

# HP IT Executive Scorecard

For the Windows® operating system

Software Version: 9.41

## Business Analyst User Guide

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# Getting Started with Business Analysis

HP IT Executive Scorecard is a strategy enabler that enables executives to continuously improve their business by measuring what happened and what is happening, analyzing that information, and planning new strategies using the gathered information. This enables a better strategy execution resulting in a reduction of cost and risk, and an increase in quality and value.

## Getting Started with the HP IT Executive Scorecard Studio and Dashboard

The following topics provide the main steps to follow to get started with the Studio and the Dashboard:

1. Learn about how the Executive Dashboard can help the challenges facing Executives. For details, see ["Learn About the Executive Dashboard" on page 10](#).
2. Make sure the HP IT Executive Scorecard settings are configured. For details, see [Scorecard](#) in the *IT Executive Scorecard Administrator Guide*.
3. Make sure the HP IT Executive Scorecard users and permissions are configured. For details, see [User Management](#) in the *IT Executive Scorecard Administrator Guide*.
4. Create and activate Scorecards, Perspectives, Objectives, Metrics, and KPIs. For details, see ["Create the Executive Dashboard Contents in the Studio" on page 35](#).
5. Enrich the Dashboard contents with Metric Breakdowns and KPIs, overrides, Cascading Scorecards, and more. For details, see ["Enrich the Dashboard Contents in the Studio" on page 159](#).
6. Review the out-of-the-box Executive pages, add components to pages, create your own components, or create your own pages. For details, see ["Dashboard Display" on page 185](#).
7. The Executive user can now view and analyze the relevant business objectives. For details, see ["View and Analyze the Business Objectives" on page 353](#).
8. Perform the maintenance of HP IT Executive Scorecard. For details, see [Getting Started with Administration Tasks](#) in the *IT Executive Scorecard Administrator Guide*.

# Learn About the Executive Dashboard

This section describes some of the Executive Scorecard concepts:

["Executive Personas and their Business Challenges" on the next page](#)

["Contexts and Universes - Semantic Layer" on page 12 in the \*IT Executive Scorecard Administrator Guide\*](#)

["IT Data Model" on page 13](#)

["Scorecards" on page 15](#)

["Balanced Scorecards" on page 16](#)

["Perspectives" on page 19](#)

["Objectives" on page 20](#)

["KPIs and Metrics" on page 21](#)

["KPI and Metric Formula and Filter, Threshold, Value, Trend, and Score" on page 22](#)

["Folders" on page 26](#)

["The Scorecard KPI Engine" on page 27](#)

["HP IT Executive Scorecard Architecture" on page 28](#)

["The Executive Scorecard Solution" on page 29](#)

["Executive Scorecard Components" on page 33](#)

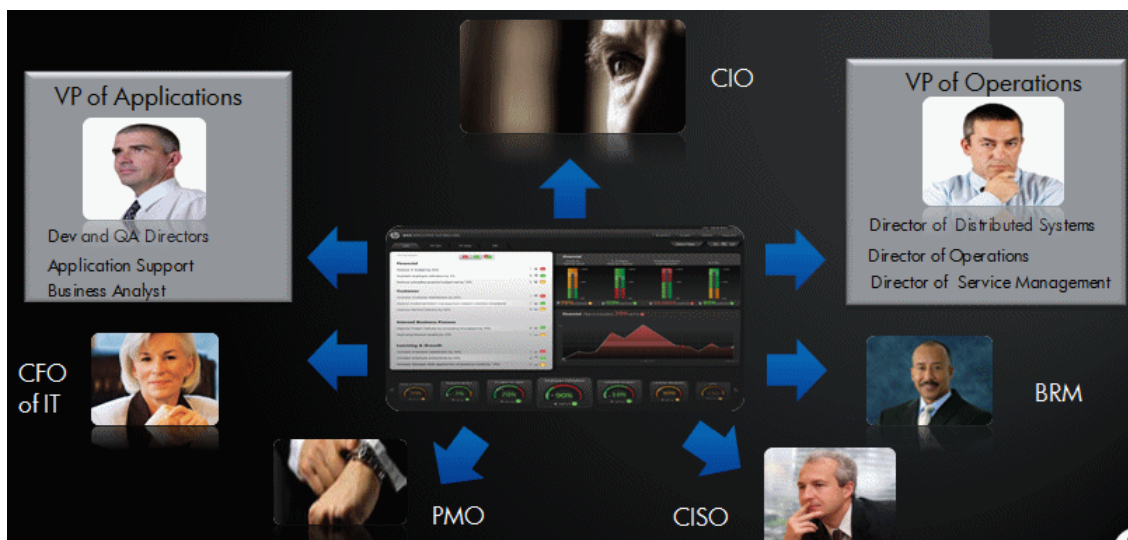
["Executive Dashboard Capabilities" on page 34](#)

# Executive Personas and their Business Challenges

The Dashboard is part of the HP IT Executive Scorecard agenda. It provides the IT executives with the capability to measure the performance of their IT organization.

## Executive Personas

The figure below represents the executive personas who are potential users of the Dashboard. These personas represent potential roles and not necessarily individuals; in some enterprises a single individual may combine several personas or a persona may be split among several individuals. In addition, the names of personas are merely labels of convenience; what is important is the definition of the persona.



**Example** Major US corporations, particularly in the financial services and media industries, have as similar structure with a CIO per Business Unit and Operations & Infrastructure centralized in a shared services organization. In such a structure, one of the responsibilities of the Business Unit CIO is the Application Development for the business unit. The same Business Unit CIO uses the shared services from Operations in support of the Business Unit live applications. In such a configuration, the CIO is likely to want to see a dashboard that covers only these items as well as the same information through a full-lifecycle Business Service (or Application Service) lens, seeing Application Development and Operations as lifecycle stages of a single Business Service entity.

# Contexts and Universes - Semantic Layer

Executive Scorecard semantic layer includes Contexts and universes.

The Context Designer feature enables you to create and manage Contexts (universes). The Contexts can be based on your target schema tables or on .CSV files that can be uploaded to the target schema using the Data Loader.

Context Designer can be used to upload data and create contexts based on the data, when you want to work with the Executive Scorecard and IT Financial Management applications without using Data Warehouse and SAP BusinessObjects Enterprise. It is a direct way to upload data into the Executive Scorecard Studio using files without performing integrations to external sources or to other HP products. It can be used, to integrate third party data, testing, or for Proof of Concept (POC) sessions. It can also be used as a component of Executive Scorecard to integrate third party data.

Context Designer provides KPI results based on your real data.

# IT Data Model

A data model is an abstract model that documents and organizes the business data for communication between team members and is used as a plan for developing applications, specifically how data is stored and accessed.

The IT Data Model (also known as the Conceptual Data Model) defines business concepts, entities, terms, facts, and relationships.

The entities used in HP IT Executive Scorecard are based on the IT Data Model (not 100% compliant). The entities are described in the universes. For details, see the relevant universes in one of the following:

- [ALM Data Source - Integration, Associated Contexts, KPIs, Metrics, Data Lineage, and Reports](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Application Lifecycle Management*
- [AM Data Source - Integration, Associated Contexts, KPIs, Metrics, Data Lineage, and Reports](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Asset Manager*
- [AWS Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of Amazon Web Services*
- [AWSCW Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of Amazon Web Service CloudWatch*
- [BSM Data Source - Integration, Associated Contexts, KPIs, Metrics, Data Lineage, and Reports](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Business Service Management*
- [CSA Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Cloud Service Automation*
- [DP Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Data Protector*
- [Hyper-V Data Source](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of Hyper-V*
- [IC Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Insight Control*
- [NA Data Source - Associated Contexts, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Network Automation*
- [NNM Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Network Automation*

- [OO Data Source - Integration, Associated Contexts, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Operation Orchestration*
- [PPM Data Source - Integration, Associated Contexts, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Project and Portfolio Management*
- [SA Data Source - Associated Contexts, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Server Automation*
- [SE Data Source - Integration, Associated Contexts, KPIs, Metrics and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Storage Essentials*
- [SM Data Source - Associated Contexts, KPIs, Metrics, Data Lineage, and Reports](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Service Manager*
- [UCMDB Data Source - Integration and Associated Context](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Universal Configuration Management Database*
- [VCM Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of vCenter Chargeback Manager*
- [Alternate Source Integration](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of Alternate Data Sources*

# Scorecards

A Scorecard is a high-level snapshot (visual summary) of any organizational performance. Scorecards display a collection of Objectives, and assess the performance of the organization by viewing the status of Objectives.

A Scorecard is a way to map and translate complex business information into something that is understandable to everyone. The methodology starts with targets defined by the organization, followed by Scorecard Objectives.

The following table shows how core Scorecard elements relate to key performance questions.

Scorecard Element	Key Performance Question	More Information and Example
Perspective\Strategy	What is the strategy trying to achieve?	<p>For details about Perspectives, see <a href="#">"Perspectives" on page 19</a>.</p> <p>A Scorecard can include one or more Perspectives.</p> <p><b>Example</b> Operational excellence.</p>
Objective	What is the objective trying to achieve?	<p>For details about Objectives, see <a href="#">"Objectives" on page 20</a>.</p> <p>A Perspective can include one or more Objectives.</p> <p><b>Example</b> Increase responsiveness in IT to service requests for PC orders by 20% in 2010.</p>
KPI	How will performance be measured?	<p>For details about KPIs, see <a href="#">"KPIs and Metrics" on page 21</a>.</p> <p>An Objective can include more than one KPI.</p> <p><b>Example</b> Time to order, configure, and install PC.</p>
Threshold	What performance level is required?	24 hours.

Out-of-the-box templates of Scorecards, Perspectives, Objectives, and KPIs are provided. These templates correspond to business elements. For details, see ["Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 54](#).

Active Scorecards, Perspectives, Objectives, and KPIs display real data in the Dashboard. For details, see ["Active KPIs Pane" on page 63](#).

# Balanced Scorecards

A balanced scorecard should translate a business units mission and strategy into tangible objectives and measures.

Balanced scorecards strive to present an immediately comprehensible picture of a complete organizational strategy. This approach recognizes that the different aspects of a business all influence each other. A balanced scorecard examines performance from several critical perspectives.

The balanced scorecards can be a great resource for managing the IT function, as they expose all the perspectives that are crucial to the executive.

Typically, a balanced scorecard depicts the following perspectives:

## **IT value perspective**

The name IT value comes from the motivation to expose the value of IT to the business. It's main role is also to expose to the organization executives the alignment between IT and the business.

The IT value perspective portray the economic results of previous business decisions and actions. Financial metrics generally lag behind actions, and therefore might not necessarily reflect the business as it is run today. However, financial metrics often determine whether a particular strategy is successful.

