HP IT Executive Scorecard

For the Windows ® operating system

Software Version: 9.40

Getting Started Guide

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Software Release Date: June 2013

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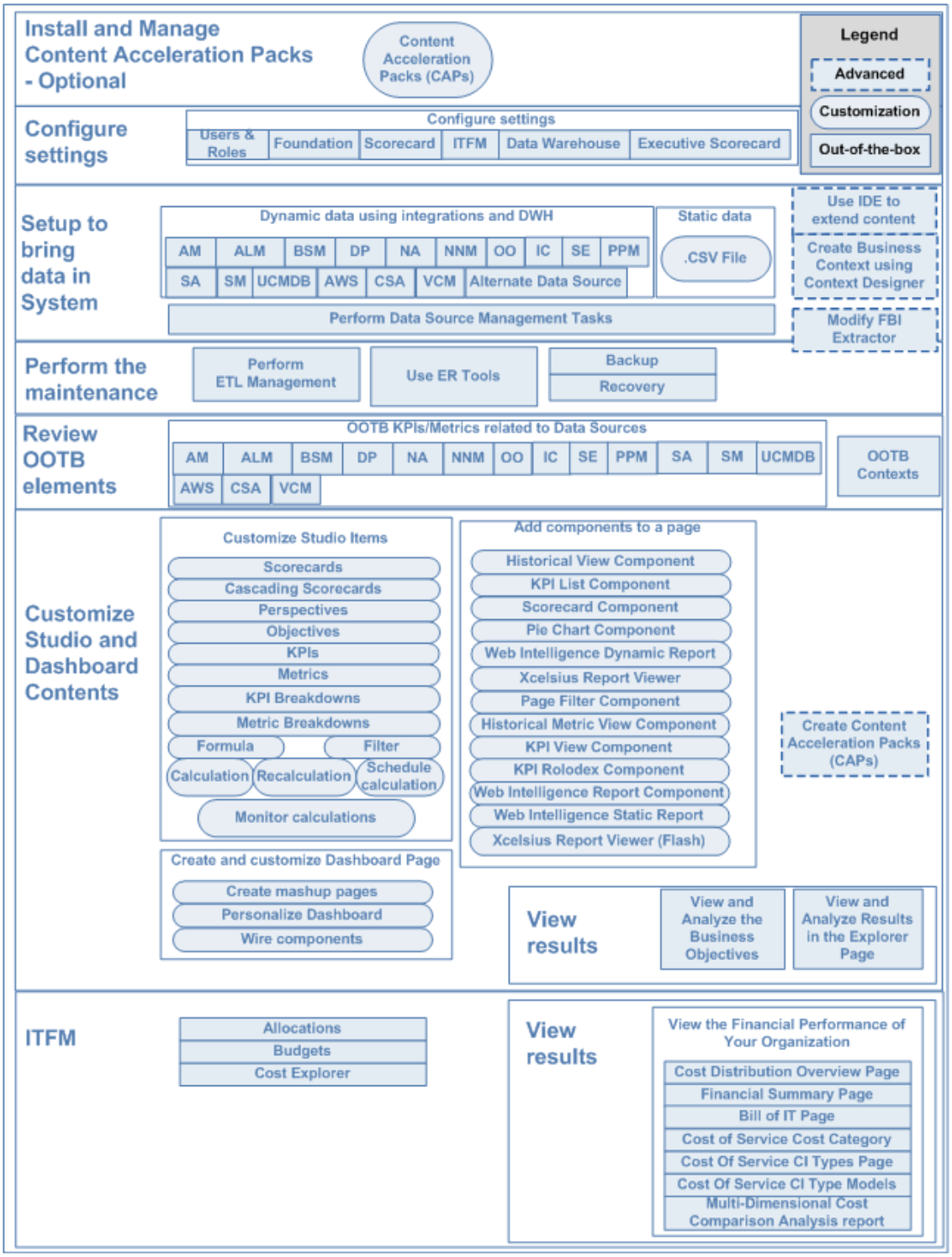
Quick Access Chart

HP IT Executive Scorecard automatically gathers metrics from across your IT systems to build key performance indicators (KPIs) providing organizations with broad and deep insight into everything IT does.

The image below provides the main workflow of Executive Scorecard.



Optional - Install and Manage Content Acceleration Packs

Content Acceleration Pack in the *Administrator Guide*.

Configure Settings

Users and Roles in the *Administrator Guide*.

Perform Administration Tasks for Foundation in the *Administrator Guide*.

Scorecard Settings in the *Administrator Guide*.

ITFM Settings in the *Administrator Guide*.

Data Warehouse Settings in the *Administrator Guide*.

XS Settings in the *Administrator Guide*.

Set up to Bring Data in the System

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

  AM Data Source in the *Content Reference Guide*.

  ALM Data Source in the *Content Reference Guide*.

  AWS Data Source in the *Content Reference Guide*.

  BSM Data Source in the *Content Reference Guide*.

  CSA Data Source in the *Content Reference Guide*.

  DP Data Source in the *Content Reference Guide*.

  NA Data Source in the *Content Reference Guide*.

  NNM Data Source in the *Content Reference Guide*.

  OO Data Source in the *Content Reference Guide*.

  IC Data Source in the *Content Reference Guide*.

  SE Data Source in the *Content Reference Guide*.

  PPM Data Source in the *Content Reference Guide*.

  SA Data Source in the *Content Reference Guide*.

  SM Data Source in the *Content Reference Guide*.

  UCMDB Data Source in the *Content Reference Guide*.

  VCM Data Source in the *Content Reference Guide*.

  Alternate Sources in the *Content Reference Guide*.

  Data Source Management in the *Administrator Guide*.

- **Static Data**

  Semantic Layer - Data Loader in the *Administrator Guide*.

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

Perform the Maintenance

- Perform DW ABC tasks. For details, see ETL Management in the *Administrator Guide*.
- Use the ER Tools. For details, see Enterprise Readiness (ER) Tools ETL Management in the *Administrator Guide*.
- Executive Scorecard Back Up and Perform Recovery in the *Administrator Guide*.

Review the OOTB Elements

- OOTB KPIs/Metrics related to Data Sources. For details, see "KPIs, Metrics, Contexts, and Data Source Integrations" on page 22 in the *KPIs, Metrics, and Data Lineage Reference Guide*.
- OOTB Contexts. For details, see Reference: Contexts (Universes) in the *Content Reference Guide*.

Customize the Studio and Dashboard contents

- **Customize the Studio Contents**

  Scorecard Configuration Details in the *Business Analyst Guide*.

  Cascading Scorecards in the *Business Analyst Guide*.

  Perspective Configuration Details in the *Business Analyst Guide*.

  Objective Configuration Details in the *Business Analyst Guide*.

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

  KPI Breakdowns in the *Business Analyst Guide*.

  Metric Breakdowns in the *Business Analyst Guide*.

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

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

Calculation in the *Business Analyst Guide*.

Recalculation in the *Business Analyst Guide*.

Calculation Scheduling in the *Business Analyst Guide*.

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

- **Customize Dashboard Pages**

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

  Wiring Between Components in the *Business Analyst Guide*.

  Explorer in the *Business Analyst Guide*.

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

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

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

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

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

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

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

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

  The Scorecard Component in the *Business Analyst Guide*.

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

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

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

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

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

  Personalize the Dashboard in the *Business Analyst Guide*.

View Results

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

Explorer in the *Business Analyst Guide*.

ITFM

Allocation Management in the *Financial Analyst Guide*.

Budget Management in the *Financial Analyst Guide*.

Cost Explorer in the *Financial Analyst Guide*.

View the Financial Performance of Your Organization:

- Cost Distribution Overview Page in the *XS Reports Reference Guide*.
- Financial Summary Page in the *XS Reports Reference Guide*.
- Bill of IT in the *XS Reports Reference Guide*.
- Cost of Service Cost Categories Page in the *XS Reports Reference Guide*.
- Cost of Service CI Types Page in the *XS Reports Reference Guide*.
- Cost of Service CI Types Models Page in the *XS Reports Reference Guide*.
- Multi-Dimensional Cost Comparison Analysis Report in the *XS Reports Reference Guide*.

Advanced Configurations

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

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

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

Create Content Acceleration Packs in the *Administrator Guide*.

Step-by-step with IT Executive Scorecard

This section contains basic steps that you can take to begin working with IT Executive Scorecard.

Prerequisites

- Read the *IT Executive Scorecard Release Notes* available on the Installation DVD. The document includes release notes, and installation and upgrade information.
- Read the *IT Executive Scorecard Support Matrix* available on the Installation DVD. The document includes information about the supported data sources and the requirements.
- Install Executive Scorecard and run the post-install wizard. For details, see the *IT Executive Scorecard Installation and Configuration Guide* (interactive document) available on the Installation DVD.
- Set up the users, permissions, settings, run ETLs, maintenance issues, and more. For details, see Getting Started with Administration Tasks in the *Administrator Guide*.
- Troubleshooting issues are detailed in the *IT Executive Scorecard Troubleshooting Guide* in Excel format.

Populate Executive Scorecard using Content Acceleration Packs

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

Upload data into Executive Scorecard using .CSV files

You can simply and easily upload data into the Executive Scorecard Studio using .CSV files without intergrating with external sources or other HP products. The Studio can then be used to integrate with third party data sources, testing, or for Proof of Concept (POC) sessions. For details, see Create and Manage Contexts Using Context Designer and Upload Data Using the Import Wizard in the *Administrator Guide*.

Populate Executive Scorecard and upload data using integrations with supported data sources

To view dynamic data in the Dashboard pages and reports, you must integrate with supported data sources. For details, see Getting Started with the Content Reference Guide in the *Content Reference Guide*.

If you installed one of the data sources that have out-of-the-box support, you can use the data-source management integration. For details, see Integrate the Data Sources in the *Content Reference Guide*.

For details about the integrations, review the end-to-end flows. For details, see "End-to-End Flows" on page 76.

Create and customize contexts (universes)

View the out-of-the-box universes created by integrations with supported data sources. For details, see Reference: Contexts (Universes) in the *Content Reference Guide*.

You can also create your own context (universe) using the existing database tables, and tables created by importing .CSV files, and creating relationships between these tables. You can select the entities you want to use to create KPIs in the Studio, and then use these KPIs to build the relevant Dashboard pages. For details, see Create and Manage Contexts Using Context Designer and Upload Data Using the Import Wizard in the *Administrator Guide*.

Combine data and contexts from all methods

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

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

Review and customize the contents of the Studio and Dashboard pages

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

Review Scorecards, Perspectives, Objectives, and KPIs in the Studio. You can customize these items. For details, see Configure a Scorecard, Configure a Perspective, Configure an Objective, or Assign/Unassign KPIs to/from Objectives in the *Business Analyst Guide*.

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

Work with IT Financial Management

With the IT Financial Management module, you can view financial data from the HP Asset Manager, HP Project and Portfolio Management data sources in the Finance tab. You can create allocation scenario for planned costs and actual costs, perform a multi-dimensional cost analysis, finalize the budget for your organization, and view the financial performance of your organization in Dashboard pages and reports. For details, see Getting Started with Financial Planning and Analysis in the online help or in the *Financial Analyst Guide*.

Localize and globalize XS: Executive Scorecard

The user interface of HP Executive Scorecard supports multiple languages. For details, see Localize and Globalize Executive Scorecard in the *Administrator Guide*.

View the Executive Scorecard on a Tablet or a Mobile

For details, see Getting Started with the XS for Tablet Min App in the *Getting Started with XS for Tablet* or Getting Started with the XS for Smartphone Mini App in the *Getting Started with XS for Mobile*.

View IT Financial Management on a Tablet

For details, see Getting Started with the IT XS Financial Management for Tablet Min App in the *Getting Started with IT XS Financial Management for Tablet*.

Extend your content (Advanced users)

- **Develop content and model DWH schema using IDE**

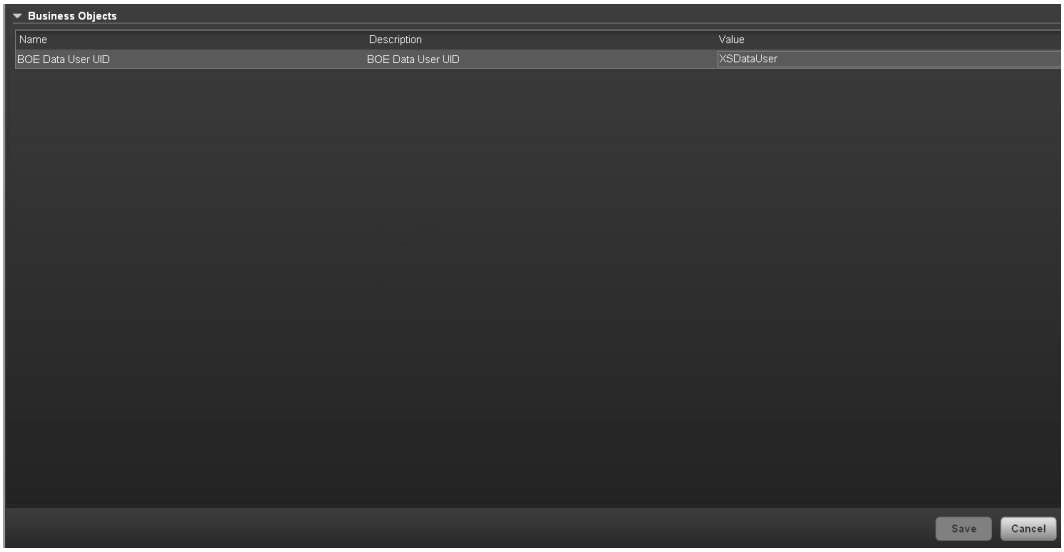
  The Integrated Development Environment (IDE) allows you to develop content. For details, see Develop New Content Using the Integrated Development Environment in the *Content Extension Guide*.

