HP IT Executive Scorecard

Software Version: 9.50
Windows ® operating system

Content Reference Guide for the Integration with HP Project and Portfolio Management

Document Release Date: February 2015
Software Release Date: June 2014



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PPM Data Source - Integration, Associated Contexts, KPIs, Metrics, and Data Lineage

This document describes the integration, contexts, KPIs, Metrics, data lineage, and reports associated with the integration with the HP Project and Portfolio Management data source.

HP Project and Portfolio Management (PPM) Software provides an integrated platform for planning, staffing and monitoring Agile development projects, as well as managing application quality. PPM Center offers a consolidated view of all IT activities so that management has better visibility into the portfolio, more effective controls, greater flexibility in applying automated processes, and better-defined quality standards.

Note: Information about the ALT data source and more general content issues are detailed in the *IT Executive Scorecard Content Reference Guide for the Integration of Alternate Data Sources*.

Data Lineage

For details on how to understand the data lineage graph, see Data Lineage in the *IT Executive Scorecard Content Reference Guide*

PPM Data Source

The purpose of the integration of PPM as a data source is to bring quality management information into the Data Warehouse.

To access:

Select **Admin > Data Source Management** then click **Add data source** and select **PPM** to activate the integration processes for the **PPM** data source.



Learn More

Content Packs and their functionality

To learn about Content Packs and their functionality see, Data Source Management in the *IT Executive Scorecard Administrator Guide*.

Important Information

- The PPM Content Pack supports multiple instances.
- **FBI Integration:** An extractor using the File Based Integration mechanism that extracts entities from the source and generates corresponding flat files. For details. see File Based Integration (FBI) in the *IT Executive Scorecard Administrator Guide*.
- All fields are case-sensitive.

Tasks

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Activate the Integration

1. Select **Admin** > **Data Source Management** then click **Add data source**.
2. The Add Data Source page opens. Select the **PPM** data source type.
3. Select or enter the configuration parameters.
4. Click **Next** to proceed to the validationpage.

Note: To perform configuration and activation tasks using the Automation tool, seeThe Automation Tool in the *IT Executive Scorecard Administrator Guide*.

PPM Customization

PPM Demand Management provides system parameter fields. You can change name and data length of these parameter fields in PPM Demand Management, depending on your purpose and requirements.

To support all customers' KPIs, all PPM customized fields of Demand Management are populated to the Data Warehouse and added as place holders in the universe. You can use these fields in XS KPI formulas.

Related Dimension Tables and Views

Dimension tables which reference REQUEST_DIM:

- REQUEST_HEADER_PLHD_DIM in DWH for source table KCRT_REQ_HEADER_DETAILS
- REQUEST_DETAIL_PLHD_DIM in DWH for source table KCRT_REQUEST_DETAILS
- REQUEST_USERDATA_PLHD_DIM in DWH for source table KCRT_REQUESTS

Based on these dimension tables, the following views filter invalid data:

- REQUEST_HEADER_PLHD_DIM_V
- REQUEST_DETAIL_PLHD_DIM_V
- REQUEST_USERDATA_PLHD_DIM_V

The PPM Customization Universe is based on these views.

To perform PPM customization for Demand Management:

1. Open the PPMCustomization universe in Universe Designer, the following classes are displayed:
   - Request_Header_Custom_Parameters (contain customized parameter fields of REQUEST_HEADER_PLHD_DIM, source table is KCRT_REQ_HEADER_DETAILS)
   - Request_Detail_Custom_Parameters (contain customized parameter fields of REQUEST_DETAIL_PLHD_DIM, source table is KCRT_REQUEST_DETAILS)
   - Request_User_Configured_Data (contain customized parameter fields of REQUEST_USERDATA_PLHD_DIM, source table is KCRT_REQUESTS)
2. You can change the "Name" and "Select" statement of objects to apply your PPM customization.

   Example Customized Request parameters for BusinessRequest:

   - BusinessName is mapped to Visible_Parameter5 of KCRT_REQ_HEADER_DETAILS table with Batch_number=1

- ActualStartDate is mapped to Visible_Parameter6 of KCRT_REQUEST_DETAILS table with Batch_number=3.
- Stage is mapped to User_Data2 of KCRT_REQUESTS.

Under Request_Header_Custom_Parameters:

a. Double click Visible_Parameter5 and change Select to:

CASE XS.REQUEST_HEADER_PLHD_DIM_V.Request_Type

WHEN "BusinessRequest"

THEN (CASE XS.REQUEST_HEADER_PLHD_DIM_V.Batch_number

WHEN 1 THEN (XS.REQUEST_HEADER_PLHD_DIM_V.Visible_Parameter_05) ELSE NULL END

ELSE NULL END

b. Change Name from Visible_Parameter05 to BusinessName

Under Request_Detail_Custom_Parameters:

In PPM you can add unlimited parameters in KCRT_REQUEST_DETAILS by batch_number column.

When batch_number=1, parameter1 to parameter50 stands for parameter1 to parameter50.

when batch_number=2, parameter1 to parameter50 stands for parameter51 to parameter100.

when batch_number=3, parameter1 to parameter50 stands for parameter101 to parameter150.

Therefore, there is 1-N relationship between REQUEST_DIM and REQUEST_DETAIL_ PLHD_DIM. To make it a 1-1 relationship, use aggregation function Group By. You also need to apply the aggregation function in the XS view.

Go to XS.REQUEST_DETAIL_PLHD_DIM_V in Target Database, make changes as follows:

ALTER VIEW [XS].[REQUEST_DETAIL_PLHD_DIM_V] AS

SELECT

REQUEST_DURABLE_KEY

MAX(CASE REQUEST_DETAIL_PLHD_DIM. Request_Type

WHEN "BusinessRequest"

THEN (CASE REQUEST_DETAIL_PLHD_DIM.Batch_number

WHEN 3 THEN (REQUEST_DETAIL_PLHD_DIM.Visible_Parameter_06) ELSE NULL END)

ELSE NULL END) [ActualStartDate]

FROM dwt.REQUEST_DETAIL_PLHD_DIM

WHERE DEACTIVATORS = 'Y' AND MD_TRANSLASTIND = 'Y'

Group by REQUEST_DURABLE_KEY

then REQUEST_DETAIL_PLHD_DIM_V has a 1-1 relationship to REQUEST_DIM_V.

Go to Universe Designer:

a. Under Request_Detail_Custom_Parameters, delete all objects, refresh data structure.
b. Add a new class with the name ActualStartDate.
c. Change select to: cast(XS.REQUEST_DETAIL_PLHD_DIM_V.ActualStartDate as Date)

   This solution allows that REQUEST_DIM is not duplicated when it joins with REQUEST_DETAIL_PLHD_DIM, and does not affect any other dimension tables.

Under Request_User_Configured_Data:

a. Double click User_Data02.
b. Change Name from User_Data02 to Stage.
c. After all changes have been made, you can use the attributes "BusinessName", " ActualStartDate " and "Stage" for KPI formulas.

For details on how to create an active KPI in the XS studio, see Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates in the *IT Executive Scorecard Business Analyst Guide*.

Fill exchange rate for PPM

PPM only contains the exchange rate from its base currency to other currencies. If you also need to use the exchange rates from other currency to the PPM base currency, especially from the Data Warehouse base currency to the PPM base currency you an use AM/ALT exchange rate.

Data Warehouse applies, in calculations, the exchange rate by source priority, and by default, the priority is AM, then PPM, and then ALT.

For example, if AM includes the exchange rate from the DWH base currency to the PPM base currency, DWH uses that exchange rate to perform the calculations in COST_BASE of ACTUALCOST and PLANNEDCOST. If AM and PPM do not include that information, DWH uses the exchange rate of ALT.

To use the exchange rate, do one of the followings:

- If the AM data source is already activated, make sure it includes the exchange rate from the DWH base currency to the PPM base currency.
- If the AM data source is not activated, then activate the ALT source and make sureincludes the exchange rate from the DWH base currency to the PPM base currency. You can fill in **<XS_ ROOT>\agora\ContentPacks\ALT\ETL\flatfiles\ALT_EXCHANGE.xls** to populate the required exchange rate you want. Remember to keep this file updated when the exchange rate changes.

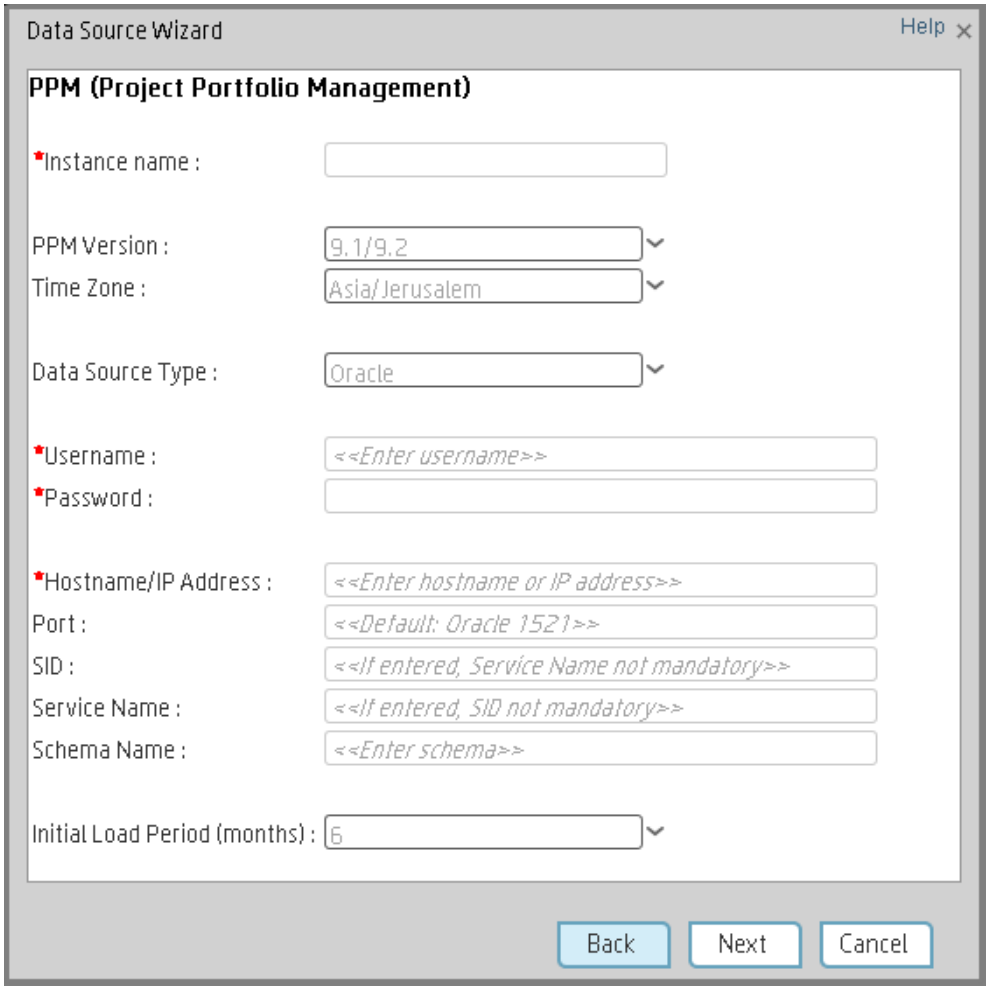
Consolidate PPM and ALM

If you are integrating ALM and PPM data sources, the consolidation process between ALM and PPM identifies ALM releases as child- projects of PPM projects.You can map which release of the ALM domain is connected to the specific PPM project. The manual mapping must be performed before running ETL. For details, see ALM Data Source in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Application Lifecycle Management*.

UI Description

PPM Activation Page

The data warehouse is connected to HP Project and Portfolio Management through high-level integration processes. A set of database views enables the extraction of the main PPM objects.



Mandatory fields are marked with a red asterisk.

User interface elements are described below:

Note: The Oracle database can have both Server ID (SID) and Service Name properties, but the user should specify only one. If you define the SID, then the SID is used, and if you define Service Name, then Service Name is used. If you define both in the UI, only SID is used.

UI Element	Description
Instance name	Enter a name for the data source instance you are activating.

UI Element	Description
PPM Version	Select the relevant PPM version. For details, see the *IT Executive Scorecard Support Matrix*.
Time Zone	Select the time zone for the data source.
Data Source Type	PPM can be run only on Oracle.
Username	Enter your username used to log on to the PPM database.
Password	Enter your password used to log on to the PPM database.
Hostname/IP Address	Enter the Oracle server database hostname or IP address.
Port	Port for database connections.
SID	Enter the unique name of the database.
Service Name	Enter the alias used when connecting.
Schema Name	Enter the name of the Schema.
Initial Load Period (months)	Select the number of months from which you want the initial data loaded.



