

Oracle® Balanced Scorecard

Administrator Guide

Release 12

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Oracle Balanced Scorecard Administrator Guide, Release 12

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Contents

Send Us Your Comments

Preface

1 Introduction

Balanced Scorecard Methodology.....	1-1
Balanced Scorecard Perspectives	1-2
Oracle Balanced Scorecard.....	1-3
Overview of Designing Scorecards.....	1-7
Overview of Administering Scorecards.....	1-8

2 Scorecards

Overview of Creating Scorecards.....	2-2
Create Scorecards and Scorecard Hierarchies.....	2-4
Add Objectives.....	2-6
Add Simulations.....	2-8
Enable Views.....	2-9
Create Custom Views.....	2-11
Create Launchpads.....	2-16
Enable Additional Information Column.....	2-18
Configuring the Scorecard View.....	2-18
Formatting Directional Lines.....	2-19
Configuring the Strategy View.....	2-20
Defining Filters to a Scorecard.....	2-21
Defining Common Dimension at Scorecard Level.....	2-23
Assign Responsibility to Users at Scorecard Level.....	2-25

3 Objectives

Overview of Creating Objectives.....	3-2
Create KPIs.....	3-4
Create Data Source Groups.....	3-10
Create Dimensions.....	3-11
Create Objectives.....	3-18
Create Profit and Loss.....	3-46
Create Custom Calendars and Periods.....	3-48
Defining Other Objective Properties - Architect.....	3-51
Create Dashboards and Reports.....	3-64

4 Simulation

Create Simulations.....	4-1
-------------------------	-----

5 Portlets

Balanced Scorecard Portlets.....	5-1
Objective Graph Portlet.....	5-1
List of Objectives Portlet.....	5-3
Custom View Portlet.....	5-5
Multiple User Support.....	5-6
Grant Access to a Balanced Scorecard Portlet.....	5-8

6 Security

Assign Responsibilities to Users.....	6-1
Assign Scorecards to Users.....	6-2
Assign Roles to Designers.....	6-5

7 Set Up

Set Up Global Parameters.....	7-1
-------------------------------	-----

8 Generate Database

Overview of Generating the Database	8-1
View Current Status.....	8-3
Run the Generate Database Process.....	8-4
Review Components and Tables Documentation.....	8-10
Monitor Requests.....	8-12
Generate Database Data Roll Up Methodology.....	8-12
Troubleshooting.....	8-15

9 Data Loader

Overview of Loading Data.....	9-1
Load Dimension Objects.....	9-2
Load Interface Tables.....	9-8
Load Objectives, Simulations, or Reports.....	9-13
Delete Objective, Simulation or Report Data.....	9-16
Advance Calendar.....	9-16
Monitor Requests.....	9-18

10 User Sessions

Manage Multiple User Sessions.....	10-1
------------------------------------	------

11 Migration

Overview of Migrating Balanced Scorecard Systems.....	11-1
Migrate Systems.....	11-2

Index

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Oracle Balanced Scorecard Administrator Guide, Release 12

Part No. B25164-03

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Preface

Intended Audience

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

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

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

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

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

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Structure

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

Related Information Sources

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

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

Online Documentation

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

- **PDF** - PDF documentation is available for download from the Oracle Technology Network at <http://otn.oracle.com/documentation>.
- **Online Help** - Online help patches (HTML) are available on *OracleMetaLink*.
- **Oracle MetaLink Knowledge Browser** - The *OracleMetaLink* Knowledge Browser lets you browse the knowledge base, from a single product page, to find all documents for that product area. Use the Knowledge Browser to search for release-specific information, such as FAQs, recent patches, alerts, white papers, troubleshooting tips, and other archived documents.

Related Guides

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

Oracle Applications Installation Guide: Using Rapid Install:

This guide provides information about using the Rapid Install utility to install Oracle Applications Release 12, or as a part of an upgrade from Release 11i to Release 12. Discusses Standard and Express installations, fresh or Vision Demo database installations, as well as techstack and product upgrades.

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

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

Oracle Applications Patching Procedures:

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

Oracle Applications Maintenance Utilities:

This guide describes how to run utilities, such as AD Administration and AD Controller, used to maintain the Oracle Applications file system and database. Outlines the actions performed by these utilities, such as monitoring parallel processes, generating Applications files, and maintaining Applications database entities. Part of *Maintaining Oracle Applications*, a 3-book set that also includes *Oracle Applications Patching Procedures* and *Oracle Applications Maintenance Procedures*.

Oracle Applications Maintenance Procedures:

This guide describes how to use AD maintenance utilities to complete tasks such as

compiling invalid objects, managing parallel processing jobs, and maintaining snapshot information. Part of Maintaining Oracle Applications, a 3-book set that also includes Oracle Applications Patching Procedures and Oracle Applications Maintenance Utilities.

Oracle Balanced Scorecard User Guide:

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

Oracle Balanced Scorecard Install Guide:

This guide describes how to how to install the Balanced Scorecard Architect components.

Oracle Daily Business Intelligence Implementation Guide:

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

Oracle Daily Business Intelligence User Guide:

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

Oracle Embedded Data Warehouse User Guide:

This guide describes how to use Embedded Data Warehouse reports and workbooks to analyze performance.

Oracle Embedded Data Warehouse Implementation Guide:

This guide describes how to implement Embedded Data Warehouse, including how to set up the intelligence areas.

Oracle Embedded Data Warehouse Install Guide:

This guide describes how to install Embedded Data Warehouse, including how to create database links and create the end user layer (EUL).

Integration Repository

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

Introduction

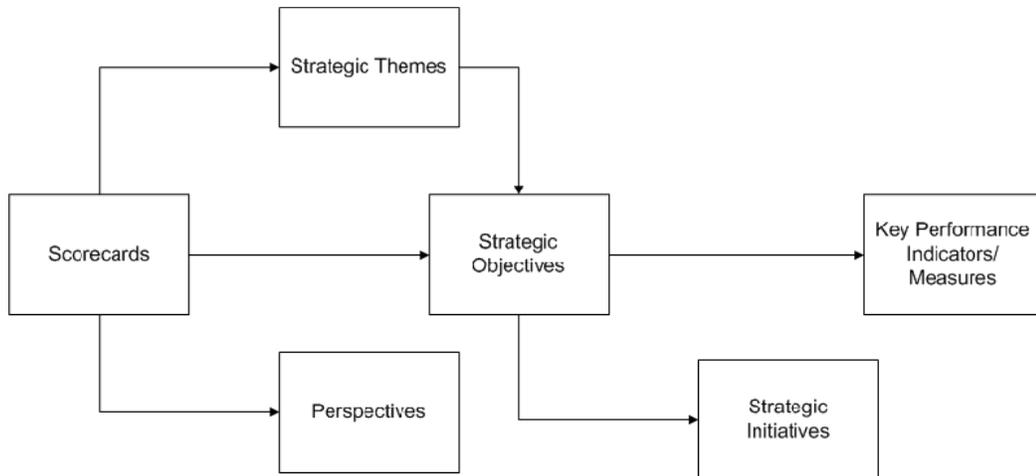
This chapter covers the following topics:

- 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.



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. However, Balanced Scorecard can be used to represent any strategic methodology using scorecards.

Balanced Scorecard enables companies to represent their strategy in scorecards that are supported by objectives and KPIs and use those scorecards to measure performance.

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.

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.
- **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:** A group of objectives. Objective groups are used to organize content into perspectives such as financial, customer, internal, or learning.
- **Perspective:** The categories within which you classify KPIs and strategic components. Usually, four perspectives are available: financial, customer, internal, and learning. Depending on the configuration, some scorecard views display assessments that are grouped by perspective.

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

- **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 objective color method determines the status of the objective. KPIs can be preseeded or created by the scorecard designer.
- **Goal Type:** Indicates the direction the improvement of a KPI is desired. Balanced Scorecard supports three goal types: target met above plan, target met below plan, and target met within ranges.

Note: Goal type was previously referred to as Color Method.

- **Alarm:** Indicates the status of an objective or KPI. The possible statuses are good, acceptable, marginal, unacceptable, or critical.

The alarm status for a KPI status is based on how the KPI falls within a set of defined tolerance ranges for the KPI's expected performance. For example, if Revenue decreases by more than 5%, then the Revenue KPI 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 objective color method determines the alarm status of the objective.

- **Trend:** Indicates the change in actual value of a KPI or objective over previous periods. The possible changes are acceptable decrease, acceptable increase, unacceptable increase, unacceptable decrease, no change, and no data. You cannot view trends for preseeded KPIs. The alarm color method chosen for an objective determines the objective trend.
- **Simulation:** "What if" scenarios that demonstrate the cause and effect relationship across selected KPIs.
- **Strategic Components:** Collectively, the objectives, reports, and simulations available in Balanced Scorecard are referred to as "strategic components."
- **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:

- **Tree view:** It lists the perspectives or strategic themes, objectives, and KPIs of the scorecard organized into a tree like structure. This view also shows alarms and trends for KPIs and objectives.
- **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. This view also shows alarms and trends for KPIs and objectives. The detailed view displays the underlying data for each objective and KPI including: Actual, Plan, Variation, and Percent of Plan data. This view enables interpretation on how the alarms and trends are calculated for each objective and KPI.
- **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 and KPIs, the goal types for KPIs, and enables trends for KPIs..

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
 - Configuring Strategy View
- Objective
 - Export to Excel

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 Strategic Components
 - Review Tables
 - Monitor Requests
- Data Loader
 - Dimension Objects
 - Strategic Components
 - 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
- Add Simulations
- Enable Views
- Create Custom Views
- Create Launchpads
- Enable Additional Information Column
- Configuring the Scorecard View
- Formatting Directional Lines
- Configuring the Strategy View
- Defining Filters to a Scorecard
- Defining Common Dimension at Scorecard Level
- Assign Responsibility to Users at Scorecard Level

Overview of Creating Scorecards

The screenshot shows the Oracle Balanced Scorecard Administrator interface for Swift Corp. The page title is "Vision Enterprises" and the data is last updated on 30-Jul-2007. A dropdown menu is set to "Scorecard View". The main content area displays a list of objectives for "Vision Enterprises" and two strategy groups: "Purchasing KPI group" and "Vision Gross Profit Strategy".

Objective	Status	Link
Increase Operating Margin	↑	Increase Operating Margin
Reduce Expenses	↓	Reduce Expenses
Increase Average Sales per Customer	↔	Increase Average Sales per Customer
Improve Customer Satisfaction	+	Improve Customer Satisfaction
Improve Delivery Performance	↑	Improve Delivery Performance
Improve Customer Support	↓	Improve Customer Support
Improve Product Quality	↔	Improve Product Quality
Optimize Inventory Deployment	!	Optimize Inventory Deployment
Capture Savings Opportunities	↑	Capture Savings Opportunities
Improve Supplier Price Performance	+	Improve Supplier Price Performance
Aggregate Purchasing	↓	Aggregate Purchasing
Improve Sales Productivity	↑	Improve Sales Productivity
Optimize leads Generation	!	Optimize leads Generation
Remove non Value Activities	✓	Remove non Value Activities
Develop Employee Skills	↑	Develop Employee Skills

Strategy Group	Objective	Status	Link
Purchasing KPI group	Purchasing Compliance	✗	Purchasing Compliance
	Optimize Inventory Management	+	Optimize Inventory Management
Vision Gross Profit Strategy	Profit Margin Simulation	✓	Profit Margin Simulation

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 Objectives and Simulations.
- 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. You can also add logos to each scorecard when creating a scorecard.

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.

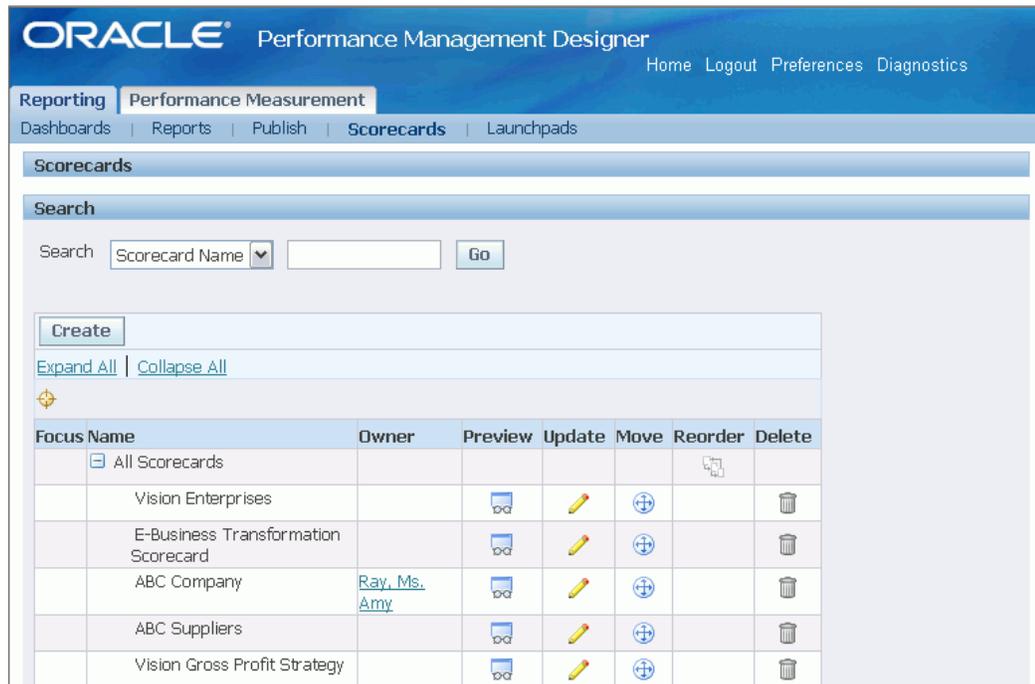
The designer, and in some cases the administrator, can perform the following scorecard-specific tasks:

1. Create Scorecards and Scorecard Hierarchies, page 2-2
2. Add Objectives, page 2-6
3. Add Simulations, page 2-8
4. Enable Views, page 2-9
5. Create Custom View, page 2-11
6. Create Launchpads, page 2-16
7. Enable Additional Information Column, page 2-18
8. Configuring the Scorecard View, page 2-18
9. Configuring the Strategy View, page 2-20
10. Defining Filters to a Scorecard, page 2-21
11. Defining Common Dimension at Scorecard Level, page 2-23
12. Assign Responsibility to Users at Scorecard Level, page 2-25

Related Topics

Oracle Balanced Scorecard User Guide

Create Scorecards and Scorecard Hierarchies



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

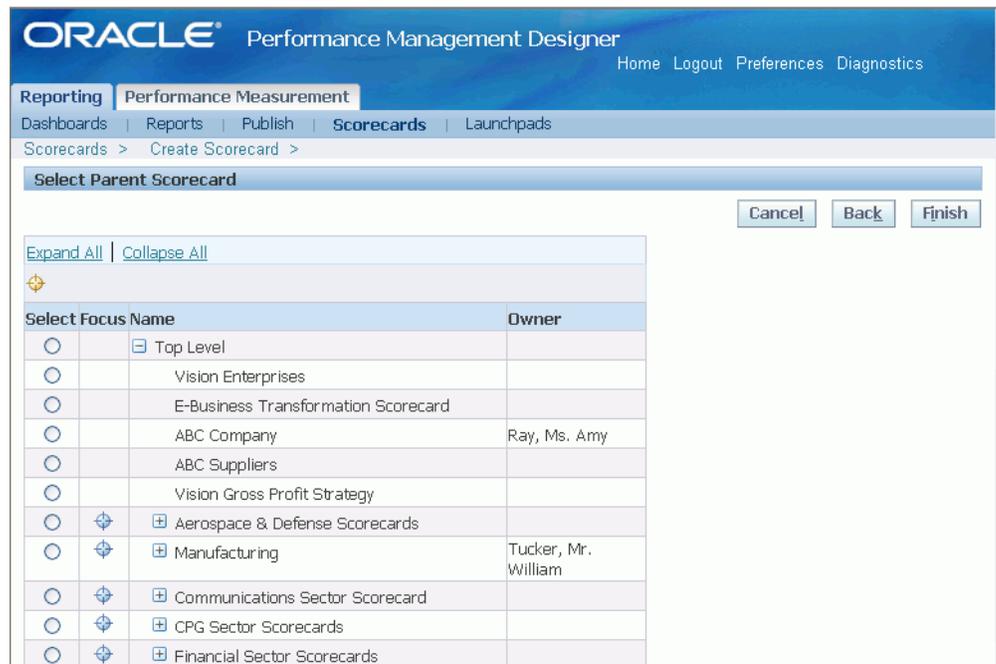
Applications user with a Balanced Scorecard responsibility assigned and a defined e-mail address.

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. Provide additional information, if any.
6. You can add a scorecard logo if required and click Continue.

The scorecard logo must be either a GIF or JPG image. The maximum recommended size for the image is 340 (width) X 100 (height). The scorecard logo applies to all objectives and simulations reports that are part of the scorecard. If you do not configure any scorecard logo, the company logo as configured by the Balanced Scorecard administrator in the Global Setup window takes precedence. You can at any point of time update the primary attributes of the scorecard and attach a logo. You can also reset scorecard logo and use the default company logo. To reset logo, click Reset.

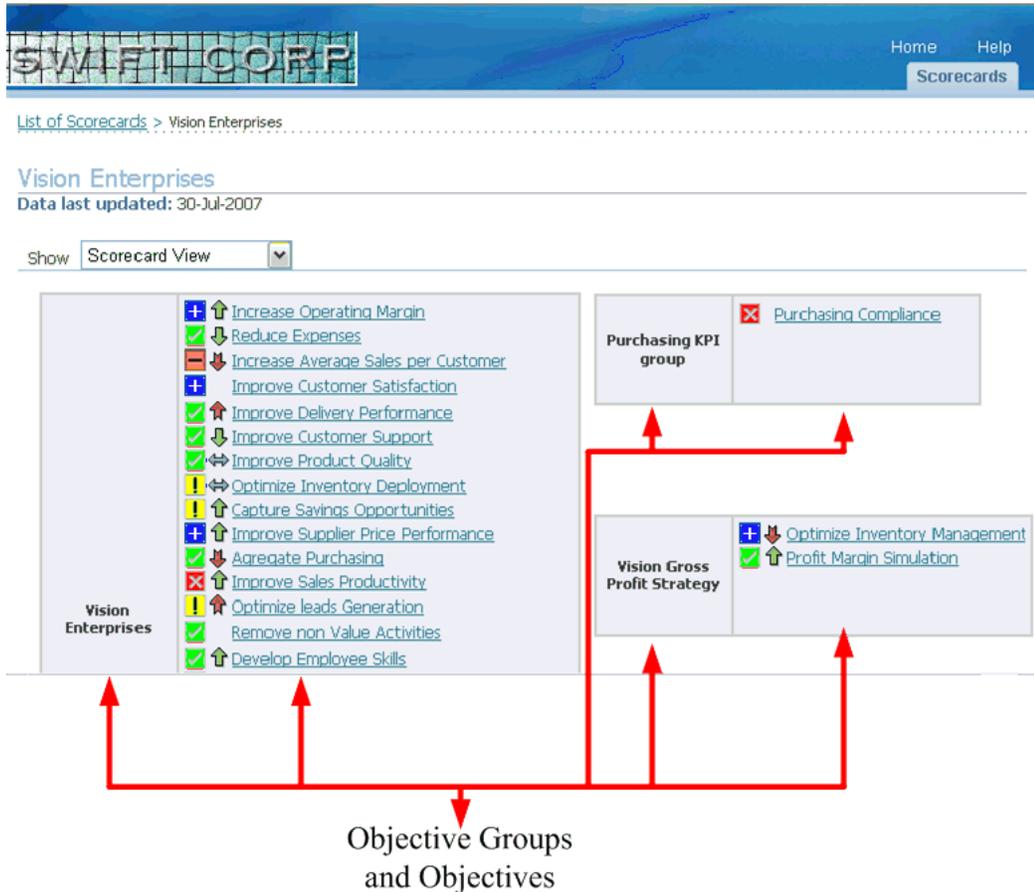
7. If you want to add the scorecard to a hierarchy, then select a parent scorecard from the list of available scorecards.



If you do not want to add the scorecard to a hierarchy, then choose Top Level.

8. 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, organization structure, geographical regions, 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 3-2

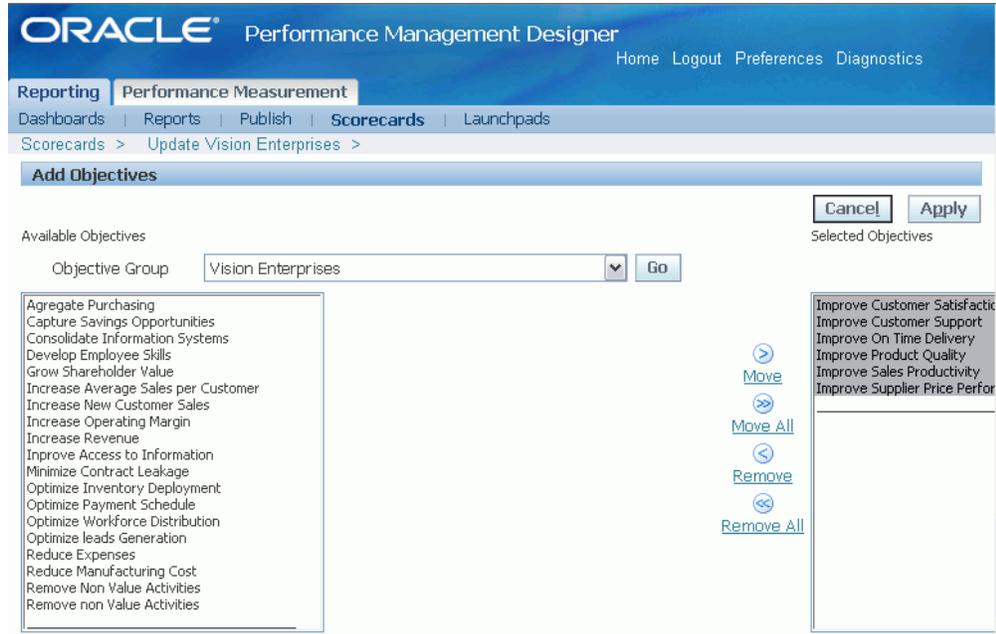
To add objectives to a scorecard:

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

The screenshot shows the Oracle Performance Management Designer interface. The top navigation bar includes 'ORACLE Performance Management Designer' and links for 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this, there are tabs for 'Reporting' and 'Performance Measurement'. Under 'Performance Measurement', there are sub-tabs for 'Dashboards', 'Reports', 'Publish', 'Scorecards', and 'Launchpads'. The 'Scorecards' sub-tab is active, and the page title is 'Update Scorecard: Vision Enterprises'. There are 'Cancel' and 'Apply' buttons. Below the title bar, there are tabs for 'Primary Attributes', 'Objectives', 'Views', 'Filters', and 'Simulations'. The 'Objectives' tab is selected. At the top of the table area, there is an 'Add' button, a 'Previous' link, a dropdown menu showing '1-10', and a 'Next 10' link. The table has four columns: 'Objective Name', 'Objective Group', 'Configure', and 'Remove'. The 'Configure' and 'Remove' columns contain yellow pencil and blue trash can icons, respectively. The table lists ten objectives, all under the 'Vision Enterprises' group.

Objective Name	Objective Group	Configure	Remove
Optimize Inventory Management	Vision Gross Profit Strategy		
Grow Shareholder Value	Vision Enterprises		
Increase Revenue	Vision Enterprises		
Increase Operating Margin	Vision Enterprises		
Reduce Expenses	Vision Enterprises		
Increase Average Sales per Customer	Vision Enterprises		
Improve Customer Satisfaction	Vision Enterprises		
Improve On Time Delivery	Vision Enterprises		
Improve Customer Support	Vision Enterprises		
Improve Product Quality	Vision Enterprises		

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.



