

ObjTracker - Balanced Scorecard

Installer Guide

Target Audience:

The website administrator (**Installer**) installs this application and appoints one or more Balanced Scorecard administrators by giving that user ID a “**objtrackeradmin**” capability. The Balanced Scorecard administrator generally should be either an administrative assistant to the organization's executive or department leaders.

The Balanced Scorecard administrator must do an initial setup, define Balanced Scorecard users and departments, create objectives, and manage the application on an on going basis so that Balanced Scorecard users can input the measurements and add attachments.

For this plugin add the capability “**objtracker**” if the user doesn't have the “**objtrackeradmin**” capability. If either is assigned then Tools menu will have an entry and be able to invoke the plugin.

I.1 Wordpress Installation.

Requirements:

- You will need to add a Wordpress user “objtrackeradmin” or “objtracker” capability to all of those who will use this plugin. You will need to add a “objtrackeradmin” to one or more of your users so that they become the administrator for the Balanced Scorecard. Any way that you can do this is okay, for example the **Capability Manager Enhanced** plugin is sufficient.
- MySQL 5.6 was used during development. Prior versions were not tested.
- Wordpress 3.5.2 was used during development. Prior versions were not tested.

Installation steps:

1. Install objtracker Balanced Scorecard either via the WordPress.org plugin directory, or by uploading the files to your server.
2. Activate objtracker plugin.
3. Add "objtrackeradmin" capability to one or more users who will (at least initially) act as Balanced Scorecard administrators. For additional information concerning adding Wordpress user capabilities, see the next section
4. Have one of the Balanced Scorecard Administrators launch the Balanced Scorecard using the "objtracker" link in the tools menu. This starts the installation of the objtracker database components.

As of objtracker version 1.0.3, the process is now a series of prompts where you are expected to click the 'Click to continue' button to process each step. This should help identify database setup errors and insure that each step is shorter than your Wordpress `set_time_limit` value.

Time to setup the Balanced Scorecard database components.

#	Step	Status
Start	The Balanced Scorecard database setup is required	Starting
0	Clearing of prior database components for the Balanced Scorecard	
1	Creating database tables	
2	Creating database functions	
3	Creating database stored procedures	
4	Application data	
5	Add your, your organization, and your department	
6	Creating database triggers	

If you need to restart this process because of an error, you may need to delete the objtracker database tables. This can be done from a MySQL command line and the `sql/Drops/Tables.sql` file. Depending on your Wordpress database name and your MySQL users and passwords, use:

```
mysql -h localhost -uroot -D wordpressdb < sql/Drops/Tables.sql
```

I.2 Adding Wordpress user capabilities

Here is a longer description of adding a Wordpress user capability based on the "Capability Manager Enhanced" plugin.

Installing Enhanced Capability Manager

1. Install Capability Manager Enhanced plugin following their instructions.
2. Enable plugin - this adds a **Capability** menu item to the Users menu.

Using Enhanced Capability Manager

1. Click **Capabilities** from Users menu.
2. In **Select Role to View / Edit** box in upper right of page, select role "Administrator" and click **Load**.
3. In **Add Capability** box, last on right side, type "objtrackeradmin" and click **Add to role**.
4. Scroll to the bottom of the page, notice "objtrackeradmin" in Additional Capabilities list.
5. Click **Save Changes** - these user should now see "objtracker" in the Tools menu.

I.3 What happens next?

When one of the Balanced Scorecard Administrators enters the application, the database components are added along with an entry for that user in the Balanced Scorecard's People table as an administrator. From there, this user can add the additional people who ought to participate with this business application. Only when the non-administrator has "objtracker" capability and is in the plugin's user table, will the user be able to access the plugin.

If the Tools menu is hidden from a user, then objtracker can be accessed by `websitename/wp-admin/tools.php?page=objtracker/objtracker.php`.