Hewlett Packard Enterprise

IT Business Analytics

Software Version: 10.10

Linux operating system

Getting Started Guide

Document Release Date: February 2016

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Administrator - Business Analyst - End-user

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	• **Create Dashboard Pages** • **Personalize Dashboard** • **Wire components**	
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Optional - Install and Manage Content Acceleration Packs

Content Acceleration Packs (CAPs) in the *Guide to Content Acceleration Packs*.

Configure Settings

Users, Roles, Resources, Permissions, LDAP, and Dimension Permissions in the *Administrator Guide*.

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Set up to Bring Data in the System

- **Dynamic Data using integrations and Data Warehouse**

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  Integration with CSA in the *Content Reference Guide*.

  Integration with PPM in the *Content Reference Guide*.

  Integration with SM in the *Content Reference Guide*.

  Connect the Data Sources in the *Administrator Guide*.

- **Static Data**

  Semantic Layer - Excel (or .CSV) File Loader in the *Administrator Guide*.

- **Advanced Configurations**
  - Use ID to extend content. For details, see *Content Extension Guide*.
  - Create Business Context using Context Designer. For details, see Semantic Layer - Context Designer in the *Administrator Guide*.
  - Modify extractors. For details, see *DCS Extractor SDK Guide*.

Perform the Maintenance

- Perform the ETL tasks. For details, see Run ETL - Content Flow Management in the *Administrator Guide*.
- Use the Maintenance Tools. For details, see Maintenance Tool in the *Administrator Guide*.
- Business Analytics Back Up in the *Administrator Guide*.

Review the OOTB Elements

- OOTB KPIs/Metrics related to Data Sources. For details, see each data source integration in the *Content Reference Guide*.
- OOTB Contexts. For details, see Reference: Contexts (Universes) in the *Content Reference Guide*.

Customize the Studio and Dashboard contents

- **Customize the Studio Contents**

  Scorecard Configuration Details in the *Business Analyst Guide*.

  Cascading Scorecards in the *Business Analyst Guide*.

  Perspective Configuration Details in the *Business Analyst Guide*.

  Objective Configuration Details in the *Business Analyst Guide*.

  KPI or Metric Configuration and Calculation Details in the *Business Analyst Guide*.

  KPI Breakdowns in the *Business Analyst Guide*.

  Metric Breakdowns in the *Business Analyst Guide*.

  KPI or Metric Formula in the *Business Analyst Guide*.

  KPI or Metric Filter in the *Business Analyst Guide*.

  Calculation in the *Business Analyst Guide*.

  Recalculation in the *Business Analyst Guide*.

  Calculation Scheduling in the *Business Analyst Guide*.

  Calculation and Recalculation Monitoring in the *Business Analyst Guide*.

- **Customize Dashboard Pages**

  Page Layout and Components in the *Business Analyst Guide*.

Wiring Between Components in the *Business Analyst Guide*.

Explorer in the *Business Analyst Guide*.

Personalize a Dashboard Page in the *Business Analyst Guide*.

The Breakdown View Component in the *Business Analyst Guide*.

The Historical View Component in the *Business Analyst Guide*.

The Historical Metric View Component in the *Business Analyst Guide*.

The KPI View Component in the *Business Analyst Guide*.

The KPI List Component in the *Business Analyst Guide*.

The KPI Rolodex Component in the *Business Analyst Guide*.

The Page Filter Component in the *Business Analyst Guide*.

The Pie Chart Component in the *Business Analyst Guide*.

The Scorecard Component in the *Business Analyst Guide*.

The Web Intelligence Report Viewer Component in the *Business Analyst Guide*.

The Web Intelligence Report Viewer Component in the *Business Analyst Guide*.

The SWF Report Viewer Component in the *Business Analyst Guide*.

The Web Intelligence Static Report Viewer Component in the *Business Analyst Guide*.

The Xcelsius Reports Viewer (Flash) Component in the *Business Analyst Guide*.

The Forecast Component in the *Business Analyst Guide*.

The US Map Component in the *Business Analyst Guide*.

The World Map Component in the *Business Analyst Guide*.

The Bubble Chart View Component in the *Business Analyst Guide*.

The Cluster Bar Chart View Component in the *Business Analyst Guide*.

The Stacked Bar Chart View Component in the *Business Analyst Guide*.

The Line and Bar Combination Chart View Component in the *Business Analyst Guide*.

View Results

View and Analyze the Business Objectives in the *Business Analyst Guide*.

Explorer in the *Business Analyst Guide*.

Advanced Configurations

Semantic Layer - Context Designer in the *Administrator Guide*.

SAP BusinessObjects Enterprise Contexts (Universes) in the *Business Analyst Guide*.

Develop New Content Using the Integrated Development Environment in the *Content Extension Guide*.

Create Content Acceleration Packs in the *Guide to Content Acceleration Packs*

IT Business Analytics automatically gathers data from across your IT systems to build key performance indicators (KPIs) providing organizations with broad and deep insights into everything IT does. The image map below provides the main workflow of Business Analytics.
A corresponding interactive map is available in the Help Center main page where you can click any colored box to open the corresponding document. For details, see Help Center Dashboard.

Step-by-step with Business Analytics

This section provides the list of steps to perform to begin working with the Business Analytics application.

Prerequisites

- Read the *Release Notes*.
  The document includes release notes, and installation and upgrade information.
- Read the *Support Matrix*.
  The document includes information about the supported data sources and the requirements.

Install Business Analytics or Upgrade to the latest version

- Install Business Analytics and run the post-install wizard.
  For details, see the *Installation Guide* .
- Upgrade Business Analytics and run the post-install wizard. For details, see the *Upgrade Guide* available on the Installation DVD.
- Migrate to Business Analytics and run the post-install wizard. For details, see the *Migration Guide* available on the Installation DVD.

Set up Users, Permissions, and Settings

Set up the users, permissions, settings, perform maintenance, and more. For details, see Getting Started with Administration Tasks in the *Administrator Guide*.

Upload Data to Business Analytics

You can upload data to Business Analytics using one or more of the following processes:

- **Install Content Packs**

  Install the relevant Content Packs. A Content Pack is a set a files which defines the execution of an ETL along with all its parameters. For details, see Install Content Pack in the *Administrator Guide*.

- **Connect Data Sources**

  Connect the relevant data sources. The integration of data into the Data Warehouse (DWH) is through the activation of data sources. For details, see Connect the Data Source in the *Administrator Guide*.

  The supported data sources are:

  - Integration with ALM
  - Integration with AM
  - Integration with AWS
  - Integration with AWSCW

- Integration with Azure - Activate the Azure Data Source
- Integration with CSA
- Integration with PPM
- Integration with SA
- Integration with SM
- Integration with CO - Activate the CO Data Source

All these documents are available in the *Content Reference Guide*.

- **Optional - Configure the Consolidation**

  The Consolidated Entities page enables you to consolidate an entity that appears in different data sources, to prioritize the data sources, to select the relevant entity dimensions (columns), and to select when to use the consolidation.

  For details, see Configure Consolidation in the *Administrator Guide*.

- **Run the ETL - Content Flow Management**

  After a Content Pack (CP) is activated, the Content Pack Manager notifies the Content Flow Manager to create a job stream for this CP instance. The job stream includes a series of predefined steps. Each step is an individual job such as an extractor job or an ETL job. The job executes the backend process to pull the data from the data source to the Data Warehouse.

  Each CP instance has an individual job and each job can run in parallel.

  The data warehouse uses the ETL process to extract, consolidate, and transform the source data into a meaningful target model that populates relevant business analytics.

  For details, see Run ETL - Content Flow Management in the *Administrator Guide*.

- **Populate Business Analytics using Content Acceleration Packs**

  Content Acceleration Packs are ready-to-import packages that include one Scorecard, several KPIs, a Dashboard page that displays data in the Scorecard component and its KPI components, a Context (universe), and more.You can then use Content Acceleration Packs as the base for further configuration of KPIs, contexts, Dashboard pages or more, or you can remove the Content Acceleration Packs.

  For details, see Content Acceleration Packs (CAPs) in the *Guide to Content Acceleration Packs*.

- **Optional - Upload data into Business Analytics using .CSV files**

  You can simply and easily upload data into the ITBA Studio using .CSV files without integrating with external sources or other HPE products. The Studio can then be used to integrate with third party data sources, testing, or for Proof of Concept (POC) sessions. For details, see Semantic Layer - Context Designer in the *Administrator Guide*.

