Oracle® Balanced Scorecard

Administrator Guide

Release 11*i*

Part No. A95236-09

March 2005

ORACLE

Oracle Balanced Scorecard Administrator Guide, Release 11*i*

Part No. A95236-09

Copyright © 1999, 2005, Oracle. All rights reserved.

Primary Author: Claudia Castro

Contributing Author: Vinod Bansal, Sameer Chhabra, Christine Monk, Patricia Perdomo, Manuel Puyana, Kris Sudharsan, Ling Wu

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

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

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

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

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

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

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Contents

Send Us Your Comments

1 Introduction

Balanced Scorecard Methodology . . . 1- 1
Balanced Scorecard Perspectives . . . 1- 2
Oracle Balanced Scorecard . . . 1- 2
Overview of Designing Scorecards . . . 1- 5
Overview of Administering Scorecards . . . 1- 5

2 Scorecards

Overview of Creating Scorecards . . . 2- 2
Create Scorecards and Scorecard Hierarchies . . . 2- 3
Add Objectives . . . 2- 5
Enable Views . . . 2- 6
Create Custom Views . . . 2- 8
Create Launchpads . . . 2-11
Enable Additional Information Column . . . 2-12
Add Logos . . . 2-12
Filter Common Dimensions . . . 2-13
Limit Number of Dimension Values . . . 2-14
Set Up Alarms if Performance is Above 100% . . . 2-14
Set Up Pie Chart . . . 2-14

3 Objectives

Overview of Creating Objectives . . . 3- 1
Create Objectives . . . 3- 3
Create KPIs . . . 3- 8
Create Single Bar KPIs . . . 3- 9
Create Multiple Bar KPIs . . . 3-14
Create Simulation Trees . . . 3-14
Create Profit and Loss . . . 3-15
Create Data Source Groups . . . 3-15
Create Dimensions . . . 3-16

4 Portlets

Balanced Scorecard Portlets 4- 1
Indicator Graph Portlet 4- 1
List of Indicators Portlet 4- 2
Custom View Portlet 4- 3
Configure a Custom View Portlet 4- 3
Grant Access to a Balanced Scorecard Portlet 4- 3

5 Security

Assign Responsibilities to Users 5- 1
Assign Scorecards to Users 5- 2
Assign Roles to Designers 5- 3

6 Set Up

Set Up Global Parameters 6- 1

7 Generate Database

Overview of Generating the Database 7- 1
View Current Status 7- 2
Run the Generate Database Process 7- 3
View Generated Documentation 7- 6
Monitor Requests 7- 7
Troubleshooting 7- 7

8 Data Loader

Overview of Loading Data 8- 1
Load Dimension Objects 8- 1
Load Objective Interface Tables 8- 4
Load Objectives 8- 5
Delete Objective Data 8- 5
Advance Calendar 8- 6
Monitor Requests 8- 7

9 User Sessions

Manage Multiple User Sessions 9- 1

10 Migration

Overview of Migrating Balanced Scorecard Systems 10- 1
Create Links Between Systems 10- 1
Migrate Systems 10- 2

Send Us Your Comments

Oracle Balanced Scorecard Administrator Guide, Release 11*i*

Part No. A95236-09

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

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

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

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

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

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

1

Introduction

This chapter covers the following topics:

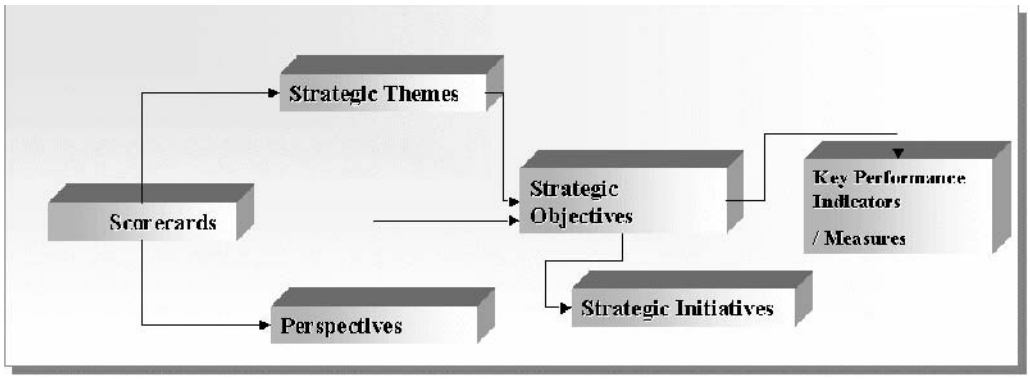
- Balanced Scorecard Methodology
- Balanced Scorecard Perspectives
- Oracle Balanced Scorecard
- Overview of Designing Scorecards
- Overview of Administering Scorecards

Balanced Scorecard Methodology

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

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

Scorecard Theory



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

Balanced Scorecard Perspectives

The Balances Scorecard methodology measures performance using four perspectives:

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

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

It is important to understand how the financial perspective is related to the other Balanced Scorecard perspectives.

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

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

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

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

Oracle Balanced Scorecard

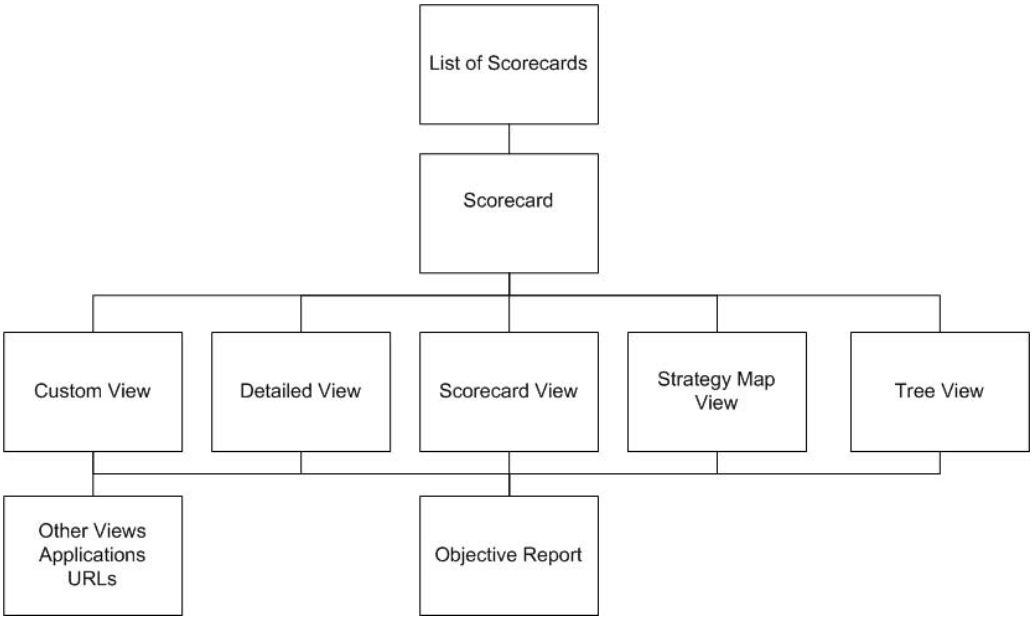
Oracle Balanced Scorecard is a strategic management application that is based on the Balanced Scorecard methodology developed by Kaplan and Norton.

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

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

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

Scorecard Navigation



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

- **Viewers** who are the end-users responsible for using scorecards to monitor performance,
- **Designers** who are responsible for creating the scorecards, and
- **Administrators** who are responsible for setting up the application and maintaining the data structure.

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

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

Terminology

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

- **Administrator:** The scorecard administrator is responsible for installing, implementing, and maintaining Balanced Scorecard. The scorecard administrator loads data and is responsible for managing any data-related issues. The scorecard administrator is also responsible for creating and setting up users, and securing scorecards, objectives, and display options.

- **Alarm:** Indicates the status of an objective. The possible statuses are: acceptable, marginal, or unacceptable. The status is based on how the objective falls within a set of defined tolerance ranges for the objective's expected performance. For example, if Revenue decreases by more than 5%, then the alarm will indicate that Revenue is either marginal or unacceptable performance, depending on how the tolerance ranges are set. If an objective is supported by several KPIs, then the status of the objective is the status for the default KPI for the objective.
- **Custom:** In this guide, "custom" is used to denote any content created using the application.
- **Designer:** The scorecard designer is responsible for creating the scorecards, views, KPIs, objectives, and dimensions. The scorecard designer defines the default settings for scorecards and the objective report. The scorecard designer also sets the alarm conditions for the objectives.
- **KPI:** A calculation or metric that is used to support an objective. Each objective can be supported by one or more KPIs; however, there is only one default KPI for each objective. The status of the default KPI determines the status of the objective. KPIs can be preseeded or created by the scorecard designer.
- **Objective:** A metric used to gauge performance in a particular area, for example, Increase Revenue, Reduce Service Calls, and Maximize Sales Growth.
- **Preseeded:** In this guide "preseeded" is used to denote any content that is provided with Oracle Applications. For example Oracle Daily Business Intelligence provides several preseeded KPIs that can be reused in other applications.
- **Production:** Refers to any scorecard which is available to viewers in the List of Scorecard window. To be a production scorecard, the design must be complete and the Generate Database process and the Data Load process must have been run. Also, the user must be assigned access for the scorecard.
- **Scorecard:** A representation of a company strategy that maps objectives and KPIs to the strategy using the Balanced Scorecard methodology. Viewers use the scorecard to compare actual and planned performance.
- **Strategy:** A high-level plan that a company wants to follow. A strategy is generally a collection of objectives. For example, a strategy might be to improve overall business by increasing customer satisfaction, reducing the cost of goods sold, and increasing sales.
- **View:** A way of viewing a scorecard. There are five possible views available in Oracle Balanced Scorecard:
  - Tree view
  - Scorecard view
  - Strategy Map view
  - Detailed view
  - Custom view
- **Viewer:** The Viewer is the user who is responsible for using the scorecard to compare actual corporate performance to planned or forecasted performance.

Overview of Designing Scorecards

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

Designers with the Performance Management Designer responsibility can create scorecards and the objectives, KPIs, and dimensions that support those scorecards.

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

- Reporting
  - Scorecards
  - Launchpads
- Performance Measures
  - Measures (KPIs)
  - Dimensions
  - KPIs (Objectives)

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

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

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

Overview of Administering Scorecards

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

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

- Global Setups
- Database
  - Generate Database
  - Review Objectives

    - Review Tables
    - Monitor Requests
- Data Loader
    - Dimension Objects
    - Objectives
    - Objective Interface Tables
    - Maintain Calendars
    - Monitor Requests
- Session Management
- Security
    - Administer End User Access
    - Administer Designer Access

The ability to migrate systems is only available in Balanced Scorecard Architect. You can access this feature using the Performance Management Administrator responsibility, but you must have implemented Balanced Scorecard Architect. For information on how to implement BSC Architect, see: *Oracle Balanced Scorecard Install Guide*.

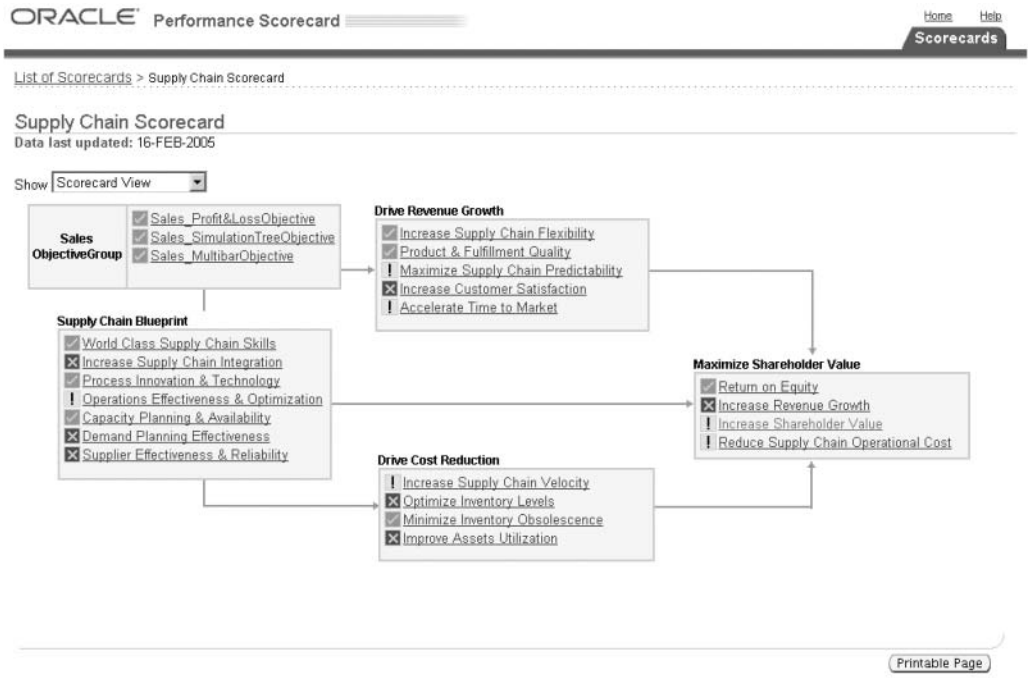
2

Scorecards

This chapter covers the following topics:

- Overview of Creating Scorecards
- Create Scorecards and Scorecard Hierarchies
- Add Objectives
- Enable Views
- Create Custom Views
- Create Launchpads
- Enable Additional Information Column
- Add Logos
- Filter Common Dimensions
- Limit Number of Dimension Values
- Set Up Alarms if Performance is Above 100%
- Set Up Pie Chart

Overview of Creating Scorecards



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

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

Before you begin creating scorecards:

- Do a thorough analysis of how your corporate strategy maps to scorecards and objectives.
- Define objectives, KPIs and dimensions before you create scorecards. You must create at least one objective before you can create a scorecard.

The process for creating a scorecard is very simple:

- Create scorecard and scorecard hierarchy
- Add KPIs
- Enable Views

After you create a scorecard, Designers and Administrator can configure the following scorecard characteristics at the site level:

- Enable the Additional Information column for the List of Scorecards
- Add corporate logos or branding images to the header of all scorecards
- Limit the number of dimension values displayed in all scorecards.

These characteristics apply to all scorecards in the same instance.

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

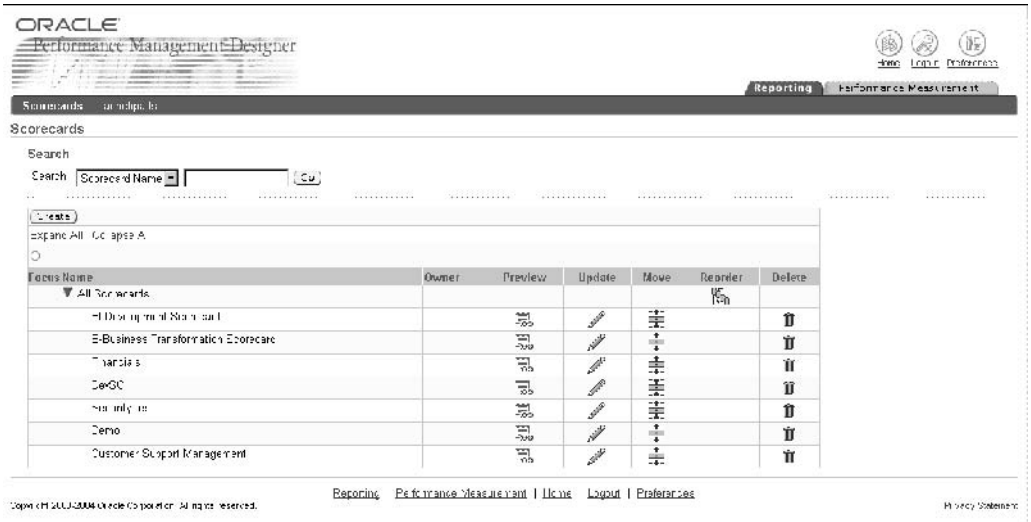
The following are the scorecard-specific procedures that the designer, and in some cases the administrator, can perform.

