Budget Management

The budgeting tool is a component of IT Financial Management (ITFM) that enables IT finance managers to plan a budget for three different planning time frames: one, two, or three years. The budget tool provides finance managers with these options:

- Define the budget.
- Send notification to all or selected IT cost center managers.
- Enter budget data at the cost center level.
- Check the status of the review process for one or all IT cost centers.
- Review graphical views of consolidated budgets.
- Publish budgets to be used by the allocation module.

To access:

Click the **Finance** tab, and then select **Budget management**.

Learn More

Roles and permissions

- The Budget Coordinator and the Cost Center Manager should have the **BUDGET_COORDINATOR** out-of-the-box role (it includes the **View consolidated budget** and the **Manage cost center budget** permissions).
- The Financial Analyst and CIO/CFO should have the **FINANCIAL_ANALYST** out-of-the-box role (it includes the **Manage Cost Center Budget** , the **View Consolidated Budget**, and the **Manage allocation scenarios** permissions).

For details on the roles and permissions, see Role Functions in the *Administrator Guide*.

Important information

- Depending on the roles and permissions assigned to your user and your role in the organization some of the functionality of this page might be disabled.
- In addition, you might not be allowed to proceed with a step in the life-cycle if the step before that was not completed successfully. For example, you cannot finalize a budget until you have entered budget information.

Life-cycle of a budget

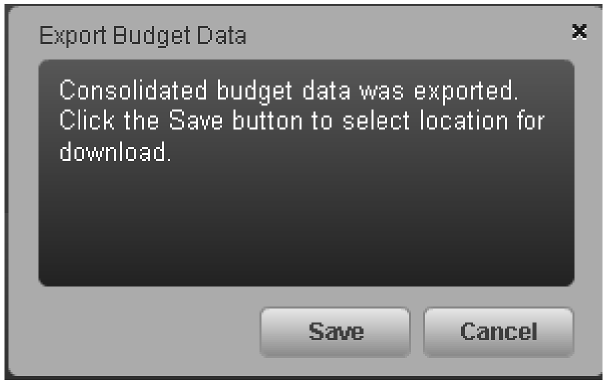
Budgeting includes steps that are performed by different Executives: Budget Coordinator, Cost Center Managers, Financial Analyst, and CIO or CFO as follows:

UI Element	Description

<Cost Center Information>	This is located in the top left-hand corner:
	<Cost Center Name>. The name of the Cost Center budget.
	Category. The category of the Cost Center budget.
	Freq. Select the granularity for the Cost Center budget. To change the values of the budget in the table, the value of the Cost Center Freq. field must be the same as the value of the Budget Frequency in the **Freq.** field in the right-hand corner. You can use the other values of the field to change the view of the budget.
	• **Monthly**. Cost Center Managers can enter budget amounts for each month.
	• **Quarterly**. Cost Center Managers can enter budget amounts for each quarter but cannot edit amounts by months.
	• **Yearly**. Cost Center Managers can enter budget amounts for each fiscal year but cannot edit amounts by months or quarters.
	• **<Table>**:For each Cost Category group:
	  ▪ **Cost Category.** The name of the Cost Category.
	  ▪ **<Column>.** Each column represents the time frame granularity. You can enter the budget in each column. The last row of the table represents the total budget for each time frame and all the categories.

