Oracle's Hyperion Performance Scorecard – System 9 Release 9.3.1

Readme

Purpose

This document includes important, late-breaking information about this English-only release of Hyperion Performance Scorecard – System 9 Release 9.3.1. Review this information thoroughly before installing Performance Scorecard.

New Features

The Performance Scorecard Domain feature provides the ability to restrict the visibility of business objects (scorecards, measures, initiatives) to specified groups of users allowing control to be delegated to a line of business or separate location. In this release the ability to share business objects in read only mode between Domains well be supported. This will allow business information to be communicated between operations while retaining control within the originating domain.

The Scorecard Strategy Report has been extended to include a wider number of Scorecard properties allowing for more information to be communicated in a single report. The report customization option now allows columns to be added for Result, Score, Status, Trend, Units, Weighted Score, Data Confidence, Adjusted Weight and Adjusted Weighted Score.

Installation, Configuration, and Deployment Updates

Hyperion License Compliance

Hyperion no longer ships or requires Hyperion® License Server™ (or standalone license files) for use with Hyperion products. To ensure compliance with your license agreement, Hyperion recommends that you implement an auditing process. In addition, during product configuration with Hyperion Configuration Utility, you activate only the features you purchased. For more information, see "Hyperion License Compliance" in *Hyperion Installation Start Here*.

IBM WebSphere and UNIX

WebSphere users must use the same account to install, deploy, and run all Oracle Hyperion products. Using the same account ensures that the Configuration Utility can successfully deploy Hyperion products to IBM WebSphere. You must also install IBM FixPack 10 on your IBM WebSphere Servers to ensure that Java applets work correctly.

Configuration on UNIX

Increasing the number of file descriptors - Set the number of operating system file descriptors to at least `1024` using the Limit command to avoid problems during deployment to the application server. You must perform this task before installing and configuring Shared Services. Refer to your operating system documentation for information on using the Limit command.

Launch Error if Hostname Contains Repeating Characters - If the hostname contains repeating characters (such as .hyperion.guppy – the letter **p** is repeated), the .hyperion.*<hostname>* does not resolve correctly and an error is displayed. To resolve this error, remove the following text from `configtool.sh` then launch the Configuration Utility:

`file($HYPERION_HOME/common/config/9.0.0/configtool.sh):`

`| tr -s '[A-Z]' '[a-z]'`

SiteMinder

Netegrity SiteMinder Support - Hyperion products can integrate with Netegrity SiteMinder, a Web access management solutions provider. To use Performance Scorecard with SiteMinder, satisfy these requirements:

- `http://<hps host>:<hps port>/HPSWebReports` is protected in the SiteMinder Policy Server.
- `http://<hps host>:<hps_port>/HPSWebReports/action/casIntegration`
- All users have unprotected access to the above URLs.

For more information, refer to the *SiteMinder Policy Server Administration Guide*.

IBM DB2 Database - If Shared Services is being installed against an IBM DB2 database, increase the applheapsz DB2 configuration parameter to 4000 using this command:

`update db cfg for HUB_DB_NAME using applheapsz 4000`

Restart the appropriate IBM DB2 instance.

Application Server Deployments – Before installing Shared Services, review the Application Server Deployment section of the *Hyperion Shared Services Readme*.

External Authentication -Before installing Shared Services, review the External Authentication section of the *Hyperion Shared Services Readme*.

Deploying on OAS 10.1.2

This section describes how to deploy Performance Scorecard to a single Oracle 10.1.2 application server.

Before Deploying

- Install Oracle 10.1.2 Server and specify that you want to use HTTP protocol.

- Install Performance Scorecard to the computer hosting Oracle 10.1.2 Server. Make any required port assignments or changes.

- To prevent Performance Scorecard from inheriting unwanted runtime settings during deployment, create an OC4J instance called HPS.

- Assign this instance to a group created for Performance Scorecard. Do not modify the Oracle HTTP Server listen port(s), but make any required port assignments or changes. If possible, configure ports during installation using staticports.ini as documented in the *Oracle® Application Server Installation Guide.*

Creating the OC4J Instance and Configuring the HPS Instance

1. Start the SOA suite.

2. Log on to Oracle 10G by navigating to: http://<server>:<port> and specifying the username and password you created when you installed Oracle. This launches the Oracle® Enterprise Manager 10g Application Server Console.