Financial metrics are often reflective of the stage of a businesses life-cycle (Growth, Sustain, and Harvest). Growth financial requirements may focus on the percentage growth rates in revenues and sales growth rates in target markets, customer groups, and regions. Businesses in the sustain stage may measure return on investment, return on capital employed, and economic value added. Harvest stage analytics are designed to measure the businesses ability to maximize cash flow back to the corporation. Core financial metrics are commonly related to profitability (such as operating income, return on capital employed, and economic value added). Other financial metrics can be related to shareholder values (ROI, and Financial Risk Management) or measurements (revenue growth and mix, cost reduction/productivity improvement, and asset utilization).

Other IT value perspectives can be:

- Any significant forecast can have a real impact on the profitability of the overall enterprise.
- It is important for the executive to always know where the IT stands in relation to the expense forecast.
- Keeping expenses in line with expectations is crucial.
- The executive may be tracking specific cost reduction objectives. A set of financially-oriented objectives and metrics is a critical component of any useful Dashboard.
- How does my spending relate plan versus region.

## **Customer perspective**

This perspective is often the second perspective to be defined when creating a balanced scorecard. This perspective focuses on aligning core customer outcome measurements; satisfaction, loyalty,



retention, acquisition, and profitability to targeted customers and market segments. These value propositions represent the drivers, the lead indicators, for the core customer outcome measurements. “What must the company deliver to its customers to achieve high degrees of satisfaction, retention, acquisition, and, eventually, market share?” Alternate measurements within a customer segment can be either the share of wallet, segment-by-segment, or customer-by-customer. Beyond the core customer metrics, customer value propositions can be organized into three categories; product/service attributes, customer relationship, and image and reputation.

#### **Example**

- Metrics for Product/service attributes could be: service, price, and quality.
- Metrics for Customer relationship could be: delivery to the customer, response and delivery time and customer experience.
- Metrics for Image could be: market share, brand recognition.

### **Operational excellence perspective**

The operational perspective reflects the internal business processes that support the strategy. Once the financial and customer perspectives have been designed, the customer's perspective will define their internal perspective. Typically, customers might not notice these processes directly, but business must excel at these processes to succeed. Looking at these critical business processes with a lean and six sigma lens, consumers of the BSC see supplemental measures of quality, yield, throughput, and cycle time that quantify potential financial and customer objectives such as reducing costs and improving the customer's experience. By removing waste and defects from end-to-end critical business processes, organizations can identify opportunities to mature their processes (sigma level or maturity scales) and reduce risk and cost. Another metric: Break Even Time (BET), can be a useful measurement of the product development cycle. This measurement stresses the importance of productivity while also capturing and comparing productivity. This measurement is an indicator rather than an outcome measurement.

Other perspectives can be:

- Executives must constantly inspect and refine the IT organization's internal processes to ensure efficiency, predictability, and long term scalability.
- Key internal IT processes may include project management, change management, support management, and network management.
- There may also be specific cycle time reduction or quality initiatives tracked at this perspective.
- Objectives and metrics related to internal process improvement are an important part of a executive balanced view of IT maturation.

### **Future orientation perspective**

The future orientation perspective covers the human infrastructure of the organization and is the final perspective to be developed. It comes last because as you define the other strategies and objectives you may determine that there are gaps and opportunities to develop the organization.

This perspective addresses performance indicators that concern employees, systems, and organizational procedures.

The three primary categories within learning and growth are employee capabilities, information systems capabilities, and motivation empowerment and alignment. Three core employee measurements are employee satisfaction, employee retention, and employee productivity. There may be variations on these metrics based on the related strategies.

**Example** Employee productivity may be segmented by types of employees or the ratio of those types could also be supplemental. Opportunities to re-skill the workplace may be additional measures based on new technologies, frameworks, or customer segments. Organizational objectives around learning or skills inventories based on roles could be measured as well. Gaps could result in development or outsourcing opportunities.

Other perspectives can be:

- Investment in people within the IT organization is crucial for the long term success.
- Training in pursuit of technical certification or increased capability is a very good indicator of the level of commitment that management has to the development of IT employees.
- Other key indicators include salary competitiveness, employee satisfaction, and employee turnover.
- Where is my team strong and weak?
- Am I growing staff by moving them around?
- What are the total people resources of IT and how do they divide out for Full Time Employees versus Contractors and for Onshore versus Offshore?

### User-Orientation Perspective

- The executive direct customers are the senior managers of the business units.
- It is very important that the executive be in touch with the customer perspective on IT effectiveness.
- Measuring the reliability of the systems the customers depend upon.
- Support levels, project status, and overall satisfaction ratings should also be measured.
- How is my customers' satisfaction improving over time?
- How are the quantifiable elements of customer service stacking up—SLA, Request, and Projects?
- How well am I managing the customer's money?

# Perspectives

A Perspective represents one of the strategies included in a Scorecard.

Every Scorecard definition includes out-of-the-box definitions as well as Perspectives that include Objectives that are linked to KPIs.

A Perspective represents a group of Objectives that can help the executive track and analyze the relevant business issue.

# Objectives

An Objective represents an overall performance goal that is defined by an executive. An Objective is a heading for a group of KPIs of different types that can represent different aspects of the goal.

**Example** If an executive wants to measure the IT department responsiveness, an Objective that measures different aspects of the responsiveness of the IT department is created.

Each aspect is measured by a different KPI type (for example: PC purchase time, and more). These KPIs provide values, trends, and statuses.

An Objective always shows the status of a performance goal, but does not display a performance actual value. In a typical Scorecard, Objectives show cumulative performance indicators that roll up the scores of KPIs. On a Scorecard, Objectives appear at the top level of a KPI hierarchy.

Objectives should be “SMART” (Specific, Measurable, Action-Oriented, Realistic, and Time Bound). This distinction makes it possible to know if you have met your objective.

**Example** If your Reduce Costs Objective is about cost reduction, your organization may not hit the mark or may go too far. Objectives have both a negative and positive impact on organizational behavior. The “Smarter” your goal, the less variation you will experience in your results. A better objective would be for example, reduce IT operating expenses by 20% in 2011. This new objective gives you a targeted expense to reduce, a percentage goal, a time period and an organization. It meets the criteria and is achievable.

## Parent-child dependency:

An Objective is a parent unit for its KPIs. An Objective uses a specific rule for the calculation of its results. The rule is based on the child KPIs score results. The available parent-child rules are:

- **BEST\_CHILD** – The parent Objective result corresponds to the highest score of its child KPIs score values.
- **WORST\_CHILD** – The parent Objective result corresponds to the worst score of its child KPIs score values.
- **WEIGHTED\_AVERAGE** – The parent Objective result is the average value of its weighted child KPIs score values.

# KPIs and Metrics

## Key Performance Indicators (KPIs) and Metrics

Key Performance Indicators (KPIs) and Metrics reflect and measure key drivers of business value. Value drivers represent activities that, when executed properly, guarantee future success. Value drivers move the organization in the right direction to achieve its stated financial and organizational goals.

**Example** Value drivers might be “high customer satisfaction” or “excellent product quality.”

## Additional information about KPIs and Metrics

A KPI is a Metric, but a Metric is not always a KPI. The key difference is that KPIs always reflect strategic value drivers whereas Metrics represent the measurement of any business activity. Metrics always show a number that reflects performance. KPIs put that performance in context. Metrics are not matched against a threshold.

KPIs reflect how well the organization is doing in areas that most impact financial measures valued by shareholders, such as profitability and revenues.

A KPI evaluates the performance according to expectations. The context is provided using:

1. **Thresholds.** Upper and lower ranges of acceptable performance.
2. **Targets.** Predefined gains, such as 10% new customers per quarter.
3. **Benchmarks.** Based on industry wide measures or various methodologies, such as Six Sigma.
4. **Trend.** The direction of the performance of the KPI, either “up,” “down,” or “static.”

**Example** A metric could be an MTTR (mean time to recover) which measures the average time between the occurrence of a set of incidents and their resolution. An example of a KPI could be an MTTR, which measures the average time between the occurrence of a set of incidents and their resolution, compared to a defined threshold. For example: ‘MTTR less than one hour’.

KPIs measure key drivers of business values using a formula. For details, see ["KPI and Metric Formula and Filter, Threshold, Value, Trend, and Score" on the next page.](#)

KPI templates (out of the box) help you create new KPIs by activating the KPI templates. Metric templates (out-of-the-box) help you create new Metrics by activating the Metric templates. For details, see ["Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 54.](#)

A complete list of KPIs and Metrics is available in [KPI Library in Excel format](#) and in the [KPIs, Metrics, Contexts, and Data Source Integrations](#) in the *IT Executive Scorecard KPIs, Metrics, and Data Lineage Reference Guide*.

# KPI and Metric Formula and Filter, Threshold, Value, Trend, and Score

This section describes the information related to a KPI or Metric:

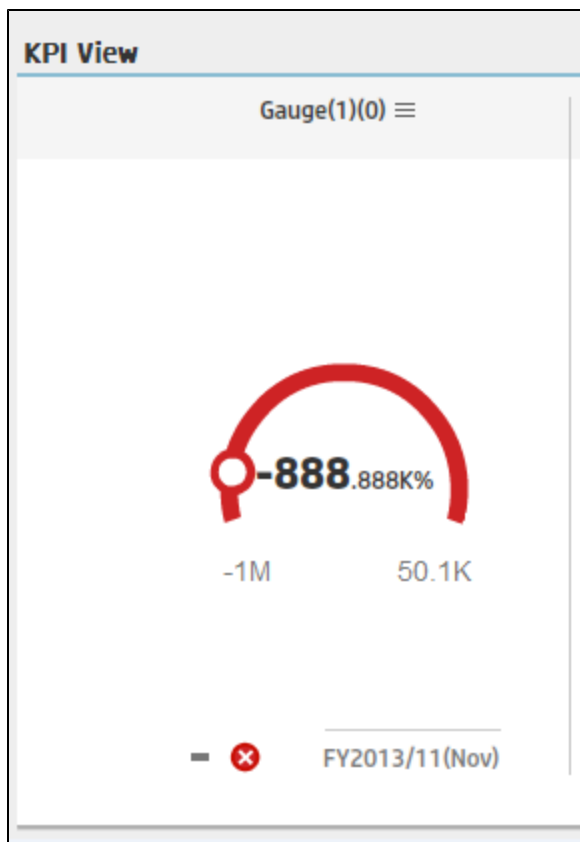
## KPI Formula, Filter, and Value

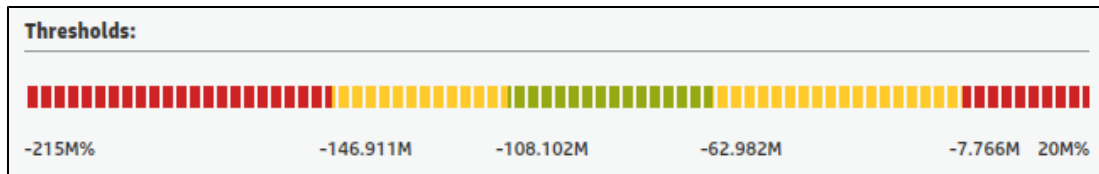
The Scorecard KPI engine calculates the **value** of the KPI using the **formula** specified for the KPI and provides the KPI's **status** and **score** using the thresholds specified for the KPI. You can also build KPI filters to restrict the range of the formula by selecting specific values for the variables used in the formula.

