your existing ABM Analyzer workbooks, refer to the following publications:

- *ABM Analyzer User Guide, Release 11i*
- *Oracle Discoverer 3.1 Administration Guide and Release Notes*
- *Oracle Discoverer 3.1 User Guide*

Launching ABM Analyzer from Self-Service Web Applications

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

1. Confirm that your PC has Oracle JInitiator installed.
2. Go to Start > Programs > JInitiator Control Panel. Select the following options from the Basic tabbed region:
 - **Show Java Console:** Deselect if selected
 - **Enable JInitiator:** Select
 - **Network Access:** Unrestricted
 - **Java Runtime Parameters:** -dx100m -dcache.size=20M
3. Click Apply.

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

4. 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`

5. Enter your username and password to log in.
6. Select the ABM Manager link.
7. Select any workbook link under the Workbooks area of your screen.

Installing SEM Exchange

This chapter explains how to install SEM Exchange 11*i* in an Oracle Applications Release 11*i* environment. The chapter 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

Before installing SEM Exchange, do the following:

- 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 11*i* 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 11*i*.

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

1. Log on to your Release 11i environment using the Oracle Applications owner account.
2. Choose the correct patch directory.
3. Download the latest SEM Exchange patch for 11i from Metalink.
4. Use ADPATCH to install the patch driver c*.drv. This driver needs to be applied on all servers in your Release 11i environment.

Note: The asterisk (*), here and in the next two steps, represents the latest patch number referenced from Metalink.

5. Install the SEM Exchange server patch d*.drv using ADPATCH. This patch creates the database objects, packages, and seed data. This driver must be applied to the administration server only.
6. Install the SEM Exchange server patch g*.drv 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.
7. Restart the concurrent manager. See "Server Processes," *Maintaining Oracle Applications*, Release 11i.
8. 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.
9. 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

Verifying Installation

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

Verifying Oracle SEM Exchange Forms

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

Verifying 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 SEM Exchange and Oracle General Ledger Versions 10.7 NCA/11.0 with ABM Release 11i

Required Software Components

- SEM Exchange 10.7 NCA/11.0
- ABM 11i
- Oracle Applications Release 11.0 with the 11.03 (or later) maintenance pack applied and GL full installed. Or for 10.7 NCA customers, Oracle Applications Release 10.7 NCA with GL patchset A applied.

Installation Procedure

1. Install ABM 11i and SEM Exchange 11i in the Oracle Applications 11i instance. (See previous sections.)
2. Confirm that SEM Exchange for 10.7 NCA or 11.0 has been installed. This patch is available from the 10.7NCA or 11.0 Oracle Applications Installation CD.
3. Apply the SEM Exchange c1248059.driv patch to the 11.0 or 10.7 instance. This patch enables the earlier versions of SEM Exchange and the General Ledger to integrate with the new 11i version of ABM.
4. Create a database link between the 10.7 NCA/11.0 instance and the ABM 11i database instance.
 - a. Logon to Oracle Applications Release 10.7/11.0 database instance via SQL*Plus using Oracle Applications owner account (APPS).
 - b. Run the following script from the SQL> prompt:

```
@$EAA_TOP/patch/110/sql/eaalinks1.sql <db link name> <ABM 11i un_apps>
<ABM 11i pw_apps> <ABM 11i ORACLE_SID>
For example:

SQL>@$EAA_TOP/patch/110/sql/eaalinks1.sql semx110_abm11i apps
apps abm11idb

For 10.7:

@$EAA_TOP/patchsc/107/sql/eaalinks1.sql <db link name>
<ABM 11i un_apps> <ABM 11i pw_apps> <ABM 11i ORACLE_SID>
For example:

SQL>@$EAA_TOP/patchsc/107/sql/eaalinks1.sql semx107_abm11i apps apps
abm11idb
```
 - c. Check eaalinks1.log for any errors in your current directory.
 - d. Verify the database link creation by reviewing the contents of the user_db_links table.
5. Apply the d1248059.driv patch to the 10.7 NCA/11.0 environment. This driver will upgrade seed data and the SEM Exchange data model.
6. Apply the g1248059.driv patch to the 10.7 NCA/11.0 environment. This driver will regenerate the forms and reports.

Migrating Data From Activa 3.x

If you are currently running a version of Activa 3.x, you need to migrate your data from the existing database to the new ABM Release 11*i* format.

Before doing so, do the following:

- Install ABM 11*i* as part of an Oracle Applications 11*i* instance.
- Migrate from an Activa 3.x database to an 11*i* database using a clean ABM 11*i* schema. Remove all data other than the preinstalled seed data.