3. Create an OC4J instance called HPS.

4. Start the HPS instance.

5. Click the HPS instance and select **Application Server**, then **HPS**.

6. In **System Components**, click **HPS**.

7. Select **Administration**, then **Server Properties**.

8. In **Command Line Options** add the following;

    a. In **Java Executable**, enter the path to Java Executable, such as C:\j2sdk1.4.2_18\bin\java

    b. In **Java Options**, enter **–Xmx1024m** before the existing text. For example:

    ```
    –Xmx1024m -server -Xrs -Djava.security.policy
    =C:\OraHome_1\j2ee\HPS\config\java2.policy -Djava.awt.headless=true
    ```

9. In **Environment Variables**, click **Add Another Row**.

10. Enter the HYPERION_HOME directory you specified during installation.

11. Click **Apply** and restart the HPS instance.

Deploying the Web Application

1. From **System Components** click **HPS**, then **Application**.

2. Click the HPS instance and **Application**.

3. On the page that displays, click **Deploy WAR File**.

4. In **Web Application**, navigate to **HPSWebReports.war**.
   By default, this file is in:
   <HPS_INSTALL>\AppServer\InstalledApps\Oracle\10g\manual\webapps

5. In **Application Name**, enter an application name (HPSWebReports).

6. In **Map to URL**, enter **/HPSWebReports**.

7. Click **Deploy.**

8. Restart the HPS instance.

9. After deployment, copy the following files from: HYPERION_HOME\deployments*<appserver>*\
   webreportsDomain\webapps\HPSWebReports\WEB-INF\lib to:
   OraHome\C:\OraHome_1\j2ee\home\applib.

   - css-9_3_1.jar

   - jdom.jar

   - log4j-1.2.14.jar

   - xalan.jar

   - xercesImpl.jar

   - xsltc.jar

10. Restart the HPS instance.

Migration Considerations

Any migration considerations for your product, common component, or bundled products should be here, using headings to categorize the information.

This release of Performance Scorecard supports two options for creating, managing and applying security rights to users:

- Standalone, using the Performance Scorecard Administrator. User security and access are managed locally.

- Using Shared Services

Performance Scorecard provides a user migration feature that enables you to automatically generate Shared Services users based on existing Performance Scorecard users. Employee names, domain identifiers, security roles and group definitions are migrated.

Note: You can only perform a migration of users to Shared Services once. After registering with Shared Services for user management the option of local user authentication is disabled. If you

perform a migration of users to a non-native authentication server using the migration feature, note these requirements:

- For NTLM, LDAP and MSAD authentication servers, ensure the users to be migrated already exist in the authentication server. For Native authentication, the migration automatically creates the users so they do not need to pre-exist.

- For NTLM, the Full Name field in the user account setup screen on the NTLM server must be specified in this format:

  '<First Name> <Last Name>' (for example, John Smith)

Known Issues

This section describes known issues in this release. If available, workarounds are provided. For information about a specific issue, contact Client Support or visit the Hyperion Web site.

- The JAVA_HOME variable is not defined when staring up Performance Scorecard running with Tomcat on Hewlett-Packard based Platforms. (8-579535221).

  To set the correct variable open startHps.sh for Tomcat and change JAVA_HOME=/home/hps/Hyperion/common/JRE/HP/1.5.0 to: JAVA_HOME=/home/hps/Hyperion/common/JRE-IA64/HP/1.5.0

- When creating a measure template with the same name as an existing measure template, an Alert dialog will be displayed which cannot be dismissed by the user (8-625751520). Exit the browser and login into the application again.

- You get a Security Risk warning on UMC when accessing integrated product ACL page for the first time. (8-623005171)

- You get a DataDirect driver java.lang.VerifyError at start up (8-573454951).

- The DB2 administration (db2admin) user does not have the db2admin created in DB2 database in windows 2003 does not have all the permissions on HPS objects. (8-510922211)

- Using Hyperion Configuration Utility to re-deploy an existing web application to WebLogic 8.1.x does not work properly (8-622884295). To resolve this issue, undeploy the web application, and then use Hyperion Configuration Utility to deploy it as a new web application.