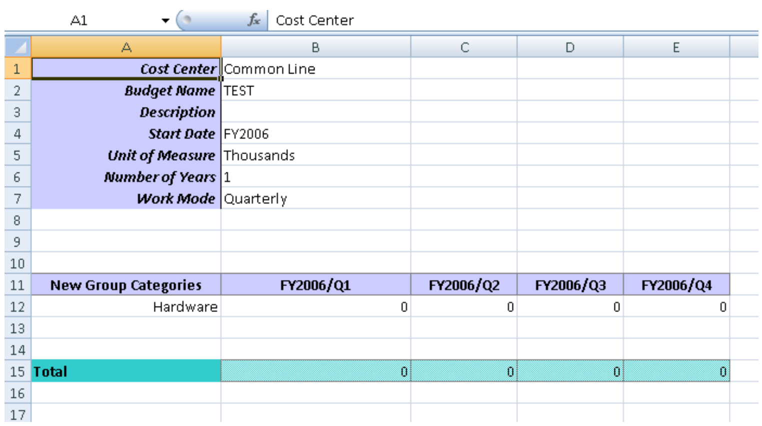
<Graph>	The graph displays the budgets Cost Center budgets for each the time frame granularity
<Budget information>	This is located in the top right-hand corner: **Status.** The status of the Cost Center budget: **Accepted** or **Rejected**. **Freq.** The granularity specified for the budget. This can be: **Monthly**, **Quarterly**, or **Yearly**. **Unit .** The unit of measure for the budget amounts. This can be: **Thousands** or **Millions**.
Import	Click to select the budget (in Excel format) that you want to import. Click either the **Save** or **Complete** button before you import the budget in Excel format. • You can only import a budget for the same Cost Center and Budget. • The only information that can be changed in the Excel file is the data in each column in the Cost Category table. Do not change the values of the other fields.

<table>
<tr><th>UI Element</th><th>Description</th></tr>
<tr><td>Export</td><td>
Click to export the budget to an Excel file. The following dialog box opens:



Click Save to select the location of the file you want to download. The name of the file is, by default, <budget_name>_<Cost_Center_budget_name>.xls. You can rename this file.

The file contents are:



<table>
<tr><th></th><th>A</th><th>B</th><th>C</th><th>D</th><th>E</th></tr>
<tr><td>1</td><td>Cost Center</td><td>Common Line</td><td></td><td></td><td></td></tr>
<tr><td>2</td><td>Budget Name</td><td>TEST</td><td></td><td></td><td></td></tr>
<tr><td>3</td><td>Description</td><td></td><td></td><td></td><td></td></tr>
<tr><td>4</td><td>Start Date</td><td>FY2006</td><td></td><td></td><td></td></tr>
<tr><td>5</td><td>Unit of Measure</td><td>Thousands</td><td></td><td></td><td></td></tr>
<tr><td>6</td><td>Number of Years</td><td>1</td><td></td><td></td><td></td></tr>
<tr><td>7</td><td>Work Mode</td><td>Quarterly</td><td></td><td></td><td></td></tr>
<tr><td>8</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>9</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>10</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>11</td><td>New Group Categories</td><td>FY2006/Q1</td><td>FY2006/Q2</td><td>FY2006/Q3</td><td>FY2006/Q4</td></tr>
<tr><td>12</td><td>Hardware</td><td>0</td><td>0</td><td>0</td><td>0</td></tr>
<tr><td>13</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>14</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>15</td><td>Total</td><td>0</td><td>0</td><td>0</td><td>0</td></tr>
<tr><td>16</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>17</td><td></td><td></td><td></td><td></td><td></td></tr>
</table>

You can open the spreadsheet and enter for each month, quarter, or year, the appropriate amounts for each time period for each cost category.

Follow these guidelines when you edit budget spreadsheets:

Do not add or delete rows or columns.
Do not edit the summary information at the top of the file.
Do not edit column headings.
Edit only the amounts for each time period in the row for each cost category.

Save and close the spreadsheet.

You can then import the modified Excel file.
</td></tr>
</table>

UI Element	Description
	• You can only import a budget for the same Cost Center and Budget. • The only information that can be changed in the Excel file is the data in each column in the Cost Category table. Do not change the values of the other fields.
Reject	As a Budget Coordinator, you can click to reject the Cost Center budget. The status of the consolidated budget changes to **Rejected**.
Accept	As a Budget Coordinator, you can click to accept the Cost Center budget. The status of the consolidated budget changes to **Accepted**. All the Cost Center budgets must be accepted before the consolidated budget they belong to can be published.
Complete	As a Budget Coordinator, you can click to mark the Cost Center budget as **Complete**.The status of the consolidated budget changes to **Complete**. All the Cost Center budgets must be accepted before the consolidated budget they belong to can be published.
Save	Click to save the changes.
Close	Click to close the dialog box without saving the changes.

Consolidated Budget

As a Budget Coordinator, you can view the consolidated budget at any time in the budgeting workflow.