6. Click Apply to save your work.

Add Simulations

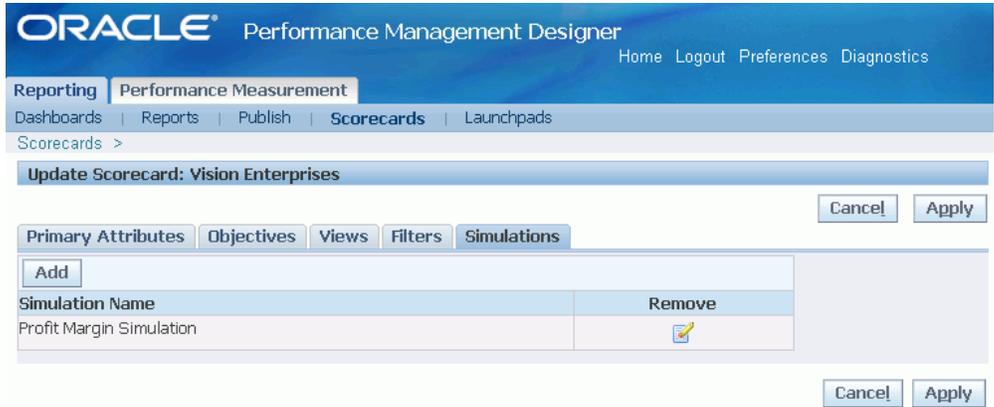
Simulation lets you simulate objective performance by creating multiple "what-if" scenarios. Simulation can be a powerful tool for data analysis and strategic planning. You can create multiple simulations and associate them to a scorecard. Any simulation that you add to a scorecard appears as one of the scorecard objectives. For information about creating simulations, see: Create Simulations, page 4-1.

Prerequisites

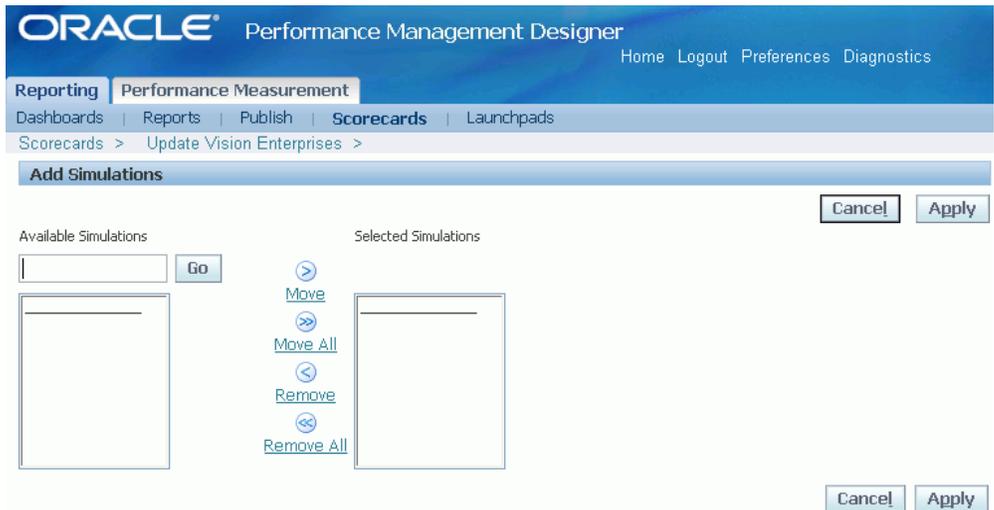
- Create Simulations, page 4-1

To add simulations to scorecards:

1. Navigate to Performance Management Designer > Reporting > Scorecard Designer
2. Select a scorecard and click update.



3. Navigate to Simulations.
4. Click Add.
5. Search for the required simulation.
6. Select a simulation you want to add to the scorecard. Use the right-arrow button to move the selected simulation to the Selected Simulations region. You can select and move more than one simulation at a time.



7. Click Apply.
8. Click Preview to preview added simulations.

Enable Views

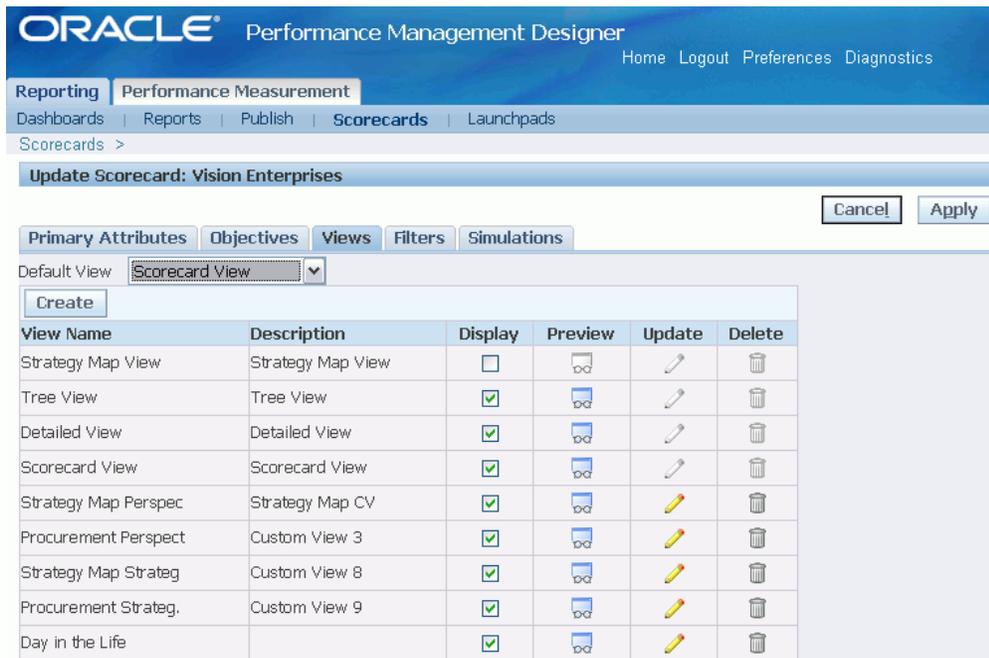
Enable the views to use with the scorecard. By default, each scorecard has the

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.



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.

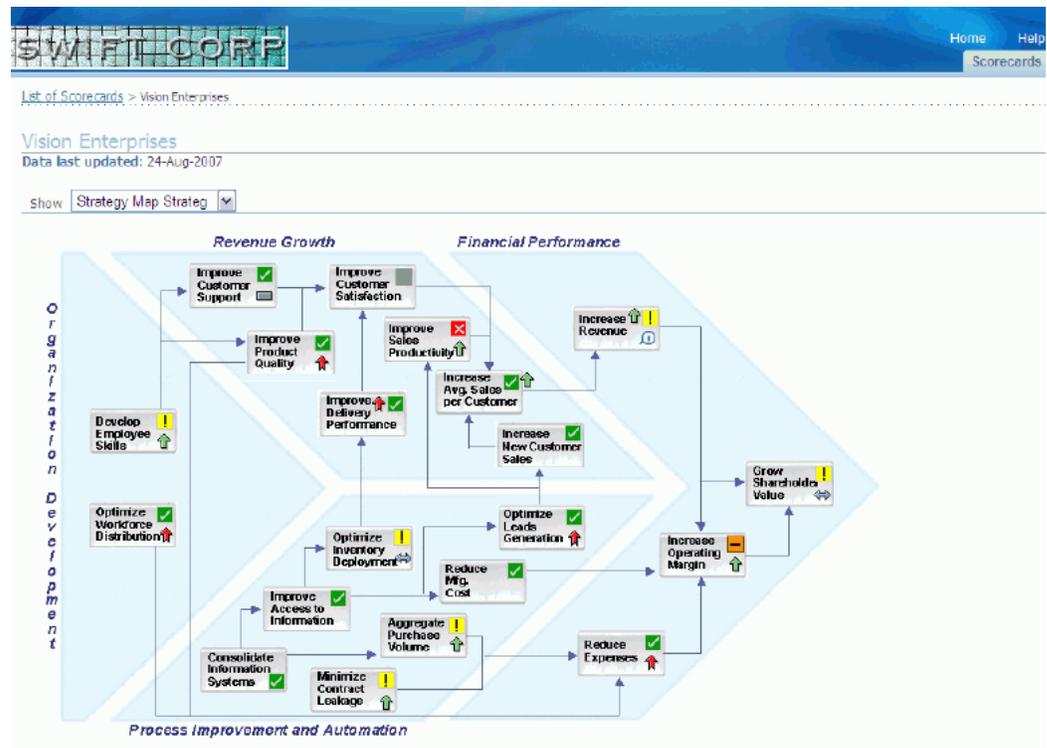
- Click Apply to save your work.

Related Topics

Create Custom Views, page 2-11

"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.
- Select which simulations to 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.

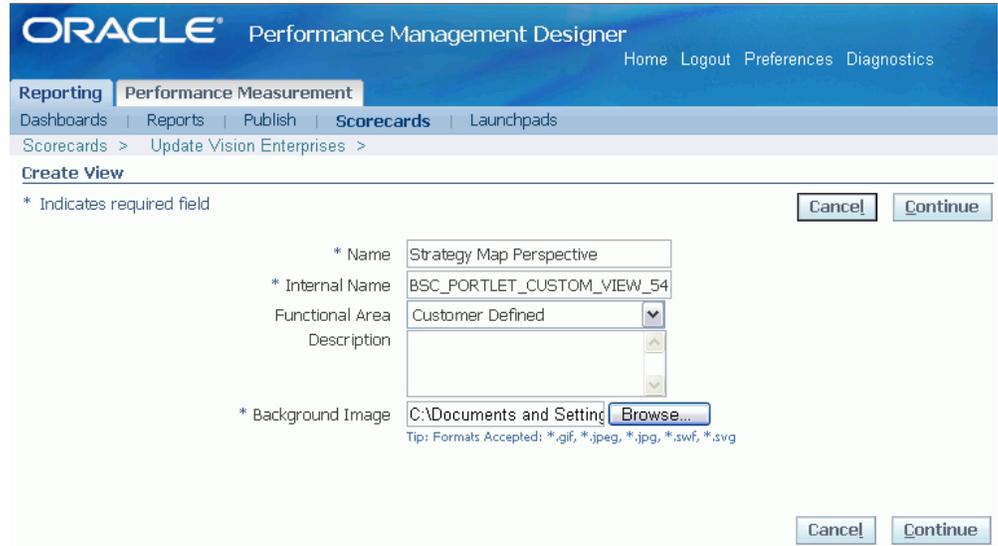
Preview custom views and test any launchpads before you move the scorecard into production mode.

Prerequisites

- Create launchpads (optional), page 2-16
 - Create Simulations, page 4-1

To create a custom view:

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



3. Enter a name for the view.

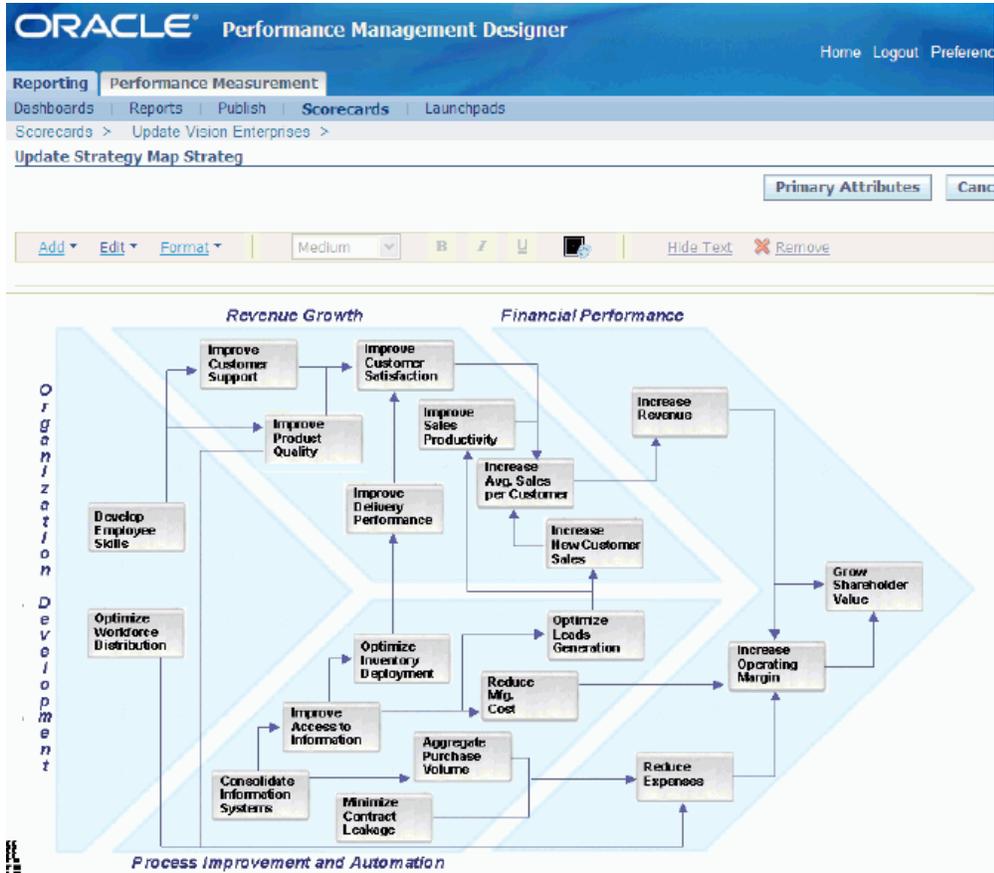
The internal name for the view appears by default. You can update it, if required. Make sure that the name is unique.

4. Select the required functional area.

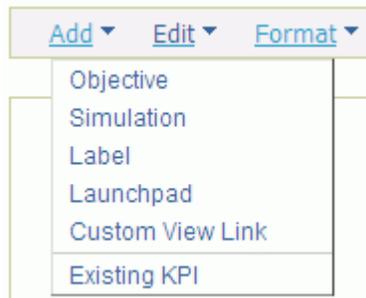
5. Enter a description for the view.

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, Simulation, Label, Launch Pad, Custom View Link, or Existing KPI from the Add menu. Then click Go. Simulations added to the scorecard are available as objectives for selection.



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, objective trend, and the objective label are placed on the view. Scorecard viewers can click the alarm, trend, 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, trend, 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.

Simulation: Add one or more simulations to the scorecard. You can choose which simulations to 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 simulation alarm, simulation trend, and the simulation label are placed on the view. Scorecard viewers can click the alarm, trend, or label to drill down to the objective report.

To edit the simulation:

- Modify the text's label and font.
- Drag and drop the alarm, trend, and label anywhere in the view.
- Create a hotspot for the simulation instead of a label.

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.

Note: You cannot view trends for preseeded KPIs.

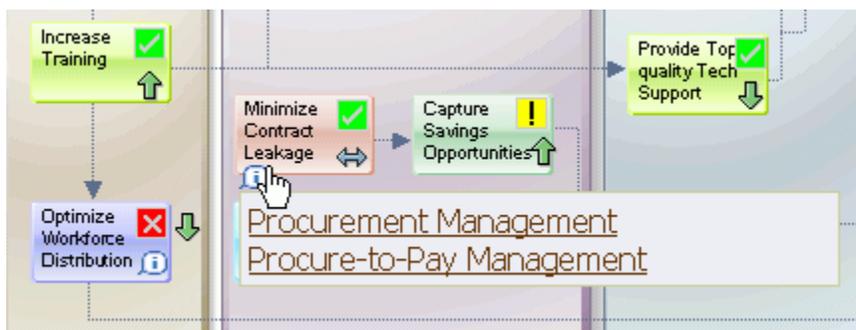
To edit the KPIs:

- 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.

The screenshot shows the Oracle Performance Management Designer interface. The top navigation bar includes 'ORACLE Performance Management Designer' and links for 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this, there are tabs for 'Reporting' and 'Performance Measurement'. Under 'Performance Measurement', there are sub-tabs for 'Dashboards', 'Reports', 'Publish', 'Scorecards', and 'Launchpads'. The 'Launchpads' tab is active, and the 'Create Launchpad' form is displayed. The form has a title bar 'Create Launchpad' and two buttons: 'Cancel' and 'Apply'. Below the title bar, there is a note: '* Indicates required field'. The form contains two input fields: '* Name' with the value 'Procurement Management' and 'Description' with the value 'Procurement Management'. Below the input fields, there are two buttons: 'Add URL' and 'Add Application Pages'. At the bottom of the form, there is a table with the following columns: 'Name', 'Description', 'Move Down', 'Move Up', 'Update', and 'Delete'. The table currently contains one row with the text 'No results found.' and two 'Cancel' and 'Apply' buttons at the bottom right.

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*.

Configuring the Scorecard View

The Scorecard View is the default view that appears the first time you open the BSC Architect > Performance Objective 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.

Configuring the Strategy View

The main purpose of the strategy view is to be able to represent the cause and effect relationships between objectives. Use BSC Architect > Performance Objective Designer to configure strategy view.

To configure strategy view:

1. Click the View icon available on the bottom menu bar in the Performance Objective Designer and select Strategy Map View.

Initially the Strategy Map view consists of an empty screen. To this view you may add objectives, establish horizontal and vertical divisor lines, add labels, add lines and arrows, and modify the zoom and font to make an attractive fit on the screen. Each objective is represented by a square box, or node.

2. To add objective, right-click on an empty area of the screen and choose Add Objective from the pop-up menu.
3. All lines in the Strategy Map view are arrows. To add a line, choose Add Line from the pop-up menu and then choose either vertical or horizontal.

Division lines are long lines that run either horizontally or vertically on the screen. The lines cannot be shortened and they are generally used as "swimming lanes" to delineate perspectives or objective groups that objectives may belong to.
4. To add a division line, right-click on an empty area of the screen and choose Add Division Line from the pop-up menu, then choose either vertical or horizontal.
5. To move a division line, click on it with your mouse and drag it to its new location.
6. To add a label, choose Label from the pop-up menu.

7. To edit the label, click on it and type the desired changes.
8. Use the Zoom In and Out, and the Increase and Decrease Font Size features to achieve an elegant fit of objectives on the Strategy Map view.
9. Use the Save button to save the changes you have made,

You can additionally set the following objective properties in the Strategy Map View:

- Set background color
- Apply shadow
- Apply border to alarms

Defining Filters to a Scorecard

Filtering lets you define which dimension object values you want to see in each scorecard. A filter, applied over a dimension object in a scorecard, impacts all objectives that use that dimension object in that scorecard. Use this feature to show only a set of values for a particular dimension object within a scorecard. For instance, on the Southwest Division scorecard, you may wish to display only the regions and products that contribute to the performance of the Southwest Division.

Filters allow users to define different sets of dimension object 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. For example, a corporate scorecard may show all products, but a scorecard for the Brewery division may show only light beers, while a scorecard for the Soft Drink division may show only soft drink products.

Apply filter for scorecards for the required set of dimension object values. If you want to further restrict the user to view only a dimension object value, then enable common dimension. In case of common dimension use the security module to restrict the user to view a dimension object value. For example, the Brewery division scorecard may be filtered for all products manufactured by the division. Managers for each product may be restricted to view only related scorecards by applying common dimensions. See: Define Common Dimensions

Prerequisites

- Define objectives
- Define dimensions, dimension objectives, and dimension object relationships

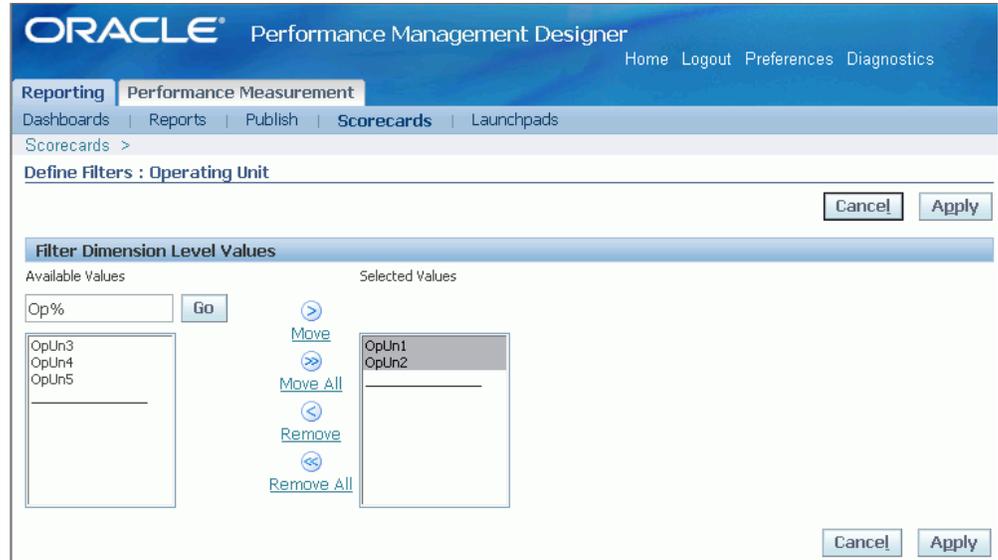
To create filters:

1. Navigate to Performance Management Designer > Reporting > Scorecard Designer.
2. Select a scorecard and click Update.
3. Navigate to Filters. A list of all the dimension objects associated with the objectives on the scorecard appears.

The screenshot shows the Oracle Performance Management Designer interface. The top navigation bar includes 'ORACLE Performance Management Designer' and links for 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this, there are tabs for 'Reporting' and 'Performance Measurement', and a breadcrumb trail: 'Dashboards | Reports | Publish | Scorecards | Launchpads'. The main content area is titled 'Update Scorecard: Vision Enterprises' and has 'Cancel' and 'Apply' buttons. Underneath, there are tabs for 'Primary Attributes', 'Objectives', 'Views', 'Filters', and 'Simulations'. The 'Filters' tab is active, displaying a table of dimension objects.

Dimension Object	Dimensions	Common Dimensions	Update
Sales Group	Dgrp Sales Group - SALES_GROUP	<input type="checkbox"/>	
Warehouse	Dgrp Warehouse	<input type="checkbox"/>	
Line of Business	Dgrp Line of Bu	<input type="checkbox"/>	
Manager	Dgrp Manager - MANAGER	<input type="checkbox"/>	
Vendor Type	Dgrp Vendor Typ	<input type="checkbox"/>	
Operating Unit	Dgrp Operating Unit - OPERATING_UNIT	<input type="checkbox"/>	
Region	Dgrp Region - REGI3	<input type="checkbox"/>	
Strategic Initiative	Strategic Initiatives	<input type="checkbox"/>	
Product	Dgrp Product:	<input type="checkbox"/>	
Region	PMD_1185796427230	<input type="checkbox"/>	

4. Select the dimension object that you want to filter and click Update.
5. Search and enter values in Available Values region for which you want to apply filters and click Go. For example, search for light beers in the Brewery division scorecard. You can apply filters for multiple values.
6. Choose a value from the Available Values region, then click the right-arrow button to move it into the Selected Values region. You can select multiple values.



7. Click Apply.

To preview filters:

1. Navigate to Performance Management Designer > Reporting > Scorecard Designer.
2. Click Preview against the filtered scorecard.
3. Open an objective. Note that the Objective Report shows only filtered data for the dimension object. For example, it might show only data for the Southwest region, or show only data on certain products such as light beer or soft drinks.

Defining Common Dimension at Scorecard Level

The common dimension functionality allows you to evaluate the performance of all objectives across various dimension object members in a scorecard view.

For example, you can evaluate the performance of all the objectives associated with the ABC company scorecard across various Regions where region is a common dimension. You can also secure the scorecard by restricting dimension object values visible to the user based on their responsibility.

Common Dimension when enabled appears as a View By option for all of the views that are defined for a scorecard. For example, assume that a corporate scorecard has dimension object values for industry, account, goal, and objective. You can then enable common dimensions to view that scorecard for a specific industry or for a specific account.

You can choose any possible combination of dimension object and dimension object

values. You are only restricted by the relevant parent-child relationships. For example, if you are viewing a Manufacturing account, you cannot also choose to view a Life Science account, because the Life Science account is not a child value of Manufacturing.

