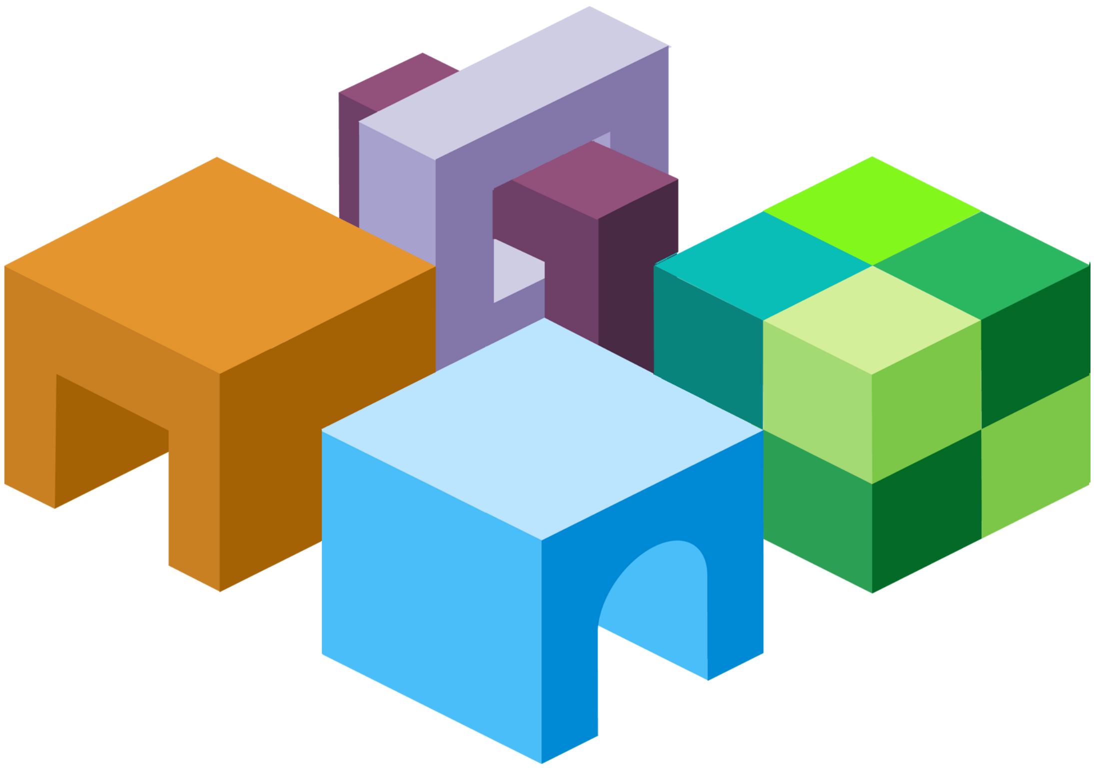

ORACLE® HYPERION PERFORMANCE SCORECARD, FUSION EDITION

RELEASE 11.1.2

ADMINISTRATOR'S GUIDE

ORACLE®
ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM

Contents

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1 About Administration

In This Chapter

Administrative Tasks

Manage and monitor Performance Scorecard applications by performing tasks such as the following:

- Create custom security roles, that you apply to accounts in Shared Services, that determine the measures, scorecards, initiatives, and Web pages that users can access.
- Synchronize existing account security with Oracle's Hyperion® Shared Services.
- Ensure application security by removing scripting features.
- Create connection to external data sources that can be used in application-building.
- Monitor changes made to business objects.
- Unlock locked business objects.
- Generate multidimensional Oracle Essbase databases of application data.
- Promote data from one environment, such as development or testing, to another environment, such as production.
- Migrate entire applications from one environment to another using the Life Cycle Management Utility.
- Back up or restore notes that contain attachments.

Requirements

To administer Performance Scorecard, you must have the administrator security role (provided in Performance Scorecard) and the Power Manager role (provided in Shared Services) assigned to your account.

You must have the Provisioning Manager role (provided in Shared Services) to perform these tasks:

- Migrate existing Performance Scorecard accounts not provisioned in Shared Services.

  Note: To retain existing user passwords, migrate accounts using the previous release of Performance Scorecard before upgrading to this release.

- Perform a bulk synchronization between users and groups provisioned withOracle Hyperion Performance Scorecard, Fusion Edition roles in Shared Services against those provisioned in Performance Scorecard.

Accessing and Navigating Performance Scorecard

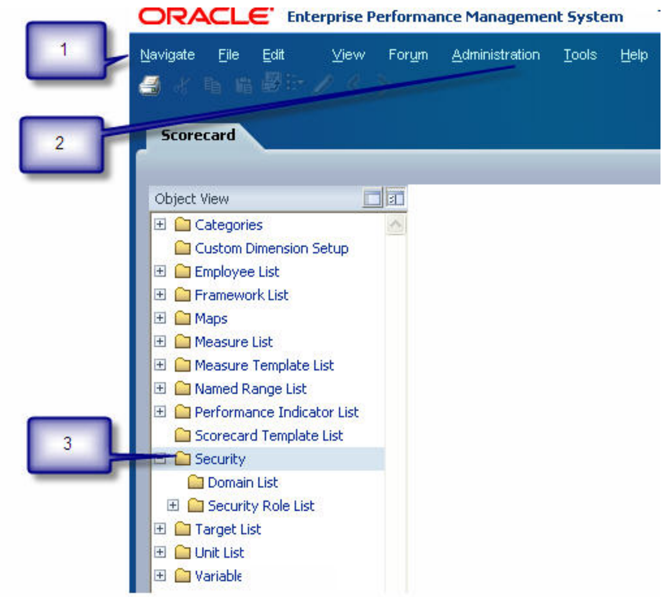
➤ To access Performance Scorecard:

1. **Log on to Oracle Enterprise Performance Management Workspace, Fusion Edition by specifying admin and password, or using an account created in Shared Services that has the admin (Power Manager) role.**
2. **Perform a task:**
   - Select **File**, then **Open**, then **Applications**, and then **Performance Scorecard**

As shown below, Performance Scorecard opens and contains these panes and tools:

- Navigate menu, to the top left that enables you to access different product applications and pages. See the *Oracle Hyperion® Enterprise Performance Management Workspace User Guide*.
- Administration menu that enables you to perform tasks such as promote data, configure external data sources, migrate accounts to Shared Services, generate Essbase databases, and monitor user activity.
- View pane—To the left that displays the Object and Browser views. Links to the domains and security roles that you create or access are in the Security explorer on the Object view.

Figure 1   Performance Scorecard in Workspace



Performance Scorecard Menu Commands

Favorites

You can use these commands:

- Add current page—Bookmark a page as one of your favorites.
- Edit favorites—Change the order in which your favorites are displayed or their title.

Administration

You can use these commands:

- Locked Business Objects Report—Identify and unlock locked business objects currently in use or otherwise unavailable. See "Using the Locked Business Objects Report" on page 77.
- Audit Report—Track changes made to business objects. See "Using the Audit Report" on page 78.
- User Session Report—Identify the users currently using Performance Scorecard.
- Attachment Backup—Back up and restore attachment files.
- Promotion—Copy application data from one environment, such as development or testing, to another, such as production. See "Migrating Data" on page 55.
- Star Schema Generation—Create Star Schema tables or a multidimensional Essbase database of application data. See "Generating Star Schemas and Essbase Databases" on page 33.

- Data Source List—Add, edit or remove an external data source for creating links to external data. See "Defining External Data Sources" on page 48.
- User Provisioning Migration—Perform a one - time migration of existing Performance Scorecard accounts to Shared Services.
- Synchronize Security With Shared Services— Perform bulk synchronization between users and group accounts provisioned in Shared Services with those created in Performance Scorecard.
- Synchronize User Accounts With Employees—Identify the accounts that need to be created in Shared Services to support Performance Scorecard employees. If you have the designer security role, create Employees for user accounts with which none are associated:
- Alerter—Monitor alert activity.

Help

To access page-specific, context-sensitive help, select **Help**, and then **Help On This Topic**. For example, for information about creating domains on the Domain Setup page, select **Help**, and then **Help On This Topic**.

To access help for all product applications open in Oracle Hyperion Enterprise Performance Management System, select specific **Help**, and then **Contents**.

Menu Commands

This topic describes the Performance Scorecard-specific options for these menus:

- "Favorites" on page 14
- "Administration" on page 14
- "Help" on page 15

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Administration

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Toolbar

For information about the toolbar buttons, see the *Oracle Hyperion® Enterprise Performance Management Workspace User Guide*.

2 Working With Accounts

In This Chapter

Overview

You create and provision user and group accounts in Shared Services. Any domains or custom security roles that you create to specify the Performance Scorecard data that users can access are automatically available in Shared Services.

Perform these tasks based on your setup and previous use of Shared Services:

- If you upgraded to this release and did not previously provision accounts in Oracle's Hyperion® Foundation Servicesperform a one-time migration. See "Migrating Existing Accounts" on page 29.

  Note: To retain existing account passwords, migrate accounts using the previous release of Performance Scorecard, before upgrading to this release.

- Perform a bulk synchronization between users and groups provisioned with Performance Scorecard roles in Shared Services against accounts provisioned in Performance Scorecard. See "Bulk Synchronizing Accounts" on page 29.
- List the users that you must create and provision in Shared Services to accommodate new employees created in Performance Scorecard. See "Identifying Required Shared Services Accounts" on page 29.

Domains

Create domains to represent distinct functional or regional areas in an organization such as regional offices or departments. Domains can have No Parent (if they are the first hierarchy level) or one parent (if they are a lower hierarchy level). Application designers can associate business objects such as maps, measures, employees, initiatives and scorecards, with domains. For example, in the following hierarchy the parent of North America and Europe is Global; and the parent of Sales Canada:

Level 1 Global

Level 2: North America

Level 3: Canada

Level 4: Human Resources Canada

Level 4: Sales Canada

Level 3: Mexico

Level 4: Human Resources Mexico

Level 4: Sales Mexico

Level 3: USA

Level 4: Human Resources USA

Level 4: Sales USA

Level 2: Europe

Level 3: France

Because domains can contain sensitive information, specify the level of information that users can access in each domain. Grant *implicit access* to provide full access to data in lower-level domains that you select, and read-only access to higher level domains that you select. Grant *explicit access* to enable access only to specific domains. Using the sample hierarchy above, the following applies:

- Users granted access to North America with implicit access get full access and access Global, North America, Europe, Canada, Mexico, USA, France, Germany, and all Human Resources and Sales domains.
- Users granted access to Europe, without the implicit option, also have full access to the France, and Germany, and read access to data in the Global domain.
- Users granted explicit access to Europe, without the implicit option, can only access Europe.

Security Roles

By default, access is restricted to all measures and scorecards in an application. Assign access by specifying permission settings in the security role applied to user accounts. Although you can create your own, these default security roles are provided:

- user—Enables end users to access reports, maps, notes, use alerts, and enter data. This corresponds to the basic role in Shared Services.
- designer—Enables application designing users to perform the aforementioned tasks, and create business objects such as measures and scorecards. This corresponds to the interactive role in Shared Services.
- generic domain designer—Enables users to perform designer tasks and place business objects such as maps and measures in domains. This role corresponds to the interactive role in Shared Services.
- admin)– Enables users to monitor applications and application data as described in this guide. This corresponds to the Power Manager role in Shared Services.

Access Permissions

Access permissions are assigned to a security role to determine access to scorecards, initiatives, and measures. Restrictions and permissions are cumulative, meaning the total of all restrictions and permissions are used. After the results for all permissions are evaluated, an authorization and priority level is generated. A high overwrites a low level. For example, if a security role has Grant All and Deny All access, the user can see all scorecards because Grant All has a higher priority level than Deny All.

Because you can apply multiple, sometimes conflicting, permissions and restrictions to a security role, authorization rules apply, based on the permission result. See:

- "Priority Rules" on page 21
- Table 1, "Scorecard Access Permissions," on page 19
- Table 2, "Measure Access Permissions," on page 20

Table 1 Scorecard Access Permissions

Permission	Result if condition satisfied	Result if condition not satisfied
No permission	6 – Deny All	–
Grant access to all scorecards	5 – Grant All	–
Grant access to all Strategy elements scorecards only	3 – Grant Group	4 – Deny Group
Grant access to all scorecards in Domain	3 – Grant Group	6 – Deny All
Grant access to this scorecard	1 – Grant Single	6 – Deny All
Deny access to this scorecard	• 2 – Deny Single (Itself) • 4 – Deny Group (Parent)	6 – Deny All
Deny access to all scorecards in Domains	4 – Deny Group	6 – Deny All
Deny access to all scorecards	2 – Deny Single (if no associated employee, else see below:	4 – Deny Group

Permission	Result if condition satisfied	Result if condition not satisfied
Unless the scorecard is the user's primary scorecard	3 — Grant Group	–
Unless the scorecard is an Accountability element scorecard owned by the user	3 — Grant Group	–
Unless the scorecard is a child of an Accountability element scorecard to which the user has access	3 — Grant Group	–
Unless the scorecard is a parent of an Accountability element scorecard to which the user has access	3 — Grant Group	–
Unless the scorecard is an Accountability element scorecard and the user is a member of that element	3 — Grant Group	–
Unless the scorecard is a Strategy element scorecard to which the user belongs	3 — Grant Group	–
Unless the scorecard is a child of a Strategy element scorecard to which the user has access	3 — Grant Group	–
Unless the scorecard is a parent of a Strategy element scorecard to which the user has access	3 — Grant Group	–
Unless the scorecard is an employee scorecard for which the user is the manager	3 — Grant Group	–

Table 2 Measure Access Permissions

Permission	Result if condition satisfied	Result if condition not satisfied
No permission	6 — Deny All	–
Implicit: Grant access if user is result collector of the measure	1 — Grant Single	—
Implicit: Grant access if user is target setter of the measure	1 — Grant Single	–
Grant access to all Measures	5 — Grant All	–
Grant access to all Measures in Domain	3 — Grant Group	6 — Deny All
Grant access to this measure	5 — Grant All	6 — Deny All
Deny access to this measure	1 — Grant Single	6 — Deny All
Deny access to all measures in Domain	3 — Deny Group	6 — Deny All
Deny access to all measures	2 — Deny Single — if no associated employee, else see below:	4 — Deny Group
Unless measure owner	3 — Grant Group	–
Unless measure is from an accessible scorecard	3 — Grant Group	–

Access Consolidation Rules

When evaluating authorization, sets of consolidation rules are used to determine access based on these factors:

- The security role assigned. See "Security Roles" on page 18.
- The permissions and restrictions defined. See "Access Permissions" on page 19.
- Authorization priority rules. See "Priority Rules" on page 21.

Access is granted only if the consolidated rule is one of these values:

- Grant All
- Grant Group
- Grant Single

For example, if two conditional access permissions are assigned to a user and both conditions satisfied during authorization evaluation, access is granted as follows:

Table 3 Consolidation Rule Example

Permission 1	Permission 2	Consolidated Result	Access Granted
Grant All (5) V, E, D, C1, C2	Deny All (6) D, C1	V(5), E(5), D(5), C1(5), C2(5)	V, E, D, C1, C2
Grant All (5) V, E, D, C1, C2	Deny Single (2) D, C1	V(5), E(5), D(2), C1(2), C2(5)	V, E, C2
Grant All (5) V, E, D	Deny All (6) D, C1	V(5), E(5), D(5), C1(6), C2(0)	V, E, D
Grant All (5) V, E, D	Deny Single (2) D, C1	V(5), E(5), D(2), C1(2), C2(0)	V, E

Priority Rules

Restrictions and permissions are cumulative, meaning the total of all restrictions and permissions are used. If permissions and restrictions conflict, these access priority rules, listed by priority, determine access:

- Grant one—1 (highest priority level)
- Deny one—2
- Grant group—3
- Deny group—4
- Grant all—5
- Deny all—6 (lowest priority level)

Managing Domains

Use domains to represent distinct functional or regional areas in an organization such as regional offices or departments. Because domains can represent organization hierarchies, you can specify the level of information that users can access in each domain. See:

- "Creating Domains" on page 22
- "Modifying Domains" on page 23
- "Deleting Domains" on page 23

Creating Domains

Create domains that represent geographically or functionally specific areas in your organization, such as departments. Before creating domains, identify the objects such as employees and measures that will be placed in the domains.

Note: The domains that you create in Performance Scorecard are automatically available in Shared Services for use in provisioning. This enables you to associate accounts with domains using the Manage Properties page.

➤ To create domains:

1. Select **Security**, and then **Domain List.**

   The Domain List is displayed.

2. Click **Add.**
3. Under **Name**, enter a unique name that identifies the domain, such as a region, office, project or department.

   For example, if your organization has multiple development offices in Europe, you could create a domain for each national head office, such as Development:Germany or Development:France.

4. Under **Description**, summarize the domain.
5. Perform a task:
   - If the domain is below another in the hierarchy, select the higher-level domain from **Parent Domain**.

     For example, if the domain represents the French development office, select Europe.

   - If the domain is the highest level select **No Parent**.

     Users associated with the domain can access the data in any lower-level domains that are created.

6. Click **Save.**

You can use the domain to grant access to data by applying it to user or group accounts. See the *Oracle Hyperion Enterprise Performance Management System User and Security Role Guide*.

Modifying Domains

Edit domains to reflect changes in domain settings or hierarchies. For example if departments in your organization are represented by domains, and one no longer reports to another, modify the domains.

➤ To modify domains:

1. On the Object View, select **Security**, then **Domain List**, and then *domain*.
2. Right—click the domain and select **Edit.**

   The Domain Setup is displayed.
3. Change the domain settings. See "Creating Domains" on page 22.

Deleting Domains

Before deleting a domain, ensure that application designers can access the data that it contains.

➤ To delete domains:

1. On the Object View, select **Security**, then **Domain List**, and then *domain*.
2. Right-click the domain and select **Delete** from the shortcut menu.

   Confirm that you want to delete the domain.

Managing Security Roles

These sections explain how to create, edit, and remove security roles that determine access to Performance Scorecard data. The security roles that you create are automatically available in Oracle's Hyperion® Shared Services Console for use in user and group account provisioning.

See

- "Creating Security Roles" on page 23
- "Modifying Security Roles" on page 28
- "Deleting Security Roles" on page 29

Creating Security Roles

You can define custom security roles to provide general or conditional access to scorecards, measures, reports, and tasks. Although you can assign multiple security roles to an account, the permissions associated with the most restrictive role are applied. For Web page restrictions, the least restrictive role is applied.

Note: The security roles that you create are automatically available in Shared Services for use in user and group account provisioning.

➤ To create security roles:

1. Select **Security**, and then **Security Role List.**

   The Security Role List is displayed.

2. Click **Add.**

   The Security Role Setup page is displayed.

3. In **Security Role Name**, enter a unique name.
4. Under **Description**, provide a brief explanation of how the security role is used.
5. Select the scorecards, measures, initiatives, and reports to which the security role provides, or denies access. See:
   - "Assigning Scorecard Permissions" on page 24
   - "Assigning Measure Permissions" on page 25
   - "Assigning Initiative Permissions" on page 26
6. Click **Save.**

Assigning Scorecard Permissions

This section explains how to assign scorecard permissions for a security role.

➤ To assign scorecard permissions:

1. On the Security Role Setup page, right-click **Scorecard Permission** and click **Add.**

   The Scorecard Permissions page is displayed.

2. In **Permission Name**, enter a name for the set of scorecard permissions you are applying to the selected security role.
3. To grant or deny access to scorecards or scorecards in particular domains, assign permissions as follows:
   - Grant access to all scorecards — Select to provide access to all scorecards.
   - Grant access to all scorecards in Domains — Select to provide access to scorecards in a domain that you choose. To grant access to scorecards created in levels below and above the specified domain, select **Domain**, then **Implicit Access.** To grant access to scorecards in the domain of the employee with which the user is associated, select **Include Employee Domain.**
   - Grant access to this scorecard — Select to grant access to a single scorecard that you choose.

- Deny access to this scorecard — Select to prevent access to a scorecard that you choose.

4 To deny access to scorecards unless the user meets certain criteria, select **Deny access to all scorecards** and assign conditional permissions:

- **Unless the scorecard is the user's primary scorecard** — Grants access only to scorecards created for the user by a manager
- **Unless the scorecard is an Accountability element scorecard owned by the user—** Grants access only to scorecards evaluating the performance of accountability elements that the user owns.
- **Unless the scorecard is a child of an Accountability element scorecard to which the user has access—**Grants access only to descendants of an Accountability scorecard
- **Unless the scorecard is a parent of an Accountability element scorecard to which the user has access —**Grants access only to parent scorecards of an Accountability scorecard
- **Unless the scorecard is an Accountability element scorecard and the user is a member of that element—**Grants access only to scorecards assessing the performance of accountability elements to which the user is assigned
- **Unless the scorecard is a Strategy element scorecard to which the user belongs—**Grants access only to scorecards evaluating the performance of strategy elements with which the user is associated.
- **Unless the scorecard is a child of a Strategy element scorecard to which the user has access—**Grants access only to child scorecards of a Strategy scorecard
- **Unless the scorecard is a parent of an Strategy element scorecard to which the user has access—**Grants access only to higher-level parent scorecards of Strategy scorecards
- **Unless the scorecard is an employee scorecard for which the user is the manager—** Grants access only to scorecards that evaluate employees managed by the user.

5 **Optional:** If you are creating a role for an application designer, specify the tasks that they can perform as follows:

- To enable users to only access data, select **View**.
- To enable users to modify data, select **Edit**.
- To enable users to delete data, **Delete**.
- To enable users to create secondary scorecards for another scorecard, select **Create Secondary Scorecard**.
- To enable users to attach initiatives to scorecards, select **Create Dependant Strategic Initiative**.

6 Click **Save**.

Assigning Measure Permissions

This section explains how to grant complete or conditional access to measures using the security role.

Note: Users who are Result Collectors or Target Setters can enter results or targets, regardless of permissions.

➤ To assign measure permissions to security roles:

1 On the Security Role Setup page, right-click **Measure Permission** and select **Add.**

The Measure Permission Setup page is displayed.

2 In **Permission Name**, enter a name for the set of measure permissions.

3 To grant or deny access to individual measures or measures in a domain, assign permissions as follows:

- To grant access to all measures in a domain that you choose, select **Grant access to all measures in Domains.**
- To grant access to measures in the domain of the employee which the user is associated, select **Include Employee Domain**.
- To grant access to measures in levels above and below a specified domain, select **Domain Implicit Access.**
- To grant access to only a specific measure, select **Grant access to this measure.**
- To grant access to all measures expect one measure that you choose, select **Deny access to this measure.**
- To deny access to measures in a particular domain that you choose, select **Deny access to measures in domains.**

4 To deny access to measures unless users meets certain criteria, select **Deny access to all measures** and assign a conditional permission as follows:

- **Unless measure owner**—Grant access only to measures that are owned by the user.
- **Unless measure from accessible scorecard**—Grant access to measures on scorecards to which they user can access

5 Click **Save.**

Assigning Initiative Permissions

Users can only view initiatives only if they can access the object to which the initiative is attached.

➤ To assign initiative permissions to security roles:

1 On the Security Role Setup page, right–click **Initiative Permission** and select **Add.**

The Initiative Setup page is displayed.