  Other capabilities are detailed in the *Content Extension Guide* available from the Executive Scorecard 9.30 in the HP Software Product Manual Site (**http://h20230.www2.hp.com/selfsolve/manuals**).

Executive Scorecard Components

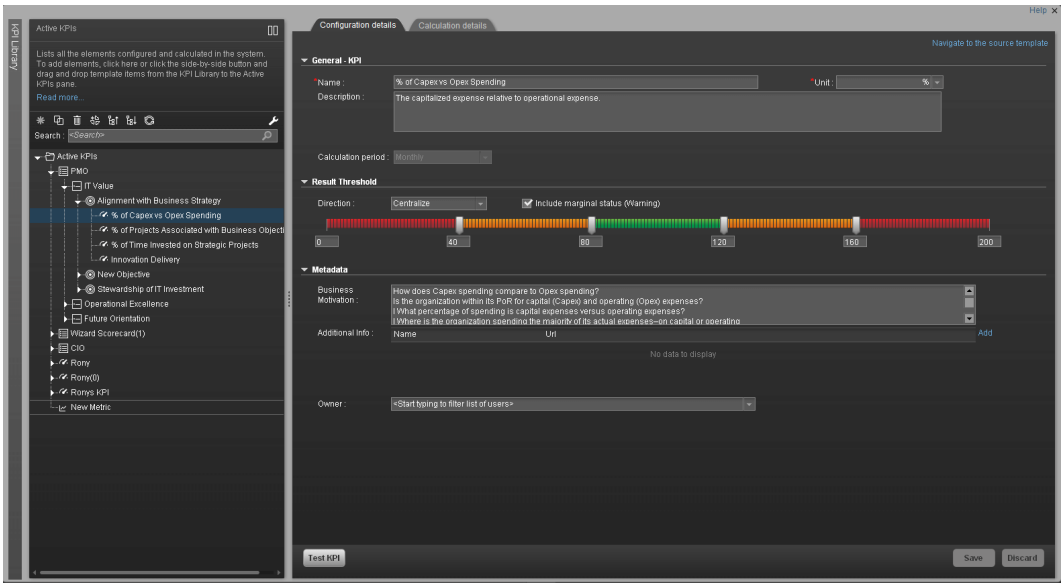
HP IT Executive Scorecard and IT Financial Management include the following user interface components:

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



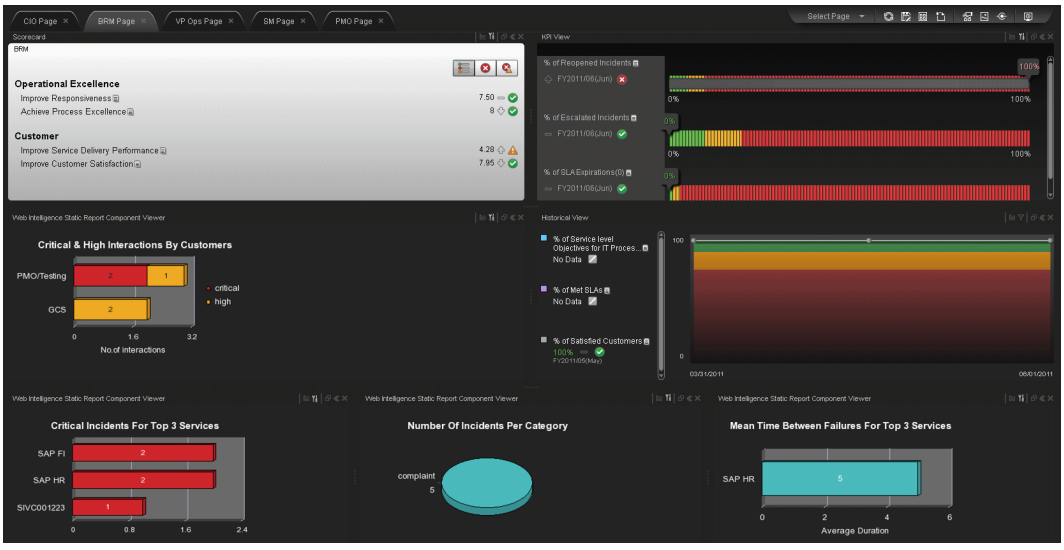
Studio. The component where the Business Analyst can:

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



Dashboard. The component where:

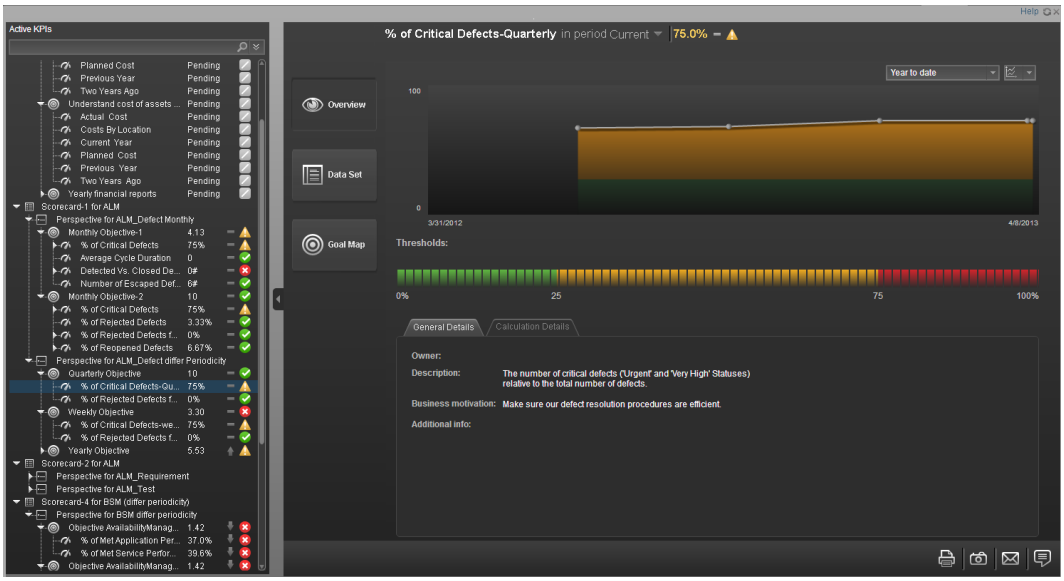
- The Business Analyst can create pages and components for the customer. For concept details about the Dashboard, see Executive Dashboard Capabilities in the *Business Analyst Guide*. For details about what you can do in the Dashboard, see Prepare the Dashboard Display in the *Business Analyst Guide* .
- The Executive can view the pages relevant to the Executive role. For details about what the Executive can view in Dashboard, see View and Analyze the Business Objectives in the *Business Analyst Guide*.
- The CIO, IT Financial Manager, IT Financial Analyst, and IT Manager can view IT Financial Management-related reports. For details, see View the Financial Performance of Your Organization in the *Financial Analyst Guide*.



Explorer. The component where the Executive can:

- View overtime information about Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs.
- View configuration and additional information.
- Add, edit, and email annotations.

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



Finance. The component where the Financial Analyst can create and enrich the allocations using Allocations, create allocation scenarios using Cost Explorer, create and publish budgets using Budget. For details, see Getting Started with Financial Planning and Analysis in the *Financial Analyst Guide*.

Select Scenario
vero
Settings
Filters
Group by Dimension
X-Axis:
Customer
Budget Line
(None)
Fiscal Year
Measures
Measure 1:
Plan
Measure 2:
Actual
Measure 3:
(None)
Sort by
Alphabetical
Filter Costs by Currency
Show All Costs
Show Costs Subset:
Scale
(None)
Update Chart
Plan
Actual
(None)
FY2010
FY2011
FY2012
FY2013
FY2014
FY2015
FY2016
FY2017

Content Acceleration Packs

Content Acceleration Packs (CAPs) are ready-to-import packages that include Dashboard pages that display Scorecards and components, KPIs, Metrics, Contexts (universes), data (.CSV files), and documentation for the CAP.

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

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

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

KPIs, Metrics, Contexts, and Data Source Integrations

This section provides information about the Data Sources, the Contexts linked to the data sources, and the corresponding KPIs and Metrics. The links to the Contexts, and to the consolidation sections correspond to sections in the *Content Reference Guide*. The links to the KPIs and Metrics correspond to sections in the *Data Lineage Reference Guide*.

This section also appears in the *Getting Started with IT Executive Scorecard*.

Data Sources Corresponding to Contexts

This section lists for each data source (Content Pack), if there is a need for consolidation when working with other data sources, the corresponding concepts (universes) and the KPIs and Metrics related to the data source.

Note: The Period context (Period Context) does not have an external data source .

Important:

- If you are viewing this document in PDF format, skip to "KPIs, Metrics, Contexts, and Data Source Integrations" above.
- If you are viewing this document online, note that this page is interactive. Select the data sources you want to integrate in the list below to display only the relevant information lower down in the page:

ALM - HP Application Lifecycle Management
AM - HP Asset Manager
AWS - Amazon Web Services and **VCM** - vCenter Chargeback Manager
BSM - HP Business Service Management
DP - HP Data Protector
CSA - HP Cloud Service Automation
IC - HP Insight Control
NA - HP Network Automation
NNM - HP Network Node Manager
SA - HP Server Automation
SE - HP Storage Essentials
SM - HP Service Manager
OO - HP Operation Orchestration
PPM - HP Project and Portfolio Management
UCMDB - HP Universal Configuration Management Database

Check your selections

The following steps are customized according to your selections. Check that your selections are correct.

If any selections are not correct, click **Change**.

HP Application Lifecycle Management Data Source

(ALM Data Source).

Context	KPIs and Metrics
ALM_Defect (ALM_Defect Context	% of Critical Defects % of Rejected Defects % of Reopened Defects Average Cycle Duration Average Time to Resolve Production Defect Defect Resolution Time Detected vs Closed Defects Ratio Number of Escaped Defects
ALM_Requirement (ALM Requirement Context	% of Documented Requirements % of Requirements Traced to Tests % of Reviewed Requirements % of Tested Requirements Average Time to Review Requirement
ALM_Test (ALM Test Context)	% of Actual vs Planned Executed Tests % of Authorized Tests % of Automated Tests % of Completed Tests % of Failed Tests % of Successful Test Runs % of Tests Resulting in Defects
Consolidation	

Context	KPIs and Metrics
with PPM (Consolidate Between ALM and PPM)	

HP Application Portfolio Management Data Source

(BSM Data Source).

Context	KPIs and Metrics
ApplicationPortfolioManagement (ApplicationPortfolioManagement Context)	Average Availability Rating Average Maintainability Rating Average Performance Rating Number of Applications in Lifecycle Categories Number of Applications in the Portfolio
Consolidation	
with BSM (Integrate BSM and APM).	

Amazon Web Services Data Source and vCenter Chargeback ManagerData Sources

(AWS Data Source and VCM Data Source)

Context	KPIs and Metrics
CloudOptimization (CloudOptimization Context)	AWS and VCM Amount of Used Storage Incoming Network Traffic Outgoing Network Traffic Number of Used Instances

HP Business Service Management Data Source

(BSM Data Source).

Context	KPIs and Metrics
ApplicationPerformance (ApplicationPerformance Context)	% of Affected End Users by Application Quality % of Failed Business Transactions % of Monitored Applications % of Non-Encrypted Traffic

Context	KPIs and Metrics
AvailabilityManagement (Availability Management Context)	% Availability of Services % of Applications Availability % of Met Application Performance % of Met Service Performance Mean Time Between Failures of Services Mean Time to Repair a Service
Consolidation	
• with UCMDB (Consolidate Between BSM and uCMDB). • with APM (Integrate BSM and APM).	

HP Cloud Service Automation Data Source

(CSA Data Source).

Context	KPIs and Metrics
CloudOptimization (CloudOptimization Context)	Organization Spending for Services Network Traffic Number of Service Subscriptions IT Service Cost Service Subscription Lifespan Dependency Level on Resource Provider Resource Provider Cost Service Profit Margin Service Profit Margin by Organization Service Revenue Public vs Cloud Private Spending

HP Data Protector Data Source

(DP Data Source).

Context	KPIs and Metrics
DataProtection (DataProtection Context)	Average Time to Restore Backup Success Rate Consecutive Backup Failure Period Number of Servers Being Backed Up Number of Servers with Non-Encrypted Backup Data Recovery Point Objective Recovery Time Objective Restore Operations Success Rate Time Elapsed since Last Backup Volume of Protected Data

The Context includes the Node entity, so you can create a KPI based on that entity and then break it down by service and/or application.
Do not create a Service to Application drill down or an Application to Service drill down.

HP Insight Control Data Source

(IC Data Source).

Context	KPIs and Metrics
PowerManagement (Incident Management Context)	Average Cooling Cost of a Node Average Cooling Cost of Data Center Nodes Average Electricity Consumption of a Node Average Electricity Consumption of Data Center Nodes Average Electricity Cost of a Node Average Electricity Cost of Data Center Nodes Total Power Cost of Data Center Nodes

The Context includes the Node entity, so you can create a KPI based on that entity and then break it down by service and/or application.
Do not create a Service to Application drill down or an Application to Service drill down.

HP Network Automation Data Source

(SA Data Source and NA Data Source).