## Decimal Precision

The decimal precision used in displays in Executive Scorecard is as follows:

- **Studio/Dashboard/Explorer Active Tree/Thresholds in Explorer.** The values of KPIs and Metrics are displayed with a maximum of 6 digits and if needed a decimal point. Digits after the decimal point are rounded to 3 digits maximum. Digits before the decimal point are rounded to 3 digits maximum and K, M, or T are used to indicate the correct value. For example: 456.7893 is rounded to 456.789, 3300122.111 is displayed as 3.300 M, or 999999 is displayed as 999.999 K





- **Thresholds in Studio.**

Because the threshold fields in the Studio are where you enter the threshold values, the thresholds display all the digits before the decimal point. Nevertheless, if you configure a KPI threshold with more than 3 digits after the decimal point, they are rounded to 3 digits. For example:



### KPI Threshold

The engine compares the KPI **value** to the KPI **threshold**, and calculates the KPI status.

### KPI Status

The KPI **status** can be **Error**, **Warning**, or **Good**.

### KPI Trend

The trend shows the tendency of a changing KPI result value relative to the previous result.

The trend is:

- **Up** if the current result is higher than the previous result.
- **Down** if the current result is lower than the previous result.
- **Neutral** if the current and previous results are the same.

### KPI Score

The KPI value is translated into a score using the threshold specified for the KPI.

All the **scores** are normalized to the same scale of measurement (for example from 0 to 10) to enable the calculation of an Objective that is based on the **scores** of KPI's from different types. The **score** reflects the **status** of the business **value** and its relative distance from the **threshold**.

In addition:

- All the parent child rule calculations are based on the scores of their children.
- The KPI score represents how well the KPI is doing compared to the business Objective. For details, see "[Objectives](#)" on page 20.

**Example** A KPI calculates a percentage (%) and its thresholds are Good from 90% and up. When the KPI has a value of 90%-100%, the KPI's status is Good. The score for 85% is

higher than the score for 65%, and the score for 97% is higher than the score for 93% even though the status is the same, this enables showing the trend of KPIs and Objectives even if the status remains the same.

The normalization process is based on the user-defined threshold for a metric. KPI thresholds have 3 sectors: good (6.6 - 10), warning (3.3 - 6.6), and error score ranges (0 - 3.3).

The Score calculation process is as follows:

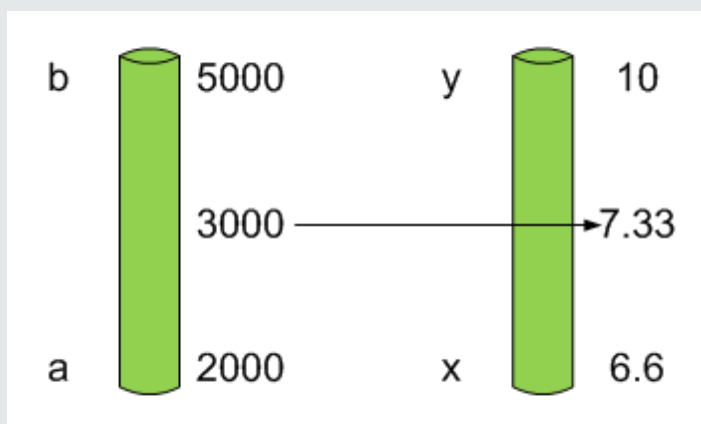
1. Get the KPI result.
2. Get the status range as configured by the thresholds in the KPI definition.
3. Calculate the score as follows:

$$F(n) = ((n - a) / (b - a)) * (y - x) + x$$

where:

- a – minimal value of the threshold range
- b – maximal value of the threshold range
- x – minimal value of according score range
- y – maximal value of according score range
- n – result value

**Example** If a=2000 and b=5000, the Score value is 7.33





**Example** The threshold of a metric similar to MTTR (time to fix a problem) is 1 day for good status, and 7 days for warning status. The score scale is constant: 8-10 is good status, 7-8 is the warning status and 0-7 is error status.

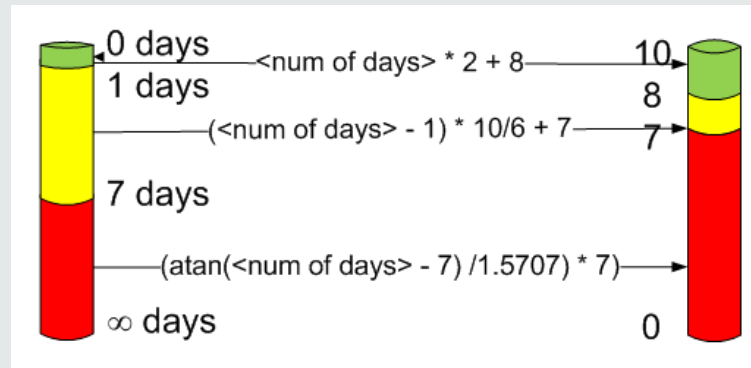
Any value on the MTTR scale needs to be transformed into the score scale by linear or exponential transform. Since the lower threshold is not set (it is equal to  $\infty$ ), the formula is different:

Lets check the Score based on the following Results :

$$0.5 \text{ day} \rightarrow F(1) = ((0.5 - 0) / (1 - 0)) * (10 - 8) + 8 = 9 \text{ (the score is 9)}$$

$$4 \text{ days} \rightarrow F(4) = ((4 - 1) / (7 - 1)) * (8 - 7) + 7 = 7.5 \text{ (the score is 7.5)}$$

$$10 \text{ days} \rightarrow F(10) = (\text{atan}(10 - 7) / 1.5707) * (7 - 0) = 4.43 \text{ (the score is 4.43)}$$



### Metric Formula and Value

The Scorecard KPI engine calculates the **value** of the Metric using the **formula** specified for the Metric. You can also build metric filters to restrict the range of the formula by selecting specific values for the variables used in the formula.

# Folders

Folders are used as containers (organizers) for KPI templates. Folders are populated with either KPI templates or other Folders (not both). The same KPI template can belong to more than one Folder.

You use Folders and their KPIs when you do not work with Scorecards and you want to use the Folder's KPIs to create the Dashboard Contents.

# The Scorecard KPI Engine

The Scorecard KPI engine works with KPIs and Objectives. For concept details about KPIs, see ["KPIs and Metrics" on page 21](#). For concept details about Objectives, see ["Objectives" on page 20](#)

The Scorecard KPI engine discovers data coming from contexts (data sources).

A KPI provides the status of Objectives. The status can be a value, a percentage, or other. The statuses are normalized.

Each KPI receives a score. Depending on the score, the Objective is fulfilled or not.

## Example

If the Objective is Professionalism, the KPIs can be based on the following measurements. An employee is professional when:

- The number of open bugs assigned to the employee should be less than 100 during the measurement period. A Number of Open Bugs with a threshold of 100 measures that objective element. If the employee has 120 open bugs, the Score of the KPI is 80%.
- The employee should create 10 features during the measurement period. A Create 10 Features KPI, with a threshold of 9, measures that objective element. If the employee has opened only 9 features, the score of the Create 10 Features KPI is 90%.
- The employee should take 2 courses during the measurement period. A 2 Courses KPI with a threshold of 1 measures that objective element. If the employee has taken only one course, the score of the Take 2 Courses KPI is 50%.

The score of the Professionalism Objective is the average of the scores of its KPIs: 70%.

Scores can be calculated using one of the following rules:

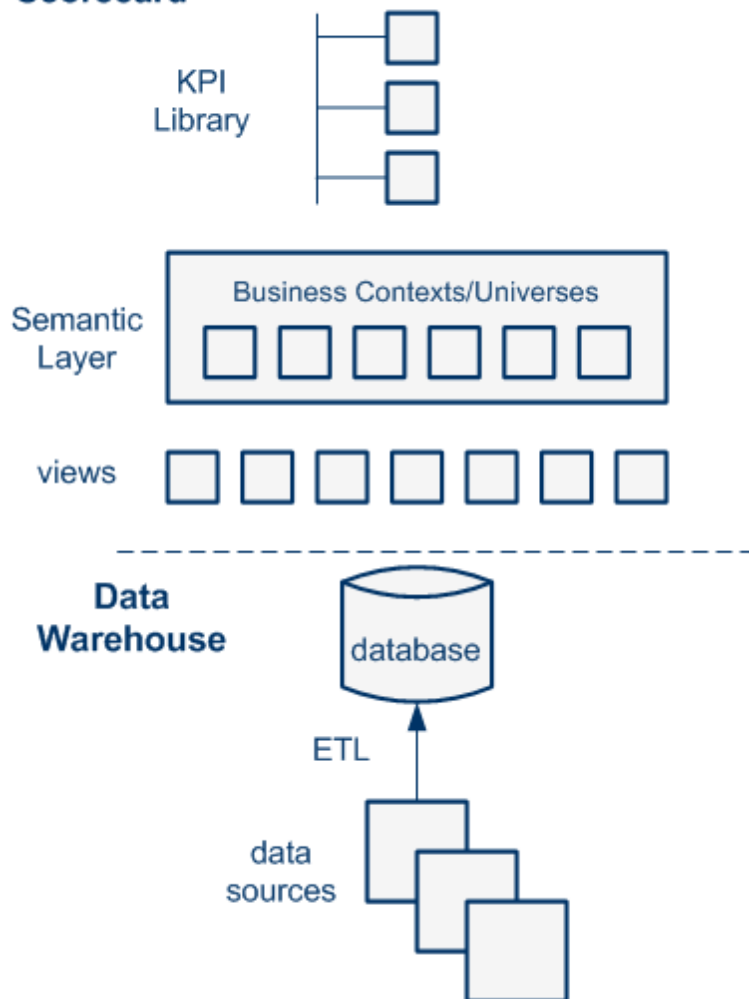
- **Worst child.** The Objective score is the worst score of all the KPIs assigned to the parent Objective (when the Objective has child KPIs) or of the Objectives assigned to the parent Objective.
- **Best child.** The Objective score is the best score of all the KPIs assigned to the parent Objective (when the Objective has child KPIs) or of the Objectives assigned to the parent Objective.
- **Weighted average.** The Objective score is the average of the scores of the KPIs assigned to the parent Objective (when the Objective has child KPIs) or of the child Objectives multiplied by the relevant weights.

# HP IT Executive Scorecard Architecture

HP IT Executive Scorecard is a Java enterprise application. It has a large, web-based application that runs inside of a JEE6 Application Server (glassfish).

A number of open source 3rd party jars are used for the product. These jars are used in the standard Java way by including them in the classpath and accessing them with their published APIs.