2 Enter a name for the set of initiative permissions in **Permission Name.**

3 Perform a task:

- To grant or deny access to all or individual initiatives, select an option:
    - **Grant access to all initiatives**—Provide access to all initiatives.

- **Grant access to all initiatives in Domain** —Provide access only to initiatives in a domain that you choose.
- **Deny access to all initiatives in Domain**—Prevent access to initiatives in a domain that you choose.

- To deny access unless users meet certain criteria, select **Deny access to all initiatives unless** and select the conditions:
- Initiative is attached to Accountability elements user can access—Grants access only to initiatives for the accountability elements that the user can access.
- Initiative is attached to Strategy elements a user can access—Grants access only to initiatives for the strategy elements that the user can access.
- Initiative is attached to measures the user can access—Grants access only to initiatives for the measures that the user can access.
- User has access to parent of the initiative—Grants access only to initiatives attached to a higher-level initiative that the user can access.
- User has access to at least one child of the initiative—Denies access unless the user can access the appropriate secondary initiatives.
- User is owner of Initiative accountability element—Grants access only to initiatives for the accountability elements that the user owns.
- User is member of initiative accountability element—Grants access only to initiatives for accountability elements to which the user is assigned.
- User is owner of initiative measure—Grants access only to initiatives for the measures that the user owns.
- User is annotation creator of initiative measure—Grants access only to initiatives for the measures for which the user is an annotation creator.
- User is result collector of initiative measure—Grants access only to initiatives for the measures for which the user can enter results.
- User is target setter of initiative measure—Grants access only to initiatives for the measures for which the user can define targets.

4 **Optional:** If you are creating a role an application designer, specify the tasks that they can perform.

Restricting Pages and Reports

This section describes how to prevent users from accessing individual or groups of reports and pages. Many reports and pages are restricted by default. See "Granting Access to Restricted Pages and Reports " on page 28.

➤ To restrict reports and pages:

1. On the Security Role Setup page, right–click **Web Page Restrictions**, and select **Add.**
2. Select the individual, or groups of pages to restrict. SeeAppendix E, "Web Page Restrictions" .
3. Click **Save.**

Granting Access to Restricted Pages and Reports

These groups of pages are restricted by default:

- Admin Group—Prevents users from performing the administrative tasks described in this guide.
- Designer Group—Disables the Object View on which users can create objects such as employees, maps, and measures.
- Result Collection Admin—Prevents users who are Result Collectors from entering results and target values for locked measures.
- Object View on View Pane—Prevents users from creating business objects.
- Results and Targets tab—Prevents users from viewing, entering, modifying, and deleting results and targets on this combined tab of the Measure Details Report.

➤ To enable access to these pages:

1. On the Scorecard Setup page, select **Webpage Restrictions.**
2. Select the Web page group.
3. Right-click and select **Delete.**

Modifying Security Roles

Edit security roles to increase or restrict access for a user to scorecards, measures and Web pages. Your changes are automatically reflected in Shared Services.

➤ To modify security roles:

1. Select **Security**, then **Security Role List**, and then *role*.
2. Right–click the role and select **Edit.**
3. Modify the security role. See:
   - "Assigning Scorecard Permissions" on page 24
   - "Assigning Measure Permissions" on page 25
   - "Assigning Initiative Permissions" on page 26

Copying Security Roles

Copy security roles to assign similar permissions and restrictions to another account. The duplicate security role is automatically available in Shared Services for provisioning.

➤ To copy security roles:

1. On the Object View, select **Security**, then **Security Role List.**
2. On the list, select the role and click **Copy.**

The security role is added to the list with `Copy of` before the name.

3 **Change the security role as required. See** **"Modifying Security Roles" on page 28****.**

Deleting Security Roles

Before deleting roles, ensure that they are not assigned to active user accounts. .

➤ To delete roles, select **Security**, then **Security Roles**, then right-click the role, and then select **Delete**.

Bulk Synchronizing Accounts

Perform a bulk synchronization between users and groups provisioned with Performance Scorecard roles in Shared Services against accounts provisioned in Performance Scorecard.

To synchronize accounts, select **Administration**, and then **Synchronize Security With Shared Services**.

Identifying Required Shared Services Accounts

To generate a list of users that need to be created and provisioned in Shared Services to accommodate existing Performance Scorecard employees, select **Administration**, then **Synchronize User Accounts With Employees**. Create and provision these accounts in Shared Services as described in the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.

Tip: If your account has the administrator and designer security roles, you can choose to automatically generate employees for, and assign them to these accounts .

Migrating Existing Accounts

Perform a one-time bulk migration to transfer accounts to that were not previously provisioned in Shared Services to the current release of Shared Services.

Note: To retain existing passwords, migrate accounts using the previous release of Performance Scorecard, before upgrading to this release.

Before migration, ensure the following:

- Your account has the Provisioning Manager (provided in Shared Services) role.
- The E-mail addresses for all employees is in:*user@provider*.com format.
- For external direcotiries: The accounts you will migrate exist on the authentication server.

- NTLM: The Full Name field in the user account setup screen on the NTLM server are in this format:

  `'`*Firstname* space *Lastname*`'` (for example, `John Smith`)

➤ To migrate accounts:

1 **Start the Shared Servicesserver.**

2 **In the Performance Scorecard, select Administration, and then User Provisioning Migration.**

The Shared Services Administrator For Migration page is displayed.

3 **Enter the User ID and Password for the Administrator. The migration administrator must exist in Shared Services.**

4 **Click Perform Pre-Migration Check to create the required database tables.**

5 **When prompted, click Next.**

The Externalize Users page is displayed, identifying all user accounts, account details, and service providers.

6 **Perform these steps for the accounts to not migrate:**

a. Click **Edit**.

The Migration dialog box is displayed.

b. From **Migration Action**, select **Do Not Migrate** for each user, and then click **Save**.

c. Repeat steps a and b to exclude users from migration.

7 **Optional: Select Externalize Groups to migrate group accounts.**

8 **When prompted, click Next to display the Migration to Shared Services page.**

9 **Click Test migration.**

A confirmation is displayed when the test migration finishes.

10 **Click OK.**

If a problem is indicated in the migration status messages, correct any errors and try again.

11 **Click Migrate.**

A message is displayed to advise the migration has been successfully completed.

12 **In Shared Services, select Administration, and then Provision Report to confirm users have been migrated correctly.**

All migrated users are displayed, and have the inherited Scorecard attributes for their security roles.

About Advanced Security, Authorization, and Authentication

See the *Oracle EPM System Security Administration Guide* to perform these tasks:

- Enable SSL and single sign-on
- Configure webservers
- Use custom authentication modules

See the *Oracle EPM System User and Role Security Guide* to perform these tasks:

- Configure user directories
- Manage Native Directory
- Manage provisioning

3 Generating Star Schemas and Essbase Databases

In This Chapter

About Using Star Schemas and Essbase Databases

Generate Essbase databases using Essbase of application data. This enables you to leverage your data for use in other Hyperion products, such as Oracle's Hyperion® Interactive Reporting.

You can generate data as follows:

- By creating a Star Schema database that provides tables which contain a standard set of data from Performance Scorecard and is stored in relational database tables. You must generate Star Schema tables to generate reports in Interactive Reporting. See"Generating Star Schema Tables" on page 37.
- By creating Essbase databases that contain all requested Performance Scorecard data and is stored in Essbase multidimensional database tables. See "Generating Essbase Databases" on page 39.

Star Schema Tables

Star Schema tables are a number of predefined tables that can be used to transfer data from Performance Scorecard. You must generate these tables before you can create reports in Essbase or other Hyperion applications. The Star Schema tables are created and populated at the time the star schema is generated.

These predefined Star Schema tables are available:

- "HPS_STAR_FACT" on page 34
- "HPS_STAR_STATUS_SYMBOL" on page 35

Use the columns in the Star Schema tables as the basis for your customized reports, adding more columns as required.

HPS_STAR_FACT

The `HPS_STAR_FACT` table is created in Performance Scorecard to facilitate the export of all data for measures and dimensional measures into Essbase. You can use this table to export large amounts of data, then create reports using the information. Values are calculated and stored in the fact table.

This table is created with a separate row for each instance of a scorecard measure on a scorecard. A daily row is dedicated to a measure's result, targets and scores, and a null `scorecard_id`. A daily row is also created for scorecards, showing the score for each target and a null `measure_id`.

Table 4 HPS STAR_FACT Table Columns

Column	Index	Description
`MEASURE_ID`	X	ID of each measure. For dimensional measures, this column contains the Template_ID. If you selected **Create with Weights Included** this column contains the associated perspective.
`INTERSECTION_ID`	X	ID of measures and dimensional measures. If the measure equals the dimensional measure, the intersection ID is the same as the MEASURE_ID.
`SCORECARD_ID`	X	ID of each scorecard.
`COLLECTED_ RESULT`		Measure result. If results are missing, NULL is displayed.
`RESULT`		Value for a measure used in calculations for a day.
`VALUE_DATE`	X	Date for which the values are calculated and stored in the fact table.
`PTD`		Result of the period-to-date calculation. For example, this value could be the sum of results collected for a measure over a specific period of time, such as a year.
`WEIGHT`		Perspective measure weighting to be used to generate the Star Schema
`target`		Value of the target on VALUE_DATE.
`target``_SCORE`		Value of score as calculated using target on VALUE_DATE.
`target_`*`sub target`*		Value of any sub target that you create for a multi-value target

Column	Index	Description
target_*sub target*_SCORE		Score of any sub target that you create for a multi-value target
STRATEGY_ID		ID of each strategy element
ACCOUNTABILITY_ID		ID of each accountability element
*status*_STATUS		Default or custom status
*custom dimension*_ID		ID of any custom dimensions that you created
PTD_RESULTS_SCORE		Score calculated by a period-to-date function or manually entered.
PTD_RESULTS		Result calculated by a period-to-date function or manually entered.

HPS_STAR_STATUS_SYMBOL

Use the HPS_STAR_STATUS_SYMBOL table to customize reports that display your performance indicators.

Table 5 HPS_STAR_STATUS_SYMBOL Table Columns

Column	Description
STATUS_ID	Unique ID of the status symbol (performance indicator) for the measure.
STATUS_NAME	Name of the status symbol (performance indicator) for the selected measure.
STATUS_DESCRIPTION	Description, such as good performance, of a measure's status symbol.
SYMBOL_URL	URL of the image used for the status symbol.

HPS_STAR_DIM_TIME

This table contains the column, VALUE_DATE, with one row for each day on which reporting is permitted. Values are calculated and placed in the fact table.

HPS_STAR_MEASURES

The HPS_STAR_MEASURES table enables you to drill down into non-dimensional and composite measures and measure templates. This is a parent-child table. Parent-child relationship are not displayed for dimensional measures.

Table 6 HPS_STAR_MEASURES Table Columns

Column	Description
MEASURE_ID	Unique, system-generated key for the measure in CHILD_NAME. The MEASURE_ID is referenced in HPS_STAR_FACT .

Column	Description
CHILD_NAME	Name of every non-dimensional child measure.
PARENT_NAME	Depending on the type of generation selected for the database, this information is in PARENT_NAME: ● If you selected **Create with Weights Included** to generate the database, this column displays the Perspective ID, if available. Otherwise, the entry in this column displays No perspective. ● If you selected **Create with Measure Hierarchies** to generate the database, this column displays the name of the parent measure. The associated non-dimensional child measures that are used in the result formulas of the parent measure are displayed in CHILD_NAME. **Note:** A dimensional measure that is used in a result formula will not be displayed.
CHILD_UNIT	Name of the unit for the measure in CHILD_NAME .
CHILD_PTD_FREQ	Frequency with which period-to-date calculations are performed on measure results, such as monthly or weekly.

HPS_STAR_SCORECARDS

HPS_STAR_SCORECARDS contains this scorecard data:

Table 7 HPS_STAR_SCORECARDS Table Columns

Column	Description
SCORECARD_ID	Unique, system-generated ID created for the scorecard in CHILD_NAME. This is a foreign key to SCORECARD_ID in HPS_STAR_FACT.
CHILD_NAME	Name of each scorecard in the application.
PARENT_NAME	Name of the scorecard that is the parent of that in CHILD_NAME.
OWNER	Name of the employee who owns the scorecard in CHILD_NAME prefixed with “Owner”

HPS_STAR_DIM_Dimension_Name

This table is created for each user-defined dimension in an application.

Table 8 HPS_STAR_DIM_*dimension* Table Columns

Column	Description
CHILD_MEMBER_ID	ID of the member in the CHILD_NAME column. This is a foreign key to *dimension_name*_ID in HPS_STAR_FACT.
CHILD_NAME	Name of each member in the dimension prefixed with “dimension_name”
CHILD_ALIAS	Alias for the member in CHILD_NAME.
PARENT_NAME	Name of the Parent of the member in CHILD_NAME prefixed with “*dimension_name*”

HPS_STAR_EXTRA_OBJECT_NAME

This table contains a row for each measure and perspective referenced in the `HPS_STAR_FACT` table.

Table 9 HPS_STAR_EXTRA_OBJECT_NAME Table Columns

Column	Index	Description
`OBJECT_ID`	X	The Performance Scorecard ID for the measure, scorecard and dimensional measure.
`NAME`		Full name of each measure, scorecard and dimensional measure.
`TYPE`		Displays a type: ● dimensional measure ● simple measure ● perspective

Generating Star Schema Tables

Generate Star Schema tables for a predefined set of Performance Scorecard data. See "Generating Essbase Databases" on page 39.To regenerate the Scorecard Star Schema tables on a regular basis, schedule the star schema generation to automatically initiate the generation process. See "Scheduling Automatic Database Generation" on page 42.

Before generating tables, all spaces on the database schema must be set to be auto-expandable to ensure there is sufficient space to accommodate data being transferred.

Although you need not to followEssbase naming conventions now, you will if you later generate an Essbase database. If necessary, members are automatically renamed by the application to conform to the naming conventions. See the *Oracle Hyperion Performance Scorecard User Guide* for restricted characters.

➤ To generate Star Schema tables:

1. Select **Administration**, then **Star Schema Generation.**

   The Star Schema Generation page is displayed.

2. Under **Time Options**, for **Date Range**, select the option for the period of time for which to generate data in the Star Schema tables:

   - Calculate for All Dates.
   - Calculate for Dates, with an associated date range.

   Note: Unless you require all dates, select **Calculate for Dates** to transfer data for a restricted date range.

3. **Optional:** If you selected Calculate for Dates, click the calendar button, in **To Date** and **From Date** to select the first and last day in the range.

4 Under **Time Options**, for **Generate Star Schema Rows**, select the type of information to include in rows:

- **When Result, Target, Score Changes for a Measure or Scorecard**—Create a row for any result, target or scorecard that has changed.
- **For Days From Frequency**—Display the data for the selected frequency. This option only generates data for a measure or scorecard if that data is available on the frequency date. To set a frequency, click **Select**.
- **Every Day**—Display data for every day between the start and end dates.

5 Because the measure dimension in an Essbase database may contain composite measure hierarchies and perspective measure hierarchies, select an option from **Star Schema Structure**:

- **Create with Measure Hierarchies**—Generate a star schema that produces the default database containing composite measure structures. This includes composite measures, or measures used in the result formulas of other measures, in the Star Schema.
- **Create with Weights Included**—Create a Star Schema that generates a database that includes perspective-measure weightings. This presents perspectives as level 1 entities and the measures they categorize as their children.

  Note: This allows you to create data base query. See "Creating View Queries" on page 38.

- **Optional:** Select **Include Measures Linked to External Datasources** only if you will include data from an external source in the Star Schema. See "Using External Data Sources" on page 47.

6 **Optional:** Select **Conform to Essbase Naming Restrictions** to format all names using Essbase naming conventions. This may involve removing restricted characters from names, for example.

7 Click **Create Database.**

Performance Scorecard generates the HPS_STAR relational database tables. Access your database to view the results in the Star Schema tables.

You can use the results to generate reports through Interactive Reporting. See "Extended Customized Reporting" on page 65.

Creating View Queries

If you generate a Star Schema with the Weights option, create a SQL query using this command to return rows for measures and perspectives on a scorecard:

`select * from HPS_STAR_SCORECARD_VIEW` where `date` = *'yyyy-MM-dd'* and
`scorecard_id = `*`id`*

The result set contains rows for each measure and perspective on that scorecard. For example:

Table 10 Sample View Query

Date	Measure ID	Scorecard ID	Name	Dimensional Measure	Result	Target	Weight	Weighted Score	Score	Status Symbol Name
2006-02-01	4701	4301	HasResults(a)	T	15.0	20.0	0.5	37.5	75.0	Good
2006-02-01	4510	4301	HasResults(b)	T	1	4	0.5.	12.5	0.2	None

Generating Essbase Databases

You can generate an Essbase database that contains data that you select or Star Schema tables that provide predefined data. To regenerate Essbase databases on a regular basis, schedule generations. See "Scheduling Automatic Database Generation" on page 42.

Before Generating

Before you generate Essbase databases, perform these tasks:

- Ensure that theOracle Essbase Integration Services server is running on the same computer as your application database server.
- Start the Essbase OLAP server is running.
- Start the Essbase OLAP client is running on the application database server.
- Locate the directory to house the Integration Services XML files. These files define the structure of the Essbase database that is created.
- Load the Integration Services console to create a catalog.
- Set up a connection to the Scorecard database.
- Set up an ODBC connection to the database that houses the Integration Services metadata catalog.
- Set up an ODBC connection to the Performance Scorecard database.

  Note: If the Performance Scorecard and Essbase servers are on separate machines, create identical ODBC connections on both servers.

- Set all spaces on the database schema to be auto-expandable to ensure there is sufficient space to accommodate data being transferred.
- Ensure the dimensions, dimension members, databases, aliases, and targets names do not contain illegal characters. See the *Oracle Hyperion Performance Scorecard User Guide*.

Generating Essbase Databases

➤ To generate an Essbase database:

1 **Log on to Essbase.**

2 **In Performance Scorecard, select Administration, and then Star Schema Generation.**

The Star Schema Generation page is displayed.

3 **Under Time Options, select the Date Range for the data to include in the Essbase database. Unless you require all dates, select Calculate for Dates to transfer data for a restricted date range.**

4 **Optional: If you selected Calculate for Dates, set the date range:**

a. Beside **From Date**, click the calendar button, .

The Date Selector is displayed.

b. Choose the first date in the range, then click **OK**.

The selected start date is displayed.

c. Beside **To Date**, click the calendar button, .

The Date Selector is displayed.

d. Choose the last date in the range, then click **OK**.

The selected start date is displayed.

5 **Under Time Options, under Generate Star Schema Rows, select the options for the information to include in the database:**

- **When Result, Target, Scorecard Changes for a Measure or Scorecard**—Create a row for any result, target or scorecard that has changed from the previous day for that measure or scorecard.
- **For Days From Frequency**—Display data for the selected frequency, such as Daily, Weekly, and so on. This option only uses a date for a measure or scorecard if that date is in the set generated by the user selected frequency. To set a frequency, click **Select**, and choose the required frequency from the dialog box, then click **OK**.
- **Every Day** displays the data for every available date.

6 **Because the measure dimension may contain composite measure and perspective hierarchies in which perspectives are parents and measure children, specify a setting in Star Schema Structure:**

- **Create with Measure Hierarchies**—Generate a multidimensional database that produces the default Essbase database containing composite measure structures. Select this option to include composite measures, or measures used in the result formulas of other measures, in the database.
- **Create with Weights Included**—Create a multidimensional database that generates an Essbase database that includes perspective-measure weightings. Use this option to present perspectives as level 1 entities and the measures they categorize as their children in the star schema.

- **Include Measures Linked to External Datasources**—Use if specifying an external data source that contains data that is to be included in the database. See "Using External Data Sources" on page 47.

7 **Click Generate Essbase database.**

8 **Click Create Database**

Generation may take hours, depending on the number of dimensions, members, and measure results. `HPSImport.log` documents the generation process. Review this file if theEssbase database was not generated.

View the outline of the generated Essbase database in the Essbase Application Manager. To use data in Microsoft Excel, see "Retrieving Results in Microsoft Excel" on page 41.

For information about viewing or modifying the Essbase database, see the Essbase documentation.

Retrieving Results in Microsoft Excel

Microsoft Excel offers one option to retrieve and display database results, using the Essbase add-in menu in Microsoft Excel.

Note: If the Essbase menu is not displayed in Microsoft Excel, see your Essbase documentation.

➤ To view result data in Microsoft Excel:

1 Launch Microsoft Excel.

2 In Microsoft Excel, select **Essbase**, then **Connect**.

3 From **Server**, select the server you are using.

4 Enter a valid user name and password.

5 Click **OK**.

The available Essbase databases are displayed in the Application/Database list.

6 Select the database from which to retrieve results and click **OK**.

7 Select **Essbase**, then **Retrieve**.

The database dimensions are displayed at the top of the spreadsheet.

To create a custom report, see your Microsoft Excel or Essbase documentation.

Customizing Essbase Databases

After generating an Essbase database, you can use Integration Services and the Integration Services Console to modify or regenerate your Essbase database based on custom mappings.

Instructions for customizing Essbase databases are beyond the scope of this guide. For information about customizing databases, see the Essbase, Integration Services, and Oracle Essbase Administration Services documentation.

Scheduling Automatic Database Generation

If you regenerate a Performance Scorecard Star Schema tables or a Essbase multidimensional database on a regular basis, you can schedule generation using

`GenerateCube.bat` or `GenerateCube.sh`.

➤ To schedule automatic generation:

1 Navigate to `install\Middleware\user_projects\epmsystem1\HPS\hps1\hpsfiles\bin\generate_cube` and open GenerateCube.bat.

2 Open the file in a text editor.

3 Modify **set <entry> = value** For example, `set HPS_Server=mainserver`

This table identifies the entries you can change. Even if you do not generate an Essbase database, leave a value for the Integration Services and Essbase related entries. To generate the Star Schema, you must specify values listed in the Required column of the following table. Other entries are used to generate the multidimensional database only.

Table 11 GenerateCube Entries

Required	Entry	Required	Type	Description
x	JAVA_HOME	Yes	Directory	JRE installation directory
x	HPS_SERVER	Yes	String	Name of the computer running Performance Scorecard
x	HPS_PORT	Yes	Integer > 0	Port that Scorecard is listening to. By default, this port is 18080.
x	HPS_APPLICATION	Yes	String	Name of the Performance Scorecard web application specified during deployment.
x	XML_FILE	Yes	Directory + Filename	Directory containing the XML files required by Oracle Essbase Integration Services to create the Essbase database
	ESSBASE_SERVER	No	String	Name of the computer running the Essbase server
	ESSBASE_APPLICATION	No	String	Name of the Essbase application under which the generated database will be placed. The name must not exceed 8 characters and must conform to the Essbase Naming Conventions.
	ESSBASE_CUBE	No	String	Name for the Essbase database to be generated. The name must not exceed 8 characters and must conform to the Essbase Naming Conventions.

