

Oracle® Balanced Scorecard

Administrator Guide

Release 11i

Part No. A95236-10

April 2006

Oracle Balanced Scorecard Administrator Guide, Release 11i

Part No. A95236-10

Copyright © 1999, 2006, Oracle. All rights reserved.

Primary Author: Claudia Castro, Patricia Perdomo, Sameer Chhabra

Contributing Author: Christine Monk, Vinod Bansal, Manuel Puyana, Kris Sudharsan, Ling Wu, Ultan O'Broin

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software–Restricted Rights (June 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Contents

Send Us Your Comments

Preface

1 Introduction

Balanced Scorecard Methodology	1-1
Balanced Scorecard Perspectives	1-2
Oracle Balanced Scorecard	1-2
Overview of Designing Scorecards	1-6
Overview of Administering Scorecards	1-7

2 Scorecards

Overview of Creating Scorecards	2-2
Create Scorecards and Scorecard Hierarchies	2-3
Add Objectives	2-5
Enable Views	2-6
Create Custom Views	2-8
Create Launchpads	2-11
Enable Additional Information Column	2-12
Add Logos	2-13
Set Up Alarms if Performance is Above 100%.	2-13
Set Up Pie Chart.	2-13
Configuring the Scorecard View	2-14
Formatting Directional Lines	2-15
Defining Other Scorecard Properties in Architect	2-15
Moving Objectives	2-17
Copying Objectives from a Source System using Architect	2-17
Defining Common Dimensions (List Button) at Scorecard Level	2-18
Defining Dimension Filters for a Scorecard.	2-23

3 Objectives

Overview of Creating Objectives	3-1
Create Objectives	3-2
Create Dimensions	3-14

Create Custom Calendars and Periods	3-18
Create Dashboards and Reports	3-20
Defining Other Objective Properties - Architect.	3-20
4 Portlets	
Balanced Scorecard Portlets	4-1
Objective Graph Portlet	4-1
List of Objectives Portlet.	4-3
Custom View Portlet	4-4
Multiple User Support	4-5
Grant Access to a Balanced Scorecard Portlet	4-6
5 Security	
Assign Responsibilities to Users	5-1
Assign Scorecards to Users	5-2
Assign Roles to Designers	5-4
6 Set Up	
Set Up Global Parameters	6-1
7 Generate Database	
Overview of Generating the Database	7-1
View Current Status	7-2
Run the Generate Database Process	7-3
Review Objectives/Reports and Tables Documentation	7-8
Monitor Requests	7-9
Balanced Scorecard Calculation Capabilities	7-9
Troubleshooting.	7-12
8 Data Loader	
Overview of Loading Data	8-1
Load Dimension Objects	8-1
Load Interface Tables	8-6
Load Objectives or Reports	8-10
Delete Objective or Report Data	8-11
Advance Calendar	8-12
Monitor Requests	8-13
9 User Sessions	
Manage Multiple User Sessions.	9-1

10 Migration

Overview of Migrating Balanced Scorecard Systems	10-1
Migrate Systems	10-1

Send Us Your Comments

Oracle Balanced Scorecard Administrator Guide, Release 11i

Part No. A95236-10

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

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most about this manual?

If you find any errors or have any other suggestions for improvement, please indicate the title and part number of the documentation and the chapter, section, and page number (if available). You can send comments to us in the following ways:

- Electronic mail: appsdoc_us@oracle.com
- FAX: 650-506-7200 Attn: Oracle Intelligence Documentation Manager
- Postal service:
Oracle Intelligence Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
USA

If you would like a reply, please give your name, address, telephone number, and electronic mail address (optional).

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

Preface

Intended Audience

Welcome to Release 11i of the *Oracle Balanced Scorecard Administrator Guide*.

This guide is intended for users who create and administer scorecards in Oracle Balanced Scorecard. For information on viewing scorecards, see: *Oracle Balanced Scorecard User Guide*.

See Related Documents on page x for more Oracle Applications product information.

TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Structure

- 1 Introduction
- 2 Scorecards
- 3 Objectives
- 4 Portlets
- 5 Security
- 6 Set Up
- 7 Generate Database
- 8 Data Loader
- 9 User Sessions
- 10 Migration

Related Documents

Oracle Balanced Scorecard User Guide

Oracle Balanced Scorecard About Document, available on Oracle Metalink.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

Introduction

This chapter covers the following topics:

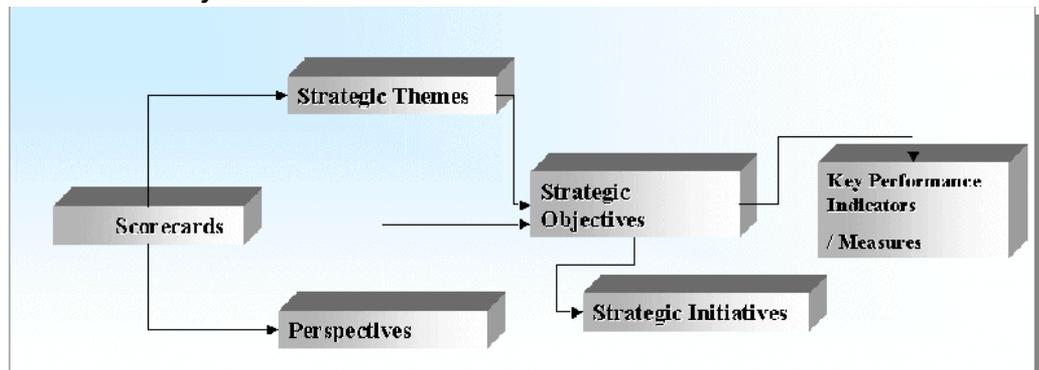
- Balanced Scorecard Methodology
- Balanced Scorecard Perspectives
- Oracle Balanced Scorecard
- Overview of Designing Scorecards
- Overview of Administering Scorecards

Balanced Scorecard Methodology

Traditional performance measurement systems typically do not provide top managers with a comprehensive view of the organization. The Balanced Scorecard is a performance measurement methodology, developed by Kaplan and Norton, that exceeds the typical scope of traditional performance measurement systems. The Balanced Scorecard methodology links the financial goals of an enterprise with the drivers that determine future success.

The Balanced Scorecard methodology translates an organization's mission and strategy into a set of strategic objectives and key performance indicators (KPIs). It provides the framework for a strategic management system that enables executives to monitor the success of the strategy across the organization. While Balanced Scorecard retains an emphasis on achieving financial objectives, it also includes other important perspectives, such as, customer, processes, learning, and growth that drive these financial objectives. The following figure shows the typical elements of the Balanced Scorecard methodology.

Scorecard Theory



In the preceding figure, each scorecard contains a set of strategic themes and perspectives. These themes and perspectives are translated into strategic objectives. Strategic objectives are supported by strategic initiatives and can contain one or more measures. Strategic initiatives are the critical projects that an organization needs to complete to accomplish a strategic objective. Measures are the areas that an organization needs to focus on to accomplish a strategic objective. Measures are usually associated with a plan and an owner, so the people who are involved can follow up on the implementation of the strategy.

Balanced Scorecard Perspectives

The Balanced Scorecard methodology measures performance using four perspectives:

- Financial Perspective
- Customer Perspective
- Internal Business Process Perspective
- Learning and Growth Perspective

The Balanced Scorecard methodology assumes that the **financial perspective** includes *lagging indicators*, and that management's attention should be focused on the underlying factors that drive those indicators. In the Balanced Scorecard methodology, the customer, internal business processes, and learning and growth perspectives all combine to drive financial performance.

You need to understand how the financial perspective is related to the other Balanced Scorecard perspectives.

The **customer perspective** drives the financial perspective because customers buy a company's products and services, and they are, ultimately, responsible for the company's financial success.

The **internal business process perspective** supports the customer perspective because the company must be well run to satisfy its customers.

The **learning and growth perspective** impacts the internal process perspective because the employees must continually reeducate themselves and learn the best processes to run the company.

Together, the four Balanced Scorecard perspectives represent a typical conceptual grouping of measures; however, measures can also be grouped by objective, organizational unit, or function. Additional perspectives can be added depending on the organization's environment and strategic goals; or the names of perspectives can be changed to better reflect the organization and its values.

Oracle Balanced Scorecard

Oracle Balanced Scorecard is a strategic management application that is based on the Balanced Scorecard methodology developed by Kaplan and Norton.

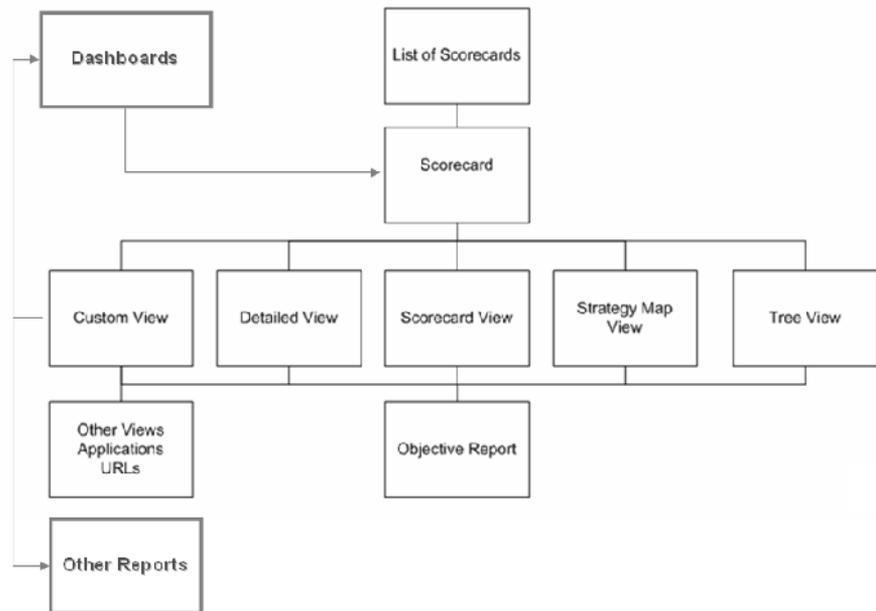
It enables companies to measure performance by representing their strategy in scorecards that are supported by objectives and KPIs.

Conceptually, each strategy can be broken down into one or more scorecards. Each scorecard contains a set of objectives that you can use to judge the performance of the scorecard. In turn, each objective can be supported by several KPIs.

Within Oracle Balanced Scorecard, each scorecard can be represented by several views. Each view lists the objectives that belong to the scorecard. You can drill on each objective to view an objective report which provides detailed information about the objective and the KPIs that support the objective. If you drill from the Custom View you can also drill to other views, applications, or URLs.

Oracle Balanced Scorecard is integrated with Oracle Daily Business Intelligence. Balanced Scorecard users who implement Daily Business Intelligence, can use the complete library of preseeded or custom content from Daily Business Intelligence. Leveraging preseeded Daily Business Intelligence content eliminates the need to map or load data into Balanced Scorecard, because the preseeded content is already mapped to Oracle Applications tables.

Scorecard Navigation



The scorecards are used and supported by three different types of users:

- **Viewers:** Are the end-users who are responsible for using scorecards to monitor performance.
- **Designers:** Are responsible for creating the scorecards.
They can also create custom dashboards and reports, and publish them.
- **Administrators:** Are responsible for setting up the application and maintaining the data structure.

The *Oracle Balanced Scorecard User Guide* describes how viewers can use scorecards to monitor performance.

The *Oracle Balanced Scorecard Administration Guide* describes how designers and administrators can create the scorecards and the data that are required to monitor performance.

Terminology

Before you begin using Oracle Balanced Scorecard, you should understand the following terms:

- **Strategy:** A high-level plan that a company wants to follow. A strategy is generally a collection of objectives. For example, a strategy might be to improve overall business by increasing customer satisfaction, reducing the cost of goods sold, and increasing sales.
- **Scorecard:** A representation of a company strategy that maps objectives and KPIs to the strategy using the Balanced Scorecard methodology. Viewers use the scorecard to compare actual and planned performance.
- **Key Performance Indicators (KPIs):** A calculation or metric that is used to support an objective. Each objective can be supported by one or more KPIs; however, there is only one default KPI for each objective. The status of the default KPI determines the status of the objective. KPIs can be preseeded or created by the scorecard designer.
- **Objective:** A strategic statement that represents a specific goal in a particular area. For example, Increase Revenue, Reduce Service Calls, and Maximize Sales Growth.
- **Objective Groups:** Classification categories for Objectives.
- **Perspective:** The categories within which you classify KPIs and strategy components. Usually, four perspectives are available: financial, customer, internal, and learning. Some scorecard views display assessments that are grouped by perspective.

In the application, the perspectives can be created as Objective Groups.

- **Alarm:** Indicates the status of an objective. The possible statuses are acceptable, marginal, or unacceptable. The status is based on how the objective falls within a set of defined tolerance ranges for the objective's expected performance. For example, if Revenue decreases by more than 5%, then the alarm will indicate that Revenue is either marginal or unacceptable performance, depending on how the tolerance ranges are set. If an objective is supported by several KPIs, then the status of the objective is the status for the default KPI for the objective.
- **Production:** Refers to any scorecard that is available to viewers in the List of Scorecard window. To be a production scorecard, the design must be complete and the Generate Database process and the Data Load process must have been run. Also, the user must be assigned access for the scorecard.
- **View:** A way of viewing a scorecard.

Each view is designed to provide a different perspective on that content by focusing on a different purpose, audience, layout, or organizational scheme. Five possible views are available in Oracle Balanced Scorecard:

- **Tree view:** It lists all objectives in the scorecard, organized into a tree that represents the perspectives or strategic themes of the scorecard. This view also shows the KPIs that support the objective.
- **Scorecard view:** It lists all objectives in the scorecard, organized into boxes. Each box represents a logical grouping of perspectives or strategic themes for the scorecard.
- **Strategy Map view:** It displays the cause and effect relationships between objectives. By depicting the strategy in this way, strategy maps explain not only

what the organization wants to achieve (their financial outcomes), but also how they expect to get there through a series interrelated objectives. Strategy maps also help employees see how their jobs are linked to the organization's overall objectives.

- **Detailed view:** It contains a complete list of objectives and KPIs in the scorecard. The detailed view displays the underlying data for each objective including: Actual, Plan, Variation, and Percent of Plan data. This view enables interpretation on how the alarms are calculated for each objective.
- **Custom view:** It can be designed for a specific audience or organizational schemes. It enables navigation across multiple related views and drill down to more detailed information for a particular scorecard. It also contains unique features, such as, *Hotspots* that link to an objective, and *Custom View Link* that link one custom view to another.
- **Dashboard:** A dashboard is a collection of content that is designed to meet the needs of a particular responsibility. Dashboards contain regions like parameters, tables, graphs, links, and KPIs.
- **Parameter:** Each dashboard contains a set of parameters that you can use to change the data that is displayed on the dashboard. Some parameters, such as Date or Period are common to all dashboards. Other parameters, such as Commodity, are unique to a specific dashboard. Parameters are based on dimensions, which organize data into reporting hierarchies. Each dashboard has a parameter that acts as the primary dimension for the dashboard. The primary dimension differs depending on the dashboard. For example, the primary dimension on the Profit and Loss dashboard is Manager.
- **Region:** A region is a unique set of information on a dashboard. There are types of regions: parameter, KPI, table, graph, custom scorecard, RSS feed, simulation view, links, and My Approvals. You can drill down to more detailed reports or to transaction details in Oracle Applications from all regions with the exception of the parameter region.
- **Reports:** You can drill to a report from any linked value in a dashboard. In general, reports contain detailed information on one or more KPIs. Reports contain graphs and a table region and they contain more parameters than a dashboard. Reports do not contain truncated values. You can drill from some reports directly into the transactional system.
- **Administrator:** The Balanced Scorecard administrator is responsible for installing, implementing, and maintaining Balanced Scorecard. The Balanced Scorecard administrator loads data and is responsible for managing any data-related issues. The scorecard administrator is also responsible for creating and setting up users, and securing scorecards, objectives, and display options.
- **Designer:** The Balanced Scorecard designer is responsible for creating the scorecards, views, KPIs, objectives, and dimensions. The scorecard designer defines the default settings for scorecards and the objective report. The scorecard designer also sets the alarm conditions for the objectives.

The scorecard designer can also create custom dashboards and reports, and publish them.
- **Viewer or End User:** The Viewer is the user who is responsible for using the scorecard to compare actual corporate performance to planned or forecasted performance.

- **Preseeded:** In this guide, *preseeded* is used to denote any content that is provided with Oracle Applications. For example, Oracle Daily Business Intelligence provides several preseeded KPIs that can be reused in other applications.
- **Custom:** In this guide, *custom* is used to denote any content that is created using the application.

Overview of Designing Scorecards

Designers are responsible for translating corporate strategy into the scorecards that enable Viewers to monitor corporate performance.

Designers with the Performance Management Designer responsibility can create dashboards, reports, and scorecards. They can create KPIs, dimensions, and objectives that support these scorecards. They can also publish dashboards and reports.

The Performance Management Designer menu provides access to the following features:

- Reporting
 - Dashboard Designer
 - Report Designer
 - Publish
 - Scorecard Designer
 - Launchpads
- Performance Measurement
 - Measure Designer
 - Dimension Designer
 - Objective Designer

The following scorecard design features, which are described in this guide, are available only in Balanced Scorecard Architect.

- Scorecard
 - Filter Common Dimensions
 - Add Logos
 - Set Up Alarms if Performance is Above 100%
 - Set Up Pie Chart
- Objective
 - Create Multiple Bar KPI
 - Create Simulation Tree
 - Create Profit and Loss Indicator

You can access these features using the Performance Management Designer responsibility, but you must have implemented Balanced Scorecard Architect. For more information on how to implement BSC Architect, see: *Oracle Balanced Scorecard Install Guide*.

Overview of Administering Scorecards

Administrators are responsible for supporting the Balanced Scorecard Viewers and Designers by securing scorecards, generating the necessary database objects, loading data, performing data maintenance tasks, and implementing system migration.

Administrators with the Performance Management Administrator responsibility have access to the following features:

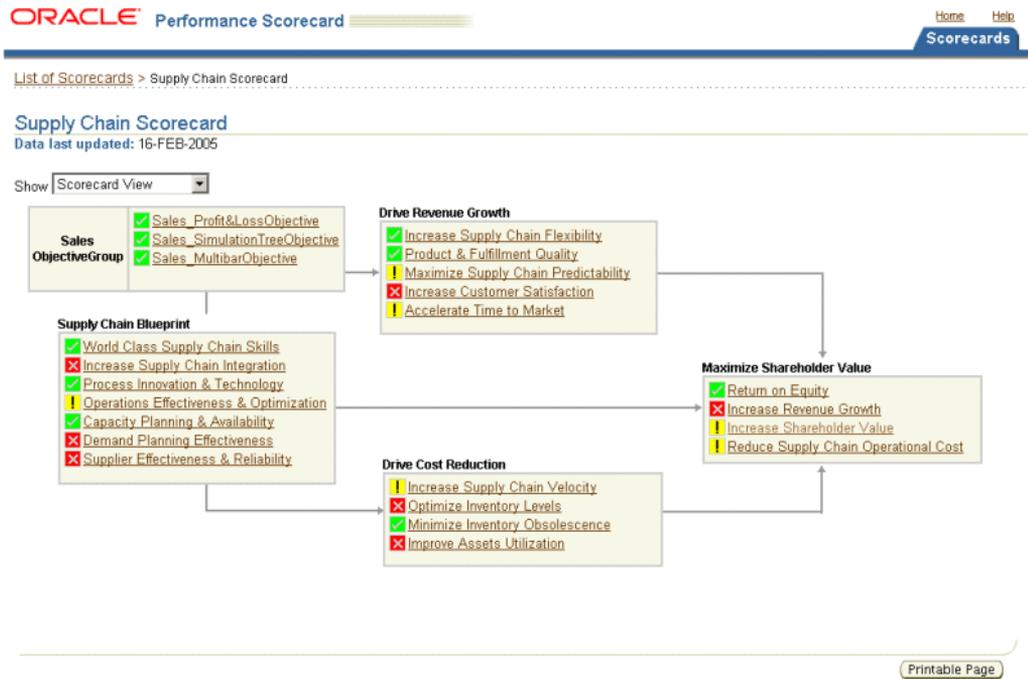
- Global Setups
- Database
 - Generate Database
 - Review Objectives/Reports
 - Review Tables
 - Monitor Requests
- Data Loader
 - Dimension Objects
 - Objectives/Reports
 - Interface Tables
 - Maintain Calendars
 - Monitor Requests
- Session Management
- Security
 - Administer End User Access
 - Administer Designer Access
- Migration

Scorecards

This chapter covers the following topics:

- Overview of Creating Scorecards
- Create Scorecards and Scorecard Hierarchies
- Add Objectives
- Enable Views
- Create Custom Views
- Create Launchpads
- Enable Additional Information Column
- Add Logos
- Set Up Alarms if Performance is Above 100%
- Set Up Pie Chart
- Configuring the Scorecard View
- Formatting Directional Lines
- Defining Other Scorecard Properties in Architect
- Moving Objectives
- Copying Objectives from a Source System using Architect
- Defining Common Dimensions (List Button) at Scorecard Level
- Defining Dimension Filters for a Scorecard

Overview of Creating Scorecards



A *scorecard* is a representation of a company strategy that maps objectives, key performance indicators (KPIs), and dimensions to the strategy based on the Balanced Scorecard methodology.

Viewers use the scorecard to compare actual and planned performance. A complete description of how to use scorecards is available in the *Oracle Balanced Scorecard User Guide*.

Before you begin creating scorecards:

- Do a thorough analysis of how your corporate strategy maps to scorecards and objectives.
- Define objectives, KPIs and dimensions before you create scorecards. You must assign at least one objective before you move your scorecards from prototype into production.

The process for creating a scorecard is simple:

- Create scorecard and optionally define your scorecard hierarchy.
- Add KPIs.
- Enable views.

After you create a scorecard, designers and administrator can configure other secondary tasks at scorecard site level such as:

- Enable the Additional Information column for the List of Scorecards.
- Add corporate logos or branding images to the header of all scorecards.

In addition, for each scorecard, the administrator can filter the common dimensions and dimension values displayed by responsibility. For example, you can filter a scorecard so that sales managers only see sales data for the regions for which they are responsible.

The designer, and in some cases the administrator, can perform the following scorecard-specific tasks:

1. Create Scorecards and Scorecard Hierarchies, page 2-2
2. Add Objectives, page 2-5
3. Enable Views, page 2-6
4. Create Custom View, page 2-8
5. Create Launchpads, page 2-11
6. Enable Additional Information Column, page 2-12
7. Add Logos, page 2-13
8. Set Up Alarms if Performance is Above 100%, page 2-13
9. Set Up Pie Chart, page 2-13

Related Topics

Oracle Balanced Scorecard User Guide

Create Scorecards and Scorecard Hierarchies

ORACLE Performance Management Designer [Home](#) [Logout](#) [Preferences](#) [Diagnostics](#)

Reporting Performance Measurement

[Dashboards](#) | [Reports](#) | [Publish](#) | **Scorecards** | [Launchpads](#)

Scorecards

Search

Search

[Expand All](#) | [Collapse All](#)

Focus	Name	Owner	Preview	Update	Move	Reorder	Delete
▼	All Scorecards						
	Vision Enterprises						
	E-Business Transformation Scorecard						
	ABC Company	Ray, Ms. Amy					
	ABC Suppliers						
	Vision Gross Profit Strategy						
⊕	▶ Aerospace & Defense Scorecards						
⊕	▶ Manufacturing	Tucker, Mr. William					
⊕	▶ Communications Sector Scorecard						
⊕	▶ CPG Sector Scorecards						

You can create multiple scorecards and hierarchies of scorecards to represent your strategies. For example, you can create a National Sales Objectives scorecard and several Regional Sales Objectives scorecards.

Defining a hierarchy between scorecards does not create a link between the data on the scorecards. It simply indicates a logical parent-child relationship between them.

No limit exists for the number of scorecards or scorecard hierarchies that you can create. However:

- Only one parent scorecard can exist for each hierarchy.
- A scorecard cannot appear twice in the same hierarchy.

To create a scorecard:

1. Navigate to Performance Management Designer > Reporting > Scorecard Designer.
2. Click Create.
3. Enter a name and description for the scorecard.
4. Select a scorecard owner from the list of available users. Click Continue.

Only one owner can exist for each scorecard. An owner can be any Oracle Applications user with a Balanced Scorecard responsibility assigned and a defined e-mail address.

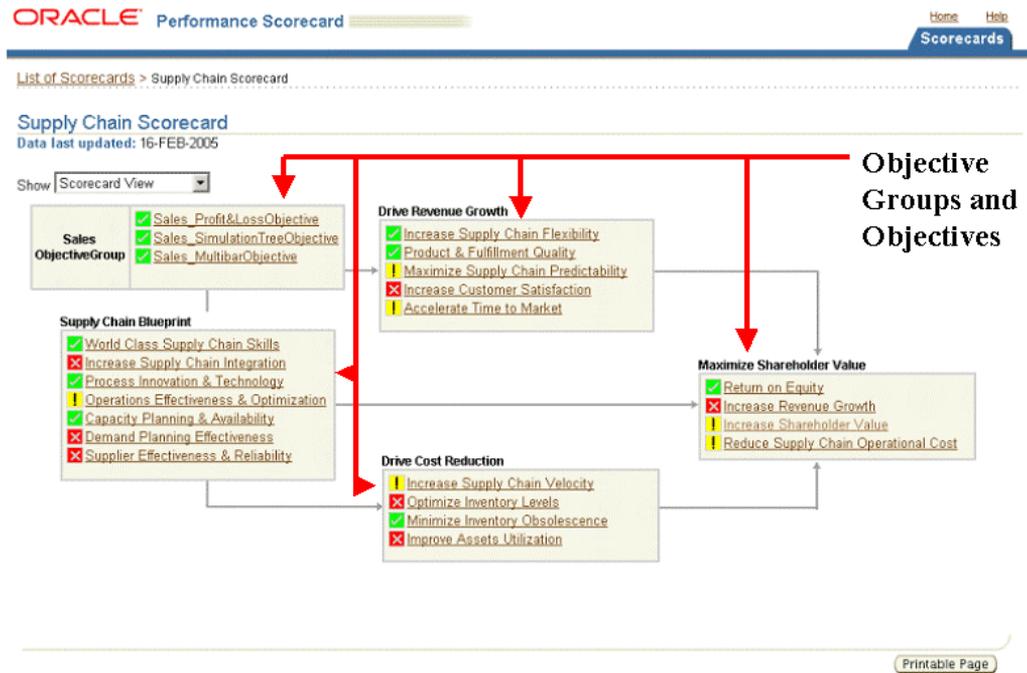
The list of available owners is not restricted to the qualified Oracle Applications users. Check with your system administrator to determine which users can be scorecard owners.

5. If you want to add the scorecard to a hierarchy, then select a parent scorecard from the list of available scorecards.

Select	Focus	Name	Owner
<input type="radio"/>		▼ Top Level	
<input type="radio"/>		Vision Enterprises	
<input type="radio"/>		E-Business Transformation Scorecard	
<input type="radio"/>		ABC Company	Ray, Ms. Amy
<input type="radio"/>		ABC Suppliers	
<input type="radio"/>		Vision Gross Profit Strategy	
<input type="radio"/>	<input type="checkbox"/>	▶ Aerospace & Defense Scorecards	
<input type="radio"/>	<input type="checkbox"/>	▶ Manufacturing	Tucker, Mr. William
<input type="radio"/>	<input type="checkbox"/>	▶ Communications Sector Scorecard	
<input type="radio"/>	<input type="checkbox"/>	▶ CPG Sector Scorecards	
<input type="radio"/>	<input type="checkbox"/>	▶ Financial Sector Scorecards	
<input type="radio"/>	<input type="checkbox"/>	▶ Functional Scorecards	
<input type="radio"/>	<input type="checkbox"/>	▶ High Tech Sector Scorecards	
<input type="radio"/>	<input type="checkbox"/>	▶ Life Sciences & Health Care Sector Scorecards	
<input type="radio"/>	<input type="checkbox"/>	▶ Management Methodologies Scorecards	

- If you do not want to add the scorecard to a hierarchy, then choose Top Level.
- Click Finish to save your work.