Context	KPIs and Metrics
PolicyRemediation (PolicyRemediation Context)	• SA alone: ▪ Average Time to Deploy an Application • SA and NA: ▪ % of Successful Patches ▪ Average Time to Configure a Node ▪ Average Time to Patch a Node ▪ Average Time to Provision a Node
PolicyCompliance (PolicyCompliance Context)	• SA and NA: ▪ % of Managed Nodes ▪ % of Nodes with Compliance Issues ▪ Average Time to Run Compliance ▪ Frequency of Policy Checks ▪ Ratio of Security Related Nodes
PolicyComplianceStatus (PolicyComplianceStatus Context)	• SA and NA: ▪ Mean Time to Recover from Non-Compliance • SA, NA, and Arcsight: ▪ Mean Time for Hardening

The Context includes the Node entity, so you can create a KPI based on that entity and then break it down by service and/or application.
Do not create a Service to Application drill down or an Application to Service drill down.

HP Network Node Manager Data Source

(NNM Data Source).

Context	KPIs and Metrics
• SA and NA: ▪ Mean Time to Recover from Non-Compliance • SA, NA, and Arcsight: ▪ Mean Time for Hardening	% of Network Devices with Availability Issues % of Network Devices with Reachability Issues % of Utilization of Network Devices Average Throughput of Network Devices Network Latency

The Context includes the Node entity, so you can create a KPI based on that entity and then break it down by service and/or application.
Do not create a Service to Application drill down or an Application to Service drill down.

HP Operation Orchestration Data Source

(OO Data Source).

Context	KPIs and Metrics
OrchestrationAutomation (OrchestrationAutomation Context)	• Monthly ROI

HP Project and Portfolio Management Data Source

(PPM Data Source).

Context	KPIs and Metrics
• FinancialManagement (Financial Management Context)	% of Actual vs Planned Projects Cost % of Change in Business Service Cost % of Change in Project Cost % of IT POR vs Total Revenue % of OpEx % of Projects Budget at Risk % Variance of Actual vs Planned Costs Average Cost of IT Delivery Per Customer Innovation Delivery

Context	KPIs and Metrics
ProjectPortfolioManagement (Project Portfolio Management (PPM) Context)	% of Healthy Projects % of Project Effort Done by External Resources % of Project Tasks on Time % of Projects Associated with Business Objectives % of Projects on Time % of Projects with Unresolved Urgent Issues % of Time Invested on Strategic Projects Average Delivery Time of New Products or Services Average Project Initiation Time Deviation of Planned Work Hours Number of Identified Issues Number of Opened Risks

HP Server Automation Data Source

(SA Data Source and NA Data Source).

Context	KPIs and Metrics

PolicyRemediation (PolicyRemediation Context)	• SA alone
	  ▪ Average Time to Deploy an Application
	• SA and NA: Average Time to Deploy an Application
	  ▪ % of Successful Patches
	  ▪ Average Time to Configure a Node
	  ▪ Average Time to Patch a Node
	  ▪ Average Time to Provision a Node

Context	KPIs and Metrics
PolicyCompliance (PolicyCompliance Context)	• SA and NA: Average Time to Deploy an Application ▪ % of Managed Nodes ▪ % of Nodes with Compliance Issues ▪ Average Time to Run Compliance ▪ Frequency of Policy Checks ▪ Ratio of Security Related Nodes
PolicyComplianceStatus (PolicyComplianceStatus Context)	• SA and NA: Average Time to Deploy an Application ▪ Mean Time to Recover from Non-Compliance • SA, NA, and Arcsight: Average Time to Deploy an Application ▪ Mean Time for Hardening

The Context includes the Node entity, so you can create a KPI based on that entity and then break it down by service and/or application.
Do not create a Service to Application drill down or an Application to Service drill down.

HP Storage Essentials Data Source

(SE Data Source).

Context	KPIs and Metrics
Storage Management (Storage Management Context)	% of Storage Utilization Number of Critical Storage Events

HP Universal Configuration Management Database Data Source

(UCMDB Data Source).

Context	KPIs and Metrics
RequestManagement (Demand Management) (RequestManagement (DemandManagement) Context)	There are no KPIs dedicated to the UCMDB data source.

The Context includes the Node entity, so you can create a KPI based on that entity and then break it down by service and/or application.
Do not create a Service to Application drill down or an Application to Service drill down.

Common Use Cases

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

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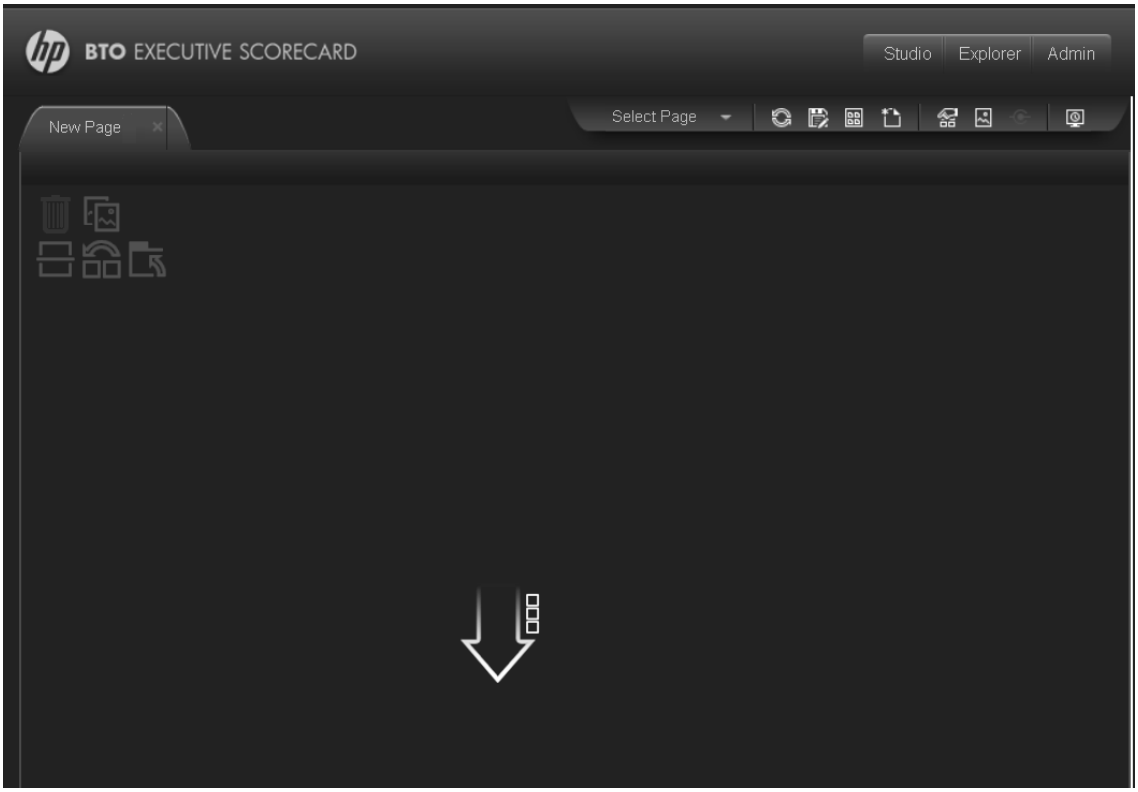
Use Case - Create a New Dashboard Page

In this section you will learn how to create a new Dashboard page, define the page layout, and add components.

1. In the application, close all tabs to open the Dashboard.

2. Click the **New Page** button in the Dashboard toolbar. An empty page appears.

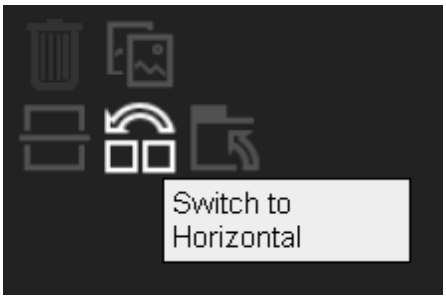
   It has a single vertical layout by default:



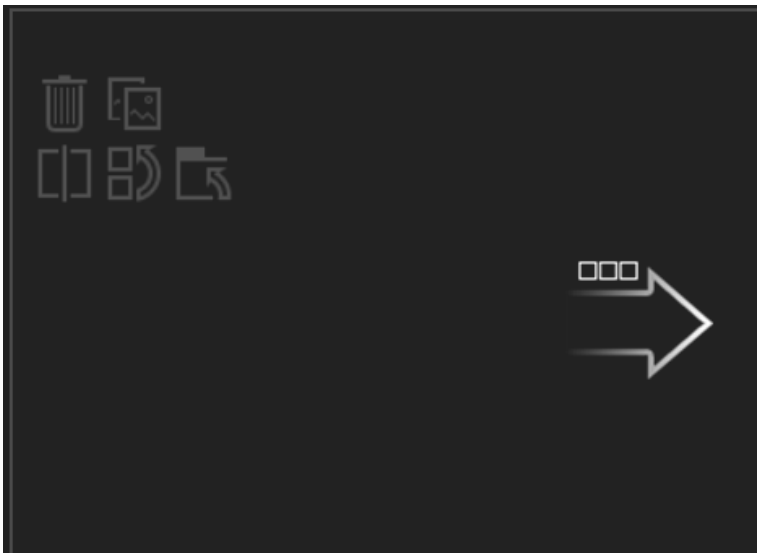
   For more details, see Add a Page to the Dashboard in the *Business Analyst Guide*.

3. Click to split the page into two horizontal components.

4. From the layout tools in the upper left area, click **Switch to Horizontal**.



The layout is now oriented horizontally:



For more details, see Configure Page Layout – Configure the Layout of Components on a Page Scenario in the *Business Analyst Guide*.

5. Click **Switch to tabs** to create a multi-tabbed area in the left pane:

For more details, see Configure Page Layout – Create a Tabbed Component in a page Scenario in the *Business Analyst Guide*.

Note: To remove an area click the **Remove Layout** icon.

6. Now, add components to the page layout you created.

7. Click the '**Add component**' icon in one of the areas, or click the **Components** button in the top right menu bar to open the **Components** dialog box..

8. In the Component Gallery page that opens, double-click the component to place it in the layout area, or select the component and drag it to an area on the page, and close the Component Gallery page.

9. Select the component you want to add to one of the areas you created, and drag it to that area. Do the same for all the other areas.

   For more details, see "Modify Component Categories" in the *Business Analyst Guide*.

10. For a Tab area, drag the components you wish to add and for each component a new tab will appear.

11. After adding the relevant components to the relevant areas, save the page by clicking the **Save** icon. Enter a page name, add a description, and decide under which category the page will be saved. If you do not select a category, the page is saved in the **Non Categorized** category.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - Build a Scorecard Tree and Create a New KP

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

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

1. Click the **Studio** button (top right corner) to open the Studio.

2. In the **Active KPIs** pane, select the main root folder and click the **Create a new entity** icon.

3. Select the **Scorecard** option in the menu that opens.

   A **New Scorecard** node is added at the bottom of the tree in the **Active KPIs** pane. The new Scorecard has an automatically generated unique name. The Scorecard is automatically selected in the tree. You can then configure the Scorecard. For details, see "Configure a Scorecard".

   For more details, see "Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" on page 1 in the *Business Analyst Guide*.

4. Name the Scorecard entity accordingly, add description, and click **Create**. For more details, see "Configure a Scorecard" on page 1 in the *Business Analyst Guide*.

5. Select the Scorecard entity you just created , and click once again the **Create a new entity** icon , or use the right-click menu and select **Create new** > **Perspective**.

   For more details, see "Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" on page 1 in the *Business Analyst Guide*.

6. Name the Perspective, add a description, and click **Create**. For more details, see "Configure a Perspective" on page 1 in the *Business Analyst Guide*.

   You can create several Perspectives under a single Scorecard.

7. Select the Perspective entity, click the **Create a new entity** icon and select **Objective**.

   For more details, see "Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" on page 1 in the *Business Analyst Guide*.

8. Name the Objective, enter a description, if needed change the calculation period and rule. Click **Create** to complete the Scorecard tree creation.

   For more details, see "Configure an Objective" on page 1 in the *Business Analyst Guide*.

You can create several Objectives under a single Perspective.

Each Objective can contain more than a single KPI or even several Objectives.

9. After creating the Scorecard structure you can drag one of the OOTB KPIs from the KPI Library or simple create a new KPI.

10. To create a new KPI, select the relevant Objective, click the **Create a new entity** icon and select **KPI**.

    For more details, see "Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" on page 1 in the *Business Analyst Guide*.

11. Name the new KPI, enter a description, set the thresholds, change the default Business Context, and enter the relevant formula. Click **Create** to complete the KPI creation.

    For more details, see Configure a KPI or a Metric in the *Business Analyst Guide*.

12. To find out the expected result for the KPI you created, click the **Test KPI** button. If the result does not meet your expectation, modify the KPI accordingly and check again the expected result.

13. Once the KPI you created is ready to be calculated, you will need to launch the Engine by clicking **Calculate now**. For more details, see Calculate Displayed Values after Configuration Change in the *Business Analyst Guide*.

    The engine will calculate the new KPI result and you will be able to present it in the Dashboard.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - Create a New Metric

In this section you will learn how to create a new Metric.

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, select the **Metrics and Unassigned KPIs** folder and click the **Create a new entity** icon and select **Metric**.
3. Name the new Metric, enter a description, set the units and the calculation period. Click **Create** to complete the Metric creation.

   For more details, see Configure a KPI or a Metric in the *Business Analyst Guide*.
4. Click the **Calculation Details** tab to select the relevant **Business Context** and to set the formula and filter. Once you are done, click **Create** .
5. To find out the expected result for the Metric you created, click the **Test Metric** button. If the result does not meet your expectations, modify the Metric formula and check again to check the expected result.
6. Once the Metric you created is ready to be calculated, launch the Engine by clicking **Calculate now**. For more details, see Calculate Displayed Values after Configuration Change in the *Business Analyst Guide*.