Customize - Use out-of-the-box KPIs and Metrics or Create your Own and Create your Dashboard Display

- **Review and customize the contents of the Studio and Dashboard pages**

  For details on working with the Studio and Dashboard,see Getting Started with the Studio and Dashboard in the *Business Analyst Guide*.

  Review Scorecards, Perspectives, Objectives, and KPIs in the Studio. You can customize these items. For details, see Scorecard Configuration Details, Perspective Configuration Details, Objective Configuration Details, or Objective's KPIs in the *Business Analyst Guide*.

  If you have installed a Content Acceleration Pack, you can review the Executive page in the Dashboard. You can also create your Dashboard pages by populating them with the relevant components. For details, see Dashboard Page or Page Layout and Components. Or add components as described in Dashboard Display in the *Business Analyst Guide*.

- **Combine data and contexts from all methods**

  You can combine contexts from the Content Acceleration Packs, from tables created using .CSV files, and tables created by integrating with supported data sources.

  You can combine data obtained from the integration with supported data sources and from tables imported using .CSV files.

Customize Business Analytics Contexts

In addition to customizing Scorecards, Perspectives, Objectives, KPIs, Metrics, and Dashboard pages, you can also customize the contexts:

- View the out-of-the-box universes created by integrations with supported data sources. For details, see the relevant context in the Reference: Contexts (Universes) in the *Content Reference Guide*.
- You can also create your own context (universe) using the existing database tables, and tables created by importing .CSV files, and creating relationships between these tables. You can select the entities you want to use to create KPIs in the Studio, and then use these KPIs to build the relevant Dashboard pages. For details, see Semantic Layer - Context Designer in the *Administrator Guide*.

Extend your content (Advanced users)

The Integrated Development Environment (IDE) allows you to develop content, model DWH schemas, and more. For details, see Develop New Content Using the Integrated Development Environment in the *Content Extension Guide* or in the HPE Software Support Online web site (https://softwaresupport.hp.com/group/softwaresupport/home).

Localize and globalize

The user interface of HPE ITBA supports multiple languages. For details, see Localization and Globalization in the *Administrator Guide*.

View the Data in the Dashboard

For details, see View and Analyze the Business Objectives in the *Business Analyst Guide*.

Business Analytics UI Modules

IT Business Analytics includes several user interface modules.

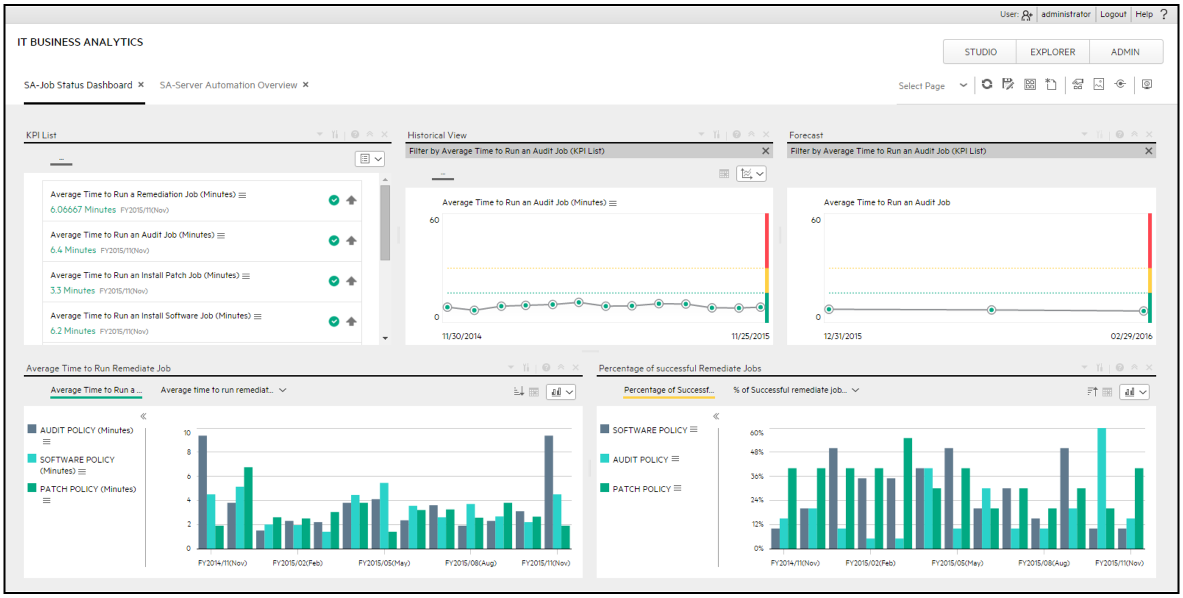
Depending on their permissions the Administrator, the Business Analyst, and the Executives can view, manage, or administrate tabs, pages, components, and more.

Learn More

Dashboard

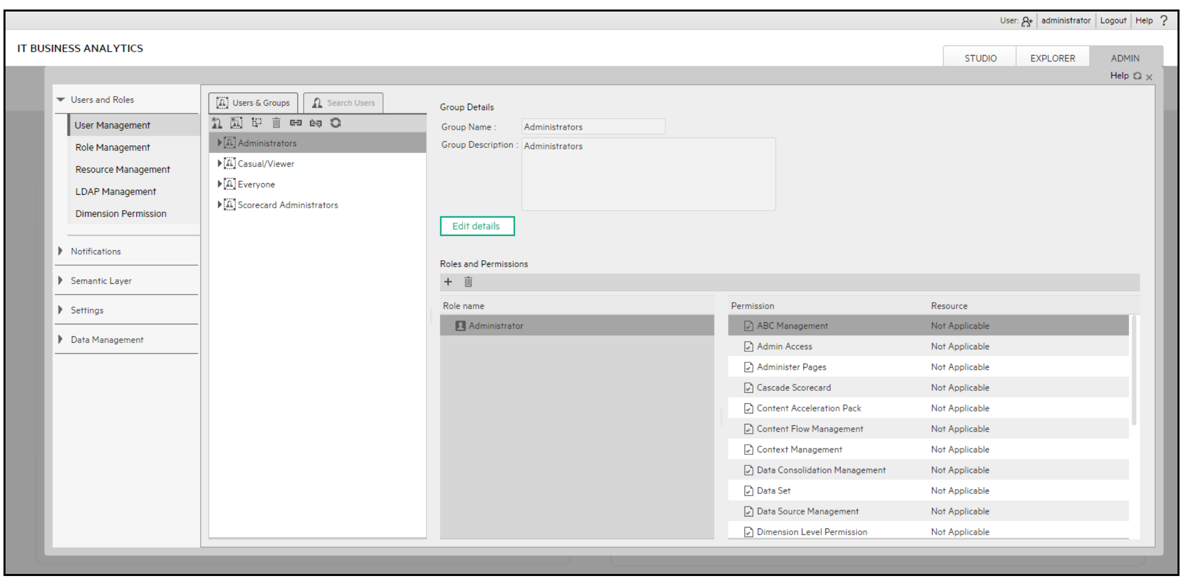
The Dashboard has several capabilities:

- The Dashboard mashup is where the Business Analyst can create pages and components, and can configure how to display the information that the Executive wants to see. The information is displayed on pages that can include one or more components. For details about what you can do in the Dashboard, see Dashboard Display in the *Business Analyst Guide*.
- The Dashboard display is where the Executives view the pages relevant to the Executive role, can view how well their required objectives are doing, and can drill down to subordinates pages to breakdown the information and get a better understanding of the situation. For details about what the Executive can view in Dashboard, see View and Analyze the Business Objectives in the *Business Analyst Guide*. For concept details about the Dashboard, see Dashboard Capabilities in the *Business Analyst Guide*.