Add Objectives



An *objective* is a strategic statement that represents a specific goal to achieve the strategy. Examples of typical objectives are Increase Revenue, Reduce Service Calls, and Maximize Sales Growth.

Objectives are classified into Objective Groups. Objective groups are very useful to visualize groups of objectives in the scorecard views and can be used as perspectives, strategic themes, or any other classification required according to the company strategy.

You can add an unlimited number of objectives to each scorecard. When you add an objective to a scorecard, viewers can click the objective to drill down to the Objective report and view the objective details. The Objective report is described in the *Oracle Balanced Scorecard User Guide*.

Prerequisites

- Create objectives, page 3-1

To add objectives to a scorecard:

- Navigate to Reporting > Scorecards.
- Select a scorecard and click Update.

Primary Attributes **Objectives** Views

Add

Objective Name	Objective Group	KPIs	Remove
* Increase Sales	* Promote Sales of Key Products		
* Promote New Products	* Promote Sales of Key Products		
* Minimize Contract Leakage	* Optimize Procurement		
* Increase Shareholder Value	* Improve Profitability		
* Optimize Inventory Management	* Reduce Inventory Levels		

Primary Attributes **Objectives** Views Cancel Apply

3. Navigate to Objectives and click Add.
4. Select an Objective group and click Go.
5. Move the objectives that you want to add into the Selected Objectives region.

Available Objectives

Objective Group: Sales Performance Go

Gross Margin
More Competitive

Move

Move All

Remove

Remove All

Selected Objectives

Customer Returns
Total Sales

Cancel Apply

6. Click Apply to save your work.

Enable Views

Enable the views to use with the scorecard. By default, each scorecard has the Scorecard, Tree, and Detailed Views enabled. Optionally, designers create custom graphical views to replace available scorecard or strategy map views.

A complete description of the different scorecard views is available in the *Oracle Balanced Scorecard User Guide*.

To enable views:

1. Navigate to Reporting > Scorecards.
2. Select a scorecard and click Update.
3. Navigate to Views.

The screenshot shows the Oracle Performance Management Designer interface. At the top, there is a navigation bar with 'ORACLE Performance Management Designer' and links for 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this is a secondary navigation bar with 'Dashboards', 'Reports', 'Publish', 'Scorecards', and 'Launchpads'. The 'Scorecards' section is active, and the 'Update Manufacturing' scorecard is selected. The 'Views' tab is selected, showing a table of views and their configuration options.

View Name	Description	Display	Preview	Update	Delete
Detailed View	Detailed View	<input checked="" type="checkbox"/>			
Scorecard View	Scorecard View	<input checked="" type="checkbox"/>			
Strategy Map View	Strategy Map View	<input type="checkbox"/>			
Tree View	Tree View	<input checked="" type="checkbox"/>			

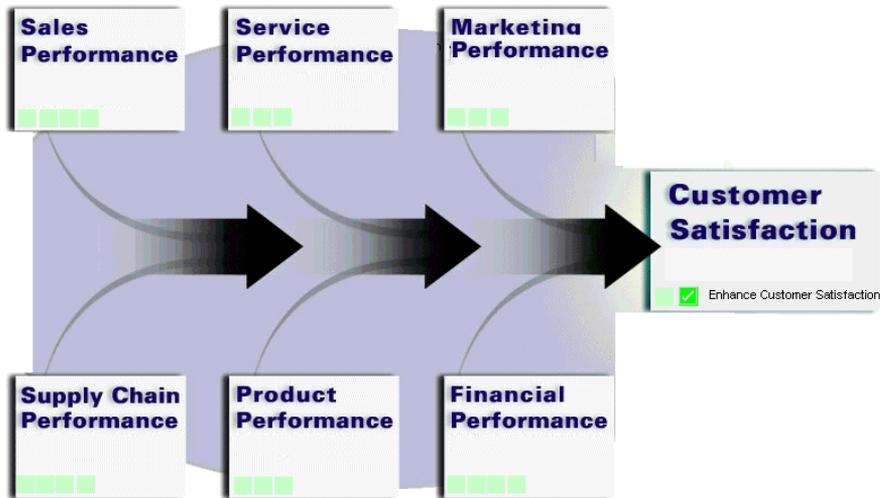
4. To disable the Scorecard View, Tree View, or Detailed View, clear the Show check box next to the view.
5. To enable the Strategy Map View, select the Show check box next to the view.
6. To add a custom view, click Create to create it.
You can create as many custom views as you want for the scorecard.
7. Set the default view for the scorecard by selecting a view from the drop-down list.
Tip: Select the most commonly used view as the default view.
8. Click Apply to save your work.

Related Topics

Create Custom Views, page 2-8

"Balanced Scorecard Views" in *Oracle Balanced Scorecard User Guide*

Create Custom Views



Custom views allow designers to create a graphical representation of the company strategy and import it into the application. Custom Views support multiple features including the ability to navigate across multiple related views and drill down to more detailed information for a particular scorecard. You can create and enable multiple custom views for each scorecard.

Unlike other views, Custom views enable you to:

- Include a background image. Designers can create the background image in a graphics application. GIF, JPG, SWF, and SVG files are supported.

Note: All custom views are accessible in Balanced Scorecard Architect. However, for custom views using a swf type image, the background is not visible in Balanced Scorecard Architect.

- Select which objectives to display.
- Select which existing KPIs you display.
- Link to other custom views or Oracle applications form functions.
- Include launchpads that link to other content, such as presentations or URLs.

When you create a custom view, make sure to:

- Load the background image *before* you add any objects to the view.
- Place all objects within the boundaries of the background image. Objects that fall outside of the image boundaries will not be visible to viewers.

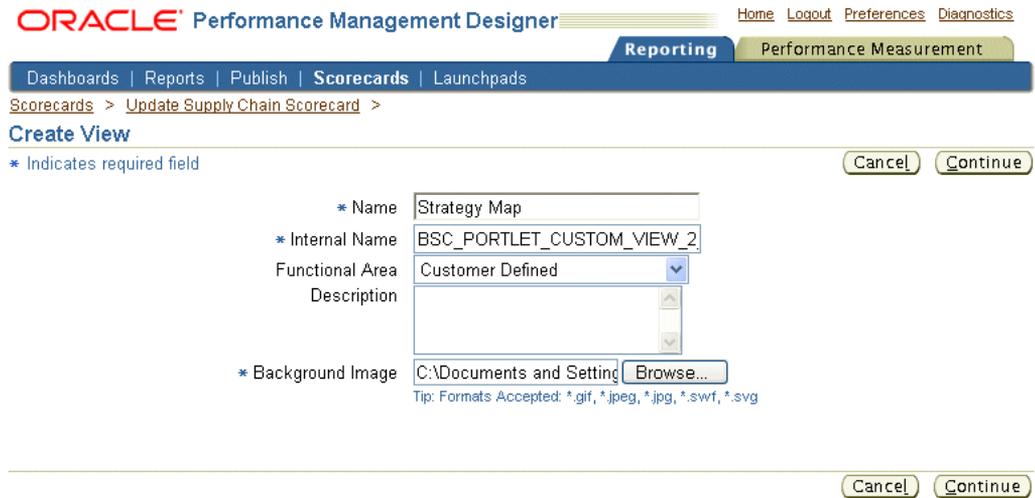
Preview custom views and test any launchpads before you move the scorecard into production mode.

Prerequisites

- Create launchpads (optional), page 2-11

To create a custom view:

1. Navigate to Scorecard > Views.
2. Click Create View.

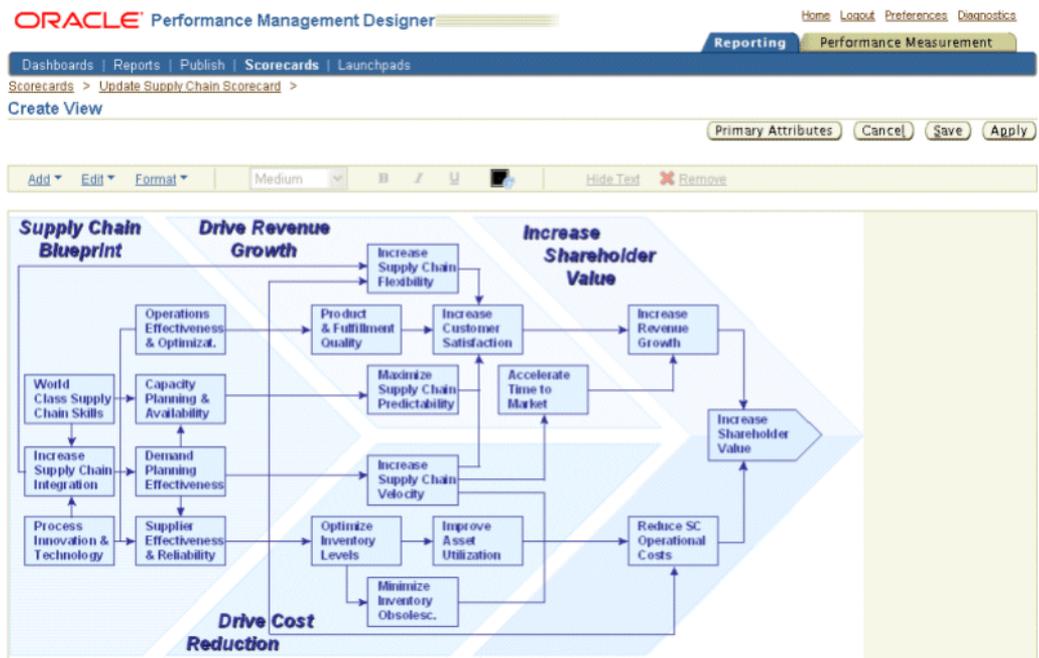


3. Enter a name for the view.

The internal name for the view appears by default. You can update it, if required. Make sure that the name is unique.

4. Select the required functional area.
5. Enter a description for the view.
6. Add a background image for the view, and click Continue.

The background image can be a GIF, JPG, SWF, or SVG file. The maximum recommended size for the image is 1 MB.



7. Add content to the view by selecting Objective, Label, Launch Pad, Custom View Link, or Existing KPI from the Add menu. Then click Go.



Objective: Add one or more objectives to the scorecard. You do not need to add all of the objectives that have been assigned to the scorecard. Instead, you can choose which objectives you add to each custom view. This enables you to create different custom views for different user groups that may have different objectives.

By default, the objective alarm and the objective label are placed on the view. Scorecard viewers can click the alarm or label to drill down to the objective report.

To edit the objective:

- Modify the label's text and font.
- Drag and drop the alarm and label anywhere in the view.
- Create a hotspot for the objective instead of a label. Hotspots are denoted by a dashed box. If you create a hotspot, viewers can click the hotspot and drill down to the objective report. Hotspots are particularly useful if you are using a graphic that includes text as the background image for the custom view (for example, a presentation slide).

To add a hotspot, select the objective, and then select the hotspot icon. You can drag the hotspot to increase or decrease the size.

Labels: Drag and drop labels anywhere on the view. You can also modify the text and font using the toolbar.

Launch Pad: Search for available launch pads. Launch pads are sets of links that you create through the launch pad module. Once you add launch pads to the custom view, you can drag and drop them anywhere on the view.

Custom View Link: Add links to other custom views. You can drag and drop the links anywhere on the view and modify the text and font using the toolbar.

Existing KPI: Add existing KPIs to custom views. You can search existing KPIs based on Functional Area and add them anywhere on the view. Typically the KPIs have an associated actual and change value that you can also drag and drop to any position on the background image.

By default, KPI label and a container for the actual value of the KPI are placed on the view. Scorecard viewers can click the label or value to drill down to the KPI report.

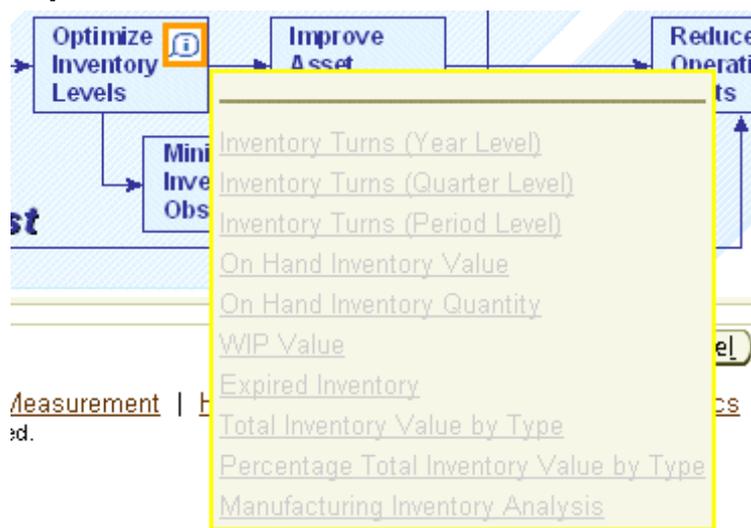
To edit the KPIs:

- Drag and drop the label and value anywhere in the view.
- Edit the general properties to associate a report with the KPI.

- Edit the display properties to create a hotspot for the KPI instead of a label, and to display or hide the change and actual values of the KPI.
8. You can also update the primary attributes of the view by clicking Primary Attributes.
 9. Click Apply to save your custom view.

Note: The toolbar menus in the scorecard custom view interface shows enabled or disabled options depending on the selected object. Also, the behavior of the icons for fonts and colors may change from enabled to disabled if the menu selection does not apply.

Create Launchpads



A *launchpad* is a group of links to other information sources, such as presentations, documents, web sites. You can add launchpads to custom views.

Launchpads appear as lowercase "i" icons. Click the icon to view the links in the launchpad.

Launchpads contain URLs or links to any Oracle Application form function, such as a report or workbook.

To create a launchpad:

1. Navigate to Reporting > Launchpads.
2. Click Create Launchpad.
3. Enter a name and description for the launchpad.

[Launchpads](#) >

Create Launchpad

* Indicates required field Cancel Apply

* Name
 Description

Name	Description	Move Down	Move Up	Update	Delete
No data exists.					

Cancel Apply

4. To add a link to a URL, click Add URL. Enter a display name and the complete URL.
5. To add a link to an Oracle Applications form function, click Add Application Pages. Choose from the list of available Oracle Applications form functions.
6. Rearrange the links in the launchpad as required.
7. Click Apply to save your work.

To secure the launchpad:

1. Log on to Oracle Applications using the System Administrator responsibility.
2. Select Security > Responsibility > Define.
3. Query the responsibility to which you want to assign the launchpad. For example, Performance Management User.
 Make a note of the menu that is attached to the responsibility.
4. Navigate to Applications > Menu.
5. Select the menu that you noted earlier for the responsibility.
6. Add the launchpad as a sub-menu.
 Leave the Prompt field empty so that the launchpad does not appear in the OA Self Service Menu for the responsibility.
7. Save your work.

Related Topics

For information about adding submenus to responsibilities, see: *Oracle Applications System Administrator Guide*.

Enable Additional Information Column

Published scorecards are displayed in the List of Scorecards window. For each scorecard, the List of Scorecards window displays the scorecard name, scorecard owner, and Details button.

Administrators can choose to enable the Additional Information column in the List of Scorecards window. This column displays any additional information that the designer has entered about the scorecard, for example, a short description.

To insert the Additional Information column in the List of Scorecards window, use the System Administrator responsibility to set the BSC: Scorecard Information Enabled profile option to Yes. Set this profile option at the site level.

Related Topics

For information about setting profile options, see *Oracle Applications System Administrator Guide*.

Add Logos

You can import a company logo or image to appear at the top of every scorecard.

To add a logo to scorecards:

1. In BSC Builder, right-click a Balanced Scorecard system.
2. From the menu, select System Images.
3. Click Browse and select a logo.

The image can be a GIF or JPG file. The optimal size for the image is 340 x 100.

4. Click OK to save your changes.

Set Up Alarms if Performance is Above 100%

You can trigger alarms that are Acceptable, Below Plan even if performance is above 100%. You cannot express the percentage of performance as greater than 100% when the method is Acceptable Below Plan.

To set up alarms if performance is above 100%:

1. In BSC Builder, right-click a Balanced Scorecard system.
2. From the menu, select Define Performance Calculation.
3. Select a color method.
4. Enable the Over 100% option.
5. Click OK to save your work.

Set Up Pie Chart

You can specify the number of slices to display in a pie chart at the system level.

Viewers can further limit the number of slices to display at a user level.

To specify the number of pie chart slices to display:

1. In BSC Builder, right-click a Balanced Scorecard system.
2. From the menu, select Define Default Graph options.
3. Choose one of the following graph options:

- **All:** Displays all the slices in the pie chart.
 - **Slices:** Defines the maximum number of slices that are displayed in the pie chart. Enter the maximum number of slices in the field.
4. Click OK to save your work.

Related Topics

Oracle Balanced Scorecard User Guide

Configuring the Scorecard View

The Scorecard View is the default view that appears the first time you open the BSC Architect > Performance Management Designer. You can assign another view as the default view later.

The Scorecard View represents the Groups of Objectives that belong to a Scorecard. The Group name created in the BSC Builder is represented in this view.

Initially, the different groups are located randomly in the view. The Performance Management Designer lets you move groups in two ways. You can enable Drag Drop Mode and manually relocate the group to an approximate location on the scorecard. To move the group to a precise location, use the editing window to specify the coordinates.

To move a group panel:

1. Right-click inside the main window area of the scorecard or strategy map main view.
2. From the pop-up menu, choose Enable Drag Drop Mode.
3. Click inside the area of a group panel.
4. Hold down the left mouse button and drag the group panel to the desired location.
5. Repeat steps 3 and 4 for each group.
6. Fine tune the placement of the panels by using the group editing window to specify a panel's precise coordinates on the window.
7. Choose the Save button to save your changes.

To specify the precise location of a panel:

1. Right-click in the area of the group panel. Be careful not to click near a objective since this will display the objective's window instead
2. From the pop-up menu that appears, choose Edit Group Position to display an editing window.
3. Use the scroll bars beside the Top and Left options to incrementally adjust the placement of the panel on the window.
4. Use the scroll bars beside the Height and Width options to incrementally adjust the size of the group panel.
5. Choose the Save button to save your changes.

Formatting Directional Lines

Directional lines can be used to show the relationships between groups of objectives.

To create and edit lines:

1. Right-click in the area outside of the group panels.
2. When the pop-up menu appears, choose Add a Line.
3. From the sub-menu, choose Vertical Line or Horizontal Line. A new line appears on the screen.
4. Right-click directly on the line to display a pop-up menu.
5. Choose Edit Line Properties to display an editing box.
6. Use the scroll bars beside the Top and Left options to incrementally adjust the position of the line on the window.
7. Use the scroll bars beside the Height and Width options to incrementally adjust the size of the line.
8. Add an arrow to the line by choosing the Arrow Up or Down radio button. Remove an existing arrow by clicking None (the default).
9. Choose the Save button to save your changes.

Defining Other Scorecard Properties in Architect

This section describes how to define other scorecard properties in BSC Architect.

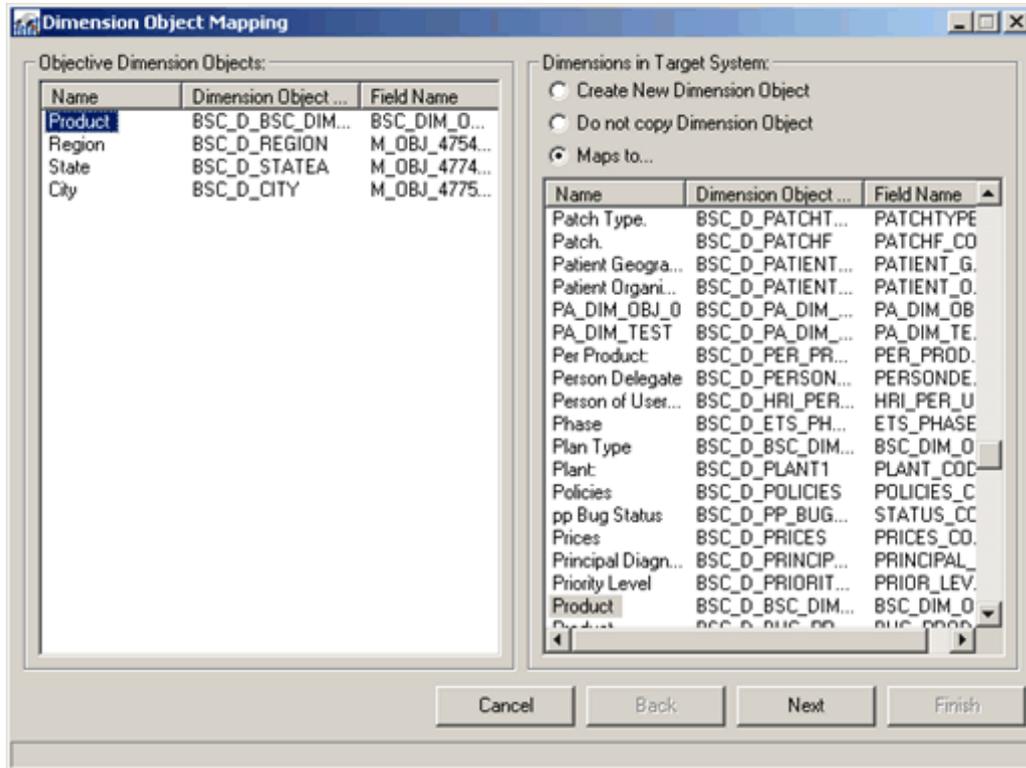
Copying and Moving Objectives within a Objective Group - Architect:

Copy and move objectives within an Objective Group using BSC Architect.

You may copy an objective from one group to another in the Builder. This functionality is only available in BSC Architect - Builder.

1. Choose the objective to highlight it.
2. Drag the objective to the new group you wish to put it under (the new group's name will be highlighted).
3. Select Copy Objective from the pop-up menu.
4. Map entities that exist on the objective you just copied to the various entities defined in the BSC system. These entities include dimensions, dimension objects, and data definitions (measures). If an entity cannot be mapped, a new entity can be created in the BSC system, or you may use the default options.
5. To help you map dimension objects, the Builder will display the Dimension objects Mapping window.

Dimension Objects Mapping Window



- The right panel of this window shows the dimension objects defined in the objective you are copying. The left side shows all dimension objects defined in the system. Map each of the dimension objects used in the original objective to an existing dimension object in the target system.

Note: If you are copying an objective within the same system, then all dimensions will already exist and will be mapped automatically.

- To map a dimension object used in an objective, highlight the dimension object you wish to map on the left panel, and then highlight the system dimension object on the right side that it maps to.
Continue with each dimension object until all have been mapped. While doing this, make sure the Maps to... radio button is selected.
- If the objective dimension object you have highlighted does not map to a current system dimension object, then you may create a brand new system dimension object.
Select the Create New Dimension Object when mapping each dimension object. The Builder will ask you for the name of the new dimension later in the mapping process, and will create it.
- You may also decide not to copy a dimension object used in the objective. In this case, when the dimension object that you do not want copied is highlighted, make sure you select the Do Not Copy Dimension Object radio button.
- After you have selected all the dimension object mappings, choose Next.

11. You will next have to map Dimension, Data Definitions (also known as measures), and Periods. Follow the same procedure as in steps 7-9.
12. Click on Apply and wait until the objective is copied.

Note: If the user copies an objective using a calendar that does not exist in the target system, then you must map it to an existing calendar or create the calendar before copying the objective.

Moving Objectives

You can move objectives using BSC Architect > Builder. Moving Objectives is similar to the Copying Objectives procedure.

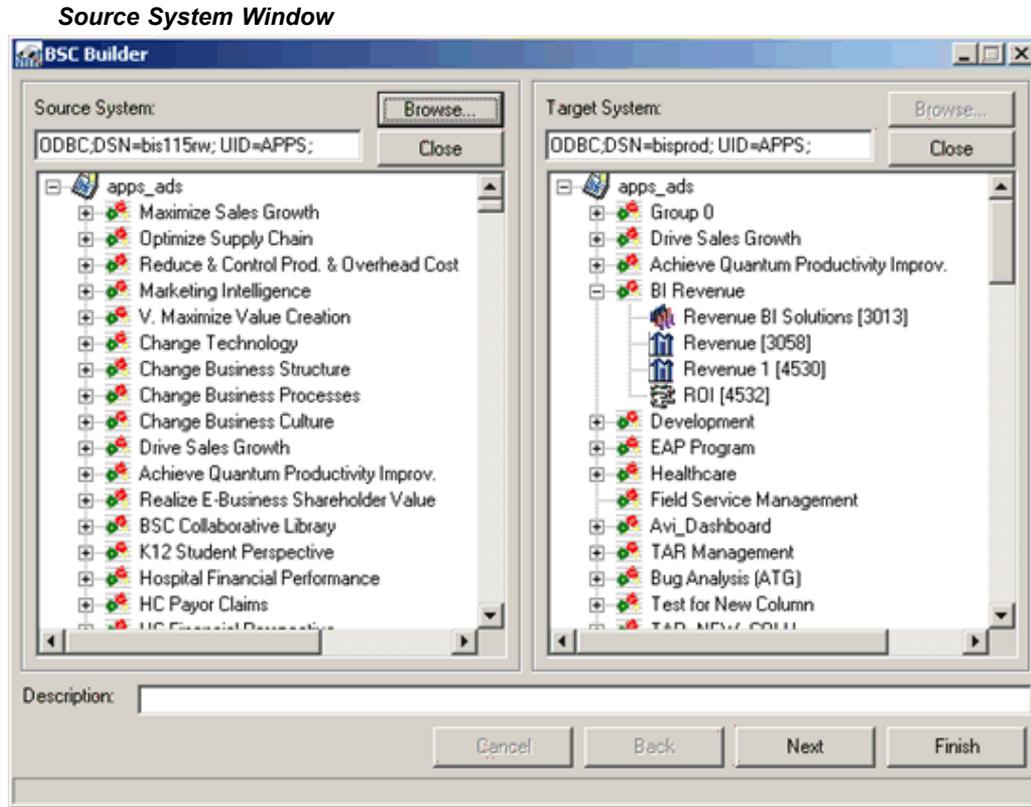
Follow steps 1 and 2 in the procedure, but when the pop-up menu comes up, select Move Objective. The objective is moved to the new group. No mappings are required.

Copying Objectives from a Source System using Architect

You can copy objectives from a source system using BSC Architect. If you plan to copy objectives from a source system, then you must install and identify a source scorecard or system. This functionality is useful to move a specific set of objectives from one instance or system to another. Copying the objective will copy the configuration of the objective but not related data.

You can open several different sources. Locate the first source and copy the required objectives. Then, locate the second source and copy those objectives. Continue loading sources and copying elements, until you have copied all the required objectives.

1. Open the BSC Architect > Builder main window.



Note: The Oracle Applications environment allows only one schema per scorecard, therefore have your source or library systems in a separate Oracle Applications instance.

2. In the Source System panel, choose the Browse button. If source libraries or scorecards are installed, then an Open Project window appears.
3. Select a system or library, then enter the user name and password for the source system. The hierarchy of the selected source appears in the Source System panel.
4. In the Source System panel, highlight with the left mouse button the objective to copy.
5. Drag the objective from the Source panel to the group in the Target System panel.

Defining Common Dimensions (List Button) at Scorecard Level

The common dimensions or list button functionality allows you to evaluate the performance of all the Objectives associated to a scorecard for every dimension object enabled.

For example, you can evaluate the performance of all the objectives associated to the ABC company scorecard by industry, account, goal and objective. You can secure and filter the scorecard data that users have the responsibility to access.

When activated, the List button appears at the top of the Scorecard Page in the Performance Scorecard module.

List Button



When configured, the List will appear in View by option in the Viewer for all of the main views that are defined, including Scorecard View, Strategy Map View, and others. The List button is used to filter the main panel of a scorecard by different dimension values. For example, the alarm boxes for a corporate balanced scorecard have industry, account, goal and objective.

Using the List button, a user views the same balanced scorecard, but for a specific industry. If account is one of the available dimension objects, then only the accounts that belong to the selected industry are evaluated to obtain the performance of that industry.

Users choose the List button to see all of the valid dimensions by which their balanced scorecard can be viewed.

The user chooses any possible combination of dimensions and dimension values, being restricted only by the relevant parent-child relationships. For example, the user cannot an account that does not belong to the Life Science Industry, because the system automatically allows the user to only pick the valid children values, depending on the parent value selected.