1. Create Scorecards and Scorecard Hierarchies, page 2- 2
2. Add Objectives, page 2- 5
3. Enable Views, page 2- 6
4. Create Custom View, page 2- 8
5. Create Launchpads, page 2-11
6. Enable Additional Information Column, page 2-12
7. Add Logos, page 2-12
8. Filter Common Dimensions, page 2-13
9. Limit Number of Dimension Values, page 2-14
10. Set Up Alarms if Performance is Above 100%, page 2-14
11. Set Up Pie Chart, page 2-14

Related Topics

Oracle Balanced Scorecard User Guide

Create Scorecards and Scorecard Hierarchies



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

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

There is no limit to the number of scorecards or scorecard hierarchies that you can create; however:

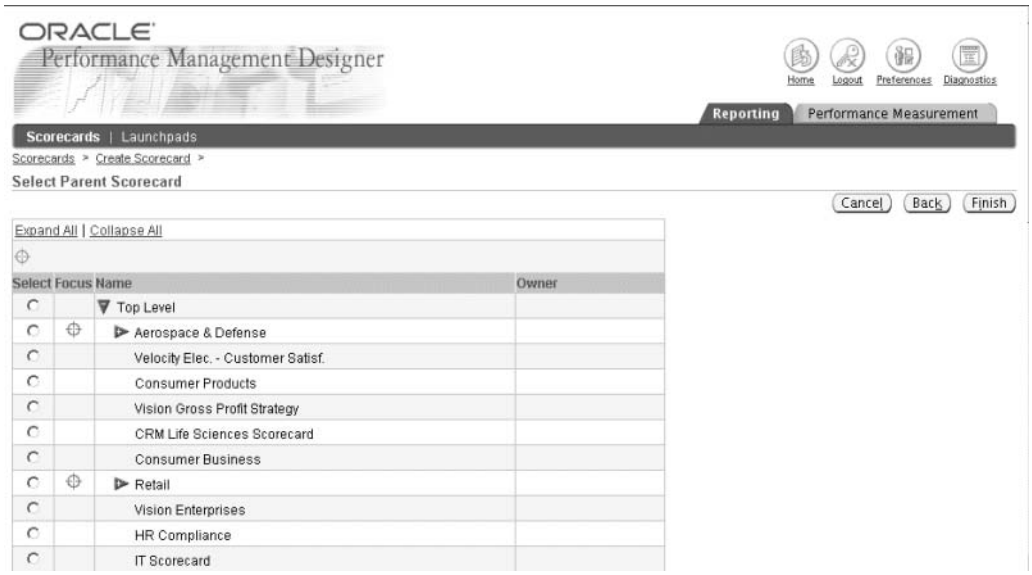
- there can only be one parent scorecard for each hierarchy;
- a scorecard cannot appear twice in the same hierarchy.

To create a scorecard:

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

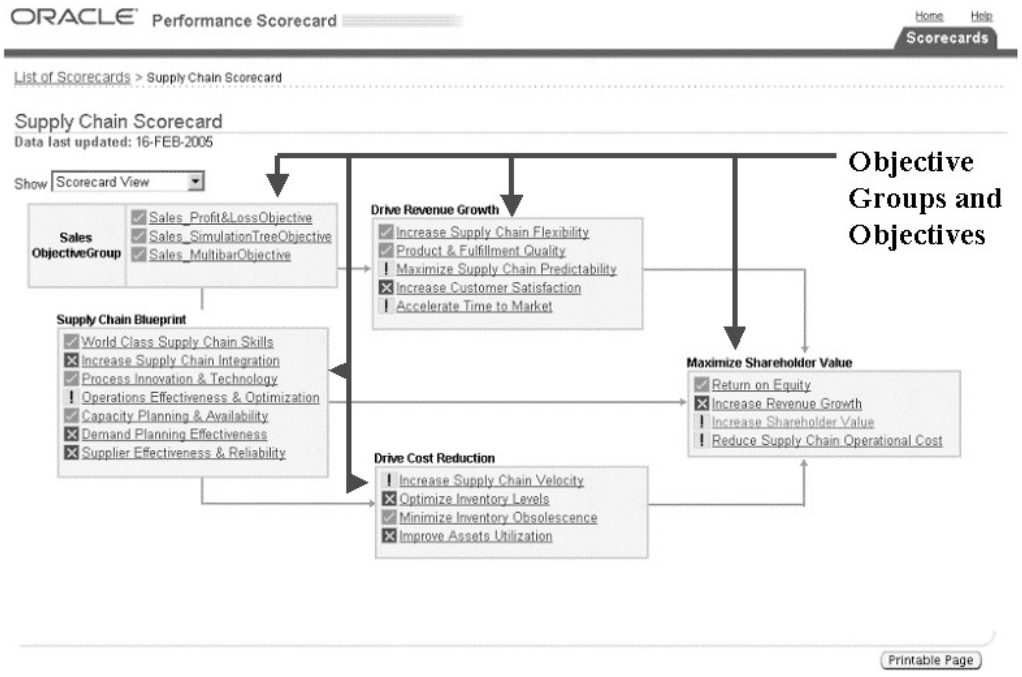
   There can be only one owner for each scorecard. Owners can be any Oracle Applications user with a Balanced Scorecard responsibility assigned and an e-mail address defined.

   The list of available owners is not restricted to the qualified Oracle Applications users. Check with your system administrator to see which users can be scorecard owners.
5. If you want to add the scorecard to a hierarchy, select a parent scorecard from the list of available scorecards.



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

Add Objectives



An *objective* is a metric used to gauge performance in a particular area, for example, Increase Revenue, Reduce Service Calls, and Maximize Sales Growth. Each objective can be comprised of one or more KPIs.

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

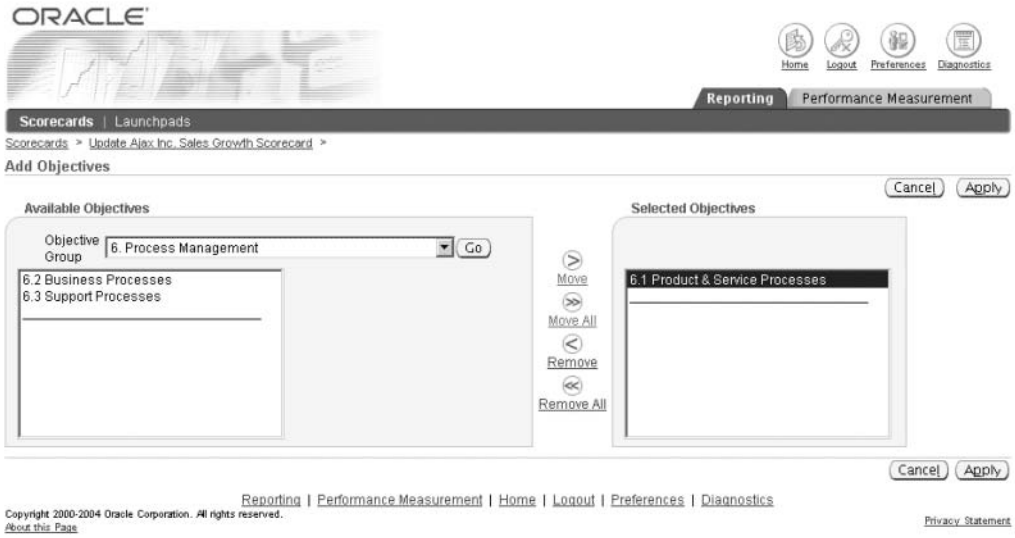
Prerequisites

❒ Create objectives, page 3- 1

To add objectives to a scorecard:

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

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



6. Click Apply to save your work.

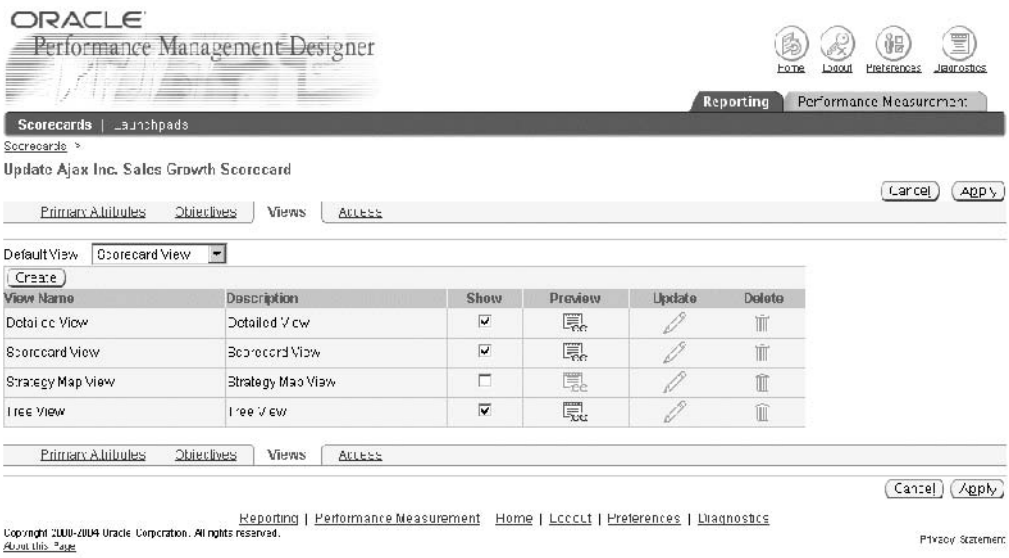
Enable Views

Enable the views that you want to use with the scorecard. By default each scorecard has the Scorecard, Tree, and Detailed Views enabled.

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

To enable views:

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



4. If you want to disable the Scorecard View, Tree View, or Detailed View, disable the Show check box next to the view.
5. If you want to enable the Strategy Map View, enable the Show check box next to the view.
6. To add a Custom View, you must create it. Click Create to create a custom view.

   You can create as many custom views as you want for the scorecard.
7. Set the default view for the scorecard, by selecting a view from the drop down list.

   Tip: Select the most commonly used view as the default view.

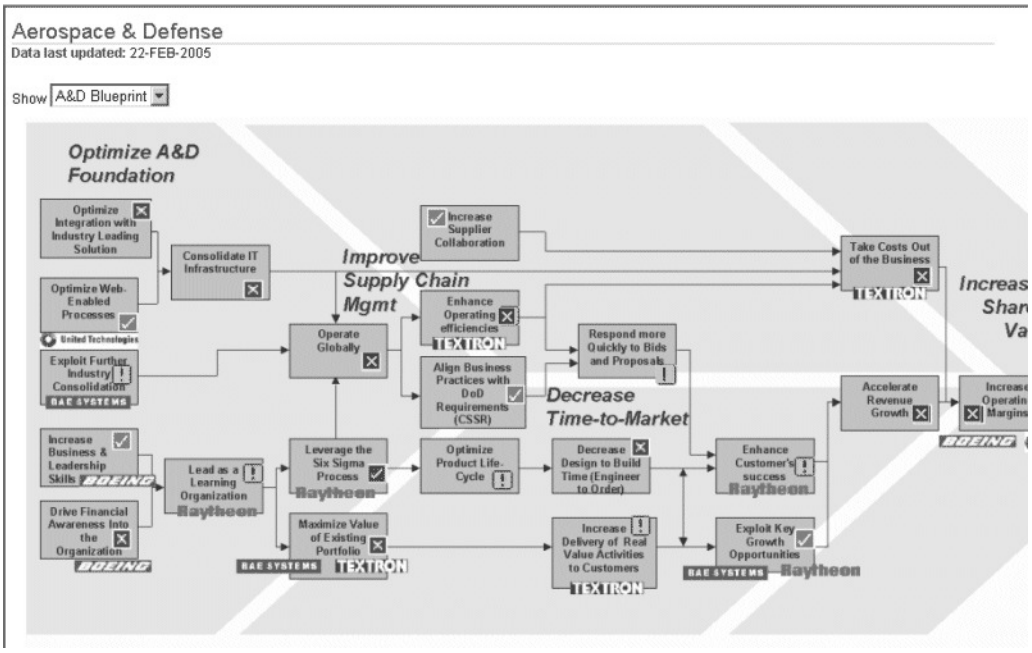
8. Click Apply to save your work.

Related Topics

Create Custom Views, page 2- 8

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

Create Custom Views



Custom views are the only views that enable you to navigate across multiple related views and drill down to more detailed information for a particular scorecard. You can create and enable multiple custom views for each scorecard. By default, when you create a custom view it is automatically enabled for the scorecard.

Custom views differ from other views because they:

- Include a background image.
- Enable you to select which objectives you want to display.
- Link to other custom views or Oracle Applications form functions.
- Include launchpads that link to other content, such as presentations or URLs.

When you create a custom view, consider the following:

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

It is recommended that you preview custom views and test any launchpads before you move the scorecard into production mode.

Prerequisites

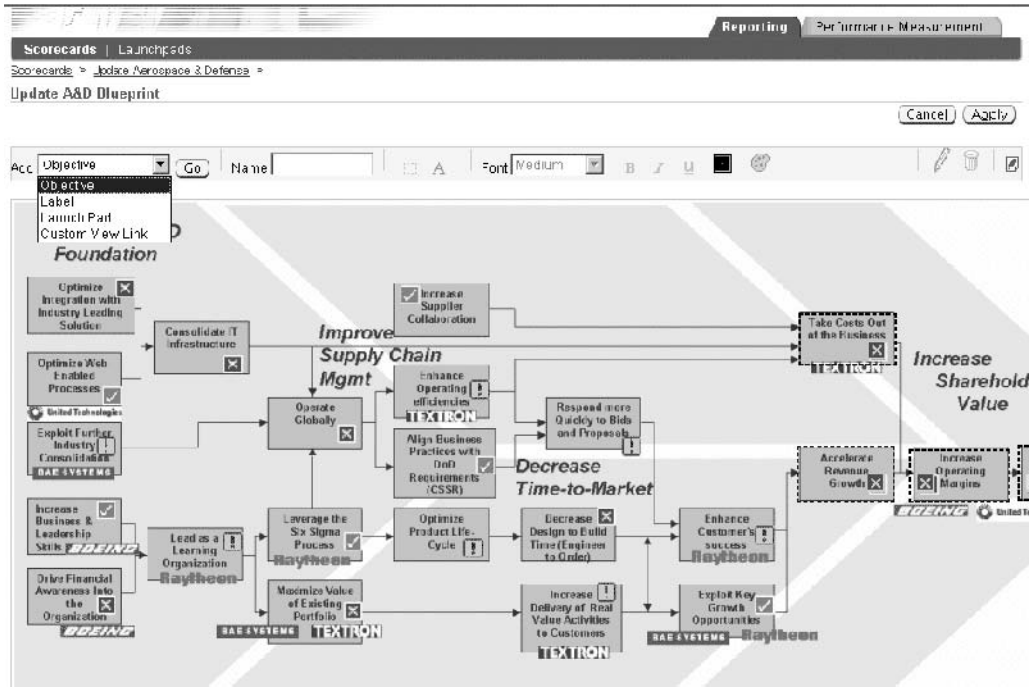
❒ Create launchpads (optional), page 2-11

To create a custom view:

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

3. Enter a name and description for the view.
4. Add a background image for the view and click Continue.

   The background image can be any GIF, JPG, Flash, .SFW, or SVG file. The maximum recommended size for the image is 1MB.
5. Add content to the view by selecting Objective, Label, Launch Pad, or Custom View Link from the drop down list, then click Go.



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

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

You can edit the objective as follows:

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

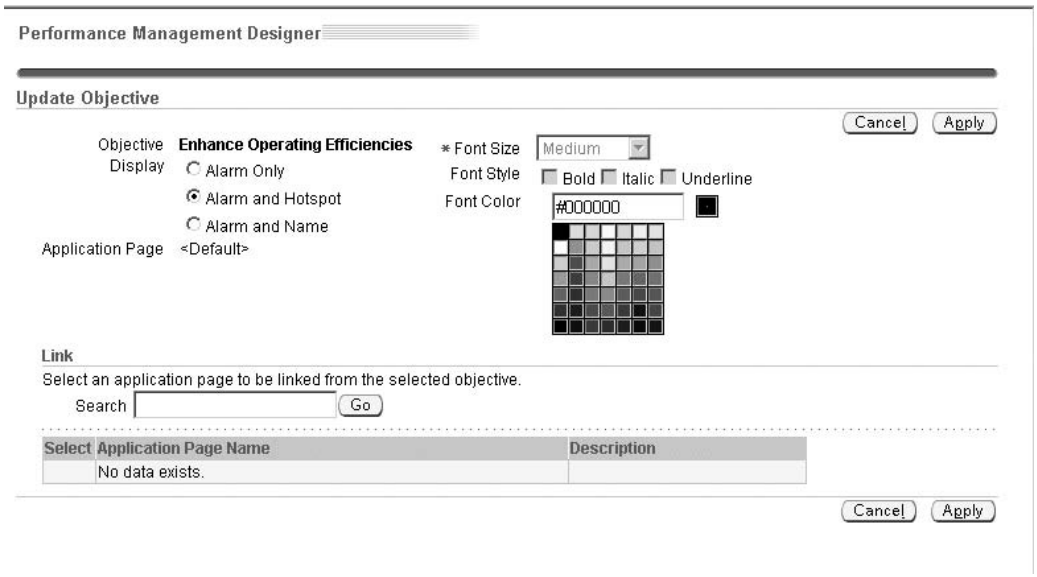
  To add a hotspot, select the objective, then select the hotspot icon. You can drag the hotspot to increase or decrease the size.