Required	Entry	Required	Type	Description
	SOURCE_DSN	No	String	Name of the ODBC connection to the Performance Scorecard database
	CATALOG_DSN	No	String	Name of ODBC connection to the AIS Catalog database
x	GENERATE_CUBE	Yes	Boolean	● **True** to generate the Essbase database ● **False** to only generate the Star Schema tables.
	cubeMeasure	No	String	Generate the Essbase database using the hierarchical structure.
	cubeWeights	No	String	Generate the Essbase database with Weights included.
x	FROM_DATE	Yes	Date	Enter the start date for which database rows are generated in yyyy/MM/dd format.
x	TO_DATE	Yes	Date	Enter the last date for which the database rows are generated, in yyyy/MM/dd format
	CONFORM_TO_ESSBASE_NAMING	No	Boolean	TRUE to modify measure and scorecard names to conform to Essbase naming rules.
x	ROW_FREQUENCY	Yes	Integer	0 - Generate Star Schema rows only when result, targets or scores change 1 - Generate rows based on a frequency. You must complete these fields: FREQUENCY_CODE SUB_FREQUENCY_CODE INTERVAL DAY_OF_PERIOD 2 - Generate a row for every day
x	FREQUENCY_CODE	Yes	Integer	Required if ROW_FREQUENCY = 1. Enter the value for the frequency type: 0 - None 1 - Daily 2 - Daily MF (Monday to Friday, excluding weekends) 3 - Weekly 4 - Semi-Monthly 5 - Monthly 6 - Quarterly 7 - Semi-Annually 8 - Annually 9 - Monthly, Week Based

Required	Entry	Required	Type	Description
x	SUB_ FREQUENCY_ CODE	Yes	Integer	Required if ROW_FREQUENCY = 1. Enter the value for the sub-frequency type: 0 - First 1 - Last 2 - Sunday 3 - Monday 4 - Tuesday 5 - Wednesday 6 - Thursday 7 - Friday 8 - Saturday 9 - First Sunday 10 - First Monday 11 - First Tuesday 12 - First Wednesday 13 - First Thursday 14 - First Friday 15 - First Saturday 16 - Last Sunday 17 -Last Monday 18 - Last Tuesday 19 - Last Wednesday 20 - Last Thursday 21 - Last Friday 22 - Last Saturday 23 - User Defined 24 - No Weekend
x	INTERVAL	Yes	Integer	Required if ROW_FREQUENCY = 1. Enter the value for the interval. The value must be greater than 0.
x	DAY_OF_PERIOD	Yes	Integer	Required if ROW_FREQUENCY = 1. Enter the value for the sub-frequency type in the format "*x* day of period." The value must be greater than 0.

Required	Entry	Required	Type	Description
x	LOG_LEVEL	Yes	String	Level of information provided about the generation process: ERROR WARN INFO DEBUG

4 Save the file.

5 Schedule the database generation. Select **Start**, then **Programs**, then **Accessories**, then **System Tools**, then **Scheduled Tasks**, and then **Add Scheduled Task.** The Scheduled Task Wizard is displayed.

6 Follow the prompts to create a schedule. This includes navigating to the `GenerateCube` file, selecting a frequency, and specify a start date and time.

The Star Schema or multidimensional database generation runs accordingly. Errors are posted to the console.

4 Using External Data Sources

In This Chapter

About External Data Sources

External data sources can be used to populate a model with metadata and data. You can use data from multiple external data sources, such as Essbase, to generate a single Performance Scorecard database. Dimensional measures that retrieve their data from external data sources must already exist within the Performance Scorecard application. If you are using Essbase, you can make changes in the source or destination and the changes are reflected instantly.

After defining the external data sources, you point to those external data sources through the Measure Template Setup and Target Setup pages in Performance Scorecard. If required, you can select an Allow updates option to ensure any changes made in Scorecard are written back to the external data source. If changes are made in the external data source, you can synchronize the metadata and data with Scorecard.

When selecting dimension to import, a dimension can only be selected once. After it is used, the same dimension cannot be selected again.

To maximize performance, perform calculations in the external data source first, and then import the calculated values. This enhances the import time, and ensures that complicated calculations are accomplished in the application to which they are best suited.

External dimensions are not displayed in the Dimension Setup page, and cannot be modified in Scorecard.

Essbase Database Requirements

If you use an Essbase multidimensional database as an external data source, the database must meet these requirements:

- Have a single dimension containing the members that correspond to measures used in Performance Scorecard, such as the Accounts dimension.
- Have a single dimension containing the members corresponding to targets used in Scorecard, such as the Results.
- The dimension in the database that corresponds to time must use one of these conventions:
  - A single dimension
  - Two dimensions: one dimension for intra-year periods, such as months or quarters, and one dimension for the years. Members corresponding to individual years must be placed at the leaves.
- Place the results within the intersection of the dimensions, or have a member in the Values dimension that corresponds to results
- Does not have time elements that are more frequent than daily.

Caution! If the Performance Scorecard and Essbase servers are installed on different computers add the same ODBC system DSN to each computer.

About Defining External Data Sources

Importing dimensions and values from external sources such as Essbasecubes or applications into Performance Scorecard involves these tasks

- "Defining External Data Sources" on page 48.
- "Selecting Required Dimensions and Values" on page 49.
- "Specifying Time Mapping" on page 50.
- Selecting additional dimension to import and the level of data to include. to include.
- "Selecting Pinned Dimensions and Defining Targets" on page 51
- Selecting the external data source when creating dimensional measures and targets. See "Creating Measure Templates" on page 52

Defining External Data Sources

Note: If you are defining a connection to an Essbase database that does not exist on the selected Essbase server, ignore the warning that displays, and select the new application, cube, and alias table.

For information about pointing to an Essbase database in a target environment to which you have promoted, see Chapter 5.

➤ To define external data sources:

1 To use anEssbase database as an external source, start the Essbase server before the application server.

2 In Performance Scorecard, select **Administration**, and then **Data Source List.**

The Data Source List is displayed.

3 Click **Add**, or select an existing connection and click **Edit.**

The Data Source tab is displayed.

4 Under **Data Source Type Specification**, select the data source to use and click **Next.**

The General Attributes tab is displayed, showing the Data Source General page.

5 In **Name**, enter unique name. This name is used when you select the external data source on the Measure Template Setup page.

6 In **Description**, enter a brief explanation of the contents or purpose of this external data source.

7 In **Server**, enter the name of the computer that is hosting the server.

8 In **Port**, enter the port number of the Essbase server.

9 In **User Name**, enter the user ID that is used to log on to the database.

10 In **Password**, enter the password used to log on to the database.

11 In **Application**, select the Essbase application that contains the multidimensional database.

12 In **Essbase Database**, select the database that contains the data to use.

13 In **Alias Table**, select the table that contains the alternate names for dimensions, if available. There may be more than one for each database.

14 **Optional:** Click **Test Connection** to ensure that you can connect.

15 Click **Next** or select the **Measure Dimensions** tab, and see "Selecting Required Dimensions and Values" on page 49.

Selecting Required Dimensions and Values

➤ To select dimension values to import:

1 Under **Measure Dimension**, click **Select .** The External Dimension List is displayed, listing dimensions in the database.

2 Select the measure dimensions to import. Dimensional measures that retrieve their data from external data sources and the dimension members to which they relate must exist in Performance Scorecard.

3 Click **Next** or select **Value Dimensions** tab.

4 From **Value Dimension**, select the name of the Essbase dimension that was set as the **Values** dimension. Use the Values Dimension tab to specify the dimensions in the external database that identify the results, and the extend of result detail to display in Performance Scorecard.

5 Click **Next.**

6 Under **Result Member**, click **Select** to choose the Values dimension member that contains the results to use. The Result Member box is displayed, showing members for the Value dimension. Select the

appropriate Results Member. Dimensional measures that retrieve their data from external data sources and the dimension members to which they relate, must exist inPerformance Scorecard

7 Click **Next** or select the **Time Mapping** tab, and see "Specifying Time Mapping" on page 50.

Specifying Value Dimensions

➤ To select value dimensions:

1 From **Value Dimension**, select the name of the Essbase dimension that was set as the **Values** dimension. Use the Values Dimension tab to specify the dimensions in the external database that identify the results, and the extend of result detail to display in Performance Scorecard.

2 Click Next.

3 Under **Result Member**, click **Select** to choose the Values dimension member that contains the results to use. The Result Member box is displayed, showing members for the Value dimension. Select the appropriate Results Member. Dimensional measures that retrieve their data from external data sources and the dimension members to which they relate, must exist inPerformance Scorecard

4 Click **Next** or select the **Time Mapping** tab, and see "Specifying Time Mapping" on page 50.

Specifying Time Mapping

Map the time dimensions in the external data source to those used in Performance Scorecard.

➤ To map time-related dimensions:

1 From **Time Dimension Count**, select a value as follows:

- Select 1 to hide the Year Dimension and Select Year Dimension elements. This option is set as the default.
- Select 2 to show the Year Dimension and Period Dimension elements.

2 Under **Period Dimension**, click **Select.**

3 From the **Period Dimension List**, set the period dimension label to the selected dimension.

4 Under **Start Date**, click the calendar button, and then select the Start Date that maps to the first member in the time and year member.

Tip: To reverse the order of dimensional members mapped to dates, select In Reverse Order.

5 Under **Period Generation**, click **Select** and choose the member from the dimension to represent the generation or depth of the dimension to use in Performance Scorecard. For example, if you select "January," the monthly generation is used. If you select "week 1," the weekly generation is used.

6 From **Period Generation Significance**, select the required frequency for the time dimension generation, such as Day, Week, Month (default) or Quarter. These attributes provide date values for each row. If these attributes are changed, Performance Scorecard regenerates this table with default values.

7 **Review the dates for the pairs of time members. These members are taken automatically from the Essbase database, showing the generation level that you selected. Click the Calendar button to select a different date for individual members. To remove one or more members from the generated database, click Delete**

8 Click **Next** or select the **Other Dimension** tab.

Selecting Other Dimensions

To import other, more general or miscellaneous external dimensions select the **Other Dimensions** tab and perform these steps.

➤ To import other dimensions:

1 Click **Add.** The Other Dimension List is displayed, identifying other external dimensions you can use.

2 Select the dimension to import. A row is added to the table.

3 From **Dimension Depth**, select the number of levels of data to import for the dimension. Zero (0) represents the root level.

Levels that you add in the future may require you to redefine the external data source to accommodate the levels. For example, if you select a highest depth of 3 for three levels, even if additional levels are added, only three levels are reported. However, the selection "No Restriction" returns values for all levels, and automatically adds any future extra levels.

4 Click **Next.**

Selecting Pinned Dimensions and Defining Targets

Select the Pinned dimensions for static values, such as currency, and select targets.

➤ To import the remaining and pinned dimensions:

1 Click **Add.** The Other Dimension List is displayed, identifying other external dimensions you can use.

2 Select the dimension to import. A row is added to the table.

3 From **Dimension Depth**, select the number of levels of data to import for the dimension. Zero (0) represents the root level.

Levels that you add in the future may require you to redefine the external data source to accommodate the levels. For example, if you select a highest depth of 3 for three levels, even if additional levels are added, only three levels are reported. However, the selection "No Restriction" returns values for all levels, and automatically adds any future extra levels.

4 Click **Next.** The Pinned Dimensions tab is displayed. Pinned dimensions contribute the same status members to all data queries to Essbase multidimensional databases.

For example, if the multidimensional database contains a "Scenario" dimension, and they only want to view the "Current" scenario within Performance Scorecard, pin the dimension "Scenario" to "Current." These dimensions do not need to be imported into Performance Scorecard, but may be required to provide perspective to data queries. Using the Pinned

Dimensions tab, you can specify the pinned members for non-attribute dimensions, such as Measures, Values or Time.

5 Select the name of the dimension in the external data source to update the "Pinned Member" label, then click **Save.** The Pinned Member is the name of the member that is used in data queries to provide perspective for the database view, for example, a currency or version

6 Create the target for the value in the external data source. See the *Oracle Hyperion Performance Scorecard User Guide*. Click the **Datasources** tab and click **Edit** to select appropriate dimension member in the external datasource.

7 See "Creating Measure Templates" on page 52.

Creating Measure Templates

➤ To create measure templates:

1 Log on to Performance Scorecard as a designer.

2 On the Object View, select **Measure Template List** and create a measure template. See the *Oracle Hyperion Performance Scorecard User Guide*.

3 Under **External Data Source**, select the external data source you created.

4 Beside **Member**, click **Select** to select the appropriate member

5 For Essbase: Click **Allow Updates** to write data back to the external data source.

6 On the **Dimension/Member** table, select the dimensions and members to use.

7 Under **Dimensions**, select the dimension to use. This lists dimensions that you choose on the Other Dimensions tab.

8 Move measures in **Candidates** to **Measures** to generate dimensional measures using values in the external datasource. See the *Oracle Hyperion Performance Scorecard User Guide*.

Modifying External Data Sources

You can modify an external data source to change the depth restriction, members or other information.

Important: If you modify an EssbaseEssbase application or database, note that these checks are made, and that you may be asked how to proceed:

- The application name or database dimensional structures are compared. If they differ, but you want to proceed, you must redefine all associated dimensional mappings and Measure Templates.
- The existing dimension mappings are compared to that in the selected application or database. If they differ, but you want to proceed, create a new mapping and modify all measure templates associated with the database, or cancel.

➤ To modify an external data source:

1. **In Performance Scorecard select Administration, and then Data Source List.**

   The Data Source List is displayed.

2. **Select the name of the external data source.**

3. **Click Edit.**

   The Data Source General page is displayed.

4. **Select each tab to change general settings and required dimension mappings. See "Defining External Data Sources" on page 48.**

5. **Click Save.**

Deleting External Data Sources

Although you can delete an external data source, Oracle recommends that you delete the associated measure templates before deleting the external data source.

Caution! If you delete an external data source, all measures related to that data source are deleted from Performance Scorecard.

➤ To delete an external data source:

1. **Log on to Performance Scorecard as a Designer.**

2. **Select Administration, and then Data Source List.**

   The Data Source General page is displayed.

3. **Select the name of the external data source to be deleted.**

4. **Click Delete. A confirmation message is displayed.**

5. **Click Yes to confirm the deletion.**

   The external data source and any related measures and results are deleted from Performance Scorecard. Also, the pointer to the external data source on the Measure Template page, and the target on the Target Setup are also removed.

Synchronizing Essbase with Imported Data

If changes are made in the external data source, you must synchronize the metadata and data withPerformance Scorecard in these circumstances:

- Changes to metadata involve modifications to the multidimensional database outline or structure. For example, to add a new department to the corporate organization would require changes to the outline.
- Changes to data involve modifications to the values for an item. For example, you might want to modify figures in your Budget to reflect an increase or decrease in the budget values.

➤ To synchronize Performance Scorecard with the external data source:

1 In Performance Scorecard, select **Administration**, and then **Data Source List.**

The Data Source List is displayed.

2 Select the external data source which needs to be synchronized with changes in Performance Scorecard.

3 Depending on the type of changes made in the external data source, synchronize Performance Scorecard:

- Click **Metadata Synchronize** if the metadata in the structure of the database has been modified. For example, if the corporate structure is realigned, the new organizational structure must be reflected in the database outline.
- Click **Data Synchronize** if the data in the database has been modified. For example, if your budget value is increased, click Data Synchronize to show the new values on the imported measure template.

If changes have been made to the both metadata and data, perform both operations. If no matching external data source is found, an error message is displayed. Review the external data source settings, and try again.

A confirmation message is displayed when the synchronization is complete.

5 Migrating Data

In This Chapter

Migration Options

You can transfer data between disparate environments by migrating data as follows:

- Using the *Life Cycle Management (LCM)* feature provided with Shared Services. This tool enables you to migrate the following between environments:
  - Entire Performance Scorecard application metadata.Migrate this data using the Application Model artifact. Data is written to an `XML` file that you can import to a destination environment.
  - Performance Scorecard accounts with their custom security settings such as associated employees, primary domain, and security roles. Migrate this data using the Model Security artifact. Data is written to a `CSV` file that you can edit and import to other environments.

  This tool also enables you to export to, and import metadata from, a file system. You perform migrations from the Shared Services Console or from a command line utility. See the *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*.
- Using Performance Scorecard promotion.

Use Life Cycle Management to perform these tasks:

- Repeatedly migrate all artifacts from one Performance Scorecard application to another
- Migrate imported artifacts from a file system
- Export migrated artifacts to a file system
- Migrate Performance Scorecard accounts (including associated security settings such as security roles, primary domain etc.)

- Migrate to multiple destination environments

Use Performance Scorecard promotion to perform these tasks:

- Migrate only metadata that has changed since the previous promotion
- Migrate metadata deleted from an application since the previous promotion
- Migrate metadata from multiple source environments
- Migrate metadata to multiple destination environments

About Promotion

Promotion enables you to copy application metadata from one environment, such as development, to another, such as testing. It ensures that changes made to a source application are reflected in other destinations and environments. You can share metadata between supported platforms, databases, and Web application servers. For example, you can promote an application created in a development environment using IBM DB2 and WebSphere to a test environment that uses Oracle and WebLogic.

See:

- "External Application Profiles" on page 56
- "Non-Promotable Business Objects" on page 56
- "Requirements" on page 57

External Application Profiles

Performance Scorecard records the server connection information used to promote data to different environments. These connection settings, called external application profiles, include the target application's host name, port number, user ID, and password.

Non-Promotable Business Objects

Although you can promote most business objects, some such as measure results and target values, should not be promoted because they contain data that is usually manually entered by end users.

These business objects cannot be promoted:

- Measure results and target values
- User accounts, security roles, permissions, and restrictions
- Initiatives
- Notes
- Variable values
- Uploaded attachments and files

Requirements

Before promoting metadata, perform these tasks:

- Ensure that all users have logged off of the target and destination Performance Scorecard application.
- Ensure that the database for the target application is correctly configured and running.
- Ensure that the admin security role is assigned to the account of the user whose ID is used to access the target application.
- Ensure that you have this data required to connect to the target application and database:
  - Name of the computer hosting the database
  - Application name
  - Web server port number
  - Username and password to access the Performance Scorecard application on the computer hosting the database

Note: You cannot promote data if you delete any records in the `HPS_AUDIT_TRAIL` database table. To compact records, use the Compact Audit Trails function.

Promoting Data

The time it takes to promote data depends on the size and complexity of an application.

➤ To promote data:

1. See "Requirements" on page 57.
2. Select **Administration**, and then **Promotion**.

   The Configured External Application list is displayed. Each external application contains the settings required to connect to Performance Scorecard applications in different environments.
3. Click **Add**.

   The External Application Setup page is displayed.
4. In **Name**, enter the name of the environment or application, such as Production.
5. In **Description**, summarize the location of the external application.
6. In **Server Name**, enter the name of the server hosting the target Performance Scorecard application .
7. In **Server Port**, enter the server port number.
8. From **Server Protocol**, select a protocol.

   Note: HTTPS lengthens the promotion process.
9. In **Application Name**, enter the name for the application.

10 In **Server Login**, enter the user ID used to access the target Performance Scorecard application.

Note: The user ID must have the admin security role.

11 In **Password**, enter the password to access the target application.

12 From **Promotion Profile**, select a profile.

13 **Optional:** Click **Test Connection** to ensure that you can connect to the target application.

14 Click **Save.**

15 Select the external application that you created and click **Promote to Selected Application.**

Referencing Different Essbase Databases After Promotion

In previous releases, if you promoted an Essbase database you had edit the HPS_EXTERNAL_DATASOURCE database table on the target server to reference the correct Essbase application and database in the target environment. You can now reference another Essbase database by modifying its connection. For example, to promote from a development environment that uses a development-dedicatedEssbase database to a production environment with its own Essbase database, reference the production database by changing these connection settings:

- Host name
- Logon credentials
- Application name
- Database

Note: The Essbase database in the target environment must have the same dimensional structure and mappings as that in the source. If it does not, you must remap all dimensions and your measure templates. See "Modifying External Data Sources" on page 52.

EPM System Lifecycle Management

EPM System Lifecycle Management provides a consistent way for EPM System products to migrate an application, a repository, or individual artifacts across product environments and operating systems. Generally, the Lifecycle Management interface in Shared Services Console is consistent for all EPM System products that support Lifecycle Management. However, EPM System products display different artifact listings and export and import options in the Lifecycle Management interface.

Lifecycle Management features:

- Viewing applications and folders
- Searching for artifacts

- Comparing applications and folders
- Migrating directly from one application to another
- Migrating to and from the file system
- Saving and loading migration definition files
- Viewing selected artifacts
- Auditing migrations
- Viewing the status of migrations
- Importing and exporting individual artifacts for quick changes on the file system

In addition to providing the Lifecycle Management interface in Oracle's Hyperion® Shared Services Console, there is a command-line utility called Lifecycle Management Utility that provides an alternate way to migrate artifacts from source to destination. The Lifecycle Management Utility can be used with a third-party scheduling service such as Windows Task Scheduler or Oracle Enterprise Manager.

Lastly, there is a Lifecycle Management Application Programming Interface (API) that enables users to customize and extend the Lifecycle Management functionality.

For detailed information about Lifecycle Management, see the *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*.

Using Life Cycle Management

You will perform the following tasks to migrate account accounts or metadata using LCM. For detailed instructions, see the *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*.

1. In Shared Services, select **Scorecard**, and then **Performance Scorecard**.

   The Artifact List is displayed.
2. Perform a task:
   - To migrate the application, select **Application Model**.
   - To migrate accounts, select **Model Security**.
3. Click **Define Migration**.
4. Specify the directory (file system) to which to migrate.
5. Perform a task:
   - To migrate, click **Execute Migration**.
   - To save the migration settings to perform batch migrations, click **Migration Definition**.
6. Copy exported files to the destination environment.
7. In Shared Services, expand the File System node in Application Groups.
8. Select the directory to which you copied the files.

9. Select the artifact to migrate (imported) from the file system.
10. Click **Define Migration**.
11. Specify the destination environment.
12. Execute or save the migration definition.

6 Backing up and Restoring Attachments

In This Chapter

Backing up Attachments

File attachments for objects such as measures, notes and annotations are stored in a folder on the Web application server. Back up this directory on a regular basis and before uninstalling or upgrading Performance Scorecard.

➤ To back up attachments:

1. Create a local or network backup directory.
2. Select **Administration**, and then **Attachment Backup**.

   The Backup Directory page is displayed.
3. In **Backup Directory**, enter the path to the backup folder you created.
4. Click **Backup**.

   All attachment files are placed in this directory.

Restoring Attachments

This section explains how to restore attachment files from a backup directory after reinstalling or upgrading the Web application server.

➤ To restore attachments:

1. Select **Administration**, and then **Attachment Backup**.

   The Backup Directory page is displayed.
2. In **Backup Directory**, enter the path to the backup directory and click **Restore**.

   The attachment files are available to the Web application server and are displayed in applications.

7 Managing Alerts

In This Chapter

Alerts

The Performance Scorecard Alerter (Alerter) enables users to monitor corporate, business unit, and individual employee performance by notifying subscribers by E-mail when the performance of key business metrics falls within or outside of a defined acceptable range. Alerts also prompt subscribers when tasks such as measure result collection or initiative completion are approaching, due, or overdue.

There are two types of alerts:

- Personal alerts are created by a user to alert that individual about the status of a measure for which they are responsible. Personal alerts apply to only that user, and cannot be accessed by anyone else.
- Public alerts function like regular alerts except that public alerts can be subscribed to by other users. You can also use public alerts as templates to quickly generate new alerts that have common attributes.

The Alerter is configured during the installation of Performance Scorecard. See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

After creating alerts, users or groups subscribe to them by creating a subscription or by using one-step subscription.