Using the Performance Management Administrator > Security module, a user could also be limited to a certain set of dimension values. For example, if a user is a Life Science Industry manager, they could be restricted to seeing only data related to this industry. In this was the case, the user's list button would be deactivated.

Additional flexibility can be achieved with the List button. If the user is the Life Science Industry manager, for example, they would have the Industry dimension locked. However, they would be able to select any other account, goal and objective when choosing the List button.

Additional List Button Functionality

It is important to understand that dimensions become available to the List button only when they are common to *every* objective on the scorecard. If dimensions are not common to every objective on a scorecard, then you can filter using the Filter button.

For example, the Industry dimension object must exist on every objective in the scorecard in order to become available to the List button. In our example, all four dimensions (Industry, Account, Goal, Objective) exist on every objective on the scorecard. Accordingly, they are available as List button dimensions.

List button dimensions are identical to objective dimensions. When a specific dimension value is selected using the List button, and then the user enters a objective, that objective will display only the data for the selected dimensions. For example, if the user does not choose any List button dimension objects, when they go into the objective, then they will have all four dimensions List buttons available to use

Objective, No List Button Dimensions Selected

List of Scorecards > Account Status > Account Status

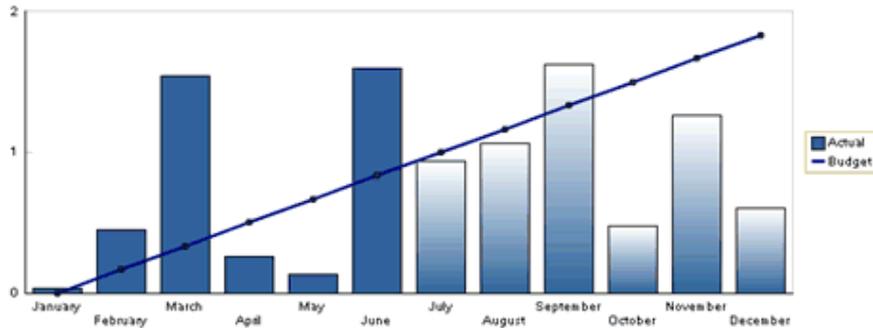
Account Status (Prototype Mode)

Data last updated: 12-APR-2006

View by Industry: All Account (Sales): All Goals: All Objectives: All

Industry: All Account (Sales): All Goals: All Objectives: All

Account Status - 2006



Last Update Period: June, 2006

Account Status - Actual: 2 Budget: 1 Variation: 1 Percent: 191.28%

However, if using the List button a user wishes to see the Life Sciences Industry, then they will not have this dimension object available when they return to the objective.

List Button Dimensions Selected

List of Scorecards > Account Status > Account Status

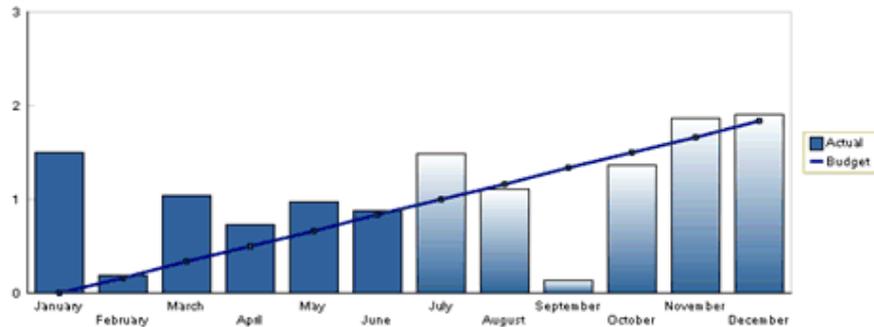
Account Status (Prototype Mode)

Data last updated: 12-APR-2006

View by Account (Sales): All Goals: All Objectives: All

Industry: Life Sciences Account (Sales): All Goals: All Objectives: All

Account Status - 2006



Last Update Period: June, 2006

Account Status - Actual: 1 Budget: 1 Variation: 0 Percent: 105.25%

For more information, see *Oracle Balanced Scorecard User Guide*.

Setting Up the List Button:

Use the Objective Designer and the Architect -Builder to set up the List button. Follow steps 1-2 in the Objective Designer and steps 3-6 in the Builder.

1. Add dimensions to Objectives.

Ensure that the dimensions that you wish to add to the list button exist on every objective on the scorecard. The dimensions must be in the same order (from left-to-right) on every objective. To ensure this, you may want to group List button dimensions in a common Dimension Group and Dimension Set in the Dimension definition window, and assign the group as a whole to objectives.

Dimension objects with COMPARISON as their default value cannot be included in the list.

- List button dimensions must be related through parent-child relationships. Independent dimensions cannot be part of a List button configuration.

For example Region, State, and City have a parent-child relationship and can therefore be part of a List button configuration. But Customer Type is an independent dimension from the three geography dimensions (any customer type can be in any region, city, or state); therefore Customer Type cannot be in the List button configuration.

However, Customer Type by itself could be a List button dimension object. Ensure that the selected dimension objects have been defined with the proper parent-child relationships in Define Dimension Relationships in the Dimension Designer.

Dimension Relationships Window

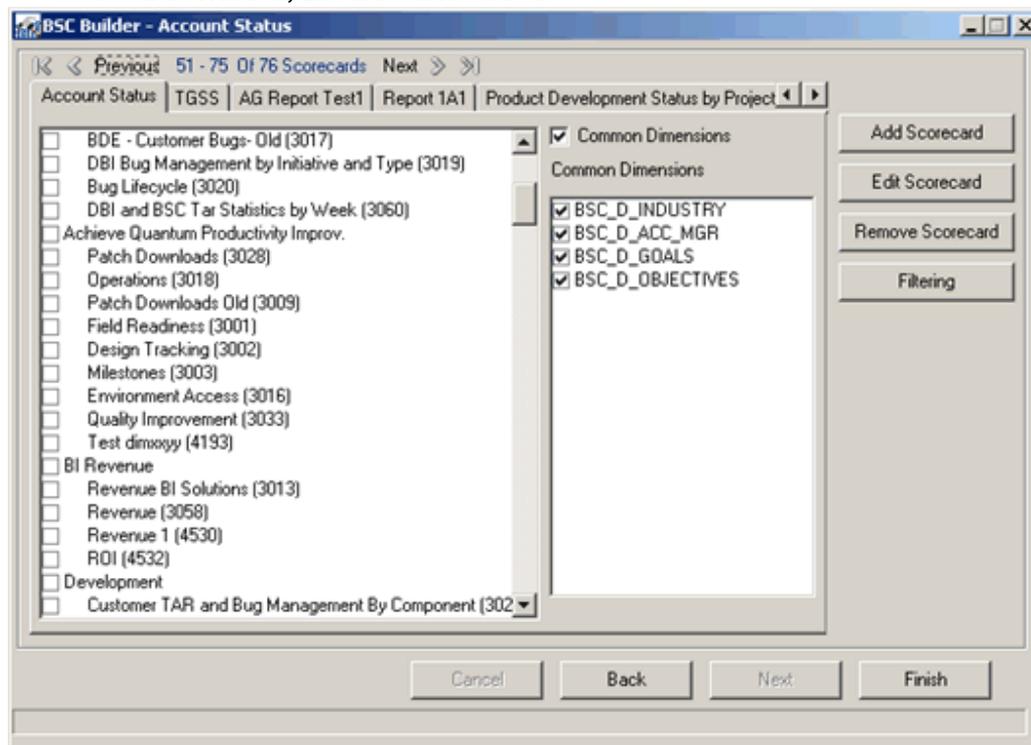
Name	Parents	Children	Created By	Last Updated	Update
Account (Sales)	Industry	Goals	PPERDOMO	13-Apr-2006 13:44:58	
Industry		Account (Sales)	PPERDOMO	13-Apr-2006 13:44:58	
Goals	Account (Sales)	Objectives	PPERDOMO	13-Apr-2006 13:44:44	
Objectives	Goals		PPERDOMO	13-Apr-2006 13:44:44	
State	Region	City	PPERDOMO	13-Apr-2006 10:38:10	
Region		State	PPERDOMO	13-Apr-2006 10:38:07	
City	State		PPERDOMO	13-Apr-2006 10:38:07	

- After you have added dimension objects to objectives and defined the relationship between dimension objects, uses the Builder and go to the second window, where scorecards can be defined and objectives selected for each scorecard. Choose the check box for the List button, on the right side of the window.
- When you choose this check box you will see activated the possible dimensions that are available to the List button.

These dimensions are displayed using the following criteria:

- A dimension must exist on all objectives on the scorecard
- A dimension must be in a proper parent-child relationship
- A dimension must always be assigned to a objective in the same order, left-to-right, as the other dimensions

Scorecards Window, List Button Activated



Note: The dimension objects are described by their dimension object table name, and not by their given name.

5. Select the dimension object to see in the List button configuration using the check box. You cannot select a child dimension without selecting the parent first.
6. Follow this procedure for all scorecards that need the List button to be set up.

Restrictions

Restrictions for the List Button

- For dimension objects to be available to the List button, they must be defined as a parent-child relationship.
- An independent dimension object cannot be part of List button dimension objects, unless it is the only dimension object available.

The Parent dimension object in a parent-child dimension object must be one of the List button dimension objects.

- Parent-child relationships must be one-to-many, not many-to-many. For example a state-city relationship is one-to-many, because a state can have many cities, and any one city belongs to just one state. However, a state-products relationship is many-to-many because a product can be sold in many states, and a state can have many products.
- Any dimension object used in the List button cannot be configured as a default COMPARISON dimension object in the objective.

The user can manually select COMPARISON for that dimension, but the KPI cannot have that dimension as a default view (when the user first goes in). The KPI Designer will disable the List button if COMPARISON is selected on a dimension.

- List button dimensions must be common to all objectives, and they have to be in the same exact order on all objectives. For example, if Region, State, City are the common dimensions, then they must be in this order on all KPIs in order to be available for the List button.
- List button relationships can only be defined from left-to-right on the objective. For example: Region > State > City, but not Region > City > State.

Defining Dimension Filters for a Scorecard

The Filtering button lets you define which dimension values to see in each scorecard. The filter applied over a dimension in a scorecard affects all objectives using that dimension in that scorecard.

Use this feature to show only a set of data for a particular dimension within a scorecard. For instance, on the Southwest Division scorecard, you may wish to display only the regions, products, or other business dimensions belonging to the Southwest Division.

Filters allow users to define different sets of dimension values for all objectives that belong to a scorecard. Typically, different scorecards representing different organizational units have different sets of products or geographies associated with them.

An example of filtering by the product dimension is when the Corporate scorecard shows all products, but the Brewery Division scorecard shows only products relevant to its associated division (such as light beers), while the Soft Drink Division scorecard only shows soft drink products.

Difference Between List Button and Filter By Scorecard

The List button and filter by scorecard features are similar but not identical. For instance, you can only filter one value with the List button, but using filter by scorecard, you can select multiple values per dimension.

In addition, the restrictions that apply to the List button definition (the need for a common dimension across all objectives in a scorecard) do not apply to the filter by scorecard feature functionality. Filter by scorecard can be applied to all objectives using a selected dimension even if other objectives do not share this dimension.

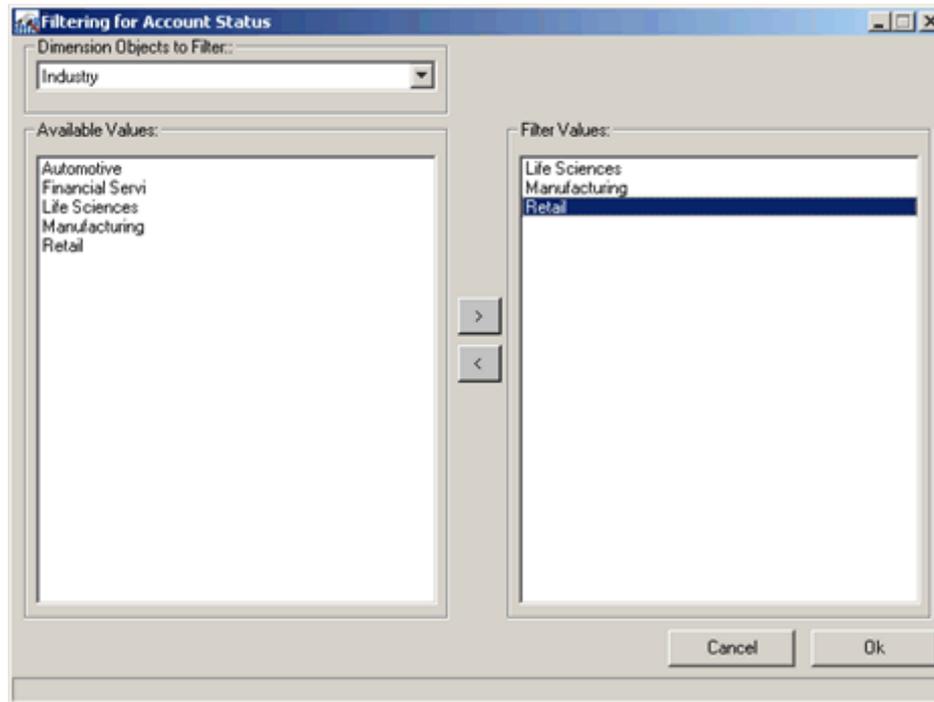
Note: Generally, filtering a dimension by scorecard overrides the List button values. For example, if you are already filtering by region (a dimension common to all objectives in a specific scorecard), and a List by Region is defined, then Objective Designer will display only data associated with the region being filtered.

To filter dimensions by scorecard, you will need Objective Designer, Data Loader and BSC Builder. Complete step 1 and 7 in Objective Designer, step 2 in Metadata Optimizer and steps 3-6 in BSC Builder.

1. Define all objectives, dimension objects, and dimension relationships using Performance Management Designer.

2. Use Performance Management Administrator > Data Loader to populate the dimension tables
3. Relaunch BSC Architect > Builder and navigate to the main scorecards window. Select the scorecard by which you want to filter.
4. Choose the Filtering button. A dialog box appears:

Figure Filtering Window for Industry Scorecard



5. Select a dimension from the list of values to show the list of Available Values for that dimension.
6. Select values by choosing the value, then choosing the right-arrow button. The selected value appears in the Filtered Values frame. Deselect values by choosing a value in the Filtered Values box, then choosing the left-arrow button. Select all values by choosing the double-right-arrow button, or deselect all values at once by choosing the double-left-arrow button. When you have chosen your values, choose OK.
7. Exit BSC Architect > Builder and launch Viewer. Select the scorecard by which you chose to filter, and choose the objective to which the filter was applied.

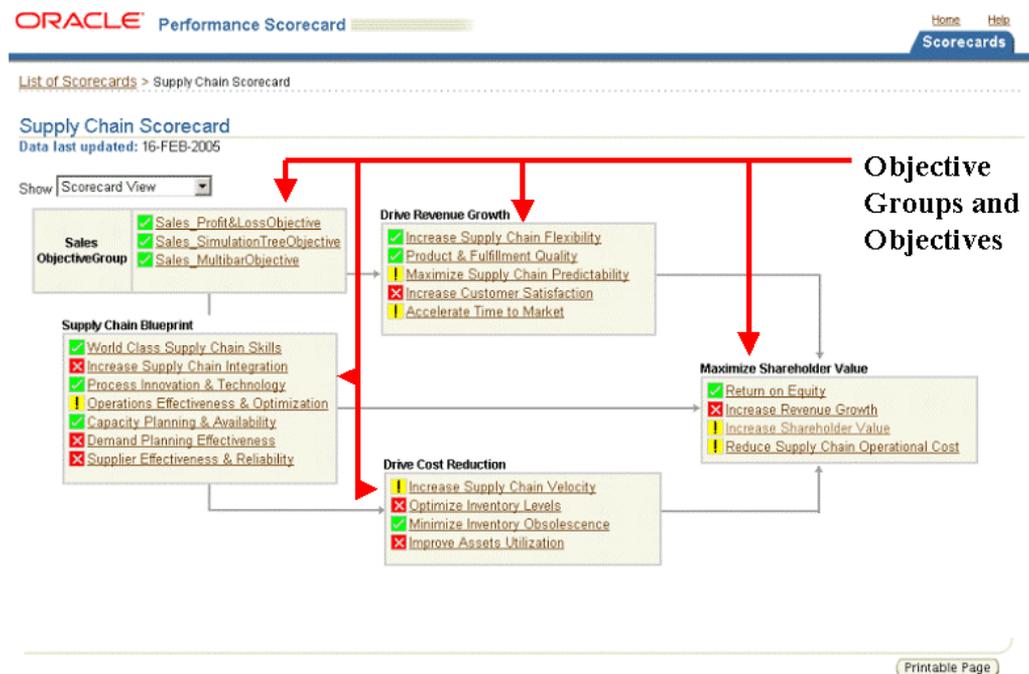
The Objective shows only the data associated with the field by which you filtered. For instance, if you selected Industry as a filtered value, then the objective would only show dimension values for the particular industry associated with that scorecard.

Objectives

This chapter covers the following topics:

- Overview of Creating Objectives
- Create Objectives
- Create Dimensions
- Create Custom Calendars and Periods
- Create Dashboards and Reports
- Defining Other Objective Properties - Architect

Overview of Creating Objectives



Objectives represent the strategic themes, corporate goals, perspectives, or simple organizational categories used in scorecards. Objectives are used to measure performance in scorecards.

Each objective is a collection of related KPIs and dimensions. KPIs are the basic units used to calculate performance. If an objective contains multiple KPIs, the default KPI is used to determine the objective alarm status. Dimensions represent the different levels of aggregation for each KPI.

When you create an objective you are really defining the contents of the Objective report. The Objective report, enables you to view the details of the KPIs and dimensions used to calculate the objective status.

Before you can create an objective, create the KPIs and dimensions that you want to add to the objective.

You can create single bar or multiple bar objectives. You can also create simulation trees and profit and loss indicator to provide different views of the KPIs in the objective. If you have Daily Business Intelligence implemented you can also review the preseeded KPIs, which are available for use in Balanced Scorecard.

If you have several related, single bar objectives, you can create *data source groups* which enable you to use the same underlying table for the related KPIs.

You can create dimensions that to allow you to filter the KPI data. For example, you can create a dimension that includes each of your sales groups and sales regions. If you have Daily Business Intelligence implemented you can also review the preseeded dimensions, which are available for use in Balanced Scorecard.

The following are all the objective-related procedures that the designer or administrator can perform.

1. Create Objectives, page 3-2
2. Create KPIs, page 3-3
3. Create Single Bar KPIs, page 3-4
4. Create Data Source Groups, page 3-8
5. Create Profit and Loss, page 3-9
6. Create Dimensions, page 3-14

Related Topics

"Objective Report" in *Oracle Balanced Scorecard User Guide*

Create Objectives

You can create a hierarchy of three levels to organize the content of your scorecards. The three levels are objective groups, objectives, and KPIs.

Create objective groups with your main themes or categories. Objectives are classified under objective groups. Objective groups allow designers to create an additional level, category, functional group or theme that group several objectives. Each objective belongs to an objective group.

Create objectives to organize the KPIs that you want to use to measure performance. Then, assign KPIs to the objective. Once you've assigned the KPIs, you can define the attributes of the objective by specifying which KPI is the default KPI for the objective. The default objective drives the alarm color for the objective.

After you update the objective, you can define the attributes for each KPI. You can change the display name of KPIs and assigning dimensions. Each KPI can be assigned a different set of dimensions.

The combination of objectives, KPIs, and dimensions that you define is the basis for the Objective report that viewers use to monitor performance.

For example, if you want to increase leadership in your enterprise, you could set up objectives as shown in the figure above. In that example, the Leadership objective group contains two objectives: Organizational Leadership and Public Responsibility. If you drill into the Organizational Leadership objective, you see that it contains two KPIs: Score and Point Value.

When you define objectives, ensure that you start by defining the KPIs and dimensions that you will use in the objective.

Create KPIs

KPIs (also known as measures) are used to calculate the performance of an objective.

You can create four different types of objectives:

- **Single Bar:** Single bar KPIs display a single data series. Use single bar KPIs to show a historical trend compared to one or more benchmarks. For example, you can use a single bar KPI to represent actual revenue against forecasted or planned revenue.
- **Multiple Bar:** Displays multiple data series, or measures, across time. Use multiple bar KPIs to break data into subcomponents. For example, if you want to view Customer Deposits by account types, such as Checking, Savings, and CDs.
- **Simulation Tree:** Displays "what-if" scenarios. A simulation tree allows you to simulate the impact of changes to KPIs and define leading and lagging KPIs. For example, if you increase the Number of Orders Shipped on Time, will it increase Customer Satisfaction Ratings?
- **Profit and Loss:** Displays which accounts contribute to profits and which accounts contribute to losses.

For the purpose of this guide, any type of KPI that you create in Balanced Scorecard will be referred to as a *custom KPI*.

When you create a single bar KPI you must associate it with a data source. The data source is the table or view column that provides the data for the KPI. Different KPIs can use the same data source. Multiple series KPIs, are unique because they have multiple data sources, but those sources are displayed in the same graph.

The following is a list of the KPI-related procedures.

Create Single Bar KPIs

Create Multiple Bar Objectives

Create Simulation Tree Objectives

Create Profit and Loss

Create Single Bar KPIs

Single bar KPIs display a single data series. Use single bar KPIs to show a historical trend compared to one or more benchmarks. For example, you can use a single bar KPI to represent actual revenue against forecasted or planned revenue.

Create KPIs (measures):

1. Log into Oracle Applications using the Performance Management Designer responsibility.
2. Navigate to Performance Measures > Measures.
3. Click Create. The Primary Attributes page appears.

The screenshot shows the Oracle Performance Management Designer interface. At the top, there is a navigation bar with 'ORACLE Performance Management Designer' and links for 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this is a secondary navigation bar with 'Reporting' and 'Performance Measurement'. The main content area is titled 'Measures | Dimensions | Objectives' and 'Measures >'. A sidebar on the left contains 'Primary Attributes', 'Additional Attributes', 'Formulas', and 'Data Source'. The main form is titled 'Create Measure: Primary Attributes' and includes a 'Cancel' button, 'Step 1 of 4', 'Next', and 'Finish' buttons. The form fields are: '* Name' (Measure 1), '* Internal Name' (PMD_34948), '* Application' (Progress Custom), 'Functional Area' (Customer Defined), and 'Description' (empty). A 'Generated Source' checkbox is checked. A second set of 'Cancel', 'Step 1 of 4', 'Next', and 'Finish' buttons is located at the bottom of the form.

Primary Attributes

4. Enter a display name.
5. Change the internal name field, if required. The internal name must be unique.
6. Chose an application.

It is recommended that you create a custom application and use it for this purpose. Using a custom application ensures that your custom content is preserved when you upgrade to a later version of Balanced Scorecard.

7. Enter a description as required.

Click Next to proceed. The Additional Attributes page appears.

Measures | Dimensions | Objectives

Measures >

Create Measure: Additional Attributes

* Indicates required field Cancel Back Step 2 of 4 Next Finish

Measure Type

Activities / Balance
 Aggregation Method
 Forecast Method

Prototyping

Random Data Style
 Random values for Actual * From * To
 Random values for Plan * From * To

Format

Numeric Format
 Axis Title
 Auto scaling

Calculations

Variance To complete Cumulative Quarter To Date Data Variance
 Percent Growth Year to Date Growth Year to Year Growth
 Cumulative Year To Date Contribution Moving Average Period To Date

Cancel Back Step 2 of 4 Next Finish

Additional Attributes

8. Select a measure type:

- **Activity:** An Activity KPI is any KPI with a cumulative value. Values for Activity KPIs are added/accumulated period-by-period or for year-to-date purposes. A typical Activity KPI is Sales which is typically aggregated period by period to obtain the Year to Date value.
- **Balance:** A Balance KPI is any KPI with a value that is not cumulative. Values for these KPI are not accrued period-by-period; these measures represent the value at certain point in time. A typical Balance KPI is Total Assets. Total Assets are a snapshot at a point in time, they are not accumulated across periods.

9. Select an aggregation method:

- AVG
- AVG (Lowest Level)

The average value based on the lowest dimension level for the KPI. For example, the Geography dimension has three levels: City, State and Country. City is the lowest level.

If you choose AVG (Lowest Level), select "Apply rollup to Formula" so the KPI will be calculated for an overall aggregation only.

- MAX
- MIN
- SUM

10. Select a forecast method.

Forecast methods are used to estimate KPI performance for future periods. Forecast data is automatically calculated from the last period of actual data to the last period of the fiscal year. choose one of the following forecast methods:

- Custom
Load forecast data from a third-party application.
- Moving Average
Forecasts are based on a moving average for the past year (or less time periods if a year of data does not exist). The moving average includes actual and past forecasted data.
- No forecast
- Plan-based
Forecasts are based on the average performance to plan for the last three months and applies that ratio to the plan for each of the succeeding periods.
- 3-month average performance (no null projection)

11. Define the prototype settings.

Prototype data is automatically generated by the system for testing purposes. You can choose whether you want the prototype data to be linear or random and enter hypothetical ranges of values for your actual and plan data.

12. Define the numeric format.

13. Define the axis title.

When you define the title, consider the following:

- Y-axis label does not apply to pie charts and simulation trees. In Simulation Trees, the Y-axis is always the node.
- The Y-axis label for a comparison graph always displays the dimension name that is being compared.
- In Multiseries graphs, the Y-axis label applies if no more than 2 series are displayed (1 label per axis). If more than 2 series are displayed, the label does not appear.
- Y-axis labels are disabled when calculations are enabled.
- The X-axis label is always Time.

14. Enable the Autoscaling check box if you want to autoscale the KPI. If you do not enable Autoscaling, the scaling will start at zero. If the data values are close to each other, the difference between an autoscaled and non-autoscaled number is almost imperceptible.

Note: When all data is negative, the scale will adjust to the maximum value.

15. Select the calculation methods that you want to make available for the KPI. Depending on the type of KPI you are defining, you can define a formula or cause and effect.

Calculation methods are described in *Oracle Balanced Scorecard User Guide*.

Click Next to proceed. The Formulas page appears.

Formula

16. Choose a formula for the KPI. If you select an aggregation method, such as AVG, the aggregation method will impact the formula.

- **Apply aggregation method to the each element of the formula.**

In this option, the results are calculated for each dimension object and then the formula is applied to the results.

- **Apply aggregation method to the overall formula.**

In this option, the formula is applied to the rolled up total.

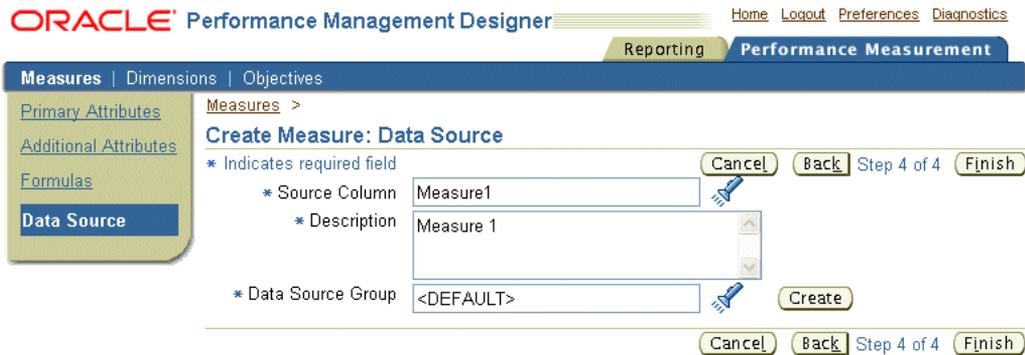
- **Formulas between two calculated measures**

In this option, each KPI could have a different roll-up/aggregation method.

17. If you select "Formulas between two calculated measures", use the formula editor to combine two or more calculated KPIs. You can select from any existing columns or KPIs.

18. Click Validate to ensure that the formula you created is valid.

19. Click Next to proceed. The Data Source page appears.



Data Source

20. Source column. Every KPI or measure in the system is associated with a source column (data source). The system will generate automatically the source column name (data source) based on the display name.