To access:

Select the relevant budget from the list in the Budget Main Page.

Learn More

- Depending on the roles and permissions assigned to your user and your role in the organization some of the functionality of this page might be disabled.
- In addition, you might not be allowed to proceed with a step in the life-cycle if the step before that was not completed successfully. For example, you cannot finalize a budget until you have entered budget information.

Tasks

Main task: "Budget Management" on page 44

This section includes the following tasks:

"Review completed cost center budgets and notify Cost Center managers" below

"Publish the Consolidated Budget" on the next page

"Copy a Consolidated Budget" on the next page

"View the Consolidated Budget" on the next page

Review completed cost center budgets and notify Cost Center managers

You can review and accept or reject completed cost center budgets if you have the **Manage consolidated budget** permission. The Cost Center Manager specifies how much money is needed by the Cost Center and the Budget Coordinator approves or rejects the request.

1. From the main menu bar, click **Finance** > **Budget management**.
2. For each Cost Center budget that you want to review:
   a. Select the relevant budget from the list in the Budget Main Page.
   b. In the Action column click the **Review the budget data for this Cost Center** icon next to the cost center budget that you want to review. The Cost Center Budget View dialog box opens.
   c. Click **Accept** if you want to accept the Cost Center budget. Or click **Reject** if you want the Cost Center manager to make changes.
   d. Click **Notify** to notify the Cost Center manager that the budget status has changed and that they need to make changes. Once the Cost Center manager edits the budget and marks it **Complete**, you have another opportunity to accept or reject it.

Publish the Consolidated Budget

Once you have accepted the consolidated budget, you can publish it so that Financial Analysts can use the budget in allocation scenarios. You can publish the consolidated budget if you have the **Manage consolidated budget** permission.

1. From the main menu bar, click **Finance** > **Budget management**.

2. Click the **Consolidated View** button at the bottom of the page.

   The Consolidated Budget View screen opens.

3. Click **Publish**. The page closes. The budget status changes to **Published**.

Copy a Consolidated Budget

If you have Budget Coordinator privileges, you can copy a consolidated budget to use as a template for new budget.

1. From the main menu bar, click **Finance** > **Budget management**.

2. In the budget list, select the budget that you want to copy and click the **Create a copy of the selected budget** button. The New/Edit Budget dialog box opens with the details of the original budget.

3. Enter a name for the new budget and make the appropriate changes to the fields.

4. Click **Save** or **Finalize**.

View the Consolidated Budget

If you have the **Manage consolidated budget** permission, you can view the consolidated budget at any time in the budgeting workflow. If you have Financial Analyst or CIO privileges, you can view the consolidated budget after the Budget Coordinator accepts or publishes the budget.