When an alert is triggered, alert notifications are sent by E-mail to each user subscribed to the alert to advise that the business object being monitored is in an alert state. The content and frequency of these alert notifications are specified when each alert is created. At this point, users can acknowledge the alert notification, unsubscribe from the alert to no longer receive notifications, or click the link provided in the notification to log on to their application to investigate the business object in alert. See the *Oracle Hyperion Performance Scorecard User Guide*.

Use the Alerter Process Report to monitor alert and alert notification activity such as the number of alert notifications sent and when each notification was sent. See "Using the Alerter Process Report" on page 64.

Using the Alerter Process Report

The Alerter Process Report provides this information:

- Alert names
- Names of the objects in alert
- When and to whom alerts were sent
- Status
- Acknowledgement status

➤ To access the Alerter Process Report, select **Administration**, then **Alerter**, and then **Alerter Process Report**. Review the report to ensure subscribers respond appropriate to alert and to monitor alert activity.

8 Extended Customized Reporting

In This Chapter

About Interactive Reporting Integrations

You can use Interactive Reporting Studio to directly access Performance Scorecard data through Star Schema database tables. The reports are presented in a combination of tables that provide detailed and summary information, and graphical charting of those results.

By default, these pre-formatted Performance Scorecard reports are available through Interactive Reporting:

- "Scorecard Report " on page 66
- "Scorecard with Measure Trends" on page 67
- "Strategy Scorecard" on page 67

The Star Schema tables are used by an Administrator to generate Essbase databases and Interactive Reporting reports. The data that is displayed in the reports is obtained from the Star Schema tables that are generated in Performance Scorecard. For additional information, see "Star Schema Tables" on page 33.

1. Create an ODBC connection, and add the connection to the DAS service.
2. Create a database connection (an `.oce` file), that contains connection parameters. The integration retrieves results from the Interactive Reporting Server, using BQY files that are also created in Interactive Reporting. For detailed instructions on creating the `.oce` file, see the Interactive Reporting documentation.
3. Publish the `OCE` file.
4. Publish the `BQY` file, which contains the queries and display parameters for the information to be generated for the report. You can use the default BQY files, or create your own. For more information, see the Interactive Reporting documentation.

5. After the files have been set up in Interactive Reporting, launch Performance Scorecard to generate the Star Schema database, and create the custom report links to view the reports.

Default Generated Reports

By default, these pre-formatted Performance Scorecard reports are available:

- "Scorecard Report " on page 66
- "Scorecard with Measure Trends" on page 67
- "Strategy Scorecard" on page 67

Each report is generated by a pre-formatted `BQY` file that specifies the Smart Cut parameters used to generate the report. You can modify the `BQY` files used for the default reports as a starting place to create your own customized reports.

Apart from the default reports, you can also create Generic reports that enable you to customize Interactive Reporting reports. The Generic reports can be used to report on several scorecards or measures, or to access more dates than the default reports. You can also use this option to generate reports on queries, such as a Debug report.

Scorecard Report

The Scorecard Report is generated by the `Scorecard.bqy` that uses these Smart Cut parameters:

- ScorecardName is the name of the scorecard in Performance Scorecard.
- Date is the reporting date for the scorecard, in the format `MMDDYYYY`, where `MM` starts at 01 for January.

The Report provides the details of the selected employee scorecard. This report displays both measures and dimensional measures. You can view all, or some of the available scorecards. The details are presented in table and graphical format.

Use the list to select measures on the report for review.

The report provides this information:

- Scorecard name
- Perspective, if available
- Measure name
- Measure unit
- Measure Target
- Measure Result
- Measure Score
- Performance Indicator

Scorecard with Measure Trends

The Scorecard with Measure Trends Report is generated by the `Scorecard_withTrend.bqy`. This file uses these Smart Cut parameters:

- ScorecardName is the name of the scorecard in Performance Scorecard
- Date1 - Date6 requires at least one of the six dates

The Scorecard Report with Measure Trends provides the Trending Table details for one or more measures on the selected scorecard. You can view all, or some of the available scorecards. The details are presented in a table format, and the values and performance indicator enable you to evaluate the trend for the selected measure for the specified date or date range.

Note: This report does not display dimensional measures.

The Display Measure list displays all of the measures that are listed on the report. Use the list to select an individual measure from the report for review.

The Employee Scorecard Report with Trends provides this information:

- Measure name
- Performance Indicator
- Measure score, result and target for each selected date

See the *Oracle Hyperion Performance Scorecard User Guide*.

Strategy Scorecard

The Strategy Scorecard Report is generated by the `StrategyDashboard.bqy`. This file uses these Smart Cut parameters:

- ScorecardName is the name of the strategy element in Performance Scorecard
- Date1 - Date6 requires at least one of the six dates

The Strategy Dashboard Report provides an overview of the components of the strategic objectives, including a graphic display of the current results versus targets for a selected measure. The dashboard offers the opportunity to view the current progress of the strategy, add notes regarding the analysis, opportunities and issues that apply to the strategy, and to view actions or strategic initiatives.

Note: This report does not display dimensional measures.

Use the Measure list to select measures on the report for review. The Results versus Targets are displayed in a graphical format.

The Strategy Dashboard provides this information:

- Selected dates or date range for the strategy
- Strategy owners
- Strategy Name and description
- Perspective, if available
- Theme
- Name of the associated measures, available from the list
- Bar chart that illustrates the Results versus Target for the selected measure for the strategy. This chart is only displayed if a unit is associated with the measure.
- Notes and comments on various subjects relating to the strategy to provide analysis of the strategy, opportunities for improvement or change, or issues that must be addressed.
- Current Actions and Strategic Initiatives that are associated with this strategy

See the *Oracle Hyperion Performance Scorecard User Guide*.

Generic Performance Scorecard Reports

The Generic report option enables you to use Interactive Reporting reports. The Generic reports can be used to report on several scorecards or measures, or to access more dates than the default reports. You can also use this report option to generate reports on queries, such as a Debug report.

Extended Reporting through Interactive Reporting

You can generate reports through the Interactive Reporting from the Performance Scorecard database, as outlined in these procedures:

- Create an Interactive Reporting database connection (OCE file). See "Creating .OCE Datbase Connection Files" on page 68.
- Import the `.OCE` file. See"Importing .OCE Files Using EPM Workspace" on page 69.
- Publish the `BQY` file. See"Importing the BQY File through EPM Workspace" on page 70.
- Generate the Star Schema database and the report. See"Generating an Interactive Reporting Report" on page 71.
- View the reports. See "Viewing Generated Reports" on page 72.
- Create links to the generated reports. See "Adding Links to Custom and Interactive Reporting Reports" on page 72.

Creating .OCE Datbase Connection Files

An Interactive Reporting database connection file (`OCE`) is a portable file that describes the connection to your data source for the relational or Essbase database. The `.OCE` file can be created in Interactive Reporting, and stores information about the BQY's (queries) database connections, such as user names and passwords.

If you frequently generate the same report, use the same .OCE file. If you create custom reports using data from multiple sources, you may require multiple .OCE files for one report.

➤ To create an Interactive Reporting .OCE file:

1 Create an ODBC connection on the Interactive Reporting computer to the database for the report.

2 Select **Start**, then **Synchronize With Shared Services**, then **Programs**, then **Interactive ReportingUtilities and Administration**, and then **Service Configurator.**

   Select the DAS service and add the ODBC connection information including the connection type (ODBC), database type and the name of the data source, which is the ODBC connection name.

3 Select **Start**, then **Programs**, then **Oracle EPM,** and then **Interactive Reporting Studio** to create the .OCE file.

   The Database Connection Wizard is displayed.

4 Under **Create a New Document**, click **A New Database Connection File**, and select **Repository Document** from the list.

5 Define the database connection as follows:

   - Select **ODBC** as the type of connection software.
   - Select the type of database you are using, such as Oracle.
   - Enter the database User Name and password
   - Enter the IP address or name of the ODBC database host

6 Click **Finish.**

7 Save the file.

8 Close Oracle's Hyperion® Interactive Reporting Studio.

   Publish the OCE file to the Interactive Reporting Server. See "Importing .OCE Files Using EPM Workspace" on page 69.

Importing .OCE Files Using EPM Workspace

After creating the .oce file, it must be imported to the EPM Workspace server for use in generating the reports.

➤ To import the .OCE file:

1 Log on to EPM System as an Administrator, and ensure that the Workspace Agent Service and Web Application Service are running:

2 Select **Explore** and navigate to the location of the repository.

3 Right-click, and then select **New Folder** to create a folder for the imported file. If you do not want to create a folder, leave the file under the Root (/:).

The Create New Folder dialog box is displayed.

4 **Enter the name of the new folder, then click OK.**

5 **Select the new folder.**

6 **Right-click to display the shortcut menu, and select Import, then File to publish the `.OCE` file in Interactive Reporting.**

7 **Under File on the tab that displays, click Browse to navigate to the `.OCE` file.**

By default, the file is in: `C:\Hyperion\products\BIPlus\data\OpenCatalogExtensions`.

8 **Click Next.**

9 **Under Processing OCE Options, select these options and information:**

- From **Data source access**, select **Use the username/password specified below**.
- Enter the **Username** and **Password** for the database.
- Select **Allow pass-through where end user's authentication system is enabled for it**.

10 **Click Finish.**

11 **Publish the file.**

Importing the BQY File through EPM Workspace

Within Interactive Reports, a report is stored as a `BQY` file. This file contains the formatting and structure for the report.

These sample `BQY` files are provided:

- `Scorecard.bqy`. See "Scorecard Report " on page 66
- `Scorecard_withMeasureTrend.bqy`. See "Scorecard with Measure Trends" on page 67
- `StrategyDashboard.bqy`. See "Strategy Scorecard" on page 67

You can modify these files used for the default reports as a starting place to create your own customized reports.

➤ To import `BQY` files:

1 **Log on to EPM Workspace as an Administrator.**

2 **On the View Pane, navigate to the location of the `BQY` folder.**

3 **Right-click on the folder to display the shortcut menu, and select Import File to access the sample reports.**

The Choose File tab is displayed.

4 **Under File, click Browse to navigate to the `BQY` file, then click Next. By default, the sample files are located in `install\Middleware\EPMSystem11R1\products\PerformanceScorecard\AppServer\InstallableApps\common\Reports\Template_BI+`.**

5 Click **Next.**

6 On the tab that displays, click **Edit Permissions.**

7 Select the users, roles or groups who are to be given access to the report from the **Available Users, Groups and Roles** list.

8 Move the identified users to the **Selected Users, Groups and Roles** list.

9 Click **Edit.**

10 From **Edit Permissions**, select the appropriate level of **Access to File**, such as No Access or Full Control.

11 Select the **Adaptive State**, or the level of access the user will have to modify the report, such as View Only or Query and Analyze.

12 Under **Favorite**, select **Empty.**

13 Click **OK** to close the Edit Permissions dialog box.

14 From the Properties dialog box, click **OK** to save the new permissions.

15 Click **Next.**

The IR Properties tab is displayed. This tab is used to associate the queries with the BQY file.

16 From the **Set all queries to obtain the username/password:** list, select **From OCE Default.**

17 From **Connection**, select the OCE file for each **Query/Data Model Name.**

The Username Password and Options information is automatically populated from the `.oce` file.

18 Under **Interactive reporting Options**, select **Enable ADR.**

19 Click **Go.**

The Username Password and Options information is automatically populated. The report is published and available in Performance Scorecard. See“Generating an Interactive Reporting Report” on page 71.

Generating an Interactive Reporting Report

After you create and import the OCE and BQY files, you can generate the selected report.

➤ To generate a report through Interactive Reporting:

1 From the Windows menu, select **Start**, then **Settings**, then **Control Panel**, and then**Services** to display the Services window.

Ensure the Workspace Agent Service and Workspace Web Application services are running:

2 Launch EPM Workspace, using

`http://`*`server:port`*`/workspace`

3 Log on to Performance Scorecard as an Administrator.

4 Select **Administration**, and then **Star Schema Generation.**

The Star Schema Generation page is displayed.

5 Select the settings you require to generate the Performance Scorecard Star Schema tables:

- Under **Time Options**, select the dates for which to view results. If you do not need data for all dates, select **Calculate for Dates** from **Date**, and select a date range from the calendar.
- Under **Generate Star Schema Rows**, select the dates that you require data to be generated for the report.
- Under **Star Schema Structure**, select the appropriate option. If you use measure weights, select **Create with Weights Included**.
- Disable \ Do NOT select these options:

a. Conform to Essbase Naming Restriction

b. Generate Essbase Database

6 Click **Create Database.**

7 **Optional:** Create a link to the report. See "Adding Links to Custom and Interactive Reporting Reports" on page 72.

Viewing Generated Reports

After generating custom reports through Interactive Reporting, you can view them in Performance Scorecard. You can also add links from Reports on the main menu to the generated reports. See"Adding Links to Custom and Interactive Reporting Reports" on page 72.

If you add or modify a measure, scorecard or performance indicator, regenerate the Star Schema to view the changed information.

Note: To use custom performance indicators, you may need to reference them by configuring the `BQY` file.

➤ To view generated reports:

1 In Performance Scorecard, select **Reports**, and then **Custom Reports.**

2 Select the customized report that you added to your preferences. The name of the report is the name that you entered when generating the report.

Adding Links to Custom and Interactive Reporting Reports

You can generate and create links to default and custom Interactive Reporting reports from your application. To create and link to generic Interactive Reporting reports, see "Linking to Generic Performance Scorecard Reports" on page 74

➤ To create links to custom reports:

1. **In Performance Scorecard, select File, and then Scorecard Configuration.**
2. **Select Reports.**
3. **Click Add Report.**

   The Report Setup is displayed.

4. **Under Select Report Type, select the type of report to generate:**
   - Scorecard. See “Scorecard Report ” on page 66.
   - Strategy Scorecard. See “Strategy Scorecard” on page 67.
   - Scorecard (Measure Trend). See “Scorecard with Measure Trends” on page 67.
   - Generic Reports. “Linking to Generic Performance Scorecard Reports” on page 74.

     The Report Setup for the selected report type is displayed.

5. **Under Name, enter a unique name for the Interactive Reporting or Interactive Reporting report.**

   This information is displayed:

   - **Server**—Name of the Interactive Reporting or Interactive Reporting server.
   - **Port**—Server port number.
   - **Location**—Path to the Interactive Reporting `BQY` or `OCE` file.

6. **Beside Scorecard Name, click Scorecard to select the scorecard to use to generate the report.**

   Note: If you need to generate a report for multiple scorecards, select the Generic report type.

7. **From Select Scorecard Type, select the type of scorecard, such as Strategy, for the report.**
8. **From the box that is displayed, select the scorecard as follows:**
   - For **Employees**, click **Search**, and then select the employee name.
   - For **Accountability** and **Strategy Elements**, expand the map on which the element is used to select the element.

   The scorecard name is displayed under the Value column.

9. **Beside Date, click the calendar button, , to select the date for which to generate the report.**

   The dates available differs by scorecard type.

   - Scorecard Report has one
   - Strategy Scorecard Report has two
   - Scorecard (Measure Trend) Report has six dates

10. **Click Save.**

    The name and URL for the new reports are in the list of external reports on the Report Setup tab.

11. **Optional: Select Launch in New Window to display the report in a separate browser window.**

12 Click **Save.**

13 **Optional:** Add the link.

a. Navigate to `ReportTypes.xml` to add the report name and type.

b. Locate this section of text:

```
<ReportType name="Test" type="IR" sortOrder="4" port="19000"
server="localhost" location="workspace/browse/get/HPSWebReorts/
Test.bqy"
```

c. Add the new report type and name to the list before the final */ReportType* tag, in this format:

```
<parameter name="(report name)" type="(type)" sortOrder"(Sequence of Display on Report List)" required="(True or False)"/>
```

Note: To use a special character such as an apostrophe, enter a backslash (\), before the character. For example, LastQuarter\'s Financial Report.

The report displays in the**Custom Reports** folder on the Browser View.

Linking to Generic Performance Scorecard Reports

You can create generic reports in Performance Scorecard that have different requirements than the default reports. For example, create generic reports to reflect multiple measures and queries. Links to the generic reports can be added, and if the reports are commonly used by other individuals, you can also add the report link to the Custom Reports option on the main menu.

➤ To create links to generic reports:

1 Select **File**, then **Scorecard Configuration.**

2 Select **Reports.**

3 Click **Add Report.**

The Report Setup is displayed.

4 Under **Select Report Type**, select **Generic.**

The Generic Report Setup is displayed.

5 Under **Name**, enter a unique name for the Interactive Reporting or Business Intelligence report.

6 If you are creating a Business Intelligence report, select **BI.** If you are creating an Oracle's Hyperion® Interactive Reporting report, select **IR.**

The name and port number of the Interactive Reports sever is displayed, and the location of the `BQY` and `OCE` files.

7 Under **Parameter**, then **Value**, enter these context-sensitive parameters and values:

- ScorecardName—Name of the selected scorecard

- MeasureName—Name of the selected measure
- Date—Date for which to generate the report in `ddMMyyyy` format
- DimensionName—Name of the selected dimension
- Query—To use a query, enter true. Otherwise enter false

8 **Optional:** Click **Add** to create an additional row for new parameters and values.

9 Click **Save.**

The name and URL for the new report are added to the list of external reports.

10 **Optional:** Select **Launch in New Window** to display the report in a new browser window when viewed.

11 Click **Save.**

9 Securing Applications and Monitoring Data

In This Chapter

Securing Applications

Performance Scorecard scripting enables extensive application customizations. However, this flexibility is a potential avenue of attack for those wishing to compromise the system. To ensure the security of your applications, Oracle strongly recommends that you disable scripting by removing `jython.jar` from `HPSWebReports\WEB-INF\lib`. Note the following:

- If you upgraded to this release, delete `jython.jar` after starting the application for the first time.
- To later upgrade another database, restore `jython.jar` before the upgrade, and delete it after starting the application for the first time.

Monitoring Data and User Activity

This topic describes how to identify changes to business objects, how to unlock business objects, and how to access information about user activity. See:

- "Using the Locked Business Objects Report" on page 77
- "Using the Audit Report" on page 78
- "About the User Session Report" on page 79
- "Generating User Session Reports" on page 79

Using the Locked Business Objects Report

Use the Locked Business Objects report to break any lock applied to a business object. Business objects become locked when a user is modifying them or when a user forgets to log off.

Note: Do not unlock objects being modified by users.

➤ To unlock business objects:

1 Select **Administration**, and then **Locked Business Objects Report.**

The Locked Business Object Report is displayed, listing objects that are in use or locked.

2 Beside the business object to be unlocked, click **Break.**

Users can now edit the business object.

Using the Audit Report

All modifications made to application business objects are flagged in the Audit Report. Use this report to determine what applications business objects were modified, when the changes were made, and by whom.

➤ To open the Audit Report:

1 Select **Administration**, then **Audit Report.**

The Audit Report is displayed.

You can perform queries using this criteria:

- Name or ID of the business object that were modified
- ID of the user who made changes
- Date on which changes were made

2 Select a query type:

- object name — Returns data for an object whose name you enter.
- user — Returns information about application business objects accessed or modified by the selected user ID.
- object ID — Returns data about how the selected business object was accessed or modified.
- date range — Returns all changes made to an application during a selected period of time. Click the calendar button, , to select a start and end date for the range.

3 Click **Execute Query.**

The Audit Report provides these query results:

- Date and time a business object was accessed or modified
- Login ID of the user who accessed or modified a business object
- The action taken on a business object (for example, created)
- Name of the business object accessed or modified
- Class name of the business object that was modified (for example, Measure)

  This information enables you to inspect the database tables directly. The class name is also useful because two different business objects may have the same name and the class name enables you to distinguish them.

- The ID of the business object that was accessed or modified.

  This is a unique, system generated name that is automatically applied to each business object.

4 **Optional:** To permanently compact records before a date, click **Compact Audit Trails**, then click the calendar button, , and select the date.

About the User Session Report

The User Session Report enables you to access data about current and previous user sessions. Perform queries to display information by a user ID or date range. The report provides this information:

- Process— Server name and cluster ID of the application.
- User—ID of the user account that owns the session
- Name—Full name of the associated employee. If the user account does not have an associated employee, this column is blank.
- Email—E-mail address of the associated employee.
- Login—Time that the user account logged on.
- Logout—Time that the session ended, by logout or time-out. If the session timed out, an icon is displayed to the right of the timestamp.

Use the **Actions** link to access the Audit Trail report, which displays all actions for the day of the session's log in time for the associated user.

Generating User Session Reports

➤ To generate User Session Reports:

1 Select **Administration**, and then **User Session Report.**

The User Session Report is displayed.

2 **Optional:** Under **Query Clauses**, select one, or multiple, query types:

- To only include activity for one user, select **User ID** and enter the user ID.
- To only include activity from a particular period of time, select **Within Date Range**, click the Calendar button, , and select the date range.
- To only include activity for active sessions, select **Currently Active Sessions Only**.

Note: A session may remain active if it was not terminated by logout or time-out when the server was restarted.

3 Click **Execute.**

The report is generated, and results are displayed in the table at the bottom of the page.

4 Click **Action** to open the Audit Report that indicates when business objects were modified.

5 **Optional:** To permanently remove all user session records before a specific date, select **Truncate User Session Table**, then click the calendar button, , and select the date.

A

Using Performance Scorecard For Accessibility

In This Appendix

This appendix describes how to enable Performance Scorecard for accessibility and use the accessibility features.

Note: f you are using JAWS® Screen Reading Software, we recommend using Internet Explorer.

Before You Begin

Before using Performance Scorecard, for accessibilities perform these tasks:

- Ensure that you performed all configuration steps identified in the Dependencies section of the *Readme*. Also review the Known Issues section so that you can resolve any known accessibility difficulties that you may encounter.
- Refer to the EPM Workspace Accessibility Appendix and readme to configure Workspace for accessibility.

Configuring EPM Workspace for Accessibility

Enable EPM Workspace, in whichPerformance Scorecard. is a module, for accessibility as described in the EPM Workspace Accessibility Appendix. This includes enabling a screen reader and a high contrast theme on the Preferences page (select**File**, and then **Preferences**.

About Performance Scorecard

Performance Scorecard, a module that you use in EPM Workspace, contains two panes:

- A left View pane which contains the two view tabs that provide links to the data that you can create or access.
- A right Content pane which displays data based on the selections you make on the view tabs, from the menu bar, or from the Performance Scorecard tool bar.

Performance Scorecard includes these areas and tools:

1. Browser View that provides links to the data you can access, reports, and alerts. This view also contains a search that you can use to find data only within Performance Scorecard.
2. The Object View that displays the kinds of objects that you create to build applications such as employees, measures, maps, and scorecards.
3. Domain and Status Filters on the toolbar that enable you to restrict the data displayed by domain and performance level.
4. Report Date list on the toolbar that enables you to select the date for data show on reports.
5. Report Target on the toolbar that contains all available targets defined. This list enables you to select the default target used for computing scores and status symbols. The target selected is called the report target.
6. Look up filter that enables you to find data only within the Performance Scorecard module. Data displays in the Browser View. For example, entering a measure name and clicking the Lookup icon, will display just that measure on the Browser view tab.