Launchpads: Drag and drop launchpads anywhere on the view.

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

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

6. If you want to update all of the objective properties at once, select the objective and click the Update icon.



You can update the following properties:

- Display

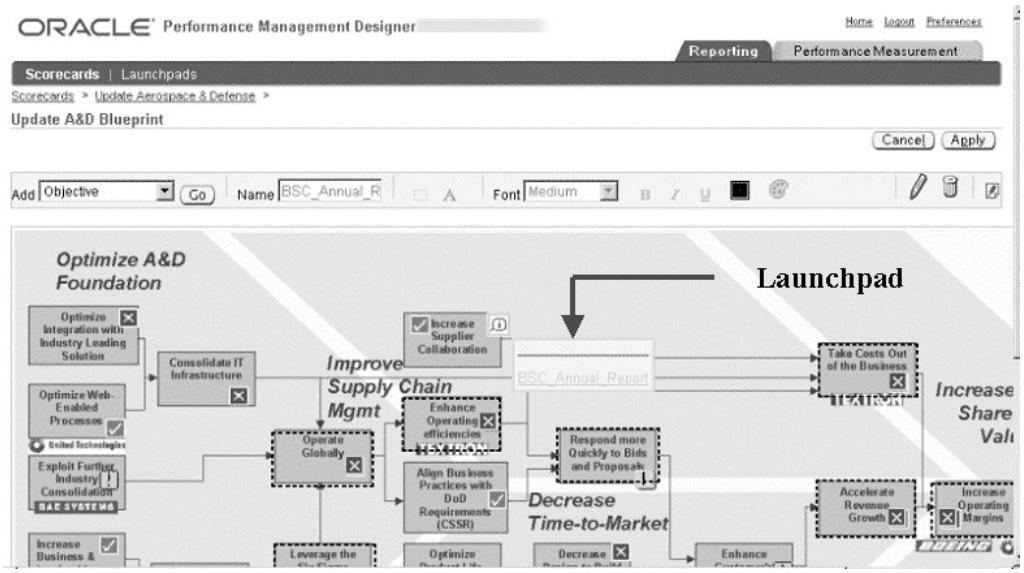
  Select one of the following display options: Alarm only, Alarm and Name (label), or Alarm and Hotspot

- Font size, style, and color
- Link

If the default KPI for the objective is a preseeded KPI, you can also choose whether you want to display actual or change data for the objective.

7. Click Apply to save your custom view.

Create Launchpads



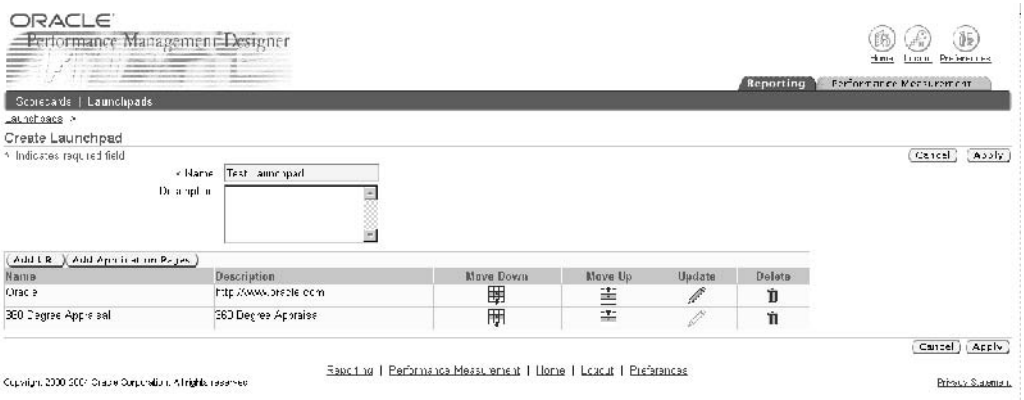
A *launchpad* is a group of links to other information sources, such as presentations, documents, websites. You can add launchpads to custom views. Launchpads appear as small "i" icons. You can click the icon to view the links in the launchpad.

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

If the launchpad contains links to an Oracle Application form function, secure those links by adding the launchpad, as a sub menu, for each responsibility that will access the launchpad.

To create a launchpad:

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



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

To secure the launchpad

8. Log into Oracle Applications using the System Administrator responsibility.
9. Select Security > Responsibility > Define.
10. Query the responsibility that you want to assign the launchpad to. For example, Performance Management User.

    Make a note of the menu that is attached to the responsibility.
11. Navigate to Applications > Menu.
12. Select the menu that you noted earlier for the responsibility.
13. Add the launchpad as a Sub Menu.

    Leave the Prompt field empty so the launchpad doesn't appear in the OA Self Service Menu for the responsibility.
14. Save your work.

Related Topics

For information on adding sub menus to responsibilities, see: *Oracle Applications System Administrator Guide.*

Enable Additional Information Column

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

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

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

Related Topics

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

Add Logos

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

To add a logo to scorecards:

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

   The image can be any .GIF or .JPG file. The optimal size for the image is 340 x 100.
4. Click OK to save your changes.

Filter Common Dimensions

Designers can filter the scorecard by the common dimensions used in that scorecard. You can further filter the scorecard so that only certain common dimensions are displayed for each user. For example, you can create a scorecard for regional managers and filter the scorecard by common dimensions that are relevant to those managers.

Common dimensions are any dimensions that are:

- Common to every Objective on the scorecard
- Have dimension objects listed in *the same order*.
- Are defined as parent-child dimensions or are independent dimensions that are the only dimension available.

Any objectives that are linked from that scorecard also display only the filtered dimensions.

You can also filter the *dimension objects* displayed in a scorecard, if you want to show a set of data available for that dimension. For example, you can display the values for a specific region.

Dimension object filters override the common dimension filters. Therefore if the dimension object filter is by region, the common dimensions will not display region as an option.

To filter common dimensions:

1. In BSC Builder, navigate to the scorecard.
2. Click the List button.
3. Enable the dimensions that you want users to be able to filter by. You cannot select a child dimension without fist selecting the parent dimension.

   Dimensions are listed using the dimension table name.
4. View the scorecard using the Performance Management Designer responsibility to ensure that the filter was applied.

To filter dimension objects:

1. In BSC Builder, navigate to the scorecard.
2. Click the Filtering button.
3. Select the dimension and dimension values you want to filter the scorecard by.
4. Choose OK to save your work.

5. View the scorecard using the Performance Management Designer responsibility to ensure that the filter was applied.

Limit Number of Dimension Values

To limit the maximum number of dimension values displayed in a scorecard, ask the administrator to set up the Advanced UI Features option as part of the global setup for Balanced Scorecard.

Related Topics

Global Setup, page 6- 1

Set Up Alarms if Performance is Above 100%

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

To set up alarms if performance is above 100%:

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

Set Up Pie Chart

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

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

To specify the number of Pie Chart slices to display:

1. In BSC Builder, right-click on a Balanced Scorecard system.
2. From the popup menu, select Define Default Graph options.
3. Choose one of the following graph options:
   - **All:** Displays all the slices in the pie chart
   - **Slices:**

   Defines the maximum number of slices displayed in the pie chart. Enter the maximum number of slices in the field.
4. Click OK to save your work.

Related Topics

Oracle Balanced Scorecard User Guide

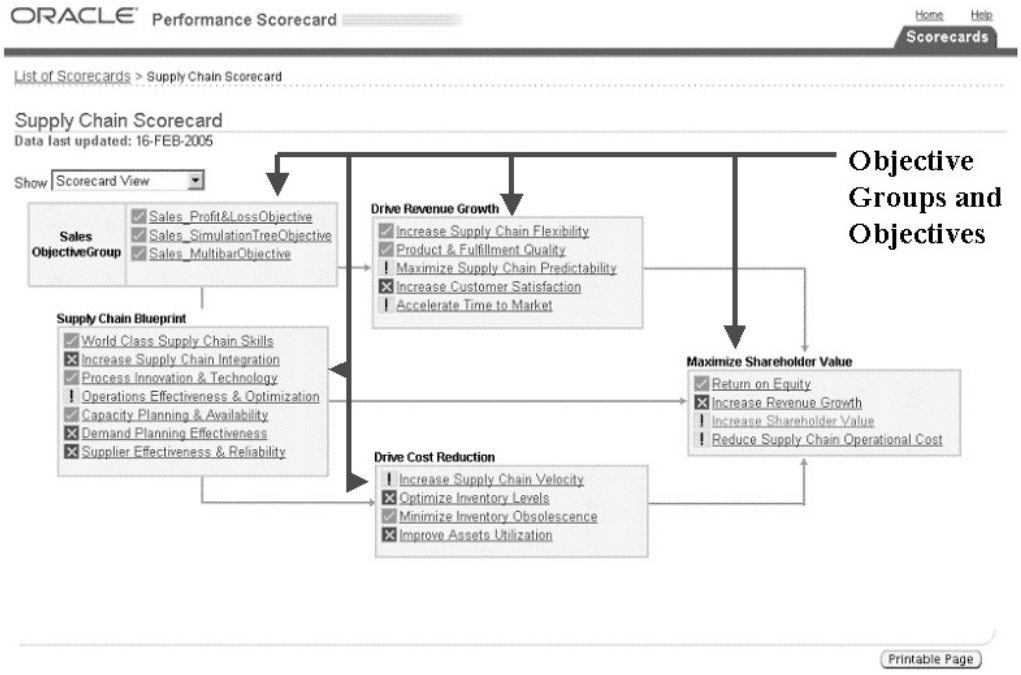
3

Objectives

This chapter covers the following topics:

- Overview of Creating Objectives
- Create Objectives
- Create KPIs
- Create Single Bar KPIs
- Create Multiple Bar KPIs
- Create Simulation Trees
- Create Profit and Loss
- Create Data Source Groups
- Create Dimensions

Overview of Creating Objectives



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

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

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

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

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

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

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

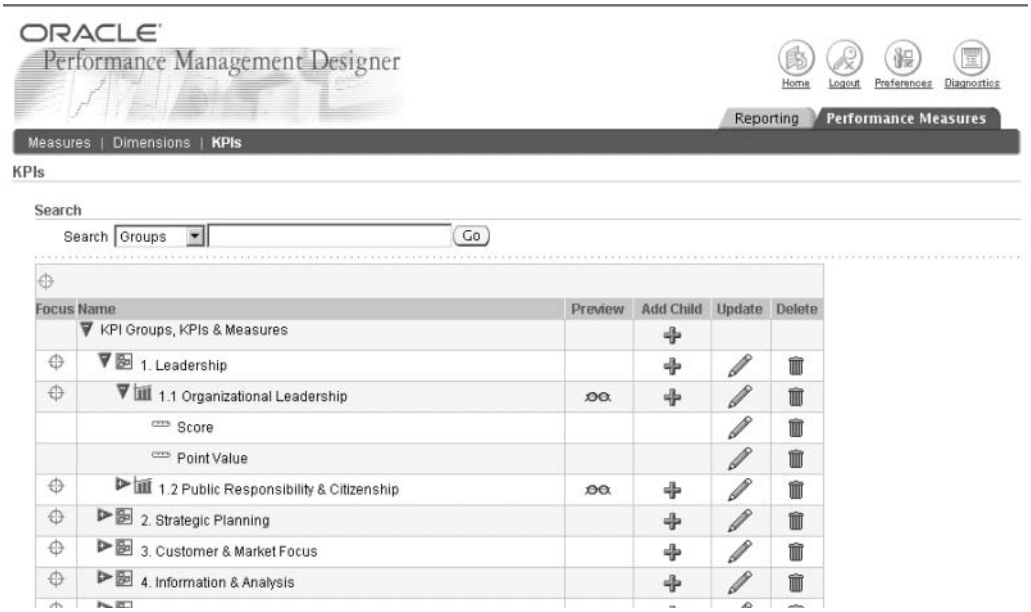
The following are all the objective-related procedures that the designer or administrator can perform.

1. Create Objectives, page 3- 3
2. Create KPIs, page 3- 8
3. Create Single Bar KPIs, page 3- 9
4. Create Multiple Bar KPIs, page 3-14
5. Create Simulation Trees, page 3-14
6. Create Profit and Loss Indicators, page 3-15
7. Create Data Source Groups, page 3-15
8. Create Dimensions, page 3-16

Related Topics

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

Create Objectives



Create objectives to organize the KPIs that you want to use to measure performance.

When you create an objective, start by creating an *objective group*. Each objective belongs to an objective group. Then, assign KPIs to the objective. Once you've assigned the KPIs, you can define the attributes of the objective by specifying which KPI is the default KPI for the objective. The default objective drives the alarm color for the objective.

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

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

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

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

Prerequisites

- ❒ Create KPIs, page 3- 8
- ❒ Create Dimensions, page 3-16

To create an objective group and objective:

1. Navigate to Performance Measures > Objectives.
2. At the top level of the objective hierarchy, click Add Child.

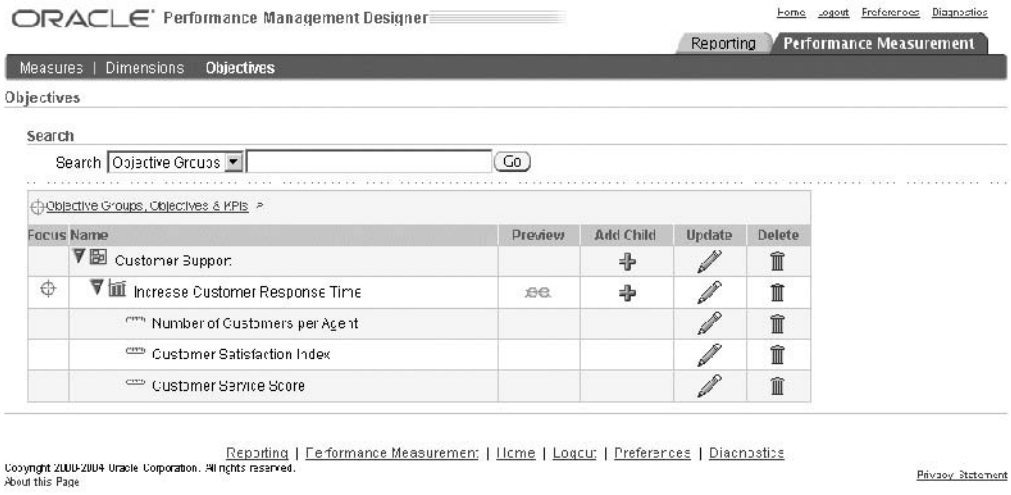
3. Enter a name and description for the objective group.
4. Click Apply to save your work.
5. To add an objective to the objective group, select the objective group and click Add Child.
6. Enter a name and description for the objective.
7. Click Apply to save your work.

To add KPIs to an objective:

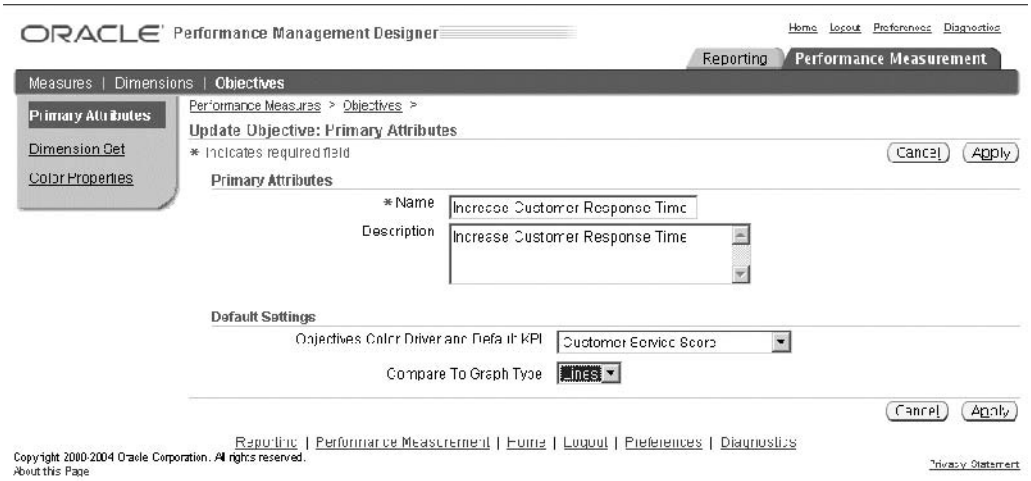
1. Select the objective and click Add Child.
2. Select the KPI and click Continue.
3. Change the display name of the KPI or add a description if required.
4. Click Finish to save your work.