The List button feature is commonly used in combination with security. For example, the scorecard administrator can restrict users so that they can only view a particular dimension value for a particular scorecard. For example, a Manufacturing manager can only view data related to Manufacturing and a Life Science manager can only view data related to Life Sciences.

Prerequisites

- Define objectives
 - Define dimensions, dimension objects, and dimension object relationships

To configure common dimension:

1. Navigate to Performance Management Designer > Reporting > Scorecard Designer.
2. Navigate to a scorecard and click Update.
3. Navigate to Filters. A list of all the dimension objects associated with the objectives on the scorecard appears. If the dimension object is *common across* all objectives, a check box appears.
4. Enable the check box next to the dimension object to configure common dimension.
5. Click Apply to save your work.

Restrictions

You can use the common dimension feature only if:

- The dimension object is common to *every* objective on the scorecard. For example, the Industry dimension object must exist on every objective in the scorecard.
- The dimension objects are in the *same order* (from left-to-right) on every objective. To ensure this, you may want to group dimensions in a common Dimension Set in the Dimension definition window, and assign the set as a whole to objectives.
- The default value for the dimension object is *not* COMPARISON.
- The dimension must have *at least* one dimension object.

Note: Independent dimensions are not supported as they create

many-many relationships.

- Must be defined as a parent-child relationship and that relationship *must be* a one-to-many, *not a* many-to-many relationship. For example the State-City relationship is a one-to-many relationship, because a State can have many Cities, and a City belongs to just one State. However, the State-Product relationship is a many-to-many relationship because a Product can be sold in many States, and a State can have many Products.

Assign Responsibility to Users at Scorecard Level

For each scorecard, the scorecard administrator can assign roles to other users. The user who creates a scorecard is automatically assigned Administrator role. If a designer created a scorecard, the designer is automatically assigned the Administrator role. All other users are automatically assigned Users role. This functionality is based on Oracle Applications Role Based Access Control (RBAC). As a user performing the Administrator role, you can grant roles to other users if you want that user to be able to update a scorecard or perform administrative functions for the scorecard. The available roles are:

- **User:** View the scorecard and scorecard properties. This is the default setting for all users.
- **Designer:** View and update the scorecard.
- **Administrator:** 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 access history for a scorecard.

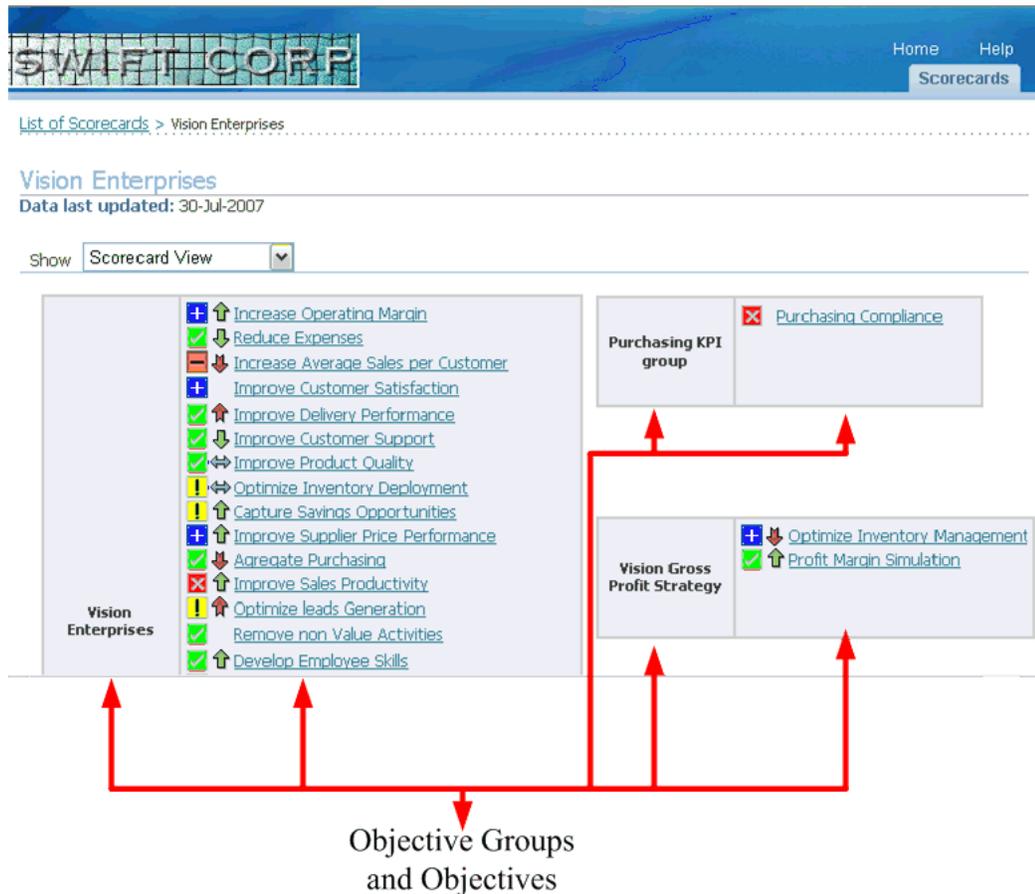
To assign responsibilities to users, see: *Oracle Balanced Scorecard Security Guide*.

Objectives

This chapter covers the following topics:

- Overview of Creating Objectives
- Create KPIs
- Create Data Source Groups
- Create Dimensions
- Create Objectives
- Create Profit and Loss
- Create Custom Calendars and Periods
- Defining Other Objective Properties - Architect
- Create Dashboards and Reports

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 financial and non-financial metrics used to quantify objectives. KPIs reflect the strategic performance of an organization. If an objective contains multiple KPIs, choose any one of the following methods to determine the objective alarm status:

- Default KPI
- Best KPI
- Worst KPI
- Most Frequent KPI
- Weighted Average

Dimensions represent the different levels of aggregation for each KPI.

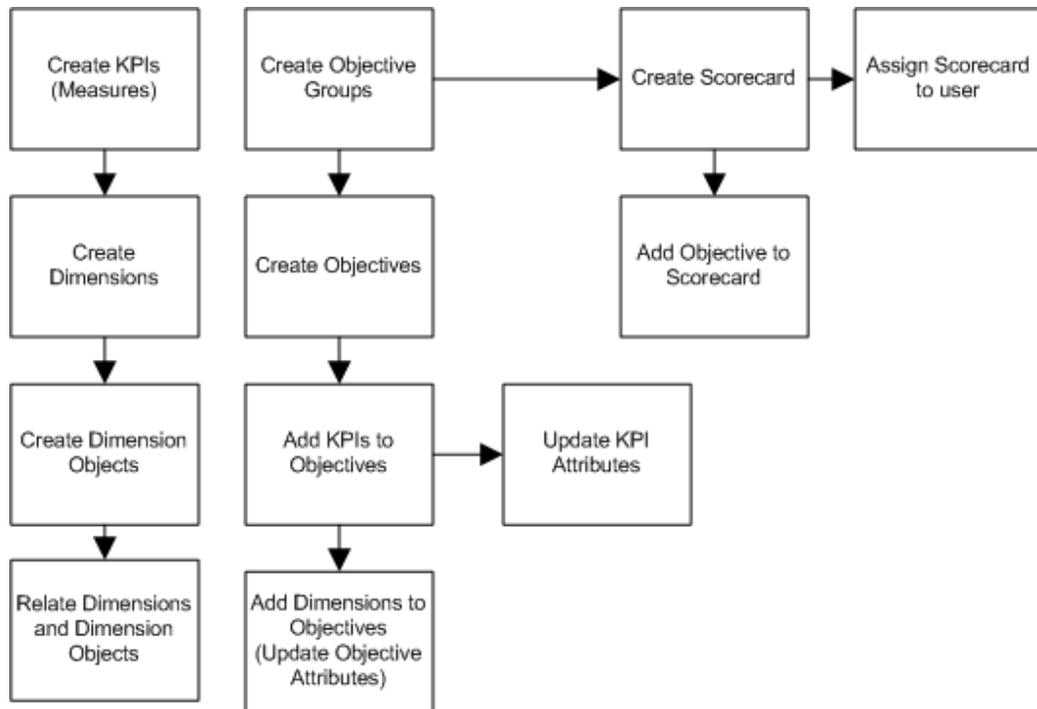
When you create an objective you are really defining the contents of the Objective report. The Objective report, enables you to view the details of the KPIs and dimensions used to calculate the objective status. The Objective report also enables you to view data for previous years, if available.

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 simulations and profit and loss objectives 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 slice and dice the KPI data. This enables you to analyze the performance of the objective related to the KPI. You can perform analysis by drilling down the dimension hierarchy. For example, you can create a dimension that includes each of your sales groups and sales regions. You can analyze the performance of the objectives or KPIs for each sales group and for each sales region. 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 KPIs, page 3-4
2. Create Data Source Groups, page 3-10
3. Create Dimensions, page 3-11
4. Create Objectives, page 3-18
5. Create Profit and Loss, page 3-46

Related Topics

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

Create KPIs

KPIs (also known as measures) are used to calculate the performance of an objective. An objective may be associated with more than one KPI. The performance of a KPI determines the performance of the associated objective.

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

Create KPIs (measures):

Primary Attributes

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. The top navigation bar includes 'ORACLE Performance Management Designer' and links for 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this is a sub-navigation bar with 'Reporting' and 'Performance Measurement' tabs. Under 'Performance Measurement', there are links for 'Measures', 'Dimensions', 'Objectives', and 'Simulations'. A left-hand menu is open to 'Measures >' and 'Primary Attributes' is selected. The main content area is titled 'Create Measure: Primary Attributes' and includes a 'Cancel' button and 'Step 1 of 4' indicator. The form contains the following fields:

- * Name: Measure 1
- * Internal Name: PMD_35269
- * Application: Progress Custom
- Functional Area: Customer Defined (dropdown menu)
- Description: (empty text area)
- Generated Source

At the bottom right, there are 'Cancel', 'Step 1 of 4', 'Next', and 'Finish' buttons.

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.

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.

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.

For more information about Calculation methods, see: *Create Objectives*, page 3-18.

For more information about the Year to Date (YTD) calculation method, see: *To define analysis option for each KPI*, page 3-34.

16. Select the goal type that you want to associate with the KPI.

Goal type is used to measure the desired performance of a KPI over previous periods. The goal type defined determines the trend color of a KPI.

Depending on the type of KPI you have defined, choose from one of the following goal types.

- **Target met above plan:** Select this option if the increase in actual data of the KPI is desirable.. For example, KPI of type Sales Revenue.
- **Target met below plan:** Select this option if the decrease in actual data of the KPI is desirable. For example, KPI of type Sales Expense.
- **Target met within ranges:** Select this option if you want to keep actual data of the KPI close to a target value.. For example, KPI type Sales Revenue can either have goal type as target met above plan or target met within ranges.

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

Click Next to proceed. The Formulas page appears.

Create Measure: Formulas

Cancel Back Step 3 of 4 Next Finish

Formula Aggregation Method

Apply aggregation method to the each element of the formula.
 Apply one aggregation method to the formula. Sum
 Formulas between 2 calculated Measures.

Go

Formula Editor

Available Source Columns

Search Go

AAA
 AD-Leverage_Six_Sigma
 ADCSimTree
 ADCostReduction
 ADDefectsMillion
 ADExpenses
 ADGreenBelts
 ADMarginDollar
 ADNon6Sigma

Add
 Remove

Formula

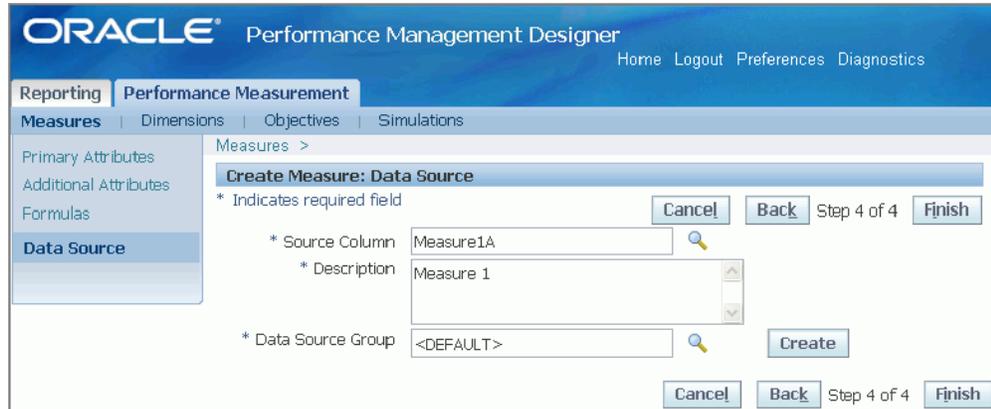
Measure1A

+ - * / () Validate

Cancel Back Step 3 of 4 Next Finish

Formula

17. 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.
18. 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.
19. Click Validate to ensure that the formula you created is valid.
20. Click Next to proceed. The Data Source page appears.



Data Source

21. 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.
22. Enter a description for the source column.
 23. 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.

Create 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 Dimensions

Dimensions allow you to filter data for an objective or KPI. Each dimension contains several *dimension objects*. For example, Geography can be a dimension and each country, state, and city is a different dimension object. You can create a hierarchy of dimension objects by defining the parent-child relationships between the objects. That is, in the above example country and state can have a parent-child relationship. For example, USA, India, Brazil, Russia, and China can be members of the dimension object country and each country can comprise of many states.

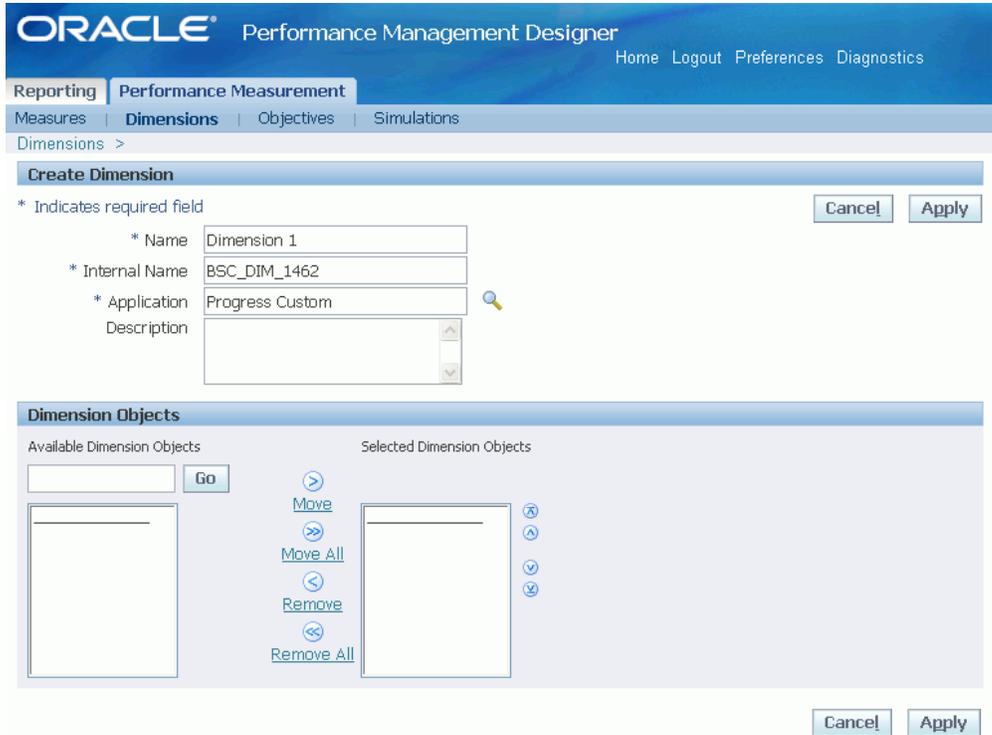
You can assign the same dimension to multiple KPIs. You can add or remove Dimension Objects by updating the Dimension.

To create dimensions:

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



3. Click Create.



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

Note: The list of dimensions includes the preseeded dimensions for the E-BI measures. You cannot update preseeded 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 | Simulations

Dimensions

Dimension Objects

Dimension Object Relationships

Calendars

Dimension Objects

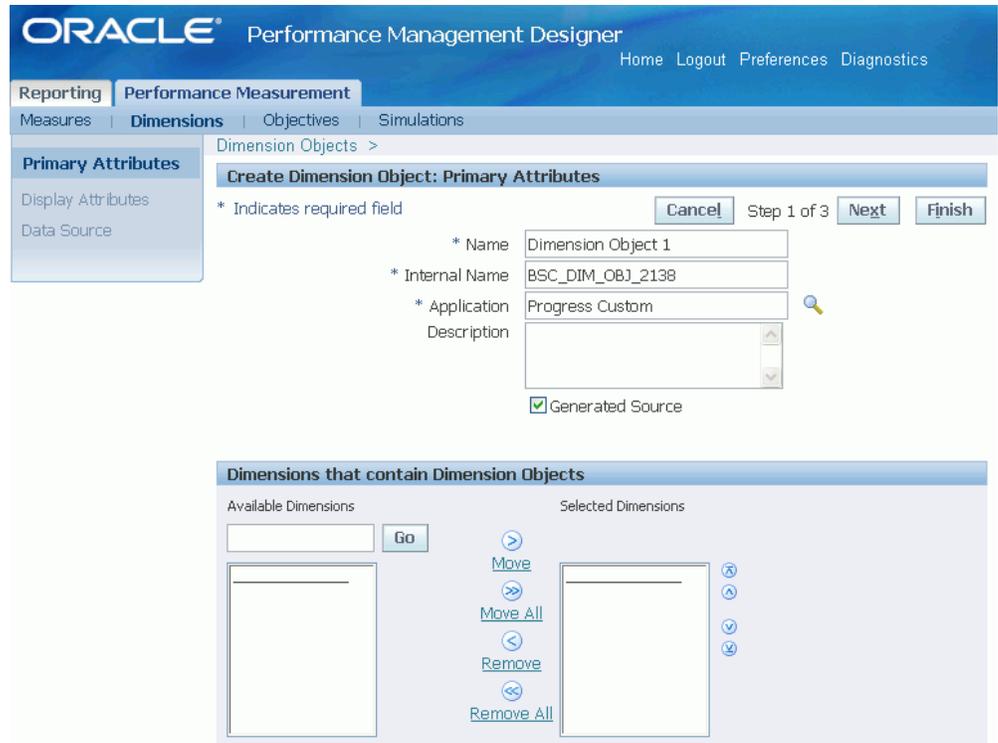
Search

Name

[Previous](#) 1-50

Name	Description	Created By	Last Updated	Update	Delete
Direct Sub-Organization	Direct Sub-Organization	ORACLE	09-Nov-2003 22:58:28		
All Persons	All Persons	ORACLE	09-Nov-2003 22:58:28		
Strategic Initiative	Strategic Initiative	SYSADMIN	24-Nov-2003 17:00:00		
ABC Channel	ABC Channel	SYSADMIN	08-Jan-2004 12:34:24		
ABC Operating Unit	ABC Operating Unit	SYSADMIN	08-Jan-2004 12:35:02		
ABC Product Line	ABC Product Line	SYSADMIN	08-Jan-2004 13:48:08		
ABC Brand	ABC Brand	SYSADMIN	08-Jan-2004 13:48:10		

2. Click Create.



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 preseeded Dimension Objects. These dimension objects cannot be changed or deleted.

15. Click Finish to create the dimension object.

To create dimension object relationships:

Dimension relationships allow you define parent-child relationships between dimension objects. This function is crucial for the proper operation of BSC, including the dimension objects and List button features. In addition, input and system table layouts depend very much on having the dimension object relationships set up properly.

A parent dimension object value has one or more child dimension object values that roll up into it. For example, assume the parent dimension object is STATE and the child dimension object is CITY. Various CITY values (e.g., Sacramento, San Francisco, Los Angeles, and San Diego) roll up into a specific STATE value (e.g., California).

A parent dimension object can also roll up into another parent dimension object. For example, the STATE dimension can roll up into the REGION dimension (e.g., California, Washington, Oregon, Arizona, and Utah all roll up into the Western region).

Set relations between Dimension Objects using the Dimension Object Relationships side navigation under the Dimensions tab.

1. Click Dimension Object Relationships.

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

Reporting | Performance Measurement

Measures | **Dimensions** | Objectives | Simulations

Dimensions
Dimension Objects
Dimension Object Relationships
Calendars

Dimension Object Relationships

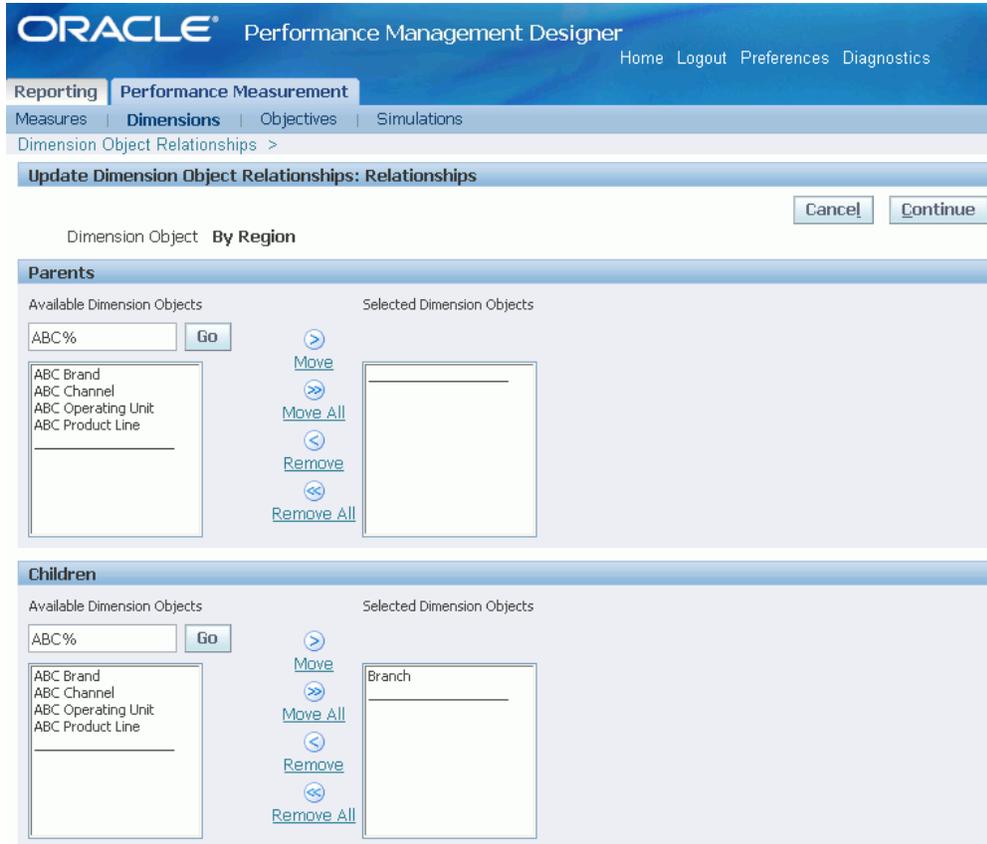
Search

Name

Previous Next 50

Name	Parents	Children	Created By	Last Updated	Update
Noetix Bank Branches			WTUCKER	24-Jan-2006 13:13:12	
Noetix Budget			WTUCKER	24-Jan-2006 12:48:56	
Noetix GL Period Name			WTUCKER	24-Jan-2006 13:02:55	
Company Region			WTUCKER	28-Nov-2005 12:04:40	
Noetix Set Of Books			WTUCKER	24-Jan-2006 12:51:44	
Noetix GL Account Type			WTUCKER	24-Jan-2006 13:00:20	
Noetix Bank Accounts			WTUCKER	24-Jan-2006 13:21:47	

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 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 the following:

- Which KPI is the default KPI?

- Which KPI determines the alarm color for the objective?
- What is the periodicity for which performance of a KPI can be computed?
- What parameters to add to view the data in objective report?