1. From the main menu bar, click **Finance** > **Budgets**.

2. Select the relevant budget from the budget list and click the **Consolidated** button

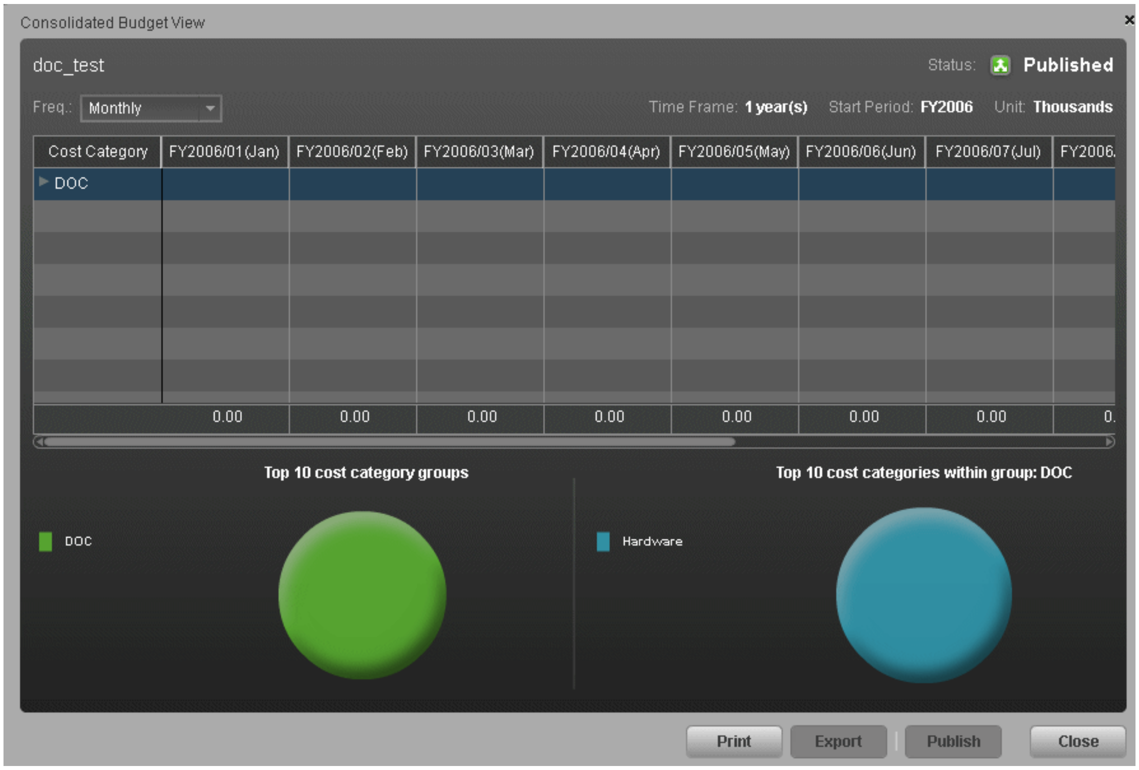
   The Consolidated Budget View screen opens. The pie chart in the lower left part of the screen shows the budget distribution by the top ten cost category groups with the biggest budgets. You can move your mouse pointer over a slice in the pie chart to see the percent of the budget that the cost category group is assigned. The table in the upper part of the page shows the amounts designated for each cost category for all cost centers in the budget.

UI Description

Consolidated Budget View Page

The Consolidated Budget View page enables you to view the consolidated budget or to accept and publish the consolidated budget, depending on your permissions. For details, see Users and Roles in the *Administrator Guide*.

Note: When in Executive Scorecard, you navigate to another tab and then return to the Finance tab, the display is not automatically refreshed. To refresh the display, click the Allocation, Budget, or Cost Explorer tab.



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

UI Element	Description
<Cost Center Name>	The name of the consolidated budget.

UI Element	Description
Status	The status of the consolidated budget: **Draft.** You have just created the budget and clicked the **Save** button in the New/Edit Budget dialog box. **Defined.** You have created the budget and clicked the **Finalize** button in the New/Edit Budget dialog box. **Completed.** All Cost Center managers have moved the relevant Cost Center budget status to **Completed**, the Budget Coordinator has moved the budget that includes all these Cost Centers to **Accepted**, the Budget status becomes **Completed**. **Published.** The Budget has the **Completed** status, and the Budget Coordinator clicks **Consolidated View**, and then clicks **Publish**. The budget status changes to Published and can no longer be modified.
Freq.	Select the granularity you want to use for the budget: • **Monthly**. Cost Center Managers can enter budget amounts for each month. • **Quarterly**. Cost Center Managers can enter budget amounts for each quarter but cannot edit amounts by months. • **Yearly**. Cost Center Managers can enter budget amounts for each fiscal year but cannot edit amounts by months or quarters.
Time Frame	The time frame specified for the budget: 1, 2, or 3 years.
Start Period	The fiscal year that is the start of the budgeting period.
<Table>	The table shows the amounts designated for each cost category for all cost centers in the budget. You can click the groups (Folder icons) to expand the tree of categories. The only cells that are editable are those that correspond to the frequency defined per budget. For example, if the frequency is **Yearly**, then only the columns, which show the yearly total can be edited. There are 4 (quarterly columns) + 12 (monthly columns) in between two yearly columns. There may not be more than 3 yearly columns, these would be the only editable ones.