Note: Please have the following considerations in mind when trying to modify the default Source Column for the measure:

- The source column name is automatically generated by the system based on the display name of the measure.
- The source column name is not editable. You can either change the source column for the measure selecting a different one or change the display name to change the source column name.
- Source columns are created only when a measure is created. You cannot create source columns independent from measures. There is always a logical flow requires the measure creation as the base for source column creation.

21. Enter a description for the source column.

22. Select a Data Source Group or create a new one.

When a measure is created, the measure is always assigned to a *Default* data source group.

Creating Data Source Groups:

Create a Data Source Group to group measures or KPIs related in nature and coming from specific data sources within the organization. The data source groups are used to make easier the data loading and administration processes, when you are creating large scorecards with many objectives and measures assigned to them.

The generate database process will use the data source groups to create the minimal number of interface tables required to support your objectives and scorecards, grouping the KPIs that share the same dimension objects and periods. The data source groups helps you to automate the data loading process avoiding complex merge, consolidation, and validation operations when the source data for your KPIs come from different sources, such as transactional systems and databases, or owners such as departments and users.

This feature can help in two ways:

- Create tables for related measures.

- Reduce number of tables created for related measures/KPIs.

To create source groups for measures

1. During the measure creation process, go to the Data Source step, and click Create in front of the Data Source Group field.
2. Enter a name for the new source group.
3. Click OK to return to the measure data source screen.

The new group is assigned for the measure.

Note: If you want to assign additional measures/KPIs to the same data source group to indicate that those are related, edit the corresponding measure and assign the corresponding data source group.

Create Profit and Loss

Profit and Loss objectives display which accounts contribute to profits and which accounts contribute to losses. A Profit and Loss objective template is provided with Balanced Scorecard. To create a Profit and Loss objective, create a copy the template and modify the copy as required.

Important: Do not delete the template. You will not be able to create new Profit and Loss objectives if you delete it.

You can configure Profit and Loss objectives using BSC Architect. The default Profit and Loss Objective available in the system or any Profit and loss copied through BSC Builder module, will be represented in the Performance Management Designer Hierarchy as a single line that represents the objective, the child measure for this type of objective is always Amount by default.

These types of Objectives are not available from the creation menu, but they can be copied to be used and configured in different Objective Groups and Scorecards by using the Copy or Move functionality available in BSC Architect- BSC Builder.

The Profit and Loss objective has a special set of properties that designers cannot modify:

- The objective is created with a default Amount analysis option assigned to a Amount measure. You can in theory change the measure selection of the Amount default measure in Performance Management Designer when you update the Amount measure, however this is not advisable since the nature of the objective may change doing that.
- The objective is created with three dimension objects by default: Account, Account Type and Sub account. These Dimension Objects are grouped into Dimensions with the same nature. Both the Dimensions and the Dimension Objects cannot be updated and deleted from the system. Then, Icons for Update and Delete are disabled for Measures and Dimensions reserved for Profit and Loss objectives.
- The default measure Amount cannot be deleted from the objective since this is the only measure applicable for the objective. The Creation of new measures in the objective is disabled, since Amount is the only measure that can be represented in this type of objectives due to the nature of the Objective.

Note: Be sure you do not delete the Profit and Loss objective that comes installed in BSC Architect- BSC Builder as part of the original template, since once deleted is not available anymore for the system.

Special Note About Profit and Loss Objectives

While the overall structure of the Profit and Loss objective is fixed, any number of user-defined accounts can be shown in the objective. The graph consists of floating bars representing user-defined revenue and expenses accounts. Revenue accounts start from the top and are displayed in green bars, while expense accounts start below the last revenue account and are displayed in yellow bars. The bottom most bar displays the total difference between revenues and expenses.

The available calculations include Variation (from target), Parent, cumulative YTD, and Vertical Analysis. Vertical Analysis shows the percent contribution of each account to the main account, which is the first, topmost account.

Previewing Objectives

After creating an objective, the default objective is created with a default KPI (option 0) and a default Dimension Set, both empty. The functionality of Preview is available even at this moment of creation as long as the objective is assigned to at least one Scorecard.

The Preview of the objective will reflect all the changes in configuration done to the Master Objective either through Performance Management Designer > Objective Designer or through BSC Architect > Performance Management Designer.

Notice that the Preview button is disabled for objectives not assigned to Scorecards yet. This preview functionality is only available in Performance Management Designer.

Prerequisites

- Create KPIs, page 3-3
- Create Dimensions, page 3-14

To create an objective group and objective:

1. Navigate to Performance Measurement > Objectives.
2. At the top level of the objective hierarchy, click Add Child.
3. Enter a name and description for the objective group.
4. Click Apply to save your work.
5. To add an objective to the objective group, select the objective group and click Add Child.
6. Enter a name and description for the objective.
7. Click Apply to save your work.

Note: If you need to create objectives as Multiple Bar, Simulation Trees, or Profit and Loss, use BSC Builder. Once the indicators have been created, designers can return to Performance Management Designer. You can then add content to single and multiple bar KPIs in the KPI available in the Performance Management Designer tool.

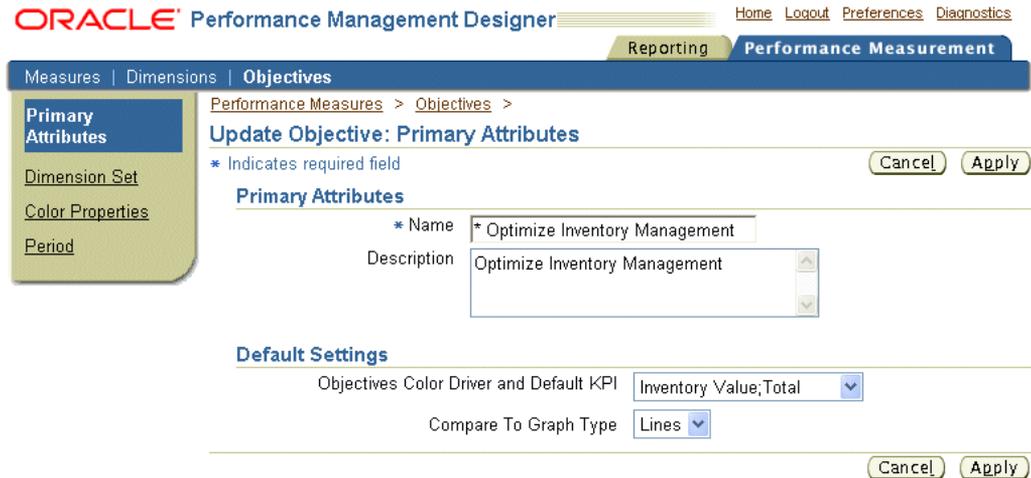
To add KPIs to an objective:

1. Select the objective and click Add Child.
2. Select the KPI and click Continue.

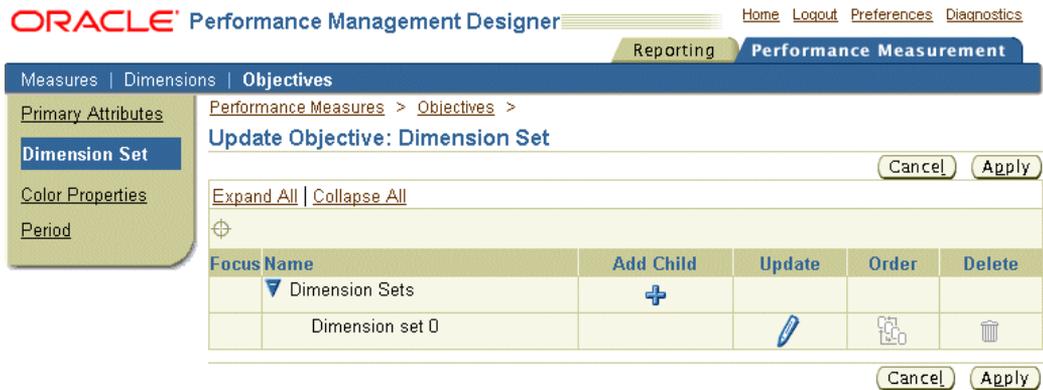
3. Change the display name of the KPI or add a description if required.
4. Click Finish to save your work.

To define the attributes of an objective:

1. Select the objective and click Update.



2. Select the default KPI for the Objective. The default KPI drives the alarm color for the objective. You can also modify the other primary attributes as required.
3. Select the default comparison graph for the objective. You can choose Lines or Bars.
4. Navigate to Define Dimension Sets. By default all objectives have one dimension set, "Dimension set 0", included.



5. To add additional dimension sets, click Add Child.
6. To add dimensions to a dimension set, select the dimension set and click Update.

Update Dimension set 0

* Indicates required field Cancel Apply

General Properties

* Display Name

Dimensions

Search

Search

Previous 1-10 Next 10

Select All | Select None

Select Dimension	Dimension Objects	
<input type="checkbox"/>	Group Acct	Account
<input type="checkbox"/>	Group Sub Acct	Sub-Account
<input type="checkbox"/>	Group Acct Type	Account Type
<input type="checkbox"/>	Dgrp Brand	Brand
<input type="checkbox"/>	Dgrp Product Li	Product Line
<input type="checkbox"/>	Dgrp Prices	Prices
<input type="checkbox"/>	Dgrp Geographic	Geographic Area
<input type="checkbox"/>	Dgrp Distributi	Distribution Channel
<input type="checkbox"/>	Dgrp Profitabil	Profitability Ranges

- Select the dimensions that you want to add to the dimension set. You can add maximum 20 dimension objects with a maximum of 14 dependent dimension objects.
- Navigate to Color Properties.

Update Objective: Color Properties

Cancel Apply

- Primary Attributes
- Dimension Set
- Color Properties**
- Period

KPI Settings

KPI	KPI ID	Color Method (Default)	Color Method
Inventory Value;Total	HT_INVT_TOT	Within	Target met within ranges
Inventory Value;On Hand	HT_INVT_OH	Above	Target met above plan
Inventory Value;In Transit	HT_INVT_IT	Within	Target met within ranges
Inventory Value;WIP	HT_INVT_WIP	Above	Target met above plan

Default KPI: **Inventory Value;Total**

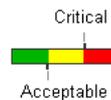
Comparison Setting

Color Thresholds

Target Met Above Plan

Acceptable Threshold

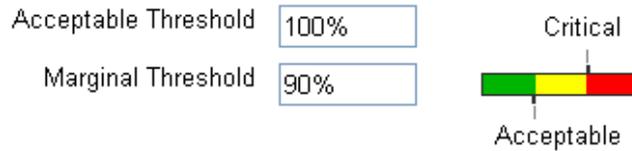
Marginal Threshold



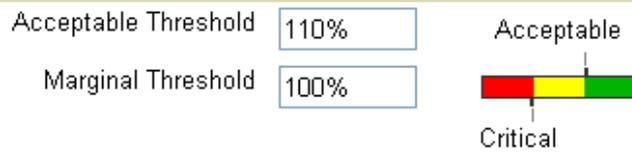
9. For each KPI, choose a method for determining the alarm color for that KPI. The available methods are:
 - Target met above plan
 - Target met below plan
 - Target met within ranges
10. Define the color thresholds for each color method.

Color Thresholds

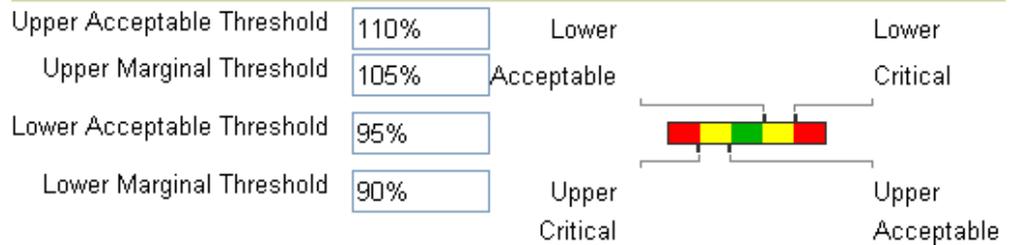
Target Met Above Plan



Target Met Below Plan



Target Within Range



Define the color thresholds as follows:

- **Acceptable Threshold** indicates that performance must be above that threshold to be "green".
- **Marginal Threshold** indicates that performance must be below the threshold to be "red".

Anything that falls between the specified thresholds is considered at risk, or "yellow".

For any KPI that uses the "Target met within ranges" method, you can define acceptable and marginal thresholds on either side of the range.

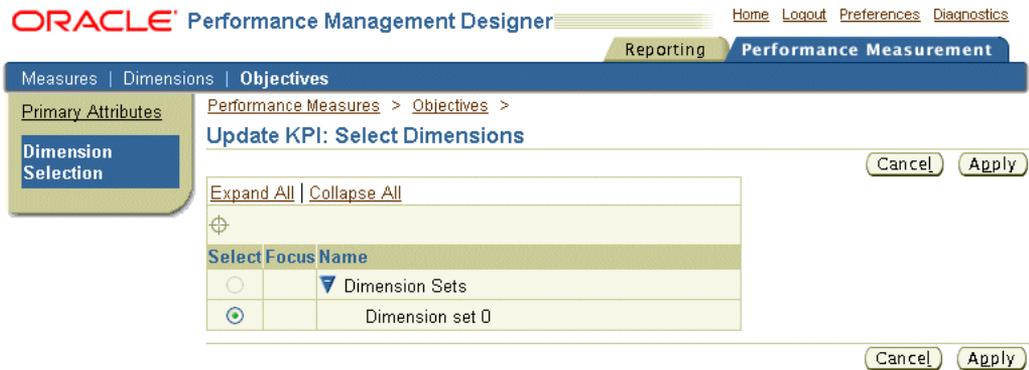
11. Define a color for prototype data as required. The default color is Acceptable.
12. Click Apply to save your work.

To define the attributes of each KPI:

1. Select the KPI and click Update.



2. Define the primary attributes of the KPI as required. For example, you can change the Display Name of the KPI to suit the objective by changing Revenue to Service Revenue.
3. Select a dimension set for the KPI. Each KPI can be assigned a different dimension set.



4. Click Apply to save your work.

Create Dimensions

Dimensions allow you to filter data for an objective or KPI. Each dimension contains several *dimension objects*. For example, Country can be a dimension and each country is a different dimension object. You can create a hierarchy of dimension objects by defining the parent-child relationships between the objects.

You can assign the same dimension to multiple KPIs. You can add or remove Dimension Objects by updating the Dimension instead of each KPI.

To create dimensions:

1. Log into Oracle Applications using the Performance Management Designer responsibility.
2. Navigate to Performance Measurement > Dimension Designer.

Reporting Performance Measurement

Measures | Dimensions | Objectives

Dimension

- Dimension Objects
- Dimension Object Relationships
- Calendars

Dimensions

Search

Name

[Expand All](#) | [Collapse All](#)

+

Focus Name	Update	Delete
▶ Dimensions		

3. Click Create.

ORACLE Performance Management Designer [Home](#) [Logout](#) [Preferences](#) [Diagnostics](#)

Reporting Performance Measurement

Measures | Dimensions | Objectives

Dimensions >

Create Dimension

* Indicates required field

* Name

* Internal Name

* Application 

Description

Dimension Objects

Available Dimension Objects		Selected Dimension Objects
<input type="text"/> <input type="button" value="Go"/>	<input type="button" value="Move"/> <input type="button" value="Move All"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/>	<input type="text"/>

- Enter a Display Name. A unique internal name is assigned to the dimension.
- Enter a Description.
- If there are existing dimension objects, you can add dimension objects to the dimension.

Note: The list of dimensions includes the pre-seeded dimensions for the E-BI measures. You cannot update pre-seeded dimensions.

7. Click Apply to save your work.

To create dimension objects:

1. Click Dimension Objects.

ORACLE Performance Management Designer

Home Logout Preferences Diagnostics

Reporting Performance Measurement

Measures | Dimensions | Objectives

Dimension Objects

Search

Name Go

Create Previous 1-50 Next 50

Name	Description	Created By	Last Updated	Update	Delete
PP Women Owned	PP Women Owned	WTUCKER	02-Feb-2006 13:47:10		
PP Small Business	PP Small Business	WTUCKER	02-Feb-2006 11:24:55		
Category pp	Category pp	WTUCKER	02-Feb-2006 11:23:45		
Period Name	Period Name	WTUCKER	12-Oct-2005 16:31:28		
SOB	SOB	WTUCKER	12-Oct-2005 15:27:35		
Budget	Budget	WTUCKER	12-Oct-2005 15:05:56		

2. Click Create.

ORACLE Performance Management Designer

Home Logout Preferences Diagnostics

Reporting Performance Measurement

Measures | Dimensions | Objectives

Dimension Objects >

Create Dimension Object: Primary Attributes

* Indicates required field

Cancel Step 1 of 3 Next Finish

* Name Dimension Object 1

* Internal Name BSC_DIM_OBJ_1975

* Application Progress Custom

Description

Generated Source

Dimensions that contain Dimension Objects

Available Dimensions Selected Dimensions

Go

Move Move All Remove Remove All

Cancel Step 1 of 3 Next Finish

3. Enter a Display Name. A unique internal name is assigned to the Dimension Object.
4. Enter a Description.
5. Add this dimension object to a dimension, as required. Click Next to proceed.
6. Enter a display label for the "ALL" option for this dimension object. The default value is ALL.

7. Enter a display label for the View-By option for this dimension object. The default value is COMPARISON.
8. Enter a prefix value for prototype data. If nothing is entered it will default to an abbreviation of the display name with any blank spaces removed.
9. Choose the sort order for the dimension object. You can sort by Description or User Code.
10. Choose a sort order for Comparison data. You can sort by Descending, Ascending, or in the same order as the Dimension Object Value. Click Next to proceed.
11. Enter a source name for the dimension object. The source is the table that contains the dimension object values. If you do not enter a source name, then the source is generated automatically.
12. Enter a Source Column. If you don't enter a source column, the column name is generated automatically.
13. Enter a Maximum Code Size for the dimension object values ID. The default value is 5.
14. Enter a Maximum Name Size for the dimension object values. The default size is 15.

Note: The system will display pre-seeded Dimension Objects. These dimension objects cannot be changed or deleted.

15. Click Finish to create the dimension object.

To create dimension object relationships:

1. Click Dimension Object Relationships.

ORACLE Performance Management Designer [Home](#) [Logout](#) [Preferences](#) [Diagnostics](#)

Reporting Performance Measurement

Measures | Dimensions | Objectives

Dimension
Dimension Objects
Dimension Object Relationships
Calendars

Dimension Object Relationships

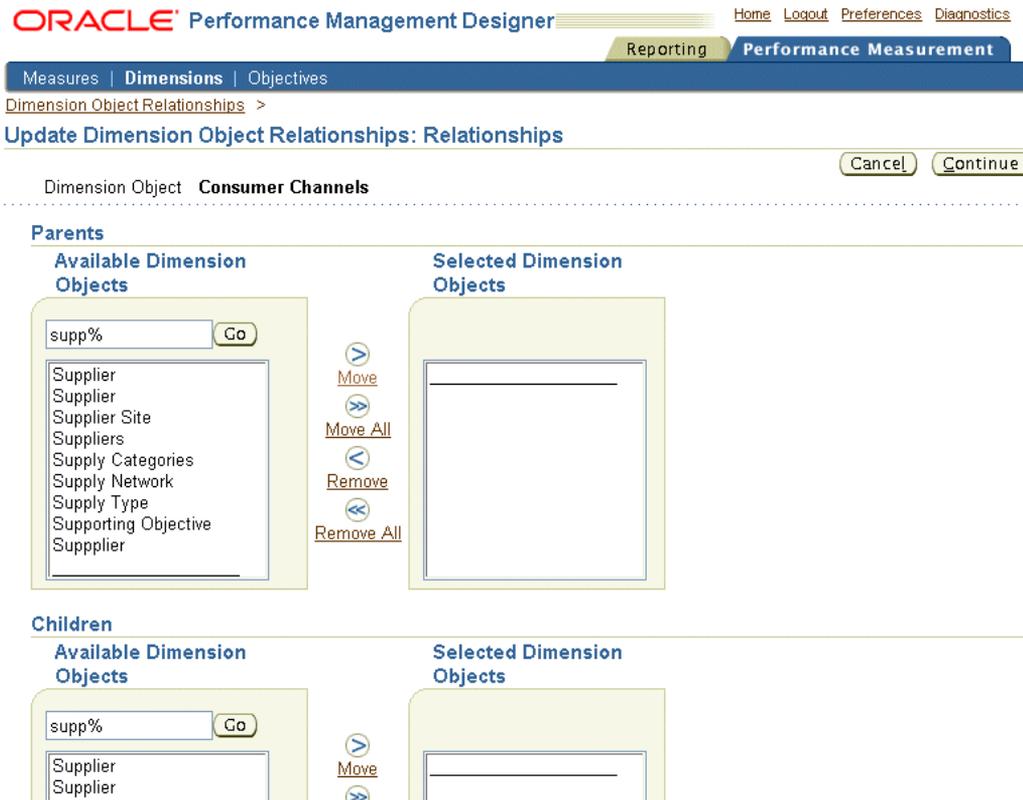
Search

Name

Previous 1-50 Next 50

Name	Parents	Children	Created By	Last Updated	Update
PP Women Owned			WTUCKER	02-Feb-2006 13:47:10	
PP Small Business			WTUCKER	02-Feb-2006 11:24:55	
Category pp			WTUCKER	02-Feb-2006 11:23:45	
Period Name			WTUCKER	12-Oct-2005 16:31:28	
SOB			WTUCKER	12-Oct-2005 15:27:35	
Budget			WTUCKER	12-Oct-2005 15:05:56	
Product_Screens			WTUCKER	06-Oct-2005 13:09:28	
SWSmallBusiness			MFG	06-Oct-2005 08:15:49	
GA Channel			WTUCKER	03-Oct-2005 14:32:00	
Dimension Object 1			WTUCKER	16-Sep-2005 16:48:03	
Dimension Object 1			WTUCKER	15-Sep-2005 16:55:16	
Customer Status			WTUCKER	14-Sep-2005 17:23:11	

2. Click Update for the required dimension object for which you want to define the relationship.
3. Query the available dimension objects to select the parent and child dimension objects.



4. Move the selected objects into the parent or child regions. Click Continue
5. Review the attributes of the relationship and verify that they are correct.
6. Click Finish to save your work.

Create Custom Calendars and Periods

Based on your requirements, you can create custom calendars and custom periods using Dimension Designer. You can also search existing custom calendars to view the details about the periods associated with the required calendar, to update the calendar, or to delete it.

To create custom calendars and periods:

1. Log into Oracle Applications using the Performance Management Designer responsibility.
2. Navigate to Performance Measurement > Dimension Designer.
3. Click Calendars.

Measures | Dimensions | Objectives

Dimension
Dimension Objects
Dimension Object Relationships
Calendars

Calendars

Search

Name

Name	Description	Created By	Last Updated	Details	Update	Delete
University Fiscal Year	University Fiscal Year	BSC	01-Jun-2005 14:34:36			
Bsc Gregorian			02-May-2005 12:40:28			
School Year	School Year	BSC	29-Jul-2003 10:21:21			
Kaudet	Kaudet	SYSADMIN	15-Aug-2002 03:15:02			

4. Click Create.

ORACLE Performance Management Designer [Home](#) [Logout](#) [Preferences](#) [Diagnostics](#)

Reporting Performance Measurement

Measures | Dimensions | Objectives

Create Calendar

* Name

* Internal Name

* Application

Description

* Current Fiscal Year

Beginning of Fiscal Year

Periods

Name	Update	Delete
Year		
Semi Year		
Quarter		
Bi-Month		
Month		
Week		
Day		

Name, Internal Name, and Application fields are populated by default. You can edit them, if required

5. Enter a description.
6. Enter Current Fiscal Year. The present year appears by default.
7. Select a month from which your fiscal year begins.
8. In the Periods section, the base periods are included in the calendar by default. You cannot update or delete these periods, however, you can build your own custom periods.

- Click Create to create a custom period.

The screenshot shows the 'Create Period' form in Oracle Performance Management Designer. The form has a header with 'ORACLE Performance Management Designer' and navigation links like 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below the header are tabs for 'Reporting' and 'Performance Measurement', and sub-tabs for 'Measures', 'Dimensions', and 'Objectives'. The main form area is titled 'Create Period' and contains several input fields:

- * Name: Period PMD_1975
- * Internal Name: PMD_1975
- * Application: Progress Custom
- Description: (empty text area)
- Base Periodicity: Month (dropdown menu)
- * Number of Periods: 1

 There is a 'Go' button below the 'Number of Periods' field. Below the 'Go' button is a table with two columns: 'Period Start' and 'End'. The table has one row with the following values:

Period Start	End
1	12

 At the bottom right of the form are 'Cancel' and 'Apply' buttons.

Name, Internal Name, and Application fields are populated by default. You can edit them, if required

- Enter a description.
- Select the base periodicity. Each custom period is based on one of the base periods. You can choose from Day, Week, Month, Bi-Month, Quarter, and Semi Year.
- Enter the number of periods that you want to create.
- Click Go. This displays the fields in which you can enter start and end data for each period to be created. The number of rows is determined based on the value you entered in the Number of Periods field.
- Click Apply, to save the new custom period and return to the Create Calendar page.
- Click Apply, to create the new calendar.

Create Dashboards and Reports

Oracle Balanced Scorecard designers have the ability to create dashboards and reports, and publish them to menus using the Dashboard Designer, Report Designer, and Publish modules. With these modules, scorecard designers can create alternative reports and add content from scorecards into Dashboards.

For information on how to create and configure dashboards and reports, and how to publish them in menus, see: *Oracle Daily Business Intelligence Implementation Guide*.

Defining Other Objective Properties - Architect

This section describes how to define other Objective properties in BSC Architect. To access the additional objective properties in the BSC Architect:

- Open BSC Architect > Performance Management Designer.
- Open the objective to be modified.

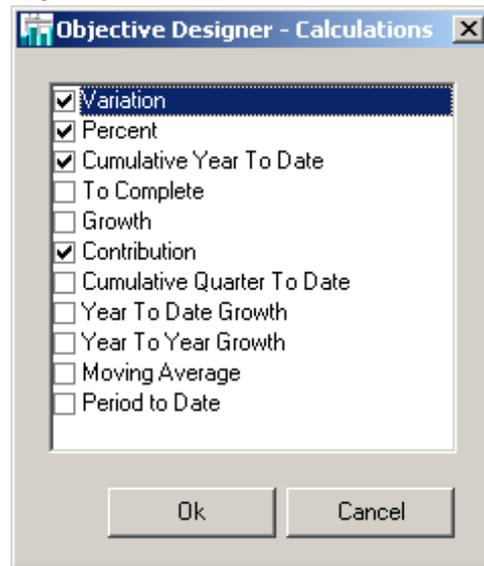
3. Right-click mouse on the empty on the right panel below the calculations. The Objective menu appears.

Defining Objective Calculations in BSC Architect

You can activate a variety of calculations for scorecard users. You can define calculations at two levels: Measure and Objective.

Use the Measure Designer to define which calculations are applicable for each measure in the objective. Also, you can use the Measure Designer to determine which calculations you want to enable for the Objective as a whole.

Objective Calculations Window in BSC Architect



Note: Individual calculations can be disabled for individual measures. See: *Define Additional Attributes*.

The available calculations are:

- **Variation:** Shows the amount that actual results vary from the benchmark.
- **Percent:** Shows the actual results as a percentage of the benchmark.
- **Cumulative YTD:** Shows accumulated results for the current year. This calculation cumulates actual data from the first day of the quarter to any point in time in the year. This allows comparing the performance of a fraction of a year to the same fraction on previous years. For instance the accumulated figure of Sales from January to May versus the same figure in the Previous year This calculation is disabled for balance KPIs or measures, such as Total Assets.
- **Cumulative QTD:** Shows cumulative results for the current year presented by Quarter. This calculation accumulates actual data from the first to the last quarter of the year. For instance the cumulated figure of Sales from Q1 to Q3 vs. the same figure in the Previous year for the same quarters. This calculation is disabled for for balance KPIs or measures

- **YTD Growth:** Compares the current period versus the last period of the prior year (final results for the prior year). For example, March 2005 is compared versus December 2004, the last fiscal month of the prior year depending on your calendar definition.
- **YTY Growth:** Calculates the growth between the current period versus the same period in the prior year.
- **To Complete:** Calculates the previous period and actual period relative to the plan. The difference between accumulated results and the targeted goal is then distributed equally over the remaining periods. This gives a picture of the challenge ahead by showing the results yet to be achieved towards the targeted plan.
- **Growth:** Shows the percentage change between the preceding period and the current period.
- **Contribution:** This calculation is only available for comparison graphs. Shows how much each data dimension element contributes to the total results for that dimension.
- **MAT:** Shows the moving average for the last twelve months. Taking the average of the last twelve months shows a smoothed trend that lets you analyze results without monthly deviations.
- **Data Variation:** This calculation is used for multiple bar objectives. The amount of variation between any two series in the same period is calculated.
- **Period to Date:** This calculation introduces the concept of As of Date reporting. Selecting Period to Date summarizes data from the first day of the period to any point in time in the same period (e.g. Sales from May 1 to May 12). With this functionality, users can compare as of date performance to the same period of the previous year (e.g. comparing sales between May 1 to May 12 of this year to those of the same period last year) or of the current year (e.g. compare the sales from May 1 to May 12 of this year to the equivalent period of time in the prior months of the current year).