## Executive Scorecard



For details on the KPI Library, see ["Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates"](#) on page 54.

For details on the Semantic Layer (Business Contexts or universes), see ["Business Contexts"](#) on page 138.

For details on Data Warehouse, ETLs, and data sources, see [Getting Started with Administration Tasks](#) in the *IT Executive Scorecard Administrator Guide*.

# The Executive Scorecard Solution

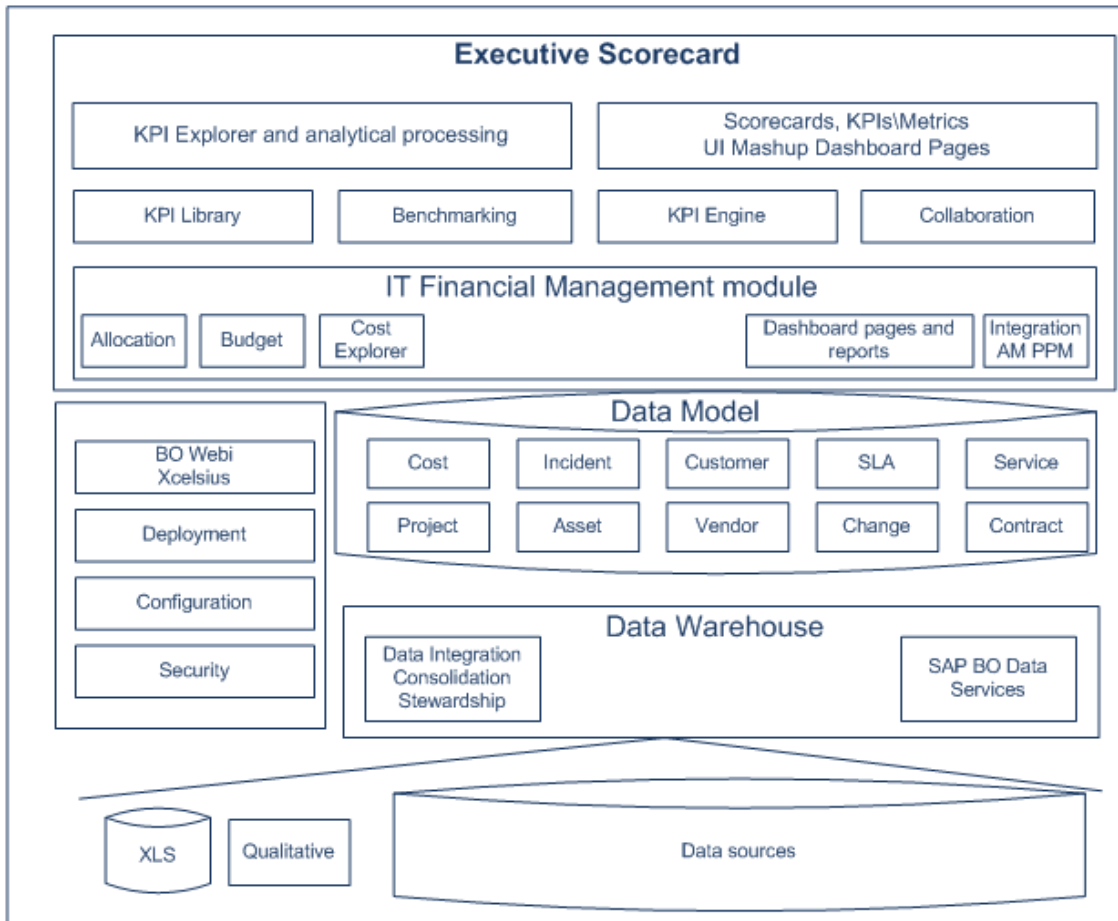
HP IT Executive Scorecard is a strategy enabler.

HP IT Executive Scorecard enables executives to continuously improve their business by measuring what happened and what is happening, analyzing that information, and planning new strategies using the gathered information. This enables a better strategy execution resulting in a reduction of cost and risk, and an increase in quality and value.

HP IT Executive Scorecard provides:

- Performance Measurements (KPIs and metrics) that measure performance and how the IT goals and objectives are met.
- Cascaded Objectives (Scorecards) that provide the means to define IT goals and objectives.
- Actionable insights into performance improvements (KPIs and Data Level Analytics) that increase the performance improvement planning effectiveness via collaboration.
- Actionable insights on the performance measurements that impact the Cascading Scorecards.
- Traceability into the performance measurement and then into the actionable insights.

## HP IT Executive Scorecard Solution



HP IT Executive Scorecard includes a data warehouse with data from some products. The data is gathered and analysis performed to present a set of dashboards and reports with actionable insights for executives such as CIO and VP of Operations.

The data sources of the data warehouse can be HP software products such as HP Business Service Management (BSM), HP Universal Configuration Management Database (UCMDB), Service Level Management (SLM), HP Service Manager (SM), HP Asset Manager (AM) and HP Project and Portfolio Management and more, as well as third party open source products.

The HP IT Executive Scorecard application provides the executive with a tool that enables to measure to which extent their organizations objectives have been achieved and to analyze and decide where to put the effort to improve these objectives.

HP IT Executive Scorecard:

- Is driven by the business personas challenges.
- Is aligned with the IT objectives of these challenges.

- Is based on industry standards: Information Technology Infrastructure Library (ITIL), Control Objectives for Information and related Technology (COBIT), and more.
- Its Key Performance Indicators (KPIs) are based on the IT Data Model.
- Its analytics results are presented in a Dashboard.

## Reporting Strategy

HP IT Executive Scorecard provides:

- Strategic measurements in the HP IT Executive Scorecard Dashboard:
  - Persona-based dashboards
  - Scorecards
  - Cascaded Scorecards
  - KPI Library (templates)
  - KPI engine
- Strategy Analytics:
  - Long term and eagle eye view analytics
  - Executive and decision maker users
  - Based on an IT Data Warehouse
  - Universes compliant with the IT Data Model
  - May correlate multi-products data.
- Operational reports:
  - Real-time or near real-time access to data.
  - Users are the same as the operational product users.
  - Silo reporting solution.



# Executive Scorecard Components

HP IT Executive Scorecard includes several components:

- The **Studio** tab where the administrator creates and manages all the building elements that are used to create the displayed pages and components of the executive Dashboard.
- The **Dashboard** mashup where the administrator configures how to display the information that the executive wants to see. The information is displayed on pages that can include one or more components. The administrator can configure the pages, the components, and the interactions of these components with each other.
- The **Dashboard** display, where the executives can view how well their required objectives are doing, and from where the executive can drill down to subordinates pages to breakdown the information and get a better understanding of the situation.
- The **Explorer** tab, where the executives can view more detailed information about their Objectives and KPIs, and can access other reports or external pages that display other facets of the situation. The executives usually access the Explorer tab in context, by drilling down from the relevant Objectives or KPIs in the Dashboard components.
- The **Finance** tab, where the Executives can use the IT Financial Management (ITFM) tool to consolidate and allocate planned and actual costs from data sources, to budget, and to manage costs more effectively.
- The **Admin** tab, where the administrator selects or configure the relevant settings. For details, see the *IT Executive Scorecard Administrator Guide*.

Depending on their permissions the administrator and the executives can view, manage, or administrate tabs, pages, components, and more.

# Executive Dashboard Capabilities

The Dashboard provides the capabilities to create a specific page for each executive persona to answer the persona's requests and challenges.

## Capabilities

The HP IT Executive Scorecard Dashboard provides the following capabilities:

- **Pages and components.** You can create Dashboard pages using components that can be added to pages. You can use all these components as is or you can customize them to create your customized Dashboard display.
- **Drill down to other pages.** You can create drill downs to other pages, so the executives can cascade to their direct report's pages for a breakdown of the objectives that they measure.
- **Drill down to more detailed information.** You can set up drill downs to more detailed information so the executives can drill down from any element (using pies, bubbles, charts, gauges, scorecard, etc...) in order to perform analytical processing on the critical results.
- **Annotations.** This functionality allows the executives to add notes in the business context of any element that can be viewed later on during strategic planning meeting, or staff meetings.
- **Add wiring.** You can link components using wiring to enable the executives to select a specific element in one of the components and have all the wired components filtered by the selected element.
- **Filter.** You can manage the elements in the components, filter for some elements, change the time frame, and more.

# Create the Executive Dashboard Contents in the Studio

You use the Studio to create and manage all the elements that are displayed on the Dashboard, as well as their interactions with each other: wiring, drill downs, and other features.

The Executive Dashboard includes Scorecards, Perspectives, Objectives, KPIs, and Metrics.

## To access:

Click the **Studio** tab.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on page 39](#) ● ["Create the Executive Dashboard Contents in the Studio" above](#)

## Learn More


### About the Studio

The Studio is the environment you use to build the Dashboard display.

The Studio includes:

- The KPI Library pane that is a repository of the Scorecard, Perspective, Objective, KPI, and Metric templates, and of Folders.
- The Active KPIs pane that shows all the active Scorecards, Perspectives, Objectives, KPIs, and Metrics. You can select to display a subset of these items in the Dashboard.
- The Configuration details tab that presents the configuration of the selected element, and a Calculation tab that presents the calculation configuration of the selected KPI or Metric.

To create the display you must first activate out-of-the-box templates by moving them from the KPIs Library pane to the Active KPIs pane, you can create your own elements directly in the Active KPIs pane, or you can upload and activate a CAP. For task details, see ["Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 54](#), ["Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" on page 59](#) or [Content Acceleration Pack \(CAP\) Management in the IT Executive Scorecard Administrator Guide](#).

**Note:** When in Executive Scorecard, you navigate to another tab and then return to the Studio, the display is not automatically refreshed. To refresh the display, click  in the toolbar of the Active KPIs or KPI Templates pane.

### About Templates

Out-of-the-box templates of Scorecards, Perspectives, Objectives, KPIs, and Metrics are available in the KPI Library pane.

The pane also includes out-of-the-box Folders.

The templates are built to represent the most common business facets of an enterprise.

For details, see ["Templates" on page 42](#).

## About the KPI Library

The KPI Library is part of the Studio. It provides out-of-the-box Scorecard, Perspective, Objective, KPI, and Metric templates, as well as Folders.

Scorecard templates and their contents represent recommendations on the business aspect they represent and the information they should display.

You can use the templates as the basis for active Scorecard, Perspective, Objective, KPI, and Metric that are used to create the Dashboard display and to show data that enables the end-user to see if the enterprise objectives are met or not.

The KPI Library pane can contain several trees. A tree can be a Scorecard tree or a folder tree. A folder tree includes only folders, KPIs, and Metrics.

## About the Active KPIs

The Active KPIs pane is part of the Studio. It contains only one tree that can include the active Scorecards, their Perspectives, Objectives, KPIs and KPI Breakdowns. It also includes the **Public Metrics and KPIs** folder that includes the Metrics, and Unassigned KPIs and their Breakdowns. Unassigned KPIs or Metrics are used when the user does not work with Scorecards, Perspectives, and Objectives.