ADMIN tab

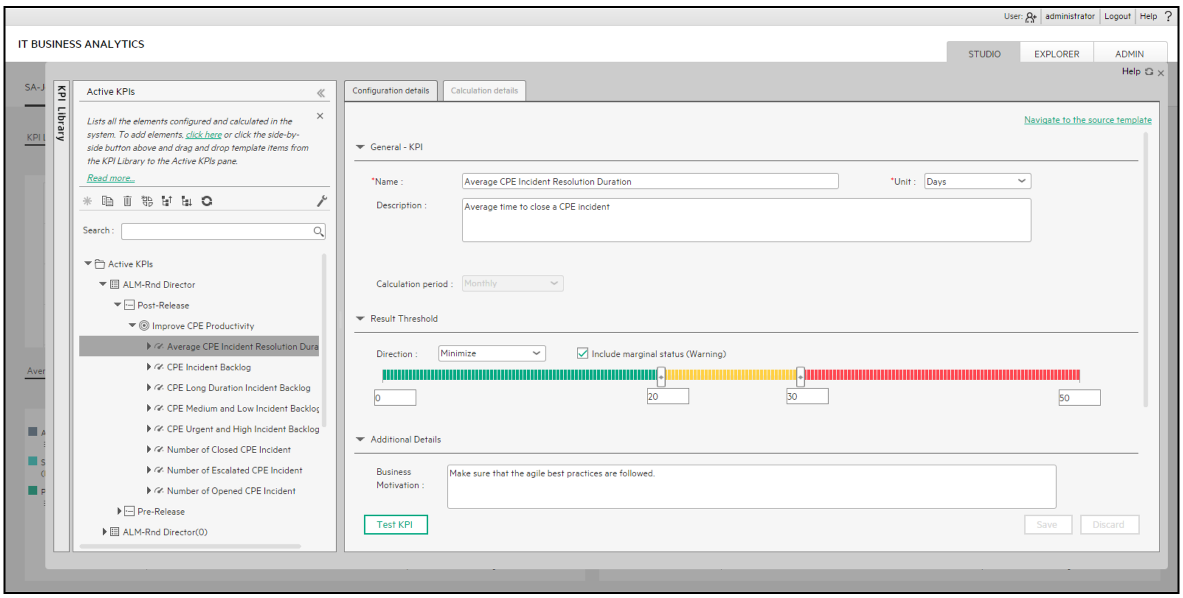
The component where the administrator sets the users, permissions and roles, and performs the administration and maintenance of ITBA and Data Warehouse. For details, see Getting Started with Administration Tasks in the *Administrator Guide*.



STUDIO tab

The Studio is where the Business Analyst creates and manages all the building elements that are used to create the displayed pages and components of the Executive Dashboard. In the Studio, the Business Analyst can:

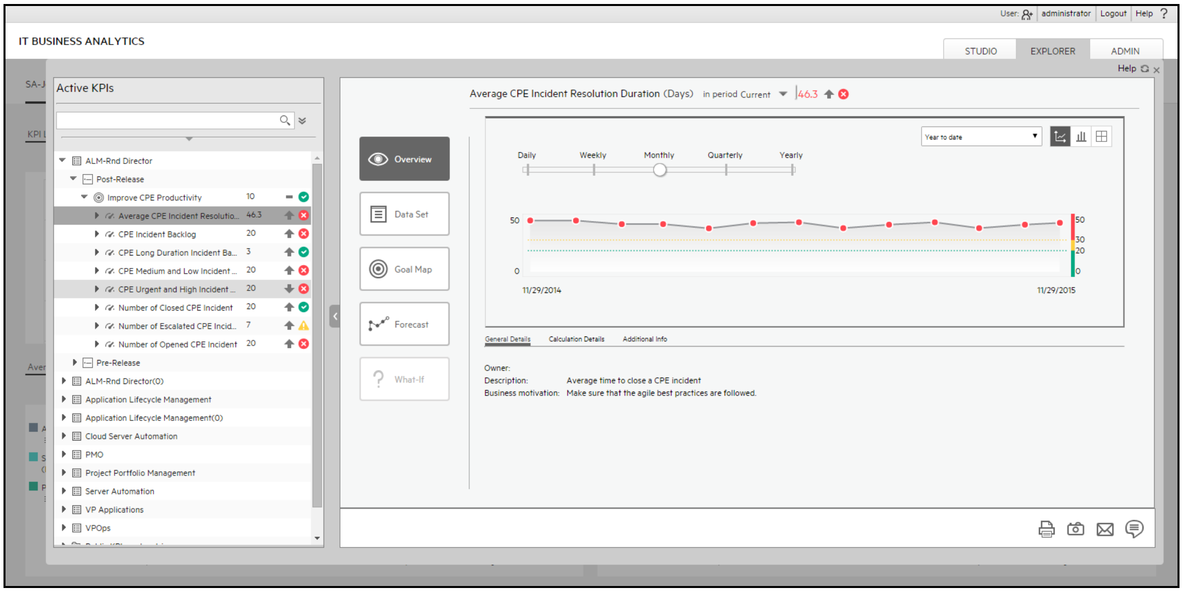
- Manage Scorecards, Perspectives, Objectives, Metrics, Metric Breakdowns, KPIs, KPI Breakdowns, or Unassigned KPIs
- Change formulas or filter thresholds, and more. For concept details about the Studio, see Business Analytics Components in the*Business Analyst Guide* . For details about what the Business Analyst can do in the Studio, see Learn About the Executive Dashboard, Create the Dashboard Contents in the Studio or Enrich the Dashboard Contents in the Studio in the *Business Analyst Guide* .



EXPLORER tab

The EXPLORER tab is where the executives can view overtime information about Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs, and can access other reports or external pages that display other facets of the situation. The executives usually access the EXPLORER tab in context, by drilling down from the relevant Objectives or KPIs in the Dashboard components. Executives can also add, edit, and email annotations regarding the elements displayed in the Explorer.

For details about the Explorer, see Explorer in the *Business Analyst Guide*. For details about what the Executive can view in Explorer, see View and Analyze the Business Objectives in the *Business Analyst Guide*.


IT BUSINESS ANALYTICS
User: administrator | Logout | Help ?
STUDIO
EXPLORER
ADMIN
Active KPIs
ALM-Rnd Director
Post-Release
Improve CPE Productivity
Average CPE Incident Resolutio...
CPE Incident Backlog
CPE Long Duration Incident Ba...
CPE Medium and Low Incident ...
CPE Urgent and High Incident ...
Number of Closed CPE Incident
Number of Escalated CPE Incid...
Number of Opened CPE Incident
Pre-Release
ALM-Rnd Director(0)
Application Lifecycle Management
Application Lifecycle Management(0)
Cloud Server Automation
PMO
Project Portfolio Management
Server Automation
VP Applications
VPOps
Overview
Data Set
Goal Map
Forecast
What-If
Average CPE Incident Resolution Duration (Days) in period Current 46.3
Year to date
Daily
Weekly
Monthly
Quarterly
Yearly
11/29/2014
11/29/2015
General Details
Calculation Details
Additional Info
Owner:
Description: Average time to close a CPE incident
Business motivation: Make sure that the agile best practices are followed.

Content Acceleration Packs

Learn More

Content Acceleration Packs (CAPs) are packages that include Dashboard pages that display Scorecards and components, KPIs, Metrics, Contexts (universes), data (from .CSV files or from data sources), and documentation for the CAP. You can import them, export them, activate, or deactivate them, or you can create your own.

CAPs describe typical stories that show how the correct implementation of Business Analytics drives Performance Improvement and Cost Reduction for the IT organization.

CAPs demonstrate Business Analytics capabilities, and helps you add basic elements that can be used to customize your Dashboard.

For details, see Content Acceleration Packs (CAPs) in the *Guide to Content Acceleration Packs*.

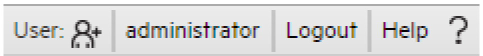
About KPIs, Metrics, Contexts, and Data Source Integration

This section provides information about the Data Sources, the Contexts linked to the data sources, and the corresponding KPIs and Metrics, and indicates if there is a need for consolidation when working with other data sources. For details, see KPIs, Metrics, Contexts, and Data Source Integrations in the *Content Reference Guide*.

How Data is Included into Business Analytics

For details, see the *Data Usage Overview* document in PDF format.

Application Toolbar



The application toolbar in the top right corner includes the following:

- **User**. Displays a picture of the current user.
  You can select the relevant picture. For details, see Personalize the Dashboard in the *Business Analyst Guide*.
- **<user_name>.** The user name of the current user.
- **Logout.** Click the button to log off.
- **Help.** Click to open a menu and select the relevant option:
  - **Help Center.** Select to open the complete online documentation.
  - **Movies.** Select to access a list of the ITBA movies. For details, see Access Movies in the *Getting Started*.
  - **About.** Select to view details about the version, patches, and Content Packs, as well as License information, and copyrights. For details about the licenses, see Licenses in the *Administrator Guide*.

Common Use Cases

This section provides the basic scripts for common use cases, an explanation about how to access the movie that presents the script, and a link to the relevant page in the documentation where you can find more conceptual information and a detailed description of the relevant UI pages or dialog boxes.

Use Cases with Movies

> **Note:** To view the movie, click **Help** in the top right corner of the application main page, select the **Movies** option, and select the relevant movie.