Using Global Shortcut Keys in Workspace and Performance Scorecard

The focus behavior for the following keyboard navigation shortcuts depends on if you have enabled a screen-reader. If you have not, navigating to the view or content pane using the global keys will focus on the first focusable element. If you enabled a screen-reader and open a page by selecting or double-clicking an item on the object or browse view, focus goes to the iframe surrounding the content, which is read, confirming that you navigated to the right pane. To focus on content, press Ctrl+Y and then Ctrl-F6 or the combination for which the screen reader prompts you.

The following are shortcut keys in Performance Scorecard:

- F10 — Select and activate the first menu button in EPM Workspace
- Ctlr+1 — Select the Browser view
- Ctrl+2 — Select the Object view
- Ctrl+0 — Focus on the currently selected view pane
- Ctrl+G — Focus on the bottom tab bar of EPM Workspace that lists open modules.
- Ctrl+F — Focus the global Search field in EPM Workspace
- Ctrl+T — Focus on the Oracle Enterprise Performance Management Workspace, Fusion Edition toolbar.
- Ctrl+Y — Focus the first focusable element in the content pane.

Using Buttons

Activate buttons that have focus by pressing enter or the spacebar. Some buttons have a mnemonic shortcut designated by an underlined letter. To use the mnemonic shortcut use the key combination for your browser. If you use Internet Explorer, press Alt+ the underlined letter. If you use Firefox, press Alt+Shift+ the underlined letter.

Using Trees

Trees are used on the browser view and object view to organize business objects, and on reports such as measure performance report, employee profiles, and scorecard details. Navigate trees using the following keys:

- Up/Down arrows— Navigate a hierarchy of business objects on the object or browser view tab.
- Numeric keys 1 to 9 — Expands or collapses dimensional measures. Dimensions are counted left to right. If focused on a dimensional measure, pressing 1 expands and collapses the first dimension. Pressing 2 expands the second dimension and so forth.
- Left/Right arrows— Move focus left or right. For example, if you are focussed on a scorecard, pressing the right arrow focuses on the expand/collapse icon, the status symbol and then the scorecard name. In a tree-table (i.e.a multi-column report) these keys move the selection from column to column.
- Shift + left or right arrows — If you selected a column heading, press Shift+left arrow the column will be expanded by 1 pixel. If you have a column heading selected and press Shift + Right arrow the column will be reduced in size by 1 pixel

- Grey plus key (+) and Grey minus key (-) — Expand or collapse tree nodes that have children
- Enter — Normally the equivalent of a mouse click on a focused element, the enter key acts as follows:
  - If focussed on the expand \ collapse icon for a folder or tree node, enter opens or collapses the folder or hierarchy
  - If focussed on an object name, enter opens the object in the content pane.
  - If focussed on a column header, enter sorts the table by the column contents

Using the Performance Scorecard Search

To access the search feature of the browser view, focus on the browser view and then press Ctrl-Tab. Press Ctrl-Tab again to move focus back to the browser view tree.

Using the Performance Scorecard Toolbar

- Activate the toolbar by pressing Ctrl+T
- Navigate buttons by pressing Tab
- Open and close drop down lists using the up and down arrow keys

Using Date Selectors

- Once focussed on the calendar on the toolbar, press space or enter to use the date selector
- Navigate dates using the tab and arrow keys
- Select dates by pressing the space bar

Using Context Menus

- Activate a context menu by pressing the Context key that is located at the bottom right of most keyboards between the Ctrl and Windows keys
- Navigate options using the arrow keys
- Activate the selected option by pressing Enter

Using Combination Boxes

To navigate combo boxes, such as those for Report Type and Range Selection, press Enter and navigate selections using the arrow keys. If control does not go to all subsequent selections, press Alt+ down arrow to activate the selection list, and then use the up and down arrow keys to select options.

Using Tables on Reports and Setup Pages

The tables on most pages and reports with one or two tabs such Results Collection can be navigated using Tab and standard controls. Navigate complex reports such as Scorecard Details and Measure using the arrow keys and other keys described in “Using Trees”. Screen-readers cannot read the information on the chart tabs. Use the Trending Tab instead, which contains the same information in tabular form.

Using Skip To Content Links

Tabbed pages and reports such as the Scorecard Details report contain a Skip to Content link that is the first element. Activating this link will move focus to the first focusable element following the tabs.

Using Multiple Panels

Some pages, such as those for creating or viewing annotations and initiatives contains multiple panels. Press Ctrl-Tab and Ctrl-Shift-Tab to switch focus between panels.

Using Maps and Map Elements

he strategy tree and accountability map are not fully keyboard accessible, and do not support screen-readers. The information contained in these maps can be viewed in tree form in the browser view instead. To create and edit the information in these pages, use the following Import/Export utility behaviors.

- amap or smap— Create, delete, or rename a map
- sme — Create, remove, or rename a strategy element. You can also use this behavior to add strategy elements to a domain and move elements to change the hierarchy.
- ame — Create, remove, or rename an accountability element. You can also use this behavior to add accountability elements to a domain and move elements to change the hierarchy.
- scd — Apply a scorecard template to a map element
- LinkElement — Link maps by connecting two elements. To do so, use the behavior and specify the name of the element on another map to which to connect the current map element.

For more information about using the Import/Export utility, see appendix A of the *Oracle Hyperion Performance Scorecard Administrator's Guide*.

Using Applets

When using applets which contain their own menu bar, the menu mnemonic keys are intercepted by the applet, and you cannot activate the main menu by using them (e.g. Alt-F will open the applet's file menu, instead of the main file menu). To activate the main menu, even when focussed on an applet, press F10. Access the menu bar for the following items using the mnemonic keys.

- Strategy tree builder
- Cause and Effect map builder
- Accountability map builder

Using the Cause and Effect Map Applet

Press Ctrl+Tab to navigate the following areas:

- Menu bar and title bar. Navigate using the Tab key
- Strategy map list and strategy element selection area to the right: Use Tab to navigate controls. Use the up and down arrow keys to select the elements that you want to use that are also on a strategy map, and then press the space bar to add them to the map builder
- Map builder: Press Tab to navigate strategy element boxes. You can perform the following tasks when focussed on a box:
  - Invoke the color selector to change the color of the box using the context menu key.
  - Remove the box from the map using the Delete key
  - Move the box one pixel up, down, right, or left using the arrow keys
  - Move the box ten pixels up, down, right, or left using Ctrl+ arrow keys
  - Resize the box from the lower right corner using Shift+Array keys. Press the right arrow and down arrow to enlarge the box. Press the left arrow and up arrow to reduce the box size.
  - Snap and fix a strategy element in its placeholder on a map using the space key.

Using the Dimension Setup Applet

When launched, focus is on the Dimensions tree that you will customize to later generate dimensional measures. Use the keys described in "Using Trees" to work with the dimensions. Press the Properties key (to the left of the Alt button on most keyboards) to activate the context menu that enables you to create a dimensional hierarchy as follows:

- Move Up: Moves the selected dimension member up
- Move Down: Moves the selected dimension member down
- Ctrl Up: Moves the selected dimension member up to be the child of another dimension
- Ctrl Down: Moves the selected dimension member down to the child of another dimension

Press Ctrl+Tab to move focus from the dimensions tree to the details pane that provides information about selected dimensions. Press Ctrl +Tab again to move from the description field to the Save button.

Using the Range Editor

Navigate the controls using Tab. When you select a list box, the first item is given focus. Activate the Edit and Delete buttons to modify or delete the selected item. If you create or modify a range, use Tab to navigate the Add or Edit Dialog that is invoked.

Using the Formula Editor

When you launch the editor, focus is on the formula entry area is focused in which you can define formulas using standard editing keys. To navigate to the Functions pane to the right that enables you to insert a variety of functions or Performance Scorecard data, press Ctrl-Tab. By default, the Functions folder has focus. Use the up and down arrow keys to select the function to use. Press Ctrl-Tab again to focus on the first button in the Operation pane in the lower left..

Using the Scorecard Setup Page

By default, focus is on the first active element, which is usually the Use Perspective Weights checkbox. Navigate controls using Tab. Navigate the table that identifies the measures and lower level scorecards used to create the scorecard using the arrow keys. Focus on the Weight cell to enter weights for each measure or scorecard used on the scorecard that you are building. To select measures, navigate the tree on the Add Measures dialog using the keys described in "Using Trees". To expand a dimensional measure, use the right and left arrow keys to select dimension members. Press the space bar to expand or collapse the dimension. To select lower level scorecards for use on the scorecard, navigate the tree on the Add Scorecards dialog using the keys identified in "Using Trees". Navigate the controls using Tab.

Using Online Help

To launch page specific help, press Alt+H and then the accelerator T. Close the help topic by pressing Alt+F4. To launch the cross-product help system that provides help for all product modules that you can open in Oracle Hyperion Enterprise Performance Management System, press Alt+H and select the second menu option.

B Customizing Performance Scorecard and the Alerter

In This Appendix

Customizing Performance Scorecard

This section describes how to modify `HPSConfig.properties` to customize aspects of Performance Scorecard.

Performance Scorecard now uses common aspect logging. To use the previous style of logging, see "Using Category-Based Logging" on page 91.

➤ To customize Performance Scorecard:

1. From *application server*\webappsconf\config, open `HPSConfig.properties` in any text editor.
2. You can change these entries:

Table 12 HPSConfig.properties

Entry	Description
`log4j.appender.ROOT_Appender.layout.filters=sun,org,java,javax,com`	Comment out this line to display the stack trace that provides detailed information about errors in the LOG file. The stack will include the exception name, exception message, the related class name, method, file name, and line number. For example: `at com.hyperion.pmd.hps.system.debug.Assert.assertion(Assert.java:78)at com.hyperion.pmd.hps.system.debug.Assert.assertion(Assert.java:71) at com.hyperion.pmd.hps.model.BusinessObjectImpl.getOneToOneAssociatedBusinessObject(BusinessObjectImpl.java:1100`
`hyperion.hps.audit_trail.is_required`	Set this to false if you want do not want to save extra auditing information in the data store. **Caution!** If set to false, the Alerter and support for deployment in a clustered environment will not work, and will not be able to use promotion.

Entry	Description
`hyperion.hps.prefetch`	False—Fetch only page-specific objects This will improve application startup time but may decrease speed. True—Pre-fetch all objects. This results in slower application startup time, but better performance. Disables the Performance Scorecard Adapter. **Note:** To selectively turn off pre-fetching by object type, contact Oracle Support.

`hyperion.hps.user_ account_ automatic_id_ computer_class`	A customer user-id generation algorithm can be implemented as a java class and then its full-package-name specified for this parameter.
	This java class must conform to the com.hyperion.pmd.hps.model.authorization. UserIDFromEmployeeComputerInterface interface (see below) and be available on the classpath.
	`public interface UserIDFromEmployeeComputerInterface {`
	`/**`
	`@param emp Employee business object to base the construction of the user ID upon.`
	`@return The user ID that should correspond to the given employee.`
	`public String computeUserID(Employee emp);`

`hyperion.hps.notes.home`	This entry contains the absolute directory path to a directory in which the notes subsystem to keep temporary files.
`hyperion.hps.notes. minimum_db_ connections`	Using an integer greater than 0, this entry states the minimum number of database connections open for the notes subsystem database connection pool. We recommend that you have at least one connection.
`hyperion.hps.notes. maximum_db_ connections`	Using an integer greater than 0, this entry contains the maximum number of database connections that can be opened for the notes subsystem database connection pool. We recommend that you have at least four connections available. Modify this entry to increase the speed of notes-related functions such as fetching.
`hyperion.hps.password_ constraint`	Modify this entry to customize the syntax of passwords using regular expressions. After changing this entry, modify webreports.password_change.password_ not_match_ constraint in the ApplicationResources_*.properties file so the warning message reflects the constraint.
`hyperion.hps. objectAttachmentsFolder`	Provides the directory containing uploaded attachments.
`hyperion.hps.formula. value-caching_limits`	Modify this entry to increase caching limits for formula computations.
`hyperion.hps.datapoint. cached_result_limit`	Sets the maximum number of result values fetched from the database that will be cached in memory.
`hyperion.hps.datapoint. cached_target_limit`	Sets the maximum number of target values fetched from the database that will be cached in memory.
`hyperion.hps.host_name`	To deploy your application on a different computer, specify the name of the new computer after “hps.” For example: *Organization*.hps.*computer*.

Entry	Description
`hyperion.hps.main_data_ store.driver_class_name`	Provides the Java driver class name from the data store vendor used to access the application database. For example: `hyperion.jdbc.sqlserver.SQLServer Driver` Modify this entry if you changed database types.
`hyperion.hps.main_data_ store.user_name`	This value is encrypted and cannot be manually changed. Provides the user name or account that connects to the data store (application database).
`hyperion.hps.main_data_ store.password`	This value is encrypted and cannot be manually changed. Contains the password for the account used to log into the database.
`hyperion.hps. authentication_service. logon_params`	Contains the log on input fields used to authenticate users. These input field names are separated with blank spaces. Possible input field names are: ● {user_name, password, domain} ● For basic authentication: user_name password ● For NTLM authentication: user_name password domain
`hyperion.hps.data_ watcher_ service.change_ check_ interval_seconds`	For users in a clustered environment: Modify the default value of 150 to increase or decrease the amount of time that elapses before changes made to one instance of an application are reflected in all applications. The number you specify instead of 150 is the maximum number of seconds that elapse before the application database shared by multiple applications in a clustered environment is refreshed so changes to one application are reflected in all others.
`hyperion.hps.request_ blocker.class_name`	This class is set automatically during installation to block all requests during a Oracle's Hyperion® Application Link load or promotion. During installation, you select the deployment environment: ● Non-clustered (single process), or ● Clustered (multiprocess) The Request Blocker class name is automatically set to the appropriate value: ● `com.hyperion.pmd.hps.SingleProcessRequest Blocker` ● `com.hyperion.pmd.hps.MultiProcessRequest Blocker` This value should not be modified unless instructed by Support.
`hyperion.hps.object_id_ generator.block_size`	Modify this entry to increase the block size of the object ID generator. that reserves a block of IDs in a pool (in the amount set by this entry) and generates the next ID from the pool. Because IDs that are reserved but not yet used will not be allocated to any object after rebooting the server, an unnecessarily high value will waste too much IDs if the server is often restarted.

3 **Save the file.**

Using Category-Based Logging

Performance Scorecard uses aspect-based logging. To use the old method of logging perform these steps:

1. Open `HPSConfig.properties` in any text editor.
2. Scroll to the `Miscellaneous` section.
3. Change`hyperion.hps.logging.mode=aspect` to `hyperion.hps.logging.mode=category`.
4. Scroll to the `HPS Log Categories` section and uncomment (delete the # sign) at the beginning of the appropriate lines of code.
5. Save and close the file.

Customizing the Alerter

This section describes how to modify the form of delivery the Alerter uses to send alert notifications. However, this requires java programming skills and the creation of new java classes. To perform these tasks, contact Oracle Support for assistance:

- Change the alert notification delivery form by modifying `at.hyperion.hps.alerter.delivery.class_name`
- Remove or add custom options used on alert notification message by modifying `hyperion.hps.alerter.message_decorator`

C

Common Member Attributes

In This Appendix

Overview

This section identifies the different names for attributes used in Shared Services, Performance Scorecard and other products.

Entity Member

Table 13 Entity Member Attributes

Shared Services	Oracle Hyperion Planning, Fusion Edition	Performance Scorecard
Currency	BaseCurrency	CurrencyCode

Year Member

Table 14 Year Member Attributes

Shared Services	Planning	Performance Scorecard
Name	Name	Name

Measure Model

Table 15 Measure Model Attributes

Shared Services	Planning	Performance Scorecard
Unit	NA	Unit
IsTemplate	NA	IsTemplate

Variable Model

Table 16 Variable Model Attributes

Shared Services	Planning	Performance Scorecard
Unit	NA	Unit

Employee Model

Table 17 Employee Model Attributes

Shared Services	Planning	Performance Scorecard
FirstName	NA	FirstName
LastName	NA	LastName
UserId	NA	UserId

Accountability Element or Strategy Element Model

Table 18 Accountability Element Model Attributes

Shared Services	Planning	Performance Scorecard
MapName	NA	Unit

Unit Model

Table 19 Unit Model Attributes

Shared Services	Oracle Hyperion Planning, Fusion Edition	Performance Scorecard
ScalingFactor	NA	ScalingFactor

D Importing and Exporting Data Using the Import/Export Facility

In This Appendix

Overview

The Import/Export Facility is a standalone application that writes directly to the Performance Scorecard database. It enables you to share data between Performance Scorecard and comma-separated value (`CSV`) text files by performing these tasks:

- Exporting data from aPerformance Scorecard application to a `CSV` file
- Importing data from a `CSV` file to Performance Scorecard applications

You can combine these operations to extract data from Performance Scorecard, modify them, then re-import the modified data in one operation using a scheduling program. You can also use Microsoft Excel spreadsheets to create a data file which can update, add, or delete data in Performance Scorecard, or export existing data from Performance Scorecard for use in another environment. This enables you to extract all computed values such as targets, results, scores and status and trend information.

Imported is added to applications after 150 seconds. You need not restart the application server. Invoke the facility from the command line using an import or export command. Each command uses the same line syntax. Specify the behavior to use and a data file in the command. The behavior defines the type of data to import or export. The data file is the name of the file that contains or will contain the data.

Install the Import/Export facility with Performance Scorecard as described in the *Oracle Hyperion Enterprise Performance Management Installation and Configuration Guide*.

About CSV Files

The `CVS` file uses Microsoft Excel formatting conventions and must contain a header row that defines the columns used and the order in which they are displayed. Although most columns are optional, the Name and Action columns are mandatory. Each row, other than the header row, defines a record to be input.

You can place columns in any order. When importing, the facility recognizes the name of the column in the header. When exporting, all possible columns for the behavior are exported. Use a query file to specify the columns to export, and the export order. See "Using Queries" on page 103.

See:

- "Action" on page 96
- "Name and Key Columns" on page 96
- "Data Rows" on page 96

Action

The Action column, that is always required, contains a letter value representing the task to perform, such as "C" for creating objects. You can specify the following letters values:

- V—View a record. When importing the record is ignored.
- C—Create an object
- U—Update all fields for the object specified by the name or key. Any previous values are overwritten.
- D—Delete the record specified by the name of key.

Because records that view are ignored on import, it is faster to export all the data, and then modify the records to be changed. Change the action values of the records "U" or "D," and then import the entire file. The "V" records are ignored, and only those records set to "U" or "D" have any effect.

Name and Key Columns

The Name column identifies the object to update or delete by ID. Employees are identified by their E-mail. If multiple objects have the same name, the primary key of the object can be used as the identifier in the key column. If present, the key column takes precedence over the name column.

Note: Case sensitivity is not used to match names. Any leading or trailing spaces are stripped before matching.

Data Rows

A data row must contain a column for every header column, in the same order. These data types may be in one column:

- String—Can contain any alphanumeric characters
- Integer—Can contain numbers, plus (+), or minus (-) signs.
- Decimal—Number that is formatted as defined in the configuration file.

- Date—Date that is formatted as defined in the configuration file.
- 0–1 (type)—Values that represent a relationship to one other object. The value in brackets is the type or list of types supported. For example, 0–1 (Employee). The object may be specified by name, or primary key. If it is a primary key, enclose the value in ${}. For example ${32f.-1.-f419e0}.
- 1–1 (type)—Values that represent a mandatory relationship to one other object. The value shown in brackets is the type or list of types supported. For example, 0–1 (Employee). The object may be specified by name, or primary key. If it is a primary key, enclose the value in ${}. For example ${32f.-1.-f419e0}.
- 0–*n* (*type*)—Represent a relationship to one or more objects. The value shown in brackets is the type or list of types supported. For example, 0–*n* (Employee).
- Constant—Predefined constant value must be used. The name, but not case, of the constant must match .

Follow the `CVS` file formatting rules. If you use Excel or other software to generate the file, this is done automatically. If you use a text editor, follow the formatting rules to avoid errors processing the data. For example, if the data in a column contains a comma, the column must be enclosed in quotes. Refer to documentation on standard CSV format for detailed rules.

About Behaviors

Behaviors identify objects, such as scorecards or measures, to be imported or exported. Note the following:

- Metadata about the objects to import or export is presented in rows and columns.
- For each behavior, a unique set of columns (metadata categories) is available.
- The Action column is always available and required.
- For all but the Employee behavior, the value in the Name column indicates the type of object to import or export.
- Each behavior can identify multiple objects, one object per row (per record).

You can use these short behavior names to import or export data from command line prompts:

- ame—For accountability map elements
- amap—For accountability maps
- dim—For custom dimensions
- dm—For custom dimension members
- emp—For employee records
- ini—For initiatives
- msr—For measures
- mn —To attach a named range to a measure, or export a named range attached to a measure
- mfc—Measure templates

- mfnr—To attach a named range to a measure template, or export a named range attached to a template
- mdata—For results, scores, and targets
- mtf—For formulas that computer measure targets
- scd—For scorecards
- sce—For scorecard components
- smap—For Strategy maps
- sme—For strategy elements
- tar—For targets, but not target values
- uni—For units that quantify measure data
- var—For variables
- vsr—For variable results

See “Behaviors” on page 105.

About the Configuration File

The `Config.properties` files defines the database connection required to import and export data. By default, the file is in: `C:\HYPERION_HOME\hps\9.5\tools\config\config.properties`

Although you can override default settings from a command line, make permanent changes in the file. For example, if your data uses a different date format, modify that setting in the file. The following table lists the entries that you can change. For information about the formats and symbols that you can use in the file, see “Formats and Symbols” on page 99.

Table 20 Config.properties Entries

Entry	Description
hpsconfig	Location of a Performance Scorecard configuration file, such as `HPSConfig.properties`
dateFormat	Format for parsing or formatting dates. See Table 21 on page 99.
numberFormat	Format for decimal numbers
codePage	Code page of the data file. A query file, if any, must be in this code page.
errorLog	Location of the error details log
failedRecordsLog	Location of the log file that records failed events
successfulRecordsLog	Location of the log that records successful record events
outputFile	Location of the file in which failed import records are written
queryFile	On export, location of the file specifying the records to be extracted.