List of Entities

Dimensions that are filled by XLSs:

- Budget
- Cost Category

List of Entities in Excel format

This document is available in the PDFs directory in the Installation DVD, is accessible from the Help Center page in the online Help Center (documentation library), or from the HP Software Product Manual Site (http://h20230.www2.hp.com/selfsolve/manuals).

Project Portfolio Management (PPM) Context

Project Portfolio Management ensures that the IT Projects are managed in an appropriate way and that the organization investment is aligned to its strategic objectives and business goals. This insight can help executives focus on their project's execution .

HP Project and Portfolio Management is the data source used by this Context (universe).

The following universe contains the attributes and classes that relate to PPM.

To access:

In Executive Scorecard, click **Admin > Semantic Layer > Semantic Layer**. In the Context Management page, click **Launch Context Designer**. In the Context Designer page, click **Open an existing context**, and select the Context.

Tasks | Reference

Tasks

Display the Context

1. In Executive Scorecard, click **Admin > Semantic Layer > Semantic Layer**. The Context Management page opens.
2. The list of out-of-the-box Contexts is displayed.
3. Click **Launch Context Designer**.
4. In the Context Designer page that opens, click **Open an existing context**.
5. Select the relevant Context.

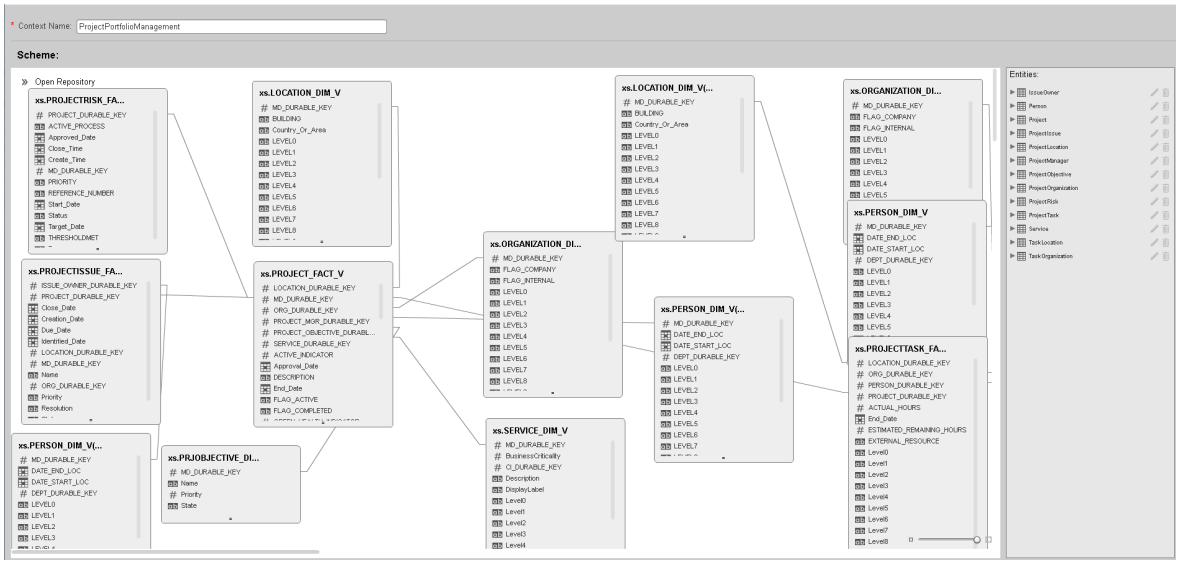
   The structure of the Context is displayed.

For additional details about Context Designer, see Semantic Layer - Context Designer in the *IT Executive Scorecard Administrator Guide*.

Reference

Context Tables and Structure

The context includes the following tables and relationships:



Statistics

Entity Count	Field Count	Table Count	Alias Count	Join Count
13	154	13	4	12

Model Structure

The table lists all the views and fields included in the model even when the corresponding objects have not been selected to be part of the corresponding Context.

Table Name	Name	Type
XS.LOCATION_DIM_V	Country_Or_Area	nvarchar
XS.LOCATION_DIM_V	Locality	nvarchar
XS.LOCATION_DIM_V	MD_DURABLE_KEY	numeric
XS.LOCATION_DIM_V	Name	nvarchar
XS.LOCATION_DIM_V	PARENT_DURABLE_KEY	numeric
XS.LOCATION_DIM_V	POSTAL_CODE	nvarchar

Table Name	Name	Type
XS.LOCATION_DIM_V	Region	nvarchar
XS.LOCATION_DIM_V	Type	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL0	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL1	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL2	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL3	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL4	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL5	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL6	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL7	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL8	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL9	nvarchar
XS.ORGANIZATION_DIM_V	MD_DURABLE_KEY	numeric
XS.ORGANIZATION_DIM_V	Name	nvarchar
XS.PERSON_DIM_V	DATE_END_LOC	datetime
XS.PERSON_DIM_V	DATE_START_LOC	datetime
XS.PERSON_DIM_V	DEPT_DURABLE_KEY	numeric
XS.PERSON_DIM_V	LEVEL0	nvarchar
XS.PERSON_DIM_V	LEVEL1	nvarchar
XS.PERSON_DIM_V	LEVEL2	nvarchar
XS.PERSON_DIM_V	LEVEL3	nvarchar
XS.PERSON_DIM_V	LEVEL4	nvarchar
XS.PERSON_DIM_V	LEVEL5	nvarchar
XS.PERSON_DIM_V	LEVEL6	nvarchar
XS.PERSON_DIM_V	LEVEL7	nvarchar
XS.PERSON_DIM_V	LEVEL8	nvarchar
XS.PERSON_DIM_V	LEVEL9	nvarchar

Table Name	Name	Type
XS.PERSON_DIM_V	LOCATION_DURABLE_KEY	numeric
XS.PERSON_DIM_V	MD_DURABLE_KEY	numeric
XS.PERSON_DIM_V	Name	nvarchar
XS.PERSON_DIM_V	PARENT_DURABLE_KEY	numeric
XS.PRJOBJECTIVE_DIM_V	MD_DURABLE_KEY	numeric
XS.PRJOBJECTIVE_DIM_V	Name	nvarchar
XS.PRJOBJECTIVE_DIM_V	Priority	numeric
XS.PRJOBJECTIVE_DIM_V	State	nvarchar
XS.PROJECT_FACT_V	ACTIVE_INDICATOR	numeric
XS.PROJECT_FACT_V	Approval_Date	datetime
XS.PROJECT_FACT_V	DESCRIPTION	nvarchar
XS.PROJECT_FACT_V	End_Date	datetime
XS.PROJECT_FACT_V	FLAG_ACTIVE	nvarchar
XS.PROJECT_FACT_V	FLAG_COMPLETED	nvarchar
XS.PROJECT_FACT_V	GREEN_HEALTH_INDICATOR	numeric
XS.PROJECT_FACT_V	HAS_OBJECTIVE_INDICATOR	numeric
XS.PROJECT_FACT_V	HEALTH_INDICATOR	nvarchar
XS.PROJECT_FACT_V	IN_CONTROL_INDICATOR	numeric
XS.PROJECT_FACT_V	Initiation_Date	datetime
XS.PROJECT_FACT_V	Level0	nvarchar
XS.PROJECT_FACT_V	Level1	nvarchar
XS.PROJECT_FACT_V	Level2	nvarchar
XS.PROJECT_FACT_V	Level3	nvarchar
XS.PROJECT_FACT_V	Level4	nvarchar
XS.PROJECT_FACT_V	Level5	nvarchar
XS.PROJECT_FACT_V	Level6	nvarchar
XS.PROJECT_FACT_V	Level7	nvarchar

Table Name	Name	Type
XS.PROJECT_FACT_V	Level8	nvarchar
XS.PROJECT_FACT_V	Level9	nvarchar
XS.PROJECT_FACT_V	LOCATION_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	MD_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	Name	nvarchar
XS.PROJECT_FACT_V	Name_Alt	nvarchar
XS.PROJECT_FACT_V	ON_TIME_INDICATOR	numeric
XS.PROJECT_FACT_V	ORG_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	PARENT_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	Planned_End_Date	datetime
XS.PROJECT_FACT_V	Planned_Start_Date	datetime
XS.PROJECT_FACT_V	Project_Class	nvarchar
XS.PROJECT_FACT_V	PROJECT_GROUP	nvarchar
XS.PROJECT_FACT_V	PROJECT_MGR_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	PROJECT_OBJECTIVE_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	RED_HEALTH_INDICATOR	numeric
XS.PROJECT_FACT_V	RISK_RATING	numeric
XS.PROJECT_FACT_V	Rollout_Date	datetime
XS.PROJECT_FACT_V	SERVICE_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	Start_Date	datetime
XS.PROJECT_FACT_V	STATUS	nvarchar
XS.PROJECT_FACT_V	TOT_ACTUAL_EFFORT	float
XS.PROJECT_FACT_V	TOT_PLANNED_EFFORT	float
XS.PROJECT_FACT_V	TOT_REMAINING_EFFORT	float
XS.PROJECT_FACT_V	Work_Plan_Created_Date	datetime
XS.PROJECT_FACT_V	YELLOW_HEALTH_INDICATOR	numeric
XS.PROJECTISSUE_FACT_V	Close_Date	datetime

Table Name	Name	Type
XS.PROJECTISSUE_FACT_V	Creation_Date	datetime
XS.PROJECTISSUE_FACT_V	Due_Date	datetime
XS.PROJECTISSUE_FACT_V	Identified_Date	datetime
XS.PROJECTISSUE_FACT_V	ISSUE_OWNER_DURABLE_KEY	numeric
XS.PROJECTISSUE_FACT_V	LOCATION_DURABLE_KEY	numeric
XS.PROJECTISSUE_FACT_V	MD_DURABLE_KEY	numeric
XS.PROJECTISSUE_FACT_V	Name	nvarchar
XS.PROJECTISSUE_FACT_V	ORG_DURABLE_KEY	numeric
XS.PROJECTISSUE_FACT_V	Priority	nvarchar
XS.PROJECTISSUE_FACT_V	PROJECT_DURABLE_KEY	numeric
XS.PROJECTISSUE_FACT_V	Resolution	nvarchar
XS.PROJECTISSUE_FACT_V	Status	nvarchar
XS.PROJECTISSUE_FACT_V	Type	nvarchar
XS.PROJECTRISK_FACT_V	ACTIVE_PROCESS	nvarchar
XS.PROJECTRISK_FACT_V	Approved_Date	datetime
XS.PROJECTRISK_FACT_V	Close_Time	datetime
XS.PROJECTRISK_FACT_V	Create_Time	datetime
XS.PROJECTRISK_FACT_V	MD_DURABLE_KEY	numeric
XS.PROJECTRISK_FACT_V	PRIORITY	nvarchar
XS.PROJECTRISK_FACT_V	PROJECT_DURABLE_KEY	numeric
XS.PROJECTRISK_FACT_V	REFERENCE_NUMBER	nvarchar
XS.PROJECTRISK_FACT_V	Start_Date	datetime
XS.PROJECTRISK_FACT_V	Status	nvarchar
XS.PROJECTRISK_FACT_V	Target_Date	datetime
XS.PROJECTRISK_FACT_V	THRESHOLDMET	nvarchar
XS.PROJECTRISK_FACT_V	Type	nvarchar
XS.PROJECTTASK_FACT_V	ACTUAL_HOURS	float

Table Name	Name	Type
XS.PROJECTTASK_FACT_V	End_Date	datetime
XS.PROJECTTASK_FACT_V	ESTIMATED_REMAINING_HOURS	float
XS.PROJECTTASK_FACT_V	EXTERNAL_RESOURCE	nvarchar
XS.PROJECTTASK_FACT_V	LOCATION_DURABLE_KEY	numeric
XS.PROJECTTASK_FACT_V	MD_DURABLE_KEY	numeric
XS.PROJECTTASK_FACT_V	Name	nvarchar
XS.PROJECTTASK_FACT_V	ORG_DURABLE_KEY	numeric
XS.PROJECTTASK_FACT_V	OVERDUE_TASK_INDICATOR	numeric
XS.PROJECTTASK_FACT_V	PERSON_DURABLE_KEY	numeric
XS.PROJECTTASK_FACT_V	PLANNED_DURATION	float
XS.PROJECTTASK_FACT_V	Planned_End_Date	datetime
XS.PROJECTTASK_FACT_V	PLANNED_HOURS	float
XS.PROJECTTASK_FACT_V	Planned_Start_Date	datetime
XS.PROJECTTASK_FACT_V	PROJECT_DURABLE_KEY	numeric
XS.PROJECTTASK_FACT_V	SERVICE_DURABLE_KEY	numeric
XS.PROJECTTASK_FACT_V	Start_Date	datetime
XS.SERVICE_DIM_V	BusinessCriticality	numeric
XS.SERVICE_DIM_V	Description	nvarchar
XS.SERVICE_DIM_V	DisplayLabel	nvarchar
XS.SERVICE_DIM_V	Level0	nvarchar
XS.SERVICE_DIM_V	Level1	nvarchar
XS.SERVICE_DIM_V	Level2	nvarchar
XS.SERVICE_DIM_V	Level3	nvarchar
XS.SERVICE_DIM_V	Level4	nvarchar
XS.SERVICE_DIM_V	Level5	nvarchar
XS.SERVICE_DIM_V	Level6	nvarchar
XS.SERVICE_DIM_V	Level7	nvarchar

Table Name	Name	Type
XS.SERVICE_DIM_V	Level8	nvarchar
XS.SERVICE_DIM_V	Level9	nvarchar
XS.SERVICE_DIM_V	MANAGER_DURABLE_KEY	numeric
XS.SERVICE_DIM_V	MD_DURABLE_KEY	numeric
XS.SERVICE_DIM_V	Name	nvarchar
XS.SERVICE_DIM_V	State	nvarchar
XS.SERVICE_DIM_V	Type	nvarchar

Object List

The table lists all the entities and fields of the model that were selected to be part of the Context.

