HP Executive Scorecard

For the Windows ® operating system

Software Version: 9.01

General Admin Guide

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The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
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To find more information about access levels, go to:

http://h20230.www2.hp.com/new_access_levels.jsp

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Note: Some topics do not convert properly to PDF, causing format problems. Some elements of online help are completely removed from the PDF version. Those problem topics can be successfully printed from within the online help.

Contents

Getting Started

The IT Executive Scorecard is accessed through the main Login page. Click the **Admin** tab to access all of the Admin pages.

Getting started includes the following:

- **"Login" (on page 9)** Describes how to log in to the Admin tab and the various user types.
- **"LDAP Support" (on page 12)** Describes LDAP authentication through SAP BusinessObjects Enterprise for HP and FPA.
- **"LW-SSO " (on page 13)** Describes the Lightweight SSO connection for the IT Executive Scorecard application.
- **"Use the Identity Management Single Sign-On" (on page 14)** Describes the method of access control that enables you to navigate to other HP products without supplying credentials again.
- **"Logs " (on page 16)** Describes the log and log files locations.
- **"Web Server" (on page 20)** Describes the web server capabilities.
- **"Cryptography" (on page 20)** Describes the two types of key encryption.

Login

You access the IT Executive Scorecard application using a supported Web browser, from any computer with a network connection (intranet or Internet) to the servers. Currently Microsoft Internet Explorer 8 is supported. It is recommended to restore your browser settings to default.

The level of access granted to a user depends on the user's permissions. For details, see "Manage Users and Groups" (on page 23).

You can initially access the Admin tab through the IT Executive Scorecard login page, using your SAP BusinessObjects Enterprise for IT Executive Scorecard or username and password, created during installation.

Access the login page as follows: http://<full resolution host>:<port>/xs. If you are using a non-default port you must update it in the URL. For details, see "Web Server" (on page 20). If you are using a default http then the port can remain empty. For details, see "How to Access the Admin Tab" (on page 11).

The Admin tab is configured by default with Lightweight Single Sign-On (LW-SSO). LW-SSO enables you to log in and automatically have access to LW HP applications, without needing to log into those applications. For details, see "LW-SSO " (on page 13).

Working with Secure Sockets Layer (SSL) in a Distributed Environment

When you log in to the IT Executive Scorecard application using the **http** or **https** format in a distributed environment, the following scenarios can occur:

1. When you use the **http** format to access the Executive Scorecard application, the authentication transfers you to the Data Warehouse application. A message states that a security certificate is issued. Click the **Continue to this website** link. In the Data Warehouse page, click the Certificate Error button in the browser toolbar. In the Certificate dialog box that opens, click the **View Certificate** link. In the wizard that opens, select the **Place all certificates in the following store**, select the **Trusted Root Certification Authorities** location, and click **OK**. Once you have installed the certificate, and entered your user and password, the Data Warehouse application transfers you back to the Executive Scorecard application.
2. When you use the **http** format to access directly the Data Warehouse application, a message states that a security certificate is issued. Click the **Continue to this website** link. In the Data Warehouse page, click the Certificate Error button in the browser toolbar. In the Certificate dialog box that opens, click the **View Certificate** link. In the wizard that opens, select the **Place all certificates in the following store**, select the **Trusted Root Certification Authorities** location, and click **OK**. Once you have installed the certificate, and entered your user and password, the Data Warehouse application opens.
3. When you use the **https** format to access the Executive Scorecard application, the security certificate issue is displayed. Click the security certificate. In the Certificate dialog box that opens, click the **View Certificate** link. In the wizard that opens, select the **Place all certificates in the following store**,select the **Trusted Root Certification Authorities** location, and click **OK**. Continue running the wizard. This warning message is not displayed again. The Data Warehouse application opens in SSL mode. After performing the log in operation, you can add the Executive Scorecard certificate in the successfully launched Executive Scorecard application page, not in the application page itself. When the **Java security warning** contains the correct publisher (Hewlett-Packard Company) you should accept the **Java security warning** by marking the **Always trust content from this publisher** check box in order for this popup not to be displayed again.
4. When you use the **https** format to access directly the Data Warehouse application, a message states that a security certificate is issued.In the Certificate dialog box that opens, click the **View Certificate** link. In the wizard that opens, select the **Place all certificates in the following store**, select the **Trusted Root Certification Authorities** location, and click **OK**. This warning message is not displayed again. The Data Warehouse application opens in SSL mode. When the **Java security warning** contains the correct publisher (Hewlett-Packard Company) you should accept the **Java security warning** by marking the **Always trust content from this publisher** check box in order for this popup not to be displayed again.

Note: When you use the **https** format and you want to access SAP BusinessObjects Enterprise for IT Executive Scorecard reports, the reports are displayed using the **http** format.

Logout

To logout:

You can log out using one of the following procedures:

- Click **Logout** (in the top right corner of the application). The session closes. To log in again, you must provide the user and password.
- Click **X** (in the top right corner of the application). The session stays alive for one hour. To log in again, you do not have to provide the user and password.

User Authentication

The following users can login successfully:

- **Enterprise Users:** Users created in SAP BusinessObjects Enterprise for IT Executive Scorecard or .
- **LDAP Users:** Users created in LDAP and connected through SAP BusinessObjects Enterprise for IT Executive Scorecard or .

Users that are created in the Admin tab are automatically added to SAP BusinessObjects Enterprise for IT Executive Scorecard or .

Note: Users that are created in the Admin tab and require permissions to view reports pages, must be assigned those permissions in SAP BusinessObjects Enterprise for IT Executive Scorecard.

Shared Secret Key

Executive Scorecard functionality requires a connection to SAP BusinessObjects Enterprise for IT Executive Scorecard or through a trusted authentication. In order to configure the trusted authentication policy you must define the shared secret key.

The shared secret key, created in the post-install process, is used by the client and the CMS to create the trusted authentication password. This password is used to establish trust.

Note: To change the shared secret key you must change the key in SAP BusinessObjects Enterprise for IT Executive Scorecard, run the post-install wizard and enter the new shared secret key. For details, see the *Executive Scorecard Installation and Configuration Guide*.

How to Access the Admin Tab

You access the Admin tab from the main login page.

When you have completed your session, it is recommended that you log out to prevent unauthorized entry.

To access the IT Executive Scorecard login page and the Admin tab:

1. In a Web browser, enter the URL **http://<server_name>.<domain_name>/XS** for the fully qualified machine where XS is installed.
2. Enter the login parameters (login name and password) of a user, and click **Log In**. After a successful login, the user name appears at the top right of the page of the application.
3. Close the original login window once the application has loaded.
4. Click the Admin tab to navigate the admin pages. Only users with the required permissions can view the Admin tab.

Notes:

- To log in for the first time, use your or username and pSAP BusinessObjects Enterprise for IT Executive Scorecardassword created during installation.
- The Admin tab can also be accessed through the Data Warehouse.

Password Conventions

Passwords can be changed in the **User Details** pane of the User Management page. Click **Edit Details** to change a user's password. For details, see " User Management Page " (on page 26).

A password must contain the following:

- At least 6 characters.
- Characters in upper and lower case.
- Must be different from username.

Notes:

- Login parameters are case sensitive.
- If a password does not follow the correct conventions then the user is still created in SAP BusinessObjects Enterprise for IT Executive Scorecard or , however the password is not valid and must be changed.

LDAP Support

The SAP BusinessObjects User Management System supports LDAP authentication for user and group accounts. Before users can use their LDAP user name and password to log on, you need to map their LDAP account to the SAP BusinessObjects Enterprise for IT Executive Scorecard or . Before setting up and enabling LDAP authentication, make sure that your LDAP directory is set up.

Notes:

- All users in SAP BusinessObjects Enterprise for IT Executive Scorecard or can login to IT Executive Scorecard.
- Users can only be created under the Enterprise group in the Admin tab, meaning they are added as users in SAP BusinessObjects Enterprise for IT Executive Scorecard or . Enterprise users are created in the Enterprise schema. LDAP users which are generated from LDAP configuration can be mapped to SAP BusinessObjects Enterprise for IT Executive Scorecard or .
- Users or groups can be added under existing LDAP groups, however they are not added to LDAP, only to SAP BusinessObjects Enterprise for IT Executive Scorecard or .
- When a user is added to LDAP, it is displayed in the Users and Groups tree after you log in to IT Executive Scorecard.
- Password change is updated in only SAP BusinessObjects Enterprise for IT Executive Scorecard and not in LDAP (including LDAP users).

Start Menu

During the installation, a start menu is added to the settings of the machine on which Executive Scorecard was installed.

To access the IT Executive Scorecard start menu that is added to each machine, select **Start** > **Programs** > **HP Executive Scorecard**.

The menu includes the following options:

- **HP Executive Scorecard** : Launches IT Executive Scorecard.
- "Administration Menu" (on page 13)
- "Documentation Menu" (on page 13)

Administration Menu

The IT Executive Scorecard Administration menu enables you to access the following options:

Sub-option	Description
Configuration Wizard	Starts the post-install Configuration Wizard .
Disable HP Executive Scorecard	Disables the Glassfish Web Server. Users cannot access IT Executive Scorecard.
Enable HP Executive Scorecard	Enables the Glassfish Web Server. Users can access IT Executive Scorecard.
License Renewal	Enables users to renew their IT Executive Scorecard license. **Note:** After renewing a license, you must Disable HP Executive Scorecard and then Enable HP Executive Scorecard on the Data Warehouse and Executive Scorecard component servers. It is preferable to renew the license on the Executive Scorecard machine.
Uninstall HP Executive Scorecard	Uninstalls the IT Executive Scorecard on the server.

Documentation Menu

The IT Executive Scorecard Documentation menu enables you to access the following options:

Sub-option	Description
HP Executive Scorecard Deployment	Opens the *Executive Scorecard Installation and Configuration Guide*.
HP Executive Scorecard Documentation Library	Opens the HP Executive Scorecard Documentation Library home page in your Web browser.

LW-SSO

HP Lightweight Single Sign-On is a method of access control that enables you to navigate to other HP products that implement LW-SSO without suppling credentials again. A user can log on once and gain access to the resources of HP software systems without being prompted to log on again.

The applications inside the configured group of software systems trust the authentication, and there is no need for further authentication when moving from one application to another.

Use the Identity Management Single Sign-On

Identity Management Single Sign-On (IDM-SSO) is a method of access control that enables you to navigate to other HP products without supplying credentials again. A user can log on once and gain access to the resources of HP software systems without being prompted to log on again. The applications inside the configured group of software systems trust the authentication, and there is no need for further authentication when moving from one application to another.

Learn about Identity Management

You implement Identity Management Single Sign-On (IDM-SSO) if you want a more secure connection than that offered by LW-SSO, or if the applications configured outside of Executive Scorecard do not support LW-SSO. The IDM server is monitored by a single center Policy Server, and consists of a User Repository, a Policy Store (both could reside over the same server as the Policy Server), and a Web Server Agent installed over each of the application's web servers communicating with the Policy Server. The IDM server controls users' access to various organizational resources, protecting confidential personal and business information from unauthorized users. For details, see your IDM vendor's documentation.

Executive Scorecard requires the IDM vendor to store user information to render it available as a header on http requests.

Before configuring IDM-SSO in Executive Scorecard, make sure you see your IDM login dialog before the BSM login screen.

If you do not see it, work with your IDM administrator. If the same LDAP was defined in Executive Scorecard as used by IDM, you should be able to authenticate through both the IDM and Executive Scorecard login screens using the same credentials. If not, verify that LDAP settings in Executive Scorecard match those used by IDM. Now you are ready to configure IDM-SSO in Executive Scorecard. If you need help dumping headers in order to determine the correct IDM header to use in configuration, you can return to the Executive Scorecard login screen without closing the session and append **/DumpSession.jsp** to the login URL. Look for your user login ID in the resulting list. Before it should be the header name supplied by IDM. You can verify it using **http://<HPBSM server>/topaz/verifyIDM.jsp** in the same user session. Once it is verified as correct, you should be able to use it in the Authentication Management wizard.

Configure to use IDM-SSO

To use IDM-SSO to authenticate the users of the Executive Scorecard application, proceed as follows:

1. Make sure that IDM is linked to the user repository (LDAP) and that these users are users of SAP BusinessObjects Enterprise for IT Executive Scorecard or .
2. Make sure that at least one user in IDM has an Admin role in Executive Scorecard for troubleshooting purposes.
3. Install the IDM SSO Agent on both the Executive Scorecard Web Server and the Data Warehouse Web Server. You do not need to install it on the SAP BusinessObjects Enterprise Web server.

4. On the IDM server, configure the security by setting the following Uniform Resource Identifiers (URIs) as protected or unprotected resources as indicated below.
   - If you have single server configuration, do the following:

Resource	Protected	Unprotected
fndwar	Yes	
bsf	Yes	
uim	Yes	
engine	Yes	
studio-client	Yes	
dashboard-webapp	Yes	
fndwar/rs		Yes
bsf/rest		Yes
dw	Yes	
dw-web	Yes	
integrations	Yes	

   - If you have a distributed server configuration, do the following:

Server	Resource	Protected	Unprotected
On the Executive Scorecard server	fndwar	Yes	
	bsf	Yes	
	uim	Yes	
	engine	Yes	
	studio-client	Yes	
	dashboard-webapp	Yes	
	fndwar/rs		Yes
	bsf/rest		Yes
On the Data Warehouse server	fndwar	Yes	
	bsf	Yes	
	uim	Yes	

Server	Resource	Protected	Unprotected
	dw	Yes	
	dw-web	Yes	
	integrations	Yes	
	fndwar/rs		Yes
	bsf/rest		Yes

5. For Logoff use the /fndwar/logout.jsp URI on the IDM server.
6. Open the Executive Scorecard application. You will need to provide your credentials twice at this stage: once in the IDM login page and once in the Executive Scorecard login page.
7. In the Executive Scorecard application, click **Admin** > **Foundation Settings** > **Single Sign-On**.
8. Select **ID Management Enabled**.
9. Enter the name of the IDM header (the header that contains the user login name) in the **Value** field of the **ID Management Header** setting.
10. Click **Save**.
11. Log out of the Executive Scorecard application and of the IDM application. Log in again with the proper user and check that you need to provide your credentials only once.

Logs

IT Executive Scorecard records the procedures and actions performed by the various components in log files. The log files are usually designed to serve HP Software Support when Executive Scorecard does not perform as expected. The default severity threshold level for log files differs per log, but is generally set to either Warning or Error.

You can view log files with any text editor.

Log File Locations

The following tables list the log files created in an Executive Scorecard implementation by component.