Entry	Description
mappingFile	Location of the mapping file that defines the mapping between record fields and application object attributes
username	Username to authenticate when connecting to the repository
password	Password to authenticate with when connecting to the repository
domain	Only for NTLM authentication
nolock	Permits objects that are being edited to be updated or removed
locale	Locale to use that also impacts the default number and date format, and the language used in help messages and event log entries
rowTransactions	Set to false to treat the entire import as one transaction. Any error will cause the entire job to fail
module.driver	Class of the driver module
module.parser	Class of the Parser module
module.resolver	Class of the resolver module
module.repository_manager	Class of the repository module

Formats and Symbols

The following tables identify the date formats and symbols that you can use in the `config.properties` file:

Table 21 Date Formats in Config.properties

Format	Component	Presentation	Example
G	Era designator	Text	AD
y	Year	Year	2006 or 06
M	Month in year	Month	July or 07
w	Week in year	Number	27
W	Week in month	Number	2
D	Day in year	Number	189
d	Day in month	Number	10
F	Day of week in month	Number	2
E	Day in week	Text	Tuesday; Tue
a	AM/PM marker	Text	PM
H	Hour in day (0–23)	Number	0

Format	Component	Presentation	Example
k	Hour in day (1–24)	Number	24
K	Hour in AM or PM (0–11)	Number	0
h	Hour in Am or PM (1–12)	Number	12
m	Minute in hour	Number	30
s	Second in minute	Number	55
S	Millisecond	Number	978
z	Time zone	General Time Zone	Pacific Standard Time, or PST, or GMT-08:00
Z	Time zone	RFC 822 time zone	-0800

Table 22 Symbols in Config.properties

Symbol	Location	Localized	Description
0	Number	Yes	Digit
#	Number	Yes	Digit, Zero shown as blank
.	Number	Yes	Decimal separator or monetary decimal separator
–	Number	Yes	Minus sign
,	Number	Yes	Grouping separator
E	Number	Yes	Separator between mantissa and exponent in scientific notation. This does not need to be quoted in prefix or suffix.
;	Subpattern boundary	Yes	Separator between positive and negative subpatterns.
%	Prefix or Suffix	Yes	Multiply by 100 and show as percentage.
\u2030	Prefix or Suffix	Yes	Multiply by 1000 and show as per mille.
¤ (\u00A4)	Prefix or Suffix	No	Currency sign, replaced by currency symbol. If doubled, replaced by the international currency symbol. If used in a pattern, the monetary decimal separator is used instead of the decimal separator.
'	Prefix or Suffix	No	Encloses special characters in a prefix or suffix, for example, "'#'#" formats 123 to "#123". To create a single quotation mark, use two in a row: "# o''clock".

Sample Configuration File

```
hpsconfig=config\\HPSConfig.properties dateFormat=dd/MMM/yyyy numberFormat=#.##
codePage=unicode errorLog=log\\error.log failedRecordsLog=log\\failedRecords.log
successfulRecordsLog=log\\successfulRecords.log #outputFile= #queryFile=data\\query.csv
```

```
mappingFile=config\\EtlMapping.xml username=designer password=password domain=
nolock=false locale=en rowTransactions=true   # Stretch to support whole file as 1
transaction, for performance  # Module definitions
module.driver=com.hyperion.pmd.hps.etl.parser.CSVDriver
module.parser=com.hyperion.pmd.hps.etl.parser.ParserModule
module.resolver=com.hyperion.pmd.hps.etl.handler.ScorecardResolverModule
module.repository_manager=com.hyperion.pmd.hps.etl.handler.ScorecardRepositoryManagerMod
ule
```

Logging Errors

These files record the progress of data transfer and display errors:

- `errors.log`—Describes errors. You can configure this file to display warning and debug messages.
- `failedRecords.log`—Contains an entry for each record that fails to load, the record number, and if possible, the name of the object the record represents.
- `successfulRecords.log`—Contains an entry for each loaded record. Because it will be large, modify the configuration file to generate this file.

Optional Command Line Arguments

In addition to providing the parameters required for the import or export commands, you can append commands with these optional commands:

Table 23 Optional Command Line Arguments

Command	Description
–c *configfile*	Path to the configuration file
–l *logfile*	Path to the log file that records unexpected errors
-e *failedRecordsLogs*	Path to the log file for failed records and describes events that prevented records from being read or written Default file is `failedRecords.log`
–i *successfulRecordsLog*	Path to the log file for all successful records .By default, this log is not written due to size. If required, you can set this log in the configuration file
–o *outputfile*	For import—Path to the output file where error records are written
–q *queryfile*	For export—File containing the query information to determine which records to export. If blank, all records are exported
–m *mapping*	Path to the mapping file, that defines the format of the expected CSV file. The mapping file only requires information about one behavior, so is useful if your input files are in a slightly different but compatible format The configuration file points to the mapping file, but may be overridden by this option.
–d *date format*	Date format. This setting overrides the format defined in the configuration file
–n *number format*	Number format. This setting overrides the format defined in the configuration file
–cp *codepage*	Code page to use when reading or writing the CSV file. This option overrides the configuration file setting

Command	Description
–u *username*	The Performance Scorecard user name. This option overrides the configuration file setting
–p *password*	The Performance Scorecard password to log on to the application. This option overrides the configuration file setting
–domain *domain*	NTLM domain
–nolock	Do not try to obtain business object locks before updating or deleting **Caution!** Do not use this option there are other current users
–v *config file option*	Defines a configuration file or custom option. For example: –v rowTransactions=false is the same as setting rowTransactions=false in the configuration file.

Importing and Exporting Data

This topic describes how to import and export data using CVS files. It also explains how to use queries to specify data to export.

Importing Data

You can import data from an external data source and load it into Performance Scorecard using a comma-separated value (CSV) text file.

➤ To import data:

1. **In Microsoft Excel, or another application, create the `CSV` file that contains the data to import.**
2. **Ensure that the file uses the appropriate formats. See "About CSV Files" on page 95.**
3. **Open a command window and change to the directory that contains the import and export commands. By default these commands are in:`hps\9.5.0.0\tools\bin`.**
4. **Enter the import command, using this format:**

   `import` *`behavior filename.csv`*

   For example, enter:

   `import emp employee.csv`

   See "Behaviors" on page 105.When the processing is complete, a message is displayed.
5. **Launch Performance Scorecard to verify the changes.**

Exporting Data

You can export data from Performance Scorecard applications to an external source using a comma-separated value (CSV) text file. You can export all data for an object type, such as all employees, or a limited amount of data.

➤ To export data:

1 **Open a command and change to the directory containing the import and export commands. By default this is:**`C:\Hyperion\hps\9.5.0.0\tools\bin`.

2 **Enter the export command, using this format:**

`export` *`behavior filename.csv`* `[options]`

For example:

`export emp employee.csv`

See "Behaviors" on page 105.

When the processing is complete, a message is displayed.

3 **In Microsoft Excel, or other application, open the file to view the export file.**

4 **Update, edit or delete data in the file.**

5 **Save the file.**

Using Queries

To limit the data extracted during an export, create a simple query of one of these types:

- Name/Key query
- Date query

A query file follows the same behavior you are exporting. Only columns specified in the header are extracted, in the order specified. Each row specifies a record to extract. To identify the objects to extract, specify names or keys. Wild cards are not supported, so you must specify one record, with the exact name, for each object to extract. For measures, specify a date.

➤ To run name\key queries:

1 **In Microsoft Excel, or another text application, create a CSV text file that contains the Name, Key or ID column of the object to be exported.**

2 **Optional: Add a new row for each additional Name in the query.**

Note: Wildcard characters are not supported in a query.

3 **Save the CSV file.**

4 **From the Windows main menu, select Start then Run.**

The Run dialog box is displayed.

5 **In Open, type** `cmd`**, then click OK.**

The Command window is displayed.

6 **On the command line, enter:** *`cdpath to Import.bat`*.

By default, the `.bat |.sh` files are in:`hps\9.5.0.0\Tools\bin`.

7 **Enter the import command, using this format:**

`export` *`behavior filename.csv`* `–q` *`query.csv`*.

When the processing is complete, a message is displayed.

8 In Excel, open the exported data file for viewing.

➤ To run date queries:

1 In Microsoft Excel, or another text application, create a `CSV` text file that contains the Action and Date for which you want data to be exported. For example, an action of “V” and a date of 01/01/2006.

2 **Optional:** Add a new row for each additional date in the query.

3 Save the file.

4 From Windows, select **Start**, then **Run**.

The Run dialog box is displayed.

5 In **Open**, type `cmd`, then click **OK**.

The Command window is displayed.

6 On the command line, enter `cd` *`path to Import.bat|.sh`*.

By default, the `.bat |.sh` file is in:`hps\9.5.0.0\Tools\bin`.

7 Enter the import command, using this format:

`import` *`behavior query.csv`* `[options]`

See “Behaviors” on page 105.

When the processing is complete, a message is displayed.

8 In Excel, open the `CSV` file to view the query file.

9 Save the file.

Exporting, Modifying, and Importing Data in One Session

CSV files enable you to export data from Performance Scorecard, modify or delete the data, and re-import it into Scorecard in one session.

➤ To perform a one—session transfer:

1 Open a command window and change to the directory that contains the import and export commands. By default, these commands are in `hps\9.5.0.0\tools\bin`.

2 Enter the export command, using this format:

`export` *`behavior filename.csv`* `[options]`

3 In Microsoft Excel, or other text application, open the CSV file to view the export file.

4 Edit the data in the CSV file to add, remove or modify any entries. For each row, set the action required to reflect the change:

- V—No change was made to extract the record, but ignore the row when re-importing data.

- **C**—You added a new object, as defined by the row.
- **U**—You modified data. Changes are picked up when re-importing data.
- **D**— Delete a record specified by name or key.

Caution! Do not leave columns blank.

5 **Change the name. If you are creating objects, remove the Key and ID columns.**

6 **Save the file.**

7 **In the Run dialog box in Open, type `cmd`, then click OK.**

The Command window is displayed.

8 **On the command line, enter:**`cd`*`path to Import.bat`*`.`

9 **Enter the import command, using this format:**

`export` *`behavior filename.csv`* `[options]`

See "Behaviors" on page 105.

Any changes, additions or deletions are re-imported into Performance Scorecard.

10 **Launch Performance Scorecard to verify the changes.**

Behaviors

For each behavior, you must use the appropriate file format to ensure the successful transfer of data. In the file formats for each behavior, "R." indicates required data and "K" identifies the object type.

AccountabilityElement

Use this behavior to import or export accountability elements used on Accountability maps.

Table 24 AccountabilityElement

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C, V, U, D	Constant	
K	Name	Element name	String	255
	Key	Primary key	String	
	ID	Object ID	Integer	
R	Map Name	Name of the map on which the element is used	1–1 (Accountability Map)	
R	Parent	Name of the parent element If blank, the element is on the root level of the map	0–1 (SME)	

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Order	Ordering of the element, relative to other map elements	Integer	
	Title	Element title This value overrides the default element name	String	255
	Owners	Name of employees who own the element	0– *n* (Employee)	
	Members	Name of employees who are members of the element	0– *n* (Employee)	
	Annotation Creators	Employees who are annotation creators for the element	0– *n* (Employee)	
	Strategy Elements	Name of strategy elements associated with this element	0–*n* (SME)	

AccountabilityMap

Use this behavior to import or export Accountability maps. The following columns are available, and only the Action column is required

- Action—Constant (C, V, U, or D)
- Name—Text string less than 255 characters that names the map
- Key—Text string that identifies the primary key
- ID—Integer that identifies the object ID
- Description—Text string of no more than 2000 characters
- Domains—Variable expression, `0 – n (domain)`

Dimension

Use this behavior to import or export custom dimensions. These columns are available but only the action column is required:

- Action—Constant (C, V, U, or D)
- Name—Text string less than 255 characters that specifies the unique dimension name
- Key—Text string that identifies the primary key
- ID—Integer that identifies the dimension ID
- Description—Text string less than 2000 characters
- Order—Integer that indicates the sequential position in dimension in the dimension list
- Alias—The alias for the selected custom dimension, if available. 0–*n* (Alias)
- System—Boolean. Enter TRUE if the dimension is associated with other objects such as employees and strategy elements. Otherwise enter FALSE
- External—Boolean. If the dimension is from an external data source, enter TRUE. Otherwise, leave as FALSE.

DimensionMember

Use this behavior to import or export dimensional members.

Table 25 DimensionMember

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C, V, U, D	Constant	
K	Name	Unique dimension member name	String	255
	Key	Primary key	String	
	ID	Object ID	Integer	
	Dimension		1–1 (Dimension)	
	Parent	Parent of the dimension member (required unless member is automatically created with the dimension).	1–1 (Dimension Member)	
	Description	Dimension to which this member belongs	String	2000
	Order	Position in the dimension list	Integer	
	Alias	Alias for the selected custom dimension member	0–*n* (Alias)	
	System	TRUE if the member is associated with other objects such as employees and strategy elements.	Boolean	
	External	TRUE if the member is from an external data source	Boolean	

Employee

Use this behavior to import or export employees.

Table 26 Employee Metadata

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C, V, U, D	Constant	
K	E-mail	E-mail address	String	
	Key	Primary key	String	
	ID	Object ID	Integer	
	First Name	The first name of the employee	String	255
	Last Name	The last name of the employee	String	255
	Employee Number	The internal employee record number	String	255
	Title	The job title for the employee	String	255

Required Fields and Key	Name	Description of Content	Type of Content	Size
	Department	The name of the department or business unit	String	255
	Manager	Name of the employee's manager	0–1 (Employee)	
	Domain	Name of the domain in which the employee works	0–*n* (Domain)	
	Business Address	Business address or office of the employee	String	255
	Home Address	Home address of the employee	String	255
	Home phone	Home telephone number for the employee	String	255
	Work phone	Business telephone number for the employee	String	255
	Cell phone	Cellular or mobile telephone number for the employee	String	255
	Userid	User Account ID associated with the employee	0–n (User Account)	

Initiative

Use this behavior to import or export initiatives.

Table 27 Initiative Metadata

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C, V	Constant	
K	Name	Initiative name	String	255
K	Link Name	Name of object to which the initiative is attached For import — The initiative is only associated with one owning object. For export — Access the initiative through any associated objects	String	255
K	Link Type	Type of object to which the initiative can be attached: ● Accountability Element ● Strategy Element ● Measure	Constant	
	Description	Purpose of the initiative	String	2000
	Cost	Cost to complete the initiative	Decimal	
	Priority	Level of importance	0–1 (*Initiative Priority*)	
	Completion Date	Date that the initiative is actually completed	Date	
	Cost Unit	Selected unit of the cost value, such as a currency	0–1 (Unit)	
	Effort	Effort required to complete the initiative, such as working hour		

Required Fields and Key	Name	Description of Content	Type of Content	Size
	Notify	Employee to be notified about the state of the initiative	0–*n*(Employees)	
	Owners	Employees who are responsible for the initiative	0–*n* (Employees)	
	Start Date	Date on which the initiative begins	Date	
	Due Date	Date by which the initiative should be completed	Date	
	Status (Name)	Level of progress in text.	String	
	Status (Symbol)	Level of progress as a status symbol	Status (Name)	
	Percent Complete	Current percent complete	Decimal	

Measure

Use this behavior to import or export measures.

Table 28 Measure Metadata

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C, V, U, D	Constant	
K	Name	Measure name. For dimensional measures use the template name.	String	255
K	Short name	Abbreviated name that you can use in reports..	String	255
	Key	Primary key	String	
	ID	Object ID	Integer	
	Description	Purpose of the measure	String	2000
	Dimension Members	List of relationships to dimension members If blank, the measure is treated as a non-dimensional measure. If the measure is a template, the measure is automatically linked to that template, and the set of specified dimensions. **Note:** Create all dimensional measures first with a single file, then perform overrides, if any, using a second file. **Caution!** If you do combine them into a single file, specify `${ignore}` for any columns for which to not override value for the dimensional measure.	0–*n* (Dimension Members)	
	Unit	Quantifying unit	0–1 (Unit)	

Required Fields and Key	Name	Description of Content	Type of Content	Size
	Result Frequency	When results are gathered: ● None ● Daily ● DailyMF ● Weekly ● Semi-Monthly ● Monthly ● Quarterly ● Semi-Annually ● Annually		
	Result Interval	Number of periods between collection. For example, a setting of Monthly, with an interval of 2, results in a frequency of every other month.	Integer	
	Result Day	Number of days offset into the period. For example, Monthly with a result day of 17, is the 17th of every month		
	Result Month	For Annually frequency, month of period that contains the frequency.	Integer	
	Collection Frequency	Result collection frequency	Constant	
	Collection Subfrequency	Result collection sub-frequency	Constant	
	Collection Interval	Result collection interval	Integer	
	Collection Day	Result collection day	Integer	
	Collection Month	Result collection month	Integer	
	Extension	Collection extension	Integer	
	PTD Frequency	Frequency for period-to-date results. This must be lower than the Result Frequency	Constant. See Result Frequency for values.	
	PTD Function	Function to use in period-to-date calculations: ● sum ● avg ● min ● max ● none	Constant	
	PTD Result	Value entered for a period-to-date result	Integer	

Required Fields and Key	Name	Description of Content	Type of Content	Size
	PTD Formula	Formula that calculates period-to-date values	Formula	
	Trend Offset	Number of previous periods to compare values. Must be 1 or higher.	Integer	
	Higher is Better	If high results indicate good performance, enter **T**	Constant	
	Result Formula	Formula that provides measure results	Formula	
	Score Formula	Formula that evaluates results to indicate performance	Formula	
	target Formula	The formula specified by *target*	Formula	
	Status Base	The values used to evaluate performance: ● Result ● Score ● PTD	Constant	
	Decimal Places	Setting for number of decimal places	Integer	
	Report Name	Name of the report	String	40
	Report URL	URL for the report	String	255
	Data Source	Name of the data source	String	40
	New Window	To launch reports in a new window, set to true	Constant	
	Rollup Formula	Used for dimensional measures only.	Formula	
	Priority	● 100 for primary measures ● 0 for secondary measures	Constant	
	Perspective	Primary perspective	0–1 (Perspective)	
	Secondary Perspective	Secondary perspective	0–*n* (Perspective)	
	Domains	Domain that contains the measure	0–n (Domain)	
	Owners	Owning employee	0–*n* (Employee)	
	Result Collectors	Employee who is result collector	0–*n* (Employee)	
	Target Setters	Employee who is the target setter	0–*n* (Employee)	
	Annotation Creators	Employee who is an annotation creator	0–*n* (Employee)	
	Target Frequency	How often the target value is gathered See “Frequencies” on page 116	Integer	
	Target Sub Frequency	Specific day on which target values should be entered	Integer	
	Target Interval	Number of periods before the next target is entered	Integer	

Required Fields and Key	Name	Description of Content	Type of Content	Size
	Target Day	Day on which target values are entered. For example, if you collect target values quarterly, specify the day in the quarter	Date	
	Target Month	For an annual period (8), enter the month during which target values are entered	Date	
	Collection Target Frequency	When targets should be entered. For example, to collect target values each month, use monthly frequency (5). See "Frequencies" on page 116	Integer	
	Collection Target Sub Frequency	Exact day, such as the last Monday of each quarter, on which target values should be entered.	Integer	
	Collection Target Interval	Number of periods that elapse between collection dates. For example, if you use a monthly frequency, but want two months to pass before the next collection, enter 2	Integer	
	Collection Target Day	Day on which the target is collected. For example, if a target is collected on April 12, enter 12.	Integer	
	Collection Target Month	For annual (8) periods: The month during which the target value is collected.	Integer	
	Collection Target Extension	Additional number of days during which target values can be entered	Integer	
	New tab	To provide a link to reports in a separate tab, enter 1. Otherwise, enter 0	Numeric field	

MeasureFactory

Use this behavior to import or export measure templates. Use the format specified in "Measure " on page 109, but and add the following

Dimension members — Top level dimension members to be associated with the template. Specify using 0–*n* (*Dimension Member*).

AddNamedRangestoMeasure Factory

Use this behavior to add a named range to, or extract it from, a measure template. The following columns are available, but only the Action column is required.

- Action—Constant (C, V, U, or D)
- Owner name—Text string of less than 255 characters that specifies the template name.
- Key—Text string that identifies the primary key
- ID—Integer that identifies the template ID
- Named range—Text string of less than 255 characters that specifies the name of the range.

- Date—Day on which to apply the named range to the template. Use a date format specified in the configuration file. See Table 21.

MeasureValues

Use this behavior to use a named range on a measure template.

Table 29 MeasureValues

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C,V,U,D	Constant	
K	Name	Measure name	String	255
	Key	Primary key	String	
	ID	Object ID	Integer	
K	Date	Date for which results were generated	Date	
	Result	Actual result value	Decimal	
	Target *target*	Value for the specified target	Decimal	
	Score *target*	Score for specified target	Decimal	
	PTD	Period-to-date value that is normally manually entered	Decimal	
	Status *target*	Name of performance level that is calculated using the specific target	String	255
	Trend	• TUG—trend is up if higher values are better • TDG—trend is down if higher results are worse • TUP—trend is up if higher results are worse • TDP—trend is down if higher results are better • TS—performance unchanged	Constant	

AddNamedRangeToMeasure

Use this behavior to import or export a named range used on a measure.

Table 30 AddNamedRangeToMeasure

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C,V,U,D	Constant	
K	Owner name	Measure name	String	255
	Key	Primary key	String	
	ID	Object ID that identifies the measure	Integer	

Required Fields and Key	Name	Description of Content	Type of Content	Size
K	Named range	Name of the custom range to assigned	String	255
K	Date	Date on which to use the range	Use the date format specified in table 45.	

MeasureTargetFormula

Use this behavior to import or export formulas that compute measure targets.

Table 31 MeasureTarget Formula

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C, V, U, D	Constant	
K	Name	Measure name	String	255
K	Target	Target name	String	255
	Formula	Formula to assign to the measure and target	Formula	

Scorecard

Use this behavior to import or export scorecards.

Table 32 Scorecard

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C, V, U, D	Constant	
K	Name	Name of the object to which the scorecard is attached	String	255
K	Type	Type of object to which the scorecard is attached: ● Employee ● AME ● SME	Constant	
	ID	Object ID	Integer	
K	Scorecard Name	Scorecard name	String	255
	Primary	If primary, the name of the scorecard	String	255
	Template	If derived from a template, the name of the template	String	255
	Template Weight	Amount of weight applied to items on the template (0.0 – 1.0)	Decimal	

Required Fields and Key	Name	Description of Content	Type of Content	Size
	Context	Members that comprise the dimensional context of the scorecard. Missing dimensions default to "top".	0–*n* (Dimension Numbers)	
	Categories	Categories to which the scorecard is assigned	0–*n* (Scorecard Categories)	
	Key	Primary keys	String. The value must be delimited within ${}. For example, ${32f.-1.-f419e0}.	
	ID	Object ID	Integer	
K	Scorecard Name	Name of secondary scorecards	String	255
	Date	Date on which to use the named range	Date	
	Named Range	Name of the named range assigned to the scorecard	0–1 (*Named Range*)	

ScorecardElements

Use this behavior to import or export scorecard elements.

Table 33 ScorecardElements

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C, V, U, D	Constant	
K	Name	Name of the object to which the scorecard is attached	String	255
K	Type	Type of object to which the scorecard is attached: ● Employee ● AME ● SME	Constant	
	ID	Object ID	Integer	
K	Item Name	Name of item to attach to a scorecard	1–1 (Employee, AME, SME)	
K	Item Type	Type of object to add to a scorecard: Employee, AME, SME, or Measure	Constant	
K	Order	Position of object on the scorecard	Integer	
K	Weight	Weighting of the object on the scorecard.	Decimal	
	Trend	Localized description of the trend	Constant	
	Target Score	Total score based on the target used to establish performance	Decimal	

Required Fields and Key	Name	Description of Content	Type of Content	Size
	Target Weighted Score	Total scorecard score based on the weighting of the target	Decimal	
	Target Status	Name of the status symbol that indicates the level or scorecard performance. Performance evaluated using the target specified.	String	

StrategyMap

Use this behavior to import or export Strategy maps.

Table 34 StrategyMap

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C, V, U, D	Constant	
K	Name	Map name	String	255
	Key	Primary key	String The value must be delimited within ${}. For example ${32f.-1.-f419e0}.	
	ID	Object ID	Integer	
K	Description	Purpose of the map	String	2000
	Domains	Domains with which the map is associated	0–*n* (Domain)	

Frequencies

Use these integers to specify how often measure results and target values are gathered or entered.