To define the attributes of an objective:

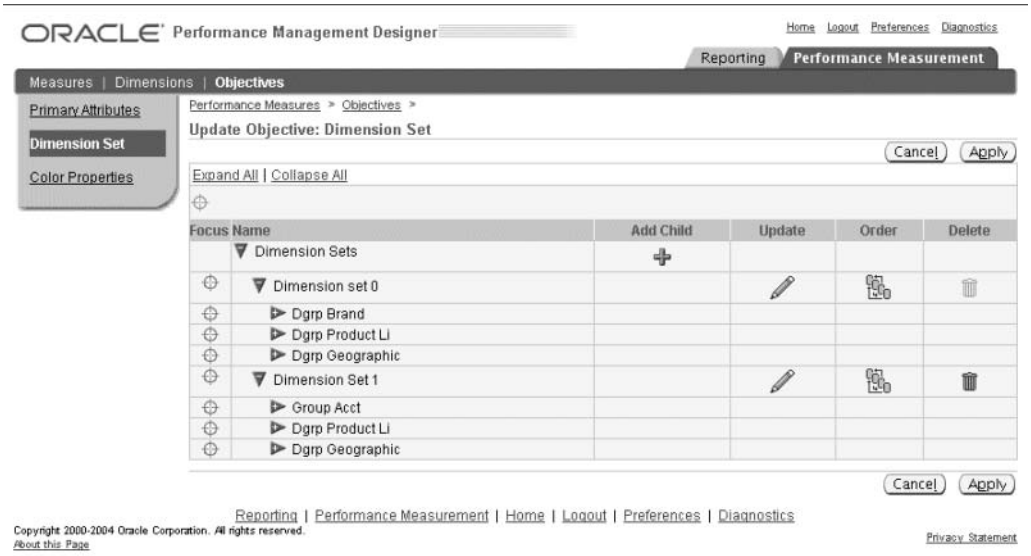
1. Select the objective and click Update.



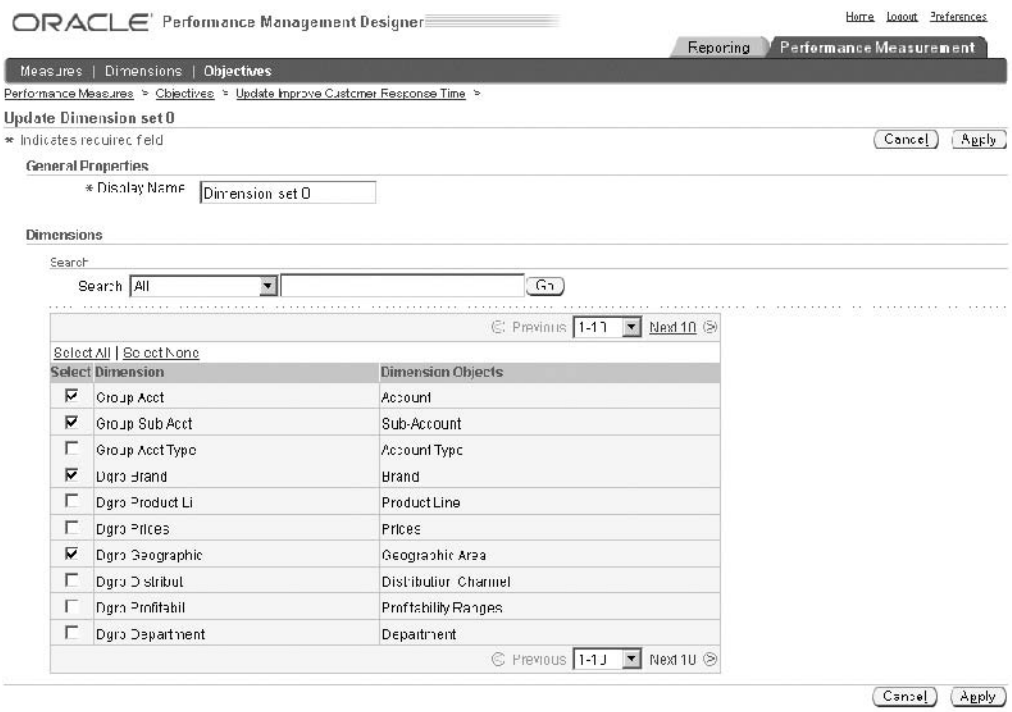
2. Select the default KPI for the Objective. The default KPI drives the alarm color for the objective. You can also modify the other primary attributes as required.



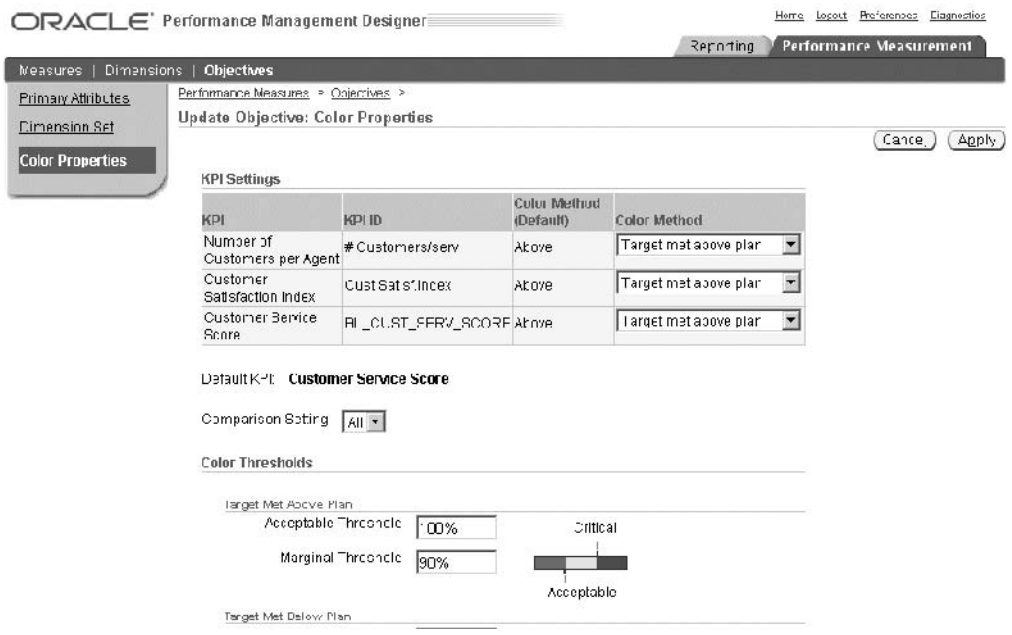
3. Select the default comparison graph for the objective. You can choose Lines or Bars.
4. Navigate to Define Dimension Sets. By default all objectives have one dimension set, "Dimension set 0", included.



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



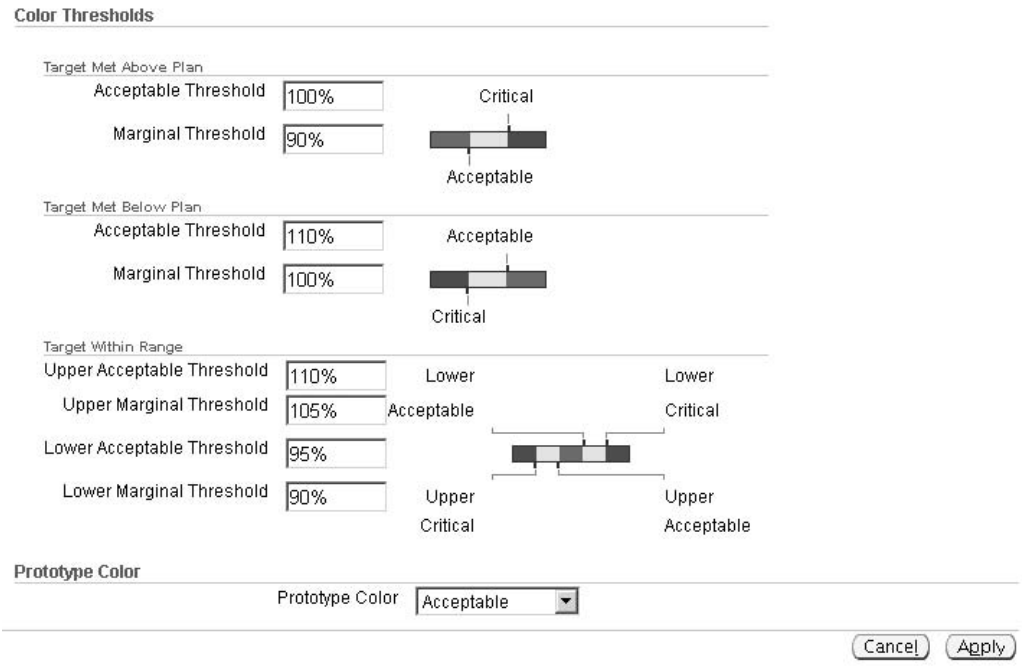
7. Select the dimensions that you want to add to the dimension set. You can also change the dimension set name if required.
8. Navigate to Color Properties.



9. For each KPI, choose a method for determining the alarm color for that KPI. The available methods are:

- Target met above plan
- Target met below plan
- Target met within ranges

10. Define the color thresholds for each color method.



Define the color thresholds as follows:

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

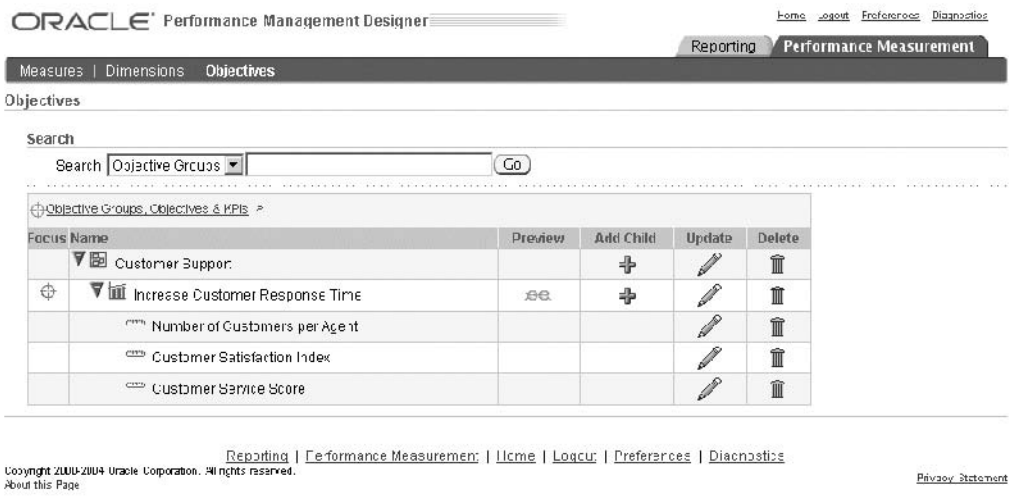
Anything that falls between the specified thresholds is considered at risk, or "yellow".

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

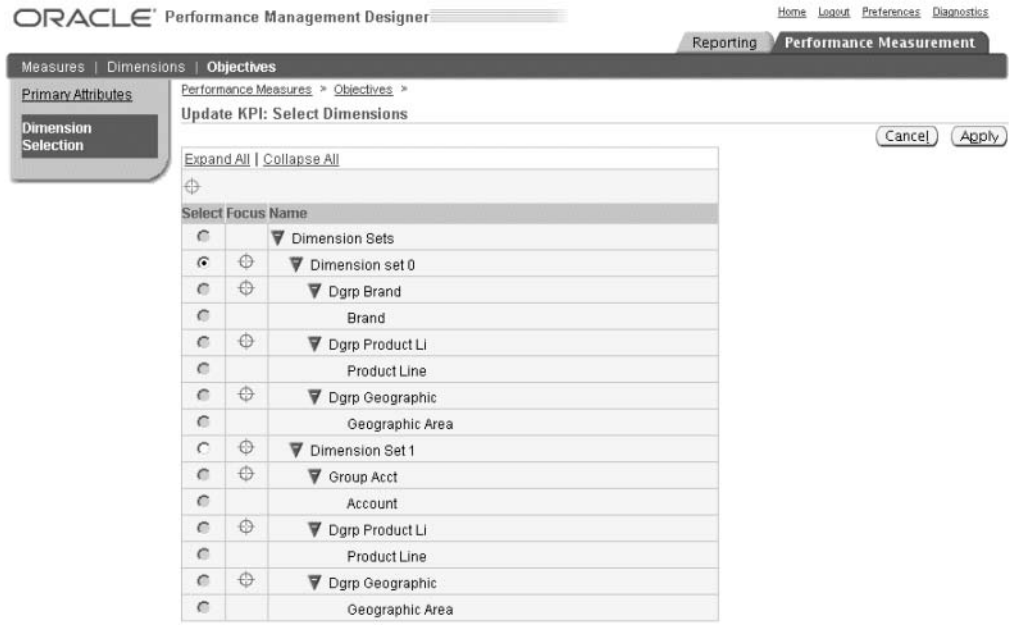
11. Define a color for prototype data as required. The default color is Acceptable.
12. Click Apply to save your work.

To define the attributes of each KPI:

1. Select the KPI and click Update.



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



4. Click Apply to save your work.

Create KPIs

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

You can create four different types of KPIs:

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

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

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

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

1. Create Single Bar KPIs
2. Create Multiple Bar KPIs
3. Create Simulation Tree
4. Create Profit and Loss

Related Topics

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

Create Single Bar KPIs

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

Prerequisites

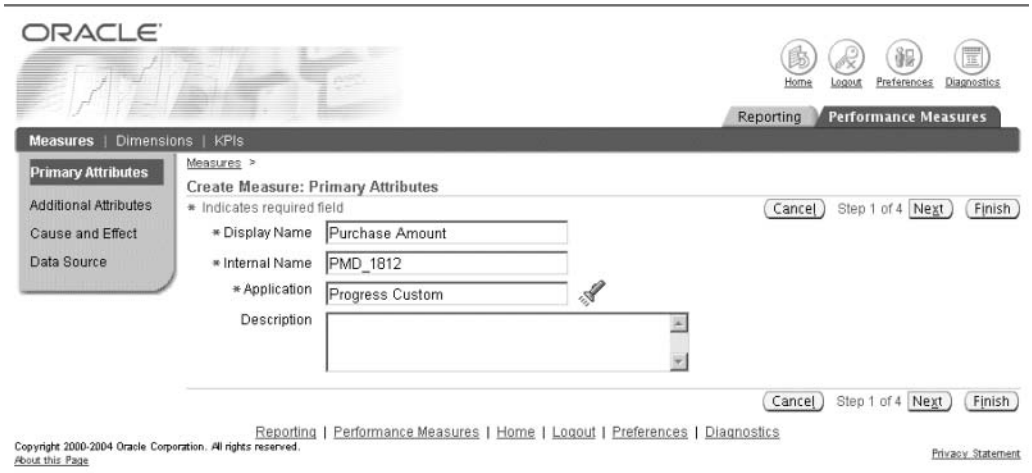
❒ Create data source groups (optional), page 3-15

To create single bar KPIs:

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

Primary Attributes

4. Enter a display name.



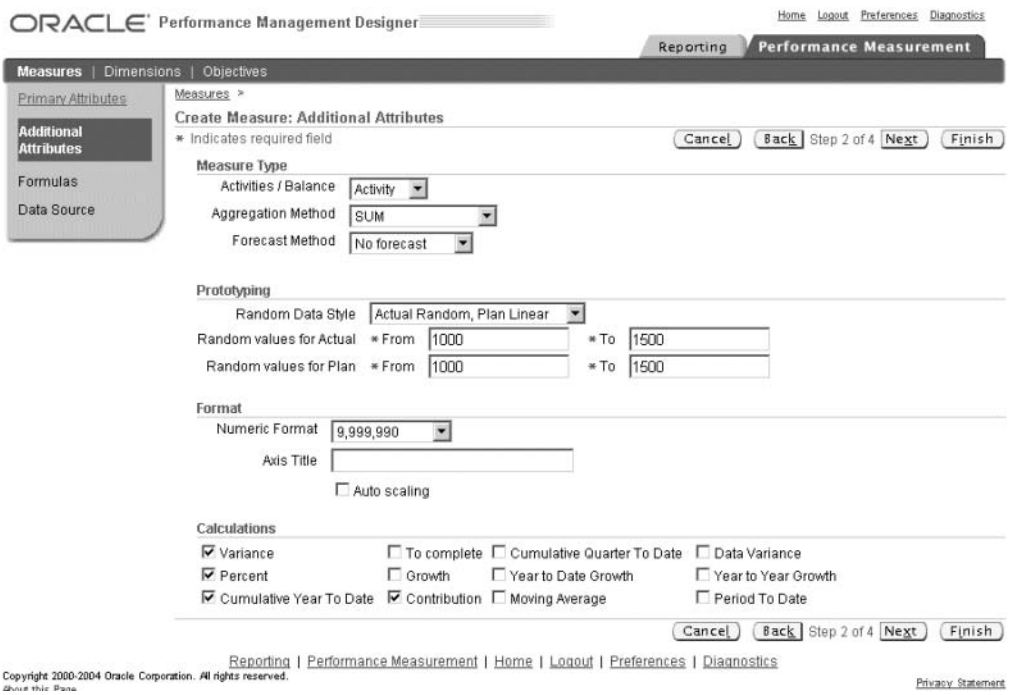
5. Change the internal name field, if required. The internal name must be unique.
6. Chose an application.