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
IssueOwner	EndDate	XS.PERSON_DIM_V	IssueOwner	DATE_END_LOC	DATE
IssueOwner	Level0	XS.PERSON_DIM_V	IssueOwner	LEVEL0	STRING
IssueOwner	Level1	XS.PERSON_DIM_V	IssueOwner	LEVEL1	STRING
IssueOwner	Level2	XS.PERSON_DIM_V	IssueOwner	LEVEL2	STRING
IssueOwner	Level3	XS.PERSON_DIM_V	IssueOwner	LEVEL3	STRING
IssueOwner	Level4	XS.PERSON_DIM_V	IssueOwner	LEVEL4	STRING
IssueOwner	Level5	XS.PERSON_DIM_V	IssueOwner	LEVEL5	STRING
IssueOwner	Level6	XS.PERSON_DIM_V	IssueOwner	LEVEL6	STRING
IssueOwner	Level7	XS.PERSON_DIM_V	IssueOwner	LEVEL7	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
IssueOwner	Level8	XS.PERSON_DIM_V	IssueOwner	LEVEL8	STRING
IssueOwner	Level9	XS.PERSON_DIM_V	IssueOwner	LEVEL9	STRING
IssueOwner	Name	XS.PERSON_DIM_V	IssueOwner	Name	STRING
IssueOwner	StratDate	XS.PERSON_DIM_V	IssueOwner	DATE_START_LOC	DATE
Person	EndDate	XS.PERSON_DIM_V		DATE_END_LOC	DATE
Person	Level0	XS.PERSON_DIM_V		LEVEL0	STRING
Person	Level1	XS.PERSON_DIM_V		LEVEL1	STRING
Person	Level2	XS.PERSON_DIM_V		LEVEL2	STRING
Person	Level3	XS.PERSON_DIM_V		LEVEL3	STRING
Person	Level4	XS.PERSON_DIM_V		LEVEL4	STRING
Person	Level5	XS.PERSON_DIM_V		LEVEL5	STRING
Person	Level6	XS.PERSON_DIM_V		LEVEL6	STRING
Person	Level7	XS.PERSON_DIM_V		LEVEL7	STRING
Person	Level8	XS.PERSON_DIM_V		LEVEL8	STRING
Person	Level9	XS.PERSON_DIM_V		LEVEL9	STRING
Person	Name	XS.PERSON_DIM_V		Name	STRING
Person	StratDate	XS.PERSON_DIM_V		DATE_START_LOC	DATE

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
Project	ActiveIndicator	XS.PROJECT_FACT_V		ACTIVE_INDICATOR	NUMERIC
Project	ApprovalDate	XS.PROJECT_FACT_V		Approval_Date	DATE
Project	Class	XS.PROJECT_FACT_V		Project_Class	STRING
Project	Description	XS.PROJECT_FACT_V		DESCRIPTION	STRING
Project	EndDate	XS.PROJECT_FACT_V		End_Date	DATE
Project	FlagActive	XS.PROJECT_FACT_V		FLAG_ACTIVE	STRING
Project	FlagCompleted	XS.PROJECT_FACT_V		FLAG_COMPLETED	STRING
Project	HasObjectiveIndicator	XS.PROJECT_FACT_V		HAS_OBJECTIVE_INDICATOR	NUMERIC
Project	HealthIndicator	XS.PROJECT_FACT_V		HEALTH_INDICATOR	STRING
Project	InControlIndicator	XS.PROJECT_FACT_V		IN_CONTROL_INDICATOR	NUMERIC
Project	InitiationDate	XS.PROJECT_FACT_V		Initiation_Date	DATE
Project	Level0	XS.PROJECT_FACT_V		Level0	STRING
Project	Level1	XS.PROJECT_FACT_V		Level1	STRING
Project	Level2	XS.PROJECT_FACT_V		Level2	STRING
Project	Level3	XS.PROJECT_FACT_V		Level3	STRING
Project	Level4	XS.PROJECT_FACT_V		Level4	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
Project	Level5	XS.PROJECT_FACT_V		Level5	STRING
Project	Level6	XS.PROJECT_FACT_V		Level6	STRING
Project	Level7	XS.PROJECT_FACT_V		Level7	STRING
Project	Level8	XS.PROJECT_FACT_V		Level8	STRING
Project	Level9	XS.PROJECT_FACT_V		Level9	STRING
Project	Name	XS.PROJECT_FACT_V		Name	STRING
Project	OnTimeIndicator	XS.PROJECT_FACT_V		ON_TIME_INDICATOR	NUMERIC
Project	PlannedEndDate	XS.PROJECT_FACT_V		Planned_End_Date	DATE
Project	PlannedStartDate	XS.PROJECT_FACT_V		Planned_Start_Date	DATE
Project	ProjectGroup	XS.PROJECT_FACT_V		PROJECT_GROUP	STRING
Project	RiskRating	XS.PROJECT_FACT_V		RISK_RATING	NUMERIC
Project	RolloutDate	XS.PROJECT_FACT_V		Rollout_Date	DATE
Project	StartDate	XS.PROJECT_FACT_V		Start_Date	DATE
Project	Status	XS.PROJECT_FACT_V		STATUS	STRING
Project	WorkPlanCreatedDate	XS.PROJECT_FACT_V		Work_Plan_Created_Date	DATE
ProjectIssue	CloseDate	XS.PROJECTISSUE_FACT_V		Close_Date	DATE
ProjectIssue	CreationDate	XS.PROJECTISSUE_FACT_V		Creation_Date	DATE

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
ProjectIssue	DueDate	XS.PROJECTISSUE_FACT_V		Due_Date	DATE
ProjectIssue	IdentifiedDate	XS.PROJECTISSUE_FACT_V		Identified_Date	DATE
ProjectIssue	Name	XS.PROJECTISSUE_FACT_V		Name	STRING
ProjectIssue	Priority	XS.PROJECTISSUE_FACT_V		Priority	STRING
ProjectIssue	Resolution	XS.PROJECTISSUE_FACT_V		Resolution	STRING
ProjectIssue	Status	XS.PROJECTISSUE_FACT_V		Status	STRING
ProjectIssue	Type	XS.PROJECTISSUE_FACT_V		Type	STRING
ProjectLocation	CountryOrArea	XS.LOCATION_DIM_V		Country_Or_Area	STRING
ProjectLocation	Locality	XS.LOCATION_DIM_V		Locality	STRING
ProjectLocation	LocationType	XS.LOCATION_DIM_V		Type	STRING
ProjectLocation	Name	XS.LOCATION_DIM_V		Name	STRING
ProjectLocation	PostalCode	XS.LOCATION_DIM_V		POSTAL_CODE	STRING
ProjectLocation	Region	XS.LOCATION_DIM_V		Region	STRING
ProjectManager	EndDate	XS.PERSON_DIM_V	ProjectManager	DATE_END_LOC	DATE
ProjectManager	Level0	XS.PERSON_DIM_V	ProjectManager	LEVEL0	STRING
ProjectManager	Level1	XS.PERSON_DIM_V	ProjectManager	LEVEL1	STRING
ProjectManager	Level2	XS.PERSON_DIM_V	ProjectManager	LEVEL2	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
ProjectManager	Level3	XS.PERSON_DIM_V	ProjectManager	LEVEL3	STRING
ProjectManager	Level4	XS.PERSON_DIM_V	ProjectManager	LEVEL4	STRING
ProjectManager	Level5	XS.PERSON_DIM_V	ProjectManager	LEVEL5	STRING
ProjectManager	Level6	XS.PERSON_DIM_V	ProjectManager	LEVEL6	STRING
ProjectManager	Level7	XS.PERSON_DIM_V	ProjectManager	LEVEL7	STRING
ProjectManager	Level8	XS.PERSON_DIM_V	ProjectManager	LEVEL8	STRING
ProjectManager	Level9	XS.PERSON_DIM_V	ProjectManager	LEVEL9	STRING
ProjectManager	Name	XS.PERSON_DIM_V	ProjectManager	Name	STRING
ProjectManager	StratDate	XS.PERSON_DIM_V	ProjectManager	DATE_START_LOC	DATE
ProjectObjective	Name	XS.PRJOBJECTIVE_DIM_V		Name	STRING
ProjectObjective	Priority	XS.PRJOBJECTIVE_DIM_V		Priority	NUMERIC
ProjectObjective	State	XS.PRJOBJECTIVE_DIM_V		State	STRING
ProjectOrganization	Level0	XS.ORGANIZATION_DIM_V		LEVEL0	STRING
ProjectOrganization	Level1	XS.ORGANIZATION_DIM_V		LEVEL1	STRING
ProjectOrganization	Level2	XS.ORGANIZATION_DIM_V		LEVEL2	STRING
ProjectOrganization	Level3	XS.ORGANIZATION_DIM_V		LEVEL3	STRING
ProjectOrganization	Level4	XS.ORGANIZATION_DIM_V		LEVEL4	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
ProjectOrganization	Level5	XS.ORGANIZATION_DIM_V		LEVEL5	STRING
ProjectOrganization	Level6	XS.ORGANIZATION_DIM_V		LEVEL6	STRING
ProjectOrganization	Level7	XS.ORGANIZATION_DIM_V		LEVEL7	STRING
ProjectOrganization	Level8	XS.ORGANIZATION_DIM_V		LEVEL8	STRING
ProjectOrganization	Level9	XS.ORGANIZATION_DIM_V		LEVEL9	STRING
ProjectOrganization	Name	XS.ORGANIZATION_DIM_V		Name	STRING
ProjectRisk	ActiveProcess	XS.PROJECTRISK_FACT_V		ACTIVE_PROCESS	STRING
ProjectRisk	ApprovedDate	XS.PROJECTRISK_FACT_V		Approved_Date	DATE
ProjectRisk	CloseTime	XS.PROJECTRISK_FACT_V		Close_Time	DATE
ProjectRisk	CreateTime	XS.PROJECTRISK_FACT_V		Create_Time	DATE
ProjectRisk	Priority	XS.PROJECTRISK_FACT_V		PRIORITY	STRING
ProjectRisk	ReferenceNumber	XS.PROJECTRISK_FACT_V		REFERENCE_NUMBER	STRING
ProjectRisk	StartDate	XS.PROJECTRISK_FACT_V		Start_Date	DATE
ProjectRisk	Status	XS.PROJECTRISK_FACT_V		Status	STRING
ProjectRisk	TargetDate	XS.PROJECTRISK_FACT_V		Target_Date	DATE
ProjectRisk	ThresholdMet	XS.PROJECTRISK_FACT_V		THRESHOLDMET	STRING
ProjectRisk	Type	XS.PROJECTRISK_FACT_V		Type	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
ProjectTask	ActualHours	XS.PROJECTTASK_FACT_V		ACTUAL_HOURS	NUMERIC
ProjectTask	EndDate	XS.PROJECTTASK_FACT_V		End_Date	DATE
ProjectTask	EstimatedRemainingHours	XS.PROJECTTASK_FACT_V		ESTIMATED_REMAINING_HOURS	NUMERIC
ProjectTask	ExternalResource	XS.PROJECTTASK_FACT_V		EXTERNAL_RESOURCE	STRING
ProjectTask	Name	XS.PROJECTTASK_FACT_V		Name	STRING
ProjectTask	OverdueTaskIndicator	XS.PROJECTTASK_FACT_V		OVERDUE_TASK_INDICATOR	NUMERIC
ProjectTask	PlannedDuration	XS.PROJECTTASK_FACT_V		PLANNED_DURATION	NUMERIC
ProjectTask	PlannedEndDate	XS.PROJECTTASK_FACT_V		Planned_End_Date	DATE
ProjectTask	PlannedHours	XS.PROJECTTASK_FACT_V		PLANNED_HOURS	NUMERIC
ProjectTask	PlannedStartDate	XS.PROJECTTASK_FACT_V		Planned_Start_Date	DATE
ProjectTask	StartDate	XS.PROJECTTASK_FACT_V		Start_Date	DATE
Service	BusinessCriticality	XS.SERVICE_DIM_V		BusinessCriticality	NUMERIC
Service	Description	XS.SERVICE_DIM_V		Description	STRING
Service	DisplayLabel	XS.SERVICE_DIM_V		DisplayLabel	STRING
Service	Level0	XS.SERVICE_DIM_V		Level0	STRING
Service	Level1	XS.SERVICE_		Level1	STRIN