There are color methods to determine the alarm color of an objective. These color methods consider the performance of more than one KPI to determine the objective color.

After you update the objective, you can define the attributes for each KPI. You can change the display name of KPIs assign dimensions, and color properties for each KPI. 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 the gross profit in your enterprise, you could set up objectives as shown in the figure above. In that example, the Vision Gross Profit Strategy objective group contains two objectives: Optimize Inventory Management and Profit Margin Simulation. If you drill into the Optimize Inventory Management objective, you see that it contains one KPI: Inventory Value.

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

You can create four different types of objectives:

- **Single Bar:** Single bar objectives display a single data series. Use single bar objectives to show a historical trend compared to one or more benchmarks. For example, you can use a single bar objective to represent actual revenue against forecasted or planned revenue.
- **Multiple Bar:** Displays multiple data series, or measures, across time. Use multiple bar objectives to break data into subcomponents. For example, if you want to view Customer Deposits by account types, such as Checking, Savings, and CDs.
- **Simulation:** Displays "what-if" scenarios. A simulation 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.

When you create a single bar objective 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 objectives, are unique because they have multiple data sources, but those sources are displayed in the same graph.

Prerequisites

- Create KPIs, page 3-4
- Create Dimensions, page 3-11

To create an objective group and objective:

1. Navigate to Performance Measurement > Objectives Designer.
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. Select the objective type, either Single Bar or Multi Bar.
8. Click Apply to save your work.

To preview an objective:

After creating a 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.

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.

The screenshot shows the Oracle Performance Management Designer interface. The 'Objectives' tab is active, and the 'Update Objective: Primary Attributes' dialog is open. The dialog includes the following fields and options:

- Name:** Increase Operating Margin (Maximum 50 Characters)
- Description:** Indicator Help
- Type:** Multi Bar
- Default KPI:** Operating Margin
- Compare To Graph Type:** Line

Buttons for 'Cancel' and 'Apply' are present at the bottom right of the dialog.

2. Select the default KPI 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.

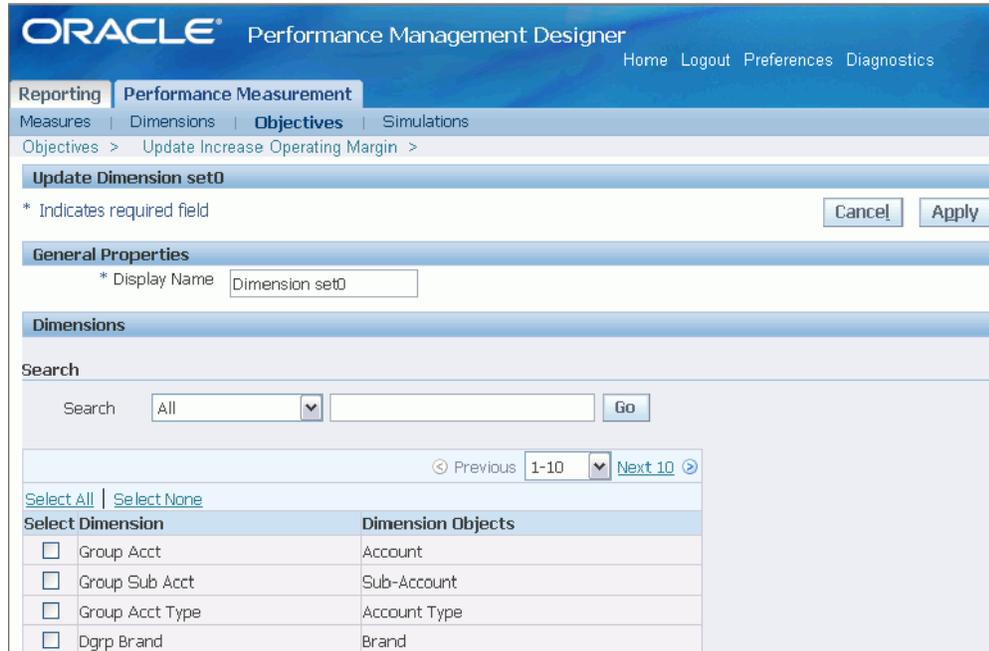
The screenshot shows the Oracle Performance Management Designer interface. The 'Objectives' tab is active, and the 'Update Objective: Dimension Set' dialog is open. The dialog includes the following elements:

- Expand All | Collapse All** link
- Table:**

Focus Name	Key Item	Add Child	Update	Order	Delete
Dimension Sets		+			
Dimension set0					

Buttons for 'Cancel' and 'Apply' are present at the bottom right of the dialog.

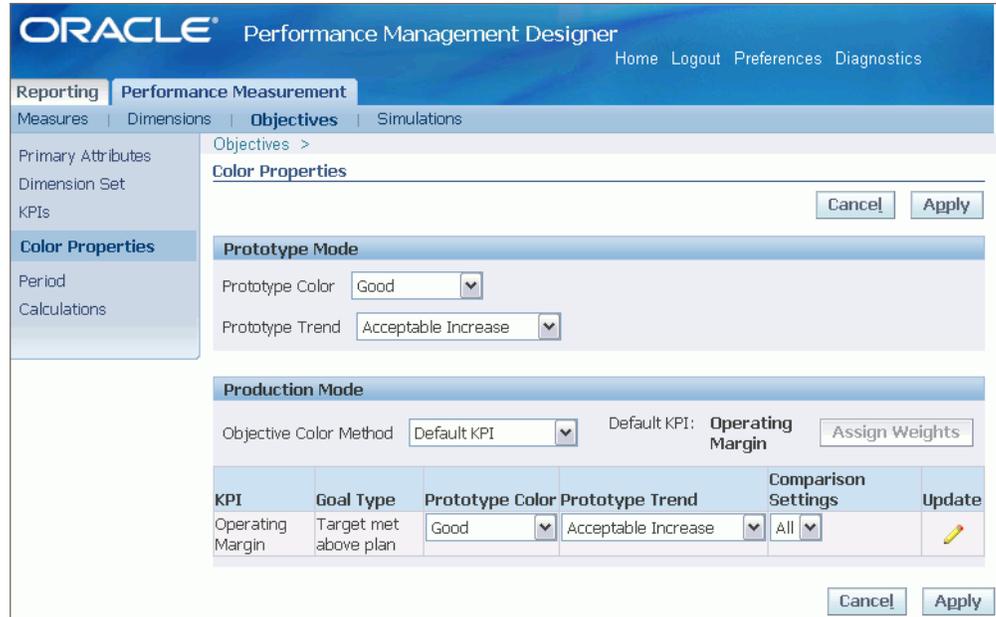
5. To add additional dimension sets, click Add Child.
6. To add dimensions to a dimension set, select the dimension set and click Update.



7. Select the dimensions that you want to add to the dimension set. You can add maximum 10 independent dimension objects.
8. Select the key item value for dimensions that you have added to the dimension set.
Key Items allows you to define a default dimension object value for the objective. For example, "Texas" could be defined as the default value for the States dimension object. Defining "Texas" as the default dimension value has two consequences:
 - Texas will be the dimension value that users see when they view the objective.
 - The alarm color for the objective will be calculated based on the actual versus plan for Texas. For example, it could be calculated as actual versus plan for all Products, for all Delivery Types, in Texas.

Note: This option can only be used after you load dimension values into Balanced Scorecard. In addition, if a specific dimension value is chosen to be the default and no data exists for that dimension value, the alarm color for the objective will be gray.

9. Navigate to Color Properties.



To define color properties

1. Define the prototype color properties.

The prototype colors you define here determine the color of the objective when in prototype mode. The default Prototype color is Acceptable and the Prototype trend is Acceptable Increase.

2. Choose a method that determines the alarm color of the objective. The available methods are:

- **Default KPI:** This is the default value.

Note: If you choose methods other than Default KPI, the Default KPI value no longer determines the color of the objective.

- **Worst KPI:** If you choose this method, the poorest performing KPI determines the color of the objective. The trend of the poorest performing KPI is the trend of the objective. If two or more KPIs are equally poor performers, then the first KPI in the hierarchy is used to determine the color of the objective.
- **Best KPI:** If you choose this method, the best performing KPI determines the color of the objective. The trend of the best performing KPI is the trend of the objective. If two or more KPIs are equally good performers, then you can view details of the first of those KPIs in the hierarchy in the objective

report.

- **Most frequent KPI:** If you choose this method, the most common KPI color determines the color of the objective. The trend of the KPI that is used to color the objective is the trend of the objective.

For example, if there are five KPIs listed under an objective, the alarm color of two KPIs is red and the alarm color of three KPIs is green, then the alarm color of the objective is green. In case there is a tie between the number of red, green, or yellow or any other color KPI, then you can view details of the poorest performing KPI in the objective report.

- **Weighted Average:** At times it is not possible to measure the performance of an objective based on a single KPI. You will have to take into consideration a set of KPIs, where each KPI is of different type and plays a role. For example, while measuring Customer Satisfaction you will get an accurate picture if you take into account other KPIs such as Returned Value, Number of Complaints, and Resolution Time. In such cases you can choose Weighted Average as the color method.

No trend is computed for objectives whose color method is Weighted Average.

If the Weighted Average method is chosen, assign weights to each KPI to compute the weighted average.

The Weighted Average index is calculated by considering the following:

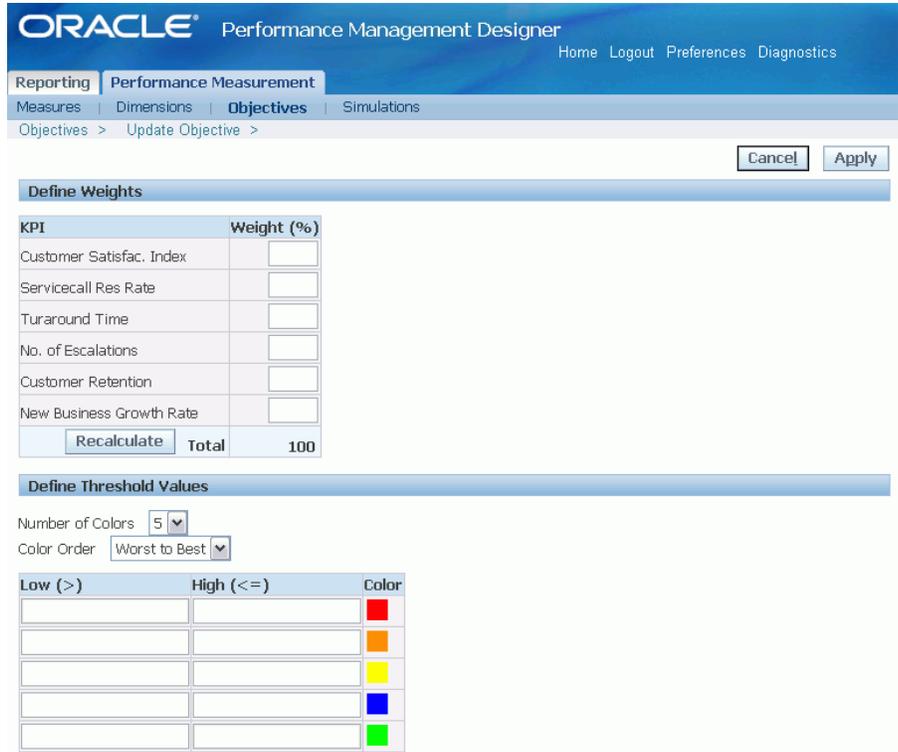
- The KPIs associated to calculate the weighted average.
- The weights assigned to each KPI.
- The alarm colors of each KPI.
- The weighted equivalent of each alarm color.

The user can view the details of weighted average index in the Information tab of the Objective report.

3. To update the Prototype Color, Prototype Trend, Comparison Settings, and Color Properties for a KPI, click Update icon next to the KPI.
4. Click Apply to save your work.

To assign weights

1. Click Assign Weights.



2. Assign weights to KPIs and calculate the total weighted average.

Rules while adding weights

- The weights must add up to 100%.
- Any KPI in the calculation can have a 0% weight assigned.
- Weights cannot be negative.
- Weights need to be reassigned each time KPIs are added or to taken out of the calculation.

3. Define color threshold values.

- Choose the number of colors you want to use as alarms. The available options are three or five.
- Choose the color order. The color order determines the order that the colors are displayed in the range table. The available options are Worst to Best and Best to Worst.
- In the range table, define the color thresholds. You can define

acceptable and marginal threshold values for each color.

4. Click Apply.
10. To define analysis options for KPIs, navigate to KPIs. For more information about analysis options, see: To define analysis option for each KPI , page 3-34 and To define series for multi bar objectives, page 3-37.
11. Navigate to Periods and define the period values for the objective as required.

The screenshot shows the Oracle Performance Management Designer interface. The 'Performance Measurement' tab is active, and the 'Objectives' sub-tab is selected. The 'Update Objective: Period' dialog box is open, showing the following settings:

- Calendar: Bsc Gregorian
- Default Period: Month
- Navigation: Previous, 1-10, Next 10
- Buttons: Select All, Select None
- Table of Periods:

Select Period	Periods In Graph
<input checked="" type="checkbox"/> Month	12
<input type="checkbox"/> Kuukausittain	1
<input type="checkbox"/> Quarter	4
<input type="checkbox"/> Kuukausittain	1
<input type="checkbox"/> Mensual	1
<input type="checkbox"/> Week	54
<input type="checkbox"/> Bi-Month	6
<input type="checkbox"/> Semanal	1
<input type="checkbox"/> Day	365
<input type="checkbox"/> Monthly	1

Navigation: Previous, 1-10, Next 10

Annual Periodicity

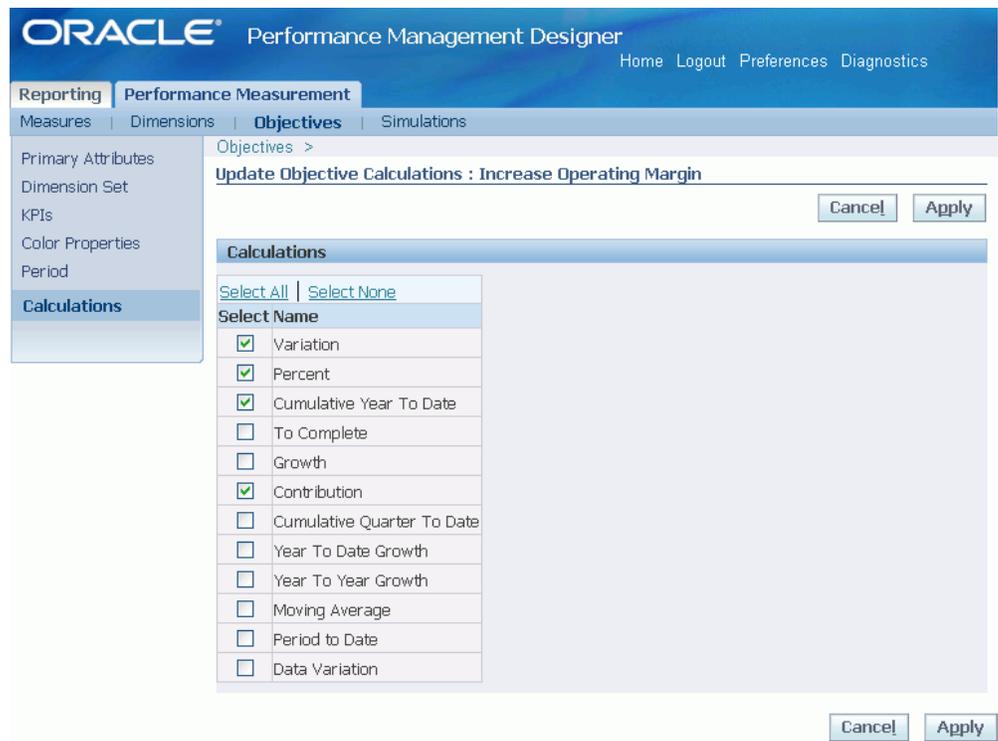
- Number of Years: 10
- Previous Years: 5

Buttons: Cancel, Apply

To define period values

1. Select the required calendar.
2. Set the default period for the objective.
3. Select the period to be displayed on the objective graph.

4. Set the number of periods that are displayed in the graph at one time.
 5. If you are setting properties for the Year period, configure the following additional fields:
 - **Number of Years:** The number of years set in this field determines the number of periods to be shown in the graph when the user selects year periodicity.
 - **Previous Years:** The number of years set in this field determines the number of periods prior to the current year to be shown in the graph when the user selects year periodicity.
12. Navigate to Calculations and define the calculations for the objective. Enable or disable calculations as required.



You can enable a variety of calculations for scorecard users. You can also define calculations at two levels: Measure and Objective. Use the Measure Designer to define which calculations are applicable for each measure. Also, use the Objective Designer to determine the calculations you want to enable for the Objective as a whole.

Note: To view calculations in the Objective report the calculations

that are enabled for each measure must match the calculations that are enabled for the objective.

The available calculations are:

- **Variation**

Shows the difference between the actual results and the benchmark value.

Behavior: The following table describes how the variation calculation appears in the graph and table regions of the Objective report.

Graph	Table
Only Variation is plotted.	A Variation column is added.

Formula:

$$A_{cy} - P_{cy}$$

Where

A_{cy} = Actual value for selected period in current year.

P_{cy} = Benchmark or Plan value for selected period in current year.

- **Percent**

Shows actual results as a percentage of the benchmark value.

Behavior: The following table describes how the percent calculation appears in the graph and table regions of the Objective report.

Graph	Table
Only Variation is plotted	A Variation column is added.

Formula:

If $P_{CY} > 0$ and $A_{CY} > 0$, then $(A_{CY} / P_{CY}) \times 100$

If $P_{CY} < 0$ and $A_{CY} > 0$, then $(2 + \text{abs}(A_{CY}/P_{CY})) \times 100$

If $P_{CY} < 0$ and $A_{CY} < 0$, then $(2 - \text{abs}(A_{CY}/P_{CY})) \times 100$

- **Cumulative Year To Date (CYTD)**

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.

Percent and Variation calculations can be applied to Cumulative Year To Date values.

The Cumulative Year To Date calculation cannot be used with balance measures, such as Total Assets.

Behavior: The following table describes how the CYTD calculation appears in the graph and table regions of the Objective report.

Graph	Table
Cumulative Year To Date Values for Actual and Plan are plotted.	The values listed in the Actual and Budget column represent Cumulative Year To Date values.

Formula:

$$A_{CYd} = \sum A_{CY}$$

$$P_{CYd} = \sum P_{CY}$$

Where:

A_{CYd} = Cumulative Actual Value for selected period in Current Year.

P_{CYd} = Cumulative Plan Value for selected period in Current Year.

- **Cumulative Quarter To Date**

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 balance KPIs or measures

The behavior and calculation is same as CYTD, but calculated for each quarter.

- **Period to Date**

This calculation introduces the concept of As of Date reporting. Shows the rolling total of actual and plan values for a given reporting period which is delimited by "As of Date". That is, 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 3-26 Oracle Balanced Scorecard Administrator Guide 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).

Important: To use this calculation you must load data at the day level.

Note: The Period to Date calculation applies if you want to obtain As of Date information for balance KPIs or measures.

Behavior: The following table describes how the Period to Date calculation appears in the graph and table regions of the Objective report.

Graph	Table
Actual and Budget values for full period as well as the Period to Date values are displayed.	Actual and Budget values for full period as well as the Period to Date values are displayed.

Formula:

$$\sum A_{ptd} \text{ and } \sum P_{ptd}$$

Where:

A_{ptd} = Actual to Date Value for selected period in Current Year.

P_{ptd} = Plan to Date Value for selected period in Current Year.

- **Year To Date Growth (YTD)**

Shows percentage change in actual values of current period when compared to last period of 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.

Note: For more information about Year to Date calculation, see:
To define analysis option for each KPI, page 3-34.

Behavior: The following table describes how the YTD calculation appears in the graph and table regions of the Objective report

Graph	Table
Only Year to Date growth is plotted.	Additional Year to Date Growth columns are added for Actual and Budget.

Formula:

$$\{(A_{cy} - LPA_{py}) / LPA_{py}\} \times 100$$

Where:

LPA_{py} = Last Period Actual Value in the prior year.

- **Year To Year Growth (YTY)**

Shows the percentage change in actual values of current period when compared with the same period in prior year.

Behavior: The following table describes how the YTY calculation appears in the graph and table regions of the Objective report

Graph	Table
Only Year to Year Growth is plotted.	Additional Year to Year Growth columns are added for Actual and Budget.

Formula:

$$\{(A_{cy} - A_{py}) / A_{py}\} \times 100$$

Where:

A_{py} = Actual Value in the prior year.

- **Growth**

Shows the percentage change in actual values of current period when compared with prior period of the same year.

Behavior: The following table describes how the Growth calculation appears in the graph and table regions of the Objective report.

Graph	Table
Only Growth is populated.	Additional Growth columns are added for Actual and Budget.

Formula:

$$\{(A_i - A_{i-1}) / A_{i-1}\} \times 100$$

Where:

A_i = Actual value of current period in Current Year.

A_{i-1} = Actual value of prior period in Current Year.

- **Contribution**

This calculation is only available for comparison graphs. Shows how much each data dimension element contributes to the total results for that dimension.

Behavior: The following table describes how the Contribution calculation

appears in the graph and table regions of the Objective report.

Graph	Table
	Additional columns are added to show contribution to Actual and Budget.

$$(A_{doi} / \sum A_{doi}) \times 100$$

Where:

A_{doi} = Actual value of each dimension object member.

- **Moving Average**

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.

Behavior: The following table describes how the Moving Average calculation appears in the graph and table regions of the Objective report.

Graph	Table
Only Moving Average value is plotted.	Additional Moving Average Columns are added for Actual and Budget.

Formula:

$$(A_i + A_{i-1} + \dots + A_{i-11}) / 12$$

- **Data Variation**

Shows the difference between any two series in the same period. This calculation is available for multiple bar objectives only.

Formula:

$$A_{s1} - A_{s2}$$

Where:

A_{s1} = Actual value of first series.

A_{s2} = Actual value of second series.

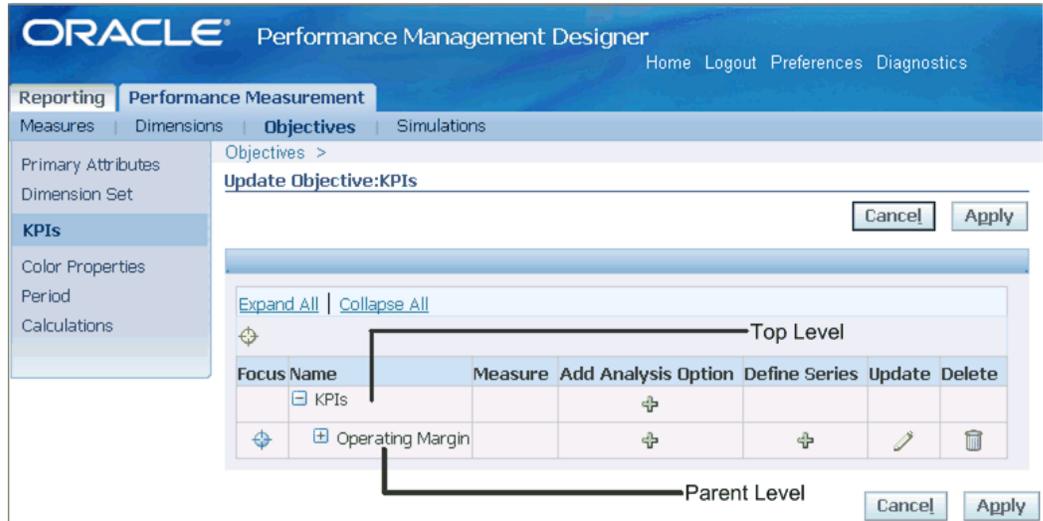
- **To Complete**

Shows the previous period and actual period relative to the plan. The difference between the accumulated results and the targeted goal is then distributed equally over the remaining periods which shows what still needs to be completed in order to meet the plan.