UI Element	Description
Top 10 Cost Category Groups	The pie chart on the left shows the budget distribution by the top ten category groups with the biggest budgets.
<Right-hand pie chart>	The pie chart on the right shows the top 10 cost categories of the selected group. • You cannot define a budget without defining Cost Category groups. • A budget status can be **Defined** only when at least one Cost Category group has been selected for the budget.
Unit	The unit of measure for the amounts in the budget: **Thousands** or **Millions**.
Print	Click to open a dialog box that enables you to print the Consolidated Budget View details.
Export	Click to export the Consolidated Budget View details.
Close	Click to close the dialog box.
Publish	Click to publish, so the Financial Analysts can use the budget in allocation scenarios.

Cost Explorer

An analysis of costs is crucial to budgeting and planning. The Cost Explorer tool provides an interactive multi-dimensional cost analysis where you can easily change the analytics.

With Cost Explorer, you can do these tasks:

- Define the dimensions and measurements you want to view.
- Save multiple configurations of the same scenario.
- Sort the chart order.
- Filter on all dimensions.
- Filter by currency.
- Email the configuration link to others.

To access:

Click the **Finance** tab and then select Cost Explorer.

Learn More

Configuration

A Cost Explorer configuration contains settings that you can define to display chart views of your scenario. You can define multiple configurations for your scenario to provide different views. You can easily change the chart views to provide additional analytics.

Measurements

Cost Explorer enables you to compare cost measurements that provide information about the variance between planned and actual costs. Cost Explorer validates which measurements you can compare.

The analysis can include these measurements:

- Current sum of plan and actual, which is the latest displayed period in the chart.
- Cumulative sum of plan and actual, which contains the amount of all the displayed periods.
- Variance value, which compares the planned and actual costs.
- Percent variance of actual and cumulative values.
- Some measurements cannot be combined with other measurements.

Tasks

This section includes the following tasks:

"Use-Case Scenario" on the next page

"Add a configuration" below

"Edit a scenario configuration" below

"Cost Explorer" on the previous page

"View and analyze a configuration" below

"Sort charts" on the facing page

"Add a filter to a configuration" on the facing page

"Open an Allocation Management scenario in Cost Explorer" on the facing page

Use-Case Scenario

For details see, Use Case - ITFM - Analyze Allocation Scenarios Using Cost Explorer in the *Getting Started with IT Executive Scorecard*

Add a configuration

1. Click **Finance** > **Cost Explorer**.
2. Select the relevant scenario in **Select Scenario**.
3. Configure the settings in the Settings tab.

   For details, see "Cost Explorer Page" on the facing page.
4. Click **Update Chart** to view the configuration change results.

   Note: You can click **Update Chart** at any time to view configuration changes.
5. Click to save these settings as a new configuration. Enter the name in the dialog box, and click **Save**.

Edit a scenario configuration

1. Click **Finance** > **Cost Explorer**.
2. Select the relevant scenario in **Select Scenario**.
3. Edit the relevant fields.

   For details, see "Cost Explorer Page" on the facing page.
4. Click **Update Chart** to view the configuration change results.
5. Click to save these settings.

View and analyze a configuration

1. Click **Finance** > **Cost Explorer**.

2. Select the relevant scenario in **Select Scenario**.

3. Click **Update Chart** to display the configuration and analyze it.

Sort charts

1. Click **Finance** > **Cost Explorer**.

2. Select the relevant scenario in the **Select Scenario** drop down list.

3. Choose a view to **Sort Charts By** from the drop-down list. This displays the charts in your order of preference.

4. Click **Update Chart** to view the sort results.

5. You can now save the changes.

Add a filter to a configuration

1. Click **Finance** > **Cost Explorer**.

2. Select the relevant scenario in **Select Scenario**.

3. Select a configuration in the **Configuration** drop-down list.

4. On the **Filters** tab, choose a dimension from the drop-down list and check or uncheck one of the values.

5. Click **Update Chart** to view the results.

6. You can now save the changes.

Open an Allocation Management scenario in Cost Explorer

1. Click **Finance** > **Allocation Management**.

2. Select the relevant scenario in **List of Scenario**. The scenario status must be **Completed**.

3. Click **Test in Cost Explorer**.

   The Cost Explorer page opens in context. You can now view and analyze the scenario.