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
		DIM_V			G
Service	Level2	XS.SERVICE_DIM_V		Level2	STRING
Service	Level3	XS.SERVICE_DIM_V		Level3	STRING
Service	Level4	XS.SERVICE_DIM_V		Level4	STRING
Service	Level5	XS.SERVICE_DIM_V		Level5	STRING
Service	Level6	XS.SERVICE_DIM_V		Level6	STRING
Service	Level7	XS.SERVICE_DIM_V		Level7	STRING
Service	Level8	XS.SERVICE_DIM_V		Level8	STRING
Service	Level9	XS.SERVICE_DIM_V		Level9	STRING
Service	Name	XS.SERVICE_DIM_V		Name	STRING
Service	State	XS.SERVICE_DIM_V		State	STRING
Service	Type	XS.SERVICE_DIM_V		Type	STRING
TaskLocation	CountryOrArea	XS.LOCATION_DIM_V	TaskLocation	Country_Or_Area	STRING
TaskLocation	Locality	XS.LOCATION_DIM_V	TaskLocation	Locality	STRING
TaskLocation	LocationType	XS.LOCATION_DIM_V	TaskLocation	Type	STRING
TaskLocation	Name	XS.LOCATION_DIM_V	TaskLocation	Name	STRING
TaskLocation	PostalCode	XS.LOCATION_DIM_V	TaskLocation	POSTAL_CODE	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
TaskLocation	Region	XS.LOCATION_DIM_V	TaskLocation	Region	STRING
TaskOrganization	Level0	XS.ORGANIZATION_DIM_V	TaskOrganization	LEVEL0	STRING
TaskOrganization	Level1	XS.ORGANIZATION_DIM_V	TaskOrganization	LEVEL1	STRING
TaskOrganization	Level2	XS.ORGANIZATION_DIM_V	TaskOrganization	LEVEL2	STRING
TaskOrganization	Level3	XS.ORGANIZATION_DIM_V	TaskOrganization	LEVEL3	STRING
TaskOrganization	Level4	XS.ORGANIZATION_DIM_V	TaskOrganization	LEVEL4	STRING
TaskOrganization	Level5	XS.ORGANIZATION_DIM_V	TaskOrganization	LEVEL5	STRING
TaskOrganization	Level6	XS.ORGANIZATION_DIM_V	TaskOrganization	LEVEL6	STRING
TaskOrganization	Level7	XS.ORGANIZATION_DIM_V	TaskOrganization	LEVEL7	STRING
TaskOrganization	Level8	XS.ORGANIZATION_DIM_V	TaskOrganization	LEVEL8	STRING
TaskOrganization	Level9	XS.ORGANIZATION_DIM_V	TaskOrganization	LEVEL9	STRING
TaskOrganization	Name	XS.ORGANIZATION_DIM_V	TaskOrganization	Name	STRING

FinancialManagement Context

IT Financial Management ensures that the IT infrastructure is obtained at the most effective price (which does not necessarily mean the cheapest) and calculates the cost of providing IT services so that an organization can understand the costs of its IT services. These costs may then be recovered from the customer of the service.

HP Project and Portfolio Management is the data source used by this Context (universe).

The following universe contains the attributes and classes that relate to Financial Management.

To access:

In Executive Scorecard, click **Admin > Semantic Layer > Semantic Layer**. In the Context Management page, click **Launch Context Designer**. In the Context Designer page, click **Open an existing context**, and select the Context.



Learn More

Integration with HP Project and Portfolio Management

The integration with HP Project and Portfolio Management provides KPIs based on the Financial Management context. You can use these KPIs in Dashboard page components to help you manage the finances of your company. For details on these KPIs, see PPM Data Source - Integration, Associated Contexts, KPIs, Metrics, and Data Lineage in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Project and Portfolio Management*.

In addition, the integration provides Allocations and Costs that are based on the Financial Management context.

For details, see Allocation Management in the *IT Executive Scorecard Financial Analyst Guide*.

For details, see Cost Explorer in the *IT Executive Scorecard Financial Analyst Guide*.

You can use the default dimensions provided in the Finance tab to create your allocations and costs. You can also add your dimensions to the FinancialManagement context and base your allocations and costs on these dimensions. You can also rename the existing dimensions to better reflect your financial environment. For details, see FinancialManagement Context in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Project and Portfolio Management*.

Tasks

Display the Context

1. In Executive Scorecard, click **Admin > Semantic Layer > Semantic Layer**. The Context Management page opens.

2. The list of out-of-the-box Contexts is displayed.
3. Click **Launch Context Designer**.
4. In the Context Designer page that opens, click **Open an existing context**.
5. Select the relevant Context.

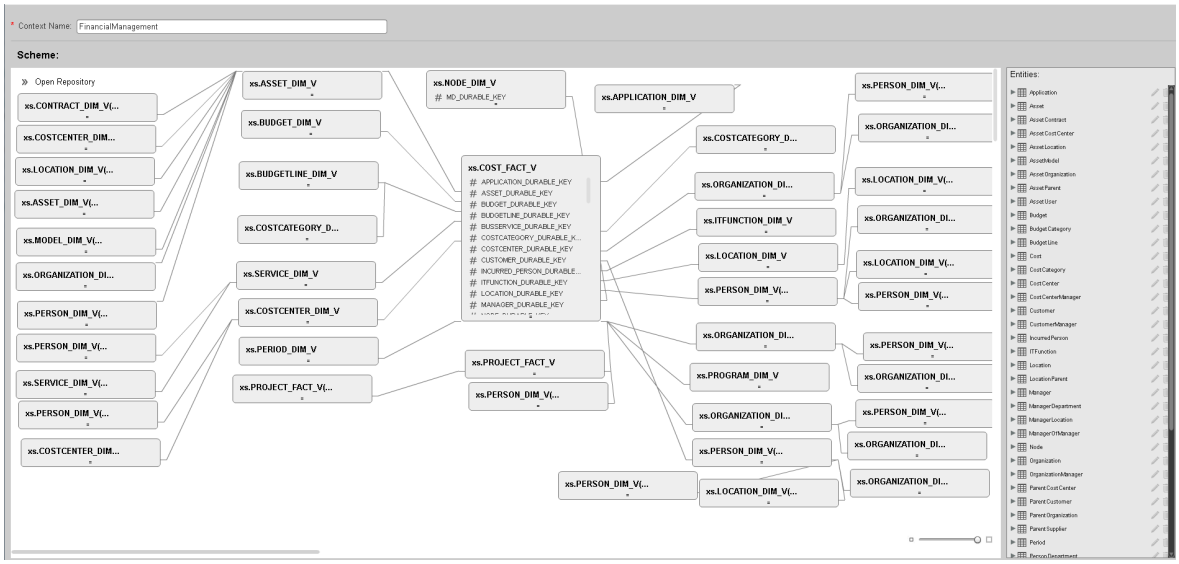
   The structure of the Context is displayed.

For additional details about Context Designer, see Semantic Layer - Context Designer in the *IT Executive Scorecard Administrator Guide*.

Reference

Context Tables and Structure

The context includes the following tables and relationships:



Statistics

Entity Count	Field Count	Table Count	Alias Count	Join Count
18	125	18	2	17

Model Structure

The table lists all the views and fields included in the model even when the corresponding objects have not been selected to be part of the corresponding Context.

Table Name	Name	Type
XS.APPLICATION_DIM_V	MD_DURABLE_KEY	numeric

Table Name	Name	Type
XS.APPLICATION_DIM_V	Name	nvarchar
XS.ASSET_FACT_V	COSTCENTER_DURABLE_KEY	numeric
XS.ASSET_FACT_V	INSTALLED_PERIOD_DURABLE_KEY	numeric
XS.ASSET_FACT_V	LOCATION_DURABLE_KEY	numeric
XS.ASSET_FACT_V	MAINT_CONTRACT_DURABLE_KEY	numeric
XS.ASSET_FACT_V	MD_DURABLE_KEY	numeric
XS.ASSET_FACT_V	MODEL_DURABLE_KEY	numeric
XS.ASSET_FACT_V	Name	nvarchar
XS.ASSET_FACT_V	ORG_DURABLE_KEY	numeric
XS.ASSET_FACT_V	PARENT_DURABLE_KEY	numeric
XS.ASSET_FACT_V	PURCH_DELV_PERIOD_DURABLE_KEY	numeric
XS.ASSET_FACT_V	PURCH_ORD_PERIOD_DURABLE_KEY	numeric
XS.ASSET_FACT_V	PURCH_REQ_PERIOD_DURABLE_KEY	numeric
XS.ASSET_FACT_V	RETIRED_PERIOD_DURABLE_KEY	numeric
XS.ASSET_FACT_V	SERVICE_DURABLE_KEY	numeric
XS.ASSET_FACT_V	STATUS	nvarchar
XS.ASSET_FACT_V	Type	nvarchar
XS.ASSET_FACT_V	USER_DURABLE_KEY	numeric
XS.BUDGET_DIM_V	MD_DURABLE_KEY	numeric
XS.BUDGET_DIM_V	Name	nvarchar
XS.BUDGETLINE_DIM_V	BUDGETCATEGORY_DURABLE_KEY	numeric
XS.BUDGETLINE_DIM_V	BUDGET_DURABLE_KEY	numeric
XS.BUDGETLINE_DIM_V	ExpenseType	varchar
XS.BUDGETLINE_DIM_V	MD_DURABLE_KEY	numeric
XS.BUDGETLINE_DIM_V	Name	nvarchar
XS.COSTCATEGORY_DIM_V	CostCategoryCode	nvarchar
XS.COSTCATEGORY_DIM_V	MD_DURABLE_KEY	numeric

Table Name	Name	Type
XS.COSTCATEGORY_DIM_V	Name	nvarchar
XS.COSTCENTER_DIM_V	End_Date	datetime
XS.COSTCENTER_DIM_V	GL_CODE	nvarchar
XS.COSTCENTER_DIM_V	MANAGER_DURABLE_KEY	numeric
XS.COSTCENTER_DIM_V	MD_DURABLE_KEY	numeric
XS.COSTCENTER_DIM_V	Name	nvarchar
XS.COSTCENTER_DIM_V	PARENT_DURABLE_KEY	numeric
XS.COSTCENTER_DIM_V	Start_Date	datetime
XS.COST_FACT_V	Amount	float
XS.COST_FACT_V	APPLICATION_DURABLE_KEY	numeric
XS.COST_FACT_V	BUDGET_DURABLE_KEY	numeric
XS.COST_FACT_V	BUDGETLINE_DURABLE_KEY	numeric
XS.COST_FACT_V	BUSSERVICE_DURABLE_KEY	numeric
XS.COST_FACT_V	ASSET_DURABLE_KEY	numeric
XS.COST_FACT_V	CONTRACT_DURABLE_KEY	numeric
XS.COST_FACT_V	COSTCATEGORY_DURABLE_KEY	numeric
XS.COST_FACT_V	COSTCENTER_DURABLE_KEY	numeric
XS.COST_FACT_V	CostType	varchar
XS.COST_FACT_V	CUSTOMER_DURABLE_KEY	numeric
XS.COST_FACT_V	EXCHANGE_BASE_DURABLE_KEY	numeric
XS.COST_FACT_V	EXCHANGE_LOC_DURABLE_KEY	numeric
XS.COST_FACT_V	ExpenseType	varchar
XS.COST_FACT_V	INCURRED_PERSON_DURABLE_KEY	numeric
XS.COST_FACT_V	IsDiscretionary	varchar
XS.COST_FACT_V	ITFUNCTION_DURABLE_KEY	numeric
XS.COST_FACT_V	LOCATION_DURABLE_KEY	numeric
XS.COST_FACT_V	MANAGER_DURABLE_KEY	numeric