   The engine will calculate the new Metric result and you will be able to view it in the Dashboard.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

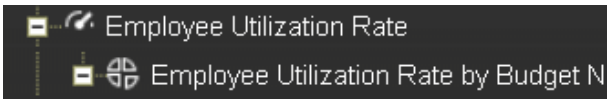
Use Case - Create KPI Breakdowns and Configure Breakdown Override

In this section you will learn how to create a KPI Breakdown and configure Breakdown Overrides.

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the Active KPIs pane, perform one of the following actions:
   - Select the relevant KPI, and click the **Create a breakdown for the KPI** button in the toolbar.
   - Right-click the relevant KPI, and select **Breakdown** in the menu that opens.
3. Select the entity and field or dimension with which you want to breakdown the KPI.

   The KPI Breakdown is inserted as a child of the KPI with the Breakdown icon.

   Example of a KPI Breakdown:

   You can add more than one breakdown.

   You can add other KPI Breakdowns to the same KPI or you can create a second level Breakdown below the Breakdown you have just created. There is no limit on the number of KPI Breakdowns you can create, but keep in mind that it may affect the performance of the XS engine.

   Once you have created a KPI Breakdown, the new entity derives its target threshold configuration and its owner from the parent KPI.

   For more details, see Manage KPI Breakdowns in the *Business Analyst Guide*.

4. To set different thresholds or owners to a KPI Breakdown:
   a. you must calculate the KPI and its KPI Breakdowns. To do so, select the **Calculate options** button and select **Calculate** now. The Calculation might take some time. For more details, see Calculate Displayed Values after Configuration Change in the *Business Analyst Guide*.

   b. Click the **Add a Breakdown Override** option and select the relevant KPI Breakdown for which you want to override thresholds and owner.

   c. Adjust the thresholds and the owner details and click **OK**. For more details, see Manage Overrides in the *Business Analyst Guide*

      Repeat this step for any KPI Breakdown you want to override.

You can remove or edit the overrides you have created by clicking the **Delete** and **Edit** icons near each record.

At the end of the process, click **Save** to keep the modifications you made and run the calculation once more to update the results based on your last modifications.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - Display and Modify KPI Properties

In this section you will learn how to modify a KPI or a Metric configuration.

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, select the KPI or Metric you want to modify.
3. In the right pane, select the **Configuration Details** tab.
4. In the **General – KPI** or **General – Metric** area you can change the KPI or Metric name, select a different unit or enter a custom unit, and you can also change the calculation period of the KPI or Metric.
5. In the **Result Threshold** area (only for KPIs), you can change the Threshold direction, include marginal status, and set the thresholds boundaries freely.
6. In the **Additional details** area, you can add to the KPI additional information that will be shown in the Dashboard and the Explorer.
7. In the **Business Motivation** field (only for KPIs) you can add the business justification of the KPI.
8. In the **Additional info** field you can add information that will be displayed with the KPI or Metric. This can be a URL, a BO report, another Dashboard page and even Xcelsius reports.
9. In addition, you can set an owner for the KPI or Metric. The owner will get the annotations of the KPI or Metric when they are added for the KPI or Metric in the Explorer tab.
10. Save your changes and click the **Calculation Details** tab.
11. In the **Calculation Details** tab, you can change the KPI or Metric business context and you can update the KPI or Metric formula and filter.
12. Use the **Comments** field to store any additional information.
13. Save your changes and click the **Test KPI** or **Test KPI** button to check if the current configuration gives you the expected result.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

For more details, see Configure a KPI or a Metric in the *Business Analyst Guide*.

Use Case - Configure a KPI or Metric Formula

In this section you will learn how to configure a KPI or a Metric formula.

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, select the KPI or Metric whose formula you want to modify.
3. In the right pane, click the **Calculation Details** tab and click the **Open the Formula Builder** link.
4. Remove the current formula and start creating your own formula.
5. Click **Validate** to make sure that the syntax is correct.
6. Click **OK** to close the dialog and click **Save** to save the changed formula.
7. Use the **Test KPI** button to check if the result you are getting according to the configuration, meets your expectation. If not, modify it and check it again.

Example:

Let's create a formula with the COUNT function (for this example we will use Incident Management as Business Context).

1. From the **Functions** pane, double click the **COUNT** function or select the **COUNT** function and click the Add button, or select the **COUNT** function and drag it to the bottom area.

   The syntax of the formula appears above in the description area.

   The COUNT function returns the number of entities satisfying the given Filter Expression condition. For example, if you want to count the number of open incidents you need the following entities:

   - Entity to count is Incident
   - Filter expression is Incident.Status = 'Open'

2. Let's add these entities to the **COUNT** function according to its structure:
   a. Click inside the formula brackets, go to the **Variables** pane, and locate the Incident entity (you can use the search field).

   b. Double-click the entity or select the entity and click the **Add** button.

      The Incident entity appears in the first section of the COUNT function.

3. Move to the second section of the **COUNT** function, and locate the **Status** entity in the **Variables** pane.

4. Add it to the formula.
5. You can now add the condition operator equal and select the **Open value** from the list.

   The formula should be as follows: **COUNT (Incident, Incident.Status='Open')**

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

For more details, see Configure a KPI or a Metric in the *Business Analyst Guide*.

Use Case - Create Cascading Scorecards

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

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

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

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, select the parent Scorecard from which the executive can drill down. (the Scorecard for which you want to create Cascading Scorecards).
3. Click the **Manage Cascading Scorecard** link and double-click or use the arrow buttons to move the Scorecard you want to cascade to from the **Available Scorecards** pane to the **Assigned Scorecards** pane.

   Note that you can select multiple Scorecards.
4. Click **OK** and then click **Save** to save the configuration.

Now, the executive will be able to move from the main Scorecard to its Cascading Scorecards and to view their data with a single click.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

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

Use Case - Add an Annotation, Send Email, Save as PDF, and Print

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

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

1. Access:
   a. The First Level Navigation tooltip: in the relevant Dashboard page component, mouse over the page icon near the relevant entity. Once the tooltip appears, move the cursor to the Action bar at the bottom.

   b. The Explorer tab: double-click the Page icon or click the **Show more** link inside the First Level Navigation tooltip. The same action bar appears at the bottom of the Explorer window.

2. You can now:
   - Add an annotation, click the **Add annotation** button, add the text and click the **Add** button to post the annotation.
   - Send an email to the Owner of the entity, click the **Send Mail** icon. If you send an email right after adding an annotation, the content of the annotation is automatically added to the email.
   - Export a First level navigation tooltip to a PDF file, click the **Save snapshot** icon.
   - Print the content of the tooltip, click the **Print** icon.
   - View additional information related to that specific entity, click the **Additional info** icon. The icon is enabled only if additional information was added to the entity in the Studio.

For more details, see View and Analyze Results in the Explorer Page in the *Business Analyst Guide*.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - Filter Components

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

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

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

To filter using the Page Filter component:

1. In the Executive Dashboard, select the relevant page (click the **Page Gallery** button if the page you want does not already appear in the Dashboard).
2. Click the **Components** button.
3. In the Component Gallery dialog box that opens, double-click the Page Filter component (for details, see The Page Filter Component) to place it in the layout area, or select the component and drag it to an area on the page, and close the Component Gallery page. For details, see Component Gallery Dialog Box.
   - If the target area is hidden by the Component Gallery dialog box, click the Component Gallery dialog box title bar and drag it to another location on your screen.
   - If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of the target area, and not to the part of the component that is colored white.
4. Close the Component Gallery dialog box.
5. The basic configuration of the Page Filter component includes the **Period** filter. Select a time period and click the **Filter** button and all the data of the components located on the same page, is filtered automatically based on the selection you made.
6. You can add additional fields to the component and filter the page according to them. To do so, click the **Configure Component** icon. A list of available dimensions appears in the Available dimensions pane. Those dimensions are created based on the KPI or Metric Breakdown configurations you set earlier in the Studio.
7. Select one of more dimensions and move them to the **Selected dimensions** area.
8. Click **OK**. The new dimensions appear in the Page Filter and you or the Executive user can use them to refine, in addition to the time period, the filtering of the other components of the page.

9. To clean the filter selection, click the **Clean filter** option.
10. Once you filter the page according to your needs, click **Save**.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

For more information about the Page Filter component, see Add a Page Filter Component to a Page in the *Business Analyst Guide*.

Use Case - Schedule an Automatic KPI Context Calculation

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

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

1. Click the **Studio** tab.

2. In the Active KPIs pane, select the relevant KPI, click the **Calculation options** button, and select the **Schedule context calculation** option.

   Note that you schedule the calculation per Business Context.

3. In the Business Context Calculation Scheduling dialog box, select the relevant business context in the drop down **Business Context** list, and in the **Schedule details** area, enter the day and time when you want to run the scheduled calculation. Click **Save**.

   You can select additional Business Contexts and schedule their calculation run in the same way.

4. Once the calculations are scheduled, click **Save** to save the configurations.

At the scheduled time, the following processes take place:

- The calculations of the KPIs associated with the business context are performed for the current period.
- The Objectives including these KPIs are also calculated for the current period.
- The Scorecards and components that include these KPIs are refreshed when you open the Dashboard.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - Create a New Business Context

In this section you will learn how to create a new Business Context.

Executive Scorecard enables the importation of data into the Studio using all the out-of-the-box integrations with other HP products.

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

1. Upload data from the .CSV file into the Studio:

   a. Create the .CSV file containing the data you want to use in the Studio (for example: latest.CSV).

   b. In **Executive Scorecard, click the Admin > Semantic Layer > Semantic Layer**. In the **Context Management** page, click **Launch Content Designer**.

   The Context Designer page appears.

   c. Select **Create a new context**.

   d. Enter the name of the new Context in the **Context Name** field and click **Open Repository**.

   The **Repository** area opens.

   e. Click the **Add Table** button to open the Import Wizard (data loader). Follow the steps to upload the .CSV file. For details, see Create and Manage Contexts Using Context Designer and Upload Data Using the Import Wizard in the *Administrator Guide*.

   f. Click the **Upload data file** button.

   The file is uploaded. The upload operation saves the changes you made to the .CSV file. Once the import procedure is completed, the new table is lisetd in the **External Tables** section in the Repository.

2. To use a richer model, you can import multiple CSV files where a column in one file is a reference to a column in another file. To do that, continue uploading the relevant CSV files that can be joined together.

3. Join imported tables and internal tables to create the Context as follows:

   a. Once you finished uploading all the CSV files, drag the tables you created to the design area.

   b. To link two tables, drag an attribute from one table to the attribute of the second table that contains the data that can be joined. You can create multiple connections.

   c. When the structure of the Context is ready, drag the tables to the **Entities** pane.

d. In the **Entities** pane, you can change the entities names, remove unnecessary attributes and configure additional features.

e. Run the **Validation** before saving the new Context.

4. Click the **Admin** tab and refresh the list of contexts to check that the new context is listed.
5. After you have create a context, you can create a new KPI using the enhanced data model.
6. Click **Studio** and create a new KPI in the Active KPI pane.

   a. Configure the KPI name and thresholds and change the Business Context to the one you just created.

   b. Click the **Calculation Details** tab and click **Open the Formula Builder**. Create the formula you wish to use to calculate the KPI.

      The variables listed in the Formula Builder dialog box correspond to the attributes of the CSV tables. For more details, see Modify a KPI or Metric Formula in the *Business Analyst Guide*.

7. Validate the KPI and click **Save**.
8. Click **Test the KPI** to check if the result meets your expectations.
9. Once the KPI configuration is done, calculate the KPI and present it in the relevant Dashboard page.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - Create, download and upload Content Acceleration Packs (CAP)

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

Create the new CAP:

1. **Prerequisite**: Before creating the CAP, make sure you have already created all the relevant Scorecards, KPIs , Metrics, Pages and Contexts that you wish to include in the CAP and that they have been calculated with the expected results. If you find that some content is missing, go back and create it. Once this is done. you can start creating the CAP.

2. In Executive Scorecard, click **Admin > Content Acceleration Pack**.

   The page displays the list of available CAPs.

3. Click the **Create a new CAP** button to open the Create Content Acceleration Pack wizard where you can create the CAP.

   Click **Next** and specify the CAP name, author, version, description, recalculation date and link to any relevant document.

   Click **Next** and in the **Select Pages** wizard page, select the pages you want to include in this CAP.

   > **Note:** Once you have selected a Page, the Scorecards, KPIs, and Metrics that are included in that page and the Contexts that are assigned to the KPIs included in the page, are automatically selected. If you want to add to the CAP additional elements like Scorecards, KPIs, and more, click the **Next** button and modify your selection in the other pages of the wizard. Otherwise you can jump directly to the Summary wizard page.

4. Click **Create** to create the CAP. Once the CAP is created you cannot modify it. The new CAP is displayed in the list of CAPs in the CAP Management page. In the right pane you can see the contents of the CAP you have just created. For details, see Manage Content Acceleration Packs Using CAP Management.

For additional details, see Create Content Acceleration Packs in the *Administrator Guide*.

Activate the CAP:

By default, the new CAP is deactivated.

When you activate a CAP, all the content of the CAP is added to current data (Contexts, KPIs, Pages, etc.) and a recalculation is performed according to the CAP definitions.

To activate a CAP:

1. Prerequisites:

   The CAP is in the list of available CAPs and is not activated.