Common Component Log Files

Description	Log Filename	Location
Records all requests processed by the server.	**access.log**	**<Installationdirectory>\agora\webserver\logs**
The server error log is the most important log file. This is the place where Apache httpd sends	**error.log**	**<Installationdirectory>\agora\webserver\logs**

Description	Log Filename	Location
diagnostic information and records any errors that it encounters when processing requests. It is the first place to look when a problem occurs with starting or operating the Web Server.		
	install.log	**<Installationdirectory>\agora\webserver\logs**
Contains information about communications between the Web Server and the application server (Glassfish).	**jk.log**	**<Installationdirectory>\agora\webserver\logs**
Log records of all secured requests processed by the Web Server.	**ssl_request.log**	**<Installationdirectory>\agora\webserver\logs**
Logs the post-install flow. Is useful when the post-install configuration wizard fails.	**ConfigWizard.log**	**<Installationdirectory>\agora\confwizard\log**
Logs file parsing tasks during post-install configuration wizard.	**FileParser.log**	**<Installationdirectory>\agora\confwizard\log**
Logs application loading and permission enforcement related to the application framework.	**applicationfw.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
Logs requests for authentication and population of user roles and permissions.	**athN.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
Logs user management user interface details.	**aui.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
Logs the usage of SAP BusinessObjects services, including issues locating the SAP BusinessObjects CMS.	**bo-services.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
BTO Security Framework (BSF) server side logs authentication information about authn, LW-SSO, and	**bsf.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**

Description	Log Filename	Location
user mng.		
Logs the usage of foundation services.	**btoe-services.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
Logs SAP BusinessObjects datalayer transactions such as problems with SAP BusinessObject Universes or queries.	**datalayer.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
Foundation core components log.	**foundation.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
Hibernate log .	**hibernate.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
JVM general log.	**jvm.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
Licensing logs.	**license-services.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
Properties table logs.	**properties.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
General GlassFish log.	**server .log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
Settings management logs	**settings.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
Logs authentication details related to IDM and LW SSO.	**sso.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
User Interface mash-up logs.	**uim.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
User Management actions log, including problems with communication to SAP BusinessObjects.	**userMng.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
MQ Broker service log.	**log.txt**	**<Installationdirectory>\agora\glassfish\glassfish\domains\domain1\imq\instances\imqbroker_host1\log**

Executive Scorecard Log Files

Description	Log filename	Location
Logs all the	**dashboard.log**	**<Installationdirectory>**

Description	Log filename	Location
dashboard's server side logs.		**\agora\glassfish\glassfish\domains\BTOA\logs**
Logs general information for Executive Scorecard Studio, the client module used for tailoring Executive Scorecard.	**studio.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
Logs general information about the engine, and KPIs.	**engine.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**
Provides a summary of calculation cycles, and statistics about KPI engine performance.	**engine_statistics.log**	**<Installationdirectory>\agora\glassfish\glassfish\domains\BTOA\logs**

Data Warehouse Log Files

Log files can be accessed under:

- **datawarehouse\logs**
- **C:\<Installationdirectory>\agora\glassfish\glassfish\domains\btoa\logs\server.log**

All information in the Data Warehouse log files is automatically sent to the Windows Event Viewer Application log.

To access Data Warehouse log information:

1. On the Windows taskbar, click **Start** > **Administrative Tasks** > **Event Viewer**.
2. Expand **Windows Logs**, right-click **Application**, and then click **Filter Current Log**.
3. Select the relevant **Event Levels**, select the relevant **Event Sources**, and then click **OK**.

   All the Data Warehouse Event Sources begin with the DWH string.

Web Server

IT Executive Scorecard uses the Apache web server for securing the application and caching static content in order to improve client performance. The web server is installed and configured in the deployment procedure and does not require any changes or maintenance.

By default, the web server port is **80** for **http** and **443** for **https**. If you use a non default port for the URL, you must enter the application using **http:\\<host>:<port number>\xs** or **http:\\<host>:<port number>\dwh**.

Note: These ports can be configured to any other ports in the deployment procedure.

Cryptography

The encryption properties files are located in **<Installationdirectory>\agora\conf**. The path can be determined by setting the **crypt.conf.dir.path** system property to the relevant path. The management database credentials encrypted locally on each server. You must also store all the relevant configuration for decrypting locally.

The following encryption keys are available:

- **Encryption Key:** Single shared key for all servers shared through the database.Stored on each machine locally in the encryption properties files as part of the post-install procedure.
- **Seed Key:** Key that is generated after each post-install procedure. The main encryption key is stored in the seed key.

Configure the Settings Using the Admin Tab

This section describes the available pages in the Admin tab.

Note: The pages that are displayed depend on the permissions allowed for each user and the particular application installation.

1. "Manage Users, Groups, Roles and Resources" (on page 22)
2. "Manage Foundation Settings " (on page 49)
3. "Manage Scorecard Settings " (on page 56)
4. "Manage Data Sources" (on page 57)
5. "Manage the Data Warehouse Settings " (on page 58)

Users and Roles

Define users, roles and resources according to the following tasks:

1. "Manage Users and Groups" (on page 23)
2. "Manage Roles" (on page 33)
3. "Manage Resources" (on page 42)

Foundation Settings

Define the foundation settings according to the following tasks:

1. "How to Define Website Settings" (on page 50)
2. "How to Define Pages Settings" (on page 52)
3. "How to Define Single Sign-On Settings" (on page 54)

Scorecard Settings

Define the scorecard settings.

For details, see the *IT Executive Scorecard Admin Guide*.

Data Source Management

Activate or deactivate data sources.

For details, see the *Data Warehouse Admin Guide*.

Data Warehouse Settings

Define the data warehouse settings.

For details, see the *Data Warehouse Admin Guide*.

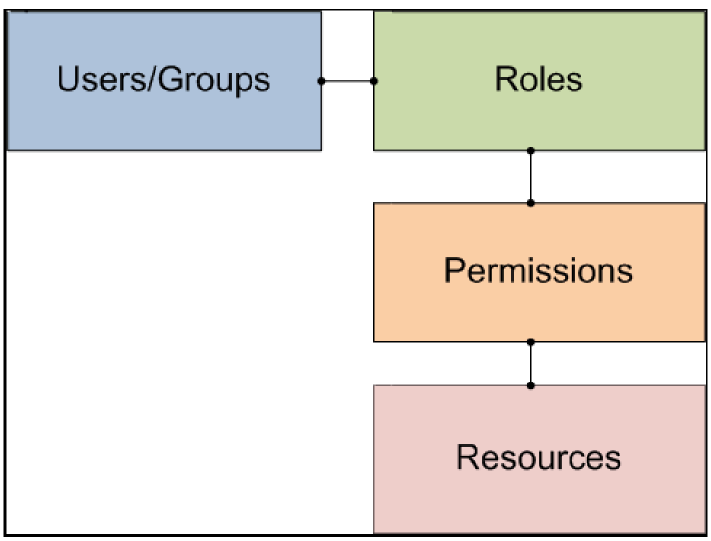
Manage Users, Groups, Roles and Resources

The **Users and Roles** tab enables you to define users, groups, and their associated roles, permissions, and resources. The **Users and Roles** tab includes the following pages:

- **" User Management Page " (on page 26)**. Enables you to add and edit users and groups as well as attach roles to users and groups.
- **" Role Management Page " (on page 35)**. Enables you to add and edit roles, assign permissions to roles, as well as assign resources to permissions.
- **"Resource Management Page" (on page 44)**. Enables you to select instances of pages for specific resources.

User Management Diagram

The following diagram illustrates the relationship between users, groups, roles, permissions, and resources in the Admin tab.



SAP BusinessObjects Enterprise for IT Executive Scorecard User

Because of the limitation of running up to twenty documents (queries to the SAP BusinessObjects Enterprise for IT Executive Scorecard engine) per user and to obtain a better performance, the SAP BusinessObjects Enterprise for IT Executive Scorecard user (default **XSDataUser**) is available as an additional user.

The KPI engine runs the KPI calculations and accesses the Data Layer (DAL) to run queries using the **XSDataUser** user to log in. The user has Administrator role and permissions. You can change the default user to another administrator user. For details, see "How to Define Business Objects Settings" (on page 49).

This section includes the following topics:

"Manage Users and Groups" (on page 23)

"Manage Roles" (on page 33)

"Manage Resources" (on page 42)

Manage Users and Groups

The User Management page enables you to manage users and groups according to the following tasks:

"How to Search for Users " (on page 23)

"How to Add and Edit Users" (on page 23)

"How to Add and Edit Groups" (on page 24)

"How To Delete Users or Groups" (on page 24)

"How to Assign Roles to Users" (on page 24)

"How to View Permissions and Resources" (on page 25)

For details see " User Management Page " (on page 26)

How to Search for Users

To search for a user:

1. Select **Admin** > **Users and Roles** > **User Management**.
2. In the **Search Users** tab, enter the search criteria.
3. Click **Search**. The relevant users are displayed.

For details, see " User Management Page " (on page 26)

How to Add and Edit Users

The User Management page enables you to add users or edit user details for system administration.

To add a user:

1. Select **Admin** > **Users and Roles** > **User Management**.
2. In the **Users & Groups** tab, select the group under which you want to add a user and click **Add User** . The Add user dialog box opens.
3. Enter the relevant details.

To edit user details:

1. Select **Admin** > **Users and Roles** > **User Management**.
2. Select a user and click **Edit Details** in the **User Details** area. The Update user details dialog box opens.
3. Enter the relevant details, including setting a new password, if relevant.

For details see " User Management Page " (on page 26).

How to Add and Edit Groups

The User Management page enables you to add or edit groups for system administration.

To add a new group under the root:

1. Select **Admin** > **Users and Roles** > **User Management**.
2. In the **Users & Groups** tab, click **Add group under the root** .
3. Enter the **Group Name** and **Group Description** and click **OK**. The group is added under the root.

To add a group under an existing group:

1. Select **Admin** > **Users and Roles** > **User Management**.
2. In the **Users & Groups** tab, select a group and click **Create group** .
3. Enter the **Group Name** and **Group Description** and click **OK**. The group is added under an existing group.

To edit group details:

1. Select **Admin** > **Users and Roles** > **User Management**.
2. Select a group from the Users and Groups tree and click **Edit Details** in the **Group Details** area.
3. Enter the relevant changes and click **OK** .

For details, see " User Management Page " (on page 26) .

How To Delete Users or Groups

To delete a user or group:

1. Select **Admin** > **Users and Roles** > **User Management**.
2. In the **Users & Groups** tab, select a user or group and click **Delete** .
3. The user or group is deleted.

Note: When a group is deleted, its users still exist under a system group called Everyone.

For details, see " User Management Page " (on page 26).

How to Assign Roles to Users

The User Management page enables you to assign specific roles (based on resources and permissions) to each user or group.

To create a resource with relevant pages that can be accessed according to permissions:

See "How to Create a Resource" (on page 42).

To create a role with relevant permissions:

See "How to Create or Delete a Role" (on page 33)

To assign roles to users or groups:

1. Select **Admin** > **Users and Roles** > **User Management**.
2. Select a user or group from the **Users & Groups** tab.
3. In the **Roles and Permissions** area, click **Assign role** ➕. The Assign Roles dialog box opens.
4. Select a role from the **Available Roles** list and use the arrows to move the role to the **Selected Roles** list.
5. Click **OK** to save your selections.

For details see "Assign Roles Dialog Box " (on page 32) .

How to View Permissions and Resources

The User Management page enables you to view the available permissions and resources for each user.

To view permissions and resources for specific users:

1. Select **Admin** > **Users and Roles** > **User Management**.
2. Select a user from the **Users & Groups** tab.
3. In the **Roles and Permissions** area, select a role to view the permissions and resources associated with the role.

For details, see " User Management Page " (on page 26) .

User Management

The User Management page enables you to add and edit users and groups, as well as add and edit their details.

Users and Groups

Each user has a list of roles that define their permissions. When you assign a role, that user only has access to specific portions of the program and specific resources that are relevant to their role. You can also define groups of users with the same roles or access rights. When you attach a user or group to a group, the user or group inherits all of the group's roles.

Roles and Permissions

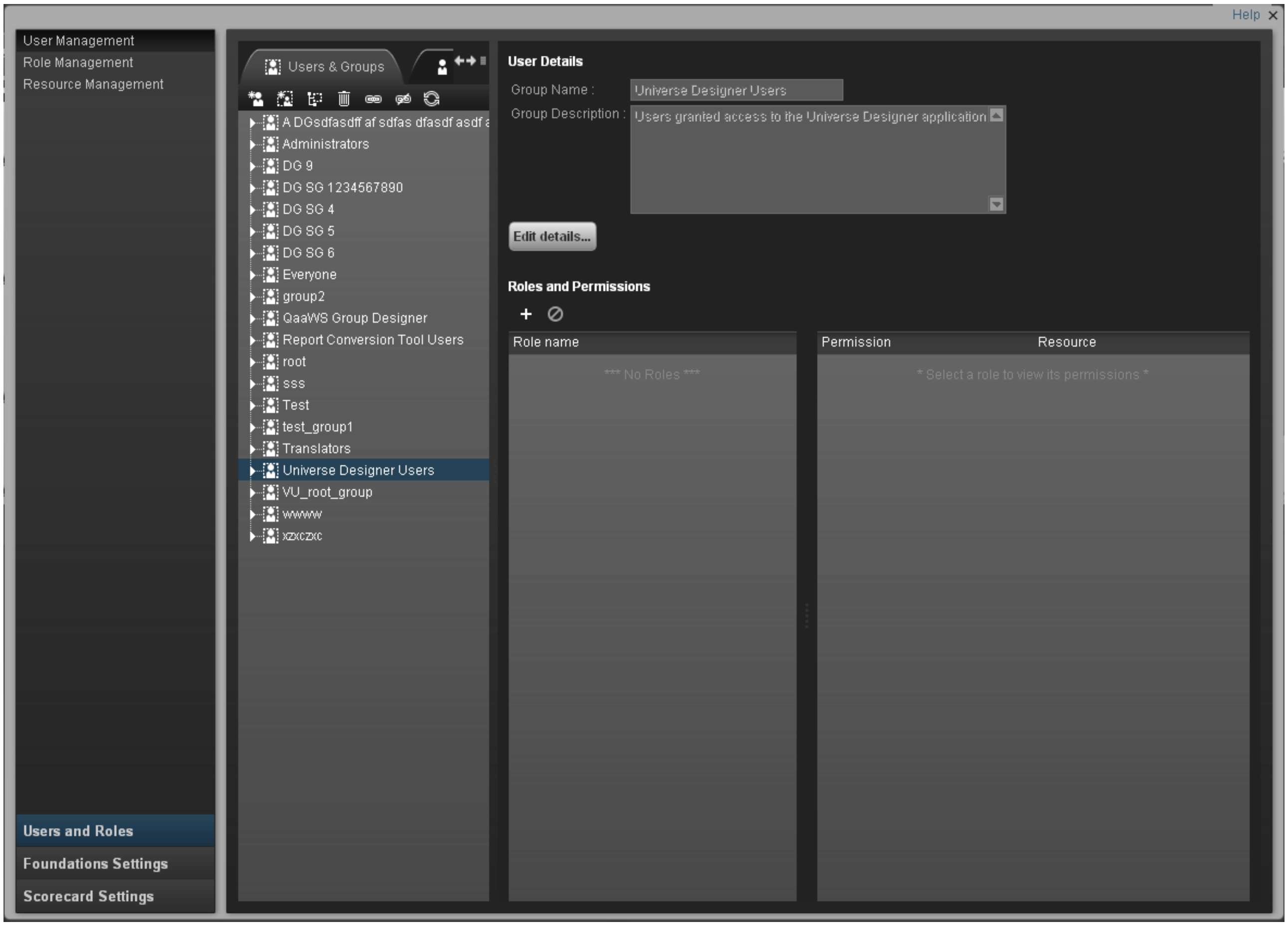
Each role is associated with permissions. Permissions define which actions the user with a specific role can perform according to their responsibilities in the organization. For example, you can create a role that enables its users to create pages.