Table Name	Name	Type
XS.COST_FACT_V	ORG_DURABLE_KEY	numeric
XS.COST_FACT_V	PERIOD_DURABLE_KEY	numeric
XS.COST_FACT_V	PROGRAM_DURABLE_KEY	numeric
XS.COST_FACT_V	PROJECT_DURABLE_KEY	numeric
XS.COST_FACT_V	SUPPLIER_DURABLE_KEY	numeric
XS.ITFUNCTION_DIM_V	MD_DURABLE_KEY	numeric
XS.ITFUNCTION_DIM_V	Name	nvarchar
XS.LOCATION_DIM_V	Country_Or_Area	nvarchar
XS.LOCATION_DIM_V	Locality	nvarchar
XS.LOCATION_DIM_V	MD_DURABLE_KEY	numeric
XS.LOCATION_DIM_V	Name	nvarchar
XS.LOCATION_DIM_V	PARENT_DURABLE_KEY	numeric
XS.LOCATION_DIM_V	POSTAL_CODE	nvarchar
XS.LOCATION_DIM_V	Region	nvarchar
XS.LOCATION_DIM_V	Type	nvarchar
XS.MODEL_DIM_V	MD_DURABLE_KEY	numeric
XS.MODEL_DIM_V	MEMORY	numeric
XS.MODEL_DIM_V	Name	nvarchar
XS.MODEL_DIM_V	NameAlt	nvarchar
XS.MODEL_DIM_V	OS	nvarchar
XS.MODEL_DIM_V	PARENT_DURABLE_KEY	numeric
XS.MODEL_DIM_V	PROCESSOR	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL0	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL1	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL2	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL3	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL4	nvarchar

Table Name	Name	Type
XS.ORGANIZATION_DIM_V	LEVEL5	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL6	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL7	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL8	nvarchar
XS.ORGANIZATION_DIM_V	LEVEL9	nvarchar
XS.ORGANIZATION_DIM_V	MD_DURABLE_KEY	numeric
XS.ORGANIZATION_DIM_V	Name	nvarchar
XS.PERIOD_DIM_V	Day	nvarchar
XS.PERIOD_DIM_V	DESCRIPTION	nvarchar
XS.PERIOD_DIM_V	DISPLAY_LABEL	nvarchar
XS.PERIOD_DIM_V	END_DATE	datetime
XS.PERIOD_DIM_V	FINANCIAL_USAGE	nvarchar
XS.PERIOD_DIM_V	MD_DURABLE_KEY	numeric
XS.PERIOD_DIM_V	Month	nvarchar
XS.PERIOD_DIM_V	NAME	nvarchar
XS.PERIOD_DIM_V	PERIODICITY	nvarchar
XS.PERIOD_DIM_V	PERIOD_NUMBER	numeric
XS.PERIOD_DIM_V	Quarter	nvarchar
XS.PERIOD_DIM_V	START_DATE	datetime
XS.PERIOD_DIM_V	Week	nvarchar
XS.PERIOD_DIM_V	Year	nvarchar
XS.PERIOD_DIM_V	Year_Number	numeric
XS.PERSON_DIM_V	DATE_END_LOC	datetime
XS.PERSON_DIM_V	DATE_START_LOC	datetime
XS.PERSON_DIM_V	DEPT_DURABLE_KEY	numeric
XS.PERSON_DIM_V	LEVEL0	nvarchar
XS.PERSON_DIM_V	LEVEL1	nvarchar

Table Name	Name	Type
XS.PERSON_DIM_V	LEVEL2	nvarchar
XS.PERSON_DIM_V	LEVEL3	nvarchar
XS.PERSON_DIM_V	LEVEL4	nvarchar
XS.PERSON_DIM_V	LEVEL5	nvarchar
XS.PERSON_DIM_V	LEVEL6	nvarchar
XS.PERSON_DIM_V	LEVEL7	nvarchar
XS.PERSON_DIM_V	LEVEL8	nvarchar
XS.PERSON_DIM_V	LEVEL9	nvarchar
XS.PERSON_DIM_V	LOCATION_DURABLE_KEY	numeric
XS.PERSON_DIM_V	MD_DURABLE_KEY	numeric
XS.PERSON_DIM_V	Name	nvarchar
XS.PERSON_DIM_V	PARENT_DURABLE_KEY	numeric
XS.PROGRAM_DIM_V	MD_DURABLE_KEY	numeric
XS.PROGRAM_DIM_V	Name	nvarchar
XS.PROJECT_FACT_V	ACTIVE_INDICATOR	numeric
XS.PROJECT_FACT_V	Approval_Date	datetime
XS.PROJECT_FACT_V	DESCRIPTION	nvarchar
XS.PROJECT_FACT_V	End_Date	datetime
XS.PROJECT_FACT_V	FLAG_ACTIVE	nvarchar
XS.PROJECT_FACT_V	FLAG_COMPLETED	nvarchar
XS.PROJECT_FACT_V	GREEN_HEALTH_INDICATOR	numeric
XS.PROJECT_FACT_V	HAS_OBJECTIVE_INDICATOR	numeric
XS.PROJECT_FACT_V	HEALTH_INDICATOR	nvarchar
XS.PROJECT_FACT_V	IN_CONTROL_INDICATOR	numeric
XS.PROJECT_FACT_V	Initiation_Date	datetime
XS.PROJECT_FACT_V	Level0	nvarchar
XS.PROJECT_FACT_V	Level1	nvarchar

Table Name	Name	Type
XS.PROJECT_FACT_V	Level2	nvarchar
XS.PROJECT_FACT_V	Level3	nvarchar
XS.PROJECT_FACT_V	Level4	nvarchar
XS.PROJECT_FACT_V	Level5	nvarchar
XS.PROJECT_FACT_V	Level6	nvarchar
XS.PROJECT_FACT_V	Level7	nvarchar
XS.PROJECT_FACT_V	Level8	nvarchar
XS.PROJECT_FACT_V	Level9	nvarchar
XS.PROJECT_FACT_V	LOCATION_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	MD_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	Name	nvarchar
XS.PROJECT_FACT_V	ON_TIME_INDICATOR	numeric
XS.PROJECT_FACT_V	ORG_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	PARENT_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	Planned_End_Date	datetime
XS.PROJECT_FACT_V	Planned_Start_Date	datetime
XS.PROJECT_FACT_V	Project_Class	nvarchar
XS.PROJECT_FACT_V	Project_Group	nvarchar
XS.PROJECT_FACT_V	PROJECT_MGR_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	PROJECT_OBJECTIVE_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	RED_HEALTH_INDICATOR	numeric
XS.PROJECT_FACT_V	RISK_RATING	numeric
XS.PROJECT_FACT_V	Rollout_Date	datetime
XS.PROJECT_FACT_V	SERVICE_DURABLE_KEY	numeric
XS.PROJECT_FACT_V	Start_Date	datetime
XS.PROJECT_FACT_V	STATUS	nvarchar
XS.PROJECT_FACT_V	TOT_PLANNED_EFFORT	float

Table Name	Name	Type
XS.PROJECT_FACT_V	TOT_REMAINING_EFFORT	float
XS.PROJECT_FACT_V	Work_Plan_Created_Date	datetime
XS.PROJECT_FACT_V	YELLOW_HEALTH_INDICATOR	numeric
XS.SERVICE_DIM_V	BusinessCriticality	numeric
XS.SERVICE_DIM_V	Description	nvarchar
XS.SERVICE_DIM_V	DisplayLabel	nvarchar
XS.SERVICE_DIM_V	Level0	nvarchar
XS.SERVICE_DIM_V	Level1	nvarchar
XS.SERVICE_DIM_V	Level2	nvarchar
XS.SERVICE_DIM_V	Level3	nvarchar
XS.SERVICE_DIM_V	Level4	nvarchar
XS.SERVICE_DIM_V	Level5	nvarchar
XS.SERVICE_DIM_V	Level6	nvarchar
XS.SERVICE_DIM_V	Level7	nvarchar
XS.SERVICE_DIM_V	Level8	nvarchar
XS.SERVICE_DIM_V	Level9	nvarchar
XS.SERVICE_DIM_V	MANAGER_DURABLE_KEY	numeric
XS.SERVICE_DIM_V	MD_DURABLE_KEY	numeric
XS.SERVICE_DIM_V	Name	nvarchar
XS.SERVICE_DIM_V	State	nvarchar
XS.SERVICE_DIM_V	Type	nvarchar

Object List

The table lists all the entities and fields of the model that were selected to be part of the Context.