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

Purging Existing ABM User Data from the Applications 11*i* Database

1. Disable foreign key constraints:
 - a. Log into the database as abm.
 - b. 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:
 - a. Log onto SQL*Plus using the APPS user ID.
 - b. 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. 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.

Note: 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

5. Verify that a TNSNAMES entry exists for the Activa 3.x database that you are migrating, in relation to your Applications 11i instance.

The Migration Process

There are four tasks involved in the migration process:

1. Create a DB Link from your Activa 3.02 database to the Applications 11i database, and apply stored procedures to run the migration.
2. Disable Foreign Key Constraints in ABM Schema.
3. Run the Data Migration Concurrent Program.
4. Enable the Foreign Key Constraints in the ABM Schema.
5. Reset the Starting Number of All Sequences in the Database.

Each of these tasks is described in detail as follows.

Creating DB Link

The first task in the migration process is to create a DB Link from your Activa 3.02 database to the Applications 11i database, and apply stored procedures to run the migration.

To do this, run the script abmlnksy.sql against the APPS schema of your 11i database. This script creates a DB Link from the APPS Schema of the 11i database to the Activa database. It also creates any necessary synonyms for 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
```

Disabling Foreign Key Constraints

The second task in the process is to disable Foreign Key Constraints in ABM Schema:

1. Run the script abmfkcon.sql against the Apps schema of your 11i database. This disables 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.

Running the Data Migration Concurrent Program

The third task is to run the Data Migration Concurrent Program:

1. Log onto Oracle Applications and select the ABM Supervisor responsibility. Navigate to Requests and then select Run.
2. Select Single Request.
3. From the list of concurrent programs, select ABM:Migrate Data from Activa Activa 3.x and then click OK.
4. In the parameters window, you must 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 occurring after this date will be selected for migration. If you select 01-JAN-1995 and then all datasets after that date will be migrated. Any data sets prior to that date will not be migrated. If you do not select a date, all data sets will be migrated.
- **Default Data Set Name (Required):** This data set contains consumption quantities after the migration is performed. (In Activa 3.x, consumption quantities were not stored in a data set.) You are provided a list of values for all of the existing data sets in your Activa 3.02 database.
- **Default Activity Hierarchy ID (Required):** Because 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.

Enabling the Foreign Key Constraints

The fourth task is to enable the Foreign Key Constraints in the ABM Schema:

1. Run the `abmfken.sql` script against the ABM schema of your 11i database. This enables 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 is 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!

Resetting the Starting Number of All Sequences

The fifth task is to reset the Starting Number of All Sequences in the Database:

1. Run the `abmupdsq.sql` script against the Apps schema of your 11i database.

Usage:

```
$ sqlplus apps/apps@<db>  
sql>@abmupdsq.sql
```

2. Check the admupdsq.log for errors.

Notes on the Migration Process

BOR Consumption Quantities

In Activa 3.02, consumption quantities are maintained by bill type, but in ABM 11i, consumption quantities are maintained in a data set. The data migration process creates consumption quantities for each bill type in a single data set.

Calculations

We recommended that you run calculations in Activa before you upgrade your data to ABM 11i.

Cross Model References

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 results in a situation where referential integrity constraints are not being enforced. It is important that models be migrated sequentially, keeping in mind any dependencies.

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 11i and is NOT migrated.

In ABM 11i, you MUST enter this parameter before running any Cost Object Unit Cost Calculations for the first time.

Database Specific Sequence Numbers

After the migration process has completed, you must reset the starting number for all sequences in the database. Run the admupdsq.sql script against the Apps schema of your 11i database. The usage is as follows:

```
$sqlplus apps/apps@<DB>
```

```
SQL>@abmupdsq.sql
```

When complete, check the abmupdsq.log for any errors.

Mapping Formulas

Mapping formulas from Ariba 3.x are transformed into a mapping calculation with parameters and source and targets. The 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.)

Navigation Procedures

Navigation procedures from Ariba 3.x are not migrated. You need to enter any navigation procedures again in ABM 11i.

Security

Security is migrated, but ABM 11i provides much greater granularity. See *ABM User Guide* for details.

- **SQL Scripts:** SQL Scripts required for the migration procedure include:
 - abmprgdt.sql
 - abmlnksy.sql
 - ABMFKCON.sql
 - ABMFKEN.sql
- **Tracing on Migrated Data:** Visual tracing requires that a consistent calculation log is available. However, the migration process does not migrate the calculation log, so you must re-run your calculations to create a calculation log in order to utilize the visual trace feature.

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