Active Scorecard, Perspective, Objectives, KPIs, and Metrics are the building blocks of the elements (components and pages) the Executive end-user views in the Dashboard.

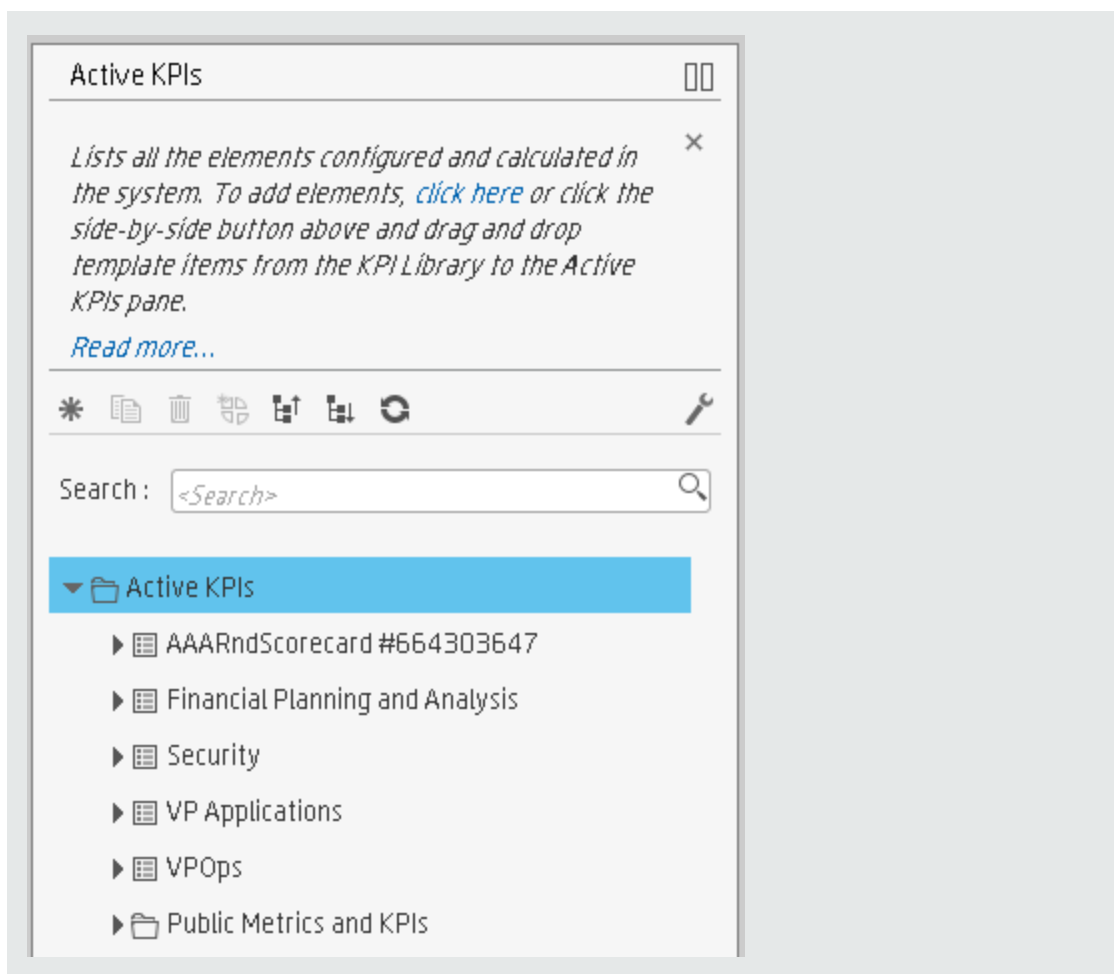
You can add to the pool of out-of-the-box elements that are used to create the Dashboard display, by dragging the relevant Scorecard, Perspective, Objective, KPI, and Metric templates from the KPI Library pane to the Active KPIs pane.

You can modify the active entities in the Active KPIs pane. For task details, see ["Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" on page 59](#).

## About Trees









In the Studio's KPI Library pane or Active KPIs pane, you can view the template or active Scorecards, Perspectives, Objectives, Folders, KPIs, and Metrics organized in **tree** structures.

### Example




The KPI Library pane may include several trees. These trees can include Scorecards, Unassigned KPIs, or Metrics, or Folders. Template KPIs are unassigned when they are not included in any Objective in the relevant Scorecard tree or in any Folder in the relevant Folder tree. So for each Scorecard tree or Folder, the Unassigned KPIs can be different.


The Active KPIs pane includes one tree that can include one or more Scorecard trees as well as the **Public Metrics and KPIs** folder.

Scorecards are indicated by  or . Each Scorecard is in itself a tree that can include some Perspectives (indicated by  or ). Each Perspective includes some Objectives (indicated by  or ). Each Objective includes either child Objectives or KPIs (but not both). KPIs are indicated by  or .

The names of the nodes (Scorecards, Perspectives, Objectives, and KPIs) are unique for the same hierarchical level. "[Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs](#)" on page 59

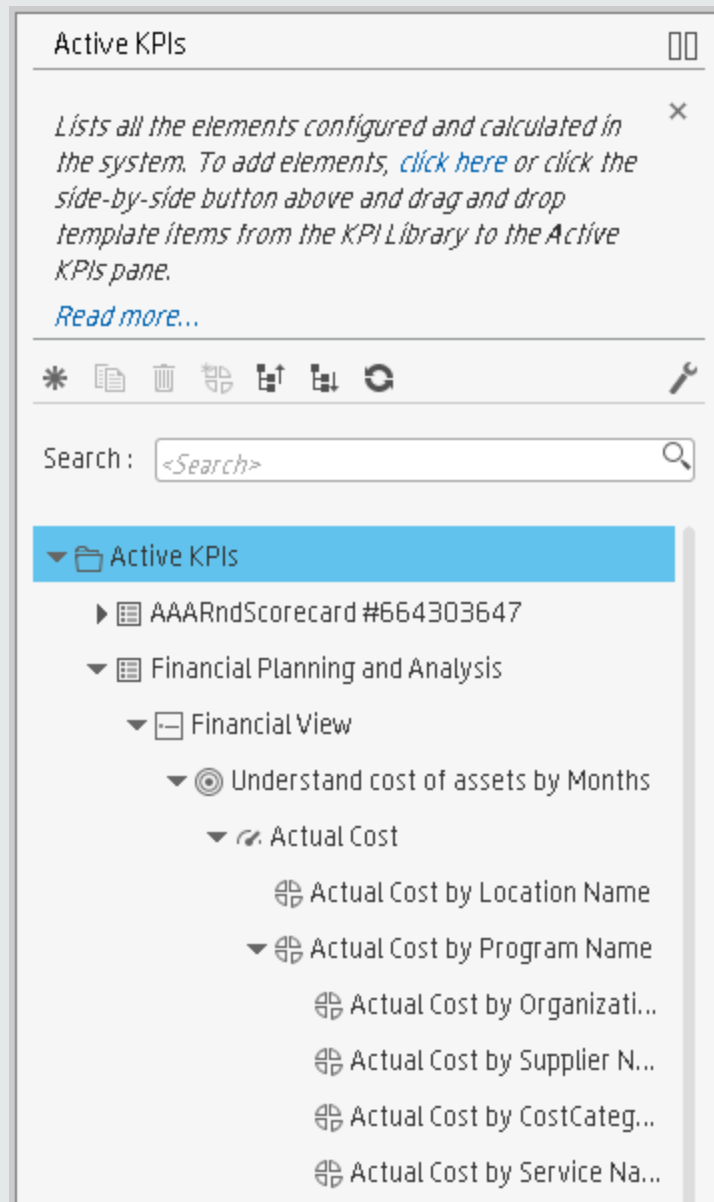
Metrics are indicated by  or .

Each KPI can include KPI Breakdowns (indicated by ) . KPI Breakdowns can also include KPI Breakdowns.

Each Metric can include Metric Breakdowns (indicated by ) . Metric Breakdowns can also include Metric Breakdowns.

**Note:** KPI/Metric Breakdowns can be configured for active KPIs or Metrics; they do not exist in the KPI Library. They are displayed only in the Active KPIs pane. For details, see "[KPI Breakdowns](#)" on page 160.

### Example



In the Active KPIs pane, you can add active KPIs or Metrics, Objectives, and Perspectives to existing Scorecards. For task details, see ["Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs"](#) on page 59.

## Tasks

This task includes the following steps

1. ["Prerequisite - Interview the Dashboard End-User"](#) below
2. ["Import out-of-the-box templates - optional"](#) below
3. ["Activate Scorecards, their Perspectives, Objectives, and KPIs"](#) below
4. ["Customize Scorecards, their Perspectives, and Objectives"](#) on the next page
5. ["Create Active Scorecards, their Perspectives, Objectives, KPIs, and Metrics"](#) on the next page
6. ["Customize KPIs or Metrics"](#) on the next page
7. ["Enrich the Executive Dashboard Display"](#) on the next page
8. ["Calculate for the current period, recalculate for the historical period, or schedule the calculation"](#) on page 41
9. ["Out-of-the-box Dashboard Pages"](#) on page 41
10. ["Prepare the Dashboard Display"](#) on page 41

1. **Prerequisite - Interview the Dashboard End-User**

To design the end-user's scorecards, you must interview the end-user to understand what are his business objectives and see if the out-of-the-box nodes are appropriate or if they should be customized.

For details, see ["Executive Personas and their Business Challenges"](#) on page 11.

2. **Import out-of-the-box templates - optional**

When you start HP IT Executive Scorecard, the out-of-the-box Scorecard, Perspective, Objective, KPI, or Metric templates, Folders, Unassigned KPI or Metric templates, and Dashboard components are automatically imported into the KPI Library pane.

You may want to import additional templates (for example, if you have upgraded to a new version and you want to keep your former templates). For details, see [Migrate Trees, Metrics, and Unassigned KPIs](#) in the *IT Executive Scorecard Administrator Guide*.

3. **Activate Scorecards, their Perspectives, Objectives, and KPIs**

HP IT Executive Scorecard provides out-of-the-box Scorecard templates in the KPI Library. You can drag the out-of-the-box Scorecard templates from the KPI Library to the Active KPIs pane to activate them. In the Active KPIs pane, you can then customize, clone, or create new Scorecards.

You can do the same for Perspective templates, Objective templates, and KPI or Metric templates.