2. In Executive Scorecard, click **Admin > Content Acceleration Pack.**.

   The page displays the list of available CAPs.

3. Select the relevant CAP and click **Activate**.

   You get a notification that the CAP is being activated. Click **Yes** to complete the Activation. It takes a few minutes.

   If a CAP that shares the same content was already activated, an alert warns you that activating the new CAP will override the overlapping instances.

   Once the activation is complete, an indication is added to the CAP.

4. You can now:

   - View the Business Context details in Context Designer. For details, see Create and Manage Contexts Using Context Designer and Upload Data Using Data Loader.
   - View and expand the Scorecard tree in the Active KPIs pane. For details, see Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates in the *Business Analyst Guide*.
   - View the Scorecard, and KPIs configuration in the Configuration Details, and Calculation Details tabs. For details, see Configure a Scorecard or Configure a KPI or a Metric in the *Business Analyst Guide*.
   - View the Content Acceleration Pack page in Dashboard. For details, see Manage Page Categoriesin the *Business Analyst Guide*.
   - View information in Explorer. For details, see View and Analyze Results in the Explorer Pagein the *Business Analyst Guide*.

For additional details, see Activate a CAP in the *Administrator Guide*.

Download the CAP:

To download a CAP and save it to the local system to be used in other environments:

1. In Executive Scorecard, click **Admin > Content Acceleration Pack** tab.

2. Select **Content Acceleration**.

   The page displays the list of available CAPs.

3. Click to open a browser dialog box where you can select where you want to download the

CAP.

The CAP .ZIP file is saved at that location.

For additional details, see Download a CAP to the user's local system in the *Administrator Guide*.

Upload the CAP:

You can also add the CAP to your Executive Scorecard application by uploading it.

To upload a CAP to the Executive Scorecard application:

1. Prerequisites:
   - The .ZIP file of the CAP you want to upload is copied in an accessible file system.
   - A corresponding CAP (with the same UUID) does not already exist in the Executive Scorecard application.
2. In Executive Scorecard, click **Admin > Content Acceleration Pack.**.

   The page displays the list of available CAPs.
3. Click to open a browser dialog box where you can select the relevant .ZIP file corresponding to CAP you want to upload .
4. Check the **Activate CAP after upload** checkbox if you want to activate the CAP automatically when the upload is completed.

For additional details, see Upload a CAP from the user's local system to the Executive Scorecard application in the *Administrator Guide*.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - Renew a License

In this section, you will learn how to renew your Executive Scorecard license.

Renew your license

1. To access the IT Executive Scorecard start menu that is added to each machine, select **Start** > **Programs** > **HP Executive Scorecard**.
2. In the Administration folder, select **License Renewal**.

   The License Renewal wizard opens.

   a. Click **Next** on the License Management page.

   b. Select **Load a permanent or temporary license** and click the **Load** button to browse to the location of the license file.

   c. A validation check runs. After the validation passes, click **Next** to complete the renewal.
3. Disable HP Executive Scorecard and then enable HP Executive Scorecard on all servers so the new license can take effect.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - Create a New User (Permissions and Roles)

In this movie, you will learn how to create a new role and grant it permissions. Then you will learn how to assign the role to a group of users and how to add a new user to that group.

1. **Create a role:**

   a. Select **Admin** > **Users and Roles** > **Role Management**.

      The Role pane displays a list of predefined roles. Click each Role, to display the sets of permissions that are configured for the Role.

   b. In the Roles area, click to create a new role.

   c. Enter the name and description for the role.

   d. Click **OK** to save your role.

   For more details, see Manage Roles in the *Administrator Guide*.

2. **Grant permissions to the role:**

   a. In the Roles area, select the role you created and click . The Assign Permission to Role wizard opens.

   b. Select the relevant permissions from the list.

   c. You can assign resources to some of the permissions if available. Click to open the **Assign Resources to Permissions** page in the Assign Permission to Role wizard. Select a permission and use the arrows to move the required environments from the Available Resources list to the Selected Resources list.

   d. Click to add more permissions if needed.

   e. Click **Finish** after adding all the relevant permissions

   For more details, see Manage Roles in the *Administrator Guide*.

3. **Create a group and assign a role to the group:**

   You can assign a role to a user and to a group of users. Lets create a group and assign a Role to the group.

   a. Select **Admin** > **Users and Roles** > **User Management**.

   b. Select a user or group from the **Users & Groups** tab.

c. In the **Users & Groups** tab, click **Add group under the root** .

d. Enter the **Group Name** and **Group Description** and click **OK**. The group is added under the root.

e. Click **OK** to save your selections.

For more details, see Manage Users in the *Administrator Guide*.

4. You can now assign a Role to the group by clicking the Assign Role button:

a. Select the role you created from the **Available Roles** list and use the arrows to move the role to the **Selected Roles** list.

Note that you can view the roles permissions at the bottom of the Assign Roles dialog box.

For more details, see Manage Roles in the *Administrator Guide*.

5. Click **OK** to save your configuration.

6. **You can now create a User in the group and assign the new Role to that user:**

a. Click **User Management**.

b. In the **Users & Groups** tab, select the group and click **Create user** icon. The **Add user** dialog box opens.

c. Enter the Login name, a Display name, an Email, a password, and click **OK**.

The corresponding user is created in the group. The groups roles are automatically assigned to the new user. To assign a role to the user directly, click the user and assign a role in the same way we assigned a role to a group.

For more details, see Manage Users in the *Administrator Guide*.

As soon as you create a user and you assign it a Role– you can use that user to log in to Executive Scorecard.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - Activate or Deactivate a Data Source

In this section, you will learn how to activate and deactivate the different Data Sources supported by Executive Scorecard. The Data Source Management UI also enables you to edit configurations and test the database connections.

Add and activate a new data source instance:

The process of integrating a data source into the Data Warehouse is done through activation of the source instance.

1. Select **Admin** and then **Data Source Management**.
2. Click the **Add data source** to open the Data source wizard. The Add Data Source page opens.
3. Select the data source type and click **Next**.

   The relevant data source page opens.
4. Enter and select the configuration parameters.
5. Complete the wizard.

   The data source instance is activated.
6. If a data source instance has already been activated and deactivated, click next to the specific source and the source is activated.

This process verifies the configuration and then finalizes the connection between Executive Scorecard and the Data Source.

Note: You can deactivate the source and stop the integration process, in order to change configuration details.

1. Click and the deactivation warning opens.
2. Click **OK**.

Once you have deactivated the Data Source, data from this source is not taken into the ETL process.

Once a data source is configured, the next step is to run the actual ETL process.

Edit data source settings and test the connection:

1. If necessary, deactivate the data source by clicking .
2. Click **Edit Settings** and edit the configuration parameters.
3. Click **Next** to validate your changes and test the connection to the data source.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - Run the ETL

In this section you will learn how to run the ETL.

Note: Before running the ETL, make sure you have activated the relevant data source or in case you are using Alternate sources, make sure they are activated.

The ETL process includes 3 major steps:

To load or resume a batch job:

1. Select **Admin** > **ETL Management** .
2. When there is no running batch (stream state is **None**) or the running batch is in a suspended state (stream state is **Suspended**), click to load or resume a batch.

To verify or schedule the run_steps command:

1. Click in the Stream Information area.
2. The Stream Scheduler dialog box opens.
3. Select the **Run-Steps Scheduler** tab.
4. Click **Add New** to create a new schedule for a specific stream.
5. Click **Save**.
6. Click **Delete** to delete a displayed schedule. You can then add a new one to replace it.

To schedule a batch job:

1. Click in the Stream Information area.
2. The Stream Scheduler dialog box opens.
3. Select the **Load -Batch Scheduler** tab.
4. Select the relevant **Schedule Type** and times and click **Save**.

You can view the status of each step of the ETL process and if you want more information on a single step, mouse over the step and click **More Info** to view the additional information.

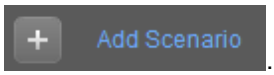
After the ETL Process completes, the data is available in the Executive Scorecard target schema, meaning you can run the engine calculation for the selected KPIs and view the results in the dashboard.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - ITFM - Create an Allocation Scenario

In this section, you will learn how to create an allocation scenario.

1. **Add an Allocation Scenario**
   a. In the main toolbar, click **Finance > Allocation management**.

   b. In the Allocation Management page left pane, click 

.

   c. Enter a unique scenario name, description, and start and end period in the right pane.

   d. Select the **Affect Dashboard** option if you want to display the new allocation scenario in the Dashboard.

   e. Select the **Reallocate Newest data** option if you want the allocation scenario to be automatically recalculated after new data is added.

   For more details, see Allocation Management Page in the *Financial Analyst Guide*.

2. **Add an Allocation Stage to a Scenario**

   You can add an allocation stage, such as cost centers or organizations, to help you enhance the cost information. You can further enrich the data with allocation rules that create new records without changing the original data. The sequence of the allocation stages and allocation rules determines how the allocation engine calculates the data.

   a. Click the **Planned Cost Stages** or **Actual Cost Stages** tab.

      Note that you can set a different scenario for Planned Cost and Actual Cost, but the process is the same.

   b. Click **Add Stage**. The Add Stage window opens.

   c. Give the stage a name, description and select the dimension you want to use in this specific stage and click **Save**.

      A new stage is created.

      If you want to pass the whole amount and not just the allocated one to the next stage, select the **Pass Full amount** option.

   For more details, see View, Define, Add, or Modify Allocation Stages in the *Financial Analyst Guide*.

   You must now define a rule to properly allocate the amounts.

3. **Add an allocation rule to an allocation stage:**

a. Click the relevant stage. The **<Stage Window>** dialog box opens.

   You can view the list of rules used in the allocation stage in the List of Rules pane.

b. In the List of Rules pane, click **Add Rule**. The Add Rule wizard opens. Follow its instructions and set the rule name and description.

   Note: You can add a rule as a placeholder in the stage without defining the allocation criteria immediately. The scenario remains in Draft mode until all rules are defined.

c. Click **Next** until you get to the **Rule Criteria** wizard page. The Rule Criteria specifies the conditions when the rule should be applied.

d. Drag a property or a dimension from the **List of Dimension Properties** to the right pane. An operation box is displayed to the right.

e. Select the operation to be performed by the rule in the **<operation list>**. A value box opens to the right.

f. Enter the value you want the operation to use, in the **<value>** box. This box can display a list of values, if you selected a dimension with existing values, for example Application Name or Manager Name.

g. You can then either select another dimension and drag it to the right pane. A box is added to the right pane where you can select either **and** or **or** to enable you to select how you want to link the rule criteria, or you can click **Next** to define the rule's targets to which you want to allocate the amounts and set the cost deviation between those targets.

h. Click **Finish** to return to the Allocation Stage detail page to view the list of rules.

The Allocation engine will then start the allocation process based on the stage you configured. The status of the scenario changes to **Complete** and after that you can continue with creating another stage and rules.

4. If needed, you can create additional stages until the scenario answers all your needs.

5. To test the scenario in the Cost explorer module, click the **Test in Cost Explorer** button. You are redirected to the Cost explorer page presenting data based on the current allocation scenario.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - ITFM - Create Budget Template

In this section, you will learn how to create a budget template.

1. **Create a budget:**
   a. Click **Finance > Budget Management**. In the Budget main page, click **Add Budget** to start creating the Budget template.

   b. In the New Budget dialog box enter the Budget Template name, set the time frame, start period, frequency, and unit.

   For more details, see Create Budgets in the *Financial Analyst Guide*.

2. **Add Cost Centers to a budget:**
   a. Select a Cost Center that you want to include in the budget, in the **Available cost centers** area or press Ctrl and click to select multiple Cost Centers.

   b. Click the arrows to move the selected Cost Centers to the **Selected cost center** area in order to include these Cost Centers in the budget.

   For more details, see Create Budgets in the *Financial Analyst Guide*.

3. **Add cost categories to the Cost Category groups:**
   a. In the **Available cost categories** area, select the cost categories that you want to include in the budget.

      If you want to include one or more cost categories together under a single group, you can do so by creating a group and assigning the relevant cost categories to it.

   b. Click the group for which you want to add cost categories.

   c. Click the arrow to move the selected Cost Categories to the **Selected cost categories** area.

   d. Click the **Finalize** button to complete the budget template creation. You return to the main Budget page.

   For more details, see Create Budgets in the *Financial Analyst Guide*.

4. **Notify the Cost Center Managers:**
   a. As the Budget Coordinator, you can send an email to the Cost Center Managers to let them know that they should edit their budgets. To do so, click the **Notify** button.

   b. The **Notification Management** dialog box appears. You can email the managers separately, or together by checking the Check Box next to the relevant Cost Center and clicking the **Send** button.

   c. Edit the email message if needed and complete the process by sending the email and closing the **Notification Management** dialog box.

The relevant Cost Center managers will receive an email regarding their Budget and each one of them can log in, edit the relevant budgets, and notify the Budget Coordinator that the budget is complete.

For more details, see Review, Accept, or Publish the Consolidated Budget in the *Financial Analyst Guide*.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - ITFM - Edit a Budget

In this section, you will learn how to edit a budget that was created earlier by the Budget Coordinator.

1. Click **Finance > Budget Management**.
2. In the Budget main page, select the budget you want to edit in the **List of budgets** and in the **Cost Centers** area (bottom part of the page), click in the **Actions** column next to the cost center budget under your responsibility.

   The Cost Center Budget View dialog is displayed.
3. Enter the relevant frequence in the **Freq.** drop down list.
4. You can set the amounts for each period and cost category according to the template the Budget Coordinator created for you.

   You can either enter the values manually or use an Excel sheet to import the values in one click.