Enable Calculations for an Objective

To enable calculations for the objective:

1. Right-click the objective. The objective menu appears.
2. Select Define Calculations. The Calculations window appears.
3. Enable or disable calculations as necessary.
4. Select OK to save your changes or select Cancel.

Note: Cumulative calculations such as Cumulative YTD and Cumulative QTD are not applicable or do not have an impact for Balance measures. However, the Period to Date calculation may apply if you want to obtain As of Date information for such KPI or measure.

To see the behavior of the Period to Date calculation, log into the Performance Management Viewer. The Preview design screen in BSC Architect-KPI Designer will not render the Period to Date behavior.

Users have the ability to hide or show calculations within an objective including the Period to Date calculation using a wizard. This wizard functionality for hiding calculations is available in the BSC Architect- Performance Management Designer. For more information on

how to access the wizard functionality please refer to User Wizard in the Administration Guide.

Period To Date Calculation in User Wizard Menu

Users have the ability to hide/show calculations within an objective including the Period to Date calculation using a wizard. The User Wizard functionality for hiding calculations is available in the BSC Architect- Performance Management Designer module.

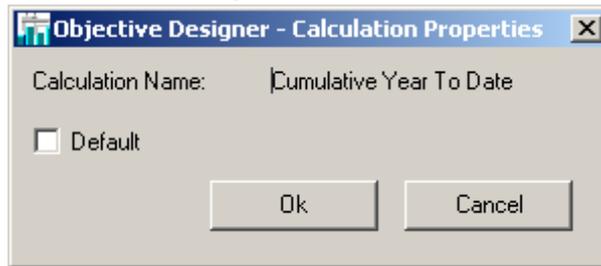
Year to Date Calculation as the Default Entry Method

The cumulative Year to Date (YTD) calculation can be set as the default entry method into the objective.

This means that when users enter the objective the cumulative YTD calculation will be automatically chosen. Selecting cumulative YTD as the default method will also cause the alarm colors on the main views to be calculated as Total YTD Actual versus Total YTD Plan.

1. You must have cumulative YTD as an active calculation already on the objective. If it is not there, add it.
2. Right-click cumulative YTD, and select Calculation Properties.

Calculation Properties



3. In the Calculation Properties window, select Default to make cumulative YTD the default entry method into this objective.
4. Select OK to save.

Note: You can only choose cumulative YTD as the default calculation. If the current data set does not have cumulative YTD as a calculation, this option is not available. For instance, for balance accounts such as total assets, cumulative YTD calculations will be disabled.

Benchmarks

Oracle Balanced Scorecard uses benchmarks to calculate the status of an objective. Two default benchmarks are included with every scorecard:

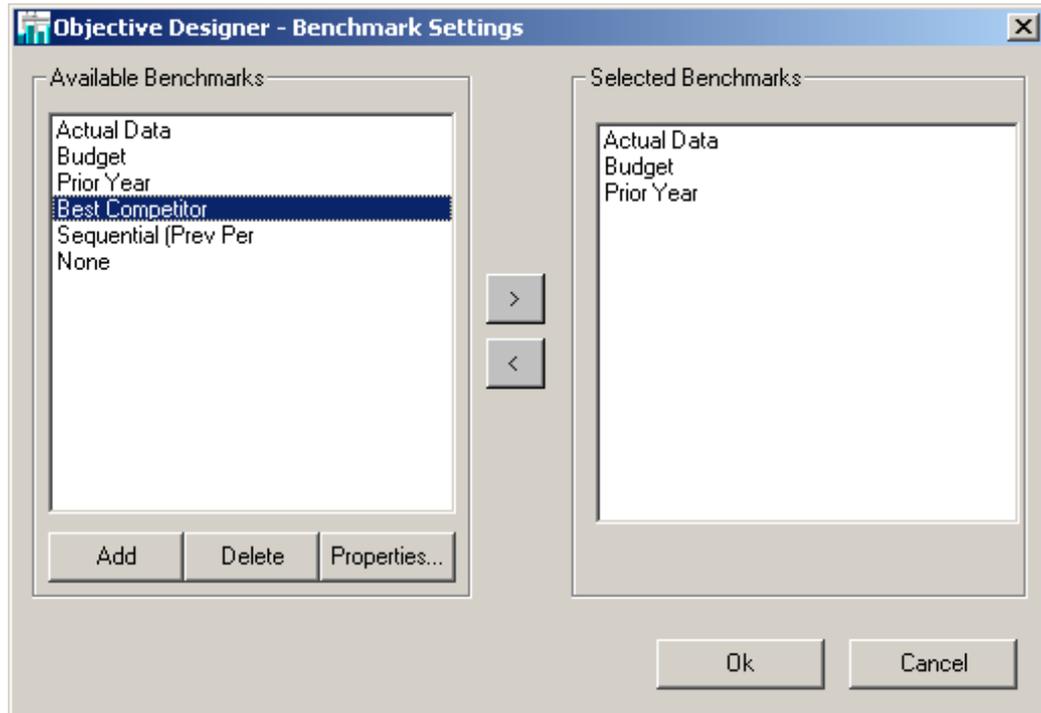
- **Budget:** The default benchmark for calculating alarm colors. It is defined as Data Type 1. This benchmark is populated with user-defined data, and can be renamed if necessary.
- **Previous Year:** Previous Year compares actual results with results from the previous year. Oracle Balanced Scorecard also lets you define custom benchmarks.

For all balanced scorecards, the objective alarm colors shown in the main window are always calculated as your actual data compared against the benchmark Data Type 1; by default, the Budget benchmark.

To define a benchmark:

1. Right-click in the area beneath the KPI group panels, to display a menu.
2. Select Define Benchmarks to display the Benchmark Settings window. The left panel shows a list of available benchmarks. The right panel shows a list of the selected benchmarks.

Benchmark Settings Window



3. To add a benchmark to the list of Available benchmarks, select Add.
4. Give the new benchmark a title by selecting Properties. The Benchmark Properties window appears.



5. In the Name field, enter a title for the benchmark. The Data type field displays a number which is automatically assigned to the benchmark. This number is used by the database.
6. Select Color to display a color palette. Select a basic or custom color for the benchmark line and select OK. The Data type field displays a number which is automatically assigned to the benchmark. This number is used by the database to specify data corresponding to this benchmark.
7. Repeat steps 2 through 5, to create additional benchmarks as required your Balanced Scorecard specification.
8. If you wish to remove a benchmark from the Available benchmarks list, select Delete. You cannot remove, Actual, Budget, or Previous Year since these are system defaults. If you try to remove Budget, the system gives you a warning since this will effect the color of the KPI's alarm box.
9. Select a benchmark to include with the current objective by highlighting a benchmark in the Available benchmarks panel and selecting the right arrow button. A copy of the benchmark is moved to the Selected benchmarks panel.
10. Continue selecting benchmarks and moving them to the Selected benchmarks panel until all the required benchmarks have been chosen.
11. If you wish to remove a benchmark from the selection list, select the left arrow button.

Cause and Effect

Scorecard users can click the Cause-Effect button in an objective window to display a Cause and Effect Matrix. This matrix shows the relationship of the current objective to the other balanced scorecard objectives. Cause Objectives are listed in the left-hand column. These are objectives that influence the status of the current objective. Effect Objectives are listed in the right-hand column. The status of the Effect objectives is influenced or effected by results for the current objective.

By analyzing the cause and effect relationships between objectives, it's possible for users to understand which variables are responsible for current results. This information is also important when devising strategies for resolving organizational problems.

When designing balanced scorecards, it's important to think carefully about the relationships between objectives. The effectiveness of the Cause-Effects Matrices as an analysis tool depends on accurate assessment and documentation of these relationships

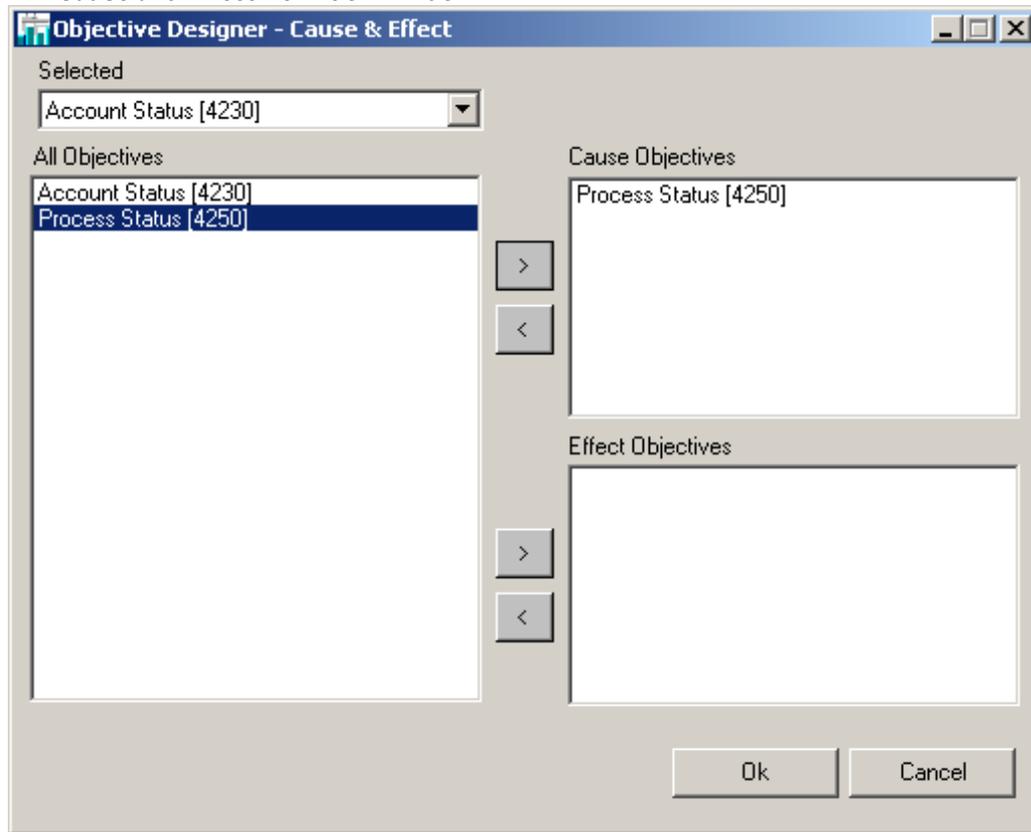
by the scorecard designer. Cause and Effect is one of the most important features in the balanced scorecard theory and to define it, a previous conceptual process needs to be developed to come up with a complete Cause and Effect scorecard model.

Note: You cannot choose an objective to be a cause or an effect of itself.

To define cause and effect relationships for an objective:

1. Right-click in the area beneath the analysis group panels, to display a menu.
2. Select Define Cause and Effect to display the Cause and Effect editing window.
3. Use the Objective Selected menu to choose an objective. The All objectives panel displays a list of all the available objectives. The Cause and Effect objective panels show lists of cause and effect objectives.
4. Move items to the Cause objective panel by highlighting an item in the All objectives panel, then clicking the right arrow button beside the Cause objectives panel. The item is now listed with the Cause objectives.

Cause and Effect Definition Window



5. To remove an item from the Cause objective panel, select the left arrow button.
6. Move items to the Effect Objective panel by highlighting an item in the All objectives panel, then clicking the right arrow button beside the Effect objectives panel. The item is now listed with the Effect Objectives.

7. When you are finished choosing cause and effect objectives, click OK to save your changes or click Cancel.

Defining Key Items for Dimension Objects in Objectives

Define Key Items allows the administrator to define a specific dimension object value to be the default dimension setting for that objective. For example, the dimension value Texas could be defined as the default for the States dimension. Defining Texas as the default for the dimension has two consequences:

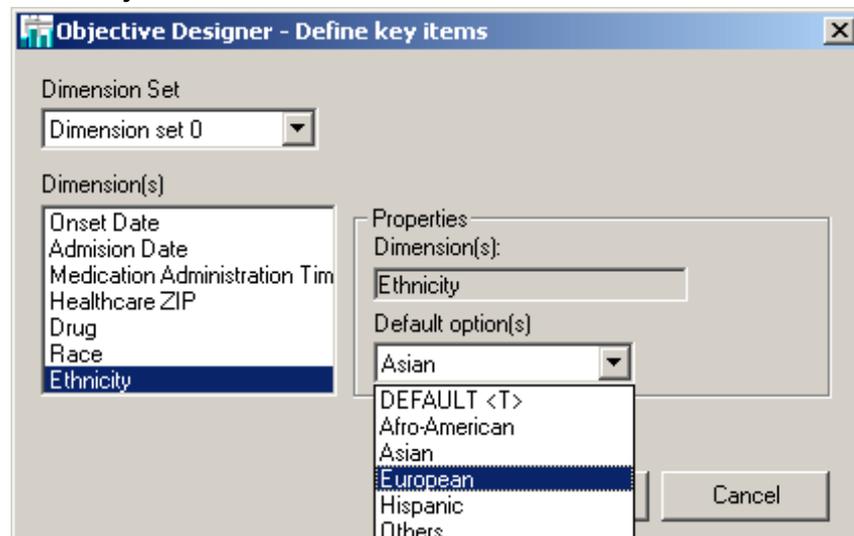
- Texas will be the dimension value that all users will always see when they enter into the objective.
- The main view alarm color will be calculated based on the actual vs. plan for Texas. For example, it could be calculated as actual versus plan for all Products, for all Delivery Types, in Texas.

This option can only be used after dimension values have been loaded into the BSC system. In addition, if a specific dimension value is chosen to be the default and no data exists for that dimension value, the objective color will be gray.

Note: The key item defined will drive the color in the objective in the main panel.

To choose a default specific dimension value:

Define Key Items Window



1. From the BSC Architect >Performance Management Designer menu, select Define Key Items.
2. If your objective has more than one dimension set assigned to it you may select the dimension set, which you want to modify using the Dimension Set menu.
3. In the Dimensions pane highlight a dimension for which you want to select a specific value.

- Using the Default Option menu, select the specific dimension value you want to make the default for the objective.
- You may select a new dimension from the Dimension pane and repeat step 4. If your objective has multiple dimension sets, you may also select a new Dimension set and repeat steps 3 and 4.
- Click OK to save your settings and exit

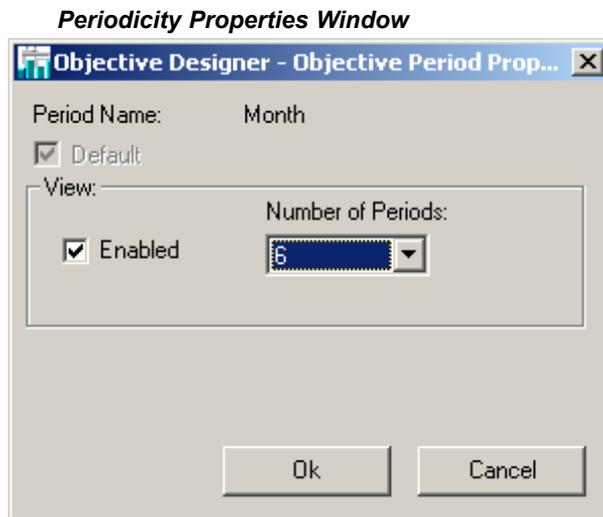
Note: Only one of the dimensions in a dimension relationship can be chosen to default to a specific value at any one time. For example, if Region is the parent of State you may choose a specific value for either Region, such as South, or State, such as Texas, but not for both.

The DEFAULT <T> or DEFAULT <C> selections in the Default option menu refer to the Default option setting defined in the Dimension.

Note: The key item defined will drive the color in the objective in the main panel.

Configuration of Period View Scroll Bar (optional)

- Set properties for each period option by clicking the option and holding down the right-mouse button to display the menu.
- Select Properties to display the Period Properties window. Use the Period Properties window to define following properties:



If you have defined Year period, you will see the following modified Period Properties window:

Periodicity Properties Window, Year Period

Objective Designer - Objective Period Prop... X

Period Name: Year

Default

View:

Enabled

Number of Periods: 4

Number of years: 10

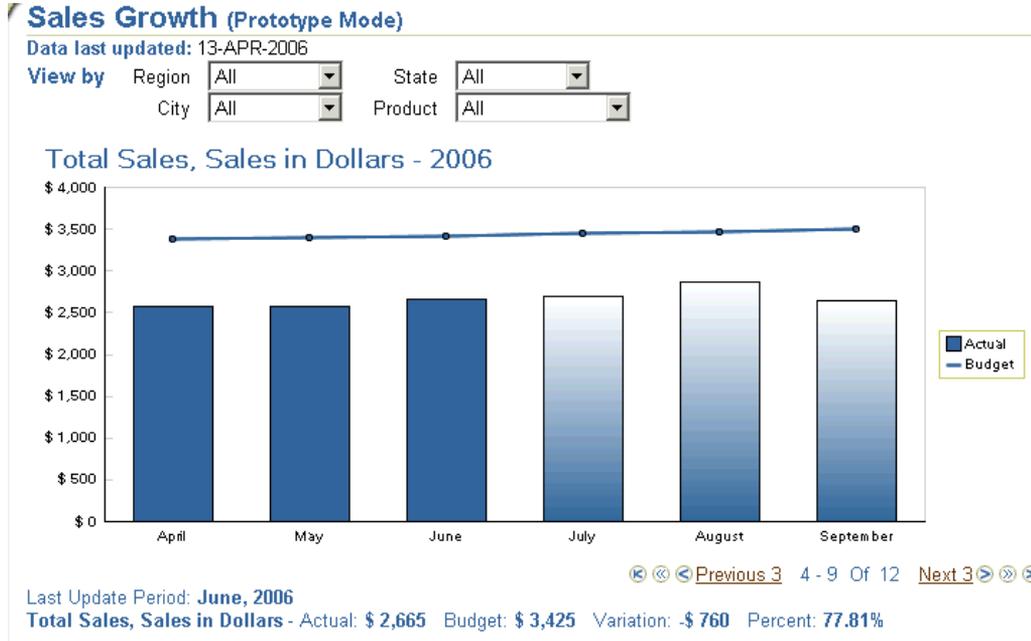
Prior Years: 5

Ok Cancel

- **Default:** Define this period as the default period for the objective.
- **Enabled:** Enable the optional period view scroll bar. When enabled, the period view scroll bar appears in objective and lets you control the number of periods that display at one time in an objective graph.
- **Number of Periods:** Number of periods visible in the graph at the same time. If you are setting properties for the period named Year, enter the following additional fields, which are needed because the Year period does not have a fixed number of periods:
 - **Number of Years:** The number of years available.
 - **Previous Years:** The number of previous years.

Example

Six Periods Defined, Period View Scroll Bar Enabled



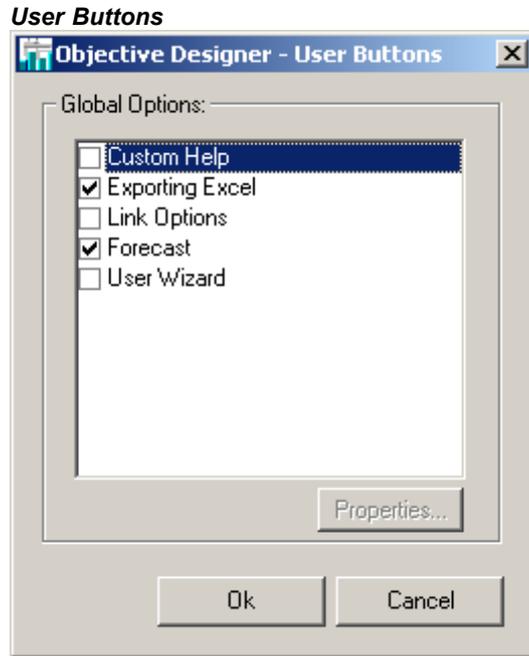
If the number of periods is defined as six for month period, then the objective graph will show six months at a time. Additional functionality at the bottom of the objective page lets you navigate to remaining months.

For more information, see: *Oracle Balanced Scorecard User Guide*.

3. Click OK to save your changes or click Cancel

Specifying User Buttons

This feature enables you to specify which user buttons will be activated for a Balanced Scorecard. Access the User Buttons panel by right clicking in the area below the analysis group panels. When the menu appears, select Specify User Buttons. The set of available buttons is as follows:



- **Exporting to Excel:** Exports data from the current objective window to an Excel spreadsheet.
- **Link Options:** Allows the user to launch a designated application.
- **Forecast:** Enables the user to turn on or off the projection bars in the objective window.
- **User Wizard:** Enables the User Wizard. This wizard allows users to customize their view of their individual scorecards.

Exporting to Excel

Activating the Export button allows the end user to export data from the current objective window to an Excel spreadsheet. At design mode the consultant or designer must decide which objectives are relevant for the end user to enable this function. The user button has to be enabled per Objective.

To enable this property, right click on the KPI designer main menu, enable the Define User Buttons option, and then use the check box next to Export to Excel to enable this option in your objective.

There is no need to set properties or path names, since the software automatically accomplishes this function.

For more information on how data is exported in the Viewer, see the *Export Data To Excel* section of the *Oracle Balanced Scorecard User Guide*.

Disabling Forecast - Architect

Activating the Projection button enables the user to temporarily turn off the forecast bars that are calculated internally by the system and display only actual data.

Note: This functionality is available for the end user in BSC Viewer only if you enable the Forecast user button in your objective. Remember this must be enabled or disabled per Objective, it is not a global property.

User Wizard

The User Wizard is the tool that allows configuration of shared objectives. You can use this wizard to hide or show options previously defined in a master objective. See: *Configuring Master and Shared objectives - BSC Architect*. Select User Wizard in the User Buttons window to enable this feature.

To configure objectives with the User Wizard:

1. Enter the scorecard containing the objectives whose analysis KPI groups and KPIs you want to configure.
2. Enable the User Wizard by right-clicking and selecting Define User Buttons. On the User Buttons screen, select User Wizard to enable the button. When you exit this screen, you should see the User Wizard button. Click the button to launch the wizard.
3. Click Next to show the Analysis Group window.

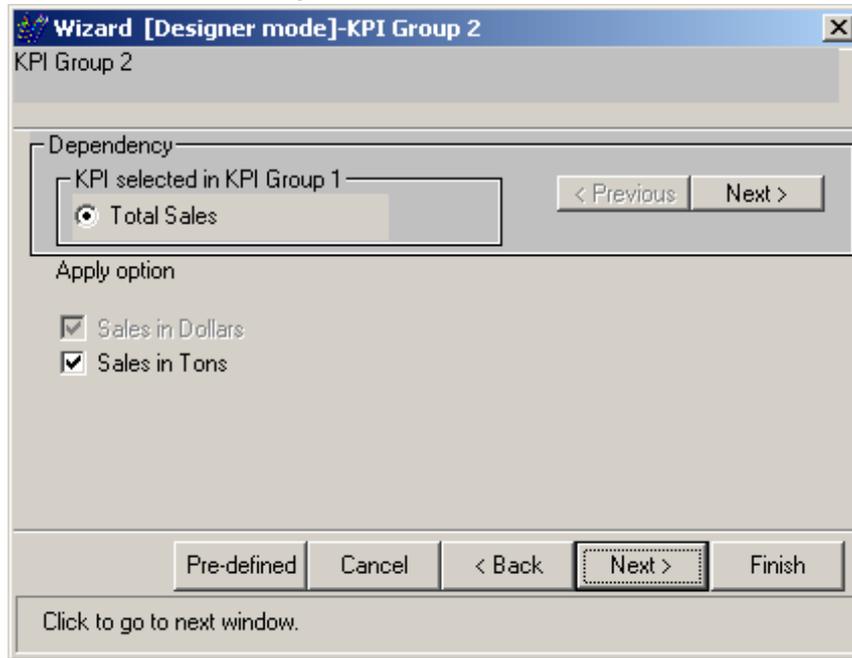
User Wizard, Parent Options Window



Use this window to select the options you want to configure. When you select options, you will be able to change the configuration of its dependent dimensions, periodicity, and calculations on subsequent screens.

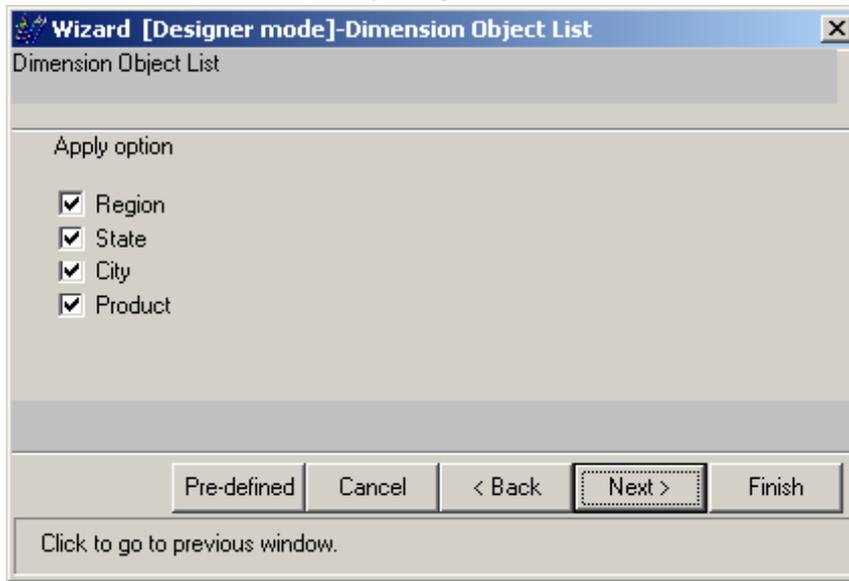
4. For each option in the analysis group on the scorecard, select the dependent options to expose. Use the Dependency window, to scroll through each option in the group, selecting and deselecting options.

User Wizard, Child Options Window



5. Click Next to choose the period options you want to hide or show in this Objective for this scorecard. Depending on your selections, you can show multiple options for the same objective. For instance, the same objective could be displayed with month, quarter or year data by selecting or deselecting the boxes that will be exposed depending on your selections in this window.
6. On the next window, you can select the calculations that you want to show or hide in this scorecard from the set of calculations configured for the Master objective. Contribution calculations will only be enabled in a comparison (trend) graph.
7. On the next screen, you can select the dimension levels that you want to show or hide from the set of dimensions configured for the Master objectives.

User Wizard, Dimension Object Options Window



Note: If dimensions are unexposed, then you can still drill to them by clicking on a series in the objective screen. The options you apply on this screen determine which options appear in the menu for dimensions on the objective.

- Repeat this process for all scorecards and objectives you want to configure.

Note: The User Wizard functionality is also available in the Performance Management Designer module as Hide/Show Measures. For more information, see: *Hiding and Showing Measures per Objective in your Scorecard*.

Modifying Master and Shared Objectives

When an objective is modified in the Objective System Library, this means that a measure is either added, deleted, or updated. These changes affect both the Master and Shared Objectives. You need to consider the following rules:

- Measures can only be added, deleted, or modified in the Objective Designer. The changes done in the designer affect the status of the master and shared objectives.
- If a measure is added to an objective, the new measure is automatically assigned to the master and shared objectives. If you want to hide this new KPI in your shared objectives, you need to hide it in the corresponding shared Objective.

Use the Objective Designer to delete a KPI from an objective. Please notice an objective needs to have at least one KPI, hence you can delete last KPI of an objective. If you want to delete the last KPI, you must delete the objective.