- When managing Shared Services models and naming applications, you cannot use the forward slash (/), backslash (\), or double quotation (") characters (8-514151218).

Defects Fixed in this Release

These defects have been resolved:

7188939	No information about deploying on OAS 10.12. This readme provides the deployment procedure.
1-354461893	The time taken to generate a large number of multi-dimensional measures through the measure template setup has been reduced substantially.
8-519137343	The terminology has been modified from "Manager" to "Direct Reports" in the Managed Employees dialog box.
8-514591020	When a sub-initiative is created, it will now take on the attributes of the parent.
8-514591033	The paste function correctly copies initiatives.
8-584487910	Deploying Performance Scorecard on IBM WebSphere 6.0.2.11 when the default parameters are used will no longer generate interface errors.
8-620394399	Hebrew characters are displayed correctly in Accountability, Strategy Tree and Strategy maps.
1-191355679	Long measure descriptions are fully displayed in map tree elements.
8-561062341	Measure Template frequencies are now correctly assigned to Targets.
8-620816628	Measures with formulas on custom targets no longer disappear in the Scorecard Report
8-612778936	Measure order can now be modified by drag-and-drop.
8-530661832	The measure notes screen, the header can now be changed to update the list of notes displayed.
1-253673001	Attached document links correctly link to Notes
8-576121622	Measures using aggregation functions will promote correctly.
8-527711942	The web page restriction "Hide Employees" correctly removes Employees functionality from view.
8-520469434	When converting models, all status indicators images are displayed correctly without manual intervention.
8-573063915	Collection dates in measure target collection tab are displayed properly.
8-508908735	The Initiative report can now be filtered by initiative status.
8-550925264	Charting colors now display correctly.
8-612778680	The order of perspectives and measures in the Object View is established by the designer and will not be displayed in automatic alphabetic order.
8-511721638	Newly created named ranges assigned to a measures are correctly displayed in the General tab.

Tips and Troubleshooting

Hyperion urges you to use the following recommendations:

- When applying Performance Scorecard security roles to a large number of users in Oracle Hyperion Shared Services create the users in Oracle Hyperion Shared Services and then select the Synchronize with Shared Services option in Performance Scorecard to automatically assign security roles and employee records to the users.

- If you are going to deploy the Alerter to a Web application server cluster, a single instance of Alerter to avoid repeated and unwanted e-mail notifications.

- Do not use any restricted names or characters when naming databases, dimensions, members, aliases, or dimension measure templates, as you may be unable to generate an Oracle Hyperion Enterprise Analytics database from Performance Scorecard. For a list of restricted names and characters, refer to the *Oracle Hyperion Performance Scorecard Administrator's Guide.*

- Back up all attachments for initiatives, employee profiles, and notes, in addition to status symbols before uninstalling or updating your application server, as these files will be removed during the installation process. Refer to the Oracle *Hyperion Performance Scorecard Administrator's Guide* for information about backing up attachments.

- Specify an application framework before creating Strategy, Accountability, and Cause and Effect maps since this determines the default map element hierarchy and ordering.

- Do not delete a performance indicator to which measure or scorecard ranges are attached as all ranges are also removed.

- Avoid having multiple browser sessions open simultaneously on the same computer. Because Internet Explorer shares session between computers, multiple logins may cause problems. If you have multiple browser windows open on the same computer, the session is shared across the browser windows. Exit all pages by clicking Save to avoid losing data.

Documentation Updates

The following documentation has been updated for Oracle Hyperion Performance Scorecard Release 9.3.1:

- Oracle Hyperion Performance Scorecard Installation Guide

- Oracle Hyperion Performance Scorecard New Features Guide

- Oracle Hyperion Performance Scorecard Designers Guide

- Oracle Hyperion Performance Scorecard Administrators Guide

- Oracle Hyperion Performance Scorecard Readme

- Oracle Hyperion Performance Scorecard Adapter Readme

The documentation suite for the previous release is available from Information Map. If you cannot launch the documentation in PDF format, you may be experiencing a security setting issue in Adobe Acrobat 6. Refer to the workaround for your system posted on the Adobe website: http://www.adobe.com.

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