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

   Click Next to proceed.

Additional Attributes

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



9. Select an aggregation method:
   - AVG
   - AVG (Lowest Level)

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

     If you choose AVG (Lowest Level), select "Apply rollup to Formula" so the KPI will be calculated for an overall aggregation only.
   - MAX
   - MIN
   - SUM
10. Select a forecast method.

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

      Load forecast data from a third-party application.
    - Moving Average

      Forecasts are based on a moving average for the past year (or less time periods if a year of data does not exist). The moving average includes actual and past forecasted data.
    - No forecast

- Plan-based

  Forecasts are based on the average performance to plan for the last three months and applies that ratio to the plan for each of the succeeding periods.

- 3-month average performance (no null projection)

11. Define the prototype settings.

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

12. Define the numeric format.

13. Define the axis title.

    When you define the title, consider the following:

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

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

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

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

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

    Click Next to proceed.

Formula

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

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

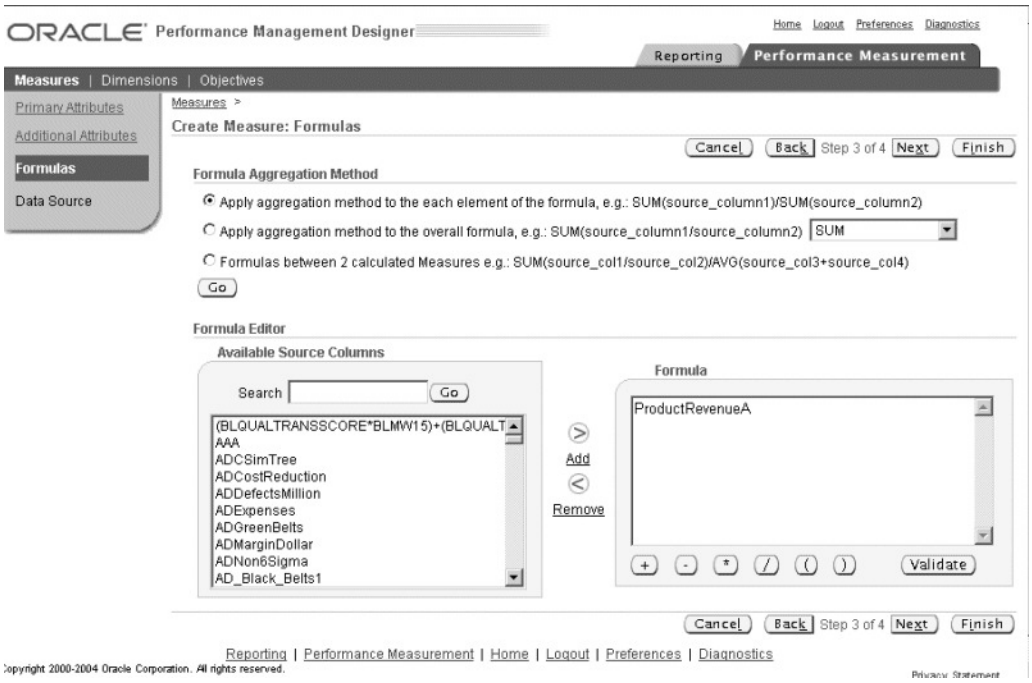
      In this option, the results are calculated for each dimension object and then the formula is applied to the results.

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

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

    - **Formulas between two calculated measures**

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



17. If you select "Formulas between two calculated measures", use the formula editor to combine two or more calculated KPIs. You can select from any existing columns or KPIs.
18. Click Validate to ensure that the formula you created is valid. Click Next to proceed.

Data Source

19. Select the Data Source.

20. Select the Source Column for the KPI.
21. Select the Compare To column for the KPI.
22. If you want to specify a detailed report for the KPI, select a report.

    Viewers will be able to drill to this detailed report from the Objective report.
23. If you implemented Oracle Daily Business Intelligence and you want the KPI to link to the specified detail report when it is used in a Daily Business Intelligence dashboard, then check the Enable Detailed Report in KPI Region checkbox.
24. Click Finish to save your work.

Related Topics

"Calculations" in *Oracle Balanced Scorecard User Guide*

"KPI Region" in *Oracle Daily Business Intelligence Implementation Guide*

Create Multiple Bar KPIs

Multiple bar KPIs display multiple data series, or measures, across time. Use multiple bar KPIs to break data into subcomponents. For example, if you want to view Customer Deposits by account types, such as Checking, Savings, and CDs.

To create multiple bar KPIs:

1. Log into Oracle Applications using the BSC Designer responsibility.
2. Right-click on the Balanced Scorecard system and select New Indicator.
3. Select Multiple Bars.
4. Right-click on the new indicator, select Edit Caption.
5. Enter a name for the KPI.
6. Modify the primary attributes as required.
7. Select the Dimension Set for the KPI.
8. Set the color properties for the KPI.
9. Save your work.

Create Simulation Trees

Simulation trees display "what-if" scenarios. A simulation tree allows you to simulate the impact of changes to KPIs and define leading and lagging KPIs. For example, if you increase the Number of Orders Shipped on Time, will it increase Customer Satisfaction Ratings?

To create a simulation tree:

1. Log into Oracle Applications using the BSC Designer responsibility.
2. Right-click on the Balanced Scorecard system and select New Indicator.
3. Select Simulation Tree.
4. Right-click on the new indicator, select Edit Caption.

5. Enter a name for the simulation tree.
6. Modify the primary attributes as required.
7. Select Dimension Set 0.
8. Set the color properties for each node.
9. Save your work.

Create Profit and Loss

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

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

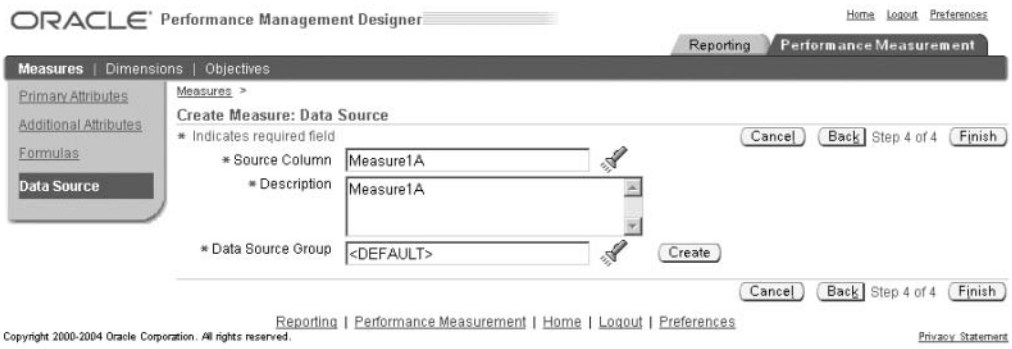
Create Data Source Groups

If you have several KPIs that have data for the same periods, create a data source group.

When you create a data source group, the data for all the KPIs in the group is written to the same table. Data source groups make it easier for the administrator to input and manage data.

To create data source groups:

1. Log into Oracle Applications using the Performance Management Designer responsibility.
2. Navigate to Performance Measurement > Measures > Data Source.
3. Next to the Data Source field, click Create.



4. Enter a name for the data source group.

The KPI is assigned to the new data source group.

5. You can assign a second measure to the same data source group, by selecting the new Data Source Group from the Data Source Group field.
6. Click Apply to save your work.

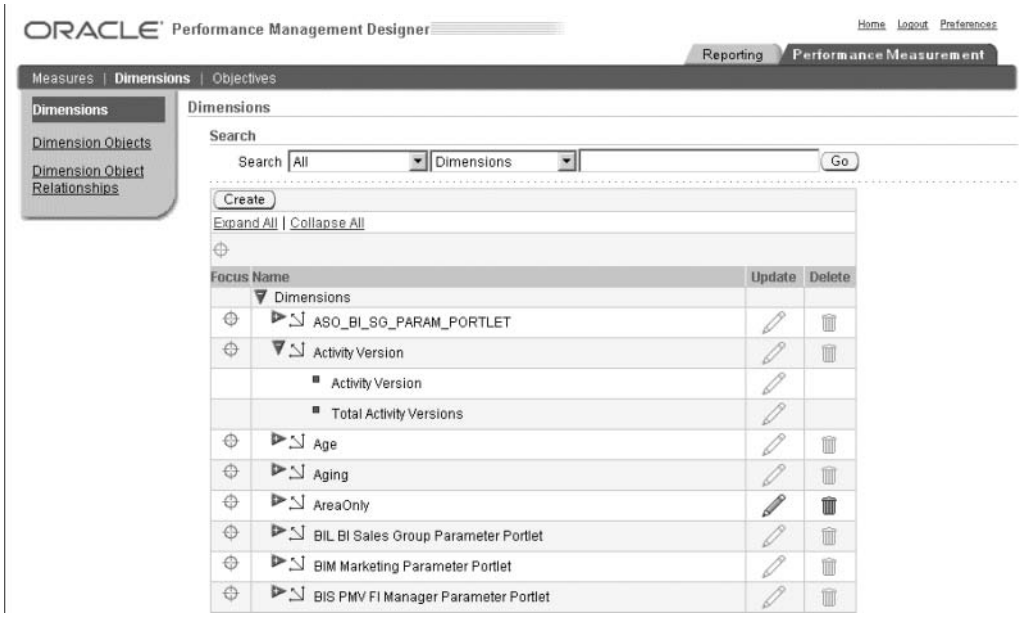
Create Dimensions

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

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

To create dimensions:

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



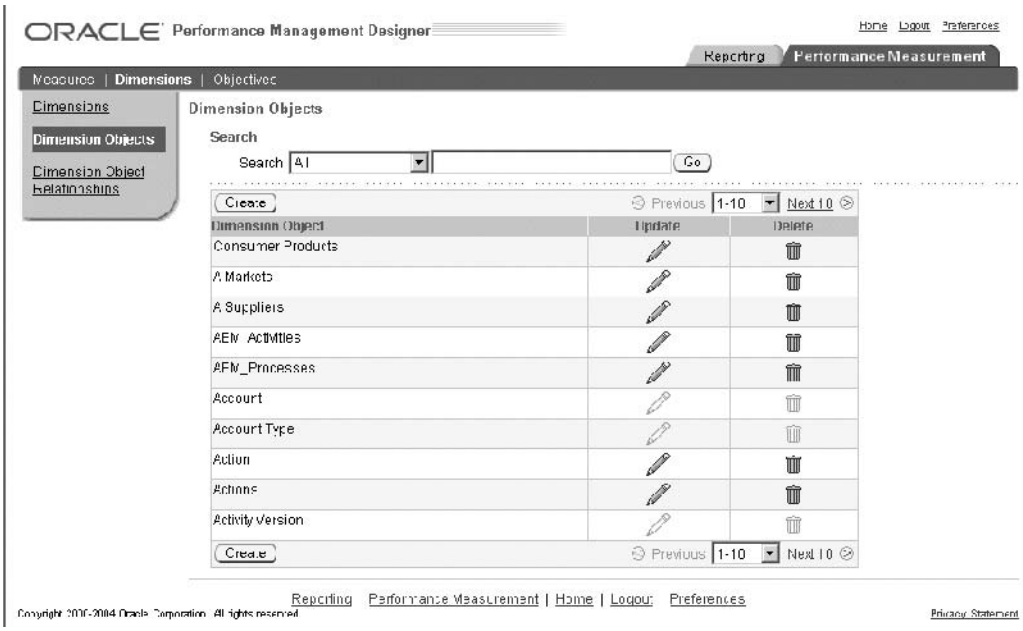
3. Click Create.
4. Enter a Display Name. A unique internal name is assigned to the dimension.
5. Enter a Description.
6. If there are existing dimension objects, you can add dimension objects to the dimension.

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

7. Click Apply to save your work.

To create dimension objects:

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



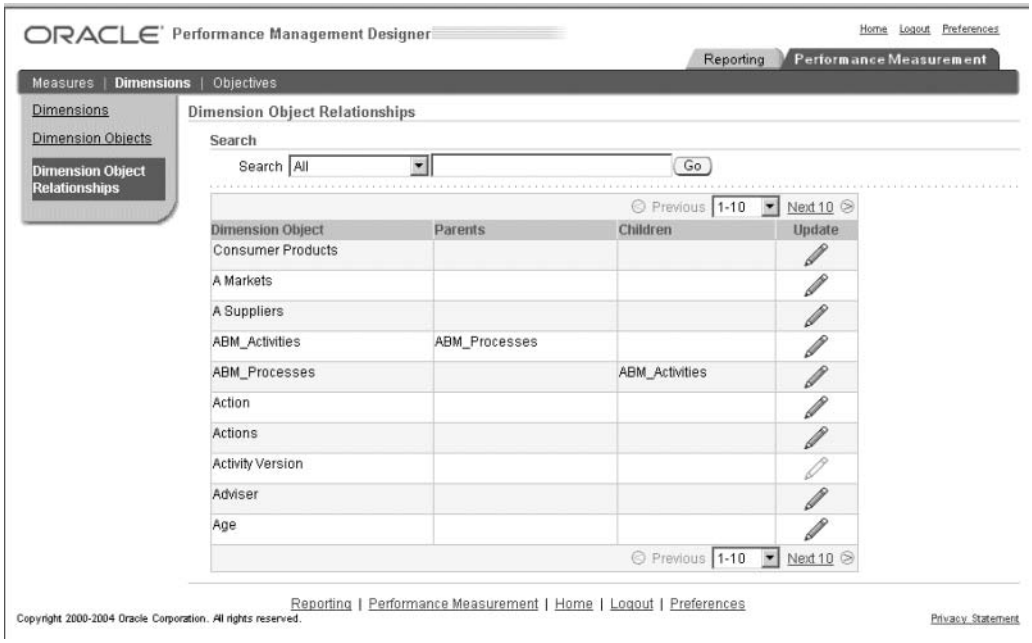
3. Click Create Dimension Object.
4. Enter a Display Name. A unique internal name is assigned to the Dimension Object.
5. Enter a Description.
6. Add this dimension object to a dimension, as required. Click Next to proceed.
7. Enter a display label for the "ALL" option for this dimension object. The default value is ALL.
8. Enter a display label for the View-By option for this dimension object. The default value is COMPARISON.
9. Enter a prefix value for prototype data. If nothing is entered it will default to an abbreviation of the display name with any blank spaces removed.

10. Choose the sort order for the dimension object. You can sort by Description or User Code.
11. Choose a sort order for Comparison data. You can sort by Descending, Ascending, or in the same order as the Dimension Object Value. Click Next to proceed.
12. Enter a source name for the dimension object. The source is the table that contains the dimension object values. If you do not enter a source name, then the source is generated automatically.
13. Enter a Source Column. If you don't enter a source column, the column name is generated automatically.
14. Enter a Maximum Code Size for the dimension object values ID. The default value is 5.
15. Enter a Maximum Name Size for the dimension object values. The default size is 15.