User Management UI TOC

User Management includes the following UI topics:

User Management Page

This page enables you to create users and groups, and to assign roles. The users defined in User Management are only relevant for the Executive Scorecard or Data Warehouse components.

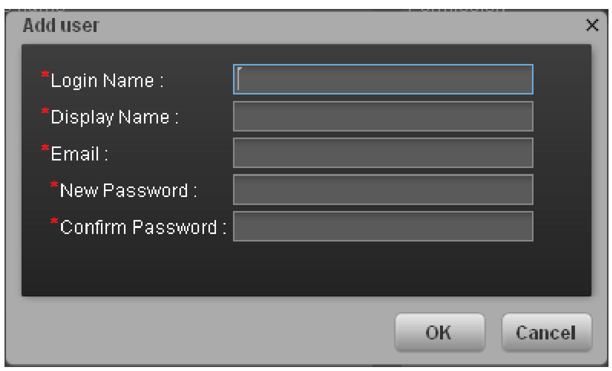
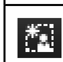


To access	Select **Admin** > **Users and Roles** > **User Management**.
Important information	Two types of users and groups exist: • **Enterprise Users and Groups:** Created in and managed through SAP BusinessObjects Enterprise for IT Executive Scorecard or . All SAP BusinessObjects Enterprise for IT Executive Scorecard or users and groups appear in the Admin tab. Only this type of users and groups can be created in the Admin tab. • **LDAP Users:** Created in LDAP and managed through SAP BusinessObjects Enterprise for IT Executive Scorecard or . It is recommended to define roles and resources prior to defining users. For details, see " Role Management Page " (on page 35) and "Resource Management Page" (on page 44). Click **Refresh**  to refresh the display.

Relevant Tasks	"Manage Users and Groups" (on page 23)

Users & Groups Tab

User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
Users and Groups tree	A tree containing all of the existing groups and users attached to those groups. **Note:** To find users that are not attached to a specific group, but are under the group **Everyone**, use the **Search Users** tab. For details, see "Search Users Tab" (on page 29) **Note:** When a user is added to LDAP, it is displayed in the Users and Groups tree after you log in to IT Executive Scorecard.
	Displays either the **Users & Groups** tab or the **Search User** tab.
	**Create User**. Adds a new user under the selected group. The user inherits the group's roles.  Enter the user's **Login Name**, **Display Name**, **Email**, and **New Password** and click **OK**.
	**Create group**. Creates a new group under a selected existing group. The group inherits the existing group's hierarchy.

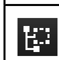
<table>
<tr><th>UI Element</th><th>Description</th></tr>
<tr><td></td><td>

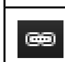

Enter the **Group Name** and **Group Description** and click **OK**.

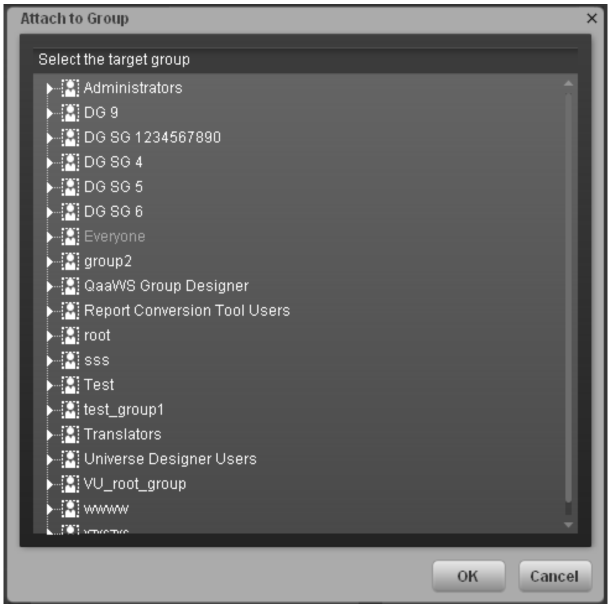
Available Groups

- **Administrators.** Users who can administer the system.
- **Everyone.** All users of the system.

Note: The following groups are the default groups available in SAP BusinessObjects Enterprise for IT Executive Scorecard or and exported to the Admin tab. They are not applicable to the Executive Scorecard application.

- QaaWS Group Designer
- Report Conversion Group Users
- Test Root
- Translators
- Universe Design Users
</td></tr>
<tr><td></td><td>
Add group under the root. Creates a new group under the root.

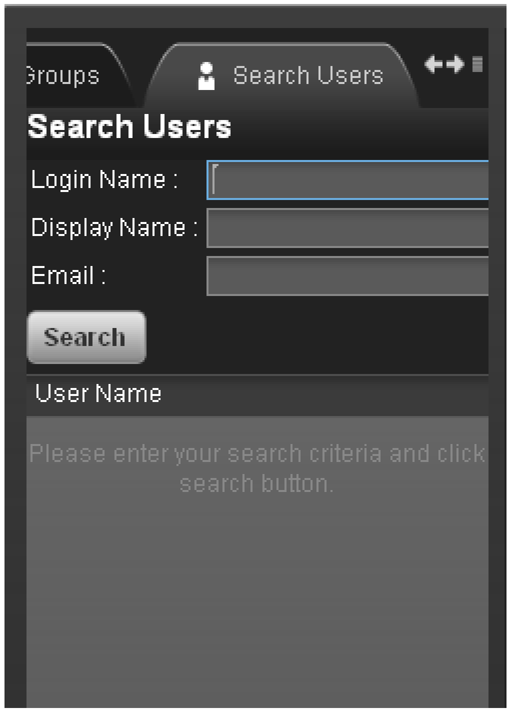
Enter the **Group Name** and **Group Description** and click **OK**.
</td></tr>
<tr><td></td><td>**Attach to group**. Attaches the selected user or group</td></tr>
</table>

UI Element	Description
	to a group. The users or groups inherit all of the group's roles.  Select the group and click **OK**.
	**Delete**. Deletes the selected user or group. When a group is deleted, its users still exist under a system group called Everyone.
	**Detach from group**. Detaches the selected user or group from a group. When you detach a user/group from a group, they no longer have the roles that they inherited from the group. **Note:** When you detach a group from a group, it moves to the "root" of the groups and users tree.

Search Users Tab

User interface elements are described below (unlabeled elements are shown in angle brackets):

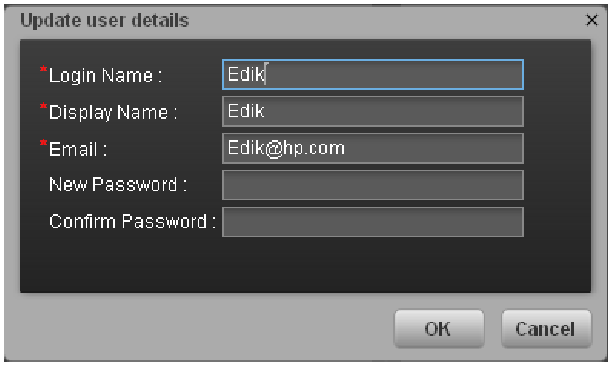
UI Element	Description
Search Users	The search criteria.

UI Element	Description
	 To search for users, enter some or all of the user details: **Login Name, Display Name, Email**. **Note:** For better search capabilities, use regular expression, for example *<FirstName>*.
Search	**Search**. Click to search for users that match the criteria entered in the **Search Users** tab.
User Name	A list of all users that match the search criteria.

User Details Pane

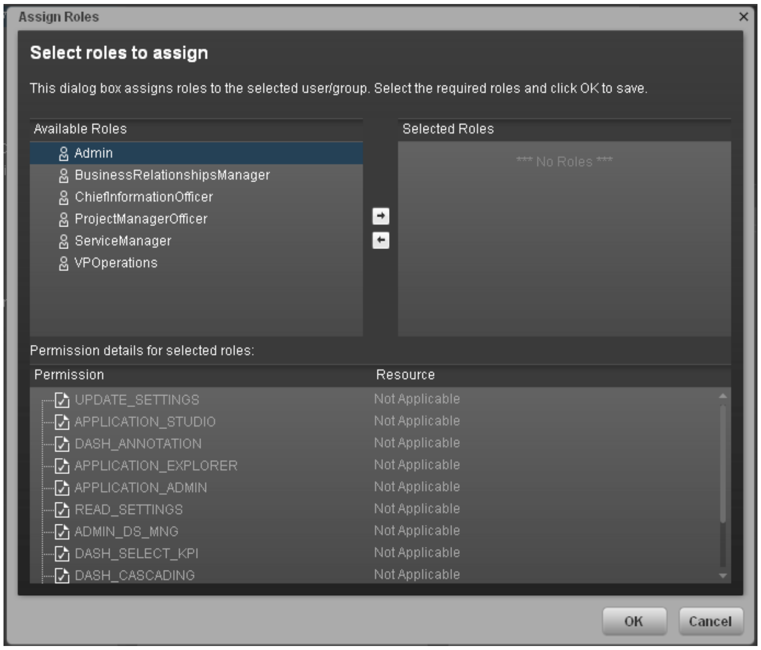
User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
User/Group Name	The name of the selected user or group.
User/Group Description	The description of the selected user or group.
Edit Details	Edits the selected user or group details. Enables you to change a user password.

UI Element	Description
	
Roles and Permissions list	The assigned roles and corresponding permissions and environments for the selected user or group.
	**Assign role**. Opens the Assign Roles dialog box that enables you to assign a role to the selected user or group. For details, see "Assign Roles Dialog Box " (on page 32).
	**Remove role**. Removes the selected role from the user or group.
Role name	The role assigned to the selected user or group.
Permission	The permission corresponding to the selected user or group.
Resource	The resource attached to the permission of the selected user or group. For details, see "Resource Management Page" (on page 44).

Assign Roles Dialog Box

This dialog box enables you to assign roles to users or groups.



To access	Select **Admin** > **Users and Roles** > **User Management**, select a user or group, and click **Assign Roles**  in the Roles and Permissions area.
Important information	Actions users can access depend on their roles and permissions.
Relevant tasks	"How to Assign Roles to Users" (on page 24)

User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
	Select a role from the **Available Roles** list and use the arrows to move the role to the **Selected Roles** list.
Available and Selected Roles	Each user or group can have one or more assigned roles.
Permission details	The read-only details about the permissions and corresponding resources for the selected role.
Resource	The list of resources for each permission. **Not Applicable:** Used for permissions that do not require a specific resource setting. **<Resource Name>:** The permission is attached to a specific resource.

UI Element	Description
	All: The permission is applicable to all resources.

Manage Roles

The Role Management page enables you to edit role details as well as attach and manage permissions, according to the following tasks:

"How to Create or Delete a Role" (on page 33)

"How to Edit Role Details" (on page 33)

"How to Attach and Manage Permissions" (on page 34)

For user interface details, see " Role Management Page " (on page 35) .

How to Create or Delete a Role

The Role Management page enables you to create a new role or delete an existing role.

To create a role:

1. Select **Admin** > **Users and Roles** > **Role Management**.
2. Click  to create a new role.
3. Enter the name and description for the role.
4. Click **OK** to save your role.

After creating a role, follow the procedure for attaching permissions and resources.

For details, see "How to Attach and Manage Permissions" (on page 34)

To delete a role:

1. Select **Admin** > **Users and Roles** > **Role Management**.
2. Select a role from the list.
3. Click  to delete the role from the list.

For details, see " Role Management Page " (on page 35).

How to Edit Role Details

The Role Management page enables you to edit role details.

To edit role details:

1. Select **Admin** > **Users and Roles** > **Role Management**.
2. Select a role from the **Roles** area and click **Edit Details** in the **Role Details** area.
3. Edit the role as required and click **OK**.

For details, see " Role Management Page " (on page 35).

How to Attach and Manage Permissions

The Role Management page enables you to attach permissions to roles, as well as attach resources to permissions.

To attach and manage permissions

1. Select **Admin** > **Users and Roles** > **Role Management**.
2. Select a role and click in the **Role Details** pane. The Assign Permission to Role wizard opens.
3. Select a permission from the list.
4. Attach a resource to the selected permission.
5. Complete the wizard procedure to save your assignments.

For details see" Assign Permission to Role Wizard " (on page 37).

To add a resource to a permission:

1. Select **Admin** > **Users and Roles** > **Role Management**.
2. Click to open the **Assign Resources to Permissions** page in the **Assign Permission to Role** wizard.
3. Select a permission and use the arrows to move the required environments from the **Available Resources** list to the **Selected Resources** list.

For details, see " Role Management Page " (on page 35).

Role Management

The Role Management page enables you to add specific permissions to a role, as well as attach resources to the permissions.

Roles and Permissions

Each role is associated with permissions. Permissions define which actions can be performed by the user with a specific role. For example, you can create a role that enables its users to create specific pages. In some cases, actions can be performed according to the resource attached to a permission.

Note: Users that are created in the Admin tab and require permissions to view reports pages, must be assigned those permissions in SAP BusinessObjects Enterprise for IT Executive Scorecard.

Resources

A resource is a logical group of one or more pages. Once you define resources, you attach the resources to a permission. For example, you can specify that the CIO has View permissions for CIO resources, while the Admin has View permissions for all resources.