For details, see ["Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 54.](#)

#### 4. **Create Active Scorecards, their Perspectives, Objectives, KPIs, and Metrics**

You can create new active Scorecards, their Perspectives, Objectives, KPIs and Metrics. For details, see ["Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" on page 59.](#)

#### 5. **Customize Scorecards, their Perspectives, and Objectives**

You can customize out-of-the-box Scorecards, their Perspectives, and Objectives. For details, see ["Scorecard Configuration Details" on page 70](#), ["Perspective Configuration Details" on page 75](#), or ["Objective Configuration Details" on page 79.](#)

#### 6. **Customize KPIs or Metrics**

You can customize KPIs or Metrics by:

- Changing a KPI or a Metric configuration. For details, see ["KPI or Metric Configuration and Calculation Details" on page 90.](#)
- Directly creating active KPIs and assigning them to Objectives or creating active Metrics. For details, see ["Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" on page 59.](#)
- Changing their Business Context of a KPI or a Metric. For details, see ["KPI or a Metric Business Context" on page 138.](#)
- Changing the formula used to calculate the KPI or a Metrics. For details, see ["KPI or Metric Formula" on page 104.](#)
- Changing the filter used to limit the range of data used in the calculation of the KPI or the Metric. For details, see ["KPI or Metric Filter" on page 129.](#)
- Change the thresholds to recalculate the status of a KPI. For details, see ["Calculation" on page 143](#) or ["Recalculation" on page 146.](#)

#### 7. **Enrich the Executive Dashboard Display**



You can enrich the Executive Dashboard display by:

- Creating cascading Scorecards that enable the Executive to drill down to lower levels of the same Scorecard. For details, see "[Cascading Scorecards](#)" on page 180.
- Creating breakdowns of KPIs to obtain more detailed information about the KPI's measurements. For details, see "[KPI Breakdowns](#)" on page 160.
- Managing overrides. For details, see "[KPI and Metric Breakdown Overrides](#)" on page 172.
- Adding additional information to the Metric, KPI or Objective. For details, see "[KPI or Objective Additional Information](#)" on page 177.

## 8. Calculate for the current period, recalculate for the historical period, or schedule the calculation

After you complete the customization and enrichment of the Scorecards and their contents, you can either:

- Wait for the automatic scheduled calculation to take place.
- Activate the calculation of the values, statuses, and scores of the Objectives, KPIs or Metrics to display the resulting information in the Dashboard. For details, see "[Calculation](#)" on page 143.
- Activate the recalculation of the values, statuses, and scores of the Objectives, KPIs or Metrics for a historical (past) period to display the resulting information in the Dashboard. For details, see "[Recalculation](#)" on page 146.

You can schedule the calculation of specific business context automatically. For details, see "[Calculation Scheduling](#)" on page 150.

## 9. Out-of-the-box Dashboard Pages

The Executive can view the relevant information on the out-of-the-box pages in the Dashboard. For details, see "[Dashboard](#)" on page 354.

## 10. Prepare the Dashboard Display

You can also create pages, enrich pages with additional components, create components, and wire the components so selecting a specific element in one component impacts the display of other components in the page. For details, see "[Dashboard Display](#)" on page 185.

# Templates

Out-of-the-box templates of Scorecards, Perspectives, Objectives, KPIs, and Metrics are available in the KPI Library pane.

The pane also includes out-of-the-box Folders.

The templates are built to represent the most common business facets of an enterprise.


You can create new templates by importing new templates or updated templates. For details, see ["Import or Export Trees"](#) in the *IT Executive Scorecard Administrator Guide*.

Each template has a unique name.

All the values and thresholds of the Studio KPIs depend on their definition in the Configuration details and Calculation details tabs.

For details about Scorecards, Perspectives, Objectives, Folders, KPIs, and Metrics, see ["The Scorecard KPI Engine" on page 27](#).

## To access:

1. Click the **Studio** tab. If the KPI Library pane is not displayed, click the **Toggle Side By Side** button  in the toolbar of the Active KPIs pane.
2. In the KPI Library pane, select the relevant tree.
3. Click:
  - a. A Scorecard template, Perspective template, Objective template, or click a Folder in the tree to display its Configuration Details area.
  - b. A KPI, Unassigned KPI, or Metric template in the tree and then click either the **Configuration Details** or the **Calculation Details** tab.

Section navigation: ● ["UI Description" below](#)

## UI Description

### Configuration Details Tab for a Scorecard Template

This page displays configuration information for the selected Scorecard template in the KPI Library pane.

The screenshot shows a configuration window with a tab labeled 'Configuration details'. Below the tab is a section titled 'General - Scorecard Template'. There are two input fields: 'Name' with the value 'CIO' and 'Description' with the value 'CIO Scorecard'.

### General - Scorecard Template

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

UI Element	Description
<b>Name</b>	The name of the Scorecard template. <b>Limitations:</b> The maximum number of characters is 240.
<b>Description</b>	The description of the Scorecard. <b>Limitations:</b> The maximum number of characters is 1000.
<b>Id</b>	The Id of the Scorecard. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.
<b>Type</b>	The type of Scorecard. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.

### Configuration Details Tab for a Perspective Template

This page enables you to display the configuration of a Perspective template.

**Configuration details**

---

**General - Perspective Template**

---

\*Name :

Description :

### General - Perspective Template

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

UI Element	Description
<b>Name</b>	The name of the active Perspective template. <b>Limitations:</b> The maximum number of characters is 240.
<b>Description</b>	The description of the Perspective. <b>Limitations:</b> The maximum number of characters is 1000.
<b>Id</b>	The Id of the Perspective. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.
<b>Type</b>	The type of Perspective. It is automatically assigned..  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.

### Configuration Details Tab for an Objective Template

This page displays configuration information for the selected Objective template.

**Configuration details**

**General - Objective Template**

Name:

Description:

Calculation period:

Calculate using:  Note: The weight determines the impact of the KPI on the calculation

**Assigned KPI templates**

Name	Weight
Proposals Backlog	1
Project Scope Changes Backlog	1
Network Latency	1
Downtime % Based on SLAs	1

### General - Objective Template

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

UI Element	Description
<b>Name</b>	The name of the Objective template. <b>Limitations:</b> The maximum number of characters is 240.
<b>Description</b>	The description of the Objective template. <b>Limitations:</b> The maximum number of characters is 1000.
<b>Id</b>	The ID number of the Objective. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.
<b>Type</b>	The type of the Objective. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.
<b>Calculation Period</b>	The calculation period of the Objective template.
<b>Calculate Using</b>	The type of rule to use to calculate the Objective's score according to the scores of its children. You can select: <ul style="list-style-type: none"> <li>• <b>Worst child.</b> The Objective score is the worst score of all the KPIs assigned to the parent Objective (when the Objective has child KPIs) or of the Objectives assigned to the parent Objective.</li> <li>• <b>Best child.</b> The Objective score is the best score of all the KPIs assigned to the parent Objective (when the Objective has child KPIs) or of the Objectives assigned to the parent Objective.</li> <li>• <b>Weighted average.</b> The Objective score is the average of the scores of the KPIs assigned to the parent Objective multiplied by the relevant weights, or if the Objective has child Objectives, the average of the scores of the child Objectives multiplied by the relevant weights. When you select this rule in the Studio, an additional column (<b>Weight</b>) where the user can configure the weight of each child (Objective or KPI) for the weighted average calculation. When you select this value a note is displayed explaining what is weighted average.</li> </ul>

### Assigned KPI Templates

This section lists the KPI templates as assigned to the selected Objective template.

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

UI Element	Description
<Table>	The table lists: <ul style="list-style-type: none"> <li>• <b>Name.</b> The KPI templates assigned to the Objective template.</li> <li>• <b>Weight.</b> The weight of the KPI used in the calculation of the Objective score.</li> </ul>

## Configuration Details Tab for a KPI Template

This page displays the configuration details of the selected KPI template.

The screenshot shows the 'Configuration details' tab for a KPI template. It includes the following sections:

- General - KPI Template:**
  - Name: % of Met SLAs
  - Unit: %
  - Description: The number of met SLAs relative to the total number of SLAs that are ongoing during the measurement period.
  - Calculation period: Monthly
- Result Threshold:**
  - Direction: Maximize
  - Include marginal status (Warning):
  - Progress bar: A horizontal bar with a red section from 0 to 90, a yellow section from 90 to 95, and a green section from 95 to 100. The current value is 0.
- Additional Details:**
  - Business Motivation: Make sure that our SLAs meet the goal, over time.

A 'Test KPI' button is located at the bottom left of the configuration area.

## General KPIs

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

UI Element	Description
<b>Name</b>	The name of the KPI template.  <b>Limitations:</b> The maximum number of characters is 240.
<b>Unit</b>	The unit of the KPI's value.

UI Element	Description
<b>Description</b>	The description of the KPI template.  <b>Limitations:</b> The maximum number of characters is 1000.
<b>Calculation Period</b>	The time period used to calculate the value of the KPI (using the formula specified in the Calculation details tab).
<b>Id</b>	The Id of the KPI. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.
<b>Type</b>	The type of the KPI. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.

### Result Threshold

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

UI Element	Description
<b>Direction</b>	It can be: <ul style="list-style-type: none"> <li>• <b>Centralize.</b> When the status of the KPI is best when it has either a specific value or its value is in a specific range, and higher or lower values are worse.</li> <li>• <b>Minimize.</b> When the status of the KPI is best when it is low.</li> <li>• <b>Maximize.</b> When the status of the KPI is best when it is high.</li> </ul>
<b>Threshold</b>	The relevant thresholds are displayed in the boxes attached to the arrows. The threshold is used to assign a status to the KPI. For details on statuses, see <a href="#">"KPI and Metric Formula and Filter, Threshold, Value, Trend, and Score" on page 22.</a>  An empty lowest and highest ends means that the threshold is an infinite value (minus infinity and plus infinity). In such a case, the threshold uses the lowest and highest historical values of the KPI template.  The Threshold fields values increase from left to right.
<b>Include marginal status (Warning)</b>	This option is selected when the status of the KPI is either <b>Good, Warning, or Critical.</b>  This option is not selected when the status of the KPI is only <b>Good, or Critical.</b>