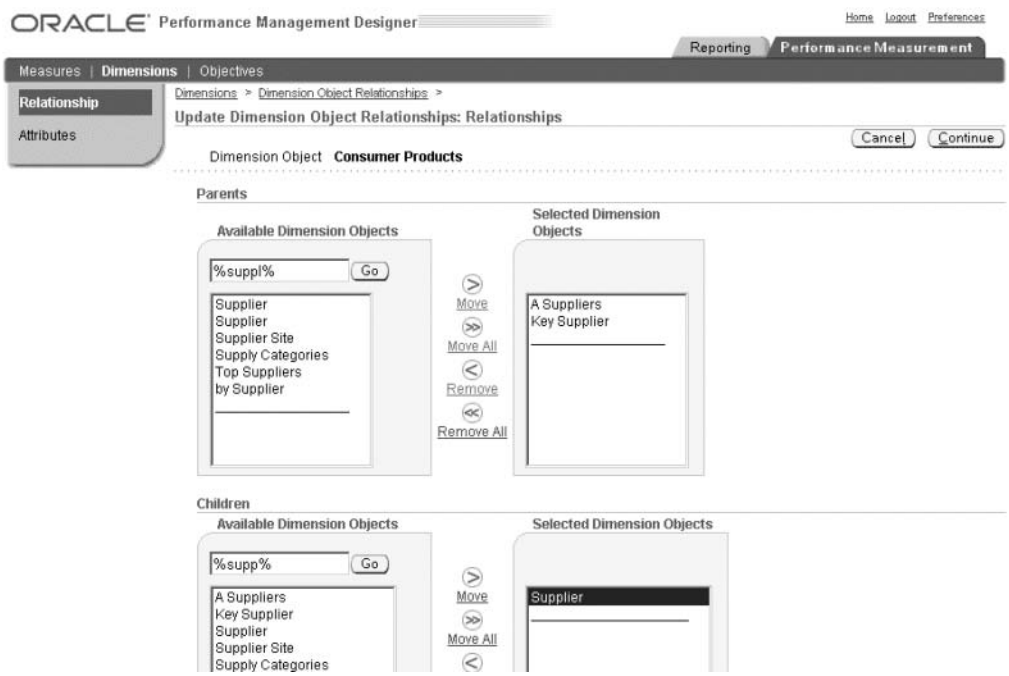
> **Note:** The system will display pre-seeded Dimension Objects. These dimension objects cannot be changed or deleted.

To create dimension object relationships:

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



3. Query the dimension objects that you want to define the relationship for.



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

4

Portlets

This chapter covers the following topics:

- Balanced Scorecard Portlets
- Configure a Custom View Portlet
- Grant Access to a Balanced Scorecard Portlet

Balanced Scorecard Portlets

Use the Balanced Scorecard Manager or the Balanced Scorecard Designer responsibility to add one or more Balanced Scorecard portlets to an Oracle Applications personal home page (PHP) or to an Oracle Portal page.

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

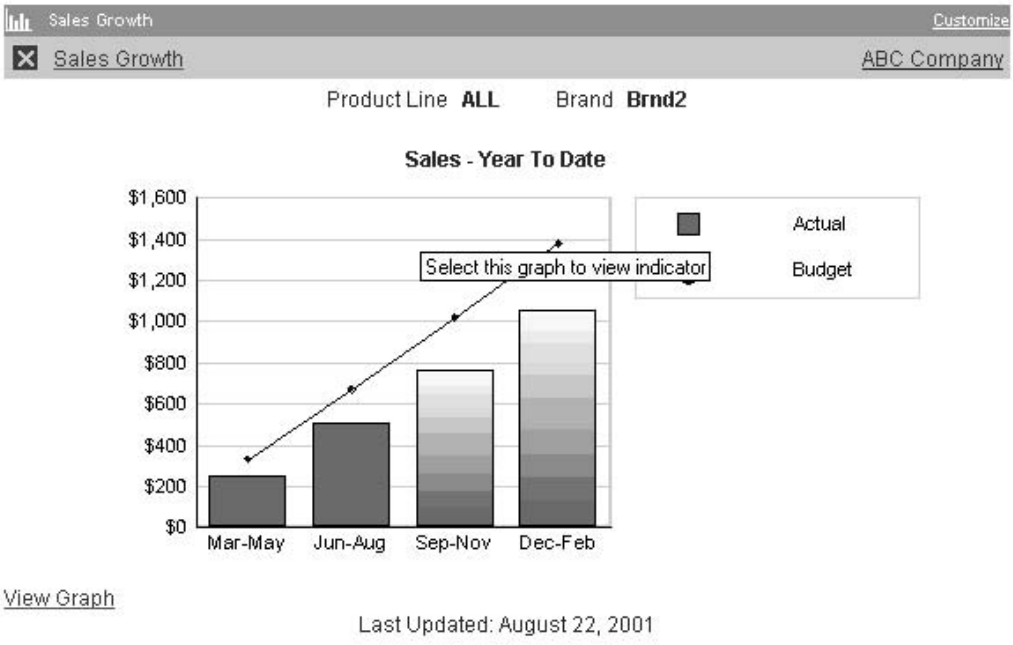
There are three types of Balanced Scorecard portlets:

- Indicator Graph Portlet, page 4- 1
- List of Indicators Portlet, page 4- 2
- Custom View Portlet, page 4- 3

Indicator Graph Portlet

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

Indicator Graph Portlet



This type of portlet has the following characteristics:

- You can add one portlet for each indicator.
- The indicator graph portlet only displays the default indicator settings. The indicator settings are displayed on the portlet.
- If the indicator graph is a comparison graph, the graph displays the period.
- You cannot create an indicator graph for simulation trees.
- Click the indicator name, "More" or "View Graph" links to view the complete indicator report.
- Click the scorecard name to view the default scorecard view for the indicator.

List of Indicators Portlet

Use the List of Indicator portlet to display a list of indicators from a scorecard. The list can include all of the indicators in the scorecard, or can be a custom-defined subset of the indicators.

The list of indicators portlet has the following characteristics:

- Click the scorecard name to view the scorecard's main view.
- Click the indicator name to view the indicator report.
- You can configure the portlet to display the following information for each indicator:
  - Indicator Group
  - Actual
  - Plan
  - Variation

- Percent of Plan

Custom View Portlet

Use the Custom View portlet to display a scorecard custom view.

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

You must grant access to the custom view portlet by attaching it to a menu.

Configure a Custom View Portlet

When you add a custom view portlet to your portal, you must also select which custom view you want to display in the portlet.

Check with the scorecard owner to ensure that the portlet view is the correct size to display in a portlet.

To configure a custom view portlet:

1. Add a Balanced Scorecard Custom View Portlet type to your Portal page.
2. Select Customize.
3. Select your Responsibility.
4. Choose a Scorecard available for your responsibility.
5. Choose a Custom View for the scorecard.
6. Click Finish to save your work.

Related Topics

Oracle Portal documentation

Grant Access to a Balanced Scorecard Portlet

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

To grant access to a Balanced Scorecard portlet:

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

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

Balanced Scorecard Portlet Prompts, Functions and Descriptions

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

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

Related Topics

Oracle Applications System Administrator Guide

5

Security

This chapter covers the following topics:

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

Assign Responsibilities to Users

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

The following is the list of preseeded Balanced Scorecard responsibilities:

- **Performance Manager Designer:** Enables access to all of the scorecard design features. With this responsibility, you can create scorecards, views, objectives, KPIs, and dimensions.
- **Performance Management Administrator:** Enables access to all of the administration features. With this responsibility you can set up Balanced Scorecard, generated database objects, load data, and manage sessions.
- **Performance Management Database Administrator:** Enables access to only the database-related administration features. With this responsibility you can manage user sessions and generate database objects.
- **Balanced Scorecard Manager:** Enables access to the features of the Performance Management Designer and the Performance Management User responsibilities as well access to managing sessions. This responsibility also provides access to the Balanced Scorecard Architect functionality.
- **Balanced Scorecard Designer:** Enables access to the Performance Management Designer responsibility and access to the Balanced Scorecard Architect functionality.
- **Balanced Scorecard Supervisor:** Enables access to the supervisor-administration features.
- **Performance Management User:** Enables access to view scorecards.

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

Related Topics

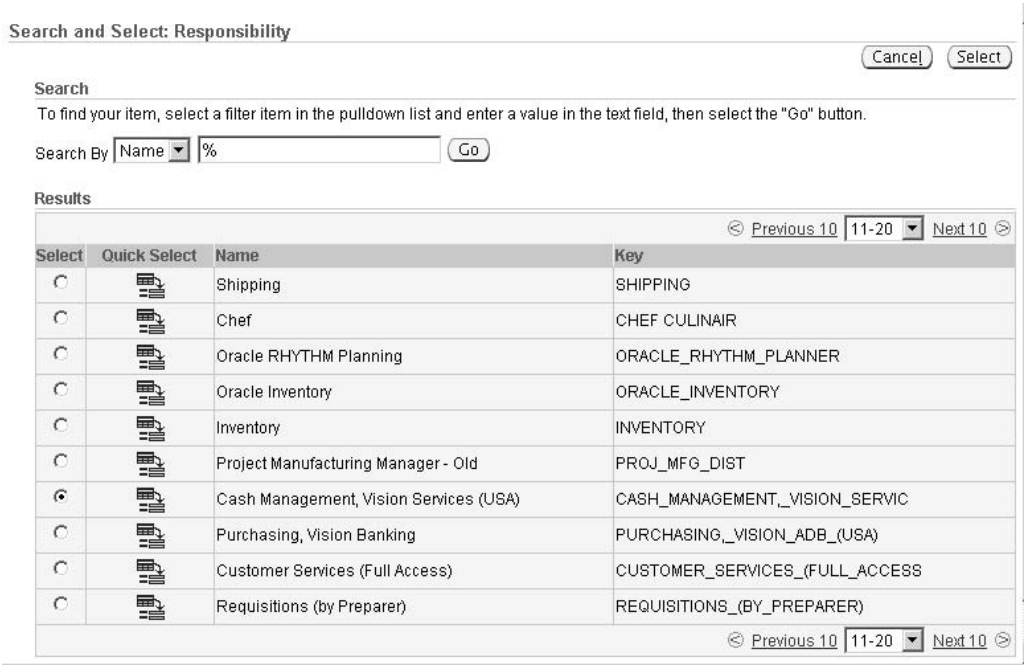
For information on how to assign responsibilities to Oracle Applications users, see: *Oracle Applications System Administrators Guide - Security*.

Assign Scorecards to Users

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

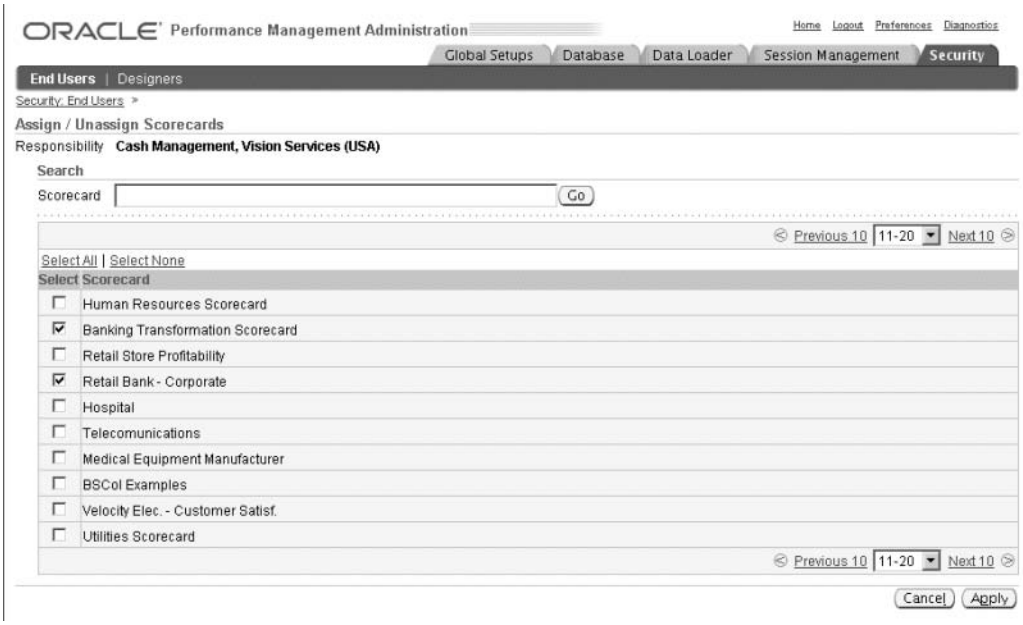
To assign scorecards to users:

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



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

4. Click Assign/Unassign.
5. Query the scorecards that you want to add to the responsibility.
6. Enable the check box next to each scorecard that you want to assign to the responsibility.



7. Click Apply to save your work.

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

Assign Roles to Designers

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

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

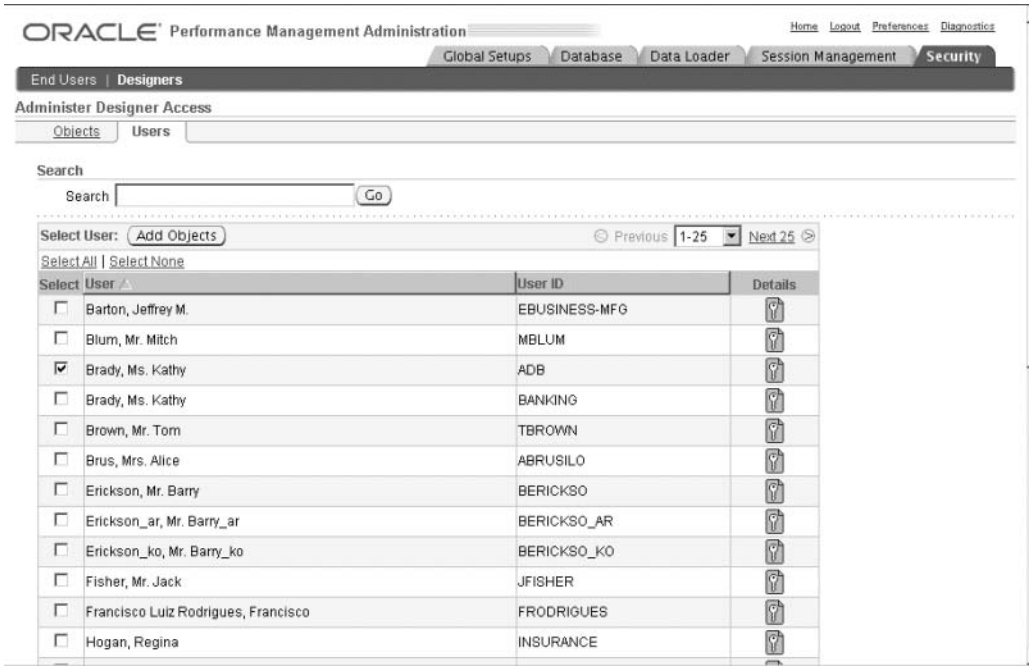
If a designer created a scorecard, the designer is automatically assigned the Administrator role. All other designers are automatically assigned the User role.

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

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

To assign roles to designers:

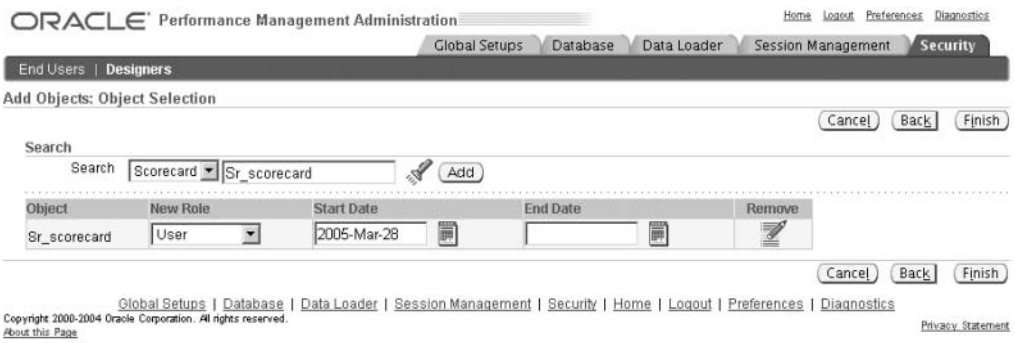
1. Log into Oracle Applications using the Performance Management Administrator responsibility. You can log in using the Performance Management Designer responsibility if you are the scorecard designer.
2. Navigate to Security > Designers.
3. Select the Objects or the Designers subtab.
4. Query and select the scorecard or designer.



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

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

6. Query and select the responsibilities or scorecards that you want to assign. Click Add.



7. Assign a role to the responsibility for the scorecard. The default role is User.
8. Specify a Start Date for the role. If you want the role to expire in the future, enter an End Date; otherwise leave this field blank.
9. Click Finish to save your work.

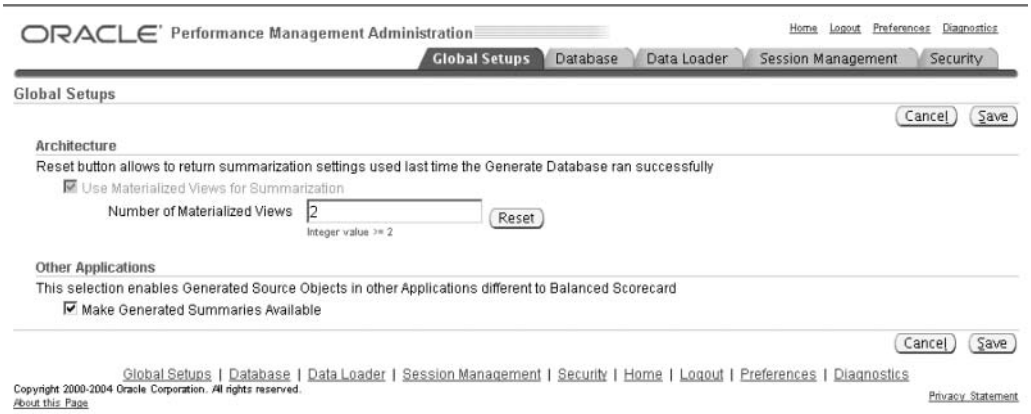
Related Topics

Oracle Applications System Administrator's Guide - Security.