End-to-End Data Flow

In this use case, you will view the entire end-to-end flow: from how to import data from an HPE product and then how to calculate a KPI and present the result in the Dashboard. Business Analytics allows you to calculate metrics and KPIs and then present those results in a unified dashboard.

We will then see how to import data from a custom spreadsheet as well.

Movie: **0_E2E_data_flow**

Find Information

In this use case, you will learn where you can find information about how to use ITBA:

- The Online Help (or Help Center)
- The PDFs
- The SSO Manual Site
- Movies
- Forums
- and more.

For details, see How to Find Information in the *Getting Started*.

Movie: **24_Find_Information**

Understand the Documentation

In this movie, you will learn how to understand the Business Analytics documentation and where to find what.

For details, see How to Find Information in the *Getting Started*.

Movie: **29_Understanding_the_documentation**

End User Features

In this use case, you will, as the end user, explore Business Analytics capabilities:

- View Dashboard Pages. For details, see
- Use wiring between components.
- Change, on demand, the periodicity of a component display
- Extract additional information using FLN
- Drill down to Explorer
- Change, on-the-fly, the display format of the following Dashboard components

Movie: **40_End_User_Features**

Renew your License

In this use case, you will learn how to renew your Business Analytics license using the Maintenance Tool.

For details, see Licenses in the *Administrator Guide*.

Movie: **22_Renew_a_License**

Activate or Deactivate a Data Source

In this use case, you will learn how to activate and deactivate the different Data Sources supported by Business Analytics. The Connect Data Source UI also enables you to edit configurations and test the database connections.

For details, see Connect the Data Sources in the *Administrator Guide*.

Movie: **1_Activate_Data_Source**

Schedule Import Excel File

In this use case, you will learn how to upload data into the Table Repository of the Context Designer using Excel files.

You can schedule the automatic upload of the same Excel file during the import or at a later time.

This feature enables the upload of data without integration with external sources or with other HPE products. The feature can be used to integrate third party data sources, testing, or for Proof of Concept (POC) sessions. You can, in the same way, replace the data in an existing table, or add data to an existing table when the table has been loaded using an Excel file.

For details, see Semantic Layer - Data Loader Scheduler in the *Content Reference Guide*.

Movie: **26_Schedule_Import_Excel_File**

Create a New Business Context

In this use case, you will learn how to create a new Business Context.

Business Analytics enables the importation of data into the Studio using all the out-of-the-box integrations with other HPE products.

In addition, you can import data from custom CSV files into the application and you can use that data for KPIs and Metrics as well.

For details, see Connect the Data Sources in the *Content Reference Guide* or KPI or Metric Formula in the *Business Analyst Guide*.

Movie: **2_Create_New_Business_Context**

Create a New User (Permissions and Roles)

In this use case, you will learn how to create a new role and grant it permissions. Then you will learn how to assign the role to a group of users and how to add a new user to that group. As soon as you create a user and you assign it a Role– you can use that user to log on to Business Analytics.

For details, see Role Management and User Management in the *Administrator Guide*.

Movie: **3_Create_New_User**

LDAP

In this use case, you will learn how to configure LDAP using the LDAP Management wizard so the users configured in LDAP are available in ITBA.

For details, see LDAP Management in the *Administrator Guide*.

Movie: **27_LDAP**

Permissions

This use case shows you how to create and use permissions.

For details, see Role Management in the *Administrator Guide*.

23_Permissions

Dimension Level Permission

In this use case, you will learn how to set permissions at the level of the dimension and entity.

For details, see Dimension Permissions in the *Administrator Guide*.

Movie: **36_Dimension_Permissions**

Create, download, and upload Content Acceleration Packs (CAPs)

In this section you will learn how to create, download, and upload Content Acceleration Packs (CAPs).

For details, see Create Content Acceleration Packs, Activate a CAP, or Upload a CAP to the Business Analytics application in the *Guide to Content Acceleration Packs*.

Movie: **4_Manage_Content_Acceleration_Packs**

Configure the Consolidation

If needed you can consolidate entities.

For details, see Configure Consolidation in the *Administrator Guide*.

Movie: **34_Consolidate_Entities_On_Demand**

Run the ETL

In this use case, you will learn how to run the ETL.

> **Note:** Before running the ETL, make sure you have activated the relevant data source, make sure they are activated.

For details, see Run ETL - Content Flow Management in the *Administrator Guide*.

Movie: **5_Run_the_ETL**

ETL Toolkit

In this use case, you will learn how to use the ETL Toolkit.

For details, see ETL Toolkit in the *Administrator Guide*.

Movie: **52_ETL_Toolkit**

View Data from an External File

In this use case, you will learn how to upload data from an external file and how to schedule the automatic upload of the data into the Business Analytics using Context Designer.

For details, see Semantic Layer - Context Designer in the *Administrator Guide*.

Movie: **26_Schedule_Import_Excel_File**

Embeddability

In this use case, you will learn how to embed an ITBA Dashboard page into another application, and how to navigate from the embedded page back to the BA application.

For details, see Create Content Acceleration Packs, Activate a CAP, or Upload a CAP to the Business Analytics application in the *Guide to Content Acceleration Packs*.

For more details, see Page Gallery and Page Categories in the *Business Analyst Guide*.

Movie: **25_Embeddability**

Entity Report Notification

In this use case, you will learn how to set up the Entity Report to view the changes to the values or states of the ITBA entities.

You will also learn how to schedule to automatically generate the Entity Report for selected Scorecards, Perspectives, Objectives, KPIs, Metrics, KPI Breakdowns, and Metric Breakdowns and to send selected users email notification that include the Entity Report.

To view the movie, click **Help** in the top right corner of the application main page, select the **Movies** option, and select the relevant movie.

For details, see Notifications - Entity Report in the *Administrator Guide*

Movie: **31_Entity_Report_Email_Notification**

Add an Annotation, Send Email, Save as PDF, and Print

In this use case, you will learn how to add an annotation, send an email, save information in PDF format or print information related to a Scorecard, Perspective, Objective, KPI, Metric, KPI Breakdown, or Metric Breakdown.

You can perform these tasks from either the First Level Navigation tooltip in the Dashboard or from within the EXPLORER tab

For details, see Annotations in the *Business Analyst Guide*.

Movie: **6_Add_Annotation_and_Use_Action_Bar**

Filter Components

In this use case, you will learn how to filter the different Dashboard components and how to present the filtered data in a Dashboard page.

You have 2 main options to filter the data presented in the components:

- You can filter each component separately by clicking the Configure Component icon and setting the component configuration according to the support settings.
- You can use the Page Filter component. When you use this component, each selection you make in the Page filter, impacts all the other components in the page.

For details about the Page Filter component, see The Page Filter Component in the *Business Analyst Guide*.

Movie: **8_Filter_Components**

Configure the Calculation Rule for an Objective

In this use case, you will learn how to configure a calculation rule for an Objective.

For details, see Objective Configuration Details in the *Business Analyst Guide*.

Movie: **9_Configure_a_Calculation_Rule_for_an_Objective**

Configure a KPI or Metric Formula

In this use case, you will learn how to configure a KPI or a Metric formula.

For more details, see KPI or Metric Configuration and Calculation Details in the *Business Analyst Guide*.

Movie: **10_Configure_a_KPI_Formula**

Create KPI Breakdowns and Configure Breakdown Override

In this use case, you will learn how to create a KPI Breakdown and configure Breakdown Overrides.

For details, see KPI or Metric Configuration and Calculation Details, KPI Breakdowns, Calculation, or KPI and Metric Breakdown Overrides in the *Business Analyst Guide*

Movie: **11_Create_KPI_Breakdowns_and_Configure_Breakdown_Overrides**

Build a Scorecard Tree and Create a New KPI

In this use case, you will learn how to create a new KPI and build a Scorecard tree.

You can create a Scorecard tree in the Active KPIs pane in 2 ways: either by selecting a Scorecard from one of the Trees in the KPI Library pane and dragging it to Active KPIs pane, or by creating a new Scorecard tree directly in the Active KPIs pane.

For details about the Page Filter component, see Scorecard Configuration Details, Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs, Perspective Configuration Details, Objective Configuration Details, and KPI or Metric Configuration and Calculation Details in the *Business Analyst Guide*.

Movie: **12_Build_a_Scorecard_Tree_and_Create_a_new_KPI**

Create a New Metric

In this use case, you will learn how to create a new Metric.

For details, see KPI or Metric Configuration and Calculation Details, and Calculation in the *Business Analyst Guide*.