   To use an Excel sheet, first Export the current template to an Excel file by clicking the Export button. Once the file is generated, edit it , save it, and import it back to the application using the Import button.

   For more details, see Enter Budget Data for a Cost Center or Mark Cost Center Completed in the *Financial Analyst Guide*.
5. You can 'save' a budget, stop working on it temporarily, and then continue to work on it later by clicking the **Save** button. Once the budget is complete and ready to be reviewed by the Budget Coordinator, click the **Complete** button and send it back for review by clicking the **Notify** button.
6. The Budget Coordinator receives the notification and starts reviewing the Budget.
7. If additional work is needed on the budget, the Budget Coordination clicks the **Reject** button corresponding to the budget and notifies you. You can then perform the requested changes and send the corrected budget back for an additional review.
8. Once the budget is approved, the Budget Coordinator approves it. When all Cost Centers budgets have been approved, the Budget Coordinator finalizes the budget by clicking **Publish**. The page closes. The budget status changes to **Published**.

   The published budget can be now be used in Allocations.

For more details, see Review, Accept, or Publish the Consolidated Budget in the *Financial Analyst Guide*.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie.

For details, see "Access Movies" on page 97.

Use Case - ITFM - Analyze, in the Dashboard, Financial Data Based on an Allocation

In this section you will learn how to analyze certain allocation scenario using the out-of-the-box Dashboard pages.

1. In the Dashboard, click the **Financial Summary** tab, if it is displayed, or click the **Page Gallery** button in the Dashboard toolbar, and drag the **Financial Summary** page outside the **Page Gallery** box, and close the box.

   This page displays a filter that the user can use to filter data based on a specific fiscal year by selecting one of the values from the dropdown list.

   Once you select a fiscal year, all the components in the page are refreshed with the corresponding data.

   This page displays 3 tiers:

   - Tier 1 displays yearly data in a threshold bar with the ratio between Actual vs Planned Cost for the selected year and 3 pie charts with the distribution of the Actual Costs by different dimensions : Suppliers, Opex vs Capex, Discretionary and Non-discretionary.
   - Tier 2 displays 2 overtime components.
     - The first one shows the distribution of Actual and Planned Cost month-by-month for the selected year.
     - The second component shows the cumulation of Actual Costs from the beginning of the year until the current month versusthe Total Planned Cost for that year.

     In addition, this component displays 2 lines that show the year-over-year comparison information.
   - Tier 3 shows a multi-header table that displays the distribution of Actual and Planned costs per locations.

     When you select an item in the Tier 2 components, the table in Tier 3 is automatically updated to display the related information.

     For more details, see View the Financial Performance of Your Organization in the *Financial Analyst Guide*.

2. You can change the type of periodicity type by selecting a different period from the drop down list in the filter component.

3. The **Cost Distribution Overview** page is similar to the Financial Summary page but shows data distributed by the selected Organization, Service, Customer, and Program.

These dimensions are hard-coded and the user can select one of them in the filter component. In addition, the use can select a fiscal year and can sort items by highest over-budget, highest planned costs or alphabetical order.

The List component shows a list of all the business services, organizations, programs, or customers in your enterprise, corresponding to the selected Page Type, available in the selected fiscal year, and sorted by the selected sort type in the page filter. Once you select a page type in the filter component, a list of values appears in the List component. Selecting one of the items in that list will refresh data on all components.

This page is divided into 2 tiers.

- The second tier displays 2 overtime components. The first one shows the distribution of Actual and Planned cost month-by-month for the selected year and for the specific item you selected in the List component starting from the first month of the selected fiscal year.
- The second component shows the year-over-year ratio of Actual Costs versus the Total Planned Cost month-by-month from the first month of the selected fiscal year.

Once you select a data point from one of the overtime charts, the right-hand bar chart component displays data distributed by several dimensions, for example: Program, Organization, Supplier and Cost category for business service item.

You can change the graph presentation from bars to grid.

For more details, see Cost Distribution Overview Page in the *XS Reports Reference Guide*.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - ITFM - Analyze Allocation Scenarios Using Cost Explorer

In this section, you will learn how to analyze an allocation scenario using Cost Explorer.

1. Click the **Finance** tab and select Cost Explorer from the navigation menu.
2. Select the relevant scenario in the **Select Scenario** drop down list.
3. Click **Update Chart** to display the configuration and analyze it.

   The scenario data is displayed.

   By default, you can view the **Actual vs Planned Allocations per Fiscal month** scenario .
4. You can select other X-axis to display other points of view.

   For example: change the A-axis from Fiscal month to Fiscal quarter and click the Update Chart button. The Chart is updated according to your setting and presents the data per quarter.
5. In addition, you can change the measurements from **Actual vs Planned** to other views.

   For example: change Measurement 2 to Variance to Plan and click the Update Chart button. The Chart is updated accordingly. You can define up to 3 measurements.
6. If you want to filter out specific currencies, select the **Show costs** subset option, select the relevant currency, and click the **Update Chart** button.
7. You can group charts by up to 3 dimensions and receive the list of charts.

   For example: select Budget line as the first Y-axis and click the Update Chart button.
8. The list of generated thumbnail charts is displayed in the top area. Select one of the charts thumbnails to display it in expanded format in the bottom area.

When the result of the filtering includes more than a single chart, you can sort the results by different aspects by selecting the relevant aspect in the Sort Chart bylist.

For more details, see Configure and View Cost Explorer in the *Financial Analyst Guide*.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - IDE - Overview

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

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

The eclipse tool contains 4 major areas:

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

Stream Designers:

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

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

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

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

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

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

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

The Integration Entity is a Source Table representation.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - IDE - Develop a New Entity

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

The data that used in this example comes from PPM.

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

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

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

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

   Repeat this procedure to create the Engineer_Context.

Now you can start designing the Architect Target Designer.

1. From the Package Explorer pane, select the Architect_Context folder you just created.
2. Right-click and select **New** > **Architect Target Designer**.
3. Enter a file name, in this case :PROJECT_STATUS_CSTM.architectcontext_diagram and click **Next**.
4. Click **Browse** and select **cp-core** and click **OK**.
5. Click **Finish** to finalize the context creation.
6. In the palette area on the right side, select **New Target Entity** and click in the canvas.
7. Enter an entity name ('PROJECT_STATUS_CSTM') and click **Enter**.
8. In the Properties tab select **General** and select the **Fact** checkbox.

9. Add a Target column by clicking **Target Column** in the palette area and click in the PROJECT_STATUS_CSTM entity frame.
10. For each column click **Target Column** and click in the PROJECT_STATUS_CSTM entity area and enter the name of the column.
11. Double-click **Load Target Entity** (in the palette area).
12. Expand the Core folder and select PERIOD/ Period entity and click **OK**.
13. Repeat this step and select PROJECT/ Project entity.
14. Create a link between the Fact you created and the Dimensions you loaded in the previous step by selecting **Fact to Dimension** in the palette area. Drag the arrow from the Fact column in the entity to the Dimension you want it linked to.
15. Create another link between the Fact and the Period dimension.
16. In the Properties tab select **Columns** and set the **Length** of each column to **255** and the **Measure** to **True**.
17. Save the configurations.

The design of Architecture context diagram is complete.

Now, you are ready to create the Engineer_Context.

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

The next step is to create a New Integration Entity.

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

Create SSI mapping between the Interaction entity and Target entity

1. In the palette area, click **Column Mapping** and drag a line between PROJECT_ID and PROJECT.
2. Once the link is created a new entity is displayed: PPM – PROJECT_STATUS CTSM Transformation.
3. Continue creating SSI mapping links accordingly.
4. Save your configurations.

Create a New Source Entity

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

The next step will be to generate the ETL.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - IDE - Extract an Existing Entity from the New Data Source

In this section you will learn how to extract an existing entity from a new data source using the IDE.

Specifically, to extract data from a non HP Changed Management application where their data was exported to a CSV file.

The purpose is to send the data from the CSV file to the data warehouse, in order to transform the data and put it into the Target schema so that the existing OOTB business context and KPIs can be reused.

Let's start with the modeling of the new source and integration entities.

1. Open the Eclipse IDE.
2. From the top menu select **File** > **Import**.
3. Under the General folder select **Existing Projects into workspace** and click Next.
4. Browse for the cp-core folder and click **OK**, click **Finish** to import the project.

Now you need to create an Integration Content pack and link it to the Core Content pack.

1. From the top menu select **File** > **New** > **Other**.
2. Select **DWH IDE Wizards** > **Content Packs**, select **Integration Content Pack** and click **Next**.
3. Specify the project name cp-cm (for Change Manager) and click **Next**. Check the cp-core and click **Finish**.
4. The Integration Content Pack is created.

The next step is to create the Source Content Pack and link it to the Integration CP.

1. From the top menu select **File** > **New** > **Other**.
2. Select **DWH IDE Wizards** > **Content Packs**, select **Source Content Pack** and click **Next**.
3. In the Project Name specify cp-cm-1.0-generic (1.0 is the version of Change Manager; 'generic' is the type of the data source that we extract the data from, in our case it's a CSV file) and click **Next**. Select cp-cm and click **Finish**.
4. The Source Content Pack is created.

Create an empty project for storing the Engineer Context Diagram.

1. From the top menu select **File** > **New** > **Project**.
2. Expand the **General** folder, select **Project** and click **Next**.
3. Specify a name, **Engineer_Context** and click **Finish**.
4. The project for storing the Engineer context diagram is created.

Now create the Engineer Context.

1. From the top menu select **File** > **New** > **Other**.
2. Select **DWH IDE Wizards** > **Engineer Context**, and click **Next**.
3. Change the file name to CHANGE.engineercontext_diagram and click Next.
4. Select cp-core as the Target CP directory, cp-cm as the Integration CP directory and cp-cm-1.0-generic as the Source CP directory and click **Finish**.
5. The Engineer context diagram is created and automatically opens.

Open an existing Target Entity.

1. Click Load Target Entity on the Palette and click in right part of the canvas to place it.
2. In the Resource Selector dialog box expand CORE, select CHANGE entity and click **OK**.
3. The CHANGE target entity containing all the relevant fields is added to the canvas.

Create a new Integration entity.

1. Click New Integration Entity on the Palette and click in the canvas to place it.
2. Change the name to CHANGE_CSTM.
3. Create the Integration entity fields.
4. Add the new field either by clicking **Integration Column** in the Palette and clicking the CHANGE_CSTM entity to place the field or by clicking the star icon that appears when you hover over the entity.
5. Create the set of fields that should be extracted from the CSV file (so that the columns that are in the CSV match those in the existing Change entity and therefore can be mapped).

Define the Integration entity fields' data types.

1. Right-click on the CHANGE_CSTM name and select **Show Properties View**.
2. In the Properties tab select **Columns**.

3. Select the corresponding data types in the Data Type column, for VARCHAR data type specify the **Length**.

4. In the ID column, the unique key for the Change entity, select 1 in the Business Key column for the ID row and leave the rest empty.

Map the Integration entity fields to the Target entity fields.

1. In the Palette, click **Column Mapping** in the SSI section.

2. Select the ID field in the CHANGE_CSTM entity and drag the arrow to the REFERENCE_ NUMBER column in the CHANGE target entity.

3. The CM – CHANGE Transformation entity opens automatically as the mapped entity.

4. In the same manner, map the CHANGE_CSTM integration entity to the relevant CP – CHANGE Transformation entity.

Create the Source entity.

1. In the Palette, click **New Source Entity** in the Source Entity section and then click to the left from the CHANGE_CSTM Integration Entity to place it.

2. Link the Source Entity to the Integration entity.

3. Click **Source to Integration Relation** in the Source Entity section of the Palette

4. Link the newly created source entity with CHANGE_CSTM integration entity by dragging the arrow from the Source Entity name to CHANGE_CSTM Integration Entity name.

5. The source entity is automatically renamed CM.1.0.GENERIC.CHANGE_CSTM

Specify the data source file in the Source Entity properties.

1. Right-click on the CM.1.0.GENERIC.CHANGE_CSTM source entity and select **Show Properties View**.

2. In the Core tab specify Change.csv in the **Table Name/Join Condition** field.

The next step is to generate the ETL.

Movie: To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

Use Case - End-to-End Data Flow

Movie: To display the movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see "Access Movies" on page 97.

End-to-End Flows

This section describes the major end-to-end flows you must execute to view your scorecards and KPIs in the Dashboard. The flow depends on the type of data source.

This section includes the following flows:

Flow 1: View Data from External Data Sources 77

Flow 2: View your Scorecards and KPIs Based on Alternate Source Data 80

Flow 3: View Data from an External File 82

Flow 1: View Data from External Data Sources

This section presents the high level end -to-end flow you can follow to view your Scorecards and KPIs in the HP IT Executive Scorecard Dashboard. The data displayed in the Dashboard is based on data from:

- HP Application Lifecycle Management (ALM)
- HP Asset Manager (AM)
- HP Business Service Management (BSM) and (Application Performance Management (BSM-APM))
- HP Data Protector (DP)
- HP Insight Control (IC)
- HP Network Automation (NA)
- HP Network Node Manager (NNM)
- HP Operation Orchestration (OO)
- HP Project and Portfolio Management (PPM)
- HP Server Automation (SA)
- HP Storage Essentials (SE)
- HP Service Manager (SM)
- HP Universal Configuration Management Database (UCMDB)

Prerequisite:

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

Perform the integration with the Data Sources:

1. Check the relevant integration documentation for eventual prerequisite steps. For more information, see in the *Content Reference Guide*:

- "Integrate with the ALM Data Source"
- "Integrate with the AM Data Source"
- "Integrate with the BSM Data Source"
- "Integrate with the DP Data Source"
- Integrate with the IC Data Source
- "Integrate with the NA Data Source"
- "Integrate with the NNM Data Source"
- "Integrate with the OO Data Source"
- "Integrate with the PPM Data Source"
- Integrate with the SA Data Source
- Integrate with the SE Data Source
- "Integrate with the SM Data Source"
- "Integrate with the UCMDB Data Source"

2. Select **Admin** > **Data Source Management** then click **Add data source**. Select the relevant data source instance. Fill out the relevant fields and click **Next**.
3. Wait until the activation process is complete.