There are several rules that apply if you have master and shared objectives and you try to modify the scorecard selections.

- You can remove an objective that is selected in one single scorecard with no restrictions, meaning you can remove an objective that has no child or shared objectives.

- If you have one master objective and one shared objective and you remove the original master objective, your shared objective will become the master.
- If you have a master objective and more than one shared objectives you will not be able to unassign the master objective in your scorecard unless you remove your shared objectives or have one single child (shared objective) as described in the previous point.

Hide/Show Functionality

You can use the shared objectives and Hide/Show KPIs functionality in both BSC Architect and Performance Management Designer. When you use both tools, you should consider the following:

- You can continue using the BSC Architect-Builder tool to create master and shared objectives.
- Hiding and Showing KPIs in an objective is functionality available in the Performance Management Designer module as well as in the User Wizard in BSC Architect.
- The rules and validations in BSC Architect-Builder for master and shared objectives are synchronized with the changes in Performance Management Designer.
- The rules of structural modifications done to master objectives in BSC Architect such as modifying calculations, periodicity, etc. remain the same as in previous versions, meaning these modifications will be reflected in the shared objectives as well.

For additional instructions on how to use this functionality using the BSC Architect tool, see *Master and Shared Objectives*.

Configuring Master and Shared Objectives in BSC Architect – Performance Management Designer

While many Objectives belong logically in one scorecard, you may wish to share objectives between scorecards. For instance, you may want an objective to be visible to different organizational units with small variations in its view but with the same overall meaning and purpose.

Rather than copy and recreate the objective in different scorecards, you can share a master objective that can be customized in different views, hiding or exposing options that are relevant for a particular scorecard. Once this functionality has been enabled in BSC Builder, you can use Performance Management Designer to do final configuration of your objectives.

For instance, suppose the Sales Growth objective is configured as a master objective in the Regional VP scorecard but is shared with the Marketing and Corporate scorecards. The Corporate scorecard might show a high-level view of the objective showing Sales Growth by Region and Product but hide other options such as market share, number of units and so forth. By contrast, the Marketing scorecard, while retaining the same objective structure, might show more options related to product and customer type.

All these options are configured in BSC Architect > Performance Management Designer through the User Wizard.

Note: If the user creates a shared objective using a master that was in production mode, the user may need to rerun Generate Database and Data Loader on the input scorecard that feeds the master objective. This is done to make sure the shared objective show the updated information and color.

To configure the master objective:

1. Follow the steps to create a master objective in *Master and Shared Objectives* section.

Note: In BSC Architect - Performance Management Designer, you can click on the Help icon in the Information window to determine if your objective is a Master or Shared objective. For more information, see: *Objective Information Window*.

2. Define the complete set of dimensions, analysis options, periodicity, calculations, benchmark, data series, and all the data and dimension properties for the master objective.
3. Once the master is defined, you will use the wizard to define all possible hide or show analysis options, series, dimensions, calculations, and benchmarks for that shared objective. For more information, see: *User Wizard*.

To enable the User Wizard functionality:

1. Right click the objective to get the General menu.
2. Go to Define User Buttons.
3. Enable User Wizard.
4. You can go to other scorecards where the objective is shared and access the User Wizard functionality to hide or show any object configured in the master, such as KPIs, series, dimensions, calculations, and benchmarks.

To configure shared objectives:

1. Go to a second scorecard and select the shared objective. When you try to launch the same objective in a scorecard different than the Master you will notice the objective designer main menu is disabled except for Cause and Effect. The User Wizard option has to be previously enabled from the Master objective and appears enabled as an Icon.
2. Launch the User Wizard using the icon in order to define which of the options are going to be hidden or showed in the particular shared objective. See: *User Wizard*. Remember that this process is done by scorecard, so you can choose different set of options to show or hide depending on the scorecard.

When you are finished, the shared objective incorporates all the changes you have made; any fields or dimensions you unchecked will be hidden. For instance, in the Sales Growth objective, you chose to expose Region, State and Product dimension objects, but hide the other dimension objects.

Identifying Master and Shared Objectives

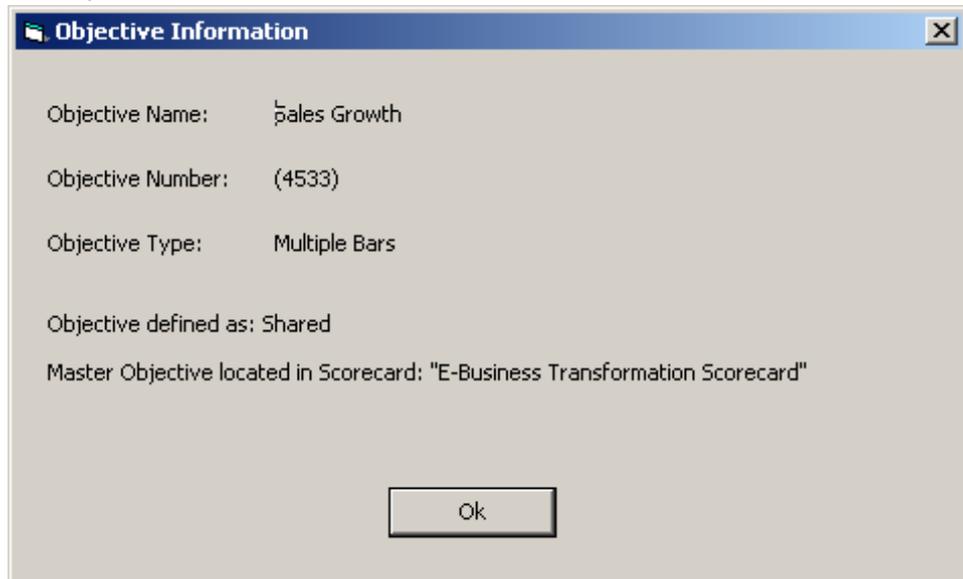
Since a master objective can reside in any scorecard, and shared objectives can also be selected in any scorecard without any restrictions, objective Designer has an Information window that allows designers to identify the type of objective being worked on.

If your objective is a master objective, you can select the Information icon to locate the master objective in the BSC Architect > Performance Management Designer. This icon appears as a question mark.

To identify master and shared objectives:

1. Select your objective in BSC Architect > Performance Management Designer.
2. Click on the Help icon available at the bottom of the objective page.
3. You will see the following window that provides information about the type of objective and where the master objective is located. If you are looking at the master objective, the system will provide you information on how many shared objectives depend on this objective.

Objective Information



Note: Be aware that every time you modify a master objective every shared objective will be affected with the change. This is especially important when you configure your master and shared objective in objective Designer. For instance, if you add or delete dimension objects, add KPIs, and add measures, all the shared objectives depending on this master are going to be refreshed. This means previous changes done to shared objectives are reset based on the master modifications.

This chapter covers the following topics:

- Balanced Scorecard Portlets
- Multiple User Support
- Grant Access to a Balanced Scorecard Portlet

Balanced Scorecard Portlets

Use the Balanced Scorecard Manager or the Performance Management User responsibility to add one or more Balanced Scorecard portlets to an Oracle Portal page.

Add portlets at the responsibility level. The security defined for the scorecard and for the responsibility applies to each portlet, so you can only add portlets for the scorecards and indicators that the responsibility has access to.

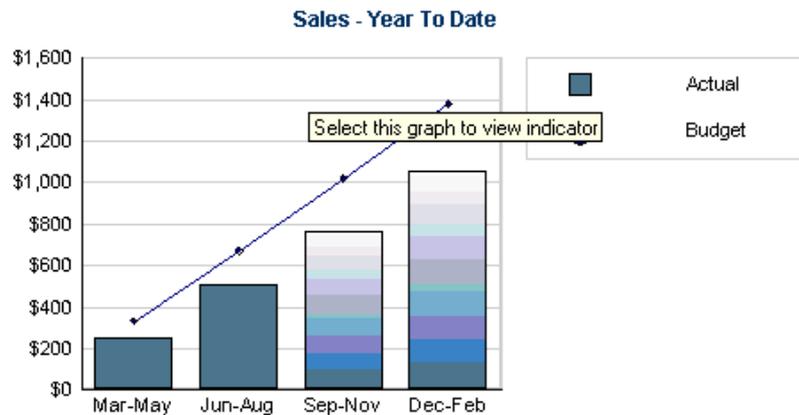
There are three types of Balanced Scorecard portlets:

- Objective Graph Portlet, page 4-1
- List of Objectives Portlet, page 4-3
- Custom View Portlet, page 4-4

Objective Graph Portlet

Use the objective graph portlet to display the graph portion of an objective report.

Product Line ALL Brand Brnd2



[View Graph](#)

Last Updated: August 22, 2001

This type of portlet has the following characteristics:

- Objective name and Scorecard where the objective belongs to are displayed at the top.
- Objective color alarm that shows the performance of the corresponding objective based on the default objective settings and access for the user.
- Last updated date of the objective.
- Drill down to the objective report or the scorecard.
- You can add one portlet for each objective.
- The objective graph portlet only displays the default objective settings. The objective settings are displayed on the portlet.
- If the objective graph is a comparison graph, the graph displays the period.
- You cannot create an objective graph for simulation trees.
- Click the objective name, "More" or "View Graph" links to view the complete objective report.
- Click the scorecard name to view the default scorecard view for the objective.

To Configure a Objective Graph Portlet

1. Login to Oracle Portal.
2. Search and edit the Portal Page where you want to add the graph portlet.
3. Click Add Portlet.
4. Search for the graph portlet within the appropriate Portlet Providers where it is available.

Important: All Balanced Scorecard portlets are delivered under the Oracle Applications Framework Provider. However, users can

configure and customize the portal providers. Check with your Portal Administrator to find out the proper provider.

5. Add the graph portlet to your page and click on apply.
6. Once the portlet appears in the portal page, save your work and close the page.
7. View the portal page and customize the graph portlet.
8. Render the portal page and click on customize on the top right corner of the portlet. This is different from customizing the portal page.
9. Choose a responsibility where the objective is accessible. The responsibility drop down will show all Balanced Scorecard responsibilities with access to the portlets
10. Choose the scorecard where the objective is published. The scorecard drop down will list all scorecards available for the selected responsibility.
11. Choose the objective for which the graph portlet will be created. The entire list of objectives accessible by the selected responsibility on the scorecard will be listed.
12. Finally, enter the name for the graph portlet and click Apply.

The graph portlet renders the default settings for the selected objective, as accessible by the responsibility.

List of Objectives Portlet

Use the List of Objective portlet to display a list of objectives from one or multiple scorecards. The list can include all of the objectives in a scorecard, or can be a custom-defined subset of the objectives.

The list of objectives portlet has the following characteristics:

- Click the scorecard name to view the scorecard's main view.
- Click the objective name to view the objective report.
- You can configure the portlet to display the following information for each objective:
 - Scorecard Name: Name of the scorecard to which the objective belongs.
 - Objective Group: Objective group to which the objective belongs.
 - Objective Name.
 - Objective Details: Actual, plan, variation, and percent of plan data will appear if user selects this option when customizing.

To Configure a List of Objectives Portlet

1. Login to Oracle Portal.
2. Search and edit the Portal Page where you want to add the List of Objectives portlet.
3. Click Add Portlet.
4. Search for the List of Objectives portlet within the appropriate Portlet Providers where it is available.
5. Add the portlet to your page and click apply.
6. Once the portlet appears in the portal page, save your work and close the page.

7. View the portal page and customize the List of Objectives portlet.
8. Render the portal page and click on customize on the top right corner of the portlet. This is different from customizing the portal page.
9. Choose a responsibility where the objective is accessible. The responsibility drop down will show all Balanced Scorecard responsibilities with access to the portlets
10. Choose the scorecard where the objective is published. The scorecard drop down will list all scorecards available for the selected responsibility.

Important: Although you can add objectives from multiple scorecards to a List of Objectives portlet, you must choose the objectives from one scorecard at a time and repeat the process for the remaining scorecards.

11. Click Next.
12. Select the objectives to display in the List of Objectives portlet. You can select any objective that is accessible to the selected responsibility on the scorecard.
13. Click on Finish.
14. Repeat the same process for additional objectives from a different scorecard.
15. Once all required objectives are added, enter a name for the portlet.
16. Select Display Group Names to show the objective group to which each objective belongs.
17. Select Display Objective Details to show the color alarm, actual, plan, variation, and percent of plan data for each objective.
18. Click Apply.

The List of Objectives portlet renders the default settings for the selected objective, as accessible by the responsibility.

Custom View Portlet

Use the Custom View portlet to display a scorecard custom view. Using this type of portlet you can display any custom view configured in the Balanced Scorecard system with all the graphic and functional advantages of this view.

Custom view portlets provide the following features:

- Graphic representation of the scorecard or a strategic or business representation of its components.
- Color evaluation of the objectives and KPIs associated to the scorecard view.
- Navigation to the objective reports associated to the custom view.
- Navigation to the KPIs associated to the custom view.
- Navigation to other graphic representations or components of the scorecard.
- Navigation to additional relevant information associated to the scorecard view using links.

Note: Ensure that when you add a custom view that the view is sized appropriately to display in a portlet.

When you add a custom view portlet to your portal, you must select which custom view you want to display in the portlet. Also, check with the scorecard owner to ensure that the portlet view is of the correct size to display in a portlet.

To grant access to a custom view portlet, associate it to a menu.

To Configure a Custom View Portlet

1. Login to Oracle Portal.
2. Search and edit the Portal Page where you want to add the custom view portlet.
3. Click Add Portlet.
4. Search for the custom view portlet within the appropriate Portlet Providers where it is available.
5. Add the custom view to your page and click apply.
6. Once the portlet appears in the portal page, save your work and close the page.
7. View the portal page and customize the custom view portlet.
8. Render the portal page and click on customize on the top right corner of the portlet. This is different from customizing the portal page.
9. Choose a responsibility from where the custom view is accessible. The responsibility drop down will show all Balanced Scorecard responsibilities with access to the portlets
10. Choose the scorecard where the custom view is published. The scorecard drop down will list all scorecards available for the selected responsibility.
11. Choose the custom view from list of custom view that are accessible to the selected scorecard.
12. Enter the name for the custom view portlet and click Apply.

Related Topics

[Oracle Portal documentation](#)

Multiple User Support

Multiple users can access Balanced Scorecard portlets based on their level of access, which is defined by their responsibility. This allows you to configure portlets only once and they can be then used by multiple end users without additional individual user customization.

The way this works and behaves for users is different for each portlet type.

For Objective Graph Portlet

Once the users open and run the portal page, the graph portlet will render information as follows based on the user access:

- If users share the same responsibility as the administrator, they will see the same information.
- Users have access only to their portion of data.

- If users do not have access to the objective using any responsibility assigned to them, they get an error message indicating that the portlet cannot be rendered due to insufficient privileges.

For List of Objectives Portlet

Once the users open and run the portal page, the list of objectives portlet will render information as follows based on the user access:

- If users share the same responsibility as the administrator, they will see the same information.
- Users have access to objectives in the portlet if at least one responsibility assigned to them has access to all objectives.
- If users do not have access to all objectives in the portlet using any responsibility assigned to them, they get an error message indicating that the portlet cannot be rendered due to insufficient privileges.

For Custom View Portlet

Once the users open and run the portal page, the custom view portlet will render information as follows based on the user access:

- If users share the same responsibility as administrator, they will see the same information.
- Users have access to the portlet if at least one responsibility assigned to them has access to the required scorecard and its custom views.
- If users do not have access to the scorecard and its custom views, they get an error message indicating that the portlet cannot be rendered due to insufficient privileges.

Important: Customizing Balanced Scorecard portlets will affect the content for all users who access them. Therefore, it is recommended that only the owner of the portal page configures and modifies the Balanced Scorecard portlets.

Grant Access to a Balanced Scorecard Portlet

To use any of the Balanced Scorecard portlets, you must add the portlet to the responsibilities' menu.

To Grant Access to a Balanced Scorecard Portlet:

1. Identify the menu that you want to attach the portlet to.
2. Log into Oracle Applications using the System Administrator responsibility.
3. Add the portlet to the menu. You can add multiple portlets to each menu.

The following table contains the values for Prompt, Function and Description of each Balanced Scorecard Portlet.

Balanced Scorecard Portlet Prompts, Functions and Descriptions

Prompt	Function	Description
Balanced Scorecard Graph Portlet	Balanced Scorecard Graph Portlet	Balanced Scorecard Graph Portlet for Oracle Portal
Balanced Scorecard List of Objectives Portlet	Balanced Scorecard List of Objectives Portlet	Balanced Scorecard List of Objectives Portlet for Oracle Portal
Balanced Scorecard Custom View Portlet	Balanced Scorecard Custom View Portlet	Balanced Scorecard Custom View Portlet

4. Check the Grant check box.
5. Save your changes.

Related Topics

Oracle Applications System Administrator Guide

This chapter covers the following topics:

- Assign Responsibilities to Users
- Assign Scorecards to Users
- Assign Roles to Designers

Assign Responsibilities to Users

To view, design, or administer Balanced Scorecard, assign the appropriate responsibility to each Oracle Applications user. Users can be assigned more than one responsibility.

The following is the list of preseeded Balanced Scorecard responsibilities:

- **Performance Manager Designer:** Enables access to all of the scorecard design features. With this responsibility, you can create scorecards, views, objectives, K PIs, and dimensions. You can also create dashboards and reports, and publish them. Assign this responsibility to those users who need to create prototypes and any of the above mentioned objects.
- **Performance Management Administrator:** Enables access to all of the administration features of significant and low impact on the system. With this responsibility you can set up Balanced Scorecard, generated database objects, load data, manage sessions, and migrate BSC systems. Assign this responsibility only to those users who will have control and responsibility, to set up and administer the entire Balanced Scorecard System.
- **Performance Management Database Administrator:** Enables access to only the medium and low impact administration features. With this responsibility you can manage user sessions, generate database objects, and load data for selected objectives and reports. Assign this responsibility only to those users who will have control and responsibility, to implement and administer selected objectives or reports in the Balanced Scorecard System.
- **Balanced Scorecard Manager:** Enables access to the features of the Performance Management Designer and the Performance Management User responsibilities as well access to managing sessions. This responsibility also provides access to the Balanced Scorecard Architect functionality, including some system setups and global profiles. Assign this responsibility only to selected users who will have control and responsibility over the entire system or require access to modify the descriptive information of Balanced Scorecard objectives.

- **Balanced Scorecard Supervisor:** Enables access to the supervisor-administration features. Assign this responsibility to those users who require to modify the concurrent requests programs and BSC lookups.
- **Performance Management User:** Enables access to view scorecards.

Use the system administrator responsibility to assign these responsibilities to your users.

Related Topics

For information on how to assign responsibilities to Oracle Applications users, see: *Oracle Applications System Administrators Guide - Security*.

Assign Scorecards to Users

To view a scorecard, the Administrator must assign the scorecard to the Viewers who are responsible for monitoring those scorecards. Viewers are any users who are assigned the Performance Management User responsibility.

To assign scorecards to users:

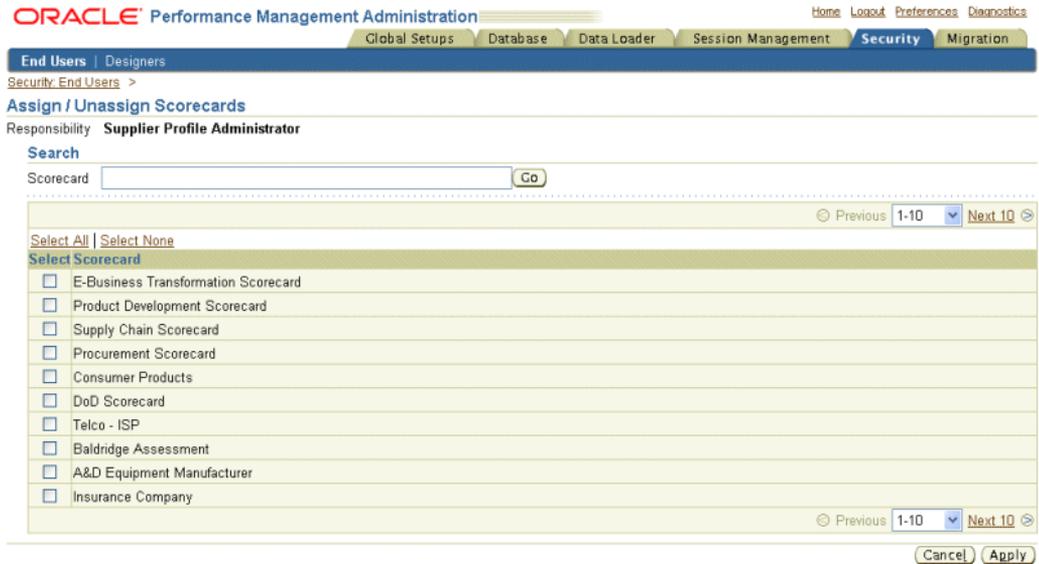
1. Log into Oracle Applications using the Performance Management Administrator responsibility.
2. Navigate to Security > Administer End User Access.
3. Query and select a responsibility.

The screenshot shows the Oracle Performance Management Administration interface. At the top, there are navigation tabs: Home, Logout, Preferences, Diagnostics, Global Setups, Database, Data Loader, Session Management, Security, and Migration. The main heading is 'Administer End User Access'. Below this is a search bar with the text 'suppl%' and a 'Go' button. There are links for 'Expand All' and 'Collapse All'. The main content is a table with the following columns: Focus Name, Assign/Unassign, Details, and Access. The table lists various responsibilities under a 'Root Node'.

Focus Name	Assign/Unassign	Details	Access
▼ Root Node			
Supplier Drop Ship, Operations	+		
Supplier Engineer	+		
Supplier Profile Administrator	+		
Supplier Profile Administrator Vision Germany	+		
Supplier Profile Administrator, Progress S&L	+		
Supplier Profile Administrator, Vision Health Services	+		
Supplier Profile Administrator, Vision Project Manufacturing USD	+		
Supplier Profile Administrator, Vision Project Mfg	+		
Supplier Profile Administrator, Vision Services	+		
Supplier Profile Manager	+		
Supplier Registration	+		
Supplier Scheduling	+		

The list of available responsibilities is restricted to the Oracle Applications users who have the Performance Management Viewer responsibility assigned to them.

4. Click Assign/Unassign for the required responsibility.



5. Query the scorecards that you want to add to the responsibility.
6. Enable the check box next to each scorecard that you want to assign to the responsibility.
7. Click Apply to save your work.

You can click Details to view the list of scorecards currently assigned to the end user responsibility.

Important: By default, users have access to all objectives that belong to a scorecard at the time it is associated to their responsibility. However, for the new objectives that are added to the scorecard after the access has been granted to the responsibility, access must be explicitly granted before these responsibilities can use them. To do this follow the steps to grant or revoke access to objective information

To grant and revoke access to objective information to users:

1. After locating the responsibility for which you want to grant or revoke the access, expand the list of scorecard.
2. Select Assign/Unassign in front of the scorecard.
3. Select the objectives for which you want to grant access and clear the ones for which you want to revoke access for the selected responsibility.
4. Click Apply to save your work.

To set valid dates for access

5. Select update for the scorecard.
6. Enter the start and end date to define the period for which users will have access to the scorecard.

To restrict access to scorecard information to users

If the scorecard has common dimensions defined (also known as list button), different users with different responsibilities can see portions of the data that are relevant to their work. This functionality is known as, access level for scorecard information.

7. From the Item Values menu, select a dimension value.

The user's balanced scorecard is filtered to display data for this dimension value only. The alarm colors on the main panel are calculated based on the selected common dimension value. Also, the user does not have access to any other drill down values from the dimension level.

8. Use the search functionality to locate a specific value.

A list of values that match the search criteria appear. You can select only one value.

9. Click Apply to save the modifications.

10. **Important:** All users with access to the same responsibility will have access to the same scorecards and the information in them.

Assign Roles to Designers

For each scorecard, the scorecard designer or an administrator can assign roles to other designers. You can grant roles to other designers if you want that designer to be able to update a scorecard or perform administrative functions for the scorecard. The available roles are:

- **User:** You can view the scorecard properties. This is the default setting for all users.
- **Designer:** You can view and update the scorecard.
- **Administrator:** You can:
 - View and update the scorecard properties
 - View the list of users who have access to the scorecard
 - Grant or revoke access to the scorecard.
 - Change roles
 - Review the access history for a scorecard

If a designer created a scorecard, the designer is automatically assigned the Administrator role. All other designers are automatically assigned the User role.

This functionality is based on Oracle Applications Role Based Access Control (RBAC).

You can delegate roles by object (scorecard) or by responsibility.

To assign roles to designers:

1. Log into Oracle Applications using the Performance Management Administrator responsibility. You can log in using the Performance Management Designer responsibility if you are the scorecard designer.
2. Navigate to Security > Designers.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database Data Loader Session Management **Security** Migration

End Users | Designers

Administer Designer Access

Objects Users

Search

Search Scorecard Go

Select Object: Add Users Previous 1-25 Next 25

Select All | Select None

Select Object	Object Type	Details
<input type="checkbox"/> A&D Equipment Manufacturer	Scorecard	
<input type="checkbox"/> A&D Products Manufacturer	Scorecard	
<input type="checkbox"/> ABC Company	Scorecard	
<input type="checkbox"/> ABC Suppliers	Scorecard	
<input type="checkbox"/> Aerospace & Defense Scorecards	Scorecard	
<input type="checkbox"/> Airline Scorecard	Scorecard	
<input type="checkbox"/> BSC Examples	Scorecard	
<input type="checkbox"/> Baldrige Assessment	Scorecard	
<input type="checkbox"/> Banca - Cajeros	Scorecard	
<input type="checkbox"/> CPG Sector Scorecards	Scorecard	
<input type="checkbox"/> CRM Life Sciences Scorecard	Scorecard	
<input type="checkbox"/> Cellphone Provider Operations	Scorecard	
<input type="checkbox"/> City Public Works	Scorecard	
<input type="checkbox"/> City Scorecard	Scorecard	
<input type="checkbox"/> Communications Sector Scorecard	Scorecard	

3. Select the Objects or the Users subtab.
4. Query and select the scorecard or user.

The list of available designers is restricted to the list of Oracle Applications users who have the Performance Management Designer responsibility assigned to them.

5. Click Add Objects or Add Users. The list of selected scorecards or users appears.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database Data Loader Session Management **Security** Migration

End Users | Designers

Add Users: Objects

Object	Object Type
Supply Chain Scorecard	Scorecard

Cancel Continue

Cancel Continue

6. Click Continue.
7. Query and select the users or scorecards that you want to assign. Click Add.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database Data Loader Session Management **Security** Migration

End Users | Designers

Add Users: User Selection

Cancel Back Finish

Search

Search User ID JBLAKE Add

User	User ID	New Role	Start Date	End Date	Remove
Blake, Jo	JBLAKE	User	10-Apr-2006		

Cancel Back Finish

8. Assign a role to the user for the scorecard. The default role is User.

9. Specify a Start Date for the role. If you want the role to expire in the future, enter an End Date; otherwise leave this field blank.
10. Click Finish to save your work.

Related Topics

Oracle Applications System Administrator's Guide - Security.

Set Up Global Parameters

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database Data Loader Session Management Security Migration

Global Setups Cancel Save

Architecture

Reset button allows to return summarization settings used last time the Generate Database ran successfully

Use Materialized Views for Summarization

Number of Materialized Views Reset
Integer value >= 2

System Properties

Defining type of currency will affect all indicators and measures in the system

* Currency Symbol

Enabling Advanced UI Features will restrict the number of values displayed for a Dimension Object in the Viewer

Enable Advanced Display Features

Other Applications

This selection enables Generated Source Objects in other Applications different to Balanced Scorecard

Make Generated Summaries Available Cancel Save

When the scorecard design is complete, and before you run the generate database process, use the Performance Management Administrator responsibility to complete the following global setups:

- **Architecture–Use Materialized Views for Summarization:** Select this option if you want to use Materialized View architecture or Analytical Workspaces architecture.

The materialized view architecture balances storage and query performance requirements, improves the ability of the system to summarize data, and reduces table space consumption. In addition, it supports automatic data recovery that is transparent to users. With the materialized view architecture enabled, data is automatically refreshed from one summarization level to another. Unlike the existing summarization architecture, you do not need to reload data every time the summarization level is modified.