Role Management UI TOC

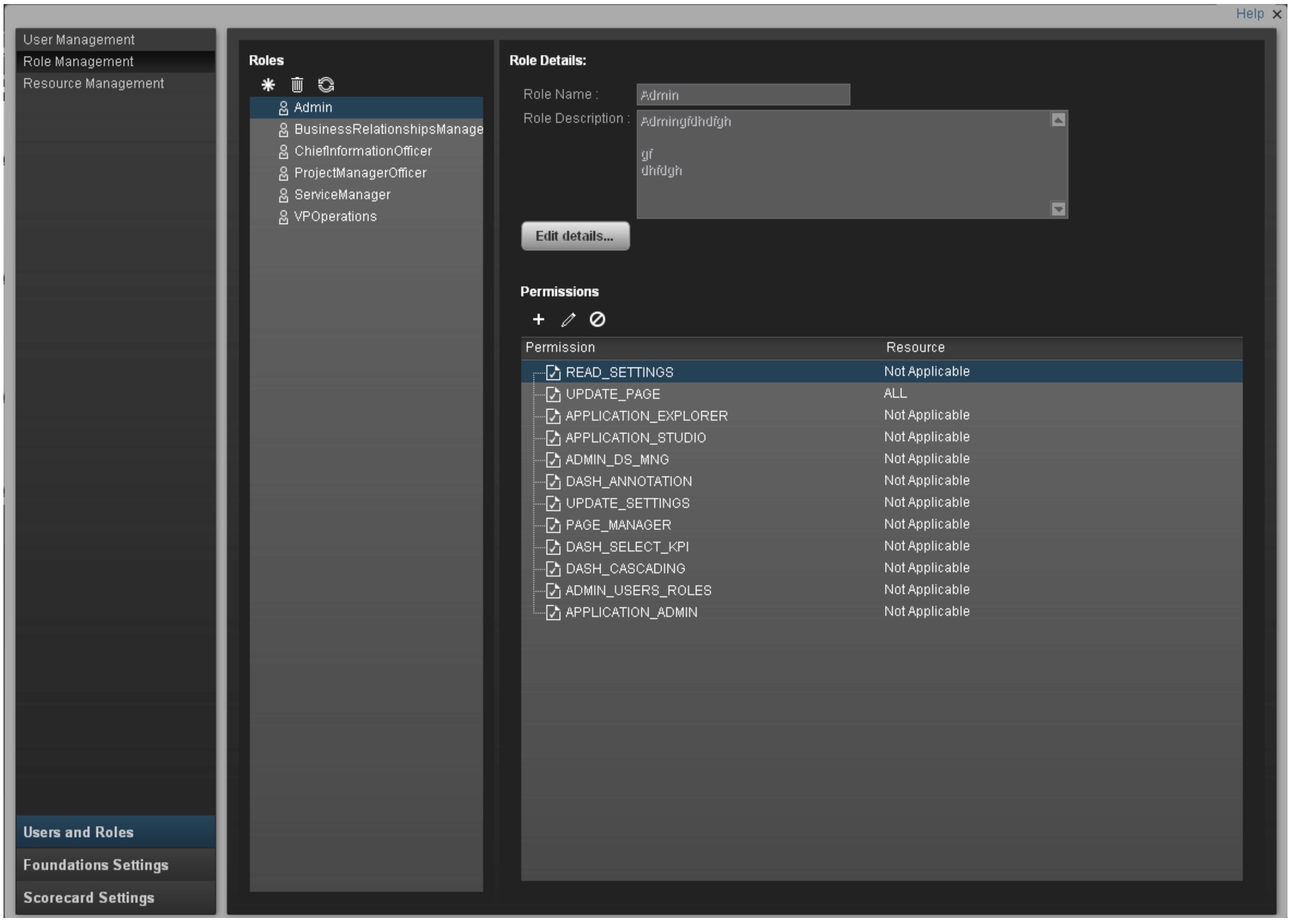
Role Management includes following UI topics:

[" Role Management Page " (on page 35)]

[" Assign Permission to Role Wizard " (on page 37)]

Role Management Page

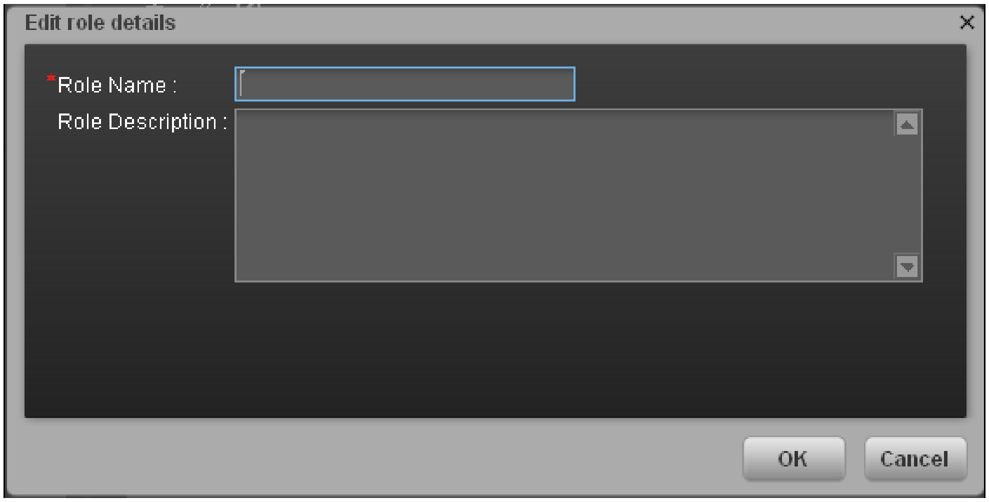
This page enables you to define the user roles and application permissions in the Admin tab. You can also assign resources to specific permissions.



To access	Select **Admin** > **Users and Roles** > **Role Management**.
Important information	It is recommended to define resources prior to defining roles. For details, see "Resource Management Page" (on page 44). Click **Refresh**  to refresh the display.
Relevant tasks	"Manage Roles" (on page 33)

Roles Pane

User interface elements are described below (unlabeled elements are shown in angle brackets):

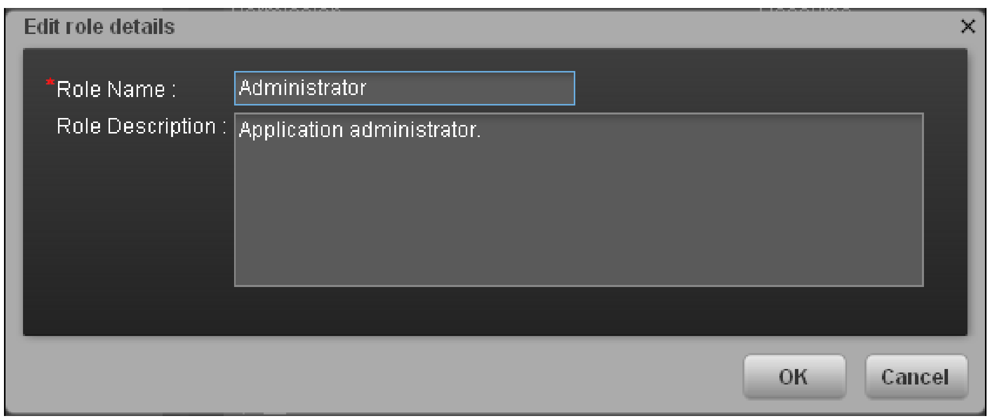
<table>
<tr><th>UI Element</th><th>Description</th></tr>
<tr><td></td><td> Create Role. Creates a new role.


Enter the Role Name and Role Description and click OK. </td></tr>
<tr><td></td><td>Delete Role. Deletes the selected role.</td></tr>
<tr><td><Role List></td><td> A list of roles currently defined in the Admin tab. When you select a role, the details appear in the Role Details pane and Permissions list.
Available Roles:

Administrator. The application administrator.
Business Relationship Manager. Responsible for liaising between IT and the business.
Chief Information Officer. Responsible for the information technology and computer systems that support enterprise goals. A CIO is usually a key contributor in formulating strategic goals.
Project Manager Officer. Defines and maintains the standards of process, generally related to project management, within the organization.
Service Manager. Responsible for the definition of the processes within the organization as well as the implementation and execution of those processes.
VP Operations. Responsible for maintaining the uptime and performance of all business services within the enterprise.
</td></tr>
</table>

Role Details Pane

User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
	**Attach permission.** Assigns selected permissions to roles. You select permissions using the **Assign Permission to Role** wizard. For user interface details, see" Assign Permission to Role Wizard " (on page 37).
	**Detach permission.** Removes the selected permission from the role.
	**Manage permission.** Modifies the selected permission. Opens the **Assign Resources to Permissions** page in the **Assign Permission to Role** wizard. For user interface details, see " Assign Resources to Permissions Page " (on page 41).
Role Name	The name of the selected role.
Role Description	The description of the selected role.
Edit Details	Edits the selected role name and description. 
Permissions List	The list of permissions and resources for the selected role.
Permission	The permission sets and permissions attached to the selected role.
Resources	The list of resources for each permission. **Not Applicable.** Used for permissions that do not require a specific resource setting. **<Resource Name>.** The permission is attached to a specific resource. **All.** The permission is applicable to all resources.

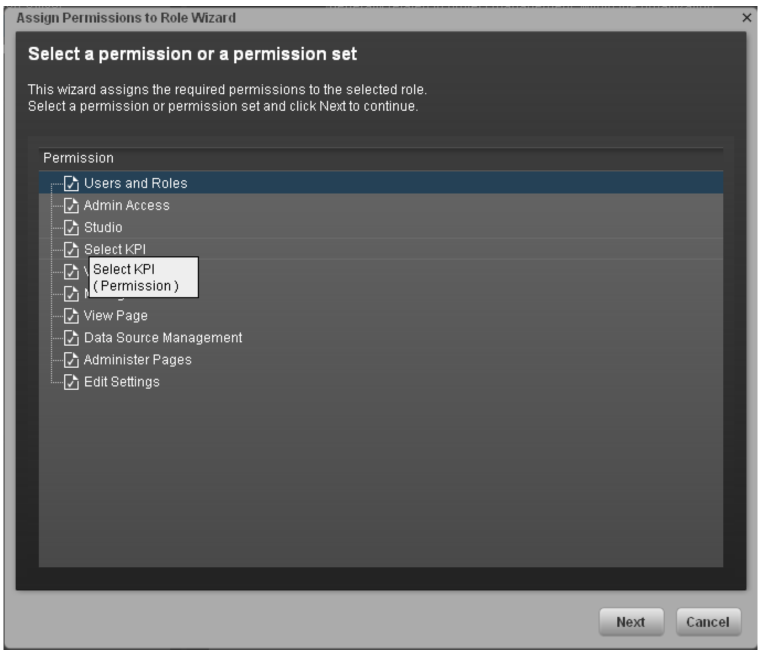
Assign Permission to Role Wizard

This wizard enables you to assign permissions to the selected role, as well as assign environments to the permissions.

To access	Select **Admin** > **Users and Roles** > **Role Management**. Select a role and click + in the **Role Details** pane.
Wizard Map	The Assign Permission to Role wizard contains: " Select a Permission Page " (on page 38) >" Assign Resources to Permissions Page " (on page 41)" Confirmation Page " (on page 41)
Relevant tasks	"How to Attach and Manage Permissions" (on page 34)

Select a Permission Page

This wizard page enables you to select the permissions to assign to a role.



Important Information	Select a permission from the tree. This page may lead directly to the Confirmation page depending on whether the selected permission has resources attached.
Wizard Map	The" Assign Permission to Role Wizard " (on page 37) contains: " Select a Permission or Permission Set Page " >" Assign Resources to Permissions Page " (on page 41)" Confirmation Page " (on page 41).

User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
<Permissions tree>	Displays the pre-defined permissions. For details, see "Pre-Defined Permissions" (on page 38).

Pre-Defined Permissions

- **Explorer Access.** Enables the user to access the Explorer tab.
  Note: Users with the**Explorer Access** permission should also have the **Select KPI** permission. The user then gets access to all KPIs in the Explorer page by clicking the **Explorer** button.
- **View Settings.** Enables the user to view the Scorecard Settings, Foundation Settings, and Data Warehouse Settings accordion tabs.
- **Users and Roles.** Enables the user to view the Users & Roles accordion tab. To modify the contents of the Users & Roles accordion tab, the user needs the **Edit Settings** permission. Must have **Admin Access** to view the Admin tab.
- **Admin Access.** Enables the user to access the Admin tab, but not any further pages.
- **Studio.** Enables the user to view the Studio tab and to modify its contents.
- **Manage Page.** Enables the user to view, modify (add components, delete components, and even delete) the relevant page in the Dashboard. Note that when an additional page is needed a user with this permission must ask a user with the Administer Pages permission to create the new page. Once the page is created and assigned to a user, the user can add components, and modify it.
- **Select KPI.** Enables the user to view the contents of the Active KPIs area in all the components filters. The user can also move KPIs from the Active KPIs area to the Selected KPIs area.
  If the user does not have this permission, the user can, in all the component filters, view the contents of the Selected KPIs area, cannot modify the selection, and cannot view the contents of the Active KPIs area as the contents are greyed out.
- **View Page.** Enables the user to only view the relevant page in the Dashboard.
- **Manage Annotation.** Enables the user to edit or delete an existing annotation. If the user does not have this permission, the user can only view the annotation and the **Edit** and **Delete** buttons of the annotation are hidden.
- **Data Source Management.** Enables the user to access the Data Source Management page and activate content packs. Must have **Admin Access** to view the Admin tab.
- **Edit Settings.** Enables the user to edit the contents of the Scorecard Settings, Foundation Settings, and Data Warehouse Settings accordion tabs.Must have **Admin Access** to view the Admin tab.
- **Administer Pages.** Enables the user to view and modify (add components, delete components, and even delete) all the pages in the Dashboard. The user can also create new pages.
- **Cascade Scorecard.** Enables the user to view the small black arrow (near the Scorecard title) that indicates that the Scorecard has Cascading Scorecards. The user can click the arrow to display the Cascading Scorecards for which he has permission.
  If the user does not have this permission, the small arrow is not displayed and the user does not know that Cascading Scorecards are available.

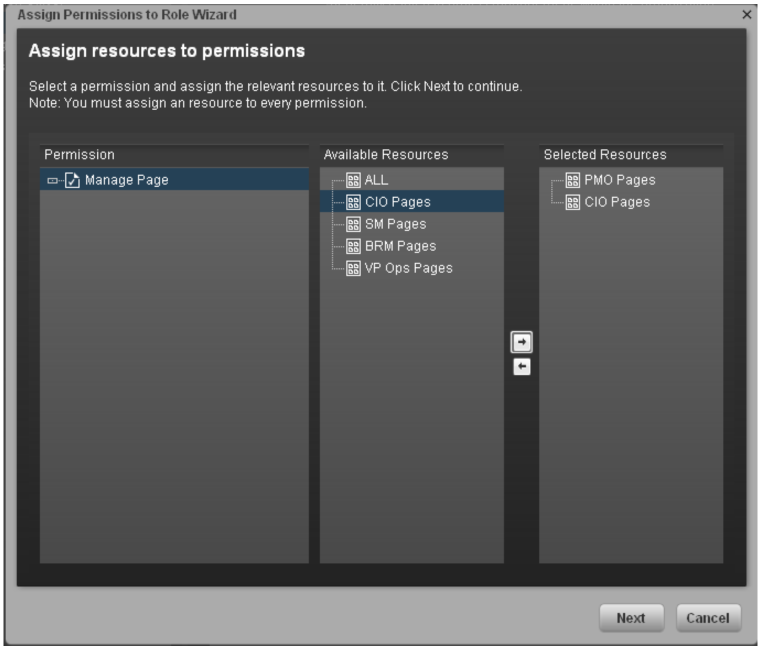
Notes:

- Users with the **Administrate Pages** permission can add pages and control all pages in the system but they need the **Select KPI** permission to configure components on the page.
- Users with the **Manage Page** permission can change and delete specific pages but cannot create new pages. To do that they need the **Administrate pages** permission.

- The out-of-the-box roles (for example: CIO) have the Manage Page permission for the relevant page, as well as **Explorer Access** and **Cascade Scorecard** permissions.

Assign Resources to Permissions Page

This wizard page enables you to assign resources to permissions.



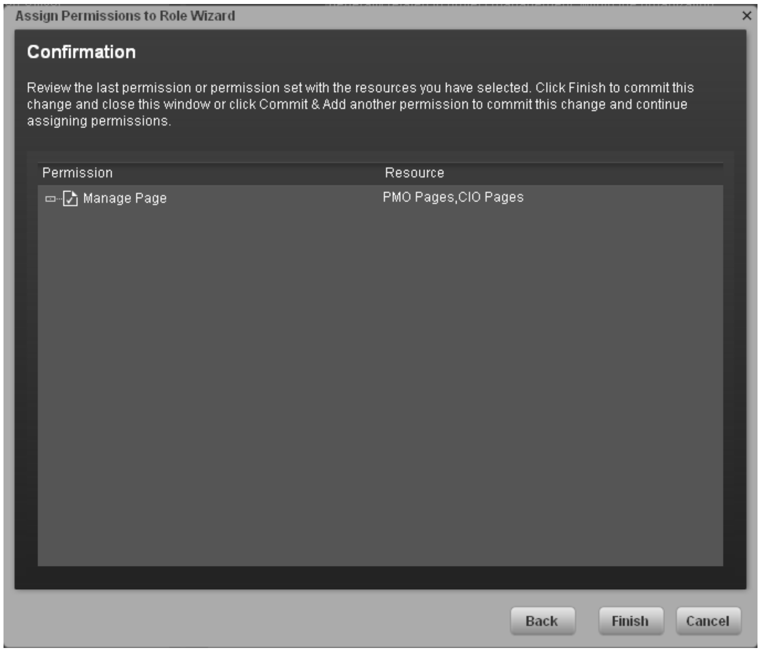
Important Information	This page only appears if the permissions are applicable for a resource. **Note:** Click  to access this page directly.
Wizard Map	The " Assign Permission to Role Wizard " (on page 37) contains: " Select a Permission Page " (on page 38) >" Assign Resources to Permissions Page " (on page 41) > " Confirmation Page " (on page 41).