Movie: **13_Create_a_New_Metric**

Create Cascading Scorecards

In this use case, you will learn how to create Cascading Scorecards. Cascading Scorecards enable the user to view both a Scorecard and a Cascading Scorecard in a single Scorecard component in a Dashboard page.

To configure the Cascading Scorecards of a specific Scorecard, you must have more than one activated Scorecards in the Active KPIs pane.

To provide the executive with the capability of drilling down to a subordinate's Scorecard, both Scorecards have to be defined in the Studio and have to be active Scorecards.

For details, see Cascading Scorecards in the *Business Analyst Guide*.

Movie: **14_Create_Cascading_Scorecards**

Display and Modify KPI Properties

In this use case, you will learn how to modify a KPI configuration.

For details, see KPI or Metric Configuration and Calculation Details in the *Business Analyst Guide*.

Movie: **15_Modify_a_KPI_Configuration**

Schedule an Automatic KPI Context Calculation

In this use case, you will learn how to schedule an automatic context calculation, so the calculation runs automatically according to your configuration and the data that is presented in the Dashboard is the latest data.

The calculation engine will now run automatically according to your settings.

For details, see Calculation Scheduling in the *Business Analyst Guide*.

Movie: **16_Schedule_Automatic_KPI_Context_Calculation**

Drill Down to Explorer for More Information

In this use case, you will learn how to drill down into Explorer to view more information related to the Scorecard, Perspective, Objective, KPI, Metric, KPI Breakdown, or Metric Breakdown you selected in Dashboard.

The Explorer tab includes configuration details and historical information about the selected item and provides additional research, analytical, and data exploration capabilities. It allows a comprehensive understanding of the available data. The analytical capabilities focus around the Business Analytics main flow entities such as KPIs and Metrics and provides the ability to drill down into the details of the formula used to calculate the KPI or Metric, to see the building blocks of the calculation results, and to analyze the data used for the calculation. In addition, you can also view a tree of nodes that represents the display of the impact of the selected KPI, or KPI Breakdown on the relevant Objectives, Perspectives, and Scorecards.

For details, see Explorer in the *Business Analyst Guide*.

Movie: **37_Explorer**

Forecast

In this use case, you will get a glimpse into the future by forecasting the entity future behavior, based on historical data, of the selected KPI or Metric. This will help you understand more easily the underlying trend and do all you can now to improve or maintain the desired behavior. Forecast is available in the Forecast component that you can add to a Dashboard page or in the Forecast tab of Explorer.

For details, see The Forecast Component in the *Business Analyst Guide*.

For details, see Forecast in the *Business Analyst Guide*.

Movie: **28_Forecast**

What-If for Objectives

In this use case, you will learn how the What-If tab provides a glimpse into the future by forecasting the entity future behavior of the Objective, based on historical data.

For details, see What-If in the *Business Analyst Guide*.

Movie: **49_What_If_For_Objectives**

Breakdown On-Demand

In this use case, you will learn how the What-If tab provides a glimpse into the future by forecasting the entity future behavior of the Objective, based on historical data.

For details, see Change, On-Demand, the Breakdown Display in the *Business Analyst Guide*.

Movie: **49_What_If_For_Objectives**

Create a Dashboard Page and add Components to the Page

In this use case, you will learn how to create a Dashboard page and how to add components to the page.

For details, see Dashboard Page, Page Layout and Components, Page Gallery and Page Categories, and Component Gallery and Component Categories in the *Business Analyst Guide*.

Movie: **7_Create_a_New_Dashboard_Page**

Movie: **30_Dashboard_Page_Components**

Sorting in the Scorecard Component

In this use case, you will you will learn how to sort the Perspectives, Objectives, and KPIs in Scorecard components.

For details, see Scorecard - Configure Component Dialog Box in the *Business Analyst Guide*.

Movie: **33_Sorting_in_the_Scorecard_Component**

SM and SM_Demo CAPs

In this use case, you will see how demo data provided by the demo CAP is used to demonstrate a user story.

For details, see SM Content Acceleration Pack in the *Guide to Content Acceleration Packs*.

Movie: **41_SM_and_SM_Demo_CAPs**

PPM and PPM_Demo CAPs

In this use case, you will see how demo data provided by the demo CAP is used to demonstrate a user story.

For details, see PPM_Demo and PPM Content Acceleration Packs in the *Guide to Content Acceleration Packs*.

Movie: **42_PPM_and_PPM_Demo_CAPs**

ALM and ALM_Demo CAPs

In this use case, you will see how demo data provided by the demo CAP is used to demonstrate a user story.

For details, see ALM_Demo and ALM Content Acceleration Packs in the *Guide to Content Acceleration Packs*.

43_ALM_and_ALM_Demo_CAPs

CSA and CSA_Demo CAPs

In this use case, you will see all the Dashboard pages provided by the demo CAP displaying data from CSA, AWS, and AWSCW.

For details, see CSA_Demo and CSA Content Acceleration Packs in the *Guide to Content Acceleration Packs*.

Movie: **47_CSA_and_CSA_Demo_CAPs**

AM and AM_Demo CAPs

In this use case, you will see how demo data provided by the demo CAP is used to demonstrate a user story.

For details, see AM_Demo and AM Content Acceleration Packs in the *Guide to Content Acceleration Packs*.

Movie: **48_AM_and_AM_Demo_CAPs**

SA and SA_Demo CAPs

In this use case, you will see how demo data provided by the demo CAP is used to demonstrate a user story.

For details, see SA_Demo and SA Content Acceleration Packs in the *Guide to Content Acceleration Packs*.

Movie: **50_SA_and_SA_Demo_CAPs**

GUI Installation

In this use case, you will see how to install ITBA using a GUI installation.

For details, see the *Installation Guide*.

Movie: **44_GUI_Installation**

Silent Installation

In this use case, you will see how to install ITBA using a silent installation.

For details, see the *Installation Guide*.

Movie: **45_Silent_Installation**

Console Installation

In this use case, you will see how to install ITBA using a console installation.

For details, see the *Installation Guide*.

Movie: **51_Console_Installation**

Upgrade

In this use case, you will see learn how to upgrade from ITBA 10.00 to ITBA 10.10.

For details, see the *Upgrade Guide*.

Movie: **54_Upgrade**

Migration

In this use case, you will see learn how to migrate from XS 9.50 to ITBA 10.10.

For details, see the *Migration Guide*.

Movie: **55_Migration**

Optional - Install BOE on a Linux Server

In this use case, you will see learn how to install BOE on a Linux Server.

For details, see the *Installation Guide*.

Movie: **58_Optional_Install_BOE_on_a_Linux_Server**

Optional - Install BOE on a Windows Server

In this use case, you will see learn how to install BOE on a Windows Server.

For details, see the *Installation Guide*.

Movie: **59_Optional_Install_BOE_on_Windows**

Use Case - View Data from External Data Sources

This section presents the high level end -to-end flow you can follow to view your Scorecards and KPIs in the IT Business Analytics Dashboard. The data displayed in the Dashboard is based on data from the relevant data sources.

Prerequisite:

1. Read the *Release Notes* available on the Installation DVD. The document includes release notes, getting started information, installation and upgrade information, and troubleshooting notes.
2. Install Business Analytics and run the post-install wizard. For details, see the *Installation Guide* (interactive document) available on the Installation DVD.
3. Set up the users, permissions, and other general settings. For details, see Getting Started with Administration Tasks in **General Administration** in the online documentation library or in the *Administrator Guide*.

Install the Content Packs

To install a Content Pack:

1. Select **Admin > Data Management > Install Content Pack**.
2. Click **Install** for the relevant Content Pack.

   The status is changed to **Upgrade** and the date of the installation is set in the **Operation Date** column.

Perform the integration with the Data Sources:

Watch the movie **1_Activate_Data_Source**.

To view the movie, click **Help** in the top right corner of the application main page, select the **Movies** option, and select the relevant movie.

For details, see Connect the Data Sources in the *Administrator Guide*.

The supported integrations are:

- Integration with ALM
- Integration with AWS
- Integration with AWSCW
- Integration with CSA
- Integration with PPM
- Integration with SM

Run the corresponding ETL

Watch the movie **5_Run_the_ETL**.

To view the movie, click **Help** in the top right corner of the application main page, select the **Movies** option, and select the relevant movie.

For details, see Run ETL - Content Flow Management in the *Administrator Guide*.

Activate the CAPs

If needed you can activate CAPs.

Watch the movie **4_Manage_Content_Acceleration_Packs**.

To view the movie, click **Help** in the top right corner of the application main page, select the **Movies** option, and select the relevant movie.