6

Set Up

Set Up Global Parameters



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

- **Architecture--Use Materialized Views for Summarization:** Check this option if you want to use Materialized View Architecture.

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

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

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

If this is the first time you are enabling the materialized view architecture, it is recommended that you back up your data before you run the Generate Database request.

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

- **Other Applications--Make Generated Summaries Available:** Check this option if you want to the dimensions and KPIs that you create in Balanced Scorecard to be available in other applications. For example, you can add Balanced Scorecard KPIs to a Daily Business Intelligence dashboard or report.

7

Generate Database

This chapter covers the following topics:

- Overview of Generating the Database
- View Current Status
- Run the Generate Database Process
- View Generated Documentation
- Monitor Requests
- Troubleshooting

Overview of Generating the Database

After scorecard design is complete, run the Generate Database request to generate the database objects needed to support the objectives.

The Generate Database request generates the input tables and summarization levels for each objective. The Generate Database request attempts to optimizes the database objects required, so several objectives may share the same underlying objects.

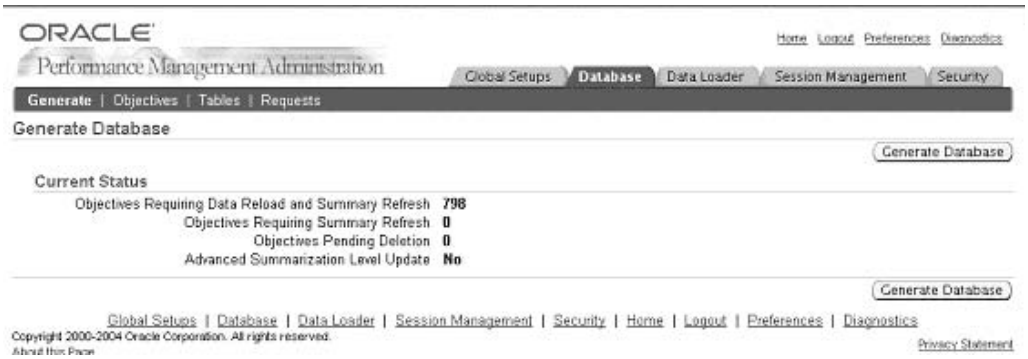
Run the process each time the Designer modifies an objective and you want to update the scorecards to reflect changes made. Also, run this process if you change the architecture method.

The following table lists the table objects that are generated by the Generate Database process. Note that you must use the Data Load process to populate the dimension tables and input tables with data. You must also use the Data Load process to populate the system tables for precalculated KPIs. All other tables are automatically generated and populated by Balanced Scorecard.

Generated Tables

Table	Description
Dimension Tables (BSC_D)	Contains dimension level values. There is normally one dimension table for each dimension. Use the Data Load process to populate these tables with data.
Input Tables (BSC_I)	Contains data used to support KPIs and scorecards. Use the Data Load process to populate these tables with data.
System Tables (BSC_S)	Contains the calculated and de-normalized data used to support KPIs and scorecards. For standard KPIs, these tables are automatically populated when you load the input tables. For precalculated KPIs, use the Data Load process to populate these tables with data.
Historical Tables (BSC_BAK)	Contains the historical data for each KPI and scorecard. These tables are automatically populated when you load the input tables. Data in these tables can be deleted by the administrator or can be deleted the next time the Data Load process is run.
Temporary Tables (BSC_T)	Contains temporary data.

View Current Status



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

- **Objectives Requiring Data Reload and Summary Refresh.** The number of objectives that require changes to the structure of their input tables or summarization levels. If you have objectives that fall into this category, you must reload data for the affected objectives.
- **Objectives Requiring Summary Refresh.** The number of objectives that require data to be refreshed. You do not need to reload data for these objectives. Instead, you must run the recalculate process when you perform the data load, so that the data is updated accordingly.
- **Objectives Pending Deletion.** The number of objectives that are in production mode, but that have been flagged for deletion. The input tables and summarization levels for these objectives will be removed. You do not need to run any additional processes in this case.

- **Advanced Summarization Level Update.** The number of summary levels has been modified. This flag triggers Generate Database to generate the appropriated number of materialized views for all objectives and once the process is executed. You do not need to reload data in this case.

Use this status to determine when and how frequently you need to run the Generate Database request.

To view the current status of the database:

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

Run the Generate Database Process

Run the Generate Database process to generate the database objects needed to support the objectives and scorecards. When you are ready to run the process, ensure that all Loader, Architect (including migration), and Designer sessions are closed. Users can continue to view scorecards; however, while the process is running users will receive a message indicating that the database is being updated. During this time, users will only be able to view scorecards and objectives with prototype data.

It is recommended that you review the scorecard design and approve it with your implementation team and objective stakeholders before you run the Generate Database process.

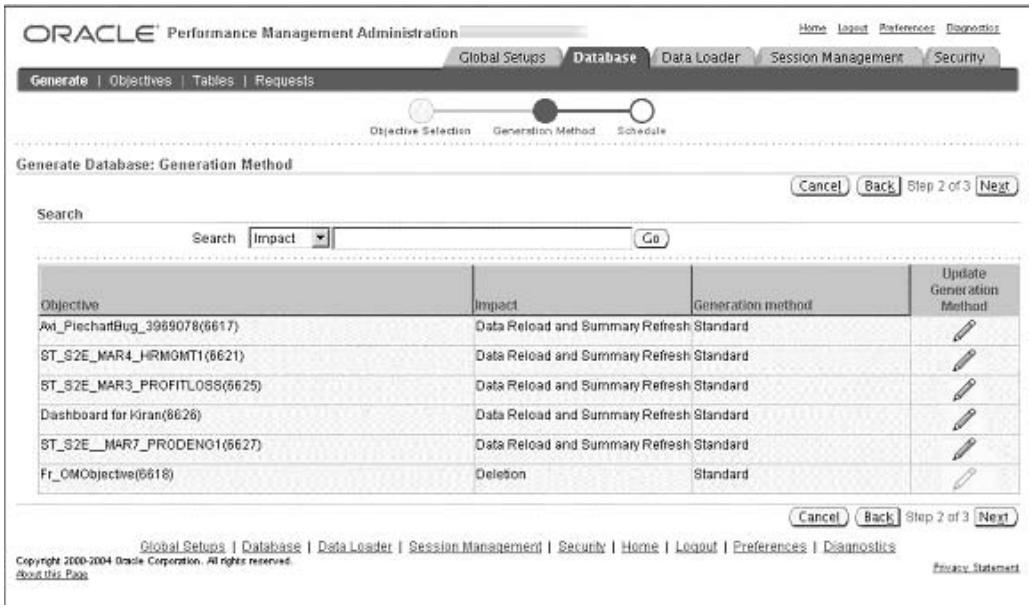
Prerequisites

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

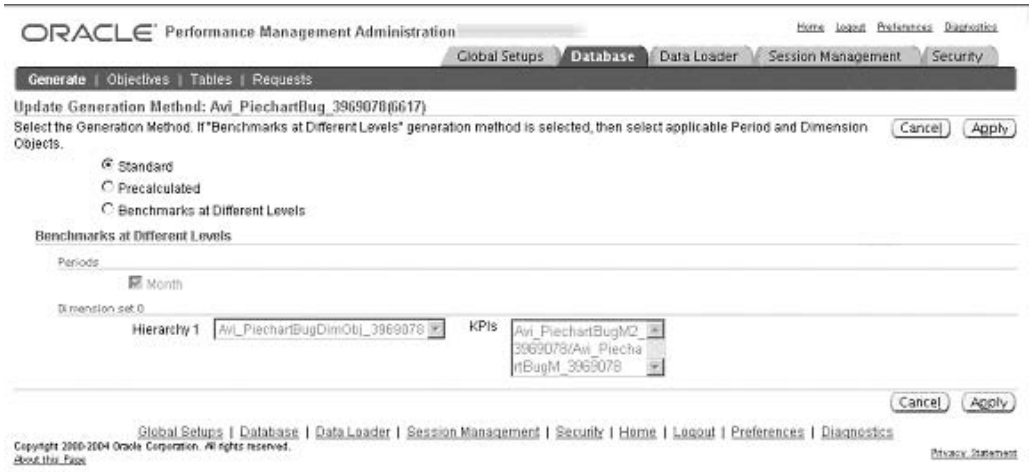
To run the Generate Database process:

1. Log into Oracle Applications using the Performance Management Administrator responsibility.
2. Navigate to Database > Generate.
3. Click Generate Database.
4. Choose one of the following options:
   - **Process all objectives.** Creates a backup of existing database objects, then truncates the existing objects and regenerates them. You must reload your data if you choose this option.
   - **Process only modified objectives.** Creates a backup of existing database objects, then updates the database objects that have pending modifications as well as any interrelated objects.

   The backup tables have the same name as the original table, but have the suffix "_BAK".
5. Click Next to view the list of Objectives.



6. For each objective, update the generation method, if required.



Possible generation methods are:

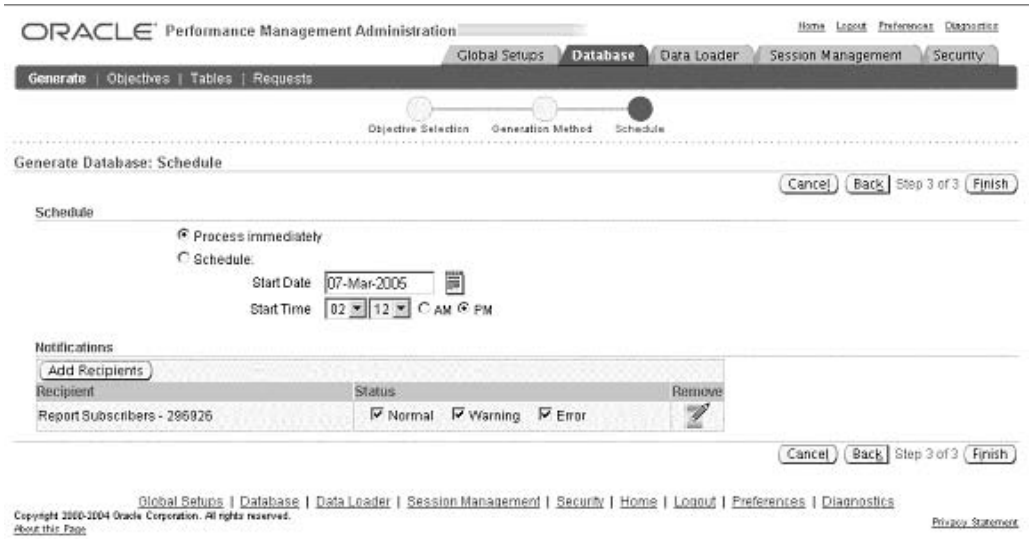
- **Standard.** Creates one input table for all data types (actual, plan, and any benchmark data) for all dimension combinations. The input table collects data at the lowest dimension level (for example, daily). Higher dimension levels are calculated by rolling up information from the lowest level. Designers are responsible for specifying a roll up method for each measure. This is the default generation method for all objectives.
- **Precalculated.** Creates a separate input table for each dimension combination. You can load all data types into each input table. If you choose this option, the system does not calculate Total values for the dimension combination. Instead, Administrators are responsible for loading this information.

- **Benchmarks at Different Levels.** In cases where plan and benchmark data is not summarized at the same level as the actual data (for example forecasts are monthly, whereas actual data is daily), users may use the "Benchmarks at Different Levels" generation method.

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

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

7. Schedule when you want to run the Generate Database process.



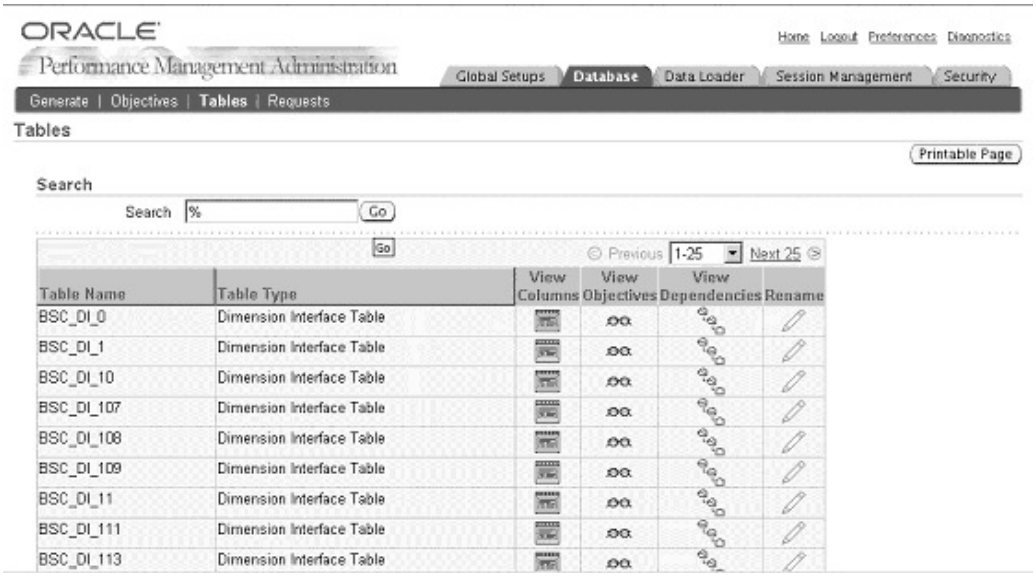
8. Set up notifications that you want to send when the request completes. The list of available recipients is based on Oracle Workflow. For each recipient you can specify which status they will receive a notification for: Normal, Warning, or Error.
9. Click Finish to submit the request.

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

Related Topics

For information on how to monitor requests, see: Monitor Requests, page 7- 7

View Generated Documentation



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

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

- Input Tables by Objective, or Objectives by Input Table
- Columns in each table
- Dependencies and hierarchies between tables
- Metadata Results

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

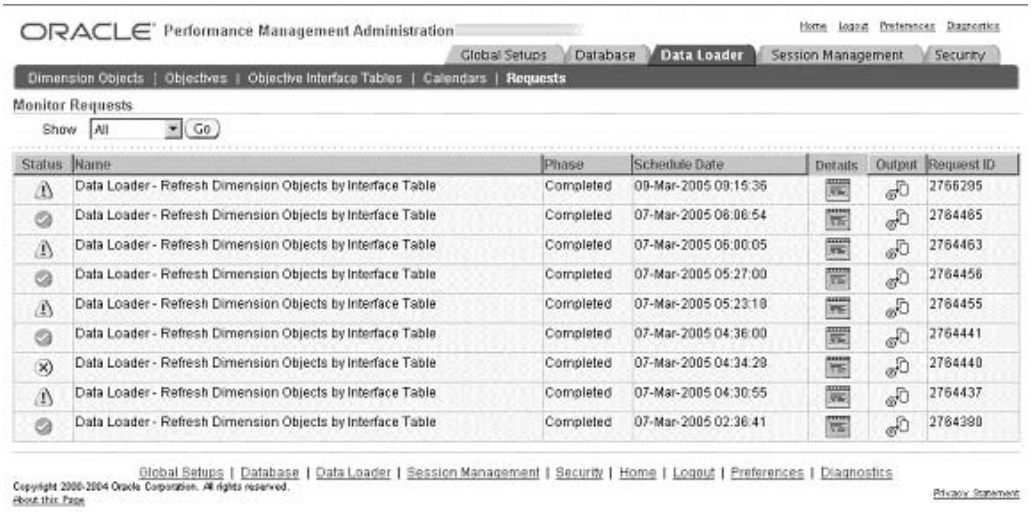
Table Type	View Columns	View Objectives	View Dependencies	Rename
Fact Input Tables	Yes	Yes	Yes	Yes
Dimension Input Tables	Yes	Yes	Yes	No
Base Tables	Yes	No	Yes	No
Dimension Tables	Yes	No	Yes	No
Summary Tables	Yes	No	Yes	No

You can also rename the input tables, if necessary. You can rename the input tables at anytime, even if a Generate Database request is pending. The system will update that pending request with the new table name.