User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
Permission	A tree containing the permissions.
	Select a permission and use the arrows to move the required resources from the **Available Resources** list to the **Selected Resources** list.
Available and Selected Resources	Each permission can be applicable for specific resources, for all resources, or not applicable to a resource.

Confirmation Page

This wizard page confirms the permissions assignments you have made.



Wizard Map	The " Assign Permission to Role Wizard " (on page 37) contains: " Select a Permission Page " (on page 38) " Assign Resources to Permissions Page " (on page 41) > " Confirmation Page " (on page 1).

User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
Permission	The permissions assigned to this role.
Resource	The list of resources associated with the each permission.
Add another	Click to commit the current permission and continue in the wizard to add another permission. The " Select a Permission Page " (on page 38) opens.
Finish	Click to commit the assigned permissions and finish wizard functions.
Cancel	Click to cancel the current assignment. All previous actions in the wizard are still valid.

Manage Resources

The **Resource Management** page enables you to view resource and resource types, as well as create a resource. You can also select instances or pages that comprise a resource. The Resource Management page includes the following tasks:

"How to Create a Resource" (on page 42)

"How to Select and Manage Instances" (on page 43)

For details see "Resource Management Page" (on page 44).

How to Create a Resource

The Resource Management page enables you to create a resource to attach to permissions.

To create a resource:

1. Select **Admin** > **Users and Roles** > **Resource Management**.
2. In the **Resources** area, click **Create resource** ✱ to create a new resource.
3. Enter the **Resource** and **Details**.
4. Click **OK** to save your new resource.

For details see "Resource Management " (on page 43).

How to Select and Manage Instances

The Resource Management page enables you to select and attach instances that comprise resources.

To manage instances:

1. Select **Admin** > **Users and Roles** > **Resource Management**.
2. Select a page in the **Resources** area.
3. In the **Instances** area of the **Resource Details** pane click **Add instances** + to open the Manage Instances dialog box. Instances are the available pages defined in the system that are attached to resources.
4. Select the instance from the **Available Instances** list and use the arrows to move the instance to the **Selected Instances** list.
5. Click **OK** to save your changes.

For details see "Manage Instances Dialog Box" (on page 47).

Resource Management

The Resource Management page enables you to view resources as well as create new resources. You can also add instances to specific resources .

Resources

A resource is a logical group of one or more pages. Once you define resources, you attach the resource to a permission.

Instances

An instance is a page that can be managed by a user according to the user's permissions.

Note: Users that are created in the Admin tab and require permissions to view reports pages must be assigned those permissions in SAP BusinessObjects Enterprise for IT Executive Scorecard.

Resource Management UI TOC

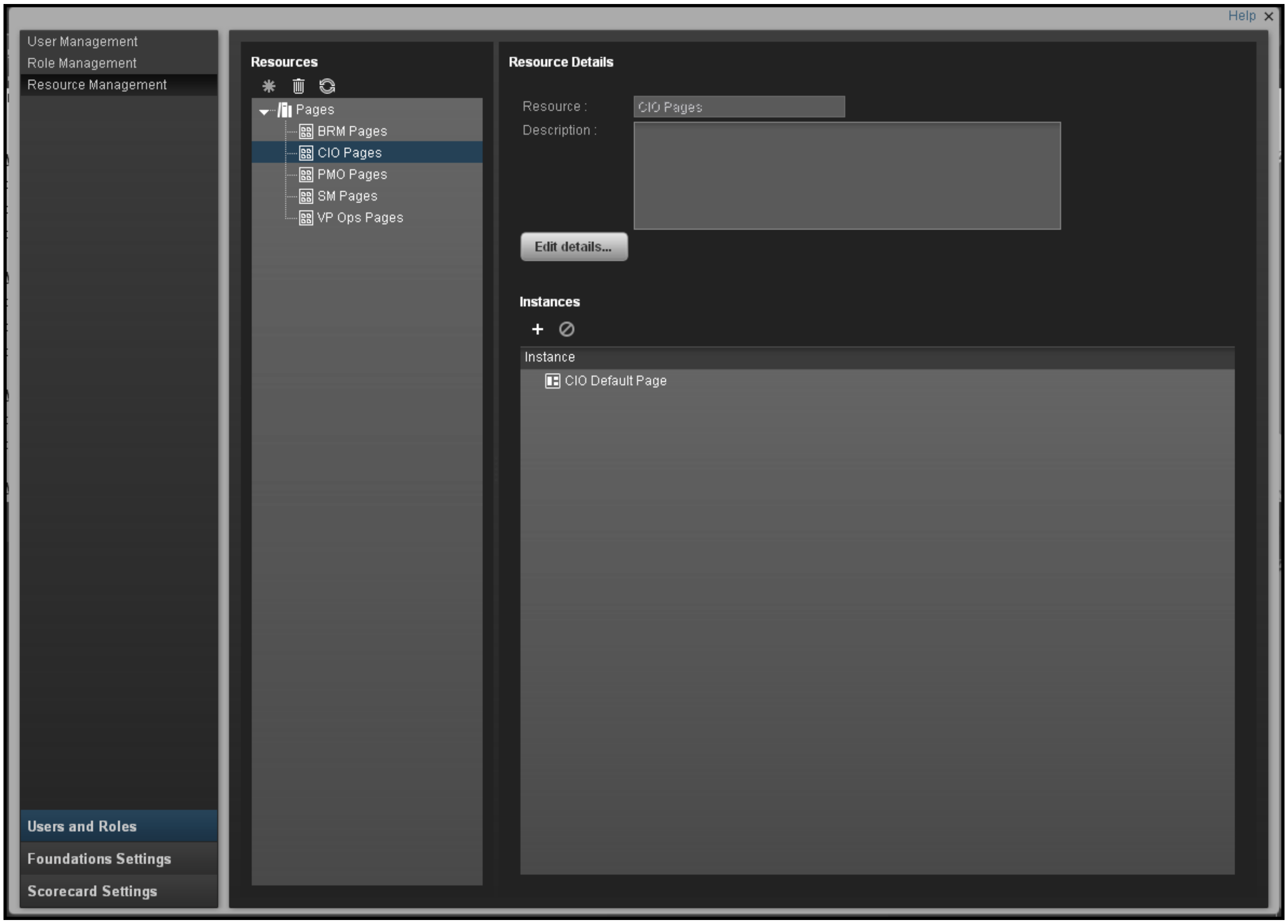
Resource Management includes the following UI topics:

"Resource Management Page" (on page 44)

"Manage Instances Dialog Box" (on page 47)

Resource Management Page

This page enables you to define working resources that contain views or pages available to users with specific permissions.

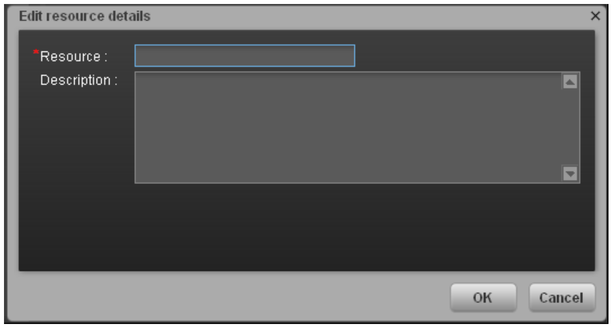


To access	Select **Admin** > **Users and Roles** > **Resource Management**.
Important information	Resources are the basis for user and role management. For each user or group, you assign permissions to perform specific actions on specific resources. Click **Refresh**  to refresh the display.
Relevant tasks	"Manage Resources" (on page 42)

Resources Pane

User interface elements are described below (unlabeled elements are shown in angle brackets):

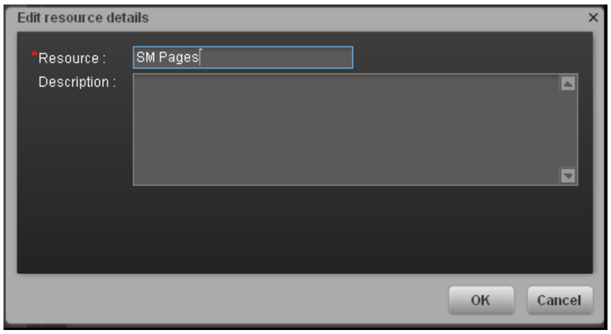
UI Element	Description
	Select a resource and click **Create Resource** to open the Edit resource details dialog box and create a new resource of that type.

UI Element	Description
	
	**Delete Resource.** Deletes the selected resource. **Note:** If the resource is the only resource attached to a permission and that permission is attached to any roles, deleting the resource detaches the corresponding permissions from these roles.
<Resources Tree>	Contains the resource types and the resources defined for each type. **Available Resources:** • **BRM Pages.** The pages that provide the relevant information and tools for the Business Relationships Manager (BRM) who is responsible for liaising between IT and the business. • **CIO Pages.** The pages that provide the relevant information and tools for the Chief Information Officer (CIO) who is responsible for the information technology and computer systems that support enterprise goals. • **PMO Pages.** The pages that provide the relevant information and tools for the Project Management Officer (PMO), who runs specific company projects. • **SM Pages.** The pages that provide the relevant information and tools for the director of Service Management who is responsible for the definition of the processes within the organization as well as the implementation and execution of those processes. • **VP Ops Pages.** The pages that provide the relevant information and tools for the VP of Operations who maintains the uptime and performance of all business services within the enterprise.

Resource Details Pane

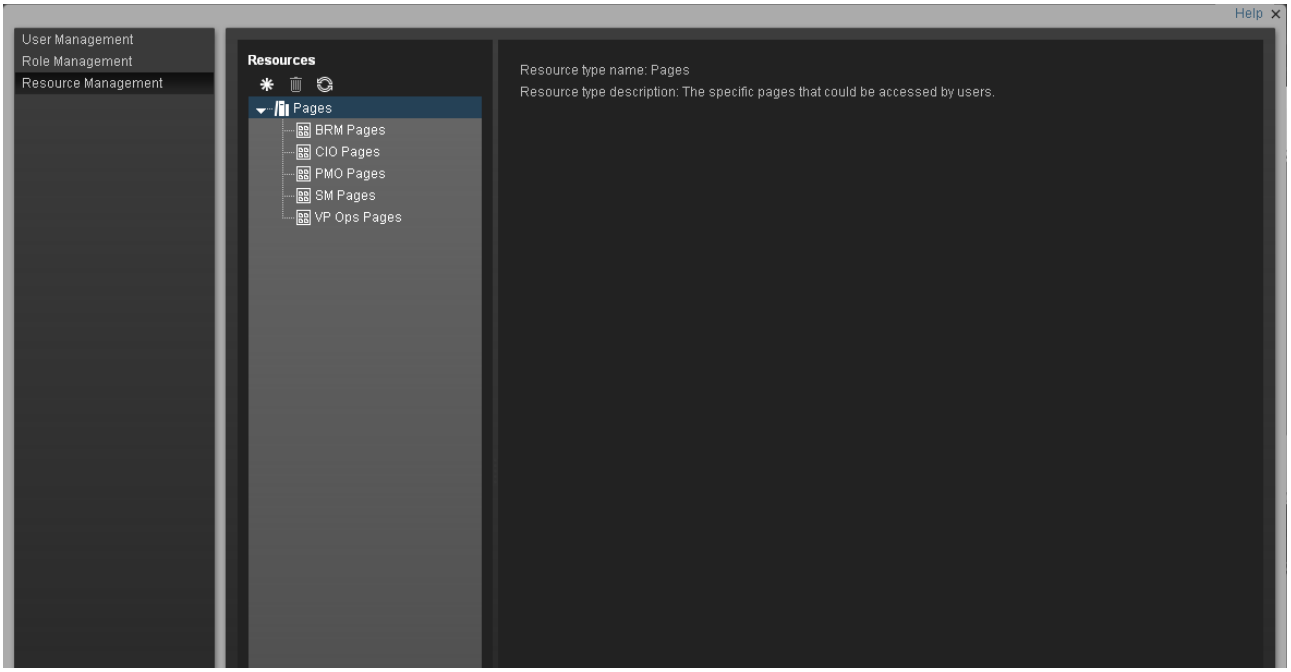
When you select a resource in the **Resources** pane, the details appear in this pane.
User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
	**Add Instances.** Adds pages to the selected resource. Opens the Manage Instances dialog box. Each resource can have one or more assigned page instances.

UI Element	Description
	In the Manage Instances dialog box, select a page instance from the **Available Instances** list and use the arrows to move the instance to the **Selected Instances** list. For details, see "Manage Instances Dialog Box" (on page 47). **Note:** These instances are the available pages defined in the system.
	**Remove Instances.** Removes the selected instance from the resource.
Edit Details	Edits the selected resource name and description. 
Resource Description	The description of the selected resource.
Resource Name	The name of the selected resource.
Instances	List of page instances for the selected resource.

Resource Type Details Pane

When you select a resource in the resources pane, the details appear in this pane.

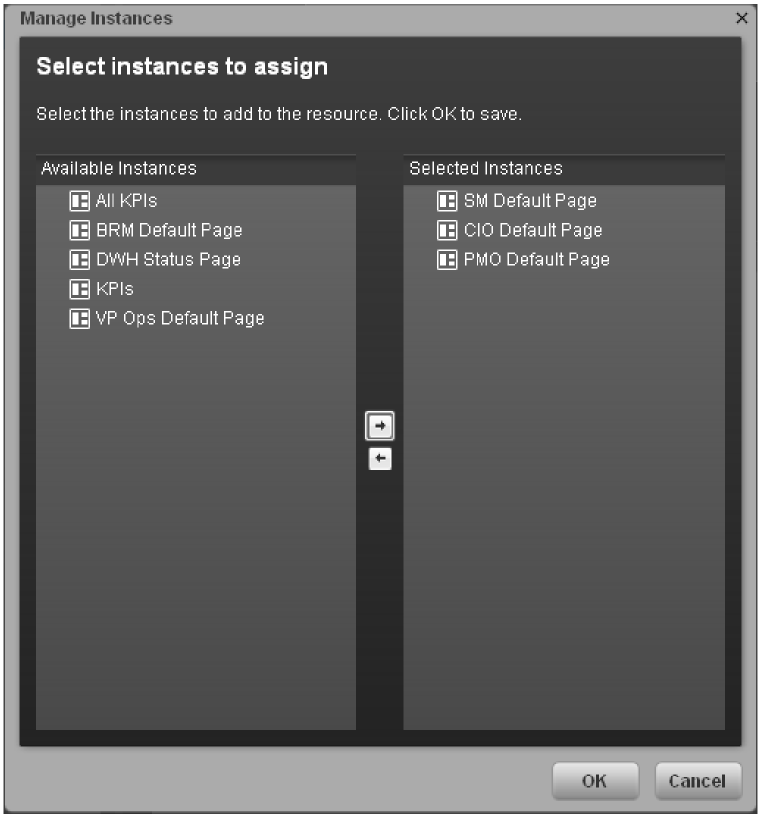


User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
Resource Type Description	The description of the selected resource type.
Resource Type	The selected resource type.