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
Application	Name	XS.APPLICATIO N_DIM_V		Name	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
Asset	Name	XS.ASSET_FACT_V		Name	STRING
Asset	Status	XS.ASSET_FACT_V		STATUS	STRING
Asset	Type	XS.ASSET_FACT_V		Type	STRING
Budget	Name	XS.BUDGET_DIM_V		Name	STRING
BudgetLine	Name	XS.BUDGETLINE_DIM_V		Name	STRING
Cost	Amount	XS.COST_FACT_V		Amount	NUMERIC
Cost	CostType	XS.COST_FACT_V		CostType	STRING
Cost	ExpenseType	XS.COST_FACT_V		ExpenseType	STRING
Cost	IsDiscretionary	XS.COST_FACT_V		IsDiscretionary	STRING
CostCategory	CostCategoryCode	XS.COSTCATEGORY_DIM_V		CostCategoryCode	STRING
CostCategory	Name	XS.COSTCATEGORY_DIM_V		Name	STRING
CostCenter	Name	XS.COSTCENTER_DIM_V		Name	STRING
Customer	Level0	XS.ORGANIZATION_DIM_V	XS_CUSTOMER_DIM	LEVEL0	STRING
Customer	Level1	XS.ORGANIZATION_DIM_V	XS_CUSTOMER_DIM	LEVEL1	STRING
Customer	Level2	XS.ORGANIZATION_DIM_V	XS_CUSTOMER_DIM	LEVEL2	STRING
Customer	Level3	XS.ORGANIZATION_DIM_V	XS_CUSTOMER_DIM	LEVEL3	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
Customer	Level4	XS.ORGANIZATION_DIM_V	XS_CUSTOMER_DIM	LEVEL4	STRING
Customer	Level5	XS.ORGANIZATION_DIM_V	XS_CUSTOMER_DIM	LEVEL5	STRING
Customer	Level6	XS.ORGANIZATION_DIM_V	XS_CUSTOMER_DIM	LEVEL6	STRING
Customer	Level7	XS.ORGANIZATION_DIM_V	XS_CUSTOMER_DIM	LEVEL7	STRING
Customer	Level8	XS.ORGANIZATION_DIM_V	XS_CUSTOMER_DIM	LEVEL8	STRING
Customer	Level9	XS.ORGANIZATION_DIM_V	XS_CUSTOMER_DIM	LEVEL9	STRING
Customer	Name	XS.ORGANIZATION_DIM_V	XS_CUSTOMER_DIM	Name	STRING
ITFunction	Name	XS.ITFUNCTION_DIM_V		Name	STRING
Location	Name	XS.LOCATION_DIM_V		Name	STRING
Manager	Level0	XS.PERSON_DIM_V		LEVEL0	STRING
Manager	Level1	XS.PERSON_DIM_V		LEVEL1	STRING
Manager	Level2	XS.PERSON_DIM_V		LEVEL2	STRING
Manager	Level3	XS.PERSON_DIM_V		LEVEL3	STRING
Manager	Level4	XS.PERSON_DIM_V		LEVEL4	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
Manager	Level5	XS.PERSON_DIM_V		LEVEL5	STRING
Manager	Level6	XS.PERSON_DIM_V		LEVEL6	STRING
Manager	Level7	XS.PERSON_DIM_V		LEVEL7	STRING
Manager	Level8	XS.PERSON_DIM_V		LEVEL8	STRING
Manager	Level9	XS.PERSON_DIM_V		LEVEL9	STRING
Manager	Name	XS.PERSON_DIM_V		Name	STRING
Model	Memory	XS.MODEL_DIM_V		MEMORY	NUMERIC
Model	Name	XS.MODEL_DIM_V		Name	STRING
Model	OS	XS.MODEL_DIM_V		OS	STRING
Model	Processor	XS.MODEL_DIM_V		PROCESSOR	STRING
Organization	Level0	XS.ORGANIZATION_DIM_V		LEVEL0	STRING
Organization	Level1	XS.ORGANIZATION_DIM_V		LEVEL1	STRING
Organization	Level2	XS.ORGANIZATION_DIM_V		LEVEL2	STRING
Organization	Level3	XS.ORGANIZATION_DIM_V		LEVEL3	STRING
Organization	Level4	XS.ORGANIZATION_DIM_V		LEVEL4	STRING
Organization	Level5	XS.ORGANIZATION_DIM_V		LEVEL5	STRING
Organization	Level6	XS.ORGANIZATION_DIM_V		LEVEL6	STRING
Organizatio	Level7	XS.ORGANIZATIO		LEVEL7	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
n		N_DIM_V			
Organizatio n	Level8	XS.ORGANIZATIO N_DIM_V		LEVEL8	STRING
Organizatio n	Level9	XS.ORGANIZATIO N_DIM_V		LEVEL9	STRING
Organizatio n	Name	XS.ORGANIZATIO N_DIM_V		Name	STRING
Period	Day	XS.PERIOD_DIM_ V		Day	STRING
Period	Description	XS.PERIOD_DIM_ V		DESCRIPTION	STRING
Period	DisplayLabel	XS.PERIOD_DIM_ V		DISPLAY_ LABEL	STRING
Period	EndDate	XS.PERIOD_DIM_ V		END_DATE	DATE
Period	FinancialUsage	XS.PERIOD_DIM_ V		FINANCIAL_ USAGE	STRING
Period	Month	XS.PERIOD_DIM_ V		Month	STRING
Period	Name	XS.PERIOD_DIM_ V		NAME	STRING
Period	Periodicity	XS.PERIOD_DIM_ V		PERIODICITY	STRING
Period	PeriodNumber	XS.PERIOD_DIM_ V		PERIOD_ NUMBER	NUMER IC
Period	Quarter	XS.PERIOD_DIM_ V		Quarter	STRING
Period	StartDate	XS.PERIOD_DIM_ V		START_DATE	DATE
Period	Week	XS.PERIOD_DIM_ V		Week	STRING
Period	Year	XS.PERIOD_DIM_ V		Year	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
Period	YearNumber	XS.PERIOD_DIM_V		Year_Number	NUMERIC
Program	Name	XS.PROGRAM_DIM_V		Name	STRING
Project	ActiveIndicator	XS.PROJECT_FACT_V		ACTIVE_INDICATOR	NUMERIC
Project	ApprovalDate	XS.PROJECT_FACT_V		Approval_Date	DATE
Project	Description	XS.PROJECT_FACT_V		DESCRIPTION	STRING
Project	EndDate	XS.PROJECT_FACT_V		End_Date	DATE
Project	FlagActive	XS.PROJECT_FACT_V		FLAG_ACTIVE	STRING
Project	FlagCompleted	XS.PROJECT_FACT_V		FLAG_COMPLETED	STRING
Project	HasObjectiveIndicator	XS.PROJECT_FACT_V		HAS_OBJECTIVE_INDICATOR	NUMERIC
Project	HealthIndicator	XS.PROJECT_FACT_V		HEALTH_INDICATOR	STRING
Project	InControlIndicator	XS.PROJECT_FACT_V		IN_CONTROL_INDICATOR	NUMERIC
Project	InitiationDate	XS.PROJECT_FACT_V		Initiation_Date	DATE
Project	Level0	XS.PROJECT_FACT_V		Level0	STRING
Project	Level1	XS.PROJECT_FACT_V		Level1	STRING
Project	Level2	XS.PROJECT_FACT_V		Level2	STRING
Project	Level3	XS.PROJECT_FACT_V		Level3	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
Project	Level4	XS.PROJECT_FACT_V		Level4	STRING
Project	Level5	XS.PROJECT_FACT_V		Level5	STRING
Project	Level6	XS.PROJECT_FACT_V		Level6	STRING
Project	Level7	XS.PROJECT_FACT_V		Level7	STRING
Project	Level8	XS.PROJECT_FACT_V		Level8	STRING
Project	Level9	XS.PROJECT_FACT_V		Level9	STRING
Project	Name	XS.PROJECT_FACT_V		Name	STRING
Project	OnTimeIndicator	XS.PROJECT_FACT_V		ON_TIME_INDICATOR	NUMERIC
Project	PlannedEndtDate	XS.PROJECT_FACT_V		Planned_End_Date	DATE
Project	PlannedStartDate	XS.PROJECT_FACT_V		Planned_Start_Date	DATE
Project	ProjectClass	XS.PROJECT_FACT_V		Project_Class	STRING
Project	ProjectGroup	XS.PROJECT_FACT_V		Project_Group	STRING
Project	RiskRating	XS.PROJECT_FACT_V		RISK_RATING	NUMERIC
Project	RolloutDate	XS.PROJECT_FACT_V		Rollout_Date	DATE
Project	StartDate	XS.PROJECT_FACT_V		Start_Date	DATE
Project	Status	XS.PROJECT_FACT_V		STATUS	STRING
Project	WorkPlanCreated	XS.PROJECT_		Work_Plan_	DATE

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
	Date	FACT_V		Created_Date	
Service	BusinessCriticality	XS.SERVICE_DIM_V		BusinessCriticality	NUMERIC
Service	Description	XS.SERVICE_DIM_V		Description	STRING
Service	DisplayLabel	XS.SERVICE_DIM_V		DisplayLabel	STRING
Service	Level0	XS.SERVICE_DIM_V		Level0	STRING
Service	Level1	XS.SERVICE_DIM_V		Level1	STRING
Service	Level2	XS.SERVICE_DIM_V		Level2	STRING
Service	Level3	XS.SERVICE_DIM_V		Level3	STRING
Service	Level4	XS.SERVICE_DIM_V		Level4	STRING
Service	Level5	XS.SERVICE_DIM_V		Level5	STRING
Service	Level6	XS.SERVICE_DIM_V		Level6	STRING
Service	Level7	XS.SERVICE_DIM_V		Level7	STRING
Service	Level8	XS.SERVICE_DIM_V		Level8	STRING
Service	Level9	XS.SERVICE_DIM_V		Level9	STRING
Service	Name	XS.SERVICE_DIM_V		Name	STRING
Service	State	XS.SERVICE_DIM_V		State	STRING
Service	Type	XS.SERVICE_DIM_V		Type	STRING

Entity Name	Field Name	Source Table Name	Alias Table Name	DB Column Name	Field Type
Supplier	Level0	XS.ORGANIZATION_DIM_V	XS_SUPPLIER_DIM	LEVEL0	STRING
Supplier	Level1	XS.ORGANIZATION_DIM_V	XS_SUPPLIER_DIM	LEVEL1	STRING
Supplier	Level2	XS.ORGANIZATION_DIM_V	XS_SUPPLIER_DIM	LEVEL2	STRING
Supplier	Level3	XS.ORGANIZATION_DIM_V	XS_SUPPLIER_DIM	LEVEL3	STRING
Supplier	Level4	XS.ORGANIZATION_DIM_V	XS_SUPPLIER_DIM	LEVEL4	STRING
Supplier	Level5	XS.ORGANIZATION_DIM_V	XS_SUPPLIER_DIM	LEVEL5	STRING
Supplier	Level6	XS.ORGANIZATION_DIM_V	XS_SUPPLIER_DIM	LEVEL6	STRING
Supplier	Level7	XS.ORGANIZATION_DIM_V	XS_SUPPLIER_DIM	LEVEL7	STRING
Supplier	Level8	XS.ORGANIZATION_DIM_V	XS_SUPPLIER_DIM	LEVEL8	STRING
Supplier	Level9	XS.ORGANIZATION_DIM_V	XS_SUPPLIER_DIM	LEVEL9	STRING
Supplier	Name	XS.ORGANIZATION_DIM_V	XS_SUPPLIER_DIM	Name	STRING

Web Intelligence Reports Associated with the PPM Data Source

The Web Intelligence reports display information related to the business models provided by the different data sources. The reports can be added to the Web Intelligence Report Viewer component and to the Web Intelligence Static Report Component Viewer component in the Dashboard.

To access:

In the Dashboard, add a Web Intelligence report or an operational report to a Web Intelligence component by configuring the component. For details, see Web Intelligence Report Viewer - Configure Component Dialog Box or Web Intelligence Static Report Component Viewer - Configure Component Dialog Box in the *IT Executive Scorecard Business Analyst Guide*.

The report is then displayed in these components in the Dashboard. For details, see Web Intelligence Report Viewer Component or Web Intelligence Static Report Component Viewer (Display) in the *IT Executive Scorecard Business Analyst Guide*.

Tasks | UI Description

Tasks

This section includes:

- Add a Web Intelligence report or an operational report to a Web Intelligence component 47
- Display a Web Intelligence report or an operational report in a page 47

Add a Web Intelligence report or an operational report to a Web Intelligence component

In the Dashboard, add a Web Intelligence report or an operational report to a Web Intelligence component by configuring the component. For details, see Web Intelligence Report Viewer - Configure Component Dialog Box or Web Intelligence Static Report Component Viewer - Configure Component Dialog Boxin the *IT Executive Scorecard Business Analyst Guide*.

Display a Web Intelligence report or an operational report in a page

After you have added a Web Intelligence report or an operational report to a Web Intelligence component by configuring the component, these reports are then displayed when these components are added to a page in the Dashboard. For details, see Web Intelligence Report Viewer Component or

Web Intelligence Static Report Component Viewer (Display)in the *IT Executive Scorecard Business Analyst Guide*

UI Description

Project Reports

The Project reports are based on the business model taken from the HP Project and Portfolio Management data source.

The reports are:

- Actual Project Efforts for Top 3 Services Report
- Actual vs. Planned Cost for Top 3 Projects Report
- Average Cost of Active Project by Location and Organization in Current Quarter Report
- Percentage of Time Spent on New Projects Report
- Project Cost Allocation by Business Objective Report
- Project Delay by Top 3 Most Costly Projects Report
- Project Health for Active Projects Report

% of Actual vs Planned Projects Cost KPI

Component Type	KPI
Business Questions	Make sure our business agility from the projects perspective is efficient.
Business Objective	Stewardship of IT Investment
Description	The actual costs relative to the planned projects cost.
Context	FinancialManagement
Data source	PPM, AM, AWS, VCM, HPV, IC
Formula	PERCENTAGE_MATH(SUM(Cost.Amount, Cost.CostType ='Actual' And Project.StartDate IN_PERIOD), SUM(Cost.Amount, Cost.CostType ='Planned' And Project.StartDate IN_PERIOD),100)
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Centralize
Thresholds	50 to 75 | 75 to 90 | 90 to 105 | 105 to 120 | 120 to 150
Release	9.00

% of Approved Project Scope Changes KPI

Component Type	KPI
Business Questions	Provides the PMO with information about the approved Scope Changes.
Business Objective	Improve Customer Satisfaction
Description	The number of approved scope changes relative to the total number of scope changes during the measurement period.
Context	DemandManagement
Data source	PPM, ALM, AM
Formula	PERCENTAGE(ScopeChange, ScopeChange.Status='CLOSED_SUCCESS' And Project.Name is not null And ScopeChange.StartDate IN_PERIOD, Project.Name is not null And ScopeChange.StartDate IN_PERIOD,100)
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Maximize
Thresholds	0 to 50 | 50 to 75 | 75 to 100
Release	9.02

% of Change in Assets Cost KPI

Component Type	KPI
Business Questions	Make sure our assets costs are under control. Make sure our asset management is improving.
Business Objective	Reduce Cost
Description	The asset cost in the last period relative to the asset cost in the previous period.
Context	AssetManagement
Data source	AM, PPM, SM
Formula	PERCENTAGE_MATH(SUM(Cost.Amount,Asset.Status='In use' And PERIOD_ ENTITY=InstalledPeriod), SUM(Cost.Amount,Asset.Status='In use' And PERIOD_ ENTITY=InstalledPeriod(-1)),100)-100
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Centralize
Thresholds	-50 to -30 | -30 to -10 | -10 to 10 | 10 to 30 | 30 to 50
Release	9.00

% of Change in Business Service Cost KPI

Component Type	KPI
Business Questions	Make sure that our business services policy is efficient. What is the change of BS cost compared to last month?
Business Objective	Stewardship of IT Investment
Description	The last period cost of business services relative to the cost of business services during the previous period.
Context	FinancialManagement
Data source	PPM, VCM, HPV, IC, AM, AWS
Formula	PERCENTAGE_MATH(SUM(Cost.Amount, Cost.CostType ='Actual' And PERIOD_ENTITY=Period), SUM(Cost.Amount, Cost.CostType ='Actual' And PERIOD_ENTITY=Period(-1)),100)-100
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Centralize
Thresholds	50 to 75 | 75 to 90 | 90 to 105 | 105 to 120 | 120 to 150
Release	9.00