4. Click **Back to Allocation** to return to the Allocation Management page in context.

UI Description

Cost Explorer Page

The Cost Explorer page enables you to interactively view and filter allocation results in the form of charts that show variance between planned and actual costs, as well as easily configure the chart views.

> **Note:** In Executive Scorecard, if you navigate to another tab and then return to the Finance tab, the display is not automatically refreshed. To refresh the display, click the Allocation, Budget, or Cost Explorer tab.

<Top Area>

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

UI Element	Description
Select Scenario	Select the scenario you want to analyze, and for which you want to display the results of the allocation. When you change the selection, the graphs are updated. This dropdown list is displayed when you access Cost Explorer by clicking Finance > Cost Explorer.
Back to Allocation	The button is displayed, when you open Cost Explorer from within the Allocation Management page. Click the button to return, in context, to the Allocation Management tab.

<Left Pane>

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

UI Element	Description
<Configuration>	Select the relevant configuration. A configuration is a set of selected Y-Axis, X-Axis, and Measurements.
	**Save.** Click to save the configuration.
	**Save as.** Click to save the configuration under a different name. The following dialog box opens. Enter the name of the configuration and click Save. 
Update Chart	Click to display the graph once you have selected the configuration you want to analyze. When you change the selection, the currency filter, the sorting or the filters, and you click the Upgrade Chart button the graphs are updated. You can click **Update Chart** at any time to view configuration changes.

Settings Tab

- **Group by Dimension**

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

UI Element	Description

Y-Axis	Select the relevant dimension. You can select up to 3 dimensions. The dimensions are grouped in the graph. When you use the grouping option, more than one graph is displayed. **Note:** You can use the default dimensions provided in the Finance tab to create your allocations and costs. You can also add your dimensions to the FinancialManagement context and base your allocations and costs on these dimensions. You can also rename the existing dimensions to better reflect your financial environment. These new dimensions or renamed dimensions are listed in this field. For details, see Integration with HP Project and Portfolio Management (PPM) and Impact on ITFM in the *Administrator Guide*.
X-Axis	Select the relevant dimension.The default is **Fiscal Month**. **Note:** You can use the default dimensions provided in the Finance tab to create your allocations and costs. You can also add your dimensions to the FinancialManagement context and base your allocations and costs on these dimensions. You can also rename the existing dimensions to better reflect your financial environment. These new dimensions or renamed dimensions are listed in this field. For details, see Integration with HP Project and Portfolio Management (PPM) and Impact on ITFM in the *Administrator Guide*.

- **Measurements**

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

UI Element	Description
Measurement 1/2/3	Choose up to three measurements from the drop-down lists. The default measurements are **Plan** and **Actual**. The measurements can be: **Actual**, **Plan**, **Variance to Plan**, **%Variance**, **Cumulative Actual**, **Cumulative Plan**, **Cumulative Variance**, **Cumulative % Variance**. Each measurement is displayed in the graphs using the color indicated in the list of measurements. Some measurements cannot be combined with other measurements.

- **Sort Charts By**

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

UI Element	Description
Sort By	Select a view from the drop down list. This displays the charts in your order of preference: **Alphabetical**, **Cumulative Actual**, **Cumulative Plan**, **Cumulative Variance**, **Latest Period Actual**, **Latest Period Plan**, **Latest Period Variance**, **Latest Period % Variance**, **Maximum Actual**, **Maximum Plan**, **Maximum Variance**, **Maximum % Variance**, **Cumulative % Variance**. If all charts have the same sorting score, the charts are sorted alphabetically.

- **Filter Costs by Currency**

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

UI Element	Description
Show All Costs	Select to display all the costs. This is the default.
Show Costs Subset	Select a specific currency to display only the costs using the selected currency. If no cost exists in the selected currency, the graph is empty.

- **Scale**

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

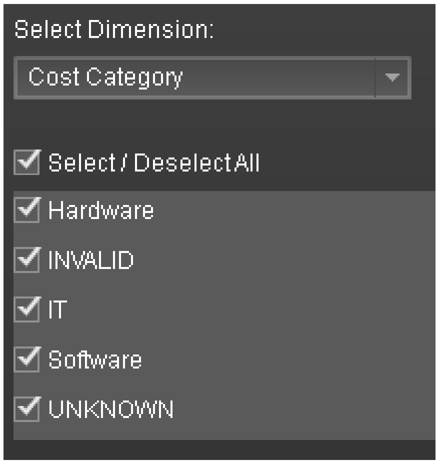
UI Element	Description
Scale	Select the currency scale from the drop down. This can be: **Thousands**, or **Millions**.