Manage Instances Dialog Box

This dialog box enables you to attach pages to a resource.



To access	Select **Admin** > **User Management** > **Resource Management**. Select a page and click the **Add instances** button in the Resource Details pane.
Important information	Actions users can access depend on their roles and permissions. Instances are the available pages defined in the system.
Relevant tasks	"How to Select and Manage Instances" (on page 43)

User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
 	Select an instance from the **Available Instances** list and use the arrows to move the instance to the **Selected Instances** list.
Available and Selected Instances	Each resource can have one or more assigned instances.

Manage Foundation Settings

Foundation Settings enables you to define various system settings for the administration of the product. The Foundations Settings includes the following pages:

- **"Business Objects Page" (on page 49).** Enables you to configure the name of an Administrator-type user that can help the performance by running queries to SAP BusinessObjects Enterprise for IT Executive Scorecard.
- **"Website Page" (on page 50).** Enables you to set the ping time interval.
- **"Pages Settings Page" (on page 52).** Enables you to configure page settings.
- **"Single Sign-On Page" (on page 54).** Enables you to define SSO parameters.

This section includes the following topics:

How to Define Business Objects Settings

The Business Objects page enables you to configure the name of an Administrator-type user that can help the performance by running queries to the SAP BusinessObjects Enterprise for IT Executive Scorecard, according to the following task.

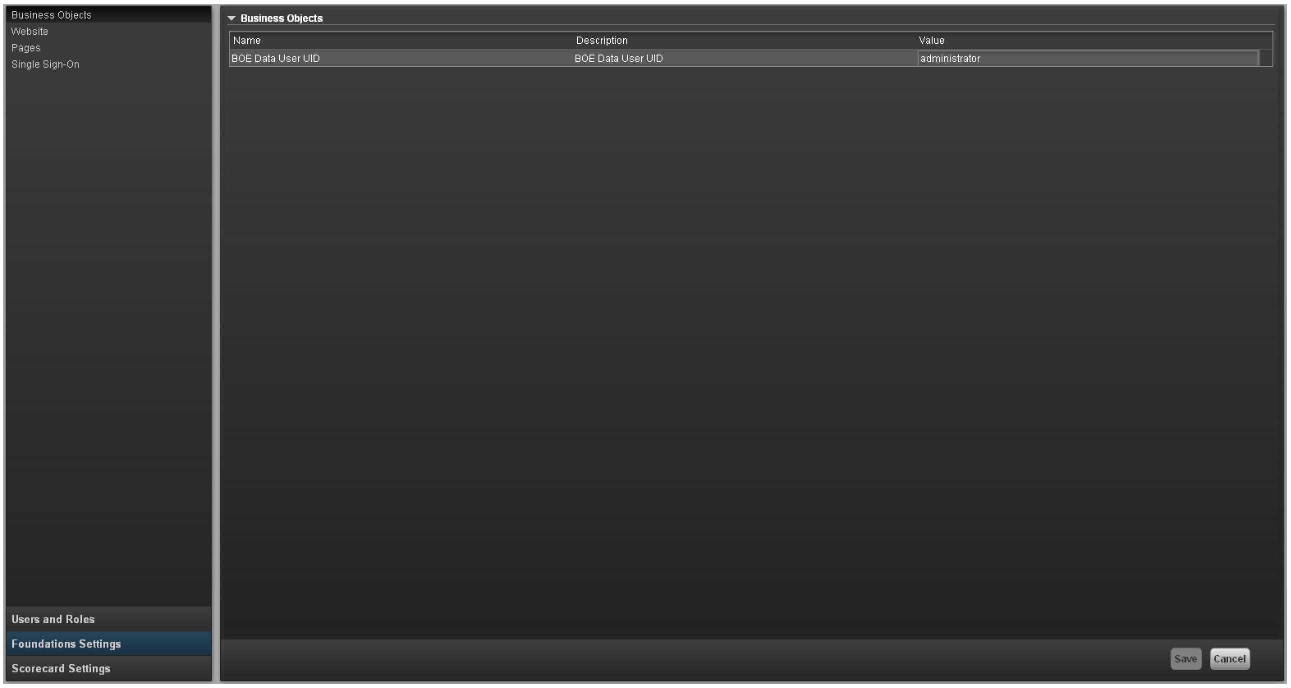
To set the SAP BusinessObjects Enterprise for IT Executive Scorecard administrator name:

1. Select **Admin** > **Foundation Settings** > **Business Objects**.
2. Enter another user in the **Value** field of the **BOE Data User UID** parameter. For details, see "SAP BusinessObjects Enterprise for IT Executive Scorecard User" (on page 22).
3. To change the name of the user, select **Admin > Users and Roles > User Management**. For details, see "Add and Edit Users" (on page 1).
4. Click **Save** to save your settings.

For details see "Business Objects Page" (on page 49).

Business Objects Page

This page enables you to configure the name of an Administrator-type user that can help the performance by running queries to the SAP BusinessObjects Enterprise for IT Executive Scorecard. For details on the user, see "SAP BusinessObjects Enterprise for IT Executive Scorecard User" (on page 22).



To access	Select **Admin** > **Foundations Settings** > **Business Objects**.
Relevant Tasks	"How to Define Business Objects Settings" (on page 49)

Business Objects Table

UI Element	Description
BOE Data User UID	The name of the SAP BusinessObjects Enterprise for IT Executive Scorecard user.

How to Define Website Settings

The Website page enables you to configure ping time intervals for refreshing the browser automatically, according to the following task.

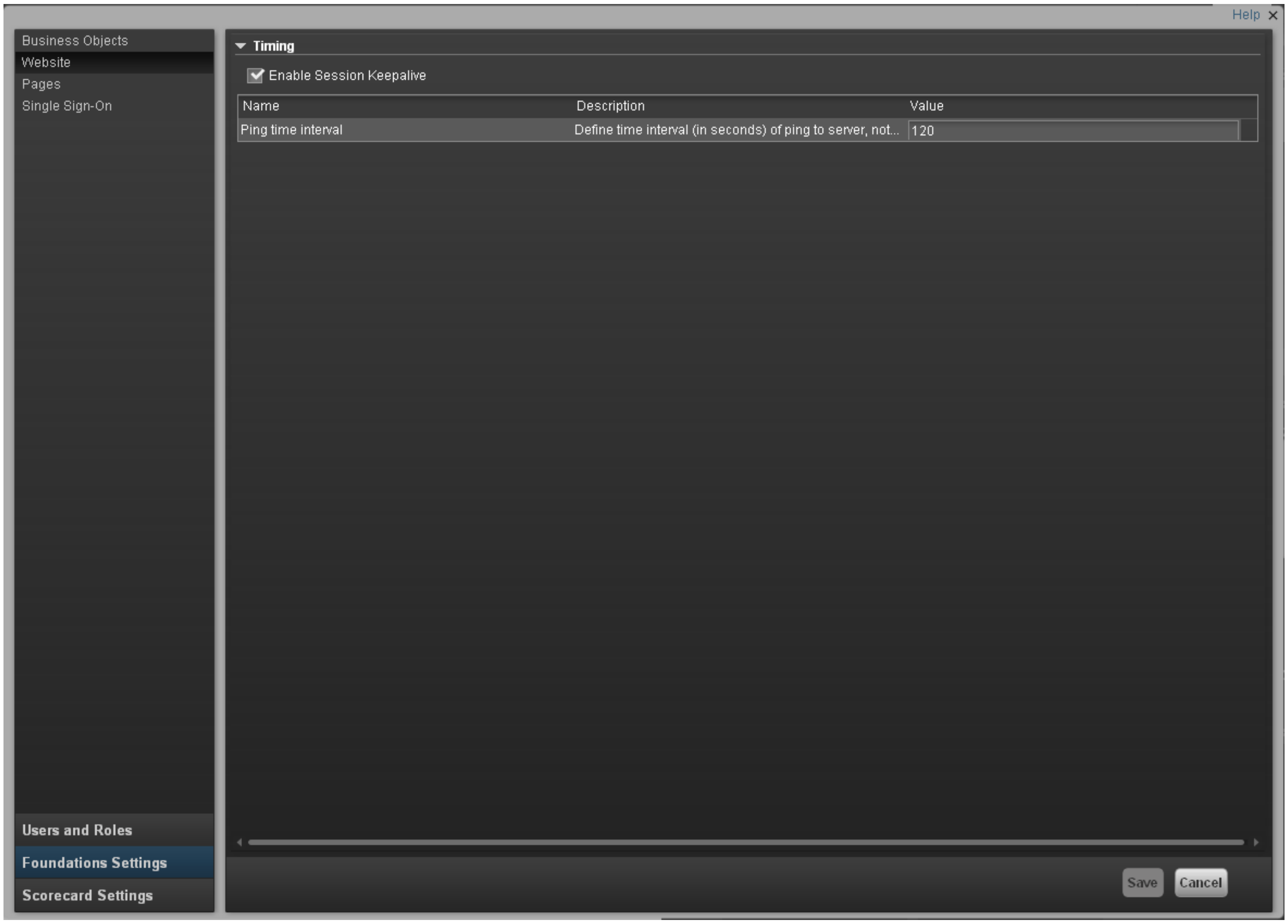
To set the ping interval:

1. Select **Admin > Foundation Settings > Website**.
2. Select the check box to enable the ping feature.
3. Click the **Ping timeinterval** row and enter the required time in seconds.
4. Click **Save** to save your settings.

For details see "Website Page" (on page 50) .

Website Page

This page enables you to configure the Website settings.



To access	Select **Admin** > **Foundations Settings** > **Website**.
Important information	Select the check box to enable ping configuration. De-select the check box to disable the ping feature. The browser will then time out.
Relevant Tasks	"How to Define Website Settings" (on page 50)

Timing Table

UI Element	Description
Name	The name of the Website feature.
Description	The description of the Website feature.
Value	The current Website feature value in seconds. Click the relevant row and enter a value.

Timing Parameters

User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
Enable Session Keepalive	Select to enable the ping feature.
Ping time interval	The amount of time between browser refresh. This ensures that the application does not time out. **Note:** Changes will only take effect in the next login.

How to Define Pages Settings

The Pages settings page enables you to configure page settings in the Executive Scorecard, according to the following task.

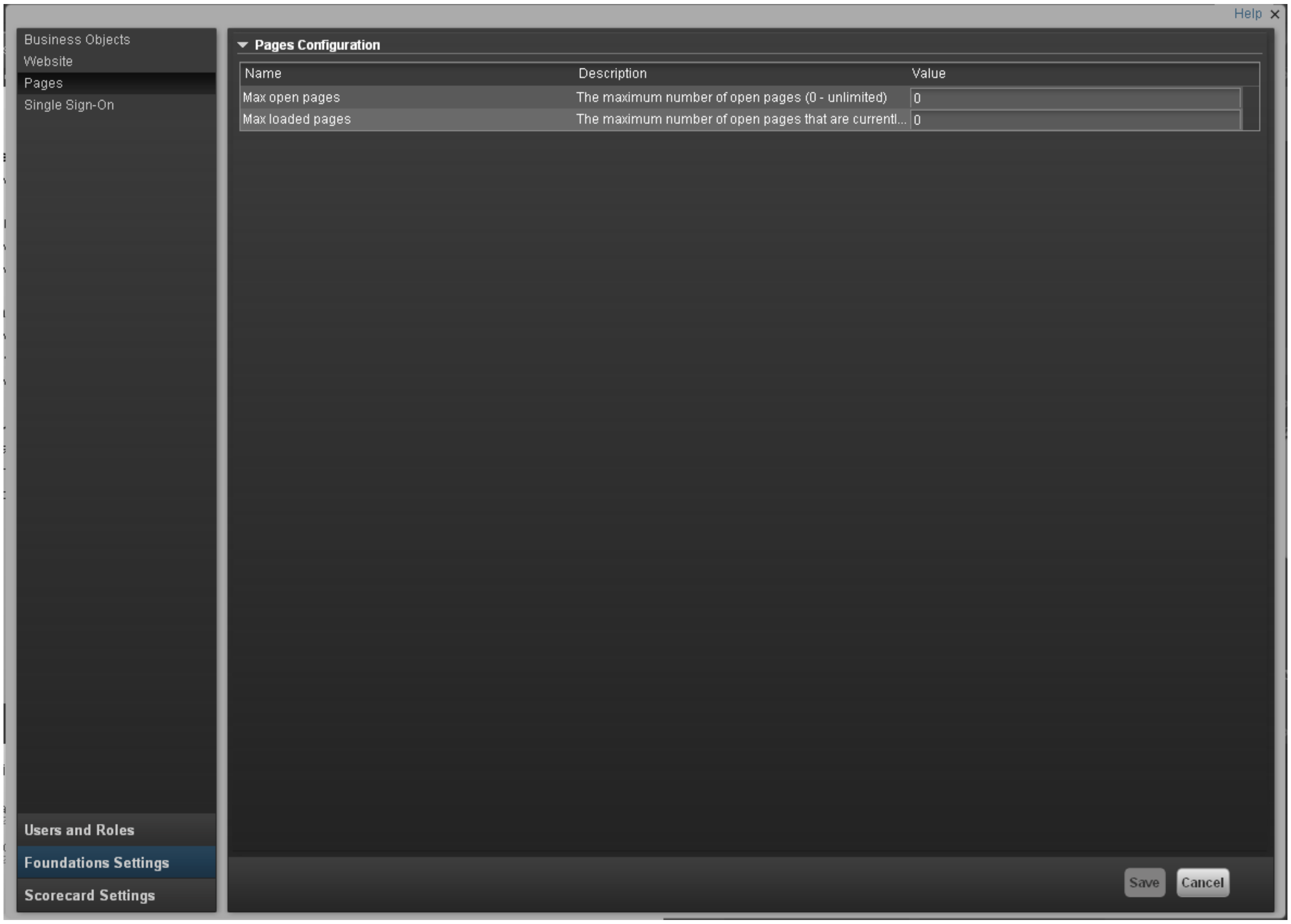
To configure the page settings:

1. Select **Admin** > **Foundation Settings** > **Pages**.
2. Click the relevant row and enter the required setting.
3. Click **Save** to save your settings.

For details see "Pages Settings Page" (on page 52).

Pages Settings Page

This page enables you to configure the Pages settings.



To access	Select **Admin** > **Foundations Settings** > **Pages**.
Relevant Tasks	"How to Define Pages Settings" (on page 52)

Pages Configuration Table

UI Element	Description
Name	The name of the page feature.
Description	The description of the page feature.
Value	The current page feature value. Click the relevant row and enter a value.

Pages Configuration Parameters

User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
Max open	The maximum number of open pages in Executive Scorecard. The options are

UI Element	Description
pages	0 - unlimited.
Max loaded Pages	The maximum number of open pages that are currently loaded in Executive Scorecard. The options are any valid number or 0 for unlimited.

How to Define Single Sign-On Settings

The **Single Sign-On** page enables you to configure SSO requirements according to the following tasks.