% of Change in Project Cost KPI

Component Type	KPI
Business Questions	Make sure that our project costing policy is efficient.
Business Objective	Stewardship of IT Investment
Description	The change in the cost of projects during the last period relative to the change in the cost of projects during the previous period.
Context	FinancialManagement
Data source	PPM, IC, AM, ALM
Formula	PERCENTAGE_MATH(SUM(Cost.Amount, Project.Name<> 'INVALID' And Project.Name <> 'UNKNOWN' And Cost.CostType ='actual' And PERIOD_ENTITY =Period), SUM(Cost.Amount, Project.Name<> 'INVALID' And Project.Name <> 'UNKNOWN' And Cost.CostType ='actual' And PERIOD_ENTITY =Period(-1)),100)-100
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Centralize
Thresholds	- 50 to -30 | -30 to -10 | 90 to 105 | 10 to 30 | 30 to 50
Release	9.00

% of Healthy Projects KPI

Component Type	KPI
Business Questions	Make sure that the general health of my projects is on track.
Business Objective	Improve Project Execution
Description	The number of healthy projects relative to the total number of projects that are ongoing in the current month.
Context	ProjectPortfolioManagement
Data source	PPM
Formula	PERCENTAGE(Project, Project.HealthIndicator='GREEN' And Project.FlagActive='Y', Project.FlagActive='Y',100)
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Maximize
Thresholds	0 to 80 | 80 to 90 | 90 to 100
Release	9.00

% of IT POR vs Total Revenue KPI

Component Type	KPI
Business Questions	Make sure we are on target for spending against the corporate plan.
Business Objective	Stewardship of IT Investment
Description	The IT Plan Of Record relative to the Total Planned Company Revenue Goal (where the goal is manually entered).
Context	FinancialManagement
Data source	PPM, VCM, AM, IC, HPV, AWS
Formula	PERCENTAGE_MATH(SUM(Cost.Amount,Cost.CostType='Actual' and PERIOD_ ENTITY=Period),100000,20)
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Centralize
Thresholds	0 to 5 | 5 to 15 | 15 to 25 | 25 to 35 | 35 to 100
Release	9.00

% of Capex vs OpEx Spending KPI

Component Type	KPI
Business Questions	How does Capex spending compare to Opex spending? Is the organization within its PoR for capital (Capex) and operating (Opex) expenses? What percentage of spending is capital expenses versus operating expenses? Where is the organization spending the majority of its actual expenses: on capital or on operating expenses?
Business Objective	Alignment with Business Strategy
Description	The capitalized expense relative to the operational expense.
Context	FinancialManagement
Data source	PPM, AM, VCM, IC, HPV, AWS
Formula	PERCENTAGE_MATH(SUM(Cost.Amount, Cost.ExpenseType = 'CAPEX' and PERIOD_ENTITY=Period),SUM(Cost.Amount, Cost.ExpenseType = 'OPEX' and PERIOD_ENTITY=Period),100)
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Centralize
Thresholds	0 to 40 | 40 to 80 | 80 to 120 | 120 to 160 | 160 to 200
Release	9.00

% of Projects Budget at Risk KPI

Component Type	KPI
Business Questions	Make sure our project budget is attributed to healthy projects.
Business Objective	Stewardship of IT Investment
Description	The budget of unhealthy or risky projects relative to the total budget of projects that are ongoing during the measurement period.
Context	FinancialManagement
Data source	PPM
Formula	PERCENTAGE_MATH(SUM(Cost.Amount,Project.RiskRating <> '0' And Project.StartDate IN_PERIOD), SUM(Cost.Amount,Project.StartDate IN_PERIOD))
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 10 | 10 to 20 | 20 to 100
Release	9.00

% of Project Effort Done by External Resources KPI

Component Type	KPI
Business Questions	Make sure the project outsourcing policy is efficient.
Business Objective	Improve Staff Effectiveness
Description	The number of outsourced projects relative to the total number of projects that are ongoing during the measurement period.
Context	ProjectPortfolioManagement
Data source	PPM
Formula	PERCENTAGE_MATH(SUM(ProjectTask.ActualHours, ProjectTask.ExternalResource='Y' And (Project.FlagActive='Y' or ProjectTask.EndDate IN_PERIOD)), SUM(ProjectTask.ActualHours, Project.FlagActive='Y' or ProjectTask.EndDate IN_PERIOD),0)
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Centralize
Thresholds	0 to 5 | 5 to 15 | 15 to 25 | 25 to 35 | 35 to 100
Release	9.00

% of Project Tasks on Time KPI

Component Type	KPI
Business Questions	Make sure our general project management is meeting the expected deliveries.
Business Objective	Improve Project Execution
Description	The number of timely project tasks relative to the total number of active project tasks and project tasks completed during the measurement period.
Context	ProjectPortfolioManagement
Data source	PPM
Formula	PERCENTAGE(ProjectTask, ProjectTask.OverdueTaskIndicator=0 And (ProjectTask.EndDate is NULL or ProjectTask.EndDate IN_PERIOD), ProjectTask.EndDate is NULL or ProjectTask.EndDate IN_PERIOD
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Maximize
Thresholds	0 to 70 | 70 to 85 | 85 to 100
Release	9.00

% of Projects Associated with Business Objectives KPI

Component Type	KPI
Business Questions	Make sure that our investments are focused on the organization's strategical goals.
Business Objective	Alignment with Business Strategy
Description	The number of projects aligned with a business objective relative to the total number of projects that were started during the measurement period.
Context	ProjectPortfolioManagement
Data source	PPM, ALM, AM
Formula	PERCENTAGE(Project, Project.HasObjectiveIndicator=1 And Project.StartDate IN_PERIOD, Project.StartDate IN_PERIOD,100)
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Maximize
Thresholds	0 to 75 | 75 to 90 | 90 to 100
Release	9.00

% of Projects on Time KPI

Component Type	KPI
Business Questions	Make sure our general project management is meeting the expected deliveries.
Business Objective	Improve Project Execution
Description	The number of projects, on track or completed on time, relative to the total number of projects on track or projects that were completed during the measurement period.
Context	ProjectPortfolioManagement
Data source	PPM, ALM
Formula	PERCENTAGE(Project, Project.OnTimeIndicator=1 And (Project.EndDate is NULL or Project.EndDate IN_PERIOD), Project.EndDate is NULL or Project.EndDate IN_PERIOD,100)
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Maximize
Thresholds	0 to 50 | 50 to 75 | 75 to 100
Release	9.00

% of Projects with Unresolved Urgent Issues KPI

Component Type	KPI
Business Questions	Make sure our general project management is meeting the expected deliveries.
Business Objective	Improve Project Execution
Description	The number of projects with unresolved urgent issues, relative to the total number of active projects or projects that were completed during the measurement period.
Context	ProjectPortfolioManagement
Data source	PPM, ALM
Formula	'PERCENTAGE(Project, ProjectIssue.Priority = 'CRITICAL' And (ProjectIssue.Status NOT LIKE 'CLOSED%' And ProjectIssue.Status <> 'CANCELLED') And (Project.FlagActive='Y' or Project.EndDate IN_PERIOD), Project.FlagActive='Y' or Project.EndDate IN_PERIOD)'
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 50 | 50 to 75 | 75 to 100
Release	9.00

% of Time Invested on Strategic Projects KPI

Component Type	KPI
Business Questions	Make sure our business agility from the projects perspective is efficient.
Business Objective	Alignment with Business Strategy
Description	The amount of time invested in strategical projects relative to the total amount of time invested in all projects.
Context	ProjectPortfolioManagement
Data source	PPM, ALM
Formula	PERCENTAGE_MATH(SUM(ProjectTask.ActualHours,Project.HasObjectiveIndicator=1 And (Project.FlagActive='Y' Or Project.EndDate IN_PERIOD)),SUM (ProjectTask.ActualHours,Project.FlagActive='Y' Or Project.EndDate IN_PERIOD),100)
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Maximize
Thresholds	0 to 50 | 50 to 70 | 70 to 100
Release	9.00

% Variance of Actual vs Planned Costs KPI

Component Type	KPI
Business Questions	Make sure the actual costs of an activity stay on track. What is the percentage of actual versus planned spending? How do the actual versus planned costs stay in the defined boundaries?
Business Objective	Stewardship of IT Investment
Description	The actual costs relative to the planned costs of an activity.
Context	FinancialManagement
Data source	PPM, VCM, AM, IC, HPV, AWS
Formula	PERCENTAGE_MATH(SUM(Cost.Amount,Cost.CostType='Actual' and PERIOD_ENTITY=Period), SUM (Cost.Amount,Cost.CostType='Planned' and PERIOD_ENTITY=Period),100)-100
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Centralize
Thresholds	-50 to -30 | 75 to 90 | -10 to 10 | 10 to 30 | 30 to 100
Release	9.00

Average Age of Active Demands KPI

Component Type	KPI
Business Questions	Provides the PMO with information about the average age of active demands that are currently waiting for approval. This also indicate the agility of the organization based on the time that it takes to capture and estimate demand value, and the time to understand whether to approve them or not.
Business Objective	Accelerate Agility
Description	The average age of active demands that are currently waiting for approval.
Context	DemandManagement
Data source	PPM
Formula	DATE_CONVERT('ms', 'd', NOW()-AVG(Demand.StartDate,(Demand.ActiveProcess='Y' AND Demand.Status='IN_PROGRESS' AND Demand.StartDate<=NOW)))
KPI Formula Filter	N/A
Unit Type	Days
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 25 | 25 to 50 | 50 to 100
Release	9.02

Average Age of Active Proposals KPI

Component Type	KPI
Business Questions	Provides the PMO with information about the average age of active proposals that are currently waiting for approval. This also indicate the agility of the organization based on the time that it takes to capture and estimate proposal value, and the time to understand whether to approve them or not
Business Objective	Accelerate Agility
Description	The average age of active proposals that are currently waiting for approval.
Context	DemandManagement
Data source	PPM
Formula	DATE_CONVERT('ms', 'd', NOW()-AVG(Proposal.StartDate,(Proposal.ActiveProcess='Y' AND Proposal.Status='IN_PROGRESS' AND Proposal.StartDate<=NOW)))
KPI Formula Filter	N/A
Unit Type	Days
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 25 | 25 to 50 | 50 to 100
Release	9.02

Average Availability Rating KPI

Component Type	KPI
Business Questions	Perception is reality. A lower rate (3.5 or less) could be an indication of real issues or could be an indication of misaligned expectations.
Business Objective	Application Transformation
Description	Qualitative assessment of availability based on periodic survey results and expert opinion.
Context	ApplicationPortfolioManagement
Data source	PPM
Formula	AVG(APMApplication.Availability, ((APMApplication.StartDate<=NOW AND APMApplication.Status='IN_PROGRESS') or (APMApplication.CloseTime>NOW AND APMApplication.StartDate<=NOW)) And APMApplication.Availability is not Null)
KPI Formula Filter	N/A
Unit Type	Rate
Time Period	Monthly
Direction	Maximize
Thresholds	0 to 3.5 | 3.5 to 4 | 4 to 5
Release	9.30

Average Cost of IT Delivery Per Customer KPI

Component Type	KPI
Business Questions	Make sure our IT delivery costs are on track.
Business Objective	Stewardship of IT Investment
Description	The average cost of IT delivery per customer calculated as the cost of IT service delivery divided by number of end users or customers.
Context	FinancialManagement
Data source	PPM
Formula	SUM(Cost.Amount,Cost.CostType='Actual' and PERIOD_ENTITY=Period)/Count (Customer,Customer.Name <> 'UNKNOWN' And Customer.Name <> 'INVALID')
KPI Formula Filter	N/A
Unit Type	Money
Time Period	Monthly
Direction	Centralize
Thresholds	0 to 1500 | 75 to 90 | 1500 to 3000 | 3000 to 5000 | > 5000
Release	9.00

Average Delivery Time of New Products or Services KPI

Component Type	KPI
Business Questions	Make sure our business agility from the projects perspective is efficient.
Business Objective	Accelerate Agility
Description	The average delivery time of new products/services defined as the time it takes from the conception of a project until it is delivered to customer(EndDate and StartDate used in this KPI formula).
Context	ProjectPortfolioManagement
Data source	PPM, ALM, AM
Formula	DATE_CONVERT('ms','d',(AVG(Project.EndDate, Project.Status='Complete' And Project.EndDate IN_PERIOD)-AVG(Project.StartDate, Project.Status='Complete' And Project.StartDate is not NULL And Project.EndDate IN_PERIOD))/30)
KPI Formula Filter	N/A
Unit Type	Months
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 6 | 6 to 12 | 12 to 18
Release	9.00