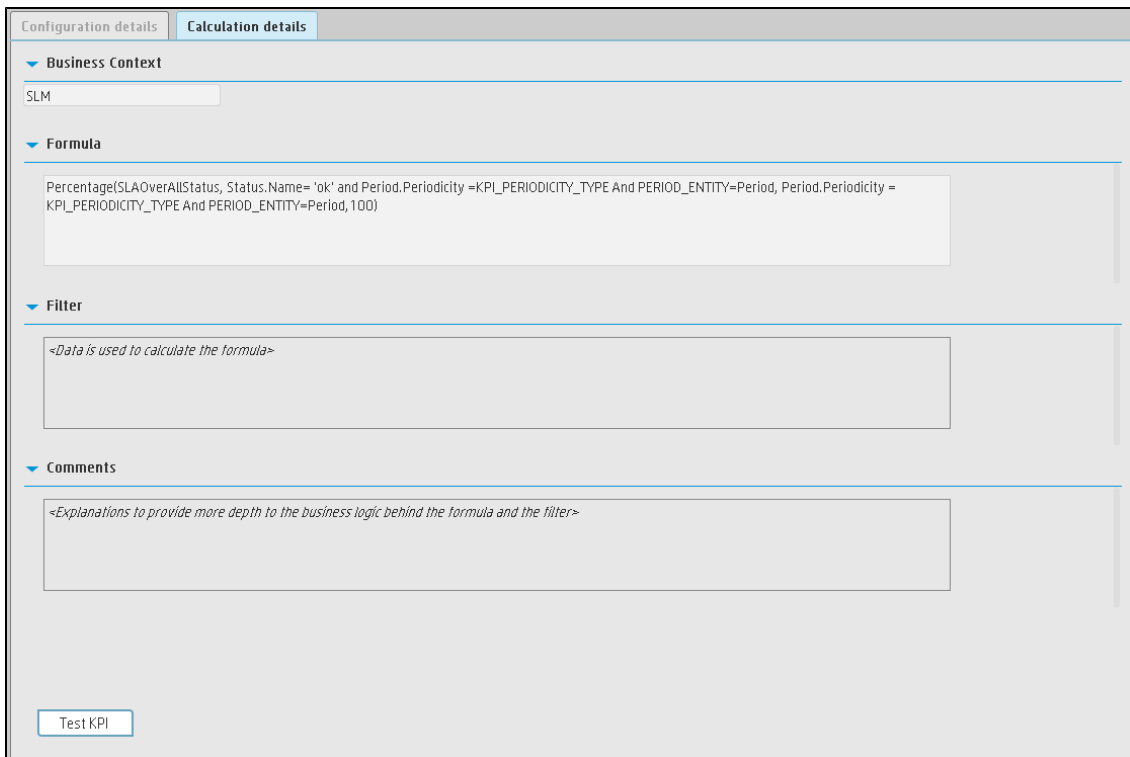
### Additional Details

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

UI Element	Description
<b>Business Motivation</b>	The business motivation of the KPI.

### Calculation Details Tab for a KPI Template

This page displays the calculation details for the selected KPI template.



### Business Context

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

UI Element	Description
<b>&lt;Business context&gt;</b>	The box displays the Business Context of the KPI template.

### Formula

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

UI Element	Description
<b>KPI Formula</b>	The formula used to calculate the value of the KPI.

### Filter

You use the Filter area to limit the range of data used for the KPI's calculation.

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

UI Element	Description
<b>Filter</b>	The filter that limits the range of data on which the KPI is to be calculated.

### Comments

The Comments area may include a description of the formula and its purpose.

## Configuration Tab for a Metric Template

This page displays the configuration details of the selected KPI template.

The screenshot shows a configuration window with two tabs: 'Configuration details' (selected) and 'Calculation details'. Under the 'Configuration details' tab, there is a section titled 'General - Metric Template'. It contains the following fields:

- Name:** Amount of Used Storage
- Unit:** TB
- Description:** The number of TBs of storage we are currently using
- Calculation period:** Daily

A 'Test Metric' button is located at the bottom left of the configuration area.

### General - Metric Template

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

UI Element	Description
<b>Name</b>	The name of the Metric template.  <b>Limitations:</b> The maximum number of characters is 240.

UI Element	Description
Unit	The unit of the Metric's value.
Description	The description of the Metric template. <b>Limitations:</b> The maximum number of characters is 1000.
Calculation Period	The time period used to calculate the value of the Metric (using the formula specified in the Calculation details tab).
Id	The Id of the KPI. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.
Type	The type of the KPI. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.

## Calculation Tab for a Metric Template

This page displays the calculation details for the selected Metric template.

The screenshot shows the 'Calculation details' tab in the Studio interface. It features several sections:

- Business Context:** Includes a dropdown menu for 'CloudOptimization'.
- Formula:** Contains the following expression: `SUM( ServiceProviderBilling.UsageQuantity, ServiceProviderBilling.UsageTypeCategory = 'Storage' And PERIOD_ENTITY = ServiceProviderBillingPeriod )/1024`
- Filter:** Contains the placeholder text: `<Select the data used to calculate the formula>`
- Comments:** Contains the placeholder text: `<Add more explanations to provide more depth to the business logic behind the formula and the filter>`

At the bottom of the tab, there is a 'Test Metric' button.

### Business Context

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

UI Element	Description
<Business context>	The box displays the Business Context of the Metric template.

### Formula

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

UI Element	Description
<Metric Formula>	The formula used to calculate the value of the Metric.

### Filter

You use the Filter area to limit the range of data used for the Metric's calculation.

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

UI Element	Description
Filter	The filter that limits the range of data on which the Metric is to be calculated.

### Comments

The Comments area may include a description of the formula, filter, Metric, and their purpose.

### Configuration Details Tab for a Folder

This page displays configuration information for the selected Folder.

The screenshot shows a configuration interface for a folder. At the top, there is a tab labeled "Configuration details". Below the tab, there is a section titled "General - Folder" with a downward arrow. This section contains two fields: "Name" with the value "Application Portfolio Management" and "Description" with the placeholder text "<Description of folder>". Below this, there is another section titled "Assigned KPI templates" with a downward arrow. This section contains a list of templates: "Average Performance Rating", "Average Maintainability Rating", and "Average Availability Rating".

### General - Folder

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

UI Element	Description
<b>Name</b>	The name of the Folder. <b>Limitations:</b> The maximum number of characters is 240.
<b>Description</b>	The description of the Folder. <b>Limitations:</b> The maximum number of characters is 1000.
<b>Id</b>	The ID number of the Folder. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.
<b>Type</b>	The type of the Folder. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.

### Assigned KPIs

This section lists the KPIs assigned to the selected Folder.

**Note:** This section is displayed only if the Folder does not have child Folders.

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

UI Element	Description
<b>Name</b>	The table lists the KPIs templates assigned to the Folder.


# Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates

Activate the relevant Scorecards, their Perspectives, Objectives, KPIs or Metrics by dragging the corresponding templates from the KPI Library pane to the Active KPI Pane.

You can create active KPIs by dragging the corresponding KPI templates from the KPI Library pane.

You can also create active Metrics by dragging the corresponding Metric templates from the KPI Library pane.

## To access:

Click the **Studio** tab. If the KPI Library pane is not displayed, click the **Toggle Side By Side** button  in the toolbar of the Active KPIs pane or click the vertical KPI Library button (on the left of the Studio).

**Section navigation:** ● ["Tasks" below](#) ● ["UI Description" on page 56](#)

## Tasks

This section includes:

["Activate a node by dragging the relevant template from the KPI Library to the Active KPI pane" below](#)


["Activate a Metric or KPI" on the next page](#)

["Activate a Folder KPI " on the next page](#)

### Activate a node by dragging the relevant template from the KPI Library to the Active KPI pane

You can create an active copy of the node template by dragging the template from the KPI Library pane to the Active KPIs pane. You can then modify the active copy in the Active KPIs pane.

To create a node using a node template, proceed as follows:

1. Click the **Studio** button (top right corner) to open the Studio.
2. You must work with the KPI Library pane and the Active KPIs pane side-by-side, so if necessary, click the **Toggle side-by-side view** button  to display the **KPI Library** pane and the **Active KPIs** pane side by side.
3. Select **Scorecard template tree** in the **Show:** list. The KPI Library pane displays the Scorecard template tree and Unassigned KPIs.
4. To create the active node, click the relevant node template in the Scorecard tree in the KPI Library pane and drag it to the Active KPIs pane.

You can drag and drop nodes from the KPI Library pane to the Active KPIs pane:

- The Scorecard template anywhere in the Active KPIs pane.
- The Perspective template only to the relevant Scorecard.
- The Objective template only to the relevant Perspective or to another Objective if the target Objective does not include KPIs.

This creates a working copy of the node template with all its sub-tree structure. The new node is given a unique name. For details about the unique names, see the Learn About section in "[Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs](#)" on page 59.

### Activate a Metric or KPI

You can create a copy of the Metric or KPI template by dragging the template to the Active KPIs pane. You can then modify the active copy in the Active KPIs pane.

To create a Metric or KPI using a Metric or KPI template, proceed as follows:

1. Click the **Studio** button (top right corner) to open the Studio.
2. Click the **KPI Library** bar to open the KPI Library.
3. Select **KPIs** in the **Show:** list. The list of Metrics or KPIs is displayed under the **Show:** box.
4. To create the active Metric or KPI, click the relevant Metric or KPI template in the KPI tree in the KPI Library pane and drag it to the Active KPIs pane.

This creates a working copy of the Metric or KPI template. Once the Metric or KPI is located in the Active KPIs pane it is activated, and the relevant data is displayed in the relevant components in the Dashboard.


The Metric is automatically moved to the **Public Metrics and KPIs** folder.

You can move the KPI either to the relevant Objective. If you move it to an empty space it is automatically moved to the **Public Metrics and KPIs** folder. You can also move it directly to the **Public Metrics and KPIs** folder.

### Activate a Folder KPI

You can create an active a KPI by dragging a Folder KPI template from the KPI Library to the Active KPIs pane. You can then modify the active copy in the Active KPIs pane.

To create a KPI using a Folder KPI template, proceed as follows:

1. Click the **Studio** button (top right corner) to open the Studio.
2. You must work with the KPI Library pane and the Active KPIs pane side-by-side, so if necessary, click the **Toggle side-by-side view** button  to display the **KPI Library** pane and the **Active KPIs** pane side by side.

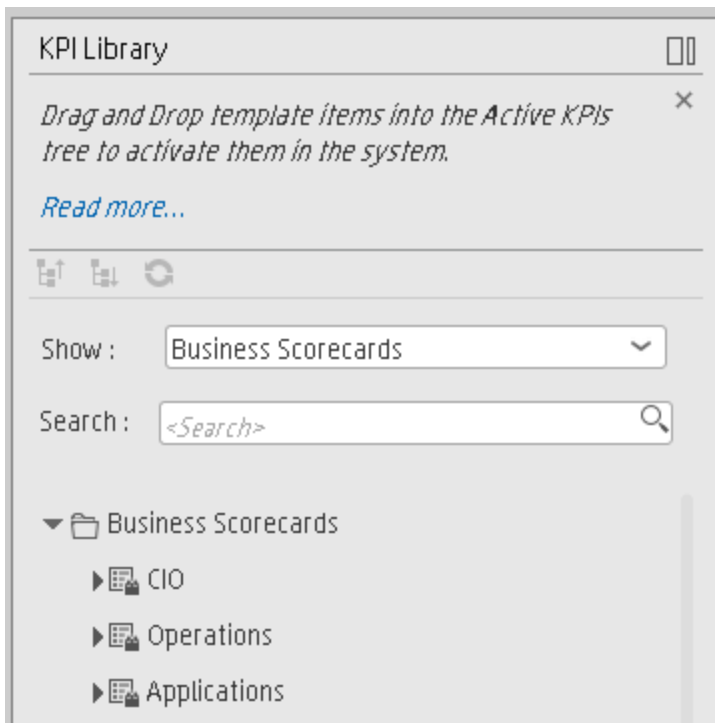
3. Select **HP Portfolio** in the **Show:** list. The KPI Library pane displays the Folder template tree and Unassigned KPIs.
4. To create the active node, click the relevant KPI template in the Folder tree in the KPI Library pane and drag it to the Active KPIs pane.