You can also enable this architecture by setting the BSC: Materialized Views Architecture site level profile option to Yes.

Regardless of which method you use, when you enable this option, the BSC: Advanced summarization level profile option is automatically set to 1000. This value represents the number of materialized views that are used in the summarization architecture. You can change this value if you want to change the number of materialized views that are used for summarization.

If this is the first time that you are enabling this option, you should back up your data before you run the Generate Database request.

You should complete these global setups once, before you perform the initial run of the Generate Database request. If you change these setups after running the Generate Database request, you must regenerate the database objects and reload data.

- **System Properties**

- **Currency Symbol:** Define the type of currency that you want to use for all display purposes, such as in graphs or tables. This will affect all KPIs and measures that are using currency format and are available in the system.

The default value is "\$", which you can change as per your requirements. However, you need to ensure that the symbol is not more than four characters, and it does not contain "%", ">", "<", "+", "-", ",", ";", ".", or "#".

- **Enable Advanced Display Features:** Select this option if you want to restrict the number of values that are displayed for a dimension object. This number is defined in the FND: View Object Max Fetch Size profile option. The default number is 200.
- **Other Applications—Make Generated Summaries Available:** Select this option if you want the dimensions and KPIs that you create in Balanced Scorecard to be available in other applications. For example, you can add Balanced Scorecard KPIs to a Daily Business Intelligence dashboard or report.

Generate Database

This chapter covers the following topics:

- Overview of Generating the Database
- View Current Status
- Run the Generate Database Process
- Review Objectives/Reports and Tables Documentation
- Monitor Requests
- Balanced Scorecard Calculation Capabilities
- Troubleshooting

Overview of Generating the Database

After scorecard design is complete or after you create generated source reports, run the Generate Database request to generate the database objects that are needed to support these objectives.

The Generate Database request generates the input tables and summarization levels for objectives and generated source reports. The Generate Database request attempts to optimize the database objects that are required, so several objectives may share the same underlying objects.

Run the process each time the Designer modifies an objective or a generated source report and you want to update the scorecards to reflect changes that are made. Also, run this process if you change the architecture method.

The following table lists the table objects that are generated by the Generate Database process.

Generated Tables

Table	Description
Dimension Tables (BSC_D)	Contains dimension level values. Normally, one dimension table exists for each dimension. Use the Data Load process to populate these tables with data.
Interface Tables (BSC_I)	Contains data that is used to support objectives, generated source reports, and scorecards. Use the Data Load process to populate these tables with data.
Base Table (BSC_B)	Contains the normalized and historic data used to support objectives, generated source reports, and scorecards.
System levels (BSC_S)	Contains the calculated and denormalized data that is used to support objectives, generated source reports, and scorecards. For precalculated objectives, these summary levels are populated with the data provided in the interface tables without further calculations. For other remaining type of objectives (standard and benchmark at different levels), these summary levels are automatically populated when you load the interface tables.
Historical Tables (BSC_BAK)	Contains the historical data for each objective, generated source report, and scorecard. These tables are automatically populated when you run a Generate Database process for the corresponding objectives and reports associated with the tables. Data in these tables can be deleted by the administrator or can be deleted the next time the Data Load process is run.
Temporary Tables (BSC_T)	Contains temporary data for calculations during the Data Loader process.

Note: You must use the Data Load process to populate the dimension tables and interface tables with data. You must also use the Data Load process to populate the system tables for precalculated KPIs. All other tables are automatically generated and populated by Balanced Scorecard.

View Current Status

The screenshot shows the Oracle Performance Management Administration interface. The top navigation bar includes links for Home, Logout, Preferences, and Diagnostics. Below this is a secondary navigation bar with tabs for Global Setups, Database, Data Loader, Session Management, Security, and Migration. The main content area is titled 'Current Status' and features a 'Generate Database' button. The status information is as follows:

Objectives and Reports Requiring Data Reload and Summary Refresh	2676
Objectives and Reports Requiring Summary Refresh	36
Objectives and Reports Pending Deletion	29
Advanced Summarization Level Update	No

A second 'Generate Database' button is located at the bottom right of the status section.

The Generate Database window indicates the current objective status as follows:

- **Objectives and Reports Requiring Data Reload and Summary Refresh.** The number of objectives and generated source reports that require changes to the structure of their input tables or summarization levels. If you have objectives and reports that fall into this category, you must reload data for the affected objectives and reports.
- **Objectives and Reports Requiring Summary Refresh.** The number of objectives and generated source reports that require data to be refreshed. You do not need to reload data for these objectives and reports. Instead, you must run the recalculate process when you perform the data load so that the data is updated accordingly.
- **Objectives and Reports Pending Deletion.** The number of objectives and generated source reports that are in production mode, but that have been flagged for deletion. The interface tables and summarization levels for these objectives and reports will be removed. You do not need to run any additional processes in this case.
- **Advanced Summarization Level Update.** The number of modified summary levels. This flag triggers Generate Database to generate the appropriated number of materialized views for all objectives and generated source reports. You do not need to reload data. Use this status to determine when and how frequently you need to run the Generate Database request.

To view the current status of the database:

1. Log in to Oracle Applications using the Performance Management Administrator responsibility.
2. Navigate to Database > Generate Database.

Run the Generate Database Process

Run the Generate Database process to generate the database objects that are needed to support the objectives and generated source reports. When you are ready to run the process, ensure that all Architect, Designer, and Migration sessions are closed. When you are running the process for all objectives, ensure that all Loader sessions are also closed. During this time, users can continue to view scorecards and reports with prototype data.

You should review the scorecard and report design and approve it with your implementation team and other stakeholders before you run the Generate Database process.

Prerequisites

- Complete the Balanced Scorecard global setup, page 6-1.
- Ensure that all objectives are assigned to at least one scorecard.
- Ensure that all Architect (including migration) and Designer sessions are closed. See: User Sessions, page 9-1.

To run the Generate Database process:

1. Log in to Oracle Applications using the Performance Management Administrator responsibility.

2. Navigate to Database > Generate Database.
3. Click Generate Database.



4. Select one of the following options:
 - **Process all objectives.** Creates a backup of existing database objects, then truncates all existing objects and regenerates them. You must reload your data if you select this option.
 - **Process modified objectives.** Creates a backup of existing database objects, then updates the database objects that have pending modifications as well as any interrelated objects.
 - **Process selected objectives.** Creates a backup of existing database objects for the selected objectives, then truncates the existing objects and regenerates them. You must reload your data if you select this option for objects in production mode.

Using this option ensures that the system will only lock the related objects for the selected objectives to be processed. Hence, other users may be able to work on configuration, load data, and do other tasks that do not involve selected objectives and their related objects. This option also allows multiple users to schedule their generate database processes for different objectives.

- **Process selected reports.** Creates a backup of existing database objects for the selected generated source reports, then truncates the existing objects and regenerates them. You must reload your data if you select this option.

Important: For objectives that are not involved in the Generate Database process, you can parallel run the Loader process.

The backup tables have the same name as the original table, but have the suffix `_BAK`.

5. For the Process all objectives and Process modified objectives options, click Next to view the list of objectives.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database Data Loader Session Management Security Migration

Generate Objectives/Reports Tables Requests

Objectives/Reports **Generation Method** Schedule

Generate Database: Generation Method Cancel Back Step 2 of 3 Next

Search Objective Go

Objective	Impact	Generation Method	Implementation Type	Status	Update	Remove
Sales Growth [3001]	Data Reload and Summary Refresh	Standard	Materialized Views			
Top of Mind [3002]	Data Reload and Summary Refresh	Standard	Materialized Views			
Quality Assurance [3003]	Data Reload and Summary Refresh	Standard	Materialized Views			
Price Gap [3004]	Data Reload and Summary Refresh	Standard	Materialized Views			
Product Availability [3005]	Data Reload and Summary Refresh	Standard	Materialized Views			
Distribution Effectiveness [3006]	Data Reload and Summary Refresh	Standard	Materialized Views			
Plant Production Efficiency [3007]	Data Reload and Summary Refresh	Standard	Materialized Views			
SKU Performance [3008]	Data Reload and Summary Refresh	Standard	Materialized Views			
Overhead Expenses [3009]	Data Reload and Summary Refresh	Standard	Materialized Views			
Strategic Information [3011]	Data Reload and Summary Refresh	Standard	Materialized Views			

Previous 1-10 Next 10

Cancel Back Step 2 of 3 Next

For the Process selected objectives and Process selected reports options, click Next to select and add the required objectives and generated source reports, respectively.

For each objective, update the implementation type and generation method, if required.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database Data Loader Session Management Security Migration

Generate Objectives/Reports Tables Requests

Update: Sales Growth [3001] Cancel Apply

Implementation Type

Materialized Views
 Analytic Workspaces

Generation Method

Standard
 Precalculated
 Benchmarks at Different Levels

Benchmarks at Different Levels
 If Benchmarks at Different Levels generation method is selected, then specify the period and dimension objects for which benchmark data will be loaded.

Periods

Year Month
 Quarter

Dimension Set 0

Hierarchy 1: Brand
 KPIs: Availability, MarketShare, Salesin

Cancel Apply

For each report, update the implementation type, if required.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database Data Loader Session Management Security Migration

Generate Objectives/Reports Tables Requests

Update: Travel Time and Distance Trend [6750] Cancel Apply

Implementation Type

Materialized Views
 Analytic Workspaces

Cancel Apply

Possible implementation types are:

- **Materialized Views.** Stores summary data for the required objective or generated source report in Materialized Views. This is the default implementation type for all objectives and reports.

The Materialized View architecture balances storage and query performance requirements, improves the system's ability to summarize data, and reduces table space consumption. In addition, it supports automatic data recovery that is transparent to users. With the Materialized View architecture enabled, data is automatically refreshed from one summarization level to another. Unlike the Summarization architecture, you do not need to reload data every time the summarization level is modified.

- **Analytical Workspaces.** Stores summary data for the required objective or generated source report in Analytical Workspaces.

Analytical Workspaces architecture is essentially recommended for Objective/Report configurations using hierarchies of four or more dimension objects (parent-child relationships), or recursive dimension objects. In these cases, Analytical Workspaces are scalable for maintenance of dimension objects and new fact data. The loading time is also faster when using Analytical Workspaces compared to Materialized Views. However, the memory space consumption may be higher in case of Analytical Workspaces due to session data maintained by the system.

Important: Balanced Scorecard will prevent the use of Analytical Workspaces in the following cases:

- Precalculated objectives.
- Objectives with benchmarks at different levels for KPIs with projection.

Possible generation methods are:

- **Standard.** Creates one input table for all data types (actual, plan, and any benchmark data) for all dimension combinations. The input table collects data at the lowest dimension level (for example, daily). Higher dimension levels are calculated by rolling up information from the lowest level. Designers are responsible for specifying a roll-up method for each measure. This is the default generation method for all objectives.
- **Precalculated.** Creates a separate input table for each dimension combination. You can load all data types into each input table. If you select this option, the system does not calculate total values for the dimension combination. Instead, administrators are responsible for loading this information.
- **Benchmarks at Different Levels.** In cases in which plan and benchmark data is not summarized at the same level as the actual data (for example, forecasts are monthly, whereas actual data is daily), users can use the Benchmarks at Different Levels generation method.

If you select Benchmarks at Different Levels, select the level of summarization that you want to use for period, dimensions, and KPIs. By default, all periods, dimensions, and KPIs are selected. You must have at least one summarization level selected for each category.

When you select Benchmarks at Different Levels, the Generate Database process generates a set of two input tables for each objective. Table one, for the actual data, is at the lowest summary level. The second table, for the plan data, is at a higher level defined by the designer. If you use the time dimension with periods that cannot roll up to higher periods, then additional tables are created.

6. Click Next to schedule when you want to run the Generate Database process.

ORACLE Performance Management Administration

Home Logout Preferences Diagnostics

Global Setup Database Data Loader Session Management Security Migration

Generate | Objectives/Reports | Tables | Requests

Objectives/Reports Generation Method Schedule

Generate Database: Schedule

Cancel Back Step 3 of 3 Finish

Options Process immediately Schedule

Start Date 10-Apr-2006

Start Time 04:53 AM PM

Notifications

Add Recipients

Recipient	Status	Remove
No recipient has been assigned.		

Cancel Back Step 3 of 3 Finish

Set up notifications that you want to send when the request finishes. The list of available recipients is based on Oracle Workflow. For each recipient, you can specify the status for which that recipient will receive a notification: Normal, Warning, or Error.

7. Click Finish to submit the request.

Use the Request subtab to view the progress of the request.

Related Topics

For information about how to monitor requests, see: Monitor Requests, page 7-9.

Review Objectives/Reports and Tables Documentation

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database Data Loader Session Management Security Migration

Generate | Objectives/Reports | Tables | Requests

Review Tables Printable Page

Search

Previous 1-25 Next 25

Table Name	Table Type	View Columns	View Objectives/Reports	View Dependencies	Rename
BSC_B_10	Summary				
BSC_B_102	Summary				
BSC_B_1027	Summary				
BSC_B_1028	Summary				
BSC_B_1029	Summary				
BSC_B_103	Summary				
BSC_B_1030	Summary				
BSC_B_1031	Summary				
BSC_B_1033	Summary				
BSC_B_1035	Summary				
BSC_B_1036	Summary				
BSC_B_1037	Summary				

When the scorecards are in production mode, you can view the generated system documentation by navigating to Database > Objectives/Reports or to Database > Tables.

You must run the Generate Database request at least once to view the tables. If a request is pending, you can view the existing documentation while the request is processing. The generated documentation shows:

- Interface Tables by Objective and Report, or Objectives and Report by Interface Table
- Columns in each table
- View Objectives/Reports
- Dependencies and hierarchies between tables
- Metadata Results

The following table indicates what information is available for each type of table.

Table Type	View Columns	View Objectives/ Reports	View Dependencies	Rename
Fact Interface Tables	Yes	Yes	Yes	Yes
Dimension Interface Tables	Yes	Yes	Yes	No
Base Tables	Yes	No	Yes	No
Dimension Tables	Yes	No	Yes	No
Summary Tables	Yes	No	Yes	No

You can also rename the interface tables, if necessary. You can rename the interface tables at any time, even if a Generate Database request is pending. The system updates that pending request with the new table name.

In addition to being able to view the documentation online, you can use the following documents that are generated by the Generate Database request.

- **System.txt.** This document lists the generated tables and illustrates the relationships between them. This document is generated only if the request set finishes with a status of Normal. This content is available in the output file of the PMA Database - Generate Documentation program.
- **Metadata results.** This document lists the structural changes that are made to the metadata. It also lists the old and new input table names that are used by each objective and the backup table of the base summary level table. This information is available in the output file of the PMA Database - Generate Database program.

Monitor Requests

Status	Name	Phase	Schedule Date	Details	Output	Request ID
	PMA Database - Generate Documentation	Completed	10-Apr-2006 16:23:36			3236610
	PMA Database - Generate Database	Completed	10-Apr-2006 16:14:46			3236602

To monitor the status of a pending Generate Database request, navigate to Database > Requests. The Requests subtab displays the list of submitted programs, with their current status, name, phase of the request, the date submitted, and the request ID. It also provides links to the program details and output files. You can use this subtab to view the pending and completed requests, or to search for a particular request. You can also use the Concurrent Manager to monitor the status of any request.

If a request finishes with a warning or an error, check the log file to review the details of the issue that caused the problem. Fix the issues that are listed and rerun the request.

Related Topics

Oracle Applications System Administrator Guide.

Balanced Scorecard Calculation Capabilities

The Balanced Scorecard system can aggregate data to calculate dimension totals and roll up periods for each objective. For example, it can perform the calculation of ALL Regions, such as West, East, North, and South as long as data is entered separately for each region. It can also do roll up of monthly and quarterly data when the lowest level of data required is daily. In this case, users need to see not only daily but monthly and quarterly data. Daily data is rolled up to monthly and quarterly without requiring user to load it monthly and quarterly data.

Standard Calculated Objectives

The Balanced Scorecard Data Loader can summarize most objectives. For example, the Total for Sales Volume Objective, can be calculated for both products and states, because dollar amounts can be totaled across all dimension objects. In this case, Balanced Scorecard will correctly total each product sum, each state sum, and the overall total.

The Generate Database evaluates the data requirements for objectives, and generates the interfaces tables and summary levels based on the generation method specified for the objective. Generate Database will create the minimum number of interface tables based on if the KPIs can be aggregated or not. For example, if a KPI has day, month, and quarter periodicities, and its data can be aggregated. In this case, Generate Database will only create interface tables for day periodicity and calculate monthly and quarterly data from the daily information.

The procedure is similar for summarizing dimensions. If calculations can be run on a KPI then the Generate Database will only require values for each individual dimension object value, such as widgets, gadgets, spinners, and throwers. The totals will be calculated automatically by the Data Loader program.

The BSC can perform KPI transformations where the data can simply be summarized to come up to a total, such as units, amounts, or currency. For KPIs that contain data that can be summarized, make sure you select Standard as the generation method.

Pre-Calculated Objectives

Another type of objectives are percentage or ratio based KPIs. For these objectives data cannot be aggregated by the system using any of the aggregation methods supported by Balanced Scorecard, such as average, sum, max, and min.

Because the system does not have the source data from which the percentages were originally calculated, or the KPIs cannot be calculated using the methods mentioned before, Balanced Scorecard provides the pre-calculated generation method. For Objectives using this type of complex data or KPIs, use the pre-calculated generation method. The Generate Database will not optimize the interface tables for these objectives, which means that all data for these objectives will have to be entered in the interface tables, including the pre-calculated summary data. User must properly aggregate the data and provide the totals in the interface tables for each dimension object combination.

- All KPIs associated to an objective generated as pre-calculated will be treated as pre-calculated.
- A KPI used in a pre-calculated objective can also be used in a standard objective. In this case only the precalculated objective will show the data as entered by user. The same KPI in a standard objective will aggregate the data based on the aggregation method.

If pre-calculated method is used, Data Loader will upload the input data provided by users and display it without transformations in the objective report. Generate Database will generate a different table for each dimension object combination required for the corresponding objective. User must ensure to provide:

- The total for the precalculated KPIs must be entered using 0 for each dimension object in the interface table.
- All different combinations of totals must be entered in the interface table.
- Provide information for all different applicable periods used by the precalculated objective.

Individual Roll-Up Tables for Actual and Benchmark Data

In some cases, customers may have objectives with KPIs where the actual information can be provided for all dimension objects of the objective, but the benchmark information can be provided only for specific subset of the dimension objects. Balanced Scorecard supports this type of requirement by providing individual roll-up tables, also known as Benchmarks at Different Levels generation method, through Generate Database.

In this case the actual data is expected at the level of dimension objects and periodicity of the objective, while the plan and benchmark data can be at a higher level. The Data Loader then calculates the summary levels by aggregating data according to the hierarchies specified by the designer, for both actual and benchmark data.

To accomplish this, Generate Database creates separate interface tables for actuals and benchmarks. Designers or system administrators must choose whether or not an objective will use Benchmarks at different level generation method for their objectives. By default, the actual and benchmark data use the same input table.

The following rules apply when setting up separate input tables for the actual and benchmark data:

- You can choose whether or not an objective will use different input tables for actual and benchmark data. By default, the actual and benchmark data use the same interface table if different dimensionality is not selected.
- You can specify the dimension level for the target by dimension set. For example, if an indicator has two dimension sets,
 - Dimension Set 1: Region, Branch, and Product
 - Dimension Set 2: Region and Customerthen you can define dimension objects for both dimension sets.
- You must specify the dimension level for ALL dimension families. For example, an indicator in Dimension Set 1 has five dimensions, such as region, city, office, product type and product. Based on the relationships there are two families here,
 - Dimension Family 1: Region - City - Office
 - Dimension Family 2: Product Type - Productthen you must specify one level in each family. For example, Region-Product or City-Product type.
- You must specify at least one periodicity level and provide targets for that level.
- The dimension levels that are specified in a dimension set will apply to all the KPIs used for that dimension set. For example, if an indicator in Dimension Set 1 uses two data sets, sales and units, then you must specify that the targets be by Region-Product and that it applies to both Sales and Units.
- You cannot select a dimension level for each benchmark. The level that you assign for targets applies to all other benchmarks. Generate Database optimizes the number of interface tables for the benchmark based on the requirements of all objectives. BSC Loader will calculate rollups for benchmark summary levels. The aggregation method calculation, such as SUM or AVG that is specified for the measure will apply to actual and benchmark data.

Troubleshooting

The following information is provided to aid in resolving any problems you may have running the Generate Database process.

- **System is locked**

To run the Generate Database request, the related objects used by the objectives or reports to be processed must be unlocked. Some processes such as migration lock the entire system, preventing users to run generate database process in parallel.

The Generate Database will lock only the objects related to the selected objectives or reports that need to be processed. Other users may be able to work depending on the task they are performing. You can use the Session Monitor feature to see which users are currently on the system.

- **Another Generate Database process running**

If another Generate Database request is already running, you cannot launch another request immediately. Wait for the current request to complete before you launch a new Generate Database request. Use the Monitor Requests feature to determine whether any current or pending requests exist.

- **Objectives not assigned**

All objectives must be assigned to a scorecard before you can run the Generate Database request. If you attempt to run the request and an objective is not assigned to a scorecard, an error message appears listing the objectives that need to be assigned.

- **Consistency issues**

If the Generate Database process finds any data consistency errors during processing, for example nonsynchronized, shared KPIs, those errors are listed in the log file.

- **Request completes with Warning or Error**

If the request finishes with a warning or an error, check the log file or click View Invalid Records to see the list of invalid records that caused the problem. Fix the records that are listed and rerun the request.

- **Unable to receive notifications**

If users are not receiving notifications on the requests results, check that each user is associated to a person and has an e-mail address.

Data Loader

This chapter covers the following topics:

- Overview of Loading Data
- Load Dimension Objects
- Load Interface Tables
- Load Objectives or Reports
- Delete Objective or Report Data
- Advance Calendar
- Monitor Requests

Overview of Loading Data

After you run the Generate Database process, use the Data Loader process to load or refresh data for custom dimension objects, objectives, and generated source reports.

When you run the Data Loader process, the system automatically loads data into the interface tables and then refreshes the base summary tables, materialized views, and views that support each object.

You do not need to use the Data Loader process to load data for preseeded dimension objects. Preseeded dimension objects appear grayed out in the Data Loader. Instead, use the Daily Business Intelligence Request Set Generator.

You can also use the Data Loader to advance the calendars that are used in Balanced Scorecard and to monitor the status of submitted processes.

Related Topics

“Initial and Incremental Request Sets” in the Oracle Daily Business Intelligence Implementation Guide.

Load Dimension Objects

To load data for dimension objects, specify one of the following data load methods for each dimension object:

- Enter data manually
- Load data from a text file

- Load data using a program
- Load data using Microsoft Excel

No load programs are provided with Oracle Balanced Scorecard. Therefore, if you want to use a program to load data, you must create that program using Structured Query Language (SQL) or generate a program using Oracle Warehouse Builder.

You can use a combination of data load methods for each dimension object. For example, you set up the dimension object so that it loads data using a program on a regular basis, but you can also enter data manually or load data from a text file or using Excel, if required.

To load data by using Excel, you need to first create an Excel template. Oracle Balanced Scorecard uses Oracle Web ADI to create this template. You enter data in this Web ADI Excel file, and then upload it into an interface table.

You must run the Load Data process from the Data Loader tab.

Prerequisites

- Complete the Generate Database process and ensure that no processes are scheduled. See: Generate Database, page 7-3
- Review the generated table structure. See: Generate Database, page 7-8
- Ensure that other designers and administrators are not using the dimension or locking the entire system. See: User Sessions, page 9-1

1. Navigate to Data Loader > Dimension Objects.
2. Query the dimension objects that you want to load. You can query based on Dimension Object, Table, or Interface Table name.

The screenshot shows the Oracle Performance Management Administration interface. The 'Data Loader' tab is selected. The 'Dimension Objects' section is active, displaying a search results table. The search criteria is 'suppl%' under 'Dimension Object'. The table lists several dimension objects with their respective interface tables and refresh modes.

Select	Dimension Objects	View Data Table	Interface Table	Refresh Mode	Data Load Program	Update	Create Excel
<input type="checkbox"/>	Supplier	BSC_D_CB_SUPPLIER	BSC_DI_464	Incremental			
<input type="checkbox"/>	Supplier	BSC_D_POA_SUPPLIERS_V					
<input type="checkbox"/>	Supplier Business Classification	BSC_D_POA_SUPPLIER_CLASSIFIC_V					
<input type="checkbox"/>	Supplier Site	BSC_D_POA_SUPPLIER_SITES_V					
<input type="checkbox"/>	Supplier	BSC_D_SUPPLIER	BSC_DI_126	Incremental			
<input type="checkbox"/>	Supplier Site	BSC_D_SUPPLIER_SITE	BSC_DI_247	Incremental			
<input type="checkbox"/>	Supply Categories	BSC_D_SUPPLY_CATEGORIES	BSC_DI_246	Incremental			

3. Specify a data load method for the required dimension object.

To enter data manually

1. Click View Data. You can view the data currently in the table for preseeded dimension objects as well as custom dimension objects.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database **Data Loader** Session Management Security Migration

Dimension Objects | Objectives/Reports | Interface Tables | Calendars | Requests

Data Loader: Dimension Objects >

View Data: Supplier Update Data Printable Page

Search

Search

User Code ▲	Name	Vendor Type
1	Supplier 1	Vendor Type 1
2	Supplier 2	Vendor Type 2
3	Supplier 3	Vendor Type 3
4	Supplier 4	Vendor Type 4
5	Supplier 5	Vendor Type 5

Update Data Printable Page

- Click Update Data. This option is available only for custom dimension objects.
- Enter the data in each column, as required. If necessary, you can add additional rows to the table.

Important: All listed fields presented while updating dimension objects are mandatory. User code and name are key columns and must be unique.

While adding new records for a dimension object dependent of another one, make sure the parent values exist, otherwise you cannot add the children or dependent values.

- Click Apply to save your work.

To load data from a text file

- For the selected dimension object, prepare the text file using the same format as the dimension interface table.
- Select the required dimension objects.
- Click Load Text File.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database **Data Loader** Session Management Security Migration

Dimension Objects | Objectives/Reports | Interface Tables | Calendars | Requests

Data Loader: Dimension Objects >

Load Text File Cancel Apply

Dimension Object	Table ▲	Interface Table	Source File	Remove
Supplier	BSC_D_SUPPLIER	BSC_DI_126	<input type="text"/> <input type="button" value="Browse..."/>	<input type="button" value="Remove"/>

Cancel Apply

- Select the file that you want to use to load data. The file must be a delimited text file.
- Click Apply to save your work.

To load data from a program

- For the required Dimension Object, click Update.



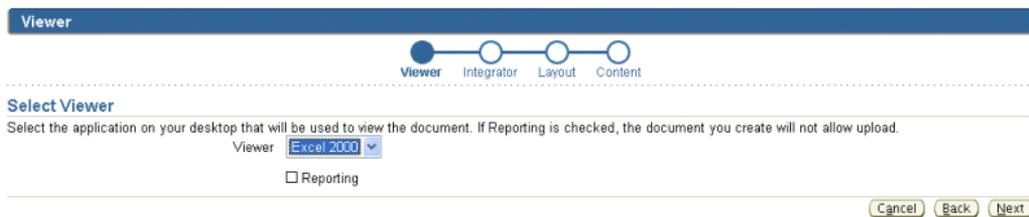
2. Select Data Load Program, and enter the program path and name.

Note: The data load program must be available from the APPS schema.

3. Click Apply to save your work.

To load data using Excel

1. For the required Dimension Object, click Create Excel. This launches the Web ADI application.



2. Select the version of Excel that you are using. If you want to view only the data in Excel, also select Reporting.
3. Click Next. The File Download dialog box appears.

The Excel template is created, and you are prompted to download it. You can open the file directly or save it.

4. Click Open. The Excel template is created, and you get a confirmation message.

Caution: The process of downloading and creating the template might take some time. Wait until you get the confirmation message.

5. Click Close.

The Excel template appears, displaying the structure of the dimension object interface table and the existing data.