13. Click Apply to save your work.

To define analysis option:

Analysis option allows the user to analyze data from various viewpoints using different measures associated with the KPI. For example, an objective like Increase Average Sales Per Customer can be measured by the following KPIs: Amount Booked Per Customer, Revenue Per Customer, and Strategic Initiatives. Depending on the granularity of analysis you desire, you may want to analyze critical or important KPIs in details. In the above example, the performance of Strategic Initiatives can be measured by % of Completion, Cost, Resources, Sales, and Revenue generated. Strategic Initiatives, % of Completion is an analysis option combination, Strategic Initiatives, Cost is another analysis option combination, so on and so forth. You can have any number of analysis option combinations.



General configuration rules to define analysis options

- KPIs added to an objective through the Objective Designer are by default listed under KPIs.
 - You can add additional individual KPIs.
 - You can create a hierarchy of analysis options by defining parent-child analysis combinations. For example, in the figure above, Strategic Initiatives - % of Completion form a parent-child KPI analysis combination.
 - You can define many parent-child combinations but a parent can have only two levels of analysis options. For example, Strategic Initiatives - % of Completion - % of Life Science Industry forms an analysis option combination with the parent Strategic Initiatives having two levels. Each hierarchy level can have many children.
 - You can assign an analysis option combination to be the default value for the objective. This means that when a user drills down to the objective, the Objective report opens with this default value.
 - You can also set default KPI through Objective Designer, see: To define the attributes of an objective.
 - The color method in combination with the KPI performance determines the alarm color for the objective.
1. At the top level of the analysis option hierarchy, click Add.

ORACLE Performance Management Designer

Home Logout Preferences Diagnostics

Reporting Performance Measurement

Measures | Dimensions | Objectives | Simulations

Objectives > Update Minimize Contract Leakage >

Add Analysis Option

* Indicates required field

* Name: Option_0_1

* Description: Option_0_1

Default

Measure: <Default>

Modifies Dimension Set

Dimension Set: Dimension set 0

Selected Dimension: No Dimension Objects Available

Use Year To Date as Default

Cancel Apply

Note: To add an analysis option to a parent, click Add at the parent level. To add the analysis option to all analysis option combinations listed in the hierarchy, enable the Add to all KPI combinations check box

2. Enter a name and description for the analysis option.
3. Enable the Default check box to make the analysis option as the default analysis option.
4. Enable the Modifies Dimension Set check box if the analysis option is driven by a dimension set. Select the dimension set from the drop down menu.
5. In case of single bar objectives, select a measure to associate with the analysis option.

Rules to select measures

- At the parent level if the measure is not yet mapped then you can select preseeded and custom KPIs.
- At the child level you can select only custom KPIs.
- While updating analysis options, if you have previously mapped a measure to a custom KPI, then you can only remap the measure to custom KPIs. The same holds true for preseeded KPIs.

Important: In case of multi bar objectives a measure is associated with the series you define. You get to configure the measure while

updating or creating a series.

6. In case of single bar objectives, if you want to set the Year to Date (YTD) calculation as the default then select the check box Use Year to Date as Default.

Important: If this option is not enabled, then you cannot view the YTD option in the Objective report at all.

In case of multi bar objectives, you can configure YTD option while updating or creating a series.

7. Click Apply to save your work.

To define series for multi bar objectives:

Some KPIs are best displayed as a multiple series KPIs so you can view the measures separately on a single graph. For example, you may want to view all measures related to Inventory, such as Total Inventory, On Hand Inventory, In Transit Inventory, and WIP on a single graph. Each component of a multiple series KPI may be formatted with a separate color using one of several of stacking options to visually delineate the data even further.

General configuration rules to define series

- The objective *must* be of multi bar type.
- You can:
 - Define series for each analysis option combination.
 - Create multiple series that can be displayed with the Left Y-Axis or Right Y-Axis as the reference axis.
 - Select stack, if required, in case you define more than a series. If you select Stack, all the defined series are stacked one on top of another. Use this option for multiple series that you want to represent in a single bar broken in different related portions. To stack series, they must be of the same type (bar, lines, and so on).
 - Select if series has plan or benchmarks for reference.

Note: Represent plan and benchmarks as lines on the graph.

- Choose a default series. The default series drives the color of the objective.

Note: Apart from default series, other color methods can also be used to determine the color of the objective.

In case of multi bar objectives, a default series is created whenever you create an analysis option. The analysis option along with the series form an analysis option combination. You can either update the default series or create a new series.

1. Click Update to update the series. To add a new series, click Add series.

Name	Color
Actual Data	
Budget	
Prior Year	

2. Define the properties of the series as required. The following are the available options:
 - **Name:**Name of the series.
 - **Description:**Description of the series.
 - **Measure:**Select the measure associated with the series.
 - **Y Axis:**Display the reference axis Left or Right of the measure.
 - **Type:**Select the type of graph associated with the series. The available options are: Line, Bar, and Area.
 - **Enable Benchmarks for Series:**Enable this option if you want to display benchmarks in the objective report.
 - **Enable Plan for Series:**Enable this option if you want to display plan in the objective report.

- **Default:** Choose the series to be the default series.
Each series is plotted one above the other in the objective report only if:
 - You have selected the option Pre selected for all the listed series.
 - All series have the same reference axis and graph type.
 - **Use Year to Date as Default:** Enable this option to view YTD calculation in the objective report.
 - Select Stack, if required.
3. Customize colors for each benchmark: Actual Data, Budget, and Prior Year, if required, for each series.

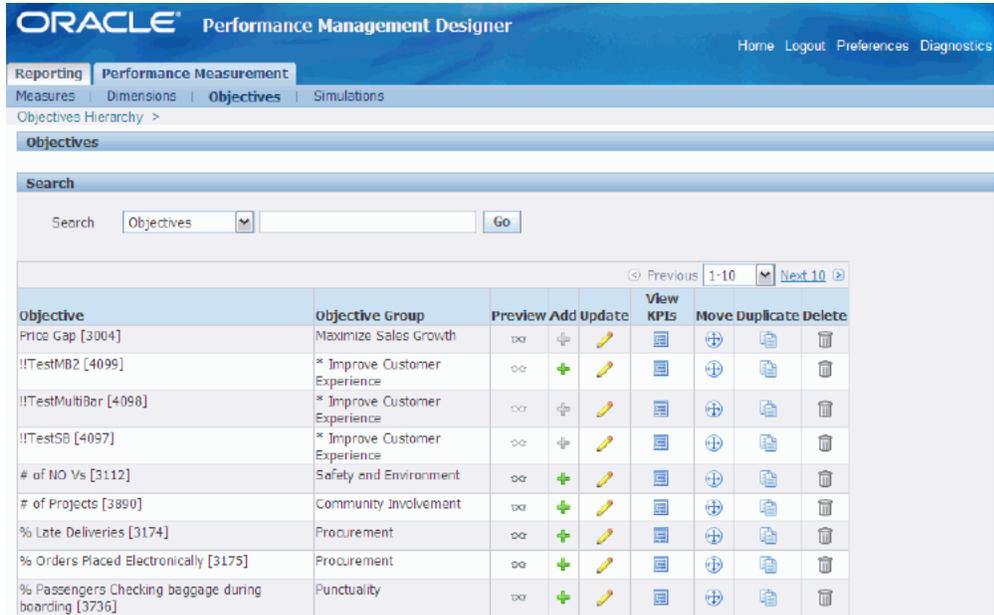
To customize colors

1. Click on the color displayed against a benchmark.
2. Choose a color from the color palette.
3. Click Apply to save the selected color.

To move an objective:

You can move an objective from one objective group to another. Moving an objective is analogous to the cut and paste operation done in any application.

1. Select the objective and click Move.



2. Choose the objective group to which you want to add the objective.
3. Click Apply to confirm the move.

To duplicate an objective:

You can duplicate or copy an objective from one objective group to another. Duplicating an objective is analogous to the copy and paste operation done in any application.

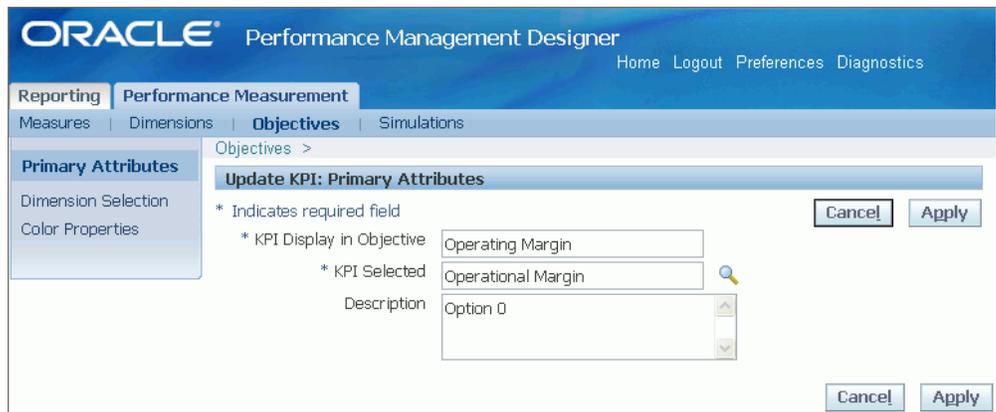
Important: If you want to move objectives across two system, then use the Migration module available in Performance Management Administrator. For more information about Migration, see Migration, page 11-1.

1. Select the objective and click Duplicate.
2. Edit the name and description of the objective if required and click Continue.
3. Click Update to map the target objective group to which you want to copy the objective. Click Apply to save your work.
4. Map the following entities of the selected objective: measures, fields, dimension objects, dimensions, and calendar. You can either use the existing entities or create the source entities as new in the target objective group. After completing the mapping process, click Apply.

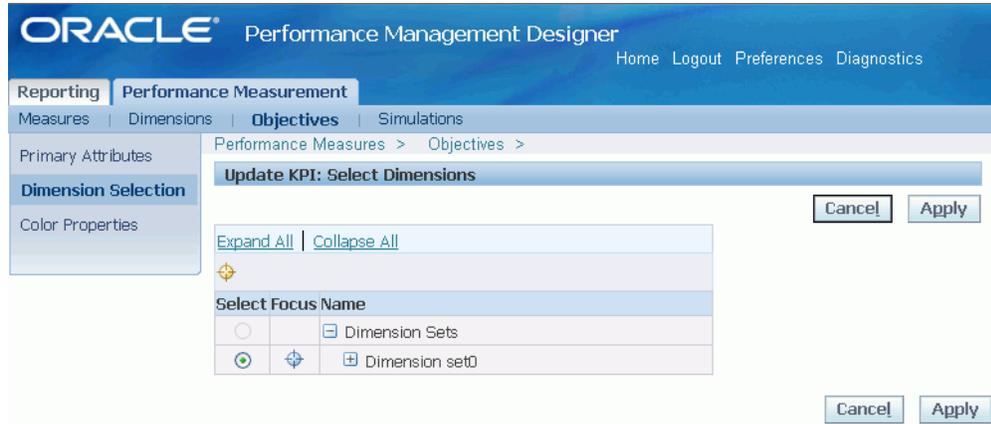


To define the attributes of each KPI:

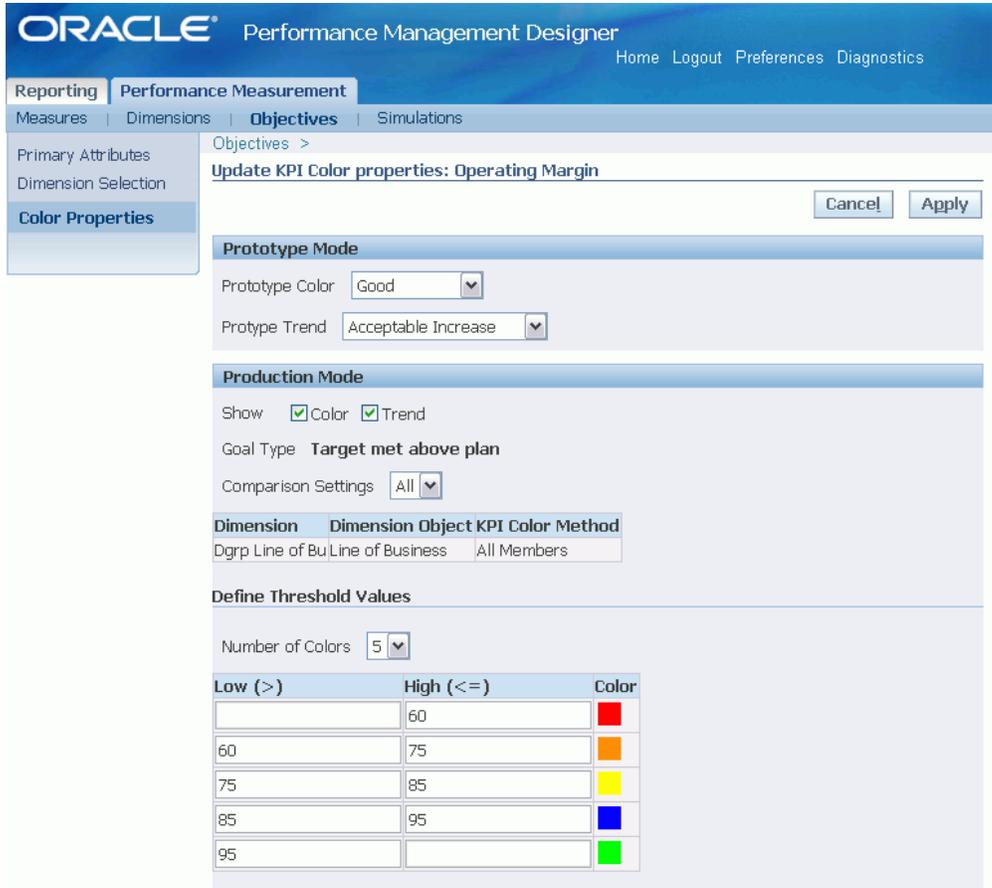
1. Navigate to Performance Measurement > Objectives Designer
2. Select the KPI and click Update.



3. 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.
4. Select a dimension set for the KPI. Each KPI can be assigned a different dimension set.



5. Define the Color Properties for each KPI.



To define color properties

1. Define the prototype color properties.
The prototype colors you define determine the color of the KPI when in prototype mode. The default Prototype color is Acceptable and the Prototype trend is Acceptable Increase.
2. To view colors and trends for KPIs in the Objective report and Scorecard views - detailed view and tree view, enable the color and trend check box.
3. Define color threshold values.

To define color threshold values

1. Choose the number of colors you want to use as alarms. The available options are three or five.
2. In the range table, define threshold values for each threshold level.

- You can define acceptable and marginal threshold values for each color.
- Additional colors are available for any KPI that uses goal type as Target met within ranges. You can define acceptable and marginal threshold values on either side of the range.

Example

For Example, let's say, for Inventory KPI the goal type selected is Target met within ranges and the number of colors to use as alarms is five. Then, there are nine threshold values you can configure. The table below shows sample configuration values, alarm colors, and interpretations of the values.

Range Table

Low (>= (Greater than or Equal to))	High (< (Lesser than))	Color	Interpretation of the color
	80	Red	Unacceptable as the available inventory value is only 80% of the planned value.
80	85	Orange	Critical as the inventory value has still not reached 100% of the planned value.
85	90	Yellow	Marginal improvement in performance of the KPI.
90	95	Blue	The inventory value has reached 95% of what was planned so the improvement is good.

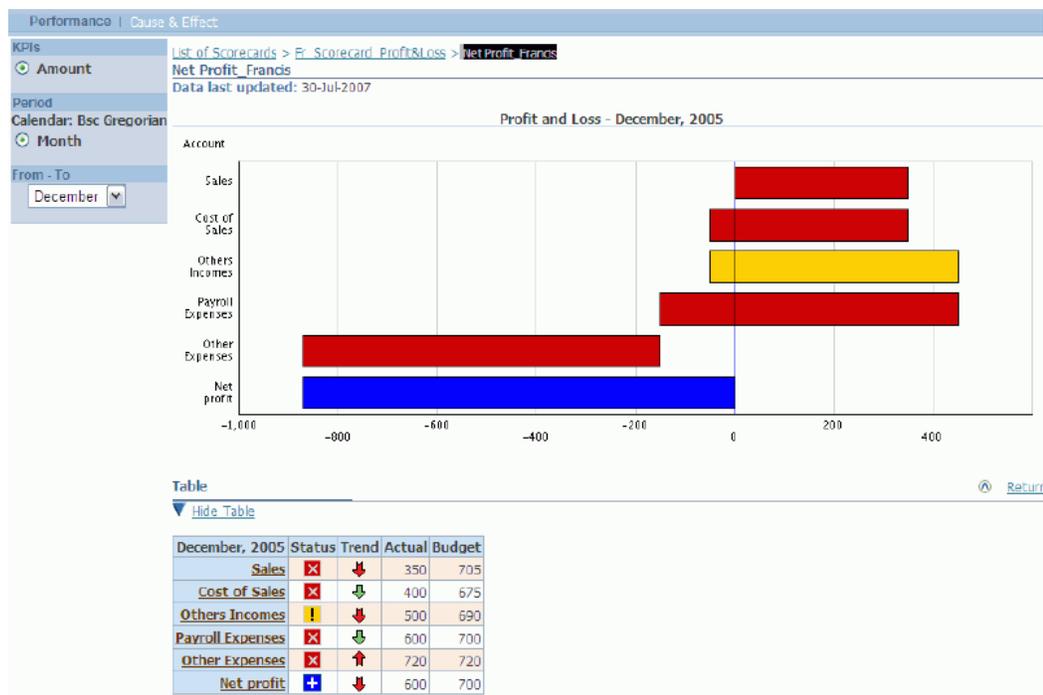
Low (>= (Greater than or Equal to))	High (< (Lesser than))	Color	Interpretation of the color
95	100	Green	There is 100% increase in inventory value so the performance is acceptable.
100	105	Blue	Inventory value has shot up by 105%, but still within limits, so the performance is still good.
105	110	Yellow	The performance of the KPI is marginal as the inventory value has shot up by 110%.
110	115	Orange	The performance of the KPI is critical as the inventory value has shot up by 115% .
115		Unacceptable	The performance of the KPI is unacceptable as the inventory value has increased phenomenally.

6. Click Apply to save your work.

Create Profit and Loss

The Profit and Loss objective displays accounts in the form of horizontal bars to provide the user with a graphical view of what accounts contribute to revenues, and what accounts consist of expenses. The bottom-most horizontal bar shows the total of revenues - expenses to show profits or losses.

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 as shown in the figure below. Revenue accounts start from the top, while expense accounts start below the last revenue account. The bottom-most bar displays the total difference between revenues and expenses.



Configuring the Profit and Loss objective is similar to configuring other objectives, except that the Profit and Loss objective is much more limited in the options that can be configured.

To configure the Profit and Loss indicator you must have the graph in trend mode, focusing on a specific account. To turn the Profit and Loss graph into a trend graph click on any of the horizontal bars which represent an account. Any of the account bars will suffice, as it is only necessary to view the objective as a trend graph.

Rules while configuring profit and loss objectives

- One sample Profit and Loss objective template comes with Oracle Balanced Scorecard. If you are planning to use a summary of your Profit and Loss in the

scorecard, do not delete this objective from your template.

- New Profit and Loss objectives cannot be added. However, you can copy an unlimited number of additional Profit and Loss objectives into the system from other BSC systems or duplicate Profit and Loss objectives (copied from the same system)
- Amount is the default Profit and Loss KPI available in the system.
- You *can not* add or create KPIs to the Profit and Loss objective.
- The Amount KPI 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 KPI may change doing that.
- The Amount KPI 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. You cannot update or delete both the "Dimensions" and the "dimension Objects" from the system. Icons for Update and Delete are disabled for Measures and Dimensions reserved for Profit and Loss KPIs.
- The default measure "Amount" cannot be deleted from the KPI since this is the only measure applicable for the objective. The Creation of new measures in the KPI is disabled, since "Amount" is the only measure that can be represented in this type of KPIs due to the nature of the objective.
- The default KPI Amount is the color alarm method set for the default objective Net Profit.
- The available calculations include Variation (from target), Parent, and YTD.
- The following data dimensions cannot be deleted from the Profit and Loss indicator, nor can they be modified in any way: Account Type, Account, and Sub-Account.

Note: Main account: You can load any company account whose data > 0 as the first account. If the first account loaded an expense account and its data < 0, the BSC will go to subsequent accounts until it finds the first available one with data > 0. This first positive account becomes the main account for purposes of alarm color calculation and view in the Objective report.

- Key Items may not be defined for any Profit and Loss objective. This means that the Profit and Loss objective cannot be configured to default to any specific dimension

value, account, or sub-account.

- Apart from the existing dimension set present in the template, you cannot add additional dimension sets. However, you can update the existing dimension set and add more dimensions.

To create Profit and Loss objectives:

1. Log into Oracle Applications using the Performance Management Designer responsibility.
2. Navigate to Performance Measurement > Objective Designer.
3. Search for the objective "Net Profit." This is the default Profit and Loss objective template available in the system. You can see it listed under the "Financial Perspective" objective group.
4. Create a copy (duplicate) of the objective. For more information on duplicate objectives, see: To duplicate an objective, page 3-40.

Tip: When you duplicate the objective, it is advisable not to change the default options presented on the screen.

5. Select the duplicated Profit and Loss objective and click Update.
6. Update the primary attributes of the objective as required.
7. Add dimensions to the existing dimension set if required.
8. Configure the color properties, period, and calculation of the objective as required.
9. Click Apply 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.

The screenshot shows the Oracle Performance Management Designer interface. The top navigation bar includes the Oracle logo and the text "Performance Management Designer". On the right side of the top bar are links for "Home", "Logout", "Preferences", and "Diagnostics". Below the top bar, there are tabs for "Reporting" and "Performance Measurement". Under "Performance Measurement", there are sub-tabs for "Measures", "Dimensions", "Objectives", and "Simulations". The "Dimensions" sub-tab is active, and within it, the "Calendars" option is selected in the left-hand navigation menu. The main content area is titled "Calendars" and contains a search box with a "Name" input field and a "Go" button. Below the search box is a "Create" button. A table lists existing calendars with columns for Name, Description, Created By, Last Updated, Details, Update, and Delete.

Name	Description	Created By	Last Updated	Details	Update	Delete
University Fiscal Year	University Fiscal Year	BSC	01-Jun-2005 14:34:36			
Bsc Gregorian		ORACLE	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 | Simulations

Calendars >

Create Calendar

Cancel Apply

* Name: Calendar BSC_DIM_1462
 * Internal Name: BSC_DIM_1462
 * Application: Progress Custom
 Description:

* Current Fiscal Year: 2007
 Beginning of Fiscal Year: January

Periods

Create

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

Cancel Apply

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.
9. Click Create to create a custom period.

ORACLE Performance Management Designer Home Logout Preferences Diagnostics

Reporting Performance Measurement Measures Dimensions Objectives Simulations

Create Period

* Name: Period PMD_2138

* Internal Name: PMD_2138

* Application: Progress Custom

Description: [Empty]

Base Period: Month

* Number of Periods: 1

Go

Period Start	End
1	1

Cancel Apply

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

10. Enter a description.
11. 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.
12. Enter the number of periods that you want to create.
13. 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.
14. Click Apply, to save the new custom period and return to the Create Calendar page.
15. Click Apply, to create the new calendar.

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:

1. Open BSC Architect > Performance Management Designer.
2. Open the objective to be modified.
3. Right-click mouse on the empty on the right panel below the calculations. The Objective menu appears.