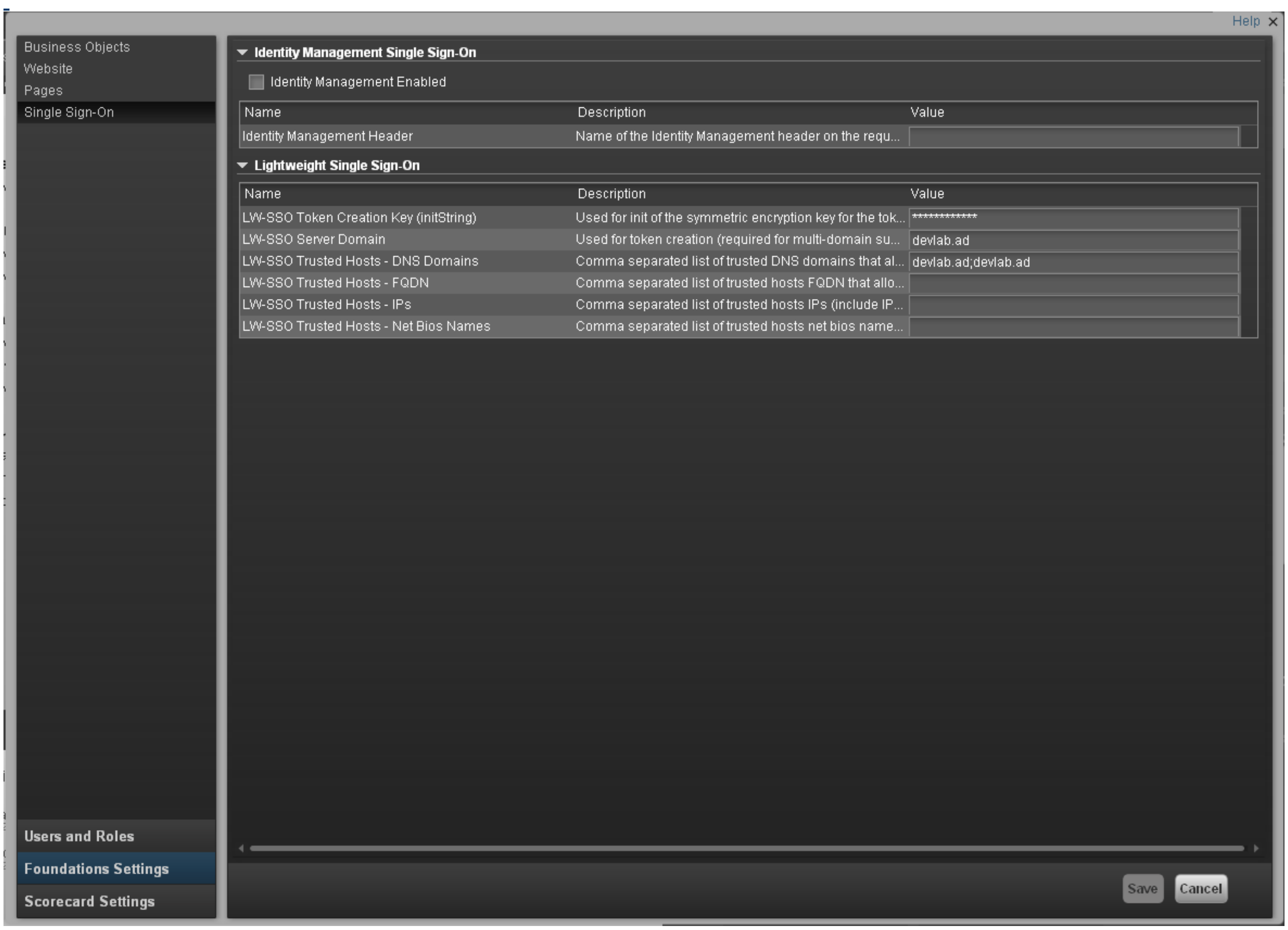
To add of change SSO values:

1. Select **Admin** > **Foundation Settings** > **Single Sign-On**.
2. Click the relevant field in the **Value** column and enter the value.
3. Click **Save** to save your settings.

For details see "Single Sign-On Page" (on page 54).

Single Sign-On Page

This page enables you to configure the SSO settings for login of all HP products.



To access	Select **Admin** > **Foundations Settings** > **Single Sign-On**
Relevant Tasks	"How to Define Single Sign-On Settings" (on page 54) "Use the Identity Management Single Sign-On" (on page 14)

Single Sign-OnTable

UI Element	Description
Name	The name of the SSO feature.
Description	The description of the SSO feature.
Value	The current SSO feature value in seconds. Click the relevant row and enter a value.

SSO Parameters

User interface elements are described below (unlabeled elements are shown in angle brackets):

UI Element	Description
Identity Management Enabled	Select and enter the name of the IDM header (the header that contains the user login name) in the **Value** field of the **ID Management Header** setting. For details, see "Use the Identity Management Single Sign-On" (on page 14) .
LW-SSO Token Creation String (initString)	The string used as the encryption key for token creation and validation.
LW-SSO Server Domain	The domain used for token creation. This value is required in cases of multi domains.
LW-SSO Trusted Hosts - DNS Domains	The list of trusted DNS domains that allow multi-domain support (must be separated by commas).
LW-SSO Trusted Hosts - FQDN	The list of trusted hosts' FQDN that allow multi-domain support (must be separated by commas).
LW-SSO Trusted Hosts - IPs	The list of trusted hosts' IPs (including IPv6) that allow multi-domain support (must be separated by commas).
LW-SSO Trusted Hosts - NetBIOS Names	The list of trusted hosts' netBIOS names that allow multi-domain support (must be separated by commas).

Manage Scorecard Settings

Scorecard Settings enables you to define various Executive Scorecard settings.

For details, see the Configure Scorecard Settings in the *IT Executive Scorecard Admin Guide*.

Manage Data Sources

Data Source Management enables you to manage the integration of data into the data warehouse through the activation of data sources. The available data source content packs are registered in the deployment process and can then be activated in the Data Source Management page.

For details, see the Data Source Management Page in the *Data Warehouse Admin Guide* .

Manage the Data Warehouse Settings

Data Warehouse Settings enables you to define settings for the interaction with the data warehouse.

For details, see the Data Warehouse Settings Page in the *Data Warehouse Admin Guide*.

Back Up Executive Scorecard

It is critical that you backup your databases, configuration files, logs and configuration settings so that you can rebuild your IT Executive Scorecard solution and content in circumstances such as the following:

- When you need to recover from a total disaster recovery scenario.
- The RDBMS server failed but all HP Executive Scorecard component servers are fully functioning.
- When a database is corrupted.
- When a component server fails, but the RDBMS server and it's databases are intact.

The section includes the following topics:

- "What to Back Up" (on page 59)
- "General Backup Guidelines" (on page 59)

What to Back Up

HP recommends that you back up the following resources that may be used when one of the above scenarios occurs.

1. Microsoft SQL Server 2008 enterprise SP2 databases
   a. Staging database
   b. Target database
   c. SAP BusinessObjects Data Services database
   d. SAP BusinessObjects CMS database, and if necessary the Audit database.
   e. Management database
   f. Executive Scorecard database

   Note: The host and database names can be found in the Management database configured in the Executive Scorecard Configuration wizard.
2. Data Warehouse Configuration files. For more information, see Configuration Files to Backup in the *Data Warehouse Admin Guide*.
3. SAP BusinessObject Enterprise configuration. This can be backed up with the SAP BusinessObjects XI 3.1 Import Wizard. For more information, see Chapter 7 of the SAP BusinessObjects XI 3.1 Import Wizard Guide at http://help.sap.com/businessobject/product_guides/boexir31/en/xi3-1_bip_importwiz_en.pdf.
4. It is highly recommended that you keep the passwords for the Staging, Target and SAP BusinessObjects Data Services databases in a safe place for usage in disaster recovery situations.

General Backup Guidelines

It is recommended that you use the following backup and restore guidelines:

- Your database administrator should back up critical data and configuration settings on a regular basis.

  Database backups should consist of a weekly full database backups, and daily differential backups.

- Backups should be periodically verified by restoring a copy onto a test system.
- External source files and Data Warehouse configuration files should be backed up as required.
- Although out of scope for this document, regular backups should be taken of all source file databases.
- Start scheduled backups before running the daily ETLs.
- Use backup compression.
- Perform full backups in off-peak times.

Perform Recovery

This section is a reference for the IT Executive Scorecard recovery process. The recovery process for your environment may vary according to your business needs and may require customization. Verify that the following processes are consistent with your architecture and environment before you proceed with real data.

When you start the recovery process, you must have complete backups of the relevant databases, configuration files and settings that are readily available. It is possible that you will lose history data.

These following scenarios are independent from the external data sources and entities. Recovering from a scenario means that the component returns to a stable state.

This section includes the following recovery scenarios:

- "The RDBMS server failed but all Executive Scorecard component servers are fully functioning" (on page 61)
- "The SAP BusinessObjects Enterprise server is unusable, but the RDBMS server and its databases are intact" (on page 63).
- "The Data Warehouse server is unusable, but the RDBMS server and its databases are intact." (on page 64)
- "The IT Executive Scorecard server is unusable, but the RDBMS server and its databases are intact." (on page 64)
- "The Management, SAP BusinessObjects CMS/Audit or Executive Scorecard Database is Corrupted" (on page 65)
- "Recover from a Failure of a Single-Server Deployment of IT Executive Scorecard" (on page 66)

For more detailed information on Data Warehouse disaster recovery, see the Learn About Data Warehouse Recovery section in the *Data Warehouse Admin Guide*.

The RDBMS server failed but all Executive Scorecard component servers are fully functioning

Scenario: The RDBMS server has become unusable, for example the hard disk has crashed. The following procedure describes how to recover a failed RDBMS server.

1. Reinstall a RDBMS server with Microsoft SQL 2008 Enterprise with SP2, configured with mixed mode and using the TCP/IP protocol.
2. Restore the RDBMS server databases using the weekly full and the relevant differential backup. The IT Executive Scorecard databases are the:
   - Management database
   - CMS database
   - Audit database (if installed separately from the CMS database)

- SAP BusinessObjects Data Services database
- Staging database
- Target database
- Executive Scorecard database

Note: The SAP BusinessObjects Data Services, Staging, and the Target databases (All Data Warehouse related databases), must be restored to an RDBMS server and to databases with names that are the same as those used in the initial IT Executive Scorecard installation.

Note: It is recommended that where possible the Management, SAP BusinessObjects Enterprise CMS, SAP BusinessObjectsEnterprise Audit, and Executive Scorecard databases are restored to an RDBMS server and to database names that are the same as those used in the initial IT Executive Scorecard installation. If you restore to a different RDBMS server or a database with a different name, follow the instructions in steps 4 and 5.

3. Once you have restored the SAP BusinessObjects Data Services, Staging, and the Target databases, you must associate the database login names and database users by running the following scripts.
   - **For the staging database:**
     - **EXEC sp_change_users_login 'Auto_Fix', 'dws', NULL, 'password'** where password is the old password for the dws login.
     - **EXEC sp_change_users_login 'Auto_Fix', 'dwst', NULL, 'password'** where password is the old password for the dwst login.
     - **EXEC sp_change_users_login 'Auto_Fix', 'dwmetadata', NULL, 'password'** where password is the old password for the dwmetadata login.
     - **EXEC sp_change_users_login 'Auto_Fix', 'dwabc', NULL, 'password'** where password is the old password for the dwabc login.
     - **EXEC sp_change_users_login 'Auto_Fix', 'xrefgen', NULL, 'password'** where password is the old password for the xrefgen login.
   - **For the target database:**
     - **EXEC sp_change_users_login 'Auto_Fix', 'dwt', NULL, 'password'** where password is the old password for the dwt login.
   - **For the SAP BusinessObjects Data Services database**
     - **EXEC sp_change_users_login 'Auto_Fix', 'login name', NULL, 'password'** where login name is the new login name you created when you created the SAP BusinessObjects Data Services database, and password is the password you assigned to that login name.
4. If the names of the RDBMS server and all the restored databases are the same as those configured in the initial Executive Scorecard Configuration Wizard, skip to step 7.
5. If the RDBMS server, or database names are not identical, and you are restoring the CMS or the Audit database, on the SAP BusinessObjects Enterprise server, reconfigure the CMS and if necessary, the Audit ODBC Data Source as follows:
   a. On the SAP BusinessObjects Enterprise server, on the Windows taskbar, click **Start** > **Run**, and enter **c:\WINDOWS\SysWOW64\odbcad32.exe**.

   b. Click the **System DSN** tab, select the relevant ODBC connection, and then click **Configure**.

   c. If required, on the **Microsoft SQL Server DSN Configuration** dialog box, change the **SQL Server** you want to connect to, and then click **Next**.

   d. If required, on the **Microsoft SQL Server DSN Configuration** dialog box, change the **Login ID** used to connect to the SQL Server, and then click **Next**.

   e. If required, on the **Microsoft SQL Server DSN Configuration** dialog box, change the **default database**, click **Next**, click **Finish**, and continue to step 6.

6. If you restored to a different RDBMS server host name, or the Management, CMS, Audit, Executive Scorecard database names are different, rerun the Post_Install Configuration Wizard, and when prompted on the relevant wizard pages, connect to the new RDBMS server, and new databases and complete the wizard.

   To run the Post-Install Configuration Wizard, on the Windows taskbar, click **Start** > **All Programs** > **HP Executive Scorecard** > **Administration** > **Configuration Wizard**.

7. On the Executive Scorecard and Data Warehouse servers, disable and then enable HP Executive Scorecard as follows:
   a. On the Windows taskbar, click **Start** > **All Programs > HP Executive Scorecard** > **Administration** > **Disable HP Executive Scorecard**.

   b. On the Windows taskbar, click **Start** > **All Programs > HP Executive Scorecard** > **Administration** > **Enable HP Executive Scorecard**

The SAP BusinessObjects Enterprise server is unusable, but the RDBMS server and its databases are intact

Scenario: The SAP BusinessObjects Enterprise for IT Executive Scorecard server has become unusable, for example the hard disk has crashed. The following procedure describes how to recover the SAP BusinessObjects Enterprise for IT Executive Scorecard server.

1. Install a new Microsoft Windows 2008 R2 server that will be used as the SAP BusinessObjects Enterprise server.

   The server must conform to the relevant hardware and software requirements described in the *Executive Scorecard Installation and Configuration Guide*.

2. Connect to your RDBMS server, and in the Management database in the SETTINGS_MANAGEMENT table, change the value of **bo.engine.is.installed** to **False**.

3. Enter the Executive Scorecard DVD and progress in the Installer wizard. On the **Select Features** page, select **SAP BusinessObjects Enterprise Components**, and continue the installation.

4. In the Configuration Wizard, connect to the existing management database. Once you connect to the Management database, when relevant, the values entered in the previous configuration are automatically presented on the wizard pages.

5. When configuring SAP BusinessObjects Enterprise for IT Executive Scorecard, connect to the existing CMS and Audit databases (or select **Install Audit schema in the CMS database**, if that is how it was installed in the original installation), and complete the Configuration Wizard using the settings you used in the initial configuration.

6. When the installation finishes, import the SAP BusinessObjects Enterprise configuration backup using the Import Wizard, and restore the SAP BusinessObjects Enterprise configuration.