6. Enter new data or update existing data.

Ten rows are visible by default, but you can add more rows. To do that, unprotect the sheet and then add new rows.

After you enter data, you need to upload it in the database. If you want to upload data only for the selected rows, you need to flag these rows. To do that, double-click in the Upl column for the required row.

7. From the Oracle menu, select Upload. The Upload Parameters window appears.
8. From the Rows to Upload list, select the required option. You can choose to upload only flagged rows or all rows.
9. From the Duplicate Records list, select the required option.
10. Click Upload. The window displays the progress of the upload process. You will get a conformation message.
11. Click Close.

The Excel sheet displays an appropriate message for each row that you try to upload.

12. Close Excel without saving the template.

To load dimension objects:

1. Ensure that your session is active and you are on the Dimension Objects page.
2. Validate and update the refresh mode for the dimension object you want to load. To change the refresh mode, select update, then choose one of the following modes
 - Incremental: Choose this mode to add new records and update the existing records that matches the user code.
 - Full: Choose this mode to remove and replace the dimension object content with only the information provided in this load. It will delete the previous values in the dimension object.
3. Select the dimension objects that you want to load.
4. Click Refresh Dimension Objects to start the Data Loader - Refresh Dimension Objects by Interface Table request.



5. Review and modify the list of dimension objects that are being updated, and then click Continue.
6. Schedule the request to run immediately or for later, to be run once or periodically. Also, set up notifications as required.

The list of available recipients is based on the users that are defined in Oracle Workflow. Users will receive one notification for each dimension object that is loaded.

7. Click Finish to submit the Data Loader - Refresh Dimension Objects by Interface Table request.

Use the resulting request ID to monitor the request using the Requests subtab or the Concurrent Manager.

Load Interface Tables

To load data for interface tables of objectives and generated source reports, specify one of the following data load methods:

- Load data from a text file
- Load data using a program
- Load data using Excel

No load programs are provided with Oracle Balanced Scorecard. Therefore, if you want to use a program to load data, you must create that program using SQL, or generate a program using Oracle Warehouse Builder.

You can use a combination of data load methods. For example, you set up the interface table so that it loads data using a program on a regular basis, but you can also load data from a text file or using Excel, if required.

To load data using Excel, you need to first create an Excel template. Oracle Balanced Scorecard uses Oracle Web ADI to create this template. You enter data in this Web ADI Excel file, and then upload it into an interface table.

You must run the Load Data process from the Data Loader tab.

Prerequisites

- Complete the Generate Database process for your objectives. See: Generate Database, page 7-3
 - Review the generated table structure. See: Generate Database, page 7-8
 - Ensure that other designers and administrators are not working on your interface tables or locking the entire system. See: User Sessions, page 9-1
1. Navigate to Data Loader > Interface Tables.
 2. Query the tables that you want to load.

Search

Select Interface Tables: Previous 1-25 Next 25

Select All | Select None

Select	Table Name	Calendar	Period	Year Last Update	Data Load Program	Update	Create Excel
<input type="checkbox"/>	BSC_I_10	Bsc Gregorian	Month	2003 January (1)			
<input type="checkbox"/>	BSC_I_102	Bsc Gregorian	Month	2003 January (1)			
<input type="checkbox"/>	BSC_I_1027	Bsc Gregorian	Month	2003 January (1)			
<input type="checkbox"/>	BSC_I_1028	DBI Enterprise Calendar	Day	2006 01-JAN-06 (1)			
<input type="checkbox"/>	BSC_I_1029	DBI Enterprise Calendar	Day	2006 01-JAN-06 (1)			
<input type="checkbox"/>	BSC_I_103	Bsc Gregorian	Month	2003 January (1)			
<input type="checkbox"/>	BSC_I_1030	DBI Enterprise Calendar	Day	2006 01-JAN-06 (1)			
<input type="checkbox"/>	BSC_I_1031	DBI Enterprise Calendar	Day	2006 01-JAN-06 (1)			
<input type="checkbox"/>	BSC_I_1033	DBI Enterprise Calendar	Day	2006 01-JAN-06 (1)			
<input type="checkbox"/>	BSC_I_1035	DBI Enterprise Calendar	Day	2006 01-JAN-06 (1)			
<input type="checkbox"/>	BSC_I_1036	Bsc Gregorian	Month	2003 January (1)			
<input type="checkbox"/>	BSC_I_1037	Bsc Gregorian	Month	2003 January (1)			
<input type="checkbox"/>	BSC_I_1038	Bsc Gregorian	Month	2003 January (1)			
<input type="checkbox"/>	BSC_I_1039	Bsc Gregorian	Quarter	2003 January-March (1)			
<input type="checkbox"/>	BSC_I_1044	Bsc Gregorian	Quarter	2003 January-March (1)			
<input type="checkbox"/>	BSC_I_1046	Bsc Gregorian	Month	2003 January (1)			
<input type="checkbox"/>	BSC_I_1047	Bsc Gregorian	Month	2003 January (1)			
<input type="checkbox"/>	BSC_I_1048	Bsc Gregorian	Month	2003 January (1)			

3. Specify a data load method for the required table. You can choose one of the following methods:
 - Manual: Data Loader will expect the information in the interface table. Data is loaded manually by user into the interface table, using a data entry program, a text file, an Excel file or custom procedures not specified in the Data Load program.
 - Data Load Program: Data is loaded while Data Loader program is processed by executing the program or procedure specified by user for the interface table. Using this method, the system will clean the data in the interface table prior to run the data load program specified by user.

To load data from a text file

1. Prepare the text file using the same format as the interface table. Provide the user code for each of the dimension object columns of the interface table.
2. Select the required tables.
3. Click Load Data from Text File.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setup Database **Data Loader** Session Management Security Migration

Dimension Objects | Objectives/Reports | **Interface Tables** | Calendars | Requests

Data Loader Interface Tables >

Load Text File Cancel Apply

Interface Table	Source File	Remove
BSC_I_10	<input type="text"/> <input type="button" value="Browse..."/>	

Cancel Apply

4. Select the file that you want to use to load data. The file must be a delimited text file.
5. Click Apply to save your work.

To load data from a program

1. For the required table, click Update.
2. Select Data Load Program, and enter the program path and name.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database **Data Loader** Session Management Security Migration

Dimension Objects | Objectives/Reports | **Interface Tables** | Calendars | Requests

Data Loader Interface Tables >

Update: BSC_I_10 Cancel Apply

Interface Table **BSC_I_10**

Source Type Manual Data Load Program

Cancel Apply

Note: Make sure the data load program specified is available under the APPS schema.

3. Click Apply to save your work.

To load data using Excel

1. For the required table, click Create Excel. This launches the Oracle Web ADI application.

Viewer

Viewer Integrator Layout Content

Select Viewer

Select the application on your desktop that will be used to view the document. If Reporting is checked, the document you create will not allow upload.

Viewer

Reporting

Cancel Back Next

2. Select the version of Excel that you are using. If you want to only view the data in Excel, also select Reporting.
3. Click Next. The File Download dialog box appears.

The Excel template is created, and you are prompted to download it. You can open the file directly or save it.

4. Click Open. The Excel template is created, and you get a confirmation message.

Caution: The process of downloading and creating the template might take some time. Wait till you get the confirmation message.

5. Click Close.

The Excel template appears, displaying the structure of the interface table and the existing data.

6. Enter new data, or update existing data.

Ten rows are visible by default, but you can add more rows. To do that, unprotect the sheet and then add new rows.

After you enter data, you need to upload it in the database. If you want to upload data only for the selected rows, you need to flag these rows. To do that, double-click in the Upl column for the required row.

7. From the Oracle menu, select Upload. The Upload Parameters window appears.
8. From the Rows to Upload list, select the required option. You can choose to upload only flagged rows or all rows.
9. From the Duplicate Records list, select the required option.
10. Click Upload. The window displays the progress of the upload process. You will get a conformation message.
11. Click Close.

The Excel sheet displays an appropriate message for each row that you try to upload.

12. Close Excel without saving the template.

To load interface tables:

1. Ensure that your session is active and you are on the Interface Tables page.
2. Select the interface tables that you want to load.
3. Click Refresh Summaries to start the Data Loader - Refresh Summaries by Interface Tables concurrent program.



4. The Refresh Related Dimension Objects option is selected by default. This refreshes any dimension objects that are related to the selected interface tables.

Deselect this option if you do not want to refresh related dimension objects.

Note: If the selected interface tables have been generated using the Analytic Workspaces implementation type, you should refresh related dimension objects.

5. Review the list of interface tables that are being refreshed, and then click Continue.
6. Schedule the process to run immediately or for later, to be run once or periodically. Also, set up notifications as required.

The list of available recipients is based on the users that are defined in Oracle Workflow. Users will receive one notification for each table that is refreshed.

- Click Finish to submit the Data Loader - Refresh Summaries by Interface Table request.

Use the resulting request ID to monitor the request using the Requests subtab or the Concurrent Manager.

Load Objectives or Reports

When you load data for objectives or generated source reports, you also can refresh related dimension objects, or related objectives and generated source reports.

Prerequisites

- Complete the Generate Database process for your objectives. See: Generate Database, page 7-3
- Review the generated table structure. See: Generate Database, page 7-8
- Ensure that other designers and administrators are not working on your objectives or locking the entire system. See: User Sessions, page 9-1

To load objectives or reports:

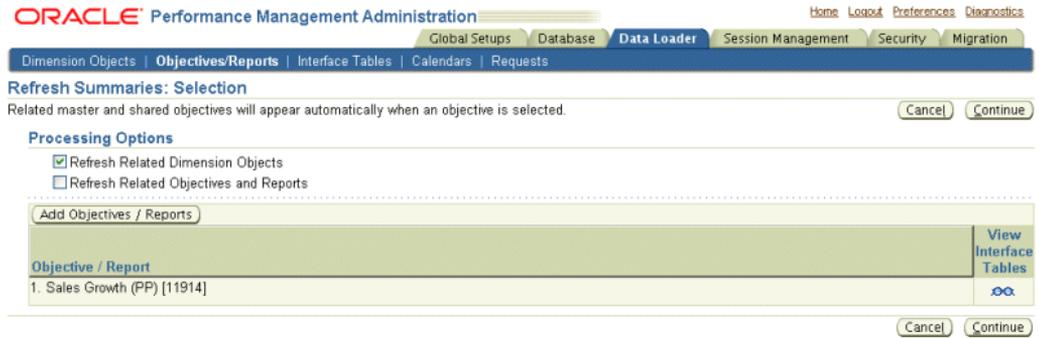
- Navigate to Data Loader > Objectives/Reports.
- Query the objectives or reports that you want to load.

Make sure you have uploaded data or associated a data load program to the corresponding interfaces tables of the selected objectives or reports, before refreshing summaries. Otherwise, the Data Loader will not process any new records. To find out the interface tables associated to an objective or report, see: Review Objectives/Reports and Tables Documentation, page 7-8.

The screenshot shows the Oracle Performance Management Administration interface. The top navigation bar includes links for Home, Logout, Preferences, and Diagnostics. Below this, there are tabs for Global Setups, Database, Data Loader, Session Management, Security, and Migration. The main content area is titled 'Objectives / Reports' and features a search bar with a dropdown menu set to 'Objective' and a search term '%sales%'. Below the search bar, there are buttons for 'Select Objectives / Reports', 'Refresh Summaries', and 'Delete Data'. A table lists various objectives with columns for Select, Name, Calendar, Period, Year, and Last Update.

Select	Name	Calendar	Period	Year	Last Update
<input type="checkbox"/>	1. Sales Growth (PP) [11914]	ADP Calendar	Month	2006	April (1)
<input type="checkbox"/>	AA Increase Sales [10442]	Bsc Gregorian	Month	2003	January (1)
<input type="checkbox"/>	Days Sales Outstanding [3375]	Bsc Gregorian	Month	2003	January (1)
<input type="checkbox"/>	Days Sales Outstanding [6941][3375]	Bsc Gregorian	Month	2003	January (1)
<input type="checkbox"/>	Develop Strategic Sales and Service Skills [3277]	Bsc Gregorian	Month	2003	January (1)
<input type="checkbox"/>	Enhance Sales Team Productivity & Cross Selling [3190]	Bsc Gregorian	Month	2003	January (1)
<input type="checkbox"/>	Improve Sales Productivity [3767]	Bsc Gregorian	Month	2003	January (1)
<input type="checkbox"/>	Increase Average Sales per Customer [3757]	Bsc Gregorian	Month	2003	January (1)
<input type="checkbox"/>	Increase New Customer Sales [3780]	Bsc Gregorian	Month	2003	January (1)

- Click Refresh Summaries to start the Data Loader - Refresh Summaries by Objectives concurrent program.



4. The Refresh Related Dimension Objects option is selected by default. This refreshes any dimension objects that are related to the selected interface tables.

Clear this option if you do not want to refresh related dimension objects.

Note: If the database for the selected objectives or generated source reports has been generated using the Analytic Workspaces implementation type, you should refresh related dimension objects.

5. Select the Refresh Related Objectives and Reports option if you want to refresh the objectives or reports that share common tables with the selected objectives or reports.
6. Review the list of objectives or generated source reports that are being refreshed, and then click Continue.
7. Schedule the process to run immediately or for later, to be run once or periodically. Also, set up notifications as required.

The list of available recipients is based on the users that are defined in Oracle Workflow. Users will receive one notification for each objective that is refreshed.

8. Click Finish to submit the Data Loader - Refresh Summaries by Objectives concurrent program.

Use the resulting request ID to monitor the request using the Requests subtab or the Concurrent Manager.

Delete Objective or Report Data

You can delete data for objectives and generated source reports, if required. This feature is useful if you entered some data for testing purposes that you no longer need.

To delete objective or report data:

1. Navigate to Data Loader > Objectives/Reports.
2. Query and then select the objectives or generated source reports that you want to delete.
3. Click Delete Data.

A warning message indicates which other objectives and generated source reports will be affected if you delete the data. Affected objectives and reports share a common table with the objective or reports for which you are deleting data.

4. Click Yes to confirm that you want to delete the data.

Advance Calendar

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database **Data Loader** Session Management Security Migration

Dimension Objects | Objectives/Reports | Interface Tables | **Calendars** | Requests

Calendars

Calendar	Type	Data Range	Current Year	Advance Current Year
Bsc Gregorian	Pre-Defined	2005	2005	
DBI Enterprise Calendar	Pre-Defined	2006	2006	
DBI Gregorian Calendar	Pre-Defined	2006	2006	
DBI Period 445 Calendar	Pre-Defined	2006	2006	
Kaudet	Custom	2001	2001	
School Year	Custom	2003	2004	
University Fiscal Year	Custom	2004	2005	

In Balanced Scorecard, viewers can only view actual data for the current year of the corresponding calendar. As a result, whenever you want to load actual data for a new year, you must advance the current year for the corresponding calendar.

You should also note that not all objectives use the same calendar and that not all calendars use the same current year.

To advance calendars:

- Navigate to Data Loader > Calendars. The Calendar window displays the list of available calendars and displays the following information for each calendar:
 - Calendar:** Calendar name.
 - Type:** Predefined calendars are preseeded with Balanced Scorecard. Custom calendars are defined by the designers.
 - Data Range:** The time range that is used by each calendar.
 - Current Year:** The year up to which the system currently accepts actual data. For any year beyond the current year, the system will accept prototype or benchmark data. Note that the current year may not actually reflect the current system year.

For custom calendars, the system deletes the oldest year data and creates entries for the new year.

Update preseeded calendars using Daily Business Intelligence.

- Click Advance Current Year to update the calendar by one year.

A warning message indicates which other objectives will be affected if you delete the data. Affected objectives share a common table with the objective for which you are deleting data.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database **Data Loader** Session Management Security Migration

Dimension Objects | Objectives/Reports | Interface Tables | **Calendars** | Requests

Warning

Advance Current Year - Bsc Gregorian
 You are changing the current year to 2006. After this process finishes, you will be able to upload actual data for all objectives using this calendar.

Do you want to proceed?

- Click Yes to confirm that you want to delete the data.

You must refresh your data for objectives and objective interface tables after you advance the calendar.

Related Topics

For more information about updating preseeded calendars, see: *Initial and Incremental Request Sets* in *Oracle Daily Business Intelligence Implementation Guide*.

Monitor Requests

To monitor the status of a Load Data process, navigate to Data Loader > Requests. The Requests subtab displays the list of submitted programs, the date submitted, the current status, phase of the process, and the request ID. It also provides links to the program details and output files. You can use this subtab to view the pending and completed processes, or to search for a particular request.

If a request completes with a warning or an error, check the log file to review the details of the issue that caused the problem, or click View Invalid Records to see the list of invalid records. Fix the issues listed or invalid codes and rerun the request.

You can also use the Concurrent Manager to monitor the status of any request.

Related Topics

Oracle Applications System Administrator Guide.

User Sessions

Manage Multiple User Sessions

Before you run the Migration or Generate Database for all objectives, designers and administrators must exit Balanced Scorecard. Viewers do not need to exit Balanced Scorecard; however, they can only view prototype data while these processes are running.

You cannot terminate designer or administrator sessions. Use the Session Management feature to identify which users are logged in as designers or administrators and notify those users to exit Balanced Scorecard.

1. Log into Oracle Applications using the Performance Management Administrator responsibility.
2. Navigate to Session Management. You can view the active sessions.
3. Click Show All Locks to view all of the sessions that currently have data locked.
4. Click Details to view the details of a particular session.
5. Notify the active Designers or Administrators to log off the system when required.

This chapter covers the following topics:

- Overview of Migrating Balanced Scorecard Systems
- Migrate Systems

Overview of Migrating Balanced Scorecard Systems

Migrate a Balanced Scorecard system if you want to copy information from one Balanced Scorecard instance (source system) to another instance (target system).

When you migrate data, the data in the target system is *overwritten* by the data from the source system. You cannot merge data from different system into the target system using migration. However, you can use the copy functionality available from Builder to merge objectives from different instance.

There are three ways to migrate Balanced Scorecard systems:

- **All Scorecards and Objectives in System:** Migrates the entire system.
- **Selected Scorecards:** Migrates specific scorecards as well as the objectives and other data associated with those scorecards.
- **Selected Objectives:** Migrates specific objectives and the data associated with these objectives.

Before you migrate a Balanced Scorecard system, ensure the following prerequisites:

- Source and target systems exist.
- Balanced Scorecard are installed in the source and target systems.
- Both source and target instances use the same Balanced Scorecard release.

Migrate Systems

To start the migration process, get online on the target system. Then to migrate data to the target system:

1. Select the source system.
2. Map responsibilities between the source system and the target system.
3. Select migration options.
4. Select objects to be migrated.

5. Run or schedule the migration process run.

Select Source System

The first step to submit a migration process is the selection of the source system. To do that, you need to first establish a connection with the source system.

To create a new connection with the source system:

1. Log in to Oracle Applications using the Performance Management Administrator responsibility.
2. Navigate to Migration.
3. Click Schedule Migration Process.
4. Click Create New Connection. This opens the Create Connection page. Enter information in the following sections:
 - **General Attributes:** Enter a name and description for the new connection.
 - **Source System Information:** Enter details about the source system, such as name, host name, SID, and port number.
 - **Schema Information:** Enter the APPS password for the source in order to test the connection.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database Data Loader Session Management Security Migration

Create Connection
* Indicates required field Cancel Apply

General Attributes

* Name
Description

Source System Information

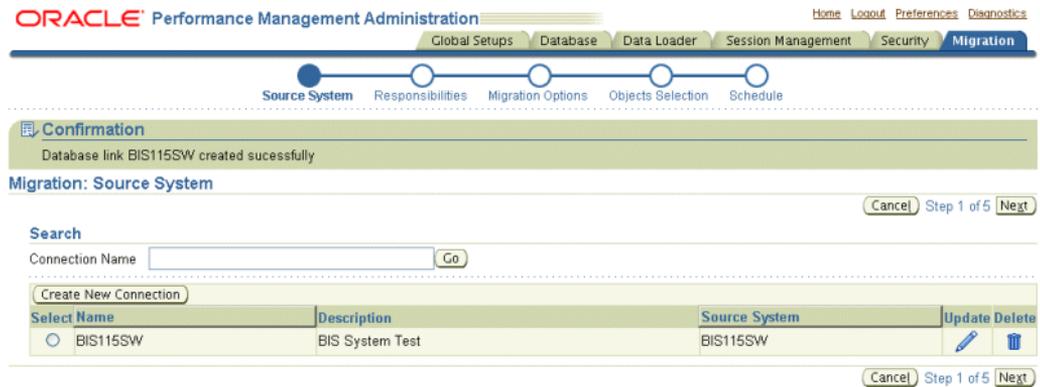
* Name
* Host Name
* SID
* Port Number

Schema Information

Schema Name
* Password

Cancel Apply

5. Click Apply to immediately validate the database connection with the source system and add it to the list of available connections.



After you create a connection, you can update the connection or select it to start the migration process.

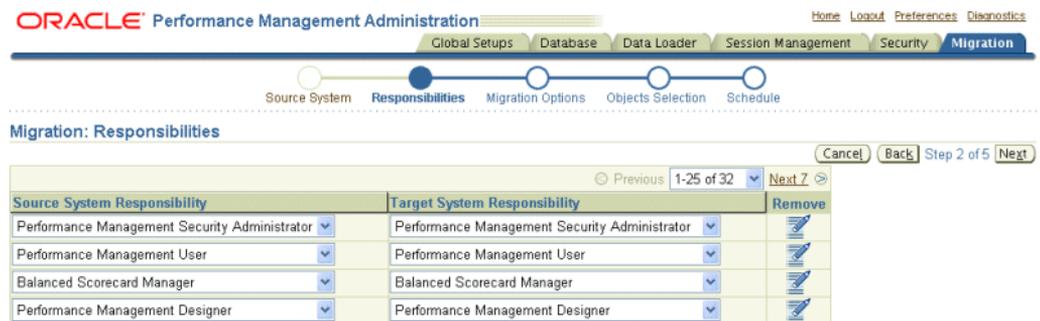
However, before that ensure that there is no other migration process running or scheduled because only one migration process can be configured at one time. If you start configuring a second migration process when another migration process is pending, the first process is put on hold. If you submit the second migration process, the first migration process, which is pending is terminated.

When configuring the second migration process using the same source system as the pending process, the system will present the options used in the pending migration process, by default.

Map Responsibilities

After you select the database connection to use as source system for the migration process, you need to map the responsibilities from where you want to migrate objects.

The Responsibilities page displays the list of available Balanced Scorecard designer and administration responsibilities on the source system, and maps all these responsibilities with the responsibilities in the target system. For example, the Performance Management User responsibility in the source system is mapped to the Performance Management User responsibility in the target system. If you do not want to map any of these responsibilities, you can remove them.



All remaining responsibilities that do not match across both instances appear listed in the corresponding lists, but are not mapped by default. If required, you can map each of these responsibilities manually or not map them at all.

Select Migration Options

The third step of the migration process is to select the required migration options. You need to select one option each from the Strategic Information and Descriptive Information sections.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

Global Setups Database Data Loader Session Management Security Migration

Source System Responsibilities Migration Options Objects Selection Schedule

Migration: Migration Options Cancel Back Step 3 of 5 Next

Strategic Information
This option allows to migrate the definition and fact data for the following objects

- All Scorecards and Objectives in System
- Selected Scorecards
- Selected Objectives

Descriptive Information
This option allows to migrate all descriptive Information found under "Information", "Comments" and "Assessments" tabs in Balanced Scorecard.

- Migrate information from Source System
- Keep information from Target System
- Remove all information from Target System after migration completes

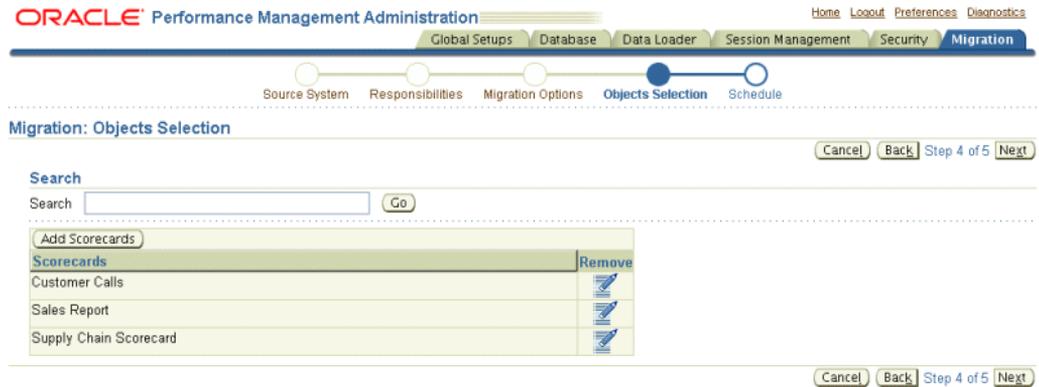
Cancel Back Step 3 of 5 Next

- **Strategic Information**
 - **All Scorecards and Objectives in System:** Migrate definition and data of all scorecards and objectives from the source system to the target system.
 - **Selected Scorecards:** Migrate only selected scorecards and all the underlying objectives and objects related to the selected scorecards.
 - **Selected Objectives:** Migrate only selected objectives and all the underlying objects related to the selected objectives.
- **Descriptive Information**
 - **Migrate information from Source System:** Migrate information contained as additional content of objectives, such as definition, formulas, strategy, action items, objective owner, related links, assessments, collaboration, and launchpad definition, which helps users to understand the nature and data of the objectives defined in the source system.
 - **Keep information from Target System:** Do not migrate information contained as additional content of objectives from the source system and keep the existing information of the target system.
 - **Remove all information from Target System after migration completes:** Do not migrate information from the source system and remove the additional content information, such as comments and assessments, from the target system.

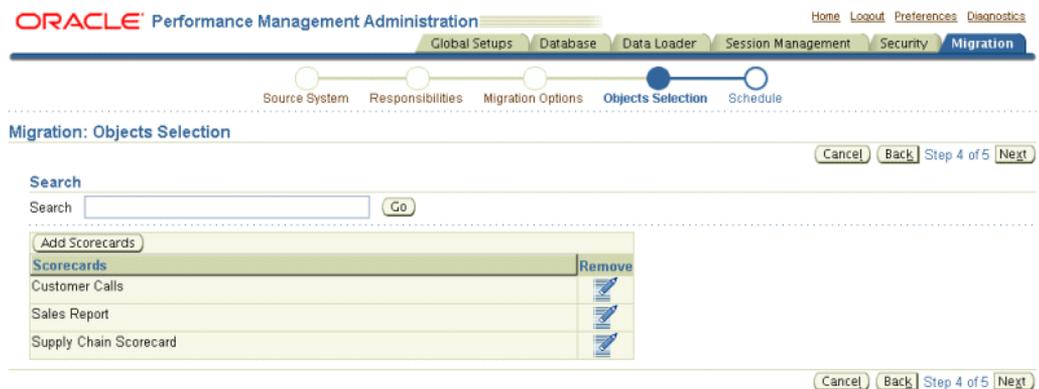
Select Objects

Depending on the migration type that you select in the Strategic Information section on the Migration Options page, you need to select the objects to be migrated as follows:

- **All Scorecards and Objectives in System:** Displays the entire list of scorecards available on the source system.
- **Selected Scorecards:** Displays an empty list. You need to add the scorecards that you want to migrate.



- **Selected Objectives:** Displays an empty list. You need to add the objectives that you want to migrate.



Run or Schedule Migration



The last step in the migration process is to run the process or schedule it for a later date and time.

On the Schedule page you can add the name of any existing users in the target system to get a notification upon completion of the migration process. The notifications can be sent based on the status of the migration process, which can be Normal, Warning, or Error.

Click Finish to execute or schedule the migration request.

Review Migration Process Results

Once the migration process is over, you can review the log file for detailed results.

To view log files:

1. Navigate to Performance Management Administrator > Migration
2. Select the migration request that you want to review and click Details.
3. Select View Log. The log file opens.

Scroll down to the bottom of the log to search for any errors or warning messages. Fix the errors and submit the process again, if required.

You can also review the output file for detailed information on the results.

Important: Migration finishes with warning messages when pre-seeded content associated to the selected objectives or scorecards is not found in the target system. To avoid this issue, apply the same Oracle delivered content (pre-seeded content) in both instances prior to the migration.