Run the corresponding ETL.

1. **Select Admin** > **ETL Management**.
2. **Schedule a periodic task.** For details, see "To verify or schedule the run_steps command:" in the *Administrator Guide*.
3. **Create a new ETL work-list for loading new data from sources.** For details, see "To load or resume a batch job:" in the *Administrator Guide*.
4. **Schedule the ETL batch to run once or twice a day.** For details, see "To schedule a batch job:" in the *Administrator Guide*
5. **Check the status of the ETL process to see if it has completed.** For details, see "To view active streams:" in the *Administrator Guide*. You can then drill down for more details. For more details, see "DW ABC Streams Management User Interface" in the *Administrator Guide*.

Review in the Studio KPI library, the out-of-the-box Scorecards, Perspectives, Objectives, and the KPIs

1. Click the **Studio** tab.

2. Click the **Show Trees Side-by-Side** icon in the top right corner of the Active KPIs pane to display the KPI Library pane.

3. Select the relevant Scorecards, Perspectives, Objectives, and KPIs of interest to your organization and drag them from the KPI Library (templates) to the Active KPIs Pane to activate them.

4. You can now run calculations or historical calculations depending on your needs:
   a. In the Active KPIs pane, select the KPI you have modified. Click the **Calculation options** button in the Active KPIs toolbar, and select the **Recalculate** option. In the Recalculate dialog box that opens, select the relevant context and click **Calculate**. For details, see "Recalculate Displayed Values after Configuration Change" in the *Business Analyst Guide*.

   b. In the Active KPIs pane, click the **Calculation options** button in the Active KPIs toolbar, and select:

      i. The **Calculate now** option.In the Calculate Now dialog box that opens, select the relevant context and click **Calculate**. For details, see "Calculate Displayed Values after Configuration Change" in the *Business Analyst Guide*.

      ii. The **Schedule context calculation** option. In the Business Context Calculation Scheduling dialog box that opens, select the schedule. For details, see "Schedule Business Context Calculations" in the *Business Analyst Guide*.

      iii. The **Calculation monitoring** option . In theCalculation Monitoring Dialog Box dialog box that opens, select the schedule. For details, see "Monitor the Calculation and Recalculation Processes" in the *Business Analyst Guide*.

5. Once the calculation is completed, go to the Dashboard and open the relevant out-of-the-box page, or create a new page, select the filter for each component, and view the results. For details, see "Manage Pages" in the *Business Analyst Guide*.

Flow 2: View your Scorecards and KPIs Based on Alternate Source Data

This section presents the high level end -to-end flow you can follow to view data from an alternate data source in the HP IT Executive Scorecard Dashboard.

The data displayed in the Dashboard is based on data from:

The alternate source is an Excel file that includes data from the supported data sources and third-party applications.

Prerequisite:

1. Read the *Executive Scorecard Release Notes* available on the Installation DVD. The document includes release notes, getting started information, and installation and upgrade information.

2. Install Executive Scorecard and run the post-install wizard. For details, see the *Executive Scorecard Installation and Configuration* (interactive document) available on the Installation DVD.

3. Set up the users, permissions, and other general settings. For details, see "Getting Started" in **General Administration** in the online documentation library or in the *General Admin Guide*.

4. Troubleshooting issues are detailed in the *IT Executive Scorecard Troubleshooting Guide* in Excel format.

Perform the integration with an alternate data source:

1. Take the sample files from **< Installation Directory>\agora\Content Packs\ETL\flatfiles\demodata**, create your own according to the rules and save them in the External sources directory (in C:\EXTERNAL).

2. To activate the ALT content pack, go through the automation backend tool. For details, see "The Automation Tool" (on page 1) in the *Administrator Guide*.

3. Wait until the activation process is complete.

For more information, see "Alternate Sources Integration" in the *Content Reference Guide*.

Run the corresponding ETL.

1. **Select Admin** > **ETL Management**.

2. **Schedule a periodic task.** For details, see "To verify or schedule the run_steps command:" in the *Administrator Guide*.

3. **Create a new ETL work-list for loading new data from sources.** For details, see "To load or resume a batch job:" in the *Administrator Guide*.

4. **Schedule the ETL batch to run once or twice a day.** For details, see "To schedule a batch job:" in the *Administrator Guide*

5. **Check the status of the ETL process to see if it has completed.** For details, see "To view active streams:" in the *Administrator Guide*. You can then drill down for more details. For more details, see "DW ABC Streams Management User Interface" in the *Administrator Guide*.

Review in the Studio KPI library, the out-of-the-box Scorecards, Perspectives, Objectives, and the KPIs

1. Click the **Studio** tab.

2. Click the **Show Trees Side-by-Side** icon in the top right corner of the Active KPIs pane to display the KPI Library pane.

3. Select the relevant Scorecards, Perspectives, Objectives, and KPIs of interest to your organization and drag them from the KPI Library (templates) to the Active KPIs Pane to activate them.

4. You can now run calculations or historical calculations depending on your needs:
   a. In the Active KPIs pane, select the KPI you have modified. Click the **Calculation options** button in the Active KPIs toolbar, and select the **Recalculate** option. In the Recalculate dialog box that opens, select the relevant context and click **Calculate**. For details, see "Recalculate Displayed Values after Configuration Change" in the *Business Analyst Guide*.

   b. In the Active KPIs pane, click the **Calculation options** button in the Active KPIs toolbar, and select:
      i. The **Calculate now** option.In the Calculate Now dialog box that opens, select the relevant context and click **Calculate**. For details, see "Calculate Displayed Values after Configuration Change" in the *Business Analyst Guide*.

      ii. The **Schedule context calculation** option. In the Business Context Calculation Scheduling dialog box that opens, select the schedule. For details, see "Schedule Business Context Calculations" in the *Business Analyst Guide*.

      iii. The **Calculation monitoring** option . In theCalculation Monitoring Dialog Box dialog box that opens, select the schedule. For details, see "Monitor the Calculation and Recalculation Processes" in the *Business Analyst Guide*.

5. Once the calculation is completed, go to the Dashboard and open the relevant out-of-the-box page, or create a new page, select the filter for each component, and view the results. For details, see "Manage Pages" in the *Business Analyst Guide*.

Flow 3: View Data from an External File

You can upload data from an external file into the Studio using Context Designer:

1. Upload data in .CSV format using the Context Designer. For details, see "Create and Manage Contexts Using Context Designer" in the *Administrator Guide*.
2. Create KPIs based on the new Context.
3. Calculate the KPIs.
4. Display the calculation results in the Dashboard.

Customization

This section includes:

Customize KPIs 84
Other Customizations 85

Customize KPIs

Executive Scorecard enables you to customize KPIs as follows:

You can:

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

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

Other Customizations

You can also customize the following:

- **Objectives, Perspectives, or Scorecards.** For details, see "Configure an Objective", "Configure a Perspective", "Configure a Scorecard", or "Assign/Unassign KPIs to/from Objectives" in the *Business Analyst Guide.*
- **Dashboard Pages.** For details, see "Add a Page to the Dashboard" or "Configure a Page Layout" in the *Business Analyst Guide*.

How to Find Information

This section includes:

"Documentation Library" below

"Search Help Center" on page 92

"Access the Online Help Pages Relevant to the Currently Displayed UI Page" on page 92

"Send Feedback" on page 96

"Documentation Updates" on page 97

"Access Movies" on page 97

Documentation Library

Executive Scorecard Help Center includes the following documents:

Document	Description	Available Formats	Location
Release Notes	Includes last minute information, fixed issues, and limitations.	PDF	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**
Support Matrix	Describes hardware requirements, software requirements, and supported environments.	PDF	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**
Installation and Configuration	Enables you to select installation and configuration options, and then view or print a customized guide.	HTML (interactive document) PDF	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**

Document	Description	Available Formats	Location
Upgrade Guide	Describes how to upgrade Executive Scorecard to the new version	PDF	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**
Getting Started Guide	Provides useful information for getting up and running with Executive Scorecard.	*Getting Started with IT Executive Scorecard* in PDF format	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**
Administrator Guide	Describes Executive Scorecard Administratio n tasks.	*Administrator Guide* in PDF format	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**
Business Analyst User Guide	Describes how to work with Executive Scorecard Studio and Dashboard to create and activate Scorecards, Perspectives, Objectives, Metrics, and KPIs.	*Business Analyst Guide* in PDF format	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**

Document	Description	Available Formats	Location
Financial Analyst User Guide	Describes how to use the ITFM module to consolidate and allocate planned and actual costs from HP Asset Manager, HP Project and Portfolio Management, and alternate data.	*Financial Analyst Guide* in PDF format	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**
Content Reference Guide	Provides reference information on Contexts (universes), out-of-the-box KPIs and metrics, Web intelligence and operational reports, and integrations with supported data sources.	*Content Reference Guide* in PDF format	DVD Available with the download of 9.40 from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**

Document	Description	Available Formats	Location
Reports Reference Guide	Provides details on the reports that can be displayed in Dashboard in the Web Intelligence Report Viewer and Web Intelligence Static Report Viewer components. A subset of the reports can be displayed in the Xcelsius Reports Viewer component. The finance-related reports can also be displayed in their own pages in the Dashboard.	*Content Reference Guide* in PDF format	DVD Available with the download of 9.40 from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**
Content Extension Guide	Includes information on extending content and developing new content using the Integrated Development Environment (IDE).	PDF	Available from the Executive Scorecard 9.40 in the HP Software Product Manual Site (**http://h20230.www2.hp.com/selfsolve/manuals**).

Document	Description	Available Formats	Location
Open Source and Third Party Software License Agreements	Contains the license information for open source and third-party software included in Executive Scorecard.	PDF	Help Center and DVD
Getting Started with XS for Smartphone	Provides information on viewing Executive Scorecard on a smartphone.	*Getting Started with XS for Mobile* in PDF format	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**
Getting Started with XS for Tablet	Provides information on viewing Executive Scorecard on a tablet.	*Getting Started with XS for Tablet* in PDF format	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**
KPI and Metric List	Provides a list of the out-of-the-box KPIs and Metrics, their description, business motivation, formula, context, and more.	List of KPIs and Entities in Excel format	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**

Document	Description	Available Formats	Location
KPIs, Metrics, and Data Lineage	Provides details about the out-of-the-box KPIs and Metrics, their description, business motivation, formula, context, and more. Also provides the KPIs and Metrics data lineage, in graphical format, that represents the chain of entities, fields, views, tables, and contexts that are used to obtain data from the data source, import it into the Data Warehouse, and calculate the value, status, and trend of the KPI or Metric.	"KPIs, Metrics, Contexts, and Data Source Integrations" on page 22*KPIs, Metrics, and Data Lineage Reference Guide* in PDF format	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**
List of Entities	Provides a list of the available Dimension and Fact entities for the OOTB Data Warehouse Content Packs.	List of Entities in Excel format	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**

Document	Description	Available Formats	Location
Troubleshooting	Provides troubleshooting information, workarounds, and knowledgebase items	Troubleshooting Issues in Excel format	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**
ETL Process and Architectural Overview	Provides a graphic representation of the ETL process and its architecture.	PDF	DVD Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**

Search Help Center

To search Help Center, click the **Search** button at the bottom left corner of the Help Center Home page.

You can search for a single word, multiple words, or a specific combination of words that are always next to each in the same order. To search for a specific combination of words, enter the search words within quotation marks in the **Search** box. For example: “out-of-the-box KPIs”.

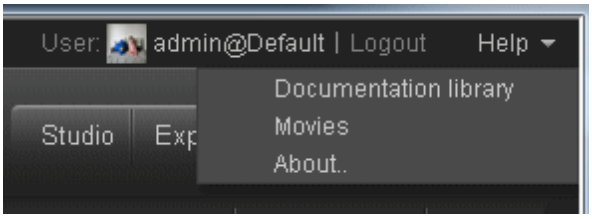
To search for a specific string in a specific Guide, select **Search**, enter the relevant string in the **Search** box, and then select the guide in the **Search filters** drop down list.

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

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

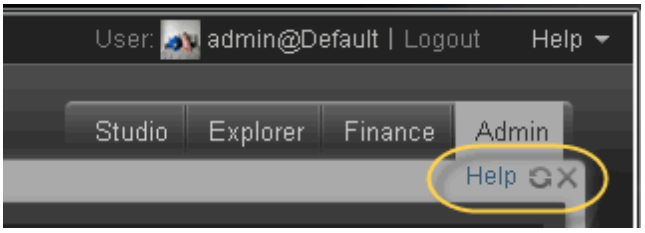
General Online Help

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



Admin tab Online Help

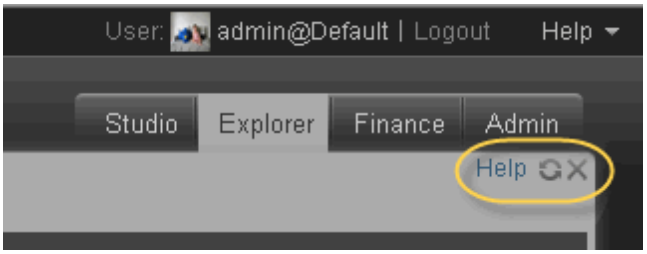
- To access the online help for the relevant page in the **Admin** tab, open the relevant page using the accordion tabs and their menu options, and click **Help** in the top right corner of the page.