   For more information on using the Import Wizard, see **Chapter 7 of the SAP BusinessObjects XI 3.1 Import Wizard Guide** at http://help.sap.com/businessobject/product_guides/boexir31/en/xi3-1_bip_importwiz_en.pdf

The Data Warehouse server is unusable, but the RDBMS server and its databases are intact.

Scenario: The Data Warehouse server has become unusable, for example the hard disk has crashed. The following procedure describes how to recover a Data Warehouse server.

1. Install a new Data Warehouse server running Microsoft Windows 2008 R2.

   The server must conform to the relevant hardware and software requirements described in the *Executive Scorecard Installation and Configuration Guide*.

2. Enter the Executive Scorecard DVD and progress in the Installer wizard. On the **Select Features** page, select **HP Data Warehouse Components**, and continue the installation.

3. When the Installer Wizard completes and you see the Introduction page of the Configuration Wizard, if changes were made to the core content packs, before continuing, restore **<XS Install Directory>\agora\ContentPacks** from a backup.

4. Start configuring the Configuration Wizard, and connect to the management database. When you reach the Data Warehouse section, on the **Configure Data Warehouse** page, select **Reinstall Data Warehouse**, and then click **Next**.

   After the rerun process is complete, the **Configuration Status** page appears listing the installed components.

5. Restore any other required configuration files as described in **Learn About Data Warehouse Backups**, and **Files to Back Up** sections of the *Data Warehouse Admin Guide*.

The IT Executive Scorecard server is unusable, but the RDBMS server and its databases are intact.

Scenario: The IT Executive Scorecard server has become unusable, for example the hard disk has crashed. The following procedure describes how to recover the Executive scorecard server.

1. Install a new Microsoft Windows 2008 R2 server that will be used as the IT Executive Scorecard server.

   The server must conform to the relevant hardware and software requirements described in the *Executive Scorecard Installation and Configuration Guide*.

2. Enter the IT Executive Scorecard DVD and progress in the Installer wizard. On the **Select Features** page, select **HP Executive Scorecard Components**, and continue the installation.

3. In the Configuration Wizard, connect to the existing Management database .

Once you connect to the Management database, when relevant, the values entered in the previous configuration are automatically presented on the wizard pages.

4. When you configure IT Executive Scorecard, connect to the existing IT Executive Scorecard database, and complete the Configuration Wizard using the settings you used in the initial configuration.

The Management, SAP BusinessObjects CMS/Audit or Executive Scorecard Database is Corrupted

Scenario: A database is corrupted. The following procedure describes how to recover from a corrupt database.

1. Restore the database from your backups. Restore using the full weekly backup and the relevant differential backup.

   Note: It is recommended that the RDBMS server, and database names are identical to those used in the initial installation. This information can be found in the Management database.

2. Once the database is restored, if the RDBMS server, and database names are identical to those used in the initial installation, do as follows:

   On the IT Executive Scorecard and Data Warehouse servers, disable and then enable IT Executive Scorecard as follows:

   a. On the Windows taskbar, click **Start** > **All Programs > HP Executive Scorecard** > **Administration** > **Disable HP Executive Scorecard**.

   b. On the Windows taskbar, click **Start** > **All Programs > HP Executive Scorecard** > **Administration** > **Enable HP Executive Scorecard**

   c. If the RDBMS server, or database names are not identical, and you are restoring the CMS or the Audit database, on the SAP BusinessObjects Enterprise server, reconfigure the CMS, and if necessary the Audit ODBC Data Source as follows:

      1. On the SAP BusinessObjects Enterprise server, on the Windows taskbar, click **Start** > **Run**, and enter **c:\WINDOWS\SysWOW64\odbcad32.exe**.

      2. Click the **System DSN** tab, select the relevant ODBC connection, and then click **Configure**.

      3. If required, on the **Microsoft SQL Server DSN Configuration** dialog box, change the **SQL Server** you want to connect to, and then click **Next**.

      4. If required, on the **Microsoft SQL Server DSN Configuration** dialog box, change the **Login ID** used to connect to the SQL Server, and then click **Next**.

      5. If required, on the **Microsoft SQL Server DSN Configuration** dialog box, change the **default database**, click **Next**, click **Finish**, and continue to step d.

   d. If the RDBMS server, or database names are not identical, run the Configuration Wizard on the relevant component server, and enter the connection and authentication details for the relevant databases.

      To run the Configuration wizard:

      On the Windows taskbar, click **Start** > **All Programs** > **HP Executive Scorecard** > **Administration** > **Configuration Wizard**.

> **Note**: For more information on recovering from a Data Warehouse database corruption, see the **Recovering When the Staging or Target Databases is Corrupted** section of the *Data Warehouse Admin Guide*.

Recover from a Failure of a Single-Server Deployment of IT Executive Scorecard

Scenario: The Single-server installation has failed and the server needs to be recovered. The following procedure describes how to recover a single-server deployment using the existing databases.

1. Install a new Microsoft Windows 2008 R2 server that will be used for the single-server installation.

   The server must conform to the relevant hardware and software requirements described in the *Executive Scorecard Installation and Configuration Guide*.

2. Connect to your RDBMS server, and in the Management database in the SETTINGS_ MANAGEMENT table, change the value of **bo.engine.is.installed** to **False**.

3. Enter the Executive Scorecard DVD and progress in the Installer wizard. On the **Group Selection** page, select **HP Executive Scorecard - Single Server Installation**, and continue the installation.

4. When the Installer Wizard completes and you see the **Introduction** page of the Configuration Wizard, if changes were made to the core content packs, before continuing, restore **<XS Install Directory>\agora\ContentPacks** from a backup.

5. In the Configuration Wizard, connect to the existing management database, and continue in the wizard connecting to existing SAP BusinessObjects and Executive Scorecard databases.

   Note: Once you connect to the Management database, the values entered in the previous configuration are automatically presented on the wizard pages.

   Note: When configuring SAP BusinessObjects Enterprise for IT Executive Scorecard, connect to the existing CMS and Audit databases (or select **Install Audit schema in the CMS database**, if that is how it was installed in the original installation).

6. When you reach the Data Warehouse section, on the **Configure Data Warehouse** page, select **Reinstall Data Warehouse**, and then click **Next**.

   After the rerun process is complete, the **Configuration Status** page appears listing the installed components.

7. Restore any other required configuration files as described in **Learn About Data Warehouse Backups**, and **Files to Back Up** sections of the *Data Warehouse Admin Guide*.

8. When the installation finishes, import the SAP BusinessObjects Enterprise configuration backup using the Import Wizard, and restore the SAP BusinessObjects Enterprise configuration.

   For more information on using the Import Wizard, see **Chapter 7 of the SAP BusinessObjects XI 3.1 Import Wizard Guide** at http://help.sap.com/businessobject/product_guides/boexir31/en/xi3-1_bip_importwiz_en.pdf

Connect an External Data Store to the IT Executive Scorecard application

Executive Scorecard normally utilizes data from its the IT Executive Scorecard Data Warehouse. Executive Scorecard can be configured to load data from an external data store rather then than using the IT Executive Scorecard Data Warehouse.

To do this, you must create a new, or modify an existing SAP BusinessObjects Universe, that must connect to the data store.

The following sections describe the basic guidelines on how universes should be created or modified for usage by the KPI Studio and Engine in IT Executive Scorecard.

- "Guidelines on Representing Entities on a Universe" (on page 67)
- "Required Actions" (on page 67)
- "Universe Limitations" (on page 68)
- "Field Types" (on page 69)

Guidelines on Representing Entities on a Universe

1. SAP BusinessObjects classes represent the name of the entity that is presented.
2. Objects in a class represent the attributes of that entity.
3. Objects must be of type Date, String, or Numeric.
4. Any entities (represented by a class) in the same universe must be related.
5. Hierarchical relationships should be flattened and related as attributes, although these attributes can be defined in a joined table.

Required Actions

1. Ensure that a new or modified universe resides in a logical SAP BusinessObjects folder called “XS Studio”.
2. You must create a connection between your SAP BusinessObjects server hosting the universe and the data store. For example a JDBC or ODBC connection.

   Once this connection has been created, on the Executive Scorecard server, you must Disable and Enable the server as follows: On the Windows taskbar, click **Start** > **All Programs** > **HP Executive Scorecard** > **Administration** > **Disable HP Executive Scorecard**, and then **Enable HP Executive Scorecard**.
3. You must have a universe called **Core_Dimensions_Universe**, that contains a class called **Period** with the following attributes:

Period Class Attributes

Attribute Name	Description
Name	The name of the attribute. It must be unique (For example FY2011/02(Feb))
StartDate	The start date of the period. (The type must be datetime)
EndDate	The end date of the period. (The type must be datetime)
Periodicity	One of the following values: ANNUAL, QUARTERLY, MONTHLY, WEEKLY, DAILY
YearNumber	The year which the period belongs to. (For example 2011. The type must be numeric).
PeriodNumber	A count of the period in the year. (For example for 2011/02, the period number is 2. The type must be numeric.)
Year	The year name which this period belongs to. (For example FY2005)
Quarter	The quarter name which this period belongs to. Used if the record requires this field to be filled.
Month	The month name which this period belongs to. Used if the record requires this field to be filled.
Week	The week name which this period belongs to. Used if the record requires this field to be filled.
Day	The day name which this period belongs to. Used if the record requires this field to be filled.

For more information see the following example:

Name	Periodicity	StartDate	EndDate	YearNumber	PeriodNumber	Year	Quarter	Month	Week	Day
FY2009	ANNUAL	02/01/2008	1/31/09	2,009	2,009	FY2009				
FY2025/Q4	QUARTERLY	11/01/2024	1/31/25	2,025	4	FY2025	FY2025/Q4			
FY2007/04(Apr)	MONTHLY	04/01/2006	4/30/06	2,007	4	FY2007	FY2007/Q1	FY2007/04(Apr)		
FY2012/W46	WEEKLY	12/12/2011	12/18/11	2,012	46	FY2012	FY2012/Q4	FY2012/11(Dec)	FY2012/W46	
FY2011/04/24	DAILY	5/24/10	5/24/10	2,011	113	FY2011	FY2011/Q2	FY2011/04(May)	FY2011/W17	FY2011/04/24

This is used by Executive Scorecard for all Period definitions, and so should be consistent with the periods the data is connected to.

4. Ensure that the data in the data store is aligned with the time zone configured in the IT Executive Scorecard Configuration Wizard.

Universe Limitations

When creating the SAP BusinessObjects Universe, there are certain limitations to the Universe features that can be used.

1. There is no current support for classes held within classes, or for any other hierarchies.
2. Ensure that multiple joins between entities represented in the universe do not exist. (This is a

universe limitation).

Note: To create multiple joins between database tables, use a Business Object alias.

3. Class names must be unique.
4. To create a KPI formula with a “Count” of an entity, the entity must contain at least numeric or string field. It is therefore recommended that each entity has at least one attribute of one of those types.
5. Conditions on objects are not supported.
6. Detail object cannot be associated with an attribute.
7. Do not put mappings in the universe. This is where fields are translated from the value in the database to the value that the universe returns. If you need such functionality, it is bet to create an underlying View in the database that will make that transformation.

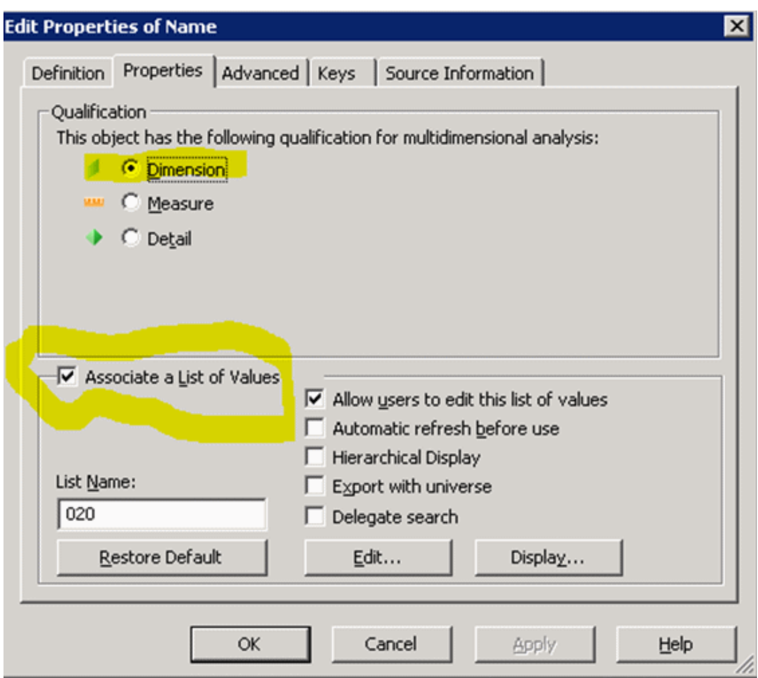
Field Types

When representing fields in the universe, the following guidelines should be followed:

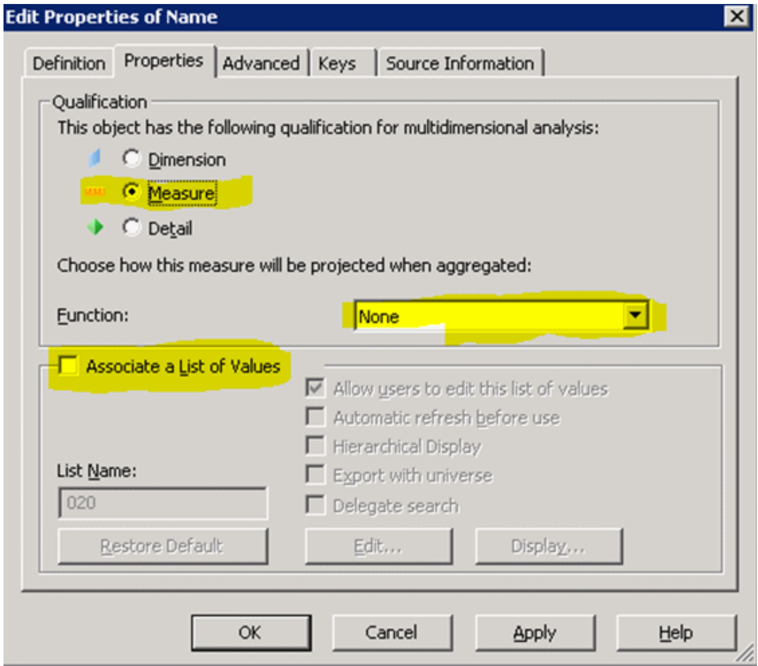
- **Dimensions**
  - Attributes that KPIs can be broken down by, must be marked as Dimensions. See the figure below.
  - To display a limited set of values in the formula builder, in the **Edit Properties of Name Dialog** box, select **Associate a List of Values**. See the figure below.

    Note: The Studio only displays the first 100 values.

    Warning: Even though only 100 values will be displayed, all values are loaded into the Studio memory . Therefore the **Associate a List of Values** field should only be selected for fields that have a small set of values.



- **Measures**
  - Fields only used as measures in KPI formulas, must be configured with a Qualification set to Measure, Function set to None, and ensure that Associate a List of Values is not selected. See the figure below.



Troubleshooting

To access various troubleshooting issues, see the *IT Executive Scorecard Troubleshooting Guide*.

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