Benchmarks

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

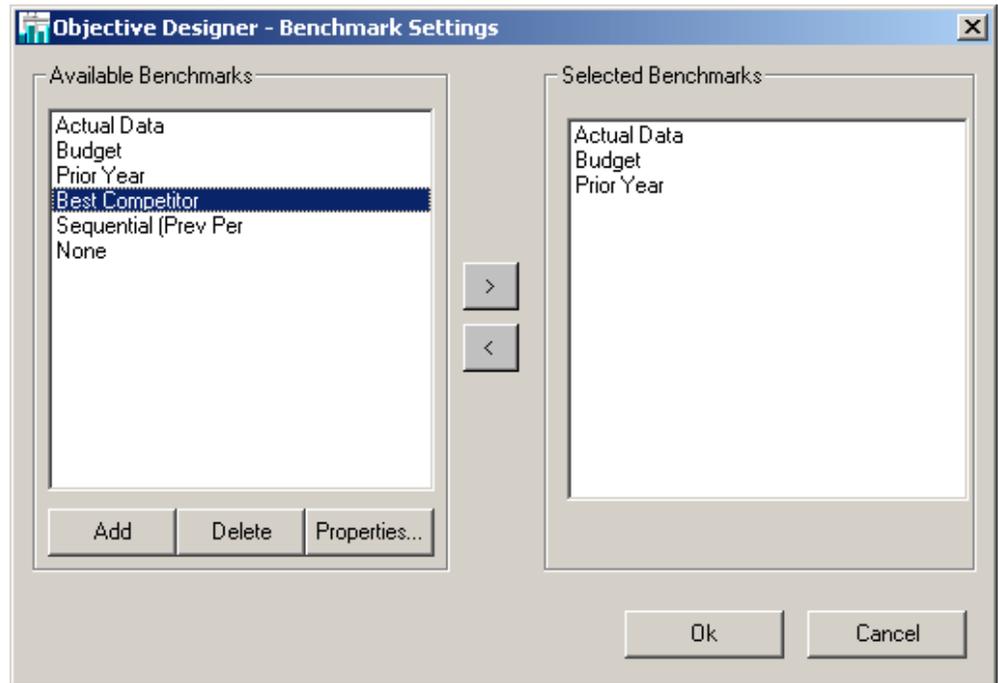
- **Budget:** The default benchmark for calculating alarm colors. It is defined as Data Type 1. This benchmark is populated with user-defined data, and can be renamed if necessary.
- **Previous Year:** Previous Year compares actual results with results from the previous year. Oracle Balanced Scorecard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

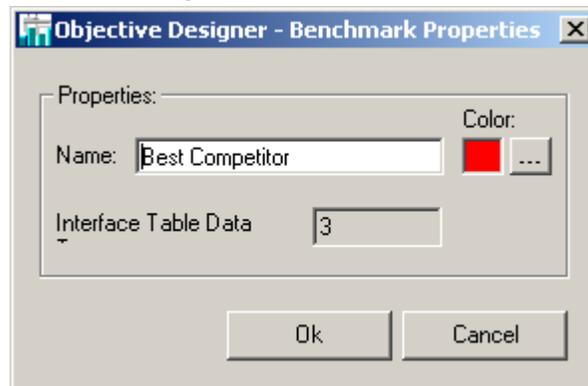
1. Right-click in the area beneath the KPI group panels, to display a menu.
2. Select Define Benchmarks to display the Benchmark Settings window. The left panel shows a list of available benchmarks. The right panel shows a list of the selected benchmarks.

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.

Benchmark Properties Window



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.

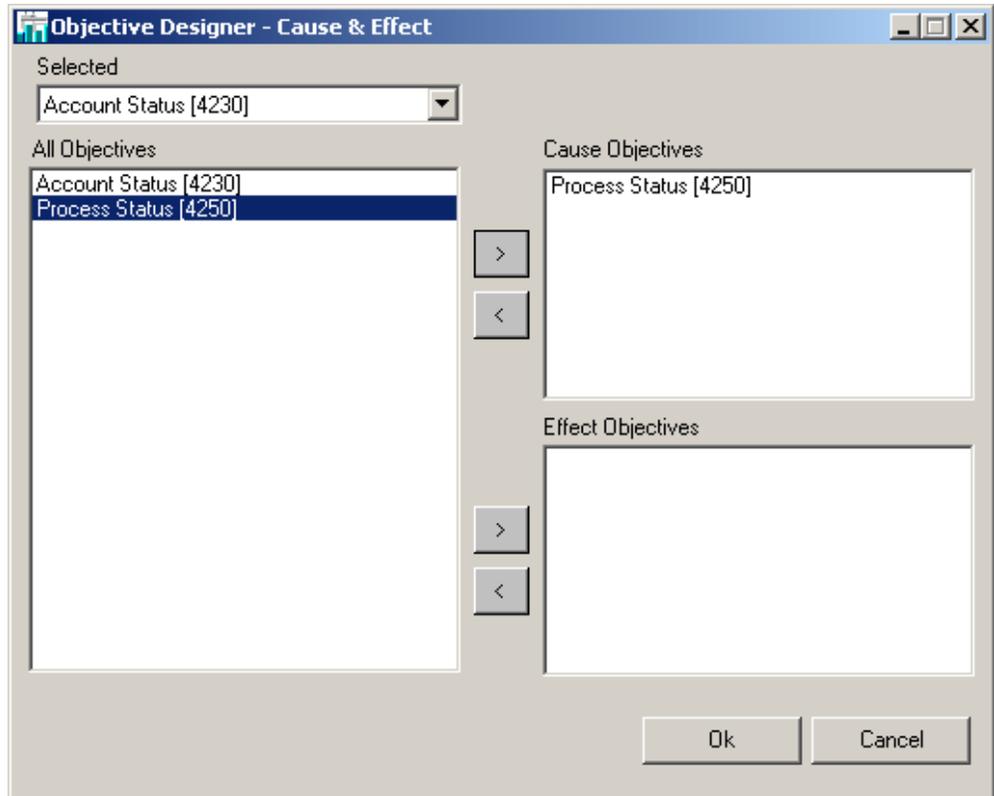
When designing balanced scorecards, it's important to think carefully about the relationships between objectives. The effectiveness of the Cause-Effects Matrices as an analysis tool depends on accurate assessment and documentation of these relationships by the scorecard designer. Cause and Effect is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

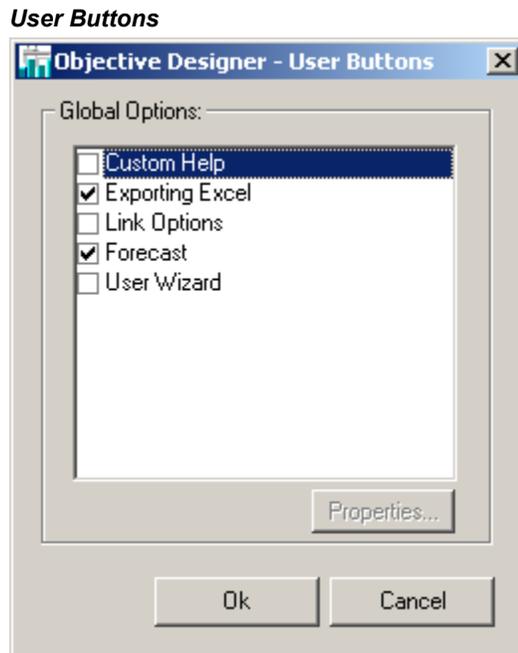


5. To remove an item from the Cause objective panel, select the left arrow button.
6. Move items to the Effect Objective panel by highlighting an item in the All objectives panel, then clicking the right arrow button beside the Effect objectives panel. The item is now listed with the Effect Objectives.

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

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.

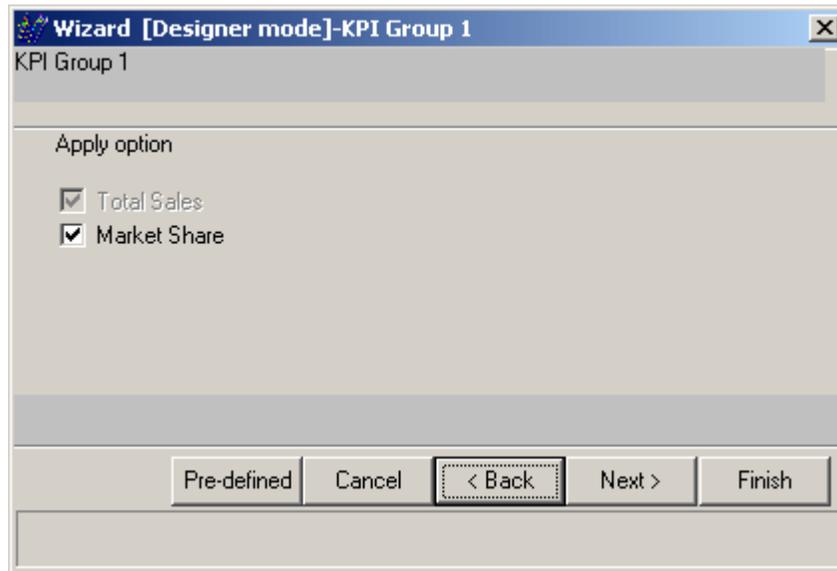
User Wizard

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 KPI groups (also known as analysis 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

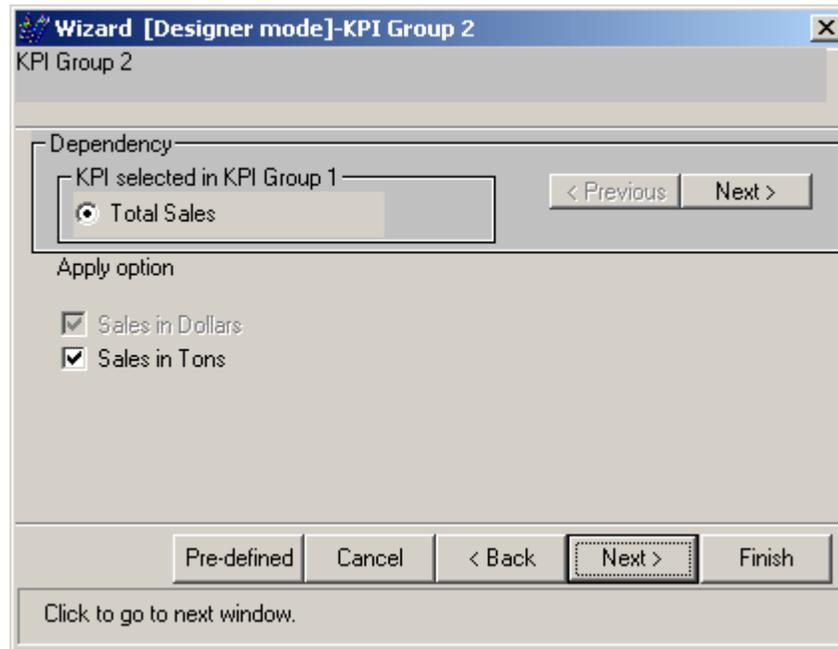


Use this window to select the options you want to configure. When you select options, you will be able to change the configuration of its dependent dimensions, periodicity, and calculations on subsequent screens.

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.

Tip: You can also use the Update Objective icon available in the Scorecard Designer to make the required changes.

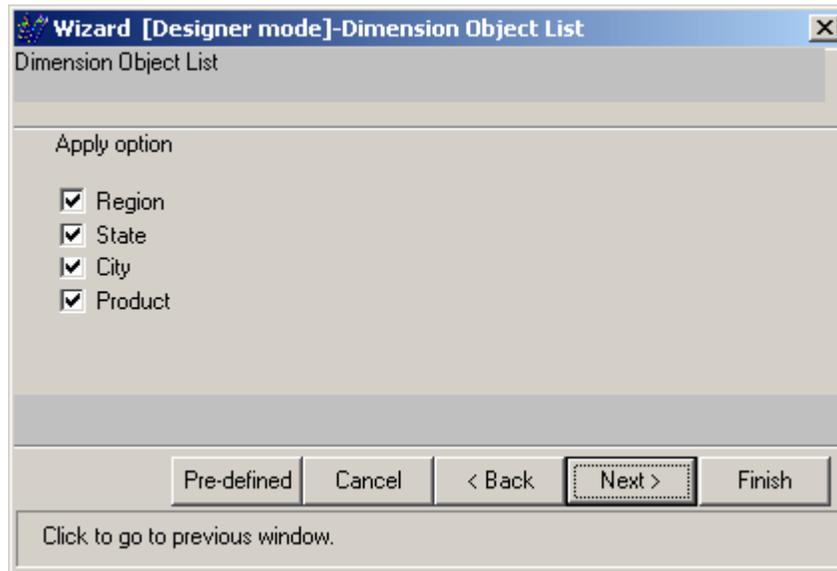
User Wizard, Child Options Window



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.

Tip: You can also use the Update Objective icon available in the Scorecard Designer to make the required changes.
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.

8. 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*.

Configuring Master and Shared Objectives in BSC Architect – Performance Objective 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. You can use Performance Objective 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 Objective 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 Objective 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.

Rules to Modify 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 cannot delete the 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 shared objective as described in the previous point.

Rules to 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*.

Identifying Master and Shared Objectives

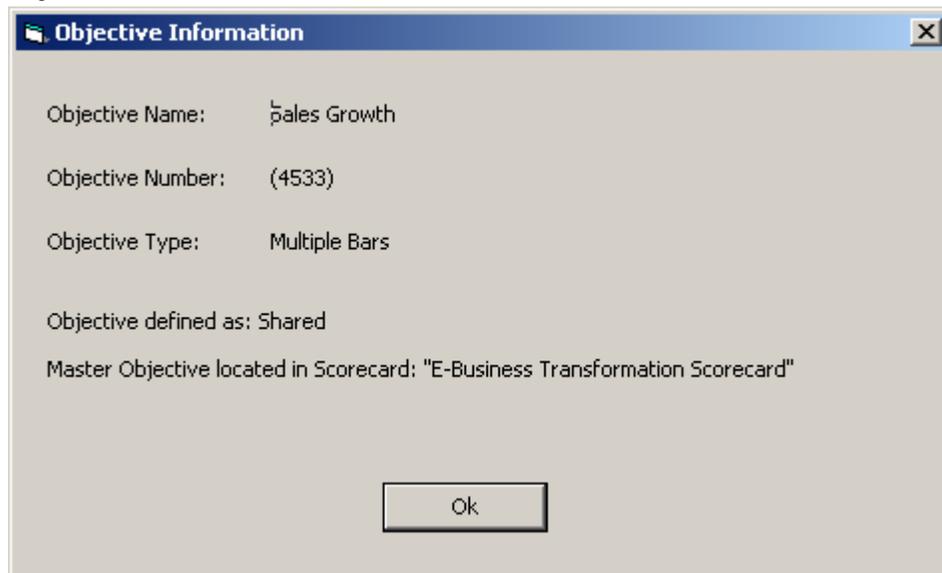
Since a master objective can reside in any scorecard, and shared objectives can also be selected in any scorecard without any restrictions, objective Designer has an Information window that allows designers to identify the type of objective being worked on.

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

To identify master and shared objectives:

1. Select your objective in BSC Architect > Performance Objective 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.

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*.

Simulation

Create Simulations

Simulation lets you simulate objective performance by creating multiple "what-if" scenarios. For example, assume you are trying to analyze the effect of increase in sales and decrease in expense, by certain percentages, on your profit margins. Simulation lets you play around with numbers, view consequence of your actions, and effectively plan your strategy.

Note: You can create simulations only in Materialized View architecture. For more information about Materialized View architecture: see, Set Up Global Parameters.

Prerequisites

- Create measures or KPIs
- Create dimension and dimension objects
- Create objective groups
- Create objectives
- Add KPIs to objectives

To create simulations:

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

3. Click Create.

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

The screenshot shows the Oracle Performance Management Designer interface. The top navigation bar includes 'ORACLE Performance Management Designer' and links for 'Home', 'Logout', and 'Preferences'. Below this is a breadcrumb trail: 'Reporting | Performance Measurement | Measures | Dimensions | Objectives | Simulations'. The main heading is 'Create Simulation: Primary Attributes'. A note states '* Indicates required field'. The form contains several fields: '* Name' (Simulation), '* Internal Name' (PMD_1186986559617), 'Created By' (WTUCKER), 'Description' (empty), '* Objective Group' (Vision Enterprises), 'Scorecard' (empty), and '* Background Image' (C:\Documents and Setting\...). There are 'Cancel' and 'Continue' buttons at the bottom right. A tip at the bottom indicates accepted formats: *.gif, *.jpeg, *.jpg, *.swf, *.svg.

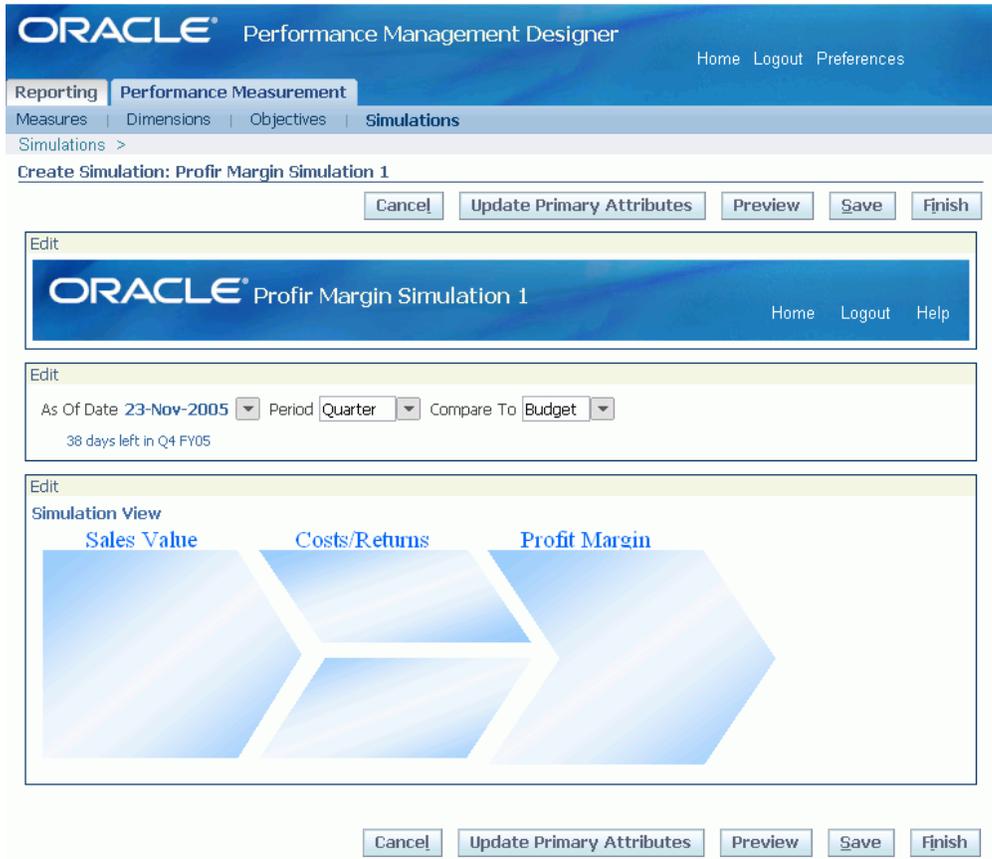
4. Enter a description for the simulation.
5. Select an Objective Group that you want to add the simulation to.
6. Select a Scorecard that you want to add the simulation to.

Note: You can also add simulations to scorecards using the Scorecard Designer. You cannot preview simulations unless they are attached to a scorecard. For more information about adding simulations to scorecards, see: [Add Simulations](#), page 2-8

7. Add a background image, and click Continue.

The background image can be a GIF, JPG, SWF, or SVG file. The maximum recommended size for the image is 2 MB.

8. You can edit the simulation title, add and edit parameters, and add simulation content as required.



9. Once you configure the title, parameters, and simulation content, click Save to save the simulation

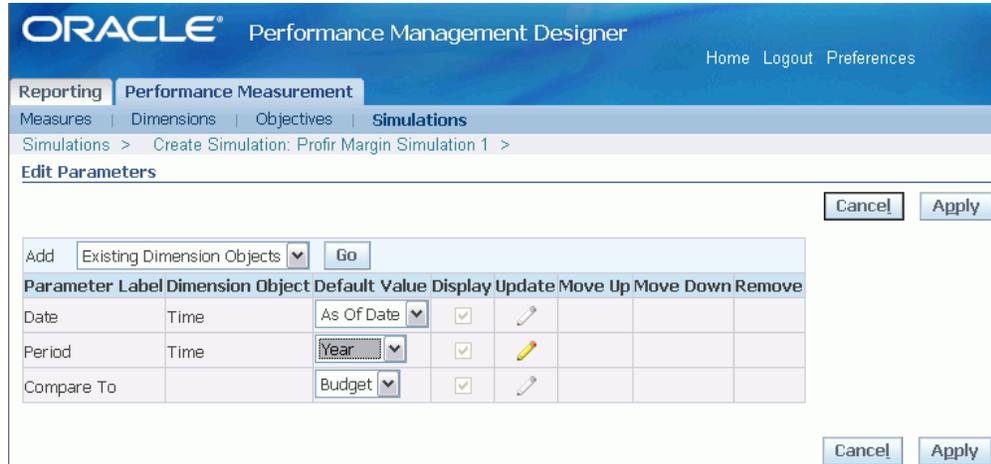
10. Click Finish to complete configuring the simulation.

Note: You can duplicate or copy a simulation from one objective group to another. Duplicating a simulation is analogous to the copy and paste operation done in any application.

To edit parameters:

When you create a simulation, you can see the following default parameters: As of Date, Period, and Compare To. You cannot delete these parameters. However, you can edit the default parameters and add additional parameters.

1. Click Edit in the second region.
2. Change the default value for the As of Date and Compare to parameters if required.



If you select the default value of Date parameter as From-To, then specify the periods you want to simulate the scenario. You can choose to update and display the period values.

Important: To use the Date parameter From-To, you must load data at the day level.

3. You can configure the Period parameter if required. To do this:
 1. Click Update.

Update Parameter: Period



2. Select a calendar from the drop down menu.
3. Select base periods. You can provide different labels if required.

4. Click Apply.
4. Set a default base Period value if required.
5. Add parameters to the simulation by adding existing dimensions and adding new and existing dimension objects.

To add existing dimensions and existing dimension objects:

1. Select either Existing Dimensions or Existing Dimension Objects from the drop down menu and click Go.
2. Select dimensions or dimension objects and click Apply.

Tip: Selecting a dimension adds all the dimension objects available under that dimension to the parameter list.

3. Provide default values for dimension objects if required.

To add new dimension objects:

You can add a new dimension object to the parameter list if required.

If you link the new dimension object to an existing dimension, the dimension is updated with the new dimension object. If you do not link the new dimension object to an existing dimension, then the system creates and links the dimension object to a default dimension.

1. Select Add New Dimension Objects from the drop down menu and click Go.

ORACLE Performance Management Designer Home Logout Preferences

Reporting | Performance Measurement

Measures | Dimensions | Objectives | **Simulations**

Simulations > Create Simulation: Profit Margin Simulation 1 > Edit Parameters >

Add New Dimension Object

Create a new dimension object to be used as a parameter.

* Indicates required field

* Name:

* Internal Name:

* Application:

Description:

Dimension:

Prototype Values

These values will be used for prototyping purposes until you are in production mode.

Value	Remove/Enable
All	<input checked="" type="checkbox"/>
<input type="text" value="Option 1"/>	
<input type="text" value="Option 2"/>	
<input type="text" value="Option 3"/>	
<input type="text" value="Option 4"/>	
<input type="button" value="Add 5 Rows"/>	

2. The Name and Internal Name fields are populated by default. You can edit them if required.
3. Enter a description of the dimension object.
4. If you want to add the dimension object to an existing dimension, select the dimension.
5. Provide prototype values for the dimension object.
6. Provide a default value for the dimension object if required.
7. Click Apply to save your work.

To add content to simulation:

1. Click Edit in the third region.



2. Select KPI, Formula, Label, or Launch Pad from the Add menu. Then click Go.

- **KPI:** Add one or more KPIs to the simulation. You do not need to add all of the KPIs that have been assigned to the scorecard. Instead, you can choose KPIs that determine how a KPI affects the performance of other KPIs. This enables you to create simulation scenarios that may have different KPIs.