Average Maintainability Rating KPI

Component Type	KPI
Business Questions	Perception is reality. A lower rate (3.5 or less) could be an indication of real issues or could be an indication of misaligned expectations.
Business Objective	Application Transformation
Description	The qualitative assessment of maintainability based on periodic survey results and expert opinion.
Context	ApplicationPortfolioManagement
Data source	PPM
Formula	AVG(APMApplication.Maintainability, ((APMApplication.StartDate<=NOW AND APMApplication.Status='IN_PROGRESS') or (APMApplication.CloseTime>NOW AND APMApplication.StartDate<=NOW)) And APMApplication.Maintainability is not Null)
KPI Formula Filter	N/A
Unit Type	Rate
Time Period	Monthly
Direction	Maximize
Thresholds	0 to 3.5 | 3.5 to 4 | 4 to 5
Release	9.30

Average Performance Rating KPI

Component Type	KPI
Business Questions	Perception is reality. A lower rate (3.5 or less) could be an indication of real issues or could be an indication of misaligned expectations.
Business Objective	Application Transformation
Description	Qualitative assessment of performance based on periodic survey results and expert opinion.
Context	ApplicationPortfolioManagement
Data source	PPM
Formula	AVG(APMApplication.Performance, ((APMApplication.StartDate<=NOW AND APMApplication.Status='IN_PROGRESS') or (APMApplication.CloseTime>NOW AND APMApplication.StartDate<=NOW)) And APMApplication.Performance is not Null)
KPI Formula Filter	N/A
Unit Type	Rate
Time Period	Monthly
Direction	Maximize
Thresholds	0 to 3.5 | 3.5 to 4 | 4 to 5
Release	9.30

Average Project Initiation Time KPI

Component Type	KPI
Business Questions	Make sure our project planning policy is efficient.
Business Objective	Accelerate agility
Description	The average time it takes to initiate a project (until all resources are assigned and the planning is completed).
Context	ProjectPortfolioManagement
Data source	PPM, ALM, AM
Formula	DATE_CONVERT('ms','d', AVG(Project.StartDate, Project.StartDate IN_PERIOD)-AVG (Project.PlannedStartDate, Project.PlannedStartDate is not NULL and Project.StartDate IN_PERIOD))
KPI Formula Filter	N/A
Unit Type	Days
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 60 | 60 to 80 | 80 to 180
Release	9.00

Average Time to Evaluate Proposal

Component Type	KPI
Business Questions	Helps determine where cycle time improvements may be made. This KPI shows the duration (open to close) of each proposal category over time. IT managers can see a trend in the length of time to fulfill a request.
Business Objective	Accelerate Agility
Description	The average duration of proposals from the time they are opened to the time they are closed.
Context	DemandManagement
Data source	PPM
Formula	DATE_CONVERT('ms','h', AVG(Proposal.CloseTime, Proposal.CloseTime is not Null and Proposal.StartDate IN_PERIOD) - AVG(Proposal.StartDate, Proposal.CloseTime is not Null and Proposal.StartDate IN_PERIOD))
KPI Formula Filter	N/A
Unit Type	Hours
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 24 | 24 to 48 | 48 to 72
Release	9.02

Average Time to Evaluate Scope Change

Component Type	KPI
Business Questions	Helps determine where cycle time improvements may be made. This KPI shows the duration (open to close) of each proposal category over time. IT managers can see a trend in the length of time to fulfill a request.
Business Objective	Accelerate Agility
Description	The average duration of Scope Changes from the time they are opened to the time they are closed.
Context	DemandManagement
Data source	PPM
Formula	DATE_CONVERT('ms','h', AVG(ScopeChange.CloseTime, ScopeChange.CloseTime is not Null and ScopeChange.StartDate IN_PERIOD) - AVG(ScopeChange.StartDate, ScopeChange.CloseTime is not Null and ScopeChange.StartDate IN_PERIOD))
KPI Formula Filter	N/A
Unit Type	Hours
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 24 | 24 to 48 | 48 to 72
Release	9.02

Average Time to Resolve Production Defect KPI

Component Type	KPI
Business Questions	Make sure our post-release defect resolution procedures are efficient.
Business Objective	Improve Quality of Delivery
Description	The average time needed to fix a defect in production. Production Defect is a post release defect (detected after the release end date).
Context	ALM_Defect
Data source	ALM, PPM
Formula	DATE_CONVERT('ms','d', AVG(Defect.ClosedDate,Defect.DetectedDate>Project.EndDate and Defect.ClosedDate IN_PERIOD)-AVG(Defect.DetectedDate,Defect.DetectedDate>Project.EndDate and Defect.ClosedDate IN_PERIOD))
KPI Formula Filter	N/A
Unit Type	Days
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 7 | 7 to 14 | 14 to 28
Release	9.02

Demands Backlog

Component Type	KPI
Business Questions	Provides the PMO with an insight into the opened demands, those that are not yet approved or denied.
Business Objective	Improve Customer Satisfaction
Description	The number of demands that are not yet approved or denied.
Context	DemandManagement
Data source	PPM
Formula	COUNT(Demand,((Demand.ActiveProcess='Y' AND Demand.Status='IN_PROGRESS' AND Demand.StartDate<=NOW) OR (Demand.CloseTime>NOW AND Demand.StartDate<=NOW)))
KPI Formula Filter	N/A
Unit Type	#
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 25 | 25 to 50 | 50 to 100
Release	9.02

Deviation of Planned Work Hours KPI

Component Type	KPI
Business Questions	Make sure our project planning processes are efficient.
Business Objective	Improve Project Execution
Description	The sum of the Actual Effort and the Remaining Estimated Effort, relative to the Planned Effort for project tasks started during the measurement period.
Context	ProjectPortfolioManagement
Data source	PPM
Formula	PERCENTAGE_MATH(SUM(ProjectTask.ActualHours, ProjectTask.StartDate IN_PERIOD)+SUM (ProjectTask.EstimatedRemainingHours, ProjectTask.StartDate IN_PERIOD),SUM (ProjectTask.PlannedHours, ProjectTask.StartDate IN_PERIOD),100)-100
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Centralize
Thresholds	-40 to -20 | -20 to -10 | -10 to 10 | 10 to 20 | 20 to 40
Release	9.00

Innovation Delivery KPI

Component Type	KPI
Business Questions	Make sure our discretionary spending is aligned with our innovation goals. What are the discretionary and non-discretionary values for the fiscal period? How does discretionary spending compare to non-discretionary spending? What is the percentage of total discretionary and non-discretionary spending?
Business Objective	Alignment with Business Strategy
Description	The discretionary cost divided by the actual cost.
Context	FinancialManagement
Data source	PPM, AM, VCM, IC, HPV, AWS
Formula	PERCENTAGE_MATH(SUM(Cost.Amount, Cost.IsDiscretionary='Y' and PERIOD_ ENTITY=Period),SUM(Cost.Amount,PERIOD_ENTITY=Period),30)
KPI Formula Filter	N/A
Unit Type	%
Time Period	Monthly
Direction	Centralize
Thresholds	0 to 10 | 10 to 20 | 20 to 40 | 40 to 50 | 50 to 100
Release	9.00

Number of Applications in Lifecycle Categories Metric

Component Type	Metric
Business Questions	N/A
Business Objective	N/A
Description	The number of Applications in each lifecycle categories, including all four categories for active application (Invest/Sustain/Sunset/Decommission).
Context	ApplicationPortfolioManagement
Data source	PPM
Formula	COUNT(APMApplication, ((APMApplication.StartDate<=NOW AND APMApplication.Status='IN_ PROGRESS') or (APMApplication.CloseTime>NOW AND APMApplication.StartDate<=NOW)) And (APMApplication.Disposition ='Sustain' or APMApplication.Disposition ='Sunset' or APMApplication.Disposition ='Decommission' or APMApplication.Disposition ='Invest'))
KPI Formula Filter	N/A
Unit Type	#
Time Period	Monthly
Direction	Maximize
Thresholds	N/A
Release	9.30

Number of Applications in the Portfolio Metric

Component Type	Metric
Business Questions	N/A
Business Objective	N/A
Description	The number of applications active during the measurement period. The application assessments and transformations often result in a reduction in the total number of applications.
Context	ApplicationPortfolioManagement
Data source	PPM
Formula	COUNT(APMApplication, APMApplication.Status='IN_PROGRESS' And (APMApplication.Disposition ='Sustain' or APMApplication.Disposition ='Sunset' or APMApplication.Disposition ='Decommission' or APMApplication.Disposition ='Invest') And APMApplication.PlacedInServiceDate is not Null and APMApplication.PlacedInServiceDate IN_PERIOD)
KPI Formula Filter	N/A
Unit Type	#
Time Period	Monthly
Direction	Maximize
Thresholds	N/A
Release	9.30

Data Lineage

Number of Escaped Defects KPI

Component Type	KPI
Business Questions	Make sure our pre-production quality testing procedures are efficient.
Business Objective	Improve Quality
Description	The number of defects that were not discovered during pre-production quality testing, and were found after the release (their discovery date is after the release).
Context	ALM_Defect
Data source	ALM, PPM
Formula	Count(Defect,Defect.DetectedDate>Project.EndDate and Defect.DetectedDate <= END_PERIOD)
KPI Formula Filter	N/A
Unit Type	#
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 20 | 20 to 50 | 50 to 100
Release	9.02

Number of Identified Issues KPI

Component Type	KPI
Business Questions	Make sure that the issue identification procedures are efficient.
Business Objective	Improve Project Execution
Description	The number of Issues that are identified.
Context	ProjectPortfolioManagement
Data source	PPM
Formula	COUNT(ProjectIssue, ProjectIssue.IdentifiedDate IN_PERIOD)
KPI Formula Filter	N/A
Unit Type	#
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 25 | 25 to 50 | 50 to 100
Release	9.01

Number of Opened Risks KPI

Component Type	KPI
Business Questions	Make sure our risk handling procedures are efficient.
Business Objective	Improve Project Execution
Description	The number of Risks that are opened during the measurement period.
Context	ProjectPortfolioManagement
Data source	PPM
Formula	COUNT(ProjectRisk, ProjectRisk.StartDate IN_PERIOD)
KPI Formula Filter	N/A
Unit Type	#
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 25 | 25 to 50 | 50 to 100
Release	9.01

Project Scope Changes Backlog KPI

Component Type	KPI
Business Questions	Provides the PMO with information about the opened Scope Changes (the Scope Changes that are not yet approved or denied)
Business Objective	Improve Customer Satisfaction
Description	The number of Scope Changes that are not yet approved or denied.
Context	DemandManagement
Data source	PPM
Formula	COUNT(ScopeChange,(ScopeChange.ActiveProcess='Y' AND ScopeChange.Status='IN_ PROGRESS' AND ScopeChange.StartDate<=NOW))
KPI Formula Filter	N/A
Unit Type	#
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 25 | 25 to 50 | 50 to 100
Release	9.02

Proposals Backlog KPI

Component Type	KPI
Business Questions	Provides the PMO with an insight into the opened Proposals, those that are not yet approved or denied.
Business Objective	Improve Customer Satisfaction
Description	The number of Proposals that are not yet approved or denied.
Context	DemandManagement
Data source	PPM
Formula	COUNT(Proposal,(Proposal.ActiveProcess='Y' AND Proposal.Status='IN_PROGRESS' AND Proposal.StartDate<=NOW))
KPI Formula Filter	N/A
Unit Type	#
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 25 | 25 to 50 | 50 to 100
Release	9.02

Time to Resolve Project Scope Change KPI

Component Type	KPI
Business Questions	Make sure our project scope change procedures are efficient.
Business Objective	Accelerate Agility
Description	The average time of Project Scope Change to resolution.
Context	DemandManagement
Data source	PPM, ALM, AM
Formula	DATE_CONVERT('ms','d', AVG(ScopeChange.CloseTime, Project.Name is not null And ScopeChange.CloseTime is not Null and ScopeChange.StartDate IN_PERIOD) - AVG (ScopeChange.StartDate, Project.Name is not null and ScopeChange.CloseTime is not Null And ScopeChange.StartDate IN_PERIOD))
KPI Formula Filter	N/A
Unit Type	Days
Time Period	Monthly
Direction	Minimize
Thresholds	0 to 20 | 20 to 40 | 40 to 60 | 60 to 80 | 80 to 100
Release	9.02

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