Filters Tab

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

<table>
<tr><th>UI Element</th><th>Description</th></tr>
<tr><td>Select Dimension</td><td>Select the dimension you want to display in the graph.

When you select a dimension, its values are displayed below. Select the values you want to display in the graph. The values that you did not select are filtered out.

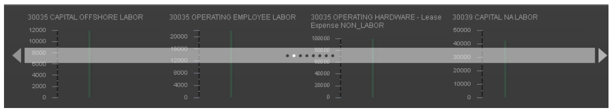
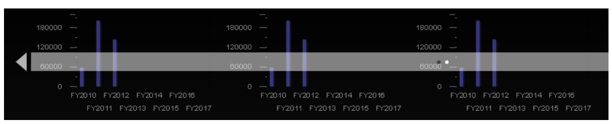

</td></tr>
</table>

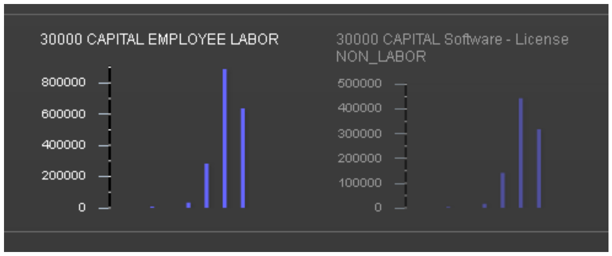
<Right Pane>

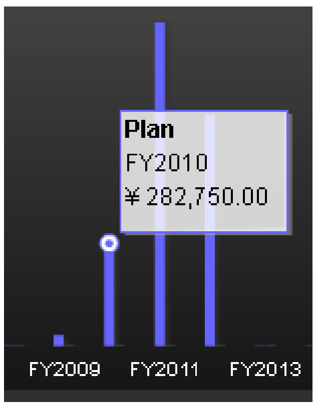
User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets):

UI Element	Description

<List of thumbnail graphs>	The top section of the graph displays a Rolodex list of thumbnail graphs. Each graph displays for each selected value of the third dimension, for each selected value of the second dimension, and for each selected value of the first dimension you selected in the Y-Axis, bars that represent the values of the selected measures for each value of the selected item in X-Axis. Only 4 thumbnails are displayed if the left pane is open. Up to 6 thumbnails can be displayed if the left pane is closed. For example, if you select: • Customer for the first dimension, and the Customer values of **A** and **B**. • Second dimension Budget Line and the Budget Line values of **Admin Software/Q1**, **Admin Software/Q2**, **Admin Software/Q3**, **Admin Software/Q4** • X-Axis is **Fiscal Year**. • Measures are **Actual** and **Planned**. The top graph displays thumbnail graphs. The graph display the value of Actual and Planned for each Fiscal Year for: • Budget Line: **Admin Software/Q1** - Customer: **A** • Budget Line: **Admin Software/Q2** - Customer: **A** • Budget Line: **Admin Software/Q3** - Customer: **A** • Budget Line: **Admin Software/Q4** - Customer: **A** • Budget Line: **Admin Software/Q4** - Customer: **B** • Budget Line: **Admin Software/Q1** - Customer: **B** • Budget Line: **Admin Software/Q2** - Customer: **B** • Budget Line: **Admin Software/Q3** - Customer: **B**

	Use the arrows to scroll between the thumbnails. When you get to the leftmost thumbnail, the left arrow disappears. When you get to the rightmost thumbnail, the right arrow disappears. The screen dot slider shows the screen or page where you are in the list of thumbnails using dots on the white ribbon. 
<Page indicator>	When the Rolodex component includes more than one page, to see what page is currently displayed, move the mouse over the arrow (right or left) to display a white ribbon with dots. The white dot indicates the page that is currently displayed (in the example, the second page) and the black dots indicate the number of other pages in the component (one black dot per page). The order of black and white dots indicates the location of the current page in the component. 
<Bottom graph>	Click a thumbnail to display its expanded graph in the <Bottom graph> area.
<Legend>	The legend displays the measures you selected in the configuration and the colors associated with them.