For details, see Content Acceleration Packs (CAPs) in the *Guide to Content Acceleration Packs*.

You can now review the out-of-the-box Scorecards, Perspectives, Objectives, and KPIs, customize them, create Dashboard pages, and more. For details, see Getting Started with the Studio and Dashboard

Use Case - IDE - Overview

In this section you will learn about the ITBA DWH IDE. The DWH IDE provides the means to extend and develop DWH content.

DWH content is comprised of a set of Staging Area Data models, Target Area Data models and an ETL (Extract Transform Load) process. The ETL is aimed at moving and transforming data entities from the data source entities format to the Target Data model structure.

The eclipse tool contains 4 major areas:

- **Workspace:** The center of the screen is the canvas where you create models in the Stream Designers.
- **Project Explorer:** Contains the available projects.
- **Palette area:** Contains the tools for creating your content.
- **Tabs:** Contains the tabs with various property and error information.

Stream Designers:

The IDE provides two main levels of metadata modeling: The Architect Target Designer and the Engineer Stream Designer. The Architect Target Designer enables the user to model the DWH Target entities and the relations between them. The Engineer Stream Designer enables the user to create the sequence of models for data to be mapped from the source model to the target entity model.

To the right of the canvas is the palette which contains the set of tools used to design in the Designer.

To the left of the canvas, the package explorer contains a set of out of the box content packs. This is where all the content loaded into the IDE can be found.

The bottom area contains additional tabs such as the ‘problems’ view which provides indications of model validation errors and the properties view which enables the configuration of entity attributes and properties.

Usually, when starting the development of an entity, you begin with developing the Architect Target Designer, designing the new target schema and then you develop the Engineer Stream Designer, loading the target entity you created earlier and connecting to the data source schema.

The Target Entity is comprised of Fact and Dimension tables, which can be linked to associated dimensions.

The Source Entity is the actual and accurate representation of an entity to be extracted from the source. It is automatically generated according to integration entity design.

The Integration Entity is a Source Table representation.

Use Case - IDE - Develop a New Entity

In this section you will learn how to develop a new entity using the IDE. The development scope includes the full content development track – from source to target . In this movie it is required to create a new fact table since the requested measurements do not exist in the OOTB scheme, therefore we will start with creating the Stream Target Designer and then move to the Engineer context.

The data that used in this example comes from PPM.

Let’s start with the importing of the relevant Content Packs.

1. Open the Eclipse IDE.
2. From the top menu select **File** > **Import**.
3. Under the General directory select **Existing Projects into workspace** and click Next.
4. Browse for the cp-core directory and click **OK**, click **Finish** to import the project.
5. Repeat these steps for cp-ppm and cp-ppm-9.1-oracle content packs.

The next step is to create two new logical projects: Architect_Context and Engineer_Context

1. From the top menu select **New** > **Project**, expand the **General** directory, select **Project** and click **Next**. Enter the name Architect_Context and click **Finish**.
2. The project for storing the Stream Target Designer diagram is created and displayed in the Package Explorer.

   Repeat this procedure to create the Engineer_Context.

Now you can start designing the Architect Target Designer.

1. From the Package Explorer pane, select the Architect_Context directory you just created.
2. Right-click and select **New** > **Architect Target Designer**.
3. Enter a file name, in this case :PROJECT_STATUS_CSTM.architectcontext_diagram and click **Next**.
4. Click **Browse** and select **cp-core** and click **OK**.
5. Click **Finish** to finalize the context creation.
6. In the palette area on the right side, select **New Target Entity** and click in the canvas.
7. Enter an entity name (‘PROJECT_STATUS_CSTM’) and click **Enter**.
8. In the Properties tab select **General** and select the **Fact** checkbox.
9. Add a Target column by clicking **Target Column** in the palette area and click in the PROJECT_ STATUS_CSTM entity frame.
10. For each column click **Target Column** and click in the PROJECT_STATUS_CSTM entity area and enter the name of the column.
11. Double-click **Load Target Entity** (in the palette area).
12. Expand the Core directory and select PERIOD/ Period entity and click **OK**.
13. Repeat this step and select PROJECT/ Project entity.

14. Create a link between the Fact you created and the Dimensions you loaded in the previous step by selecting **Fact to Dimension** in the palette area. Drag the arrow from the Fact column in the entity to the Dimension you want it linked to.
15. Create another link between the Fact and the Period dimension.
16. In the Properties tab select **Columns** and set the **Length** of each column to **255** and the **Measure** to **True**.
17. Save the configurations.

The design of Architecture context diagram is complete.

Now, you are ready to create the Engineer_Context.

1. From the Package Explorer pane select the Engineer_Context directory you created before, right click and select **New** > **Engineer Stream Designer** and click **Next**.
2. Enter a file name for the Engineer Diagram (in this case PROJECT_STATUS_ CSTM.engineercontext_diagram) and click **Next**.
3. Select **cp-core** as the Target CP directory, **cp-ppm** as the Integration CP directory and **cp-ppm-9.1-oracle** as the Source CP directory and click **Finish**. The Engineer diagram is created and automatically opens.
4. In the palette area, click **Load Target Entity**, expand the Core directory and select the Target entity you created earlier and click **OK**. The Target Entity is displayed.

The next step is to create a New Integration Entity.

1. In the palette area, click **New Integration Entity**, click in the canvas and enter a name.
2. In the palette area, click **Integration Column** and click inside the Integration Entity and enter the column name.The column names must be exactly the same as in the source table.
3. In the Properties tab, select **Columns** and in the **Data Type** column, set the **Data Type**, **Length** and **Business Key** accordingly
4. Save the configurations.

Create SSI mapping between the Integration entity and Target entity

1. In the palette area, click **Column Mapping** and drag a line between PROJECT_ID and PROJECT.
2. Once the link is created a new entity is displayed: PPM – PROJECT_STATUS CTSM Transformation.

3. Continue creating SSI mapping links accordingly between the Integration Entity and the Transformation Entity.
4. Save your configurations.

Create a New Source Entity

1. In the palette area, click **New Source Entity** and click in the canvas.
2. Create a link between the New Source Entity and the Integration Entity, click **Source to Integration Relation** in the palette area and drag the display arrow from the Source to the Integration.
3. The name of the New Source Entity is automatically updated to PPM.9.1.oracle.PM_PROJECT_RLP_CSTM.
4. In the Properties tab, select **Columns** and update the table name for all the records with the original table name as it appears in the Data source DB.
5. In the Properties tab, select **General** and add the table name to the **Table Name/Join Condition** and save.

The next step will be to generate the ETL.

Customize KPIs, Metrics, Formulas, Filters, and Breakdowns

ITBA enables you to customize KPIs as follows:

You can:

- Activate KPIs by dragging KPI templates from the KPIs Library pane to the Active KPIs pane in the Studio. For details, see Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates in the *Business Analyst Guide*.
- Create KPIs by cloning existing active KPIs. For details, see Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs in the *Business Analyst Guide*.
- Customize a formula or filter. For details, see KPI or Metric Formula or KPI or Metric Filter in the *Business Analyst Guide*.
- Customize a KPI's Context. For details, see KPI or a Metric Business Context in the *Business Analyst Guide*.
- Enrich the Dashboard contents with Metric Breakdowns and KPIs, overrides, Cascading Scorecards, and more. For details, see Enrich the Dashboard Contents in the Studio in the *Business Analyst Guide*.
- Create and manage Breakdowns for a KPI or a Metric according to the KPI or a Metric dimensions. For details, see KPI Breakdowns or Metric Breakdowns in the *Business Analyst Guide*.

  When you configure a KPI Breakdown, its configuration (for example, formula, or period) is the same as the parent KPI's configuration. You may want to have a different threshold or owner for specific "branches" of the KPI Breakdowns. In addition, you may want to change the thresholds of some of the KPI Breakdowns. For details, see KPI and Metric Breakdown Overrides in the *Business Analyst Guide*.
- Add information to a KPI. That information can be a link to a relevant Dashboard page, an external URL, a BO report that provides more information about the KPI, an Xcelsius report configured in the system. This additional information can help the Executive by providing external information related to a KPI, or more details about the KPI value, status, and score, in the right pane of the EXPLORER tab. For details, see KPI or Objective Additional Information in the *Business Analyst Guide*.

Customize Objectives, Perspectives, Scorecards and Pages

You can also customize the following:

- **Objectives, Perspectives, or Scorecards.** For details, see Objective Configuration Details, Perspective Configuration Details, Scorecard Configuration Details, or Objective's KPIs in the *Business Analyst Guide.*
- **Dashboard Pages.** For details, see Dashboard Page or Page Layout and Components in the *Business Analyst Guide*.