- 0—No frequency used
- 1—Data gathered every day
- 2—Data gathered during each business week (Monday — Friday)
- 3—Data gathered weekly
- 4—Data gathered twice a month
- 5—Data gathered monthly
- 6—Data gathered once every financial quarter
- 7—Data gathered twice a year
- 8—Data gathered annually

Subfrequencies

You can use these options to specify the day on which measure results or target values are collected or entered. For example, if data is entered or collected on the first Monday of the period, enter 10.

Table 35 Subfrequencies

Option	Integer
First	0
Last	1
Sunday	2
Monday	3
Tuesday	4
Wednesday	5
Thursday	6
Friday	7
Saturday	8
First Sunday	9
First Monday	10
First Tuesday	11
First Wednesday	12
First Thursday	13
First Friday	14
First Saturday	15
Last Sunday	16
Last Monday	17
Last Tuesday	18
Last Wednesday	19
Last Thursday	20
Last Friday	21
Last Saturday	22
Day offset	1

Option	Integer
First day offset	8
Last day offset	15
User defined	23
No weekend	24

StrategyMapElement

Use this behavior to import and export strategy map elements.

Table 36 StrategyMapElement

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C, V, U, D	Constant	
K	Name	Name of the element	String	255
	Key	Primary key	String: The value must be delimited within ${}. For example ${32f.-1.-f419e0}.	
	ID	Object ID	Integer	
	Description	Purpose of the map	String	2000
R	Map Name	Map on which the element is used	1–1 (Strategy Map)	
R	Parent	Parent element. If blank, the element is placed at the root level of the map	0–1 (SME)	
R	Order	Order of the element	Integer	
	Title	Element title. Overrides the default title, which is based on level in the map hierarchy	String	255
	Owners	Employee who owns the element	0–n (Employee)	
	Annotation Creator	Employee who is the annotation creator	0–n (Employee)	
	Perspective Primary	Most logically associated perspective	0–1 (Perspective)	
	Secondary Perspectives	Another logically associated perspective	0–n (Perspective)	
	Primary theme	Primary theme associated with the element	0–1 (Strategic Theme)	

Required Fields and Key	Name	Description of Content	Type of Content	Size
	Secondary Theme	Secondary theme associated with the element	0–n (Strategic Theme)	

Target Metadata

Use the Target Metadata behavior to import or export targets and sub targets for multi-value targets.

Table 37 Target Metadata

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C, V, U, D	Constant	
K	Name	Name of the target	String	255
	Key	Primary Key	String The value must be delimited within ${}. For example ${32f.-1.-f419e0}.	
	ID	Object ID	Integer	
	Description	Purpose of the target	String	2000
R	Multi-value	If the target has numerous values, enter TRUE.		
R	Order	If a target has multiple values, enter the number of values. For example, if a target called ProjectedSales, has a high and a low value, enter 2. See Table 38	Integer	
R	Parent	Name of the multivalue target		

If a target, ProjectedSales, has a high and low value, specify the following in the source file:

Table 38 Multi-Value Target Support

Action	Target Name	Order	Multi-Value	Parent
C	ProjectedSales	2	TRUE	
C	ProjectedSales-High		FALSE	ProjectedSales
C	ProjectedSales-Low		FALSE	ProjectedSales

Unit

Use the Unit Metadata behavior to import or export units.

Table 39 Unit Metadata

Required Fields and Key	Name	Description of Content	Type of Content	Size
R	Action	C, V, U, D	Constant	
K	Name	Name of the unit	String	255
	Key	Primary key	String The value must be delimited within ${}. For example ${32f.-1.-f419e0}.	
	ID	Object ID	Integer	
	Description	Purpose of the unit	String	2000
	Currency Code	Valid currency code.	String	16
	Scaling Factor	Scaling factors used to import or export to Shared Services: ● 1 ● 10 ● 100 ● 1000 ● 10000 ● 100000 ● 1000000	Constant	

Variables

Use the Variable Metadata behavior to import or export variable. To import or export variable result values, see "Variable Result " on page 121. The following columns are available, but only the Action column is required.

- Action—Constant (C, V, U, or D)
- Name—Text string of less than 255 characters that contains the variable name.
- Key—Text string that identifies the primary key. Delimited the value in ${}. For example ${32f.-1.-f419e0}.
- ID—Integer that identifies the variable ID
- Description — Text string of less than 2000 characters that summarizes how the variable is used.
- Result collectors—Employee who is the result collector. 0–*n* (*Employee*)

Variable Result

Use the Variable Results behavior to import or export variable results. The following columns are available, but only the Action column is required.

- Action—Constant (C, V, U, or D)
- Owner name—Text string of less than 255 characters that specifies the variable name.
- Key—Text string that identifies the primary key. Delimited the value in ${}. For example ${32f.-1.-f419e0}.
- ID—Integer that identifies the variable ID
- Result—Decimal of the result value to use.
- Date—Date on which the results were collected. Use a date format specified in the configuration file. See Table 21.

E

Web Page Restrictions

In This Appendix

About Web Page Restrictions

When creating a security role, you specify access to Web pages in the application for that role. If you apply multiple security roles to an account, the Web page restrictions associated with the *least* restrictive role are applied. For detailed instructions on creating a security role, see "Creating Security Roles" on page 23.

Selecting a Web Page Restriction hides that page from the user. To enable access, remove the Web Page from the list of Web Page Restrictions for the selected role. Select the role to be removed, right-click and select Delete from the shortcut menu. The restricted page is removed from the list, and the Web page is available.

When you create a new security role, default Web Page Restrictions are applied. See "Restricting Pages and Reports" on page 27.

Web Page Restriction Tables

Use these tables for information about Web restrictions:

- Table 40, "Global (Root) Designer Group," on page 124
- Table 41, "Hide Web Pages," on page 125
- Table 42, "Reports Restrictions," on page 127
- Table 43, "Admin Group Restrictions," on page 131
- Table 44, "Result Collection Administration Restrictions," on page 132
- Table 45, "Object View Tab on View Pane Restrictions," on page 132
- Table 46, "Designer Group Restrictions," on page 132
- Table 47, "General Group Restrictions," on page 134
- Table 48, "Alerts Group Restrictions," on page 135

Table 40 Global (Root) Designer Group

Restrictions	Description	Menu Path
Application Preferences	Prevent users from setting application preferences: ● Set up score limits ● Set up outdated data handling ● Add dates and frequencies for results collection ● Add external and Business Intelligence reports ● Set scorecard preferences ● Add categories and reporting periods for annotations ● Select masthead layout	File, then Application Preferences.
Dimension Setup	Prevent users from creating or modifying custom dimensions.	Object View and then Custom Dimension Setup
Framework List	Prevent users from adding, viewing or deleting frameworks.	Object View and then Framework List
Framework Setup	Prevent users from creating, modifying or deleting frameworks, including accountability and strategy hierarchies.	Object View, then Framework List, and then Add
Framework Terminology	Prevent users from creating, modifying or deleting terminology for a selected framework.	Object View, then Framework List, then Add, and then Terminology Tab
Named Range List	Prevent users from adding, viewing or deleting named ranges.	Object View, then Named Range List
Named Range Setup	Prevent users from creating, modifying or deleting named range characteristics.	Object View, then Named Range List, then Add, and then Named Range Setup
Performance Indicator List	Prevent users from adding, viewing or deleting performance indicators.	Object View, then Performance Indicator List
Performance Indicator Setup	Prevent users from creating, modifying or deleting performance indicator characteristics.	Object View tab, then Performance Indicator List, then Add, and then Performance Indicator Setup
Priority List	Prevent users from adding, viewing or deleting display priorities for any category.	Object View, then Category, and then Priority List
Priority Setup	Prevent users from adding, viewing or deleting the name, description or sequence of display priorities for any category.	Object View, then Category, then Priority List , then Add, and then Priority Setup
Scorecard Category List	Prevent users from adding, viewing or deleting display priorities for any scorecard category.	Object View, then Category, and then Scorecard Category List
Scorecard Category Setup	Prevent users from adding, viewing or deleting the name, description or sequence of display priorities for any scorecard category.	Object View, then Category , then Scorecard Category List, then Add, and then Scorecard Category Setup
Set System Default Preferences	Prevent users from setting default system preferences for all users of the application.	File, then Preference, then Preference Level, and then System Default Preferences
Target List	Prevent users from adding, viewing or deleting display priorities for any target.	Object View, then Target List

Restrictions	Description	Menu Path
Target Setup	Prevent users from adding, viewing or deleting the name, description or display sequence for any target.	Object View, then Target List, and then Add
Unit List	Prevent users from adding, viewing or deleting display priorities for any unit.	Object View, then Unit List
Unit Setup	Prevent users from adding, viewing or deleting the name, description or characteristics for any unit or monetary unit.	Object View, then Unit List, and then Add
Variable List	Prevent users from adding, viewing or deleting display priorities for any variable.	Object View, then Variable List
Variable Setup	Prevent users from adding, viewing or deleting the name, unit, description or result collectors for any variable.	Object View, then Variable List, then Add

Table 41 Hide Web Pages

Restriction	Description
Hide Accountability Scorecards	Hides the accountability Scorecards section in these locations: ● Performance Scorecard Report ● View Navigation Tree
Accountability Scorecards Section of Scorecard Performance Report	Hide only the accountability Scorecards section of the Performance Scorecard Report.
Accountability Scorecards Section of View Navigation Tree	Hides the accountability Scorecards section of the View Navigation tree.
Hide Alerts	Hide only the Alerts section of the View Navigation tree.
Alerts Section of View Navigation Tree	Hide only the Alerts section of the View Navigation tree.
Hide Employee Scorecards	Hides all these items: ● Employee Profiles Report (Reports then Employee Profiles Report) ● Employee Scorecards section of the Scorecard Performance Report ● Employee Scorecards section of the View Navigation tree.
Employee Profiles Report	Hide only the Employee Profiles Report (Reports, then Employee Profiles Report).
Employee Scorecards Section of Scorecard Performance Report	Hide only the Employee Scorecards section of the Scorecard Performance Report.
Employee Scorecards Section of View Navigation Tree	Hide only the Employee Scorecards section of the View Navigation tree.
Hide Initiative	Hide all these items: ● Initiative Section of View Navigation Tree ● Measure Details, Initiative Tab ● Scorecard Details, Initiative Tab
Initiative Section of View Navigation Tree	Hide only the Initiative Section of View Navigation tree.

Restriction	Description
Measure Details, Initiative Tab	Hide only the Measure Details, Initiative Tab.
Scorecard Details, Initiative Tab	Hide only the Scorecard Details, Initiative Tab.
Hide Measure	Hide only the Measure section of the View Navigation tree.
Measure Section of View Navigation Tree	Hide only the Measure section of the View Navigation tree.
Hide Notes	Hide all these items: ● Measure Notes tab ● Initiative Notes ● Notes Search ● Notes Search Results ● Tree view of the Notes Topic List ● Scorecard Notes tab.
Initiative Notes	Restrict access to initiative notes.
Measure Notes Tab	Hide only the Measure Notes Tab
Notes Search	Hide only the Notes Search
Notes Search Results	Hide only the Notes Search Results
Notes Topic List, tree view	Hide only the tree view of the Notes Topic list.
Scorecard Notes Tab	Hide only the Scorecard Notes Tab.
Hide Secondary Scorecards	Hide only the secondary scorecard section of the View Navigation tree.
Secondary Scorecard Section of View Navigation Tree	Hide only the secondary scorecard section of the View Navigation tree.
Hide Strategy Map Scorecards	Hide the Strategy Map Scorecards section of the View Navigation tree.
Strategy Map Scorecards Section of View Navigation Tree	Hide the Strategy Map Scorecards section of the View Navigation tree.
Hide Strategy Tree Scorecards	Hides these items: ● Strategy Scorecards section of the Scorecard Performance Report ● Strategy Tree Scorecards section of the View Navigation tree
Strategy Scorecards Section of Scorecard Performance Report	Hide only the Strategy Scorecards section of the Scorecard Performance Report.
Strategy Tree Scorecards Section of View Navigation Tree	Hide only the Strategy Tree Scorecards section of the View Navigation tree
Hide Variable	Hide the Variable section of the View Navigation tree.
Variable Section of View Navigation Tree	Hide the Variable section of the View Navigation tree.

Table 42 Reports Restrictions

Restriction	Description
Reports Group	Select **Reports Group** to hide all of the reports listed in this table, or select individual reports to restrict access to that report only. See the *Oracle Hyperion Performance Scorecard User Guide*.
Report Name	Menu Path
Accountability Element Setup	Object View , then Framework List , and then Add
Accountability Scorecard Details, General Tab	Object View, then Accountability Maps. then *map*, and then *scorecard*
Accountability Scorecards section of Scorecard Performance Report	Reports, then Scorecard Performance
Accountability Scorecards section of View Navigation tree	Browser View, then Scorecards, and then Accountability Maps
Alerts section of View Navigation tree	Browser View, then Alerts
Annotation and Initiative Tab	Browser View, then Scorecards, then *scorecard*, then the combined tab
Customize Page — Remove the Customize button from any of these pages:	
Customize Page Scorecard Details, Chart tab	Object View, then Scorecards, then *scorecard*, and then the Chart tab
Customize Page Employee Profiles	Report, then Employee Profiles
Customize Page Measure Details, Trending Chart Tab	Browser View, then Measures, then *measure*, and then the Chart tab.
Customize Page Measure Details, Trending Table Tab	Browser View, then Measures, then *measure*, then the Trending Table tab.
Customize Page Measure Performance Report	Reports, then Measure Performance Report
Customize Page Scorecard Performance Report	Reports, then Scorecard Performance Report
Customize Page Scorecard Report	Browser View, then Scorecards, and then *scorecard*
Employee — Hide any of these Employee Web pages	
Employee General Setup	Object View, then Employee List, and then Edit This option prevents an employee from modifying their own employee profile.
Employee Profiles Report	Reports, then Employee Profiles Report
Employee Scorecard Details, Accountability tab	Browser View, then Objects, then Scorecards, then Employee, then *scorecard*, and the Accountability tab.
Employee Scorecard Details, General tab	Browser View, then Objects, then Scorecards, then Employee, then *scorecard*, and then the General tab.

Restriction	Description
Employee Scorecards section of Scorecard Performance Report	Reports, then Scorecard Performance Report
Employee Scorecards section of View Navigation tree	Browser View, then Objects, then Scorecards, and then Employee
Employee Setup	Object View, then Objects, then Employee List, and then Add
Forum Menu	Select Forum from main menu.
Initiative Status Report	Reports, then Initiative Status
Initiative Report Customize	Reports, then Initiative Status, then Customize
Initiative Section of View Navigation tree	Browser View, then Objects, and then Initiatives
Map Editor	Object View, then Objects, then Maps, then *type*
Measures — Hide any of these Measure Web pages	
Measure Details, General tab	Browser View, then Objects, then *measure*, and then the General tab
Measure Details, Initiative tab	Browser View, then Objects, then *measure*, and then the Initiative tab
Measure Details, Part Of tab	Browser View, then Objects, then *measure*, and then Part Of tab
Measure Details, Results tab	Browser View, then Objects , then Measure, and then Results tab
Measure Details, Target tab	Browser View, then Objects, then Measure, and then the Targets tab
Measure Details, Trending Chart tab	Browser View, then Objects, then Measure , then the Charts tab
Measure Details, Trending Table tab	Browser View, then Objects, then Measure, then Trending Table tab
Measure Notes tab	Browser View, then Objects, then Measure, then Notes tab
Measure Performance Report	Reports, then Measure Performance Report
Measure section in View Navigation tab	Browser View, then Objects, then Measure
My View tab on View Pane	Select My View tab in View pane
Notes Search	Forum, then Search, then Notes Search
Notes Search Results	Forum, then Search, then Notes Search, select criteria, then click Search.
Notes Topic List, tree view	Browser View, then Scorecard, then Notes tab, then select Group by Topic
Post New Notes	Forum, then General Forum, then Post New Notes
Reports Menu	Select Reports from main menu.
Result Collection Customization	Reports, then Result Collection, then Customize
Result Collection Report	Reports, then Result Collection

Restriction	Description
Scorecards — Hide any of these Scorecard Web pages	
Scorecard Composite View Comments Pane	Browser View, then Objects, then Scorecards, then select a scorecard, select a measure and double-click to display Composite View with Comments pane, if selected.
Scorecard Composite View Initiatives Pane	Browser View, then Objects, then Scorecards, then *scorecard*, then double-click *measure*, and then select Composite View with Initiatives Pane
Scorecard Composite View Measure Chart Pane	Browser View, then Objects, then Scorecards, then *scorecard*, then the *measure,* and then double-click to display Composite View with Measure Chart pane
Scorecard Composite View Measure Trend Pane	Browser View, then Objects, then Scorecards, then select a scorecard, select a measure and double-click to display Composite View with Measure Trend pane, if selected.
Scorecard Composite View Scorecard Chart Pane	Browser View, then Objects, then Scorecards, then select a scorecard, select a measure and double-click to display Composite View with Scorecard Chart pane, if selected.
Scorecard Composite View Scorecard Trend Pane	Browser View, then Objects, then Scorecards, then select a scorecard, select a measure and double-click to display Composite View with Scorecard Trend pane, if selected.
Scorecard Details	Browser View, then Objects, then Scorecards, and then *scorecard*
Scorecard Details, Chart tab	Browser View, then Objects, then Scorecards, then *scorecard* and then the Chart tab.
Scorecard Details, Dial Chart	Browser View, then Objects, then Scorecards, then *scorecard*, and then the Chart tab Dial Chart displays if selected for customized charts.
Scorecard Details, Initiative tab	Browser View, then Objects, then Scorecards, then *scorecard*, then Initiative tab
Scorecard Details, Perspective Chart	Browser View, then Objects, then Scorecards, then *scorecard,* then the Chart tab, and then the Perspective Chart
Scorecard Details, Radar Chart	Browser View, then Objects, then Scorecards, then *scorecard* , then Chart tab, and then Radar Chart
Scorecard Details, Trend Chart (Bar)	Browser View, then Objects, then Scorecards, then *scorecard*, then Chart tab, and then Trend Chart (Bar)
Scorecard Details, Trend Chart (Line)	Browser View, then Objects, then Scorecards, then *scorecard* , then Chart tab, and then Trend Chart (Line),
Scorecard Details, Trending Table tab	Browser View, then Objects, then Scorecards, then *scorecard* , and then the Trending Table tab
Scorecard Notes tab	Browser View, then Objects, then Scorecards, then *scorecard* , and then the Notes tab
Scorecard Performance Report	Reports, then Scorecard Performance Report
Scorecard Trend Tab Customize Dialog	Browser View, then Objects, then Scorecards, then *scorecard* , then Trending Table tab, and then Customize
Scorecard Composite View Measure Chart Pane	Browser View, then Objects, then Scorecards, then *scorecard*, then Scorecard tab, then double-click the measure to display Composite View.
Scorecard Composite View Measure Trend Pane	Browser View, then Objects, then Scorecards, then *scorecard*, then the Scorecard tab, then double-click the measure to display Composite View.

Restriction	Description
Scorecard Composite View Measure Chart Pane	Browser View, then Objects, then Scorecards, then *scorecard* , then the Scorecard tab, and then double-click measure to display Composite View.
Scorecard Composite View Scorecard Chart Pane	Browser View, then Objects, then Scorecards, then *scorecard* , then the Scorecard tab, and then double-click measure to display Composite View.
Scorecard Composite View Scorecard Trend Pane	Browser View, then Objects, then Scorecards, then *scorecard* , then the Scorecard tab, and then double-click measure to display Composite View.
Scorecard Details	Browser View, then Objects, then Scorecards, and then *scorecard*
Scorecard Details, Chart tab	Browser View, then Objects, then Scorecards, then *scorecard* , and then the Chart tab
Scorecard Details, Dial Chart	Browser View, then Objects, then Scorecards, then *scorecard* , and then the Chart tab
Scorecard Details, Initiative tab	Browser View, then Objects, then Scorecards, then *scorecard* , and then the Initiative tab
Scorecard Details, Perspective Chart	Browser View, then Objects, then Scorecards, then *scorecard* , and then the Chart tab
Scorecard Details, Radar Chart	Browser View, then Objects, then Scorecards, then *scorecard*, and then the Chart tab
Scorecard Details, Trend Chart (Bar)	Browser View, then Objects, then Scorecards, then *scorecard* , and then the Chart tab
Scorecard Details, Trend Chart (Line)	Browser View, then Objects, then Scorecards, then *scorecard*, and then the Chart tab
Scorecard Details, Trending Table tab	Browser View, then Objects, then Scorecards, then *scorecard* , and then the Trending Table tab
Scorecard Notes tab	Browser View, then Objects, then Scorecards, then *scorecard* , and then the Notes tab
Scorecard Performance Report	Reports, then Scorecard Performance Report
Scorecard Trend Tab Customize Dialog	Browser View, then Objects, then Scorecards, then *scorecard*, then Trending Table tab, then Customize
Strategy Element	Object View, then Objects, then Maps, then *map or tree type*, then *scorecard*, then General tab
Strategy Map Scorecards section of the View Navigation tree	Browser View, then Objects, then Scorecards, then Strategy Maps
Strategy Report	Reports, then Strategy
Strategy Report Customization	Reports, then Strategy, then Customize
Strategy Scorecard Details, General Tab	Browser View, then Objects, then Scorecards, then Strategy Trees, then *scorecard*, then General tab
Strategy Scorecards Section of Scorecard Performance Report	Reports, then Strategy
Strategy Tree Scorecards Section of View Navigation Tree	Browser View, then Objects, then Scorecards, then Strategy Trees
User Preference Setup	File, then Preference

Restriction	Description
Variable Collection	Browser View, then Objects, then Variables, then Reports, then Results Collections, and then the Variable or Measure tab
Variable Details Results	Browser View, then Objects, then Variable, then *variable* , then Variable Details, and then the Results tab
Variable Details Trending Table	Browser View, then Objects, then Variable, then *variable*, then Variable Details, and then Trending Table tab
Variable section of View Navigation tree	Browser View, then Objects, then Variables
View Notes	Forum, then General Forum

Table 43 Admin Group Restrictions

Restrictions	Description	Menu Path
Admin Group	Prevents users from performing administrative tasks .	Select Administration from the main menu.
Accept HAL Requests	Prevents users from accepting HAL Requests.	
Accept Incoming Promotion Request	Prevents users from accepting incoming promotion requests.	Administration, then Promotion
Attachment Backup	Prevents a user from entering the backup directory for attachments.	Administration, then Attachment Backup
Audit Report	Prevent access to Audit Report which tracks changes made to business objects.	Administration, then Audit Report
Data Source Setup	Prevent users from adding, editing or removing an external data source for importing data.	Administration, then Data Source List, then Add
Dimension Selection Dialog		Object View, then Objects, then Custom Dimension Setup
Domain List	Prevent users from viewing a list of available domains.	Object View, then Objects, then Security, then Domain List
Domain Setup	Prevent users from adding, modifying or removing domains.	Object View, then Objects, then Security, then Domain List, then Add
External Data Source	Prevent a user from adding, modifying or removing an external data source.	Administration, then Data Source List
Locked Object Report	Deny access to the Locked Object Report to identify and break locks on any locked business objects.	Administration, then Locked Business object Report
Measure Permission Setup	Prevent users from adding, modifying or deleting measure permissions for other users.	Object View, then Objects, then Security, then Security Role List, then Add, then Security Role Setup, and then Measure Permission
Promotion Setup	Prevent a user from copying application data from one environment, such as Testing, to another environment, such as Production.	Administration, then Promotion

Restrictions	Description	Menu Path
Scorecard Permission Setup	Prevent users from adding, modifying or deleting scorecard permissions for other users.	Object View, then Objects, then Security, then Security Role List, then Add, then Security Role Setup, and then Scorecard Permission
Security Role List	Prevent a user from adding, modifying or deleting security roles.	Object View, then Objects, then Security, then Security Role List
Star Schema Generation	Prevent users from generating Star Schema tables or Oracle Essbase database of application data.	Administration, then Star Schema Generation
User Provisioning Migration	Prevent a user from performing this one-time operation to migrate and provision a large group of users through Oracle's Hyperion® Shared Services.	Administration, then User Provisioning Migration
User Session Report	Prevents users from identifying other users who are currently logged in to the application.	Administration, then User Session Report
User Session Report Customize	Prevents users from changing custom elements for the User Session Report.	Administration, then User Session Report, then Customize

Table 44 Result Collection Administration Restrictions

Restriction	Description	Path to Web Page
Result Collection Administration	Restrict the ability to edit locked measure results.	Reports, then Result Collection or Measure Results Report
Edit Closed Measure Results	Restrict the ability to edit locked measure results.	Reports, then Result Collection or Measure Results Report

Table 45 Object View Tab on View Pane Restrictions

Restriction	Description	Path to Web Page
Object View Tab on View Pane Restrictions	Hide the Object View tab in the View Pane, and its associated administrative options.	Select Object View tab in the View pane.
Object View Pane	Hide the Object View tab in the View Pane, and its associated administrative options	Select Object View tab in the View pane.