<table>
<tr><td><Main Graph></td><td>The main graph displays an expanded version of the graph you selected in the <List of Thumbnail Graphs>. The selected thumbnail is highlighed, for example see the left thumbnail below.


Hover the mouse over a bar to display the values of the X-axis and Y-axis of the bar in a tooltip.


If the configuration you selected displays too many bars to make the graph understandable, bars may be skipped.</td></tr>
</table>

View the Financial Performance of Your Organization

You can view the financial performance of your organization using the following Dashboard pages:

- The Cost Distribution Overview page in the Dashboard provides an organization's CIO, IT Financial Manager, IT Financial Analyst, and IT Manager with a view of how their business services, organizations, customers, and programs are doing from the perspective of staying within their defined financial Plan of Record (PoR). For details, see Cost Distribution Overview Page in the *XS Reports Reference Guide*.

- The Financial Summary Page in the Dashboard provides an organization's CIO, IT Financial Manager, IT Financial Analyst, and IT Manager with a view of how their business services, organizations, customers, and programs are doing from the perspective of staying within their defined financial Plan of Record (PoR). For details, see Financial Summary Page in the *XS Reports Reference Guide*.

- You can use the Bill of IT Web Intelligence (Webi) report to display the cost of each one of the top 10 business services used by the selected customer during the selected fiscal year. The top 10 business services correspond to the business services with the highest cost. When you refresh the data in the report, you are prompted for the customer name and the fiscal year.For details, see Bill of IT in the *XS Reports Reference Guide*.

- You can use the Cost of Service Cost Categories Web Intelligence (Webi) report to display, per selected fiscal year, and per selected business service, the cost breakdown by cost category. When you select the report, you are prompted for the business service and the fiscal year. For details, see Cost of Service Cost Categories Page in the *XS Reports Reference Guide*.

- You can use the Cost of Service CI Types Web Intelligence (Webi) report to display, per selected fiscal year, per selected business service, and per selected cost category, the cost breakdown by CI Type. When you select the report, you are prompted for the business service, the fiscal year, and the cost category. The cost categories are: Hardware, Software, and Licenses. For example, the Hardware cost category may include different CI Types: Computer, Printer, or Server. For details, see Cost of Service CI Types Page in the *XS Reports Reference Guide*.

- You can use the Cost of Service CI Type Models Web Intelligence (Webi) report to display, per selected fiscal year, business service, cost category, and CI Type, the cost breakdown by Fiscal Year, Business Service, Cost Category, and Model. When you select the report, you are prompted for the business service, the fiscal year, the cost category, and the CI Type. The cost categories are: Hardware, Software, and Licenses. For example, the Hardware cost category may include different CI Types: Computer, Printer, or Server. Each CI Type includes several Models.For details, see Cost of Service CI Types Models Page in the *XS Reports Reference Guide*.

- You can use the Multi-Dimensional Cost Comparison Analysis Web Intelligence (Webi) report to display, in separate graphs and tables, for each quarter of the selected fiscal years, for the selected Customer/Business Service/Organization/Supplier: The variance in amount between the planned and actual costs of each one of the 10 Customers/Business

Services/Organizations/Suppliers with the highest variance for the selected time period. The variance in percentage between the planned and actual costs of each one of the 10 Customers/Business Services/Organizations/Suppliers with the highest variance for the selected time period.The actual cost of each one of the 10 Customers/Business Services/Organizations/Suppliers with the highest actual cost for the selected time period.The planned cost of each one of the 10 Customers/Business Services/Organizations/Suppliers with the highest planned cost for the selected time period. For details, see Multi-Dimensional Cost Comparison Analysis Report in the *XS Reports Reference Guide*.

Tasks

Use-Case Scenario

For details see, Use Case - ITFM - Analyze, in the Dashboard, Financial Data Based on an Allocation in the *Getting Started with IT Executive Scorecard*

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