How to Find Information

This section includes:

Documentation Library

Business Analytics Help Center documents for this version are available with the download of the version from the HPE Software Support Online web site (https://softwaresupport.hp.com/group/softwaresupport/home) or on the DVD.

This version includes the following documents:

Release Notes Includes last minute information, fixed issues, and limitations. **Access:***Release Notes* in PDF format in the DVD or Support Site.	**Support Matrix** Describes hardware requirements, software requirements, and supported environments. **Access:***Support Matrix* in PDF format in the DVD or Support Site.	**Installation Guide** The *Installation Guide* enables you to install Business Analytics. **Access:***Installation Guide* in PDF format in the DVD or Support Site.
Security Guide Includes information on extending content and developing new content using the Integrated Development Environment (IDE). **Access:** *Security Guide* in PDF format in theSupport Site.		**Migration Guide** Describes how to upgrade the application from XS 9.50 to ITBA 10.10. **Access:***Migration Guide* in PDF format in the DVD or Support Site.

Getting Started Guide Provides useful information for getting up and running with the application. **Access:***Getting Started* in PDF format	**Administrator Guide** Describes the application's Administration tasks. **Access:** *Administrator Guide* in PDF format	**Business Analyst User Guide** Describes how to work with the Studio and the Dashboard to create and activate Scorecards, Perspectives, Objectives, Metrics, and KPIs, and to display the relevant information. **Access:** *Business Analyst Guide* in PDF format
Content Reference Guide Provides the integration procedure with the relevant data source, reference information on Contexts (universes), links to the relevant out-of-the-box KPIs and Metrics, Web intelligence and operational reports if available. **Access:** *Content Reference Guide* in PDF format	**CAPs Guide** Provide details about Content Acceleration Packs (CAPs). The CAPs are ready-to-import packages that include Dashboard pages that display Scorecards and components, KPIs, Metrics, Contexts (universes), data (.CSV files), and documentation for the CAP. The document includes details about: the VP of Ops, VP of Apps, ALM_Demo and ALM, AM_Demo and AM, CSA_Demo and CSA, PPM_Demo and PPM, SM_Demo and SM Content Acceleration Packs (CAPs). CAPs describe typical stories that show how the correct implementation of Business Analytics drives Performance Improvement and Cost Reduction for the IT organization. Documentation specific to the relevant CAP is accessible from the CAP user interface. **Access:** *Guide to Content Acceleration Packs* in PDF format	**ETL Process and Architectural Overview** Provides a graphic representation of the ETL process and its architecture. **Access:** *ETL Process and Architectural Overview* in PDF format
KPIs and Metrics List Out-of-the-box KPIs and Metrics and their description are available for each integration in the	**List of Entities** Provides a list of the available Dimension and Fact entities for the OOTB Data Warehouse Content Packs. **Access:** List of Entities in *Content*	**Data Usage Overview** Provides a graphic representation of how data is used in Business Analytics.

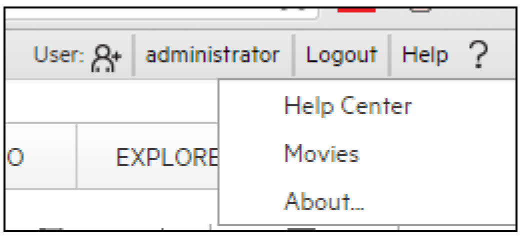
Content Reference Guide. The KPIs and Metrics, their description, business motivation, formula, context, and more are available in the List of KPIs and Entities in Excel format. **Access:** List of KPIs and Entities in Excel format or *Content Reference Guide* in PDF format	*Reference Guide* in PDF format	**Access:** *Data Usage Overview* in PDF format
Open Source and Third Party Software License Agreements Contains the license information for open source and third-party software included in Business Analytics. **Access:** *Open Source and Third Party Software Licenses* in PDF format	**Error Messages** The Error Messages document contains a partial list of error messages. **Access:***Error Messages* in PDF format Troubleshooting information and knowledgebase articles are provided in the Support site. **Access:** Available in the HP Software Support Online web site at: http://www.hp.com/go/hpsoftwaresupport	
Advanced Guides		
Content Extension Guide Includes information on extending content and developing new content using the Integrated Development Environment (IDE). **Access:** *Content Extension Guide* in PDF format in theSupport Site.	**DCS Extractor SDK Guide** Includes information on extending the DCS framework with a new custom DCS extractor. **Access:** *DCS Extractor SDK Guide* in PDF format in the Support Site.	**FIPS 140-2 Compliance Statement** **Access:** *FIPS 140-2 Compliance Statement* in PDF format

Access the Online Help Pages Relevant to the Currently Displayed UI Page

How to access the online help depends on where you are in the application.

General Online Help

To access the general online help (the complete Documentation Library), click **Help** in the top right corner of the application display, then select **Help Center**.



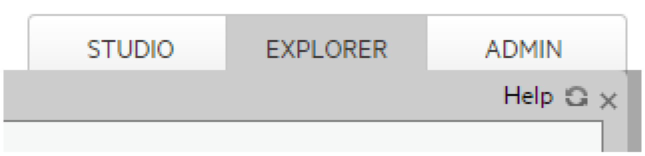
ADMIN tab Online Help

- To access the online help for the relevant page in the **ADMIN** tab, open the relevant page using the accordion tabs and their menu options, and click **Help** in the top right corner of the page.

- To access the online help for dialog boxes that are opened from the ADMIN tab pages, click the **Help** button at the bottom of the dialog box. If the dialog box does not have a Help button, its documentation is included in the main page documentation accessed by clicking **Help** in the top right corner of the page.

EXPLORER tab Online Help

To access the online help in the **Explorer** tab, click **Help** in the top right corner of the page.

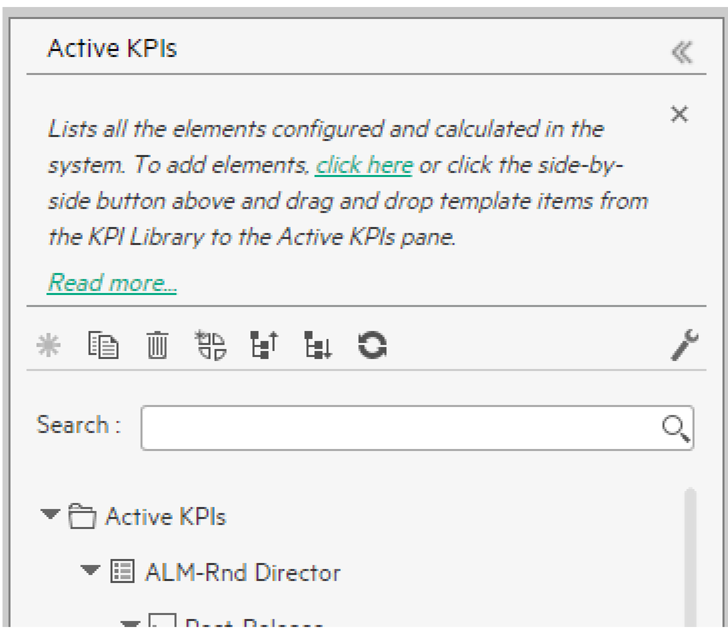


STUDIO tab Online Help.

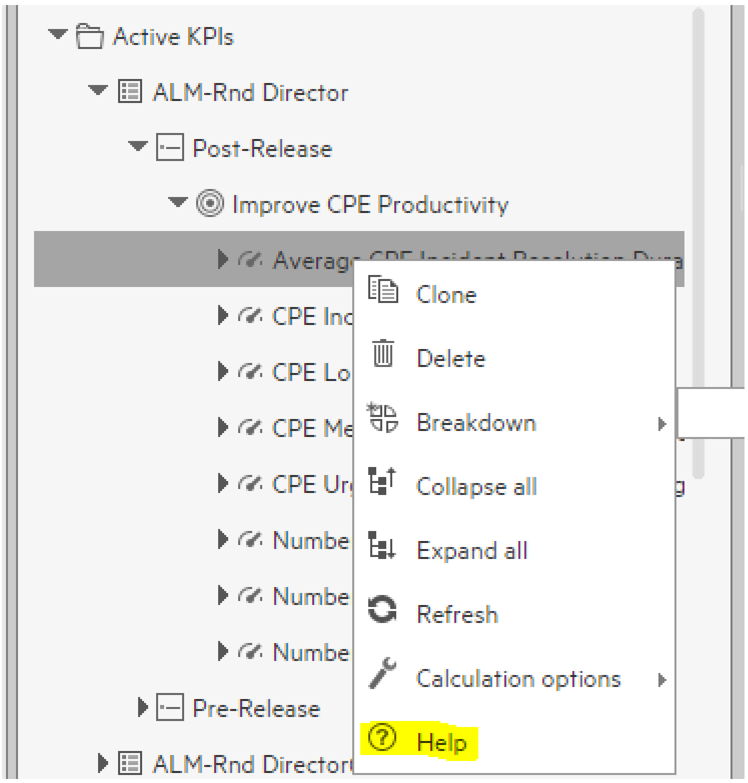
To access the online help in the **Studio** tab:

- Click the STUDIO tab and click **Help** in the top right corner of the page to display general information about the Studio and how to work with it.