Table 46 Designer Group Restrictions

Restriction	Description	Path to Web Page
Designer Group	Prevents users from performing any designer tasks listed on this table.	As defined for each task on this table.
Application Preferences	Set personal or default system preferences to the application, such as measure result collection, calculation settings, and so on.	File, then Application Preferences
Dimension Setup	Prevents a user from adding, modifying or removing any elements from a custom dimension.	Object View, then Objects, then Custom Dimension Setup

Restriction	Description	Path to Web Page
Employee Copy	Prevent a user from copying an employee and the associated profile.	Object View, then Employee List, then *employee* , and then Copy
Employee List	Prevents users from creating, editing, and deleting employees.	Object View, then Employee
Framework List	Prevents a user from adding, modifying or removing a framework.	Object View, then Framework List
Framework Setup	Prevents a user from adding, modifying or removing a framework.	Object View, then Framework List, and then Add
Framework Terminology	Prevents a user from adding, modifying or removing custom terminology for the framework.	Object View, then Framework List, then Add, and then Terminology
Initiative Status List	Prevent a user from adding, modifying or removing an initiative status.	Object View, then Category, and then Initiative Status List
Initiative Status Setup	Prevent a user from adding, modifying or removing an initiative status.	Object View, then Category, then Initiative Status List, and then Add
Initiative Type List	Prevent a user from adding, modifying or removing an initiative type.	Object View, then Category, and then Initiative Type List
Initiative Type Setup	Prevent a user from adding, modifying or removing an initiative.	Object View, then Category, then Initiative Type List, and then Add
Map Editor	Prevent a user from adding, modifying or deleting a map.	Browser View, then Objects, then Map, then *map or tree*, and then Add
Measure Factory List	Prevent a user from creating, modifying or removing a measure template.	Object View, then Measure Template List
Measure List	Prevent a user from viewing a list of measures.	Object View, then Measure List
Measure Setup	Prevent a user from creating, modifying or removing a measure.	Object View, then Measure List, and then Add
Named Range List	Prevent users from adding, viewing or deleting named ranges.	Object View tab, then Named Range List
Named Range Setup	Prevent users from creating, modifying or deleting named range characteristics.	Object View tab, then Named Range List, then Add, and then Named Range Setup
Performance Indicator List	Prevent users from adding, viewing or deleting performance indicators.	Object View tab, then Performance Indicator List
Performance Indicator Setup	Prevent users from creating, modifying or deleting performance indicator characteristics.	Object View tab, then Performance Indicator List, then Add, and then Performance Indicator Setup
Priority List	Prevent users from adding, viewing or deleting display priorities for any category.	Object View tab, then Category, and then Priority List
Priority Setup	Prevent users from adding, viewing or deleting the name, description or sequence of display priorities for any category.	Object View tab, then Category, then Priority List, then Add, and then Priority Setup
Perspective Setup	Prevents a user from adding, modifying or removing a framework perspective.	Object View, then Framework List, then Add, then Display Perspectives, and then Add

Restriction	Description	Path to Web Page
Scorecard Category List	Prevent users from adding, viewing or deleting display priorities for any scorecard category.	Object View tab, then Category, and then Scorecard Category List
Scorecard Category Setup	Prevent users from adding, viewing or deleting the name, description or sequence of display priorities for any scorecard category.	Object View tab, then Category, then Scorecard Category List, then Add, and then Scorecard Category Setup
Scorecard Setup	Prevent a user from viewing a list of scorecard templates.	Object View tab, then *object type* , and then Add
Scorecard Template List	Prevent a user from viewing a list of scorecard templates.	Object View tab, then Scorecard Template List
Scorecard Template Setup	Prevent a user from adding, modifying or removing a scorecard template.	Object View tab, then Scorecard Template List, and then Add
Strategic Theme Setup	Prevents a user from adding, modifying or removing a strategic theme.	Object View, then Framework List, then Add, and then Display Themes
Strategy Map Editor	Prevent a user from adding, modifying or deleting a Strategy map.	Browser View, then Objects, then Map, then *map*, and then Add
Target List	Prevent users from adding, viewing or deleting display priorities for any target.	Object View tab, then Target List
Target Setup	Prevent users from adding, viewing or deleting the name, description or display sequence for any target.	Object View tab, then Target List, and then Add
Unit List	Prevent users from adding, viewing or deleting display priorities for any unit.	Object View tab, then Unit List
Unit Setup	Prevent users from adding, viewing or deleting the name, description or characteristics for any unit or monetary unit.	Object View tab, then Unit List, then Add, and then Unit List
Variable List	Prevent users from adding, viewing or deleting display priorities for any variable.	Object View tab, then Variable List
Variable Setup	Prevent users from adding, viewing or deleting the name, unit, description or result collectors for any variable.	Object View tab, then Variable List, then Add, and then Variable Setup

Table 47 General Group Restrictions

Restriction	Description	Path to the Web Page
File Menu	The File menu is removed from the main menu. Prevents a user from performing these tasks: ● Set Preferences or Application Preferences ● Print ● Export to Microsoft Excel ● Log off or exit the application	Select File from the main menu.
Edit Menu	The Edit menu is removed from the main menu. A user is unable to cut, copy or paste data.	Select Edit from the main menu.

Restriction	Description	Path to the Web Page
View Menu	Prevents user from accessing any menu options from the View group. ● Refresh the page ● Go to the Home Page ● Show or hide the masthead or View pane.	Select View from the main menu.
Reports Menu	See Table 42, "Reports Restrictions," on page 127.	Select Reports from the main menu, and expand to view options.
Forum Menu	Prevents user from accessing any menu options from the Forum group.	Select Forum from the main menu, and expand to view options.
Favorites Menu	Prevents user from setting the Favorites page: ● Add current page to list of favorites ● Edit Favorites	Select Favorites from the main menu, and expand to view options.
Administration Menu	Prevents user from accessing any menu options from the Administration group, and removes this option from the main menu.	Select Administration from the main menu, and expand to view options.

Table 48 Alerts Group Restrictions

Restrictions	Description	Path to Web Page
Alerts Group	Prevents a user from accessing any Alerter options. The Alerts option is removed from the Objects tree on the Browser View, and the Active Alerts report is removed from the Reports menu.	Browser View, then Objects, then Alerts Reports, then Active Alerts
Alert Setup	Prevents user from setting up (Alert Setup 1) or editing (Alert Setup 2) an alert.	Browser View, then Objects, then Alerts, then *type*, then Add or Edit
Alert List	Prevents a user from accessing the Alert List for Measures, Scorecards or Initiatives, depending on the selected alert type.	Path to selected alert list: ● Browser View, then Objects, then Alerts , and then Measure Alerts ● Browser View, then Objects, then Alerts, and then Scorecard Alerts ● Browser View, then Objects, then Alerts, and then Initiative Alerts
Alert Subscription List	Prevents a user from accessing the Subscriptions List for alerts.	Browser View, then Objects, then Alerts, and then Subscriptions
Alerts Report	Prevents a user from accessing the Active Alerts report.	Reports, then Active Alerts
Choose User for Bulk Subscription	Prevents the selection of a user for bulk subscription to alerts.	

F Frequently Asked Questions

In This Appendix

Backing Up Applications

For information about backing up and restoring old Performance Scorecard applications, see the *Oracle Hyperion Enterprise Performance Management Backup and Recovery Guide*.

Using Common Security

For information about using existing user directories or authentication providers, see the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*

Increasing Session Time-out

You can modify the session time-out setting to extend the amount of time the application allows to elapse before prompting you to log on again.

➤ To extend the default time-out:

1. **Shut down Oracle Hyperion Performance Scorecard, Fusion Edition.**
2. **From** `Install\Middleware\user_projects\epmsystem1\domains\EPMSystem\servers\HPSWebReports \tmp\_WL_user\HPSWebReports_11.1.2.0\ji0xwy\war\WEB-INF`**, open web.xml.**
3. **Modify the default value of 30 (minutes) in the code below as needed to increase the session time-out.**

```
<session-config>

<session-timeout> 30 </session-timeout>
```

```
</session-config>
```

4 Modify the default value of 60 (minutes) in the code as required to increase or decrease the time-out token:

```
<token>

<timeout> 60 </tieout>

</token>
```

5 Save and close the file.

6 Restart the application server and Performance Scorecard.

Increasing Startup Speed

You can increase the startup speed by modifying the Database Connection Pool setting in the main configuration file.

➤ To increase the start up speed:

1 Shut down Scorecard.

2 From `install\Middleware\user_projects\epmsystem1\HPS\hps instance \hpsfiles\config` open **HPSConfig.properties** in any text editor.

3 Add this code to the **Database Connection Pool Setting** section of the file:

```
hyperion.hps.main_data_store.pool.max_active=10

hyperion.hps.main_data_store.pool.when_exhausted_action=2

hyperion.hps.main_data_store.pool.max_wait=30000

hyperion.hps.main_data_store.pool.max_idle=5

hyperion.hps.main_data_store.pool.connection_cleanup_sleep_ time=60000

hyperion.hps.main_data_store.pool.connection_timeout=900000

hyperion.hps.main_data_store.pool.valid_connection_select=null="true"
```

4 Save and close the file.

5 Restart the Web application server.

6 Launch Performance Scorecard.

Increase Data Caching Limits

You can increase data caching limits to improve the performance of Scorecard.

➤ To increase data caching limits:

1 Shut down Scorecard.

2. From `install\Middleware\user_projects\epmsystem1\HPS\hps instance \hpsfiles\config`, open **HPSConfig.properties** in any text editor.
3. Extend the value of **hyperion.hps.formula. value-caching_limits** up to a value of 1000000.
4. Save and close the file.
5. Restart the Web application server.
6. Launch Performance Scorecard.

Tuning Garbage Collection for Sun JVM

If you are using Sun JVM, you can improve performance by tuning the Garbage Collection (GC) parameters of WebLogic.

➤ To tune GC:

1. In any text editor, open:`install\Middleware\user_projects\epmsystem1\domains \EPMSystem\bin\setCustomParamsHPSWebReports.bat`.
2. Locate this code:

```
set JAVA_OPTIONS=-server -Xms256m -Xmx1024m
```

3. Place this code at the end of the line:

```
Original line -XX:NewSize=128m -XX:MaxNewSize=128m -
XX:SurvivorRatio=16
```

Note: You can adjust these parameters and find the numbers that are best suited to your application.

4. Save and close the file.
5. Restart WebLogic.

Glossary

accountability element or team Usually used on an Accountability map, the accountability element represents the individuals or groups responsible for performing specific tasks or taking ownership of specific strategy elements.

accountability map A visual, hierarchical representation of the responsibility, reporting, and dependency structure of the accountability teams (also known as critical business areas) in an organization.

admin security role One of three default security roles provided, this role enables users to whose account it is applied to perform administrative tasks, such as create domains, manage user accounts, generate a Hyperion Essbase database, monitor alert activity, enable external authentication, and use Shared Services.

alert Object to which you subscribe to receive e-mail notification when performance for business objects departs from a defined acceptable range. Alerts can also be created to prompt subscribers when application-building tasks, such as measure result collection or initiative completion, are approaching or past their specified completion date.

alerter Component of Hyperion Performance Scorecard that facilitates alert notification e-mail and enables administrators to monitor alert activity. The alerter is deployed as a separate application to the Web application server.

application 1) A software program designed to run a specific task or group of tasks such as a spreadsheet program or database management system. 2) A related set of dimensions and dimension members that are used to meet a specific set of analytical requirements, reporting requirements, or both.

Audit Report An administrative feature that contains a record of all modifications made to the application and application components. Use the report to access information about which applications or application components have been modified, when, and by whom.

Balanced Scorecard A framework that emphasizes the role of your organization's strategy and the achievement of strategic goals based on the use of financial, customer, internal, and learning and growth perspectives.

business area See critical business area (CBA). or accountability element or team.

business object Any application component, such as a scorecard, measure, employee, variable, or framework. Changes to business objects are tracked using the Audit report.

cascading scorecard A scorecard that uses the scores of other, lower-level scorecards. For example, if you are building a scorecard for an element or employee that is responsible for, or whose performance should be affected by a lower-level scorecard score, you can add the lower-level scorecard to the scorecard you are building.

cause and effect map A map that depicts how the elements that form your corporate strategy relate and how they work together to meet your organization's strategic goals. A Cause and Effect map tab is automatically created for each Strategy map.

child An application component that is directly connected to another (parent) component as seen on Strategy maps, Accountability maps, and with scorecards.

collection extension An additional number of days that increase a measure's frequency, during which a measure's result collector can enter or modify measure results before the measure is locked. For example, for a measure with an expected collection date of May 26th, giving a collection extension of 3 days means that result collectors for the measure have until May 29th to enter or modify result values. After this date, May 30th and onward, the measure is locked.

collection frequency Generates a list of expected measure result collection dates. For example, to collect measure data twice a year, specify a collection frequency of semi-annually. If the dates calculated by this frequency elapse without a result being entered, and a collection extension for the measure is not given, the measure becomes locked and result collectors cannot enter result data.

comparator Also called a target, a comparator is a specific result value which a measure is expected or anticipated to collect in a particular period of time. Use multiple measure comparators to assess measure results against a variety of internal or external values. For example, you may want to establish a short and a long term comparator for a measure.Comparator values are entered using Hyperion Performance Scorecard's reports.

composite measure A measure that uses other measure result data to calculate its results. For example, employee productivity can be expressed as a composite measure because it can be assessed by examining: hours worked by employee, quantity of employee work, and quality of employee work.

critical business area (CBA) An individual or a group organized into a division, region, plant, cost center, profit center, project team, or process; also called accountability team or business area.

critical success factor (CSF) A capability that must be established and sustained to achieve a strategic objective; owned by a strategic objective or a critical process and is a parent to one or more actions.

designer Security role assigned to users and employees who build and modify applications and scorecards using the Designer work area. A designer user account is also provided with the product that can be used to log on and use Hyperion Performance Scorecard before specific user accounts have been created.

designer security role One of three default security roles provided, this role enables users to whose account it is applied to build and modify business objects using the object view.

dimension A data category used to organize business data for the retrieval and preservation of values. Dimensions usually contain hierarchies of related members grouped within them. For example, a Year dimension often includes members for each time period, such as quarters and months.

dimension measure template Template with one or more associated dimensions that is a used to create dimensional measures. Associating a dimension with a Dimension Measure Template automatically creates a dimension measure for each dimension member within the associated dimension.

dimensional measure A measure to which dimensional information is assigned. A dimension lets you group and analyze measure logically.

domain Object defined by an administrator that represents either a functionally or geographically distinct business area, such as a regional office, or a department within an organization. Most business objects, such as measures, employees, and scorecards are assigned to a particular domain. For example, scorecards assessing employee productivity may belong to the Human Resources domain.

employee A user responsible for, or associated with, specific business objects. Employees need not work for an organization; for example, they can be consultants. Employees must be associated with user accounts, for authorization purposes.

employee profile report Provides detailed information about each employee in your application, including the employee's scorecard and responsibilities.

equalize. A scorecard building feature that enables users to assign the same weighting to all measures on a scorecard.

external authentication Logging on to Oracle EPM System products with user information stored outside the application. The user account is maintained by the EPM System, but password administration and user authentication are performed by an external service, using a corporate directory such as Oracle Internet Directory (OID) or Microsoft Active Directory (MSAD).

framework A methodology that facilitates a disciplined approach to translate performance strategy into action. Frameworks identify areas that are critical to the achievement of organizational goals and performance targets and outline how they must act to achieve the mission and vision of the organization. Often called "The pillars of success". Commonly used frameworks include Balanced Scorecard, Malcolm Baldridge, and Andersen Value Dynamics.

frequency Determines when, how often, and the latest possible date on which measure results must be collected. See collection frequency. and result frequency.

initiative A task or group of tasks that an organization executes to achieve one or more strategic objectives. In a Hyperion Performance Scorecard application, each action box represents an activity or task that helps to accomplish a strategic objective. See action.

initiative status report Lists the strategy and accountability elements to which initiatives are attached and the individuals or groups who are responsible for carrying them out. The Initiatives Status report also identifies the status, priority, and assigned completion date of each initiative.

integration A process that is run to move data between Oracle's Hyperion applications using Shared Services. Data integration definitions specify the data moving between a source application and a destination application, and they enable the data movements to be grouped, ordered, and scheduled.

Locked Business Object Report Identifies and unlocks business objects such as measures, targets, and reports that are locked because they are being modified or have become otherwise frozen.

Map Navigator A feature that displays your current position on a Strategy, Accountability, or Cause and Effect map, indicated by a red outline.

measure Objective, quantifiable data that indicates the level of progress toward a performance target. Measure results can be scalable (fall within a range of values) or absolute. Measures are associated with strategy elements and accountability teams.

measure performance report Hyperion Performance Scorecard report that provides detailed information about each measure.

measure permissions Setting specified for a user account's security role that provides global or conditional access to measures.

metadata A set of data that defines and describes the properties and attributes of the data stored in a database or used by an application. Examples of metadata are dimension names, member names, properties, time periods, and security.

mission A statement that defines the immediate, key business goals of the accountability teams or critical business areas that form the structure of that organization.

model 1) In data mining, a collection of an algorithm's findings about examined data. A model can be applied against a wider data set to generate useful information about that data. 2) A file or content string containing an application-specific representation of data. Models are the basic data managed by Shared Services, of two major types: dimensional and nondimensional application objects. 3) In Business Modeling, a network of boxes connected to represent and calculate the operational and financial flow through the area being examined.

multidimensional database A method of organizing, storing, and referencing data through three or more dimensions. An individual value is the intersection point for a set of dimensions. Contrast with relational database.

non-dimensional model In Shared Services, a type of model that includes application objects, such as security files, member lists, calculation scripts and Web forms.

normalize This feature is a scorecard building option that can be used if a scorecard's weight must add to 100, but users want to retain the different weighting ratio for each measure and perspective on the scorecard.

owner The individual or group responsible for a strategy element.

parent An application component, such as an Entity or strategic objective that has one or more application components below it on a map that are directly connected to it. These components are called its children. Scorecards can also be parents if lower-level scorecards are attached to them.

performance indicator An image file used to represent measure and scorecard performance based on a range you specify; also called a status symbol. You can use the default performance indicators or create an unlimited number of your own.

permission Security role setting that defines a user's access to scorecards and measures.

perspective A category used to group measures on a scorecard or strategic objectives within an application. A perspective can represent a key stakeholder (such as a customer, employee, or shareholder/financial) or a key competency area (such as time, cost, or quality).

primary measure A high-priority measure important to your company and business needs. Displayed in the Contents frame.

product In Shared Services, an application type, such as Planning or Performance Scorecard.

promotion Means of transferring application data to a different environment or database server. Promotion is essentially the replication of application data from one environment such as development to another environment such as production.

restriction Means of denying access to specific measures, scorecards, and web pages. Restrictions are applied to security roles which are applied to user accounts.

result date The day on which Hyperion Performance Scorecard collects a measure result value as determined by a measure's frequency, for use in reports.

result formula A measure's result formula determines how measure result data is calculated and assessed. For example a result formula for the measure Net Income could be: ((mResult("Net Sales") - mResult("Cost of Sales")) - mResult("Operating Expenses").

result frequency The algorithm used to create a set of dates to collect and display results.

role The means by which access permissions are granted to users and groups for resources.

score The level at which targets are achieved, usually expressed as a percentage of the target.

scorecard A business object that represents the progress of an employee, strategy element, or accountability element toward goals. Scorecards ascertain this progress based on data collected for each measure and child scorecard added to the scorecard.

scoring formula A score formula for a measure determines how the measure's results will be assessed to produce a final measure score.

secondary measure A low-priority measure, less important than primary measures. Secondary measures do not have Performance reports but can be used on scorecards and to create dimension measure templates.

service provider Authentication provider.

Shared Services Registry The part of the Shared Services repository that manages EPM System deployment information for most EPM System products, including installation directories, database settings, computer names, ports, servers, URLs, and dependent service data.

Stern Stewart's EVA Framework. Framework reputed to capture the true economic profit of an organization by calculating the net operating profit minus an appropriate charge for the opportunity cost of all capital invested in an enterprise. This framework is meant to provide the most accurate measure of corporate performance over any given time.

strategic objective (SO) A long-term goal defined by measurable results. Each strategic objective is associated with one perspective in the application, has one parent, the entity, and is a parent to critical success factors or other strategic objectives.

strategic theme High-level categories of strategy you can use to group lower-level strategy elements on Cause and Effect maps.

Strategy map Represents how the organization implements high-level mission and vision statements into lower-level, constituent strategic goals and objectives.

synchronized The condition that exists when the latest version of a model resides in both the application and in Shared Services. See also model.

target Expected results of a measure for a specified period of time (day, quarter, and so on).

user directory A centralized location for user and group information, also known as a repository or provider. Popular user directories include Oracle Internet Directory (OID), Microsoft Active Directory (MSAD), and Sun Java System Directory Server.

vision Definition created by a business or organization of its goals and business strategies.

weight A value assigned to an item on a scorecard that indicates the relative importance of that item in the calculation of the overall scorecard score. The weighting of all items on a scorecard accumulates to 100%. For example, to recognize the importance of developing new features for a product, the measure for New Features Coded on a developer's scorecard would be assigned a higher weighting than a measure for Number of Minor Defect Fixes.

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