By default, the KPI alarm color, KPI label, KPI value, and a text box are placed on the view. Scorecard viewers can click the alarm color, or label to drill down to the Objective report. The user can use the text box to increase or decrease the value of a KPI by a percentage value. The user can also input negative percentages.

To edit the KPI:

- Modify the label's text and font.
- Modify KPI color properties.
- Apply cumulative Year to Date calculation.
- Modify the node properties.
- Drag and drop the alarm color, label, and text box anywhere in the view.
- **Formula:** Create calculated KPIs to create formula expressions between two or more KPIs For example, to compute Net Profit you can use Revenue and Expenses KPIs to create a calculated KPI that is defined as (Revenue – Expenses).

By default, the calculated KPI label, value, and alarm color are placed on the view. Scorecard viewers can click the alarm color, or label to drill down to the Objective report.

Tip: To create a meaningful simulation, you should typically

use several calculated KPIs with formulas that interrelate, so that when one KPI is simulated, the other KPIs show the impact based on the formula.

To add a Calculated KPI:

1. In the Add drop down menu, select Formula.

Important: You must add at least one KPI to the simulation content before adding a calculated KPI.

The screenshot shows the 'Add Formula Node' dialog in the Performance Management Designer. The dialog is titled 'Performance Management Designer' and shows the path 'Simulations > Update Simulation: Profit Margin Simulation1 > Add Formula Node'. It contains fields for Name (Calculated KPI 1), Internal Name (PMD_1186989373111), Application (Balanced Scorecard), Functional Area (Customer Defined), and Description. Below these fields is a 'Formula' section with an 'Available Columns' list (Profit Margin, Fulfilled Value, Returns Value, Cost of Goods Sold), an 'Add' button, a 'Remove' button, a formula editor with a toolbar (+, -, *, /, (,), ^, Validate), and a 'Description' field. 'Cancel' and 'Apply' buttons are at the bottom right.

2. Enter a name and description for the calculated KPI.
3. Define the formula by adding the KPIs from the Available Columns region to the Formula region and by selecting operands. The Description region shows the KPI formula using the internal names.

Important: Only the KPIs added to the simulation content are available for selection in the Available Columns region.

You can include numeric values while defining a formula.

4. Click Validate to ensure that the formula is correct.
 5. Click Apply to save your work. You can modify the properties for the calculated KPI just as for any other KPI.
- **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. Once you add a launch pad, you can drag and drop it anywhere on the view.
3. Click Save to save the changes.
 4. Click Apply to apply the changes.

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 5-1
- List of Objectives Portlet, page 5-3
- Custom View Portlet, page 5-5

Objective Graph Portlet

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



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 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 portlet displays the KPI graph based on the objective color method. If the objective color method is weighted average, the portlet displays the default KPI graph.
- 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, KPIs, 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.

ORACLE Performance Management Administration
 Home Logout Preferences Diagnostics

Global Setups Database Data Loader Session Management Security Migration

End Users Designers

Administer End User Access

Search

Responsibility

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

Focus Name	Assign/Unassign	Details	Access
<input type="checkbox"/> Root Node			
Supplier Drop Ship, Operations	<input type="button" value="+"/>	<input type="button" value="Details"/>	
Supplier Engineer	<input type="button" value="+"/>	<input type="button" value="Details"/>	
Supplier Manager	<input type="button" value="+"/>	<input type="button" value="Details"/>	
Supplier Profile & User Manager	<input type="button" value="+"/>	<input type="button" value="Details"/>	
Supplier Profile Administrator	<input type="button" value="+"/>	<input type="button" value="Details"/>	
Supplier Profile Administrator Vision Germany	<input type="button" value="+"/>	<input type="button" value="Details"/>	
Supplier Profile Administrator, Progress S&L	<input type="button" value="+"/>	<input type="button" value="Details"/>	

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.

ORACLE Performance Management Administration
 Home Logout Preferences Diagnostics

Global Setups Database Data Loader Session Management Security Migration

End Users Designers

Security: End Users >

Assign / Unassign Scorecards

Responsibility **Supplier Profile Administrator**

Search

Scorecard

1-10

[Select All](#) | [Select None](#)

Select Scorecard

<input type="checkbox"/>	E-Business Transformation Scorecard
<input type="checkbox"/>	Product Development Scorecard
<input type="checkbox"/>	Supply Chain Scorecard
<input type="checkbox"/>	Procurement Scorecard
<input type="checkbox"/>	Consumer Products
<input type="checkbox"/>	R&D Scorecard

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"/> Ag Report Practice	Scorecard	[?]
<input type="checkbox"/> Airline 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

User	User ID	*New Role	Start Date	End Date	Remove
Blake, Jo	JBLAKE	User	27-Aug-2007		

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

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 backup that is transparent to users. With the materialized view architecture enabled, data is automatically refreshed from one summarization level to another. In case of summary level architecture you 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 "#".

- **Company Logo:** You can import a company logo or image to appear at the top of every scorecard. By default, the Use Default Logo option will be selected. If you want to use a custom logo then you need to select a GIF or JPG file preferably of 340 x 100 pixels or smaller. If your logo is larger than the specified size, the application can accommodate the picture on the window taking space reserved for other elements on the graphs or views.

Note: Note that the company logo appears on the scorecard and objective reports only if there is no logo specified for the scorecard.

- **Pie Chart:** Displaying a comparison graphs as pie charts can be difficult if there are too many values in the graph. Therefore, to improve the ability to display and interpret pie charts, you can now specify the number of slices that you want to display. At the design level, you can set the default number of slices that you want to appear in all pie charts. Viewers can further limit the number of slices to be displayed for a particular pie chart. Global Setup page allows you to select between All or the number of slices to be displayed.
- **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.

- **Color Properties**

- **Performance Calculation Method:** If you want to express performance as greater than 100% for data that is Acceptable Below Plan, the administrator can specify that the performance can be greater than 100% in the Global Setup form. Otherwise, Default Calculation method will be used across all objectives. If you do express performance as greater than 100%, the Percent and Variation calculations are affected. For example, if a company plans expenses of \$120,000 for the month, but spends \$55,000 and saves \$65,000, then performance is good. Typically, the percent and variation calculation $((\text{actual} - \text{plan} / \text{plan}) + 1)$ would result in a performance of 45.8%. However, the company performance could also be calculated using another method $((\text{Plan} - \text{Actual}) / \text{Plan}) + 1$ with a result

of 154%, which can be expressed as either 54% over performed or 54 % saved.

- **Performance Assessment Color Definition:** You can customize alarm colors and specify weighted equivalent or numeric equivalent for alarm colors. You can also customize the color to be displayed for no data and no color. Also, the number of performance color bands can be set to either 3 or 5 as required. To do this, select 3 or 5 from the Edit drop down. These settings hold good for all KPIs and objectives in the system. In case of multi-bar objectives the designer can define colors for each series.
- **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 Components and Tables Documentation
- Monitor Requests
- Generate Database Data Roll Up Methodology
- 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 'ORACLE Performance Management Administration' and links for 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this is a menu with 'Global Setups', 'Database', 'Data Loader', 'Session Management', 'Security', and 'Migration'. Under 'Database', there are sub-links for 'Generate', 'Components', 'Tables', and 'Requests'. The main content area is titled 'Current Status' and contains a table with the following data:

Objectives, Reports and Simulations Requiring Data Reload and Summary Refresh	23
Objectives, Reports and Simulations Requiring Summary Refresh	0
Objectives, Reports and Simulations Pending Deletion	0
Advanced Summarization Level Update	No

There are two 'Generate Database' buttons on the right side of the table.

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

- **Objectives, Reports and Simulations Requiring Data Reload and Summary Refresh:** The number of objectives, simulations, and generated source reports that require changes to the structure of their input tables or summarization levels. If you have objectives, simulations, and reports that fall into this category, you must reload data for the affected objectives, simulations, and reports.
- **Objectives, Reports and Simulations Requiring Summary Refresh:** The number of objectives, simulations, and generated source reports that require data to be refreshed. You do not need to reload data for these objectives, simulations, and reports. Instead, you must run the recalculate process when you perform the data load so that the data is updated accordingly.
- **Objectives, Reports and Simulations Pending Deletion:** The number of objectives, simulations, 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, simulations, 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 and simulations 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 7-1.
- Ensure that all objectives and simulations are assigned to at least one scorecard.
- Ensure that all Architect (including migration) and Designer sessions are closed. See: User Sessions, page 10-1.

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.** Builds and configures the tables for all objectives in the system - changed, and unchanged.
- **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. You must reload your data if you select this option for objectives in production mode.
- **Process selected objectives.** Builds and configures the tables for selected objectives in the system - changed, and unchanged.

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.** Builds and configures the tables for selected reports in the system - changed, and unchanged.
- **Process selected simulations.** Builds and configures the tables for selected simulations in the system - changed, and unchanged.

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

If the above processes is not a first time run, the GDB creates a backup of existing database objects for the selected simulations, truncates the existing objects and regenerates them. You must reload your data if you select any of the above options for

objectives, simulations, and reports in production mode.

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 Components Tables Requests

Components Generation Method Schedule

Generate Database: Generation Method

Cancel Back Step 2 of 3 Next

Search

Search Objective Go

Add Objectives Previous 1-10 Next 10

Name	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			

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

For each objective and simulation, 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 | Components | 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 | Components | Tables | Requests

Update: Profit Margin Report [4069]

Cancel Apply

Implementation Type

Materialized Views
 Analytic Workspaces

Cancel Apply

Possible implementation types are:

- **Materialized Views.** Stores summary data for the required objective, simulation, or generated source report in Materialized Views. This is the default implementation type for all objectives, simulations, 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. You need to reload data every time the summarization level is modified.

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

Analytical Workspaces architecture is essentially recommended for Objective, Simulation, or 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 Setups Database Data Loader Session Management Security Migration

Generate Components Tables Requests

Components Generation Method Schedule

Generate Database: Schedule

Cancel Back Step 3 of 3 Finish

Options Process immediately
 Schedule

Start Date 27-Aug-2007
Start Time 04 55 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 8-12.

Review Components and Tables Documentation

The screenshot shows the Oracle Performance Management Administration interface. The top navigation bar includes 'Global Setups', 'Database', 'Data Loader', 'Session Management', 'Security', and 'Migration'. The 'Database' menu is expanded to show 'Generate', 'Components', 'Tables', and 'Requests'. The 'Review Tables' page is active, featuring a search bar and a table of tables. The table has columns for 'Table Name', 'Table Type', 'View Columns', 'View Components', 'View Dependencies', and 'Rename'. The 'View Columns', 'View Components', and 'View Dependencies' columns contain icons representing their respective views. The 'Rename' column contains a pencil icon.

Table Name	Table Type	View Columns	View Components	View Dependencies	Rename
BSC_B_1	Summary				
BSC_B_10	Summary				
BSC_B_100	Summary				
BSC_B_101	Summary				
BSC_B_102	Summary				
BSC_B_103	Summary				
BSC_B_104	Summary				

When the scorecards are in production mode, you can view the generated system documentation by navigating to Database > Components 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, Simulation, and Report, or Objectives, Simulations, and Report by Interface Table
- Columns in each table
- View Components
- 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 Components	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



The screenshot shows the Oracle Performance Management Administration interface. The top navigation bar includes 'ORACLE Performance Management Administration' and links for 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this is a menu with 'Global Setups', 'Database', 'Data Loader', 'Session Management', 'Security', and 'Migration'. The 'Database' subtab is active, and the 'Requests' subtab is selected. The 'Monitor Requests' section has a 'Show' dropdown set to 'Last 24 Hours' and a 'Go' button. The table below shows two completed requests:

Status	Name	Phase	Schedule Date	Details	Output	Request ID
✓	PMA Database - Generate Documentation	Completed	27-Aug-2007 03:47:19			4357997
✓	PMA Database - Generate Database	Completed	27-Aug-2007 03:46:22			4357996

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.

Generate Database Data Roll Up Methodology

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 Customer

then 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 - Product

then 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, Simulations, or Reports
- Delete Objective, Simulation 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, simulations, 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.

Note: To set excel macro settings, see: Note: 453492.1 on Oracle *MetaLink*.

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 8-4
 - Review the generated table structure. See: Generate Database, page 8-10
 - Ensure that other designers and administrators are not using the dimension or locking the entire system. See: User Sessions, page 10-1
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.

ORACLE Performance Management Administration Home Logout Preferences Diagnostics

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

Dimension Objects | Components | Interface Tables | Calendars | Requests

Dimension Objects View Invalid Records

Search

Search

Select Dimension Objects:

[Select All](#) | [Select None](#)

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 Site	∞∞	BSC_D_POA_SUPPLIER_SITES_V					
<input type="checkbox"/>	Supplier	∞∞	BSC_D_SUPPLIER	BSC_DI_126	Incremental			
<input type="checkbox"/>	Suppliers	∞∞	BSC_D_SUPPLIERS	BSC_DI_1773	Full			
<input type="checkbox"/>	Supplier Site	∞∞	BSC_D_SUPPLIER_SITE	BSC_DI_247	Incremental			
<input type="checkbox"/>	Supply Network	∞∞	BSC_D_SUPPLYNETWORK HTS	BSC_DI_1820	Incremental			

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

To enter data manually:

- 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 | Components | Interface Tables | Calendars | Requests

Data Loader: Dimension Objects >

View Data: Supplier

Update Data Printable Page

Search

Search User Code Go

User Code ▲	Code	Name
1	1	CbSp1
2	2	CbSp2
3	3	CbSp3
4	4	CbSp4
5	5	CbSp5

Update Data Printable Page

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

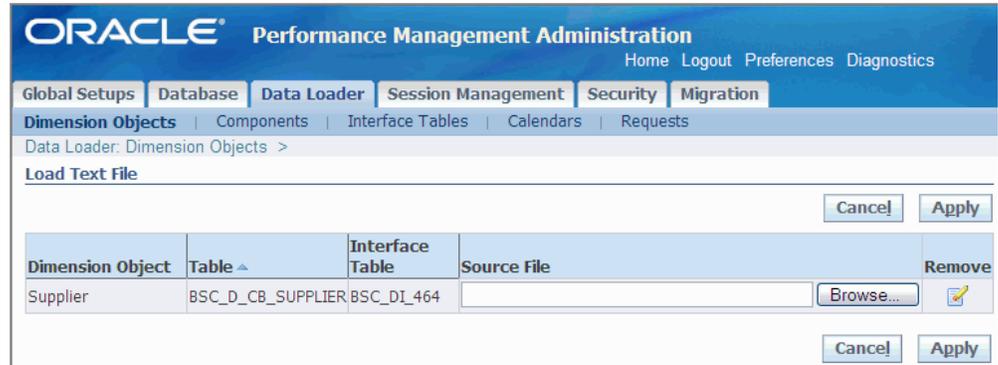
Important: All listed fields presented while updating dimension objects are mandatory. User code and name are key columns and must be unique.

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.

4. Click Apply to save your work.

To load data from a text file:

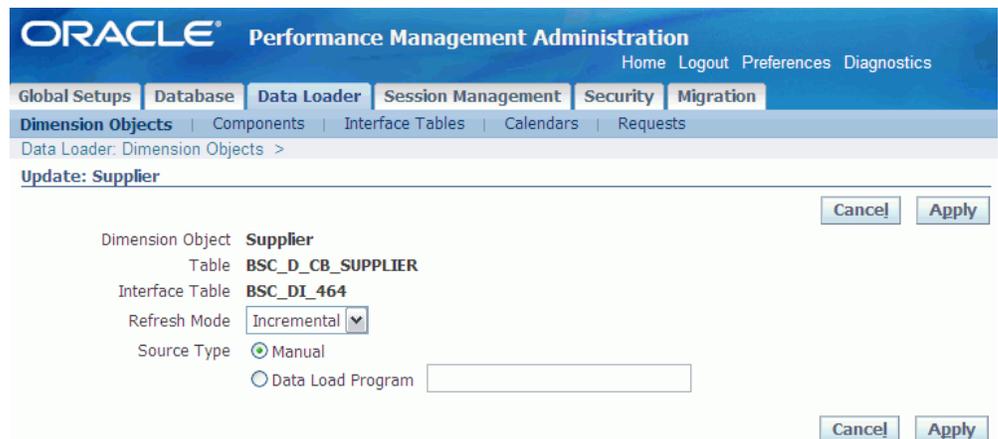
1. For the selected dimension object, prepare the text file using the same format as the dimension interface table.
2. Select the required dimension objects.
3. Click Load Text File.



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 Dimension Object, click Update.



2. Select Data Load Program, and enter the PL/SQL program you have created to load the data.

Note: The data load program must be available from the APPS schema. The load dimension program populates the relevant Dimension Interface and Objective Interface tables as follows.

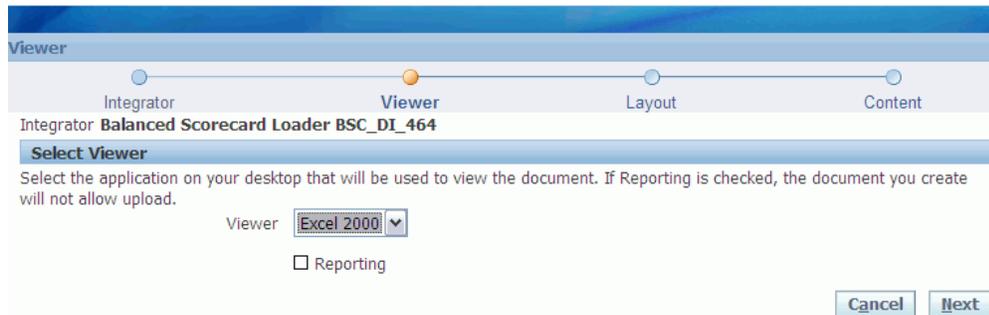
- Dimension Interface tables (BSC_DI_XXXX) contain all new or changed Dimension Object members. The load program must populate the User Code and Name columns in these tables.

- Objective Interface tables (BSC_I_XXXX) contain data for all measures. The load program must populate the Dimension ID, Year, Period, Type, and Measure columns in these tables.

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, simulations, 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.

To set excel macro settings, see: Note: 453492.1 on Oracle *MetaLink*.

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 8-4
- Review the generated table structure. See: Generate Database, page 8-10
- Ensure that other designers and administrators are not working on your interface tables or locking the entire system. See: User Sessions, page 10-1

1. Navigate to Data Loader > Interface Tables.
2. Query the tables that you want to load.

The screenshot shows the Oracle Performance Management Administration interface. The top navigation bar includes 'Global Setups', 'Database', 'Data Loader', 'Session Management', 'Security', and 'Migration'. The 'Data Loader' tab is selected, and the 'Interface Tables' sub-tab is active. A search bar is present with a 'Go' button. Below the search bar, there are buttons for 'Load Text File' and 'Refresh Summaries'. A table lists interface tables with columns for 'Table Name', 'Calendar', 'Period', 'Year', and 'Last Update'. The table contains four rows of data for tables BSC_I_1, BSC_I_10, BSC_I_100, and BSC_I_101. Each row has a 'Select' checkbox, a 'Data Load Program' column, and 'Update' and 'Excel' icons.

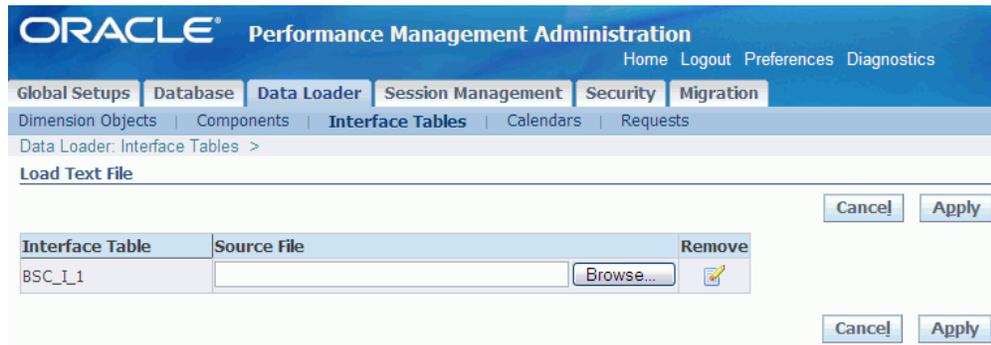
Select	Table Name	Calendar	Period	Year	Last Update	Data Load Program	Update	Create Excel
<input type="checkbox"/>	BSC_I_1	Bsc Gregorian	Month	2004	January (1)			
<input type="checkbox"/>	BSC_I_10	Bsc Gregorian	Month	2004	January (1)			
<input type="checkbox"/>	BSC_I_100	Bsc Gregorian	Month	2004	January (1)			
<input type="checkbox"/>	BSC_I_101	Bsc Gregorian	Month	2004	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:

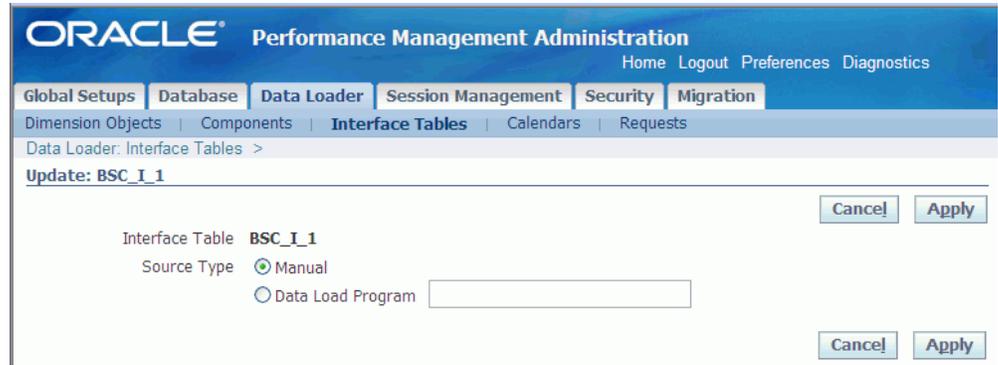
1. Prepare the text file using the same format as the interface table. Provide the user code for each of the dimension object columns of the interface table.
2. Select the required tables.
3. Click Load Data from Text File.



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 PL/SQL program you have created to load the data.



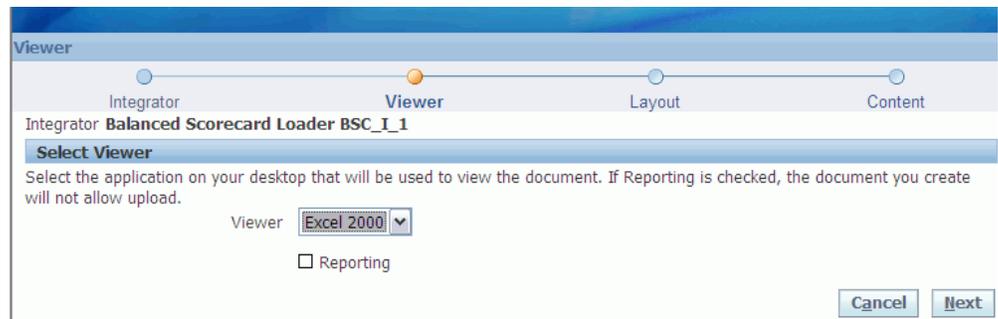
Note: Make sure the data load program specified is available under the APPS schema.

For more information about loading data from a program, see: *To load data from a program* in the *Load Dimension Objects* section.

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.



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.