In addition to being able to view the documentation online, the following documents are generated by the Generate Database request

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

Monitor Requests



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

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

Related Topics

Oracle Applications System Administrator Guide.

Troubleshooting

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

- **System is locked.**

To run the Generate Database request, the system must be unlocked. The Generate Database will lock the system and no one will be able to work with Balanced Scorecard until the process is finished. You can use the Session Monitor feature to see which users are currently on the system.

- **Another Generate Database process running.**

  If there is another Generate Database request already running, you cannot launch another request. Wait for the current request to complete before you launch a new Generate Database request. Use the Monitor Requests feature to see if there are any current or pending requests.

- **Objectives not assigned.**

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

- **Consistency issues.**

  If the Generate Database process finds any data consistency errors during processing, for example non-synchronized, shared KPIs, those errors will be listed in the log file.

- **Request completes with Warning or Error.**

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

8

Data Loader

This chapter covers the following topics:

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

Overview of Loading Data

After you run the Generate Database process, use the Data Loader process to load or refresh data for custom dimension objects, objectives, and objective interface tables.

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

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

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

Related Topics

"Initial and Incremental Request Sets" in the *Oracle Daily Business Intelligence Implementation Guide*.

Load Dimension Objects

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

- Enter data manually
- Load data from a file

- Load data using a program

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

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

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

Prerequisites

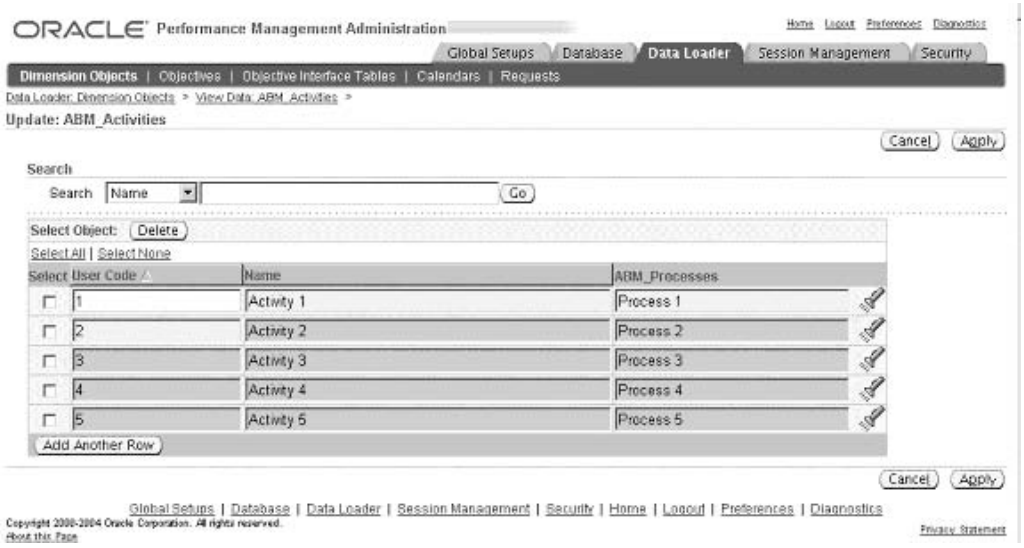
- ❒ Complete the Generate Database process and ensure there are no processes scheduled. See: Generate Database, page 7- 3
- ❒ Review the generated table structure. See: Generate Database, page 7- 6
- ❒ Ensure that designers and administrators are logged out of the system. See: User Sessions, page 9- 1

To load dimension objects:

1. Navigate to Data Loader > Dimension Objects.
2. Query and then select the dimension objects that you want to load.
3. Specify a data load method for each dimension object.

To manually enter data

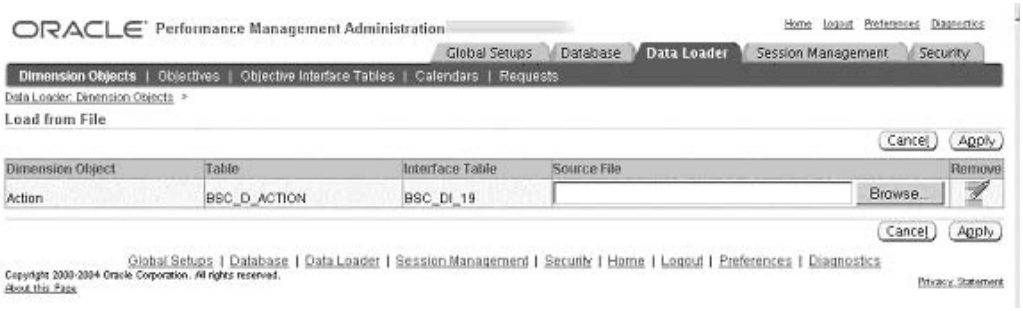
4. Click View Data. You can view the data currently in the table for preseeded dimension objects as well as custom dimension objects.



5. Click Update Data.
6. Enter the data in each column, as required. If necessary you can add additional rows to the table.
7. Click Apply to save your work.

To load data from a text file

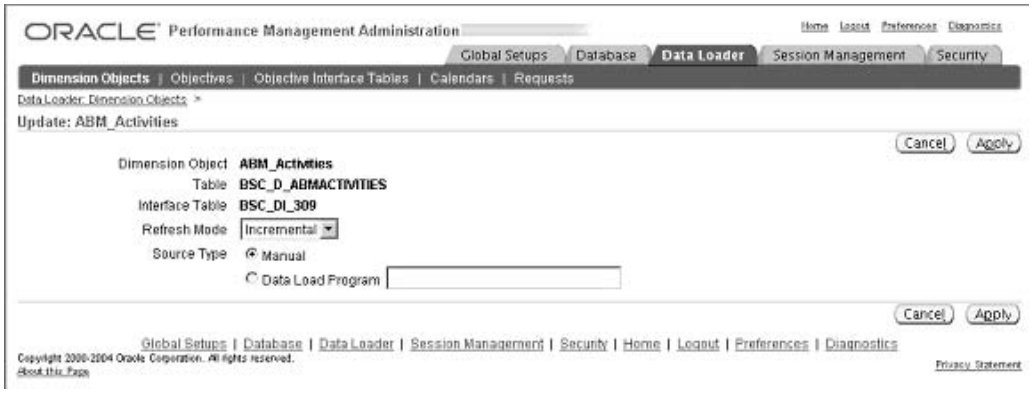
8. Click Load Data from File.



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

To load data from a program

11. Click Update.



12. Select Data Load Program and enter the program path and name.

    Note: The program must be compiled in the APPS schema.

13. Click Apply to save your work.
14. Click Refresh Dimension Objects to start the Data Loader - Refresh Dimension Objects by Interface Table request.
15. Review and modify the list of dimension objects being updated, then click Continue.
16. Schedule the request and set up notifications as required.

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

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

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

Load Objective Interface Tables

To load data for objective interface tables, specify one of the following data load methods:

- Enter data manually
- Load data from a file
- Load data using a program

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

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

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

Prerequisites

- ❒ Complete the Generate Database process and ensure there are no processes scheduled. See: Generate Database, page 7- 3
- ❒ Review the generated table structure. See: Generate Database, page 7- 6
- ❒ Ensure that designers and administrators are logged out of the system. See: User Sessions, page 9- 1

To load objective interface tables:

1. Navigate to Data Loader > Objective Interface Tables.
2. Query and then select the tables that you want to load.
3. Specify a data load method for each table.

To load data from a text file

4. Click Load Data from File.
5. Select the file you want to use to load data. The file must be a delimited text file.
6. Click Apply to save your work.

To load data from a program

7. Click Update.
8. Select Data Load Program and enter the program path and name.

   Note: The program must be compiled in the APPS schema.

9. Click Apply to save your work.
10. Click Refresh Summaries to start the Data Loader - Refresh Summaries by Objective Interface Tables concurrent program.
11. Enable the "Refresh related dimension objects" check box if you also want to refresh any dimension objects that are related to the selected interface tables.
12. Review the list of interface tables being refreshed , then click Continue.
13. Schedule the process and set up notifications as required.

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

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

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

Load Objectives

When you load objectives you also have the option to refresh related dimension objects or related objectives.

Prerequisites

- ❒ Complete the Generate Database process and ensure there are no processes scheduled. See: Generate Database, page 7- 3
- ❒ Review the generated table structure. See: Generate Database, page 7- 6
- ❒ Ensure that designers and administrators are logged out of the system. See: User Sessions, page 9- 1

To load objective interface tables:

1. Navigate to Data Loader > Objectives.
2. Query and then select the objectives that you want to load.
3. Click Refresh Summaries to start the Data Loader - Refresh Summaries by Objectives concurrent program.
4. Enable one or both of the following options:
   - **Refresh related dimension objects.** Refreshes any dimension objects related to the selected objectives.
   - **Refresh related objectives.** Refreshes any objectives that share common tables with the selected objectives.
5. Review the list of objectives being refreshed, then click Continue.
6. Schedule the process and set up notifications as required.

   The list of available recipients is based on the users defined in Oracle Workflow. Users will receive one notification for each objective refreshed.
7. Click Finish to submit the Data Loader - Refresh Summaries by Objective concurrent program.

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

Delete Objective Data

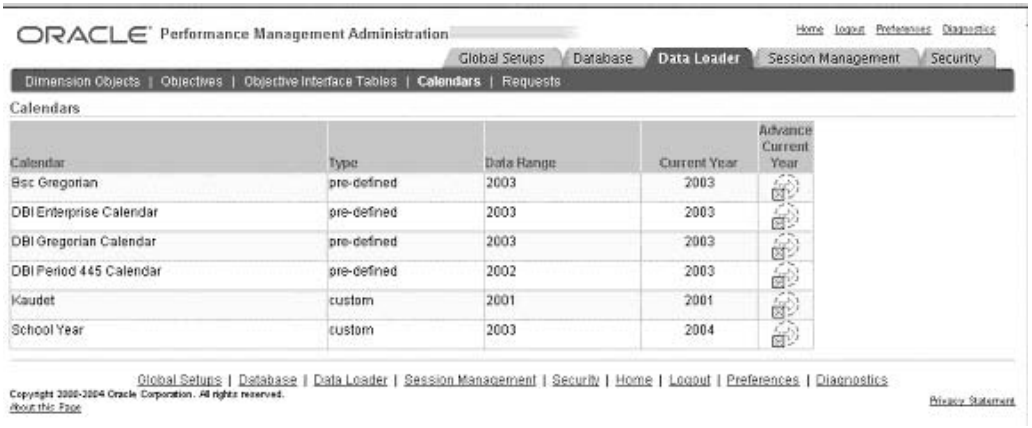
You can delete data for objectives if required. This feature is useful if you entered some data for testing purposes that you no longer need.

To delete objective data:

1. Navigate to Data Loader > Objectives.
2. Query and then select the objectives that you want to delete.
3. Click Delete Data.

   A warning message indicates which other objectives will be affected if you delete the data. Affected objectives share a common table with the objective you are deleting data for.
4. Click Yes to Confirm that you want to delete the data.

Advance Calendar



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

It is also important to note that not all objectives use the same calendar and that not all calendars use the same current year.

To advance calendars:

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

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

Update preseeded calendars using Daily Business Intelligence.

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

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

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

Related Topics

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

Monitor Requests

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

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

Related Topics

Oracle Applications System Administrator Guide.

9

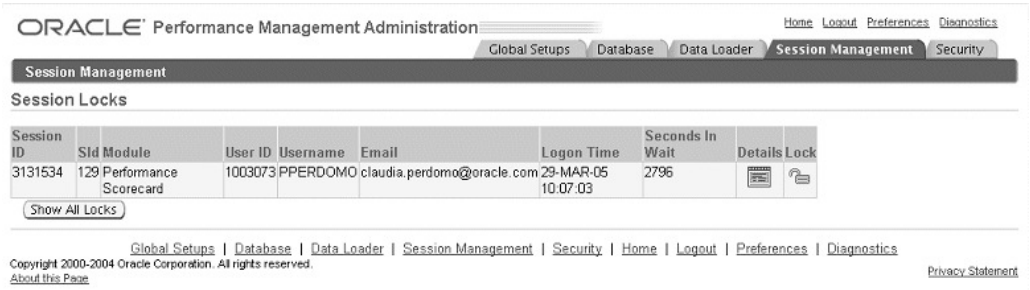
User Sessions

Manage Multiple User Sessions

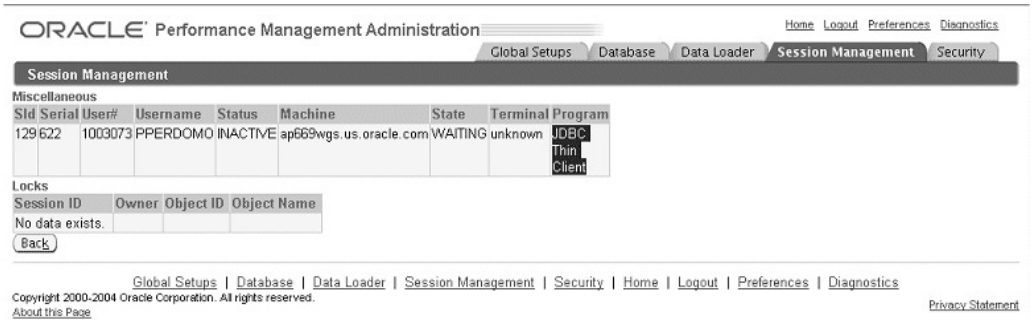
Before you run the Generate Database or the Data Loader processes, all designers and administrators must exit Balanced Scorecard. Viewers do not need to exit Balanced Scorecard; however, they can only view prototype data while these processes are running.

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

1. Log into Oracle Applications using the Performance Management Designer responsibility.
2. Navigate to Session Management. You can view the active sessions.



3. Click Show All Locks to view all of the sessions that currently have data locked.
4. Click Details to view the details of a particular session.



5. Notify the active Designers or Administrators to log off the system.

10

Migration

This chapter covers the following topics:

- Overview of Migrating Balanced Scorecard Systems
- Create Links Between Systems
- Migrate Systems

Overview of Migrating Balanced Scorecard Systems

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

When you migrate data, the data in the target system is *overwritten* by the data from the source system.

There are three ways to migrate Balanced Scorecard systems:

- **All System:** Migrates the entire system.
- **By Tab:** Migrates specific scorecards as well as the KPIs and other data associated with those scorecards.
- **By KPI:** Migrates specific KPIs.

You cannot migrate a system unless both the source and the target system already exist.

1. Create a link between the target and source systems, page 10- 1
2. Migrate the source system to the target system, page 10- 2

Create Links Between Systems

To migrate data between two scorecard systems, create a database link between the source and the target system.

To create a database link:

1. Open SQL plus.
2. Connect to the target system. Since the target is an enterprise database that connects to the APPS schema, type the following:

   ```
   connect Apps/Apps@Appsschema
   ```

3. Run the bscsdblk.sql script using the username\password SYSTEM\MANAGER. Use the schema name, password and service name of the source system,.

   This script is located in the BSC home directory. For example, d:\ORANT8*i*\OBSC\DB\Admin\sql.

   To run the script, login execute:

   @<OBSC_home_directory_path>\OBSC\DB\Admin\sql\bscsdblk.sql <schema name> <pwd> <service name>

   As previously noted, this script asks for the schema name, password and service name of the source system. The database link to the source system is called BSC_SRC_DBLINK.

4. Test the DBLINK by executing the following query:

```
Select count(*)

from all_tables

where owner='BSC';
```

Migrate Systems

When you migrate data, the data in the target system is *overwritten* by the data from the source system.

Prerequisites

- ❒ Create a link between the source and target systems, page 10- 1
- ❒ Ensure that all users (viewers, designers, and any other administrators) are logged out of the source and target systems. See: User Sessions, page 9- 1

To migrate systems:

1. Log into the Balanced Scorecard Administrative Client. If you are already logged into the Balanced Scorecard Administrative Client, log out and then log back in.

   The default username and password are APPLSYSPUB/PUB.

2. In the System Migration tab, select the target system.
3. Log into the target system.
4. Map the responsibilities from the source system to the corresponding responsibilities in the target system. You can map one responsibility to many or many to one.

   When you migrate data, any secured data is secured according to the same principles in the target system.

5. Choose the migration filter that you want to use: By system, By tab (scorecard), or By indicator.

   If you select by tab or by indicator, you must choose the tabs (scorecards) and KPIs that you want to migrate.

If a tab or KPI belongs to more than one responsibility, it will appear only once.

6. Check Overwrite Target System.

   Caution: When you migrating data, the source system *overwrites* the target system.

7. Choose OK to migrate the system.

   All users can log back into the system after the migration is complete.