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

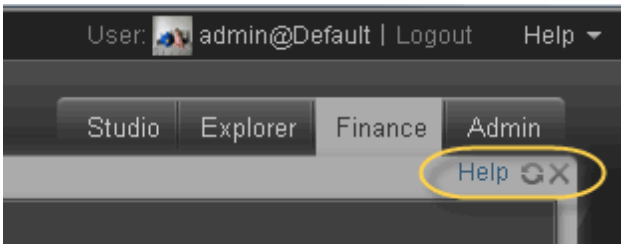
Explorer tab Online Help

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



Finance tab Online Help

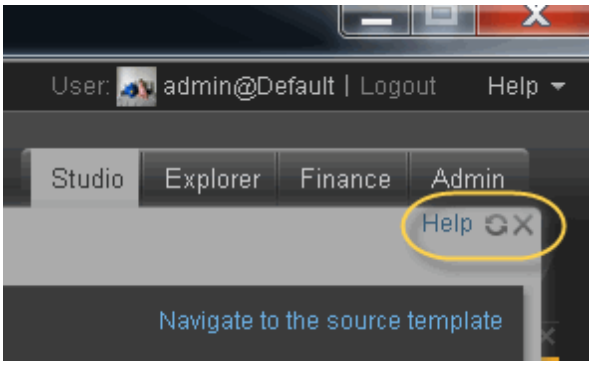
To access the online help in the **Finance** tab, open the relevant page, and click **Help** in the top right corner of the page.



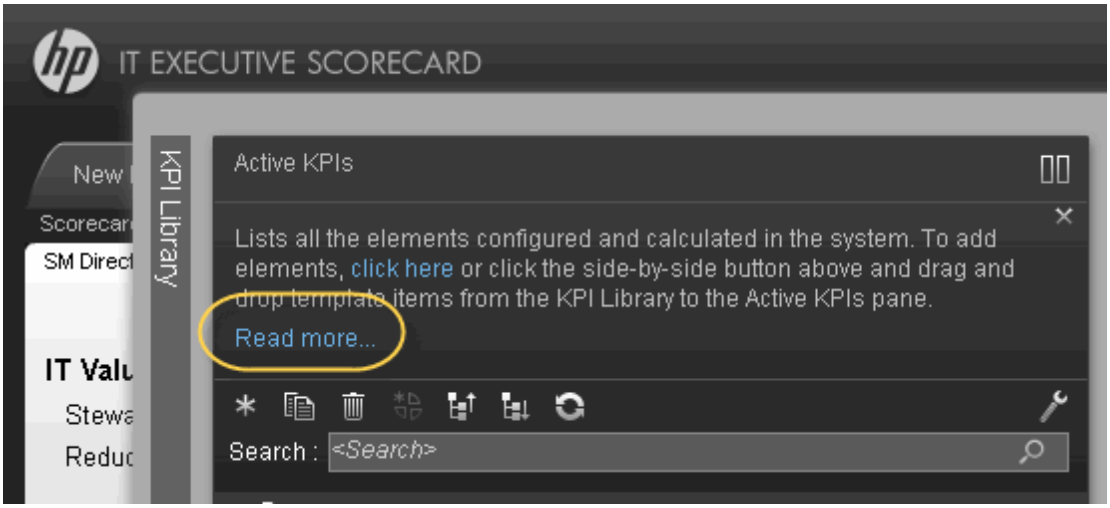
Studio tab Online Help.

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

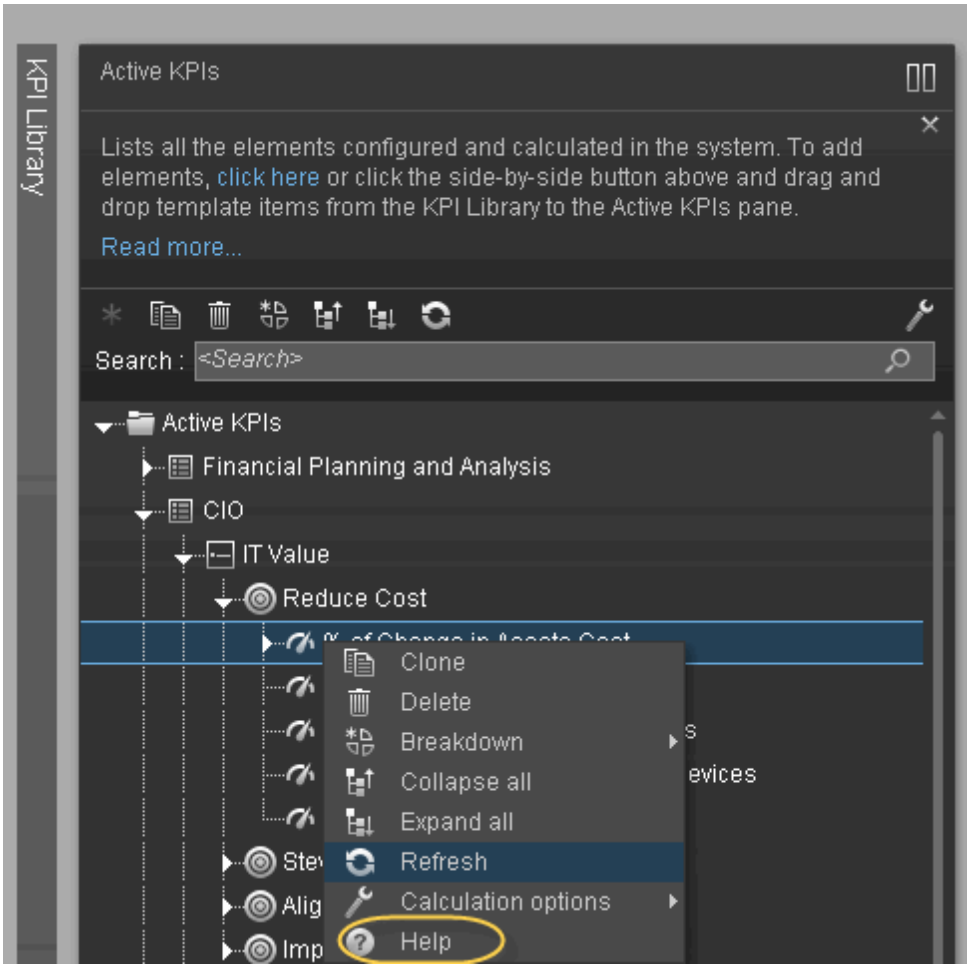
- Click the Studio tab and click **Help** in the top right corner of the page to display general information about the Studio and how to work with it.



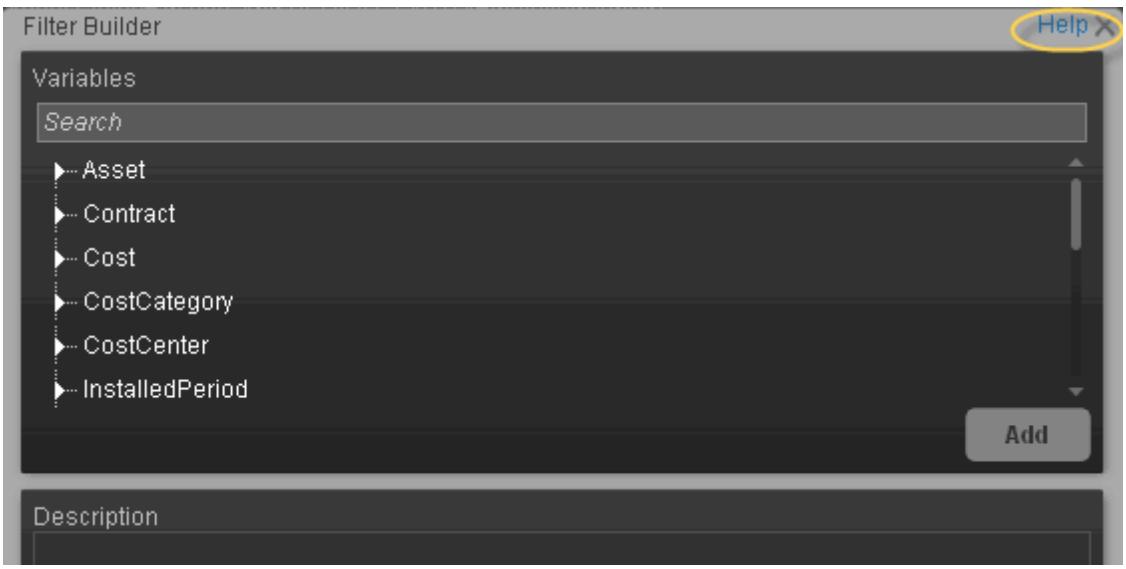
- Click **Read more...** in the top area of the **KPI Library** or **Active KPIs** pane to access the online help for these panes.



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



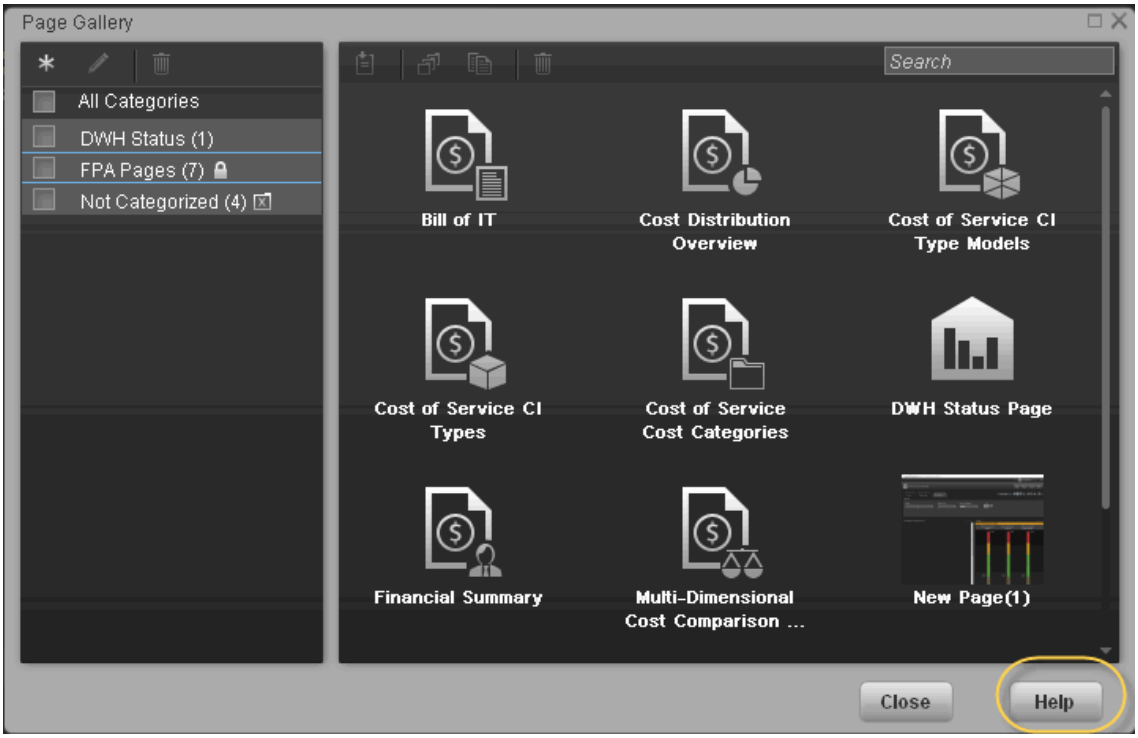
- Click **Help** in the top right corner of the dialog box to display the relevant online help.



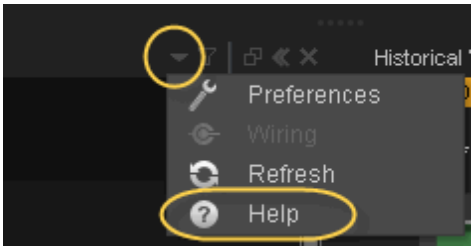
Dashboard Online Help

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

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



- Click the icon in the component toolbar and click the **Help** menu item to display the online help for the component.



Send Feedback

We welcome your comments!

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

Documentation Updates

Executive Scorecard documentation is also available on the HP Software Manuals site.

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

http://h20230.www2.hp.com/selfsolve/manuals

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

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

Or click the **New users - please register** link on the HP Passport login page.

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

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

- Copy the online help to the **<HPXS>\agora\docs\<language_country code>**directory where <language_country_code> is: **en_US** for English language documentation and ja_JP for Japanese language documentation.
- Copy the PDFs to the **<HPXS>\agora\docs\<language_country code>\pdfs** directory where <language_country_code> is: **en_US** for English language documentation and ja_JP for Japanese language documentation.
- Copy the post-install online help to the **<HPXS>\agora\configwizard\docs** directory.

Access Movies

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

1. You need Internet Explorer 9 or Chrome to display the contents..
2. Click **Help** in the top right corner of the application main page and select the **Movies** option.

   The following page opens:

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

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

For details about the movie scripts, see "Common Use Cases" on page 31 in *Getting Started with IT Executive Scorecard*.

We appreciate your feedback!

If you have comments about this document, you can contact the documentation team by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on IT Executive Scorecard, 9.40 Getting Started Guide

Just add your feedback to the email and click send.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to SW-Doc@hp.com.

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