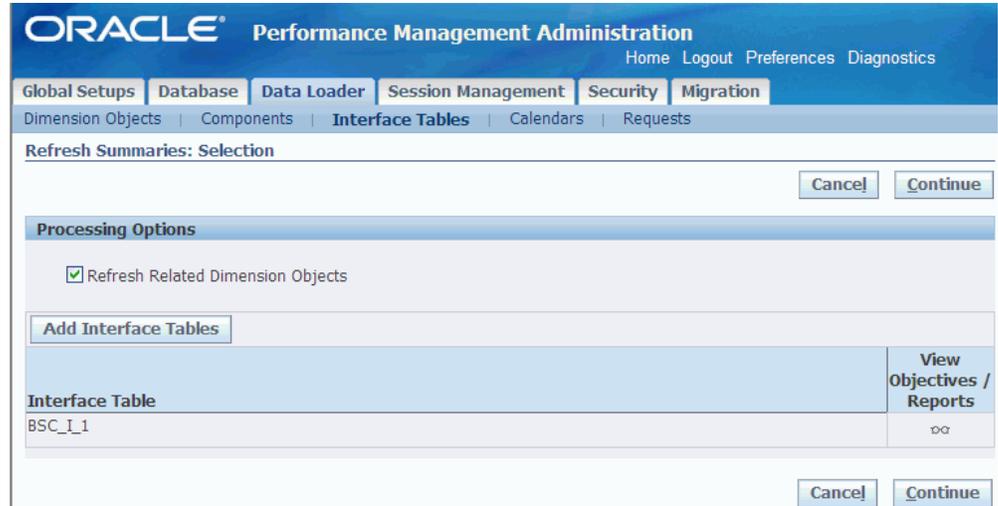
11. Click Close.

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.



- 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.

- Review the list of interface tables that are being refreshed, and then click Continue.
- 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, Simulations, or Reports

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

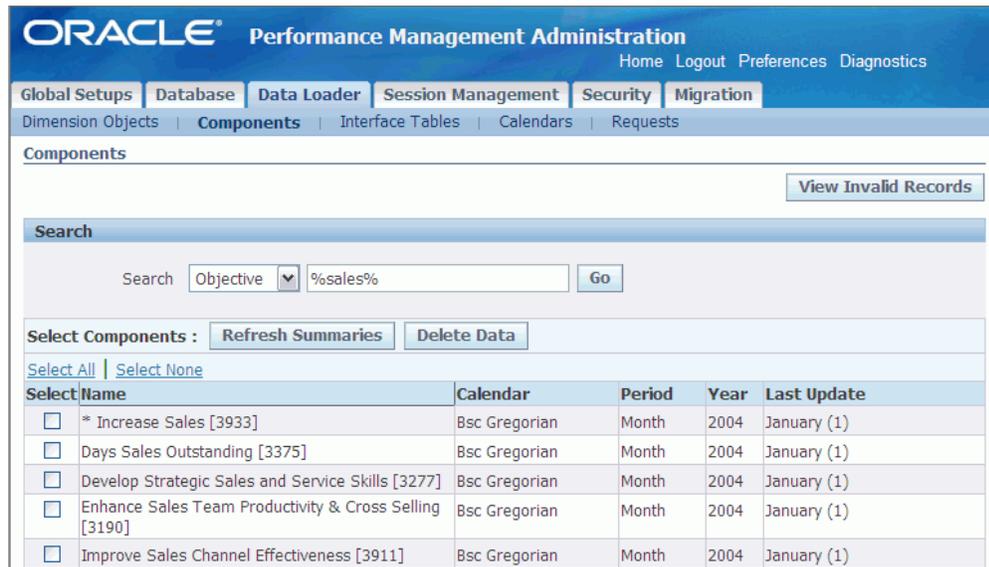
Prerequisites

- Complete the Generate Database process for your objectives. See: Generate Database, page 8-4
- Review the generated table structure. See: Generate Database, page 8-10
- Ensure that other designers and administrators are not working on your objectives or locking the entire system. See: User Sessions, page 10-1

To load objectives, simulations, or reports:

1. Navigate to Data Loader > Components.
2. Query the objectives, simulations, or reports that you want to load.

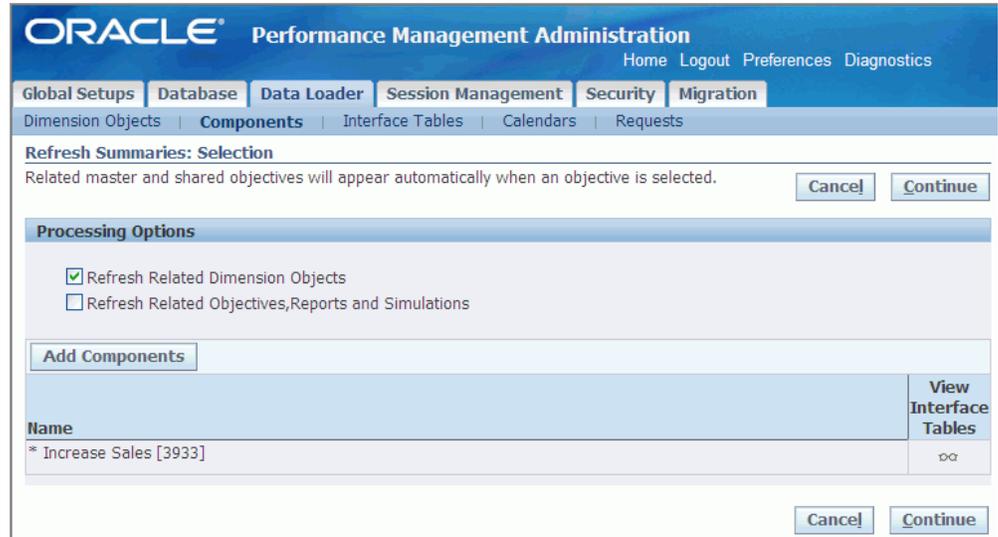
Make sure you have uploaded data or associated a data load program to the corresponding interfaces tables of the selected objectives, simulations, or reports, before refreshing summaries. Otherwise, the Data Loader will not process any new records. To find out the interface tables associated to an objective or report, see: Review Components and Tables Documentation, page 8-10.



The screenshot shows the Oracle Performance Management Administration interface. The top navigation bar includes "ORACLE Performance Management Administration" and 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 "Data Loader" tab is active, and the "Components" sub-tab is selected. The main content area is titled "Components" and features a "View Invalid Records" button. A search bar is present with a dropdown menu set to "Objective" and a search field containing "%sales%". Below the search bar are buttons for "Refresh Summaries" and "Delete Data". A table lists components with columns for "Select", "Name", "Calendar", "Period", "Year", and "Last Update".

Select	Name	Calendar	Period	Year	Last Update
<input type="checkbox"/>	* Increase Sales [3933]	Bsc Gregorian	Month	2004	January (1)
<input type="checkbox"/>	Days Sales Outstanding [3375]	Bsc Gregorian	Month	2004	January (1)
<input type="checkbox"/>	Develop Strategic Sales and Service Skills [3277]	Bsc Gregorian	Month	2004	January (1)
<input type="checkbox"/>	Enhance Sales Team Productivity & Cross Selling [3190]	Bsc Gregorian	Month	2004	January (1)
<input type="checkbox"/>	Improve Sales Channel Effectiveness [3911]	Bsc Gregorian	Month	2004	January (1)

3. 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, Reports and Simulations option if you want to refresh the objectives, reports, or simulations that share common tables with the selected objectives, reports, or simulations.
6. Review the list of objectives, simulations, 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, Simulation or Report Data

You can delete data for objectives, simulations, 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, simulation, or report data:

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

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

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

Advance Calendar



The screenshot shows the Oracle Performance Management Administration web interface. The top navigation bar includes 'ORACLE Performance Management Administration' and links for 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this is a menu with 'Global Setups', 'Database', 'Data Loader', 'Session Management', 'Security', and 'Migration'. The 'Data Loader' menu is expanded to show 'Dimension Objects', 'Components', 'Interface Tables', 'Calendars', and 'Requests'. The 'Calendars' section is active, displaying a table with the following data:

Calendar	Type	Data Range	Current Year	Advance Current Year
Bsc Gregorian	Pre-Defined	2004	2004	
DBI Enterprise Calendar	Pre-Defined	2007	2007	
DBI Gregorian Calendar	Pre-Defined	2007	2007	
DBI Period 445 Calendar	Pre-Defined	2007	2007	
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:

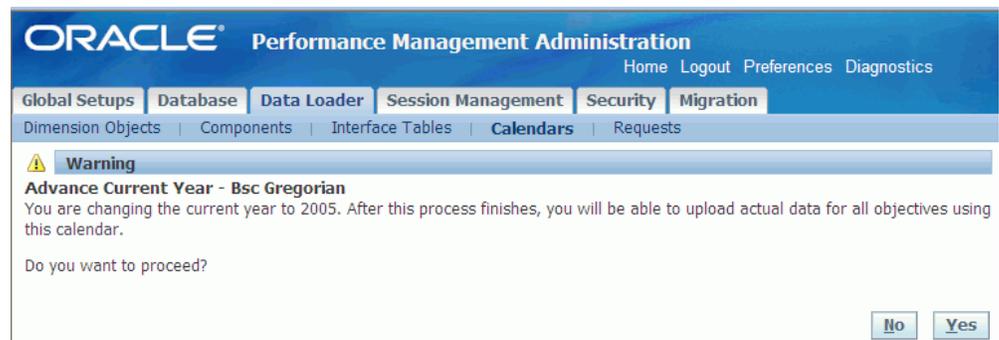
1. Navigate to Data Loader > Calendars. The Calendar window displays the list of available calendars and displays the following information for each calendar:
 - **Calendar:** Calendar name.
 - **Type:** Predefined calendars are preseeded with Balanced Scorecard. Custom calendars are defined by the designers.
 - **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.

2. 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.



3. 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.

Migration

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). You can either migrate data fully or incrementally.

When you migrate data fully, the data in the target system is *overwritten* by the data from the source system. All scorecards and related components along with the related data are migrated to the target system.

Alternatively, you can incrementally migrate metadata, that is definition of data, of objectives and related components from a target system to a source system. When you incrementally migrate data, you can choose the objectives and scorecards that you want to migrate.

Depending on the options you configure, you can append or overwrite selected data to the target system from the source system. Use Incremental Migration if you decide to merge and append new content to the existing system that is in production.

Important: In case of incremental migration, after you complete migrating metadata, you need to run GDB for the selected objectives and/or simulations.

There are three ways to migrate Balanced Scorecard systems either fully or incrementally:

Important: In case of incremental migration only the data definition,

that is, metadata is migrated.

- **All Scorecards, Objectives, and Reports in System:** Migrates the entire system.

Note: This option is available only if the migration mode is Full.

- **Selected Scorecards:** Migrates specific scorecards as well as the objectives and other data associated with those scorecards.
- **Selected Objectives, Reports, and/or Simulations:** Migrates specific objectives, simulations, and/or reports and the data associated with these objectives or reports.

Important: In case of incremental migration you cannot migrate reports.

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

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

Migrate Systems

To start the migration process, log in to 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.

In case of incremental migration, select and map the 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.
Note: Do not create a connection name starting with BSC_SYS. Connections using the prefix BSC_SYS are reserved for use by Balanced Scorecard.
 - **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.

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

Select	Name	Description	Source System	Update	Delete
<input type="radio"/>	BSC61ST	BSC61ST	BSC61ST		
<input type="radio"/>	BSC61ST2		BSC61ST2		
<input type="radio"/>	BZ5ST202	BZ5st202	BZ5ST202		

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.

Map Responsibilities allows you to migrate end user security from the source system to the target system. For example, Responsibility A on the source system has access to Scorecard One on the source system. Also, Responsibility A is mapped to Responsibility B on the target system. This means that Responsibility B on the target system will have access to Scorecard One.

The Responsibilities page displays the list of available responsibilities, Balanced Scorecard designer and administrator, on both the target and source system. If the responsibilities matches on both the target and source system, the responsibilities are automatically mapped. 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.

Source System Responsibility	Target System Responsibility	Remove
Performance Management User	Performance Management User	
Balanced Scorecard Manager	Balanced Scorecard Manager	
Performance Management Designer	Performance Management Designer	

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 Migration Mode, 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

Migration Mode

This option allows to select migration mode

- Incremental - Append new objects and replace existing objects in the target system
- Full - Remove and create ALL objects from the target system

Strategic Information

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

- All Scorecards, Objectives and Reports
- Selected Scorecards
- Selected Objectives/Reports

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

- **Migration Mode**

- **Incremental:** Migrate metadata of selected objects from an instance on the source system to another instance on the target system. The target instance can be an existing instance or a new instance. If the selected objects are not present in the target system, the objects are appended. If the selected objects are present in the target system, then the objects are mapped or overwritten.

Note: Incremental migration does not wipe out or overwrite the entire instance in the target system.

Important: After incremental migration, run GDB for selected objectives and/or simulations.

- **Full:** Migrate the entire Balanced Scored system from one instance on the source system to another instance on the target system

Important: In case of Full migration, both the metadata, that is, data definition, and data is migrated.

- **Strategic Information**

Depending on the migration mode that you select, select either one or more of the following strategic information options.

- **All Scorecards, Objectives, and Reports:** Migrate definition and data of all scorecards, objectives, and reports from the source system to the target system. You can select this option only if the migration mode is Full.
 - **Selected Scorecards:** Migrate only selected scorecards and all the underlying objectives and objects related to the selected scorecards.
 - **Selected Objectives, Simulations, and/or Reports:** Migrate only selected objectives, simulations, and/or reports and all the underlying objects related to the selected objectives, simulations, and/or reports.
- **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

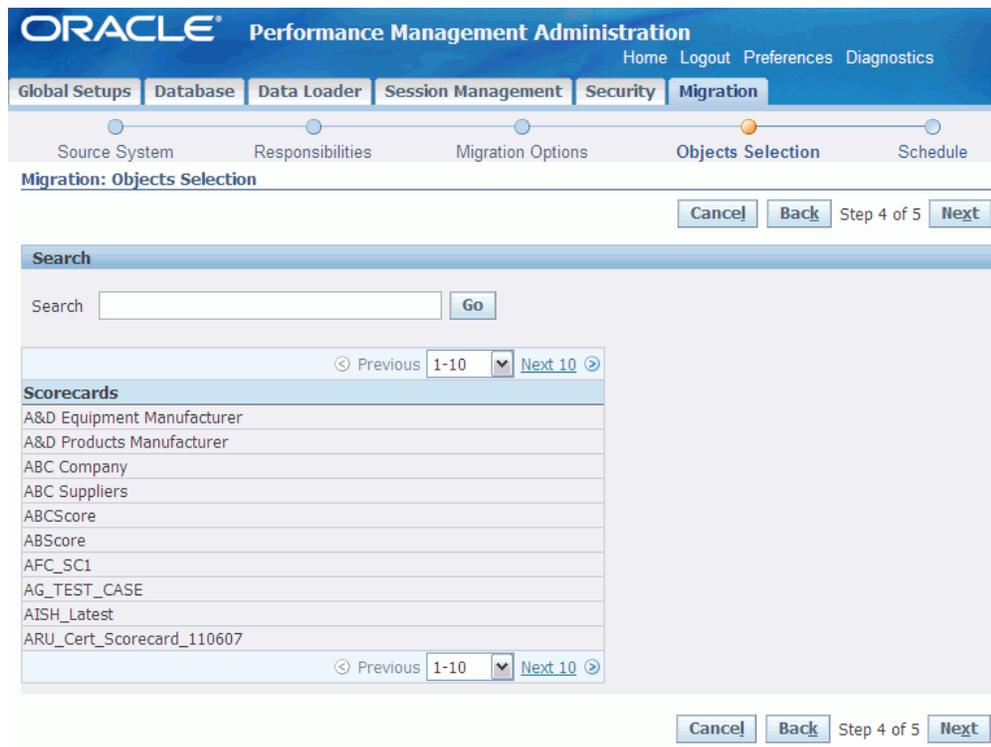
Depending on the migration mode and migration type that you select, you need to select the objects to be migrated as follows:

- **All Scorecards and Objectives in System:** Displays the entire list of scorecards available on the source system. You can select this option only if the migration mode is Full. All components and dimensions that are part of at least one scorecard will be migrated.
- **Selected Scorecards:** Displays an empty list. You need to add the scorecards that you want to migrate. All components and dimensions that are part of selected scorecards will be migrated.

If the migration type is Incremental, you can map the following entities of the

selected scorecard in the source system with those in the target system: objective group, measures, fields, dimension objects, dimensions, and calendar. Otherwise, you can create new entities in the target system. After completing the mapping process, click Apply to run Incremental Migration.

- In case of incremental migration, Balanced Scorecard does not allow you to create new objective groups.
- You cannot copy objectives containing preseeded KPIs.



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

If the migration type is Incremental, you can map the following entities of selected objectives in the source system with those in the target system: objective group, measures, fields, dimension objects, dimensions, and calendar. Otherwise, you can create new entities in the target system. After completing the mapping process, click Apply to run Incremental Migration.

ORACLE Performance Management Administration Home Logout Preferences

Global Setups Database Data Loader Session Management Security Migration

Objective Group Mapping Measure Mapping Fields Mapping Dimension Object Mapping Dimension Mapping Calendar-Period Mapping

Objective Group Mapping

Review and update the objective group mapping.
All objectives will be created as new objectives in the selected objective group. Cancel Step 1 of 6 Next

Name	Source Objective Group	Target Objective Group	Update
Price Gap	Maximize Sales Growth	Maximize Sales Growth	

Cancel Step 1 of 6 Next

- In case of incremental migration, Balanced Scorecard does not allow you to create new objective groups..
- You cannot copy objectives containing preseeded KPIs.

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: Objects Selection

Cancel Back Step 4 of 5 Next

Search

Search

	Remove
Improving Working Lives	
ImproveSales	
Improve Manufacturing Facilities	

Cancel Back Step 4 of 5 Next

Run or Schedule Migration

The screenshot shows the Oracle Performance Management Administration interface. The top navigation bar includes 'ORACLE Performance Management Administration' and links for 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this is a menu with 'Global Setups', 'Database', 'Data Loader', 'Session Management', 'Security', and 'Migration'. A progress bar below the menu shows five steps: 'Source System', 'Responsibilities', 'Migration Options', 'Objects Selection', and 'Schedule'. The 'Migration: Schedule' page is active, showing options to 'Process immediately' (selected) or 'Schedule'. The 'Schedule' option is selected, with a 'Start Date' of '27-Aug-2007' and a 'Start Time' of '01:59 AM'. Below this is a 'Notifications' section with an 'Add Recipients' button and a table with columns 'Recipient', 'Status', and 'Remove'. The table contains the text 'No recipient has been assigned.' At the bottom right, there are 'Cancel', 'Back', and 'Finish' buttons, with 'Step 5 of 5' displayed.

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.

Important: In case of Incremental Migration, you cannot run or schedule migration.

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 preseeded 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 (preseeded content) in both instances prior to the migration.

Index

Symbols

Performance Management Designer, 1-8

A

adding

 KPIs, 3-18

 objectives, 2-6

additional information

 enabling for List of Scorecards, 2-18

add simulation, 2-8

administration

 overview, 1-8

administrator

 role, 1-8

advancing

 calendars, 9-16

architect

 objective properties, 3-51

assign

 responsibility, 2-25

assigning

 responsibilities, 6-1

 scorecards, 6-1

assign weights, 3-18

attributes

 defining, 3-18

B

benchmarks, 3-51

C

calculations, 8-12

calendar

 advancing, 9-16

calendars

 creating, 3-48

cause and effect, 3-51

color methods, 3-18

common dimensions, 2-2

components, 9-13

 deleting, 9-16

configuring

 scorecard view, 2-18

 strategy view, 2-20

create

 data source, 3-10

 kpi, 3-4

 loss, 3-46

 measures, 3-4

 multi series, 3-18

 profit, 3-46

 scorecard, 2-4

creating

 calendars, 3-48

 custom views, 2-11

 dashboards, 3-64

 dimensions, 3-11

 launchpads, 2-16

 objectives, 3-2, 3-18

 periods, 3-48

 reports, 3-64

 scorecard hierarchies, 2-4

 scorecards, 2-2

Custom View portlet, 5-1

custom views
 creating, 2-11

D

dashboards
 creating, 3-64

data
 source, 3-10

database
 generating, 8-1
 generating objects, 8-4
 troubleshooting, 8-15
 viewing documentation, 8-10
 viewing status, 8-3

data loader, 9-1

data source
 create, 3-10

define
 analysis option, 3-18
 common dimensions, 2-23
 filters, 2-21

defining
 attributes, 3-18

deleting
 components, 9-16
 objectives, 9-16
 reports, 9-16
 simulation, 9-16

designer
 role, 1-7

designers
 assigning roles, 6-1

designing
 scorecards, 1-7

dimension object relationships, 3-11

dimension objects, 3-11
 loading, 9-2

dimensions
 creating, 3-11
 define, 2-23

directional lines
 formatting, 2-19

duplicate
 objectives, 3-18

E

enable
 trends, 3-18

enabling
 additional information, 2-18
 views, 2-9

F

filter
 scorecard, 2-2

filters
 define, 2-21

formatting
 directional lines, 2-19

G

generating
 database objects, 8-1, 8-4

global parameters
 setting up, 7-1

goal type, 3-4

groups
 data source, 3-10

I

incremental migration, 11-1

indicator
 profit and loss, 3-46

interface tables
 loading, 9-8

K

kpi
 create, 3-4

KPIs
 adding to objectives, 3-18

L

launchpads
 creating, 2-16
 securing, 2-16

List of Objectives portlet, 5-1

List of Scorecards
 additional information, 2-18

load
 components, 9-13

- loading
 - data, 9-1
 - dimension objects, 9-2
 - interface tables, 9-8
 - objectives, 9-13
 - reports, 9-13
 - simulations, 9-13
- logo, 2-4
- loss
 - objectives, 3-46
- loss indicator
 - create, 3-46

M

- managing
 - user sessions, 10-1
- master and share
 - objectives, 3-51
- measure
 - create, 3-4
- migrate
 - full, 11-1
 - incremental, 11-1
- migrating
 - scorecard systems, 11-2
- migration, 11-1
- monitoring
 - requests, 8-12
- move
 - objectives, 3-18

O

- Objective Graph portlet, 5-1
- objectives
 - adding, 2-6
 - creating, 3-2, 3-18
 - defining properties, 3-51
 - deleting, 9-16
 - duplicate, 3-18
 - loading, 9-13
 - master and shared, 3-51
 - move, 3-18
 - profit and loss, 3-46
- overview
 - administration, 1-8
 - designing scorecards, 1-7

P

- Performance Management Designer, 1-7
- periods
 - creating, 3-48
- portlets
 - Balanced Scorecard, 5-1
- profit
 - objectives, 3-46
- profit indicator
 - create, 3-46

R

- reports
 - creating, 3-64
 - deleting, 9-16
 - loading, 9-13
- requests
 - monitoring, 8-12
- responsibilities
 - assigning, 6-1
- responsibility
 - Performance Management Designer, 1-7
 - Performance Management Designer, 1-8
 - scorecard, 2-25
- roles
 - assigning, 6-1
- Roll up Methodology, 8-12

S

- scorecard
 - add simulation, 2-8
 - create, 2-4
 - custom views, 2-11
 - filters, 2-2
 - responsibility, 2-25
 - views, 2-9
- scorecard hierarchies, 2-4
- scorecard logo, 2-4
- scorecards
 - creating, 2-2
 - designing, 1-7
- scorecard systems
 - migrating, 11-2
- scorecard theory, 1-1

- scorecard view
 - configuring, 2-18
- securing
 - Balanced Scorecard portlets, 5-1
 - launchpads, 2-16
- set
 - goal type, 3-4
- setting up
 - global parameters, 7-1
- simulation
 - add, 2-8
 - deleting, 9-16
- Simulation, 4-1
 - create, 4-1
- simulations
 - loading, 9-13
- status
 - viewing database, 8-3
- strategy view
 - configuring, 2-20

T

- troubleshooting
 - database, 8-15

U

- user buttons, 3-51
- users
 - managing multiple, 10-1
- users
 - assigning scorecards, 6-1

V

- view
 - configuring, 2-18, 2-20
- viewing
 - database documentation, 8-10
 - database status, 8-3
- views
 - custom, 2-11
 - enabling, 2-9

W

- weighted average, 3-18