- Click **Read more...** in the top area of the **KPI Library** or **Active KPIs** pane to access the online help for these panes.



- Right-click any item (Scorecard, Perspective, Objective, KPI, Metric, Folder, and more) in the tree of the **KPI Library** or **Active KPIs** pane to display a menu, and then select the Help menu item to display the online help for the item.

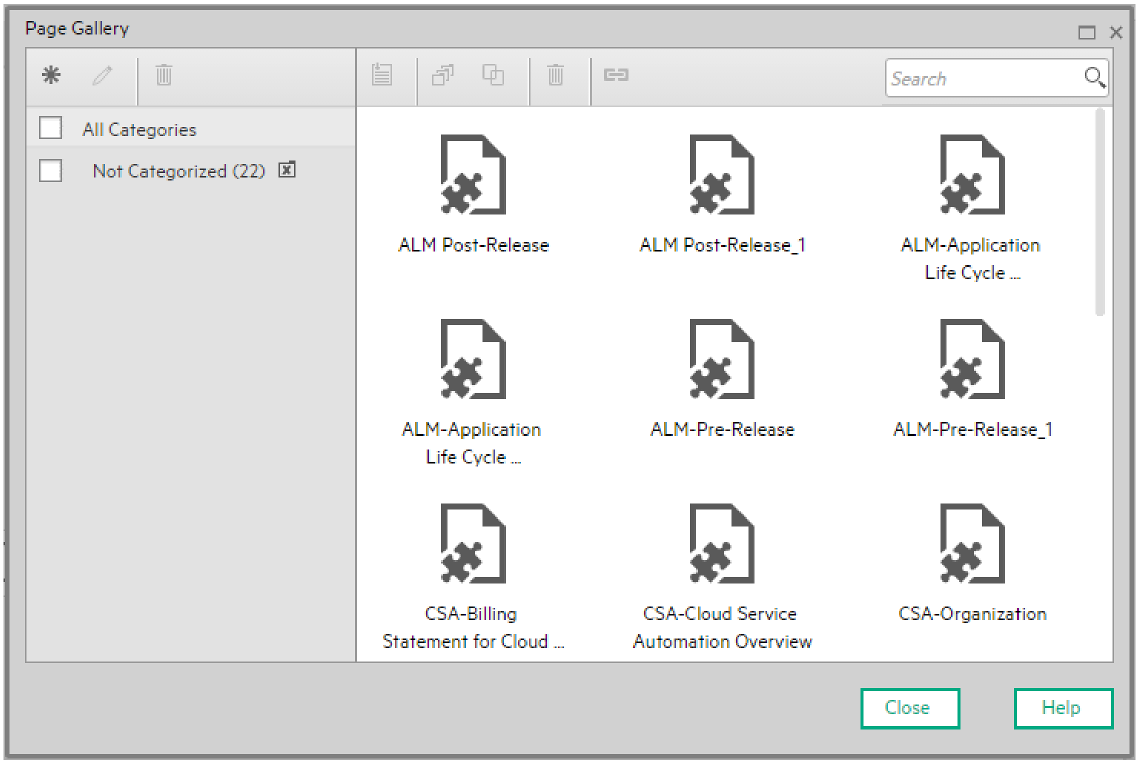


- Click **Help** in the top right corner of the dialog box to display the relevant online help.

Dashboard Online Help

To access the online help in the **Dashboard**:

- Close all tabs and click the relevant icon in the top right corner of the Dashboard page and click the **Help** button at the bottom of the dialog box that opens to display the online help for the dialog box.



- Click the  icon in the component toolbar to display the online help for the component.

Send Feedback

We welcome your comments!

At the bottom of each page in the online help, click the **Send documentation feedback to HP** link to open a window that explains how to send us your feedback regarding the currently open documentation page. Follow the instructions and send us your feedback.

Documentation Updates

Business Analytics documentation is also available on the HPE Software Support Online web site (https://softwaresupport.hp.com/group/softwaresupport/home) site.

To check for recent updates or to verify that you are using the most recent edition of a document, go to:

HPE Software Support Online web site (https://softwaresupport.hp.com/group/softwaresupport/home)

This site requires that you register for an HP Passport and sign in. To register for an HPE Passport ID, go to:

http://h20229.www2.hp.com/passport-registration.html

Or click the **New users - please register** link on the HPE Passport logon page.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HPE sales representative for details.

To replace the current documentation in your system with the recently updated documentation obtained from the Manual site, proceed as follows:

- Copy the online help to the **$HPBA_Home/docs/<language_country code>**\directory where <language_country_code> is: **en_US** for English language documentation and ja_JP for Japanese language documentation.
- Copy the PDFs to the **$HPBA_Home/docs/docs/<language_country code>/pdfs/** directory where <language_country_code> is: **en_US** for English language documentation and ja_JP for Japanese language documentation.

Additional Information

HPE Software Support Online

HPE Live Network

HPE Software Solutions and Integrations

Forum Discussions:

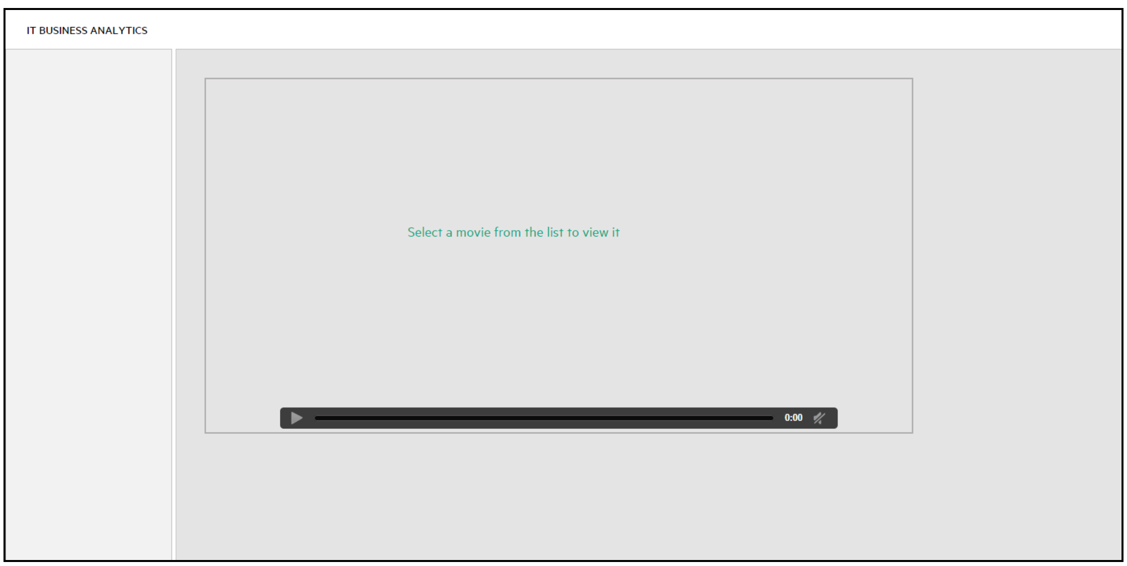
- https://hpln.hpe.com/node/10214/og/forum/373

Access Movies

To access the out-of-the-box movies:

1. In one of the supported browsers, click **Help** in the top right corner of the application main page and select the **Movies** option.

   The following page opens:



2. Select the relevant movie in the list to display the contents.

Note: If you are working with Internet Explorer 9 and do not see the movie, make sure that the Compatibility View is off (indicated by the icon in the Explorer page).

For details about the movie scripts, see Common Use Cases in *Getting Started*.

Movies are also available at: http://www.youtube.com/user/eScorecard

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Feedback on Getting Started Guide (IT Business Analytics 10.10)

Just add your feedback to the email and click send.

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