This creates an active copy of the KPI template. The new KPI is given a unique name. For details about the unique names, see the Learn More section in "[Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs](#)" on page 59.

## UI Description

### KPI Library Pane

This pane displays the trees of available Scorecard, Perspective, Objective, and KPI templates, as well as Folders, and Unassigned KPI templates.









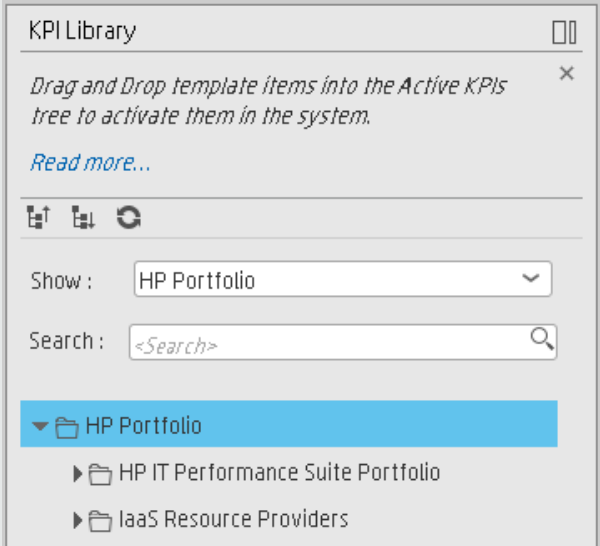
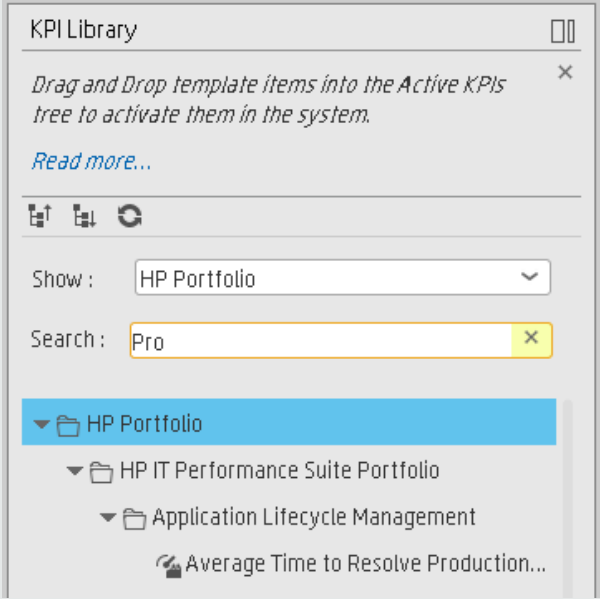
When you select an element in the KPI Library pane, the rightmost pane in the Studio displays the configuration of the selected element.

**Note:** The contents of fields is automatically validated when you type in the relevant information where fields can be empty.



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

UI Element	Description
	<p><b>Show trees side-by-side.</b> If the KPI Library pane or the Active KPIs pane is closed, click the  button to open the closed pane (or click the vertical <b>KPI Library</b> or <b>Active KPIs</b> buttons). The pane is then displayed side-by-side with the other pane and with the Configuration/Calculation details tabs.</p> <p>If the KPI Library pane and the Active KPIs pane are both open, click:</p> <ul style="list-style-type: none"> <li>• The <b>Collapse the Active KPIs</b>  button to hide the Active KPIs pane.</li> <li>• The <b>Collapse the KPI Library</b>  button to hide the KPI Library.</li> </ul>
	<p><b>Refresh the tree.</b> Click to refresh the display of the tree. For details, see "<a href="#">Templates</a>" on page 42.</p>
	<p>Collapse and expands the tree nodes.</p>
<Tree>	<p>The tree displays the hierarchy of Scorecard templates, Perspective templates, Objective templates, and KPI templates. It can also display Folders and their KPI templates, and Unassigned KPI templates. For concept details, see see the Learn More section in "<a href="#">Templates</a>" on page 42.</p>
<b>Show</b>	<p>Displays the current template tree.</p> <div data-bbox="412 1142 1370 1255" style="background-color: #f0f0f0; padding: 5px;"> <p><b>Note:</b> To change the selection, click the arrow to the right of the box and select the template you want to display in the list of templates.</p> </div>
<b>Search</b>	<p>Enter the relevant string to search for all the elements (Scorecard, Perspective, Objective, and KPI templates, Unassigned KPI templates, and Folders) in the tree, whose name includes the string.</p> <p>The filter returns the section of tree from the root down to the element whose name includes the specified string (path). It does not include elements that are not directly part of that path. The child subtree of the element is collapsed and displayed under the element.</p> <p>If more than one element includes the specified string, the paths to these elements are also displayed.</p> <div data-bbox="412 1646 1370 1705" style="background-color: #f0f0f0; padding: 5px;"> <p><b>Example</b> If the tree is as follows:</p> </div>


UI Element	Description
	 <p>The screenshot shows the 'KPI Library' interface. At the top, there is a title 'KPI Library' and a close button. Below the title, there is a description: 'Drag and Drop template items into the Active KPIs tree to activate them in the system.' and a 'Read more...' link. There are three icons: a list icon, a grid icon, and a refresh icon. Below the icons, there is a 'Show:' dropdown menu set to 'HP Portfolio' and a 'Search:' input field containing '&lt;Search&gt;'. Below the search field, there is a tree view with the following items: 'HP Portfolio' (expanded), 'HP IT Performance Suite Portfolio', and 'IaaS Resource Providers'.</p> <p>After searching for the string: <b>pro</b>, the resulting tree is as follows:</p>  <p>The screenshot shows the 'KPI Library' interface after a search for 'pro'. The 'Show:' dropdown menu is still set to 'HP Portfolio'. The 'Search:' input field now contains 'Pro' and has a yellow highlight. Below the search field, the tree view shows the following items: 'HP Portfolio' (expanded), 'HP IT Performance Suite Portfolio', 'Application Lifecycle Management', and 'Average Time to Resolve Production...'. The 'Average Time to Resolve Production...' item has a small icon next to it.</p>

# Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs

You can create Scorecards, their Perspectives, Objectives, Metrics, and KPIs directly in the Active KPI Pane.

**Note:** In the following sections, "node" represents Scorecards, Perspectives, or Objectives.

## To access:

Click the **Studio** tab. If the Active KPIs pane is not displayed (it is displayed by default), click the **Toggle Side By Side** button  in the toolbar of the KPI Library pane.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on the next page](#) ● ["UI Description" on page 63](#)

## Learn More

### About unique names

The name of each entity (Scorecard, Perspective, Objective, Metric, or KPI) must be unique but the context in which it needs to be unique is different.

### Scorecard names must be unique in the same active tree

When you drag and drop a Scorecard template to the Active KPIs pane you create an active copy of the Scorecard template with all its sub-tree structure. If a Scorecard with the same name already exists in the Active KPIs pane, the name of the newly added Scorecard gets the (n) suffix (where n=0 the first time and n gets incremented if necessary).

### Perspective names must be unique in the same Scorecard

When you drag and drop a Perspective template to the Active KPIs pane, you create an active copy of the Perspective template. The new Perspective must have a unique name in the Scorecard tree. If the Perspective does not already exist in the Scorecard tree, it is given the same name as the Perspective template. If a Perspective with the same name already exists in the same Scorecard tree, the name of the newly added Perspective gets the (n) suffix (where n=0 the first time and n gets incremented if necessary).

### Objective names must be unique under the same parent (Perspective or Objective)

When you drag and drop an Objective template to the Active KPIs pane, you create an active copy of the Objective template. The new Objective must have a unique name in the Perspective or Objective tree at the same hierarchical level. If the Objective does not already exist in the Perspective or Objective tree, it is given the same name as the Objective template. If an Objective with the same name already exists in the same Perspective or Objective tree, the name of the newly added Objective gets the (n) suffix (where n=0 the first time and n gets incremented if necessary).

### **KPI names must be unique in the same active tree**

When you drag and drop a KPI template to the Active KPIs pane, you create an active copy of the KPI template. The new KPI must have a unique name in the Active KPIs pane. If the KPI does not already exist in the active tree, it is given the same name as the KPI template. If a KPI with the same name already exists in the same active tree, the name of the newly added KPI gets the (n) suffix (where n=0 the first time and n gets incremented if necessary). The same KPI might be assigned to several Objectives.

### **Metric names must be unique in the same active tree**

When you drag and drop a Metric template to the Active KPIs pane, you create an active copy of the Metric template. The new Metric must have a unique name in the Active KPIs pane. If the Metric does not already exist in the tree, it is given the same name as the Metric template. If a Metric with the same name already exists in the same tree, the name of the newly added Metric gets the (n) suffix (where n=0 the first time and n gets incremented if necessary).

### **Important Information**

When you select an element in the Active KPIs pane, the rightmost pane in the Studio displays the configuration of the selected element.

- For a Scorecard, see the UI Description section in ["Scorecard Configuration Details" on page 70](#).
- For a Perspective, see the UI Description section in ["Perspective Configuration Details" on page 75](#).
- For an Objective, see the UI Description section in ["Objective Configuration Details" on page 79](#).
- For a KPI, see the UI Description section in ["KPI or Metric Configuration and Calculation Details" on page 90](#).

**Note:** The contents of a field are automatically validated when you type in the relevant information where fields can be empty.

## **Tasks**

This section includes:

["Create a new node" on the next page](#)

["Create a new active KPI" on the next page](#)

["Create a new Metric" on page 62](#)

["Create active KPIs or Metrics by cloning existing KPIs or Metrics" on page 62](#)

["Delete a KPI" on page 63](#)

## Create a new node

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, click the **Create a new entity** \* button.
3. Select the **Scorecard**, **Perspective**, or **Objective** option in the menu that opens. Depending on your selection, the following happens in the **Active KPIs** pane:
  - 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 "[Scorecard Configuration Details](#)" on page 70.
  - A **New Perspective** node is added at the bottom of the Scorecard tree you selected before adding the Perspective (the option to create a new Perspective is only available if you have already selected a Scorecard). The new Perspective has an automatically generated unique name. The Perspective is automatically selected in the tree. You can then configure the Perspective. For details, see "[Perspective Configuration Details](#)" on page 75.
  - A **New Objective** node is added at the bottom of the Perspective you selected before adding the Objective (the option to create a new Objective is only available if you have already selected a Perspective). The new Objective has an automatically generated unique name. The Objective is automatically selected in the tree. You can then configure the Objective. For details, see "[Objective Configuration Details](#)" on page 79.

**Note:** The new Objective can also be created at the bottom of the Objective you have selected, if the selected Objective does not already have KPIs.


## Create a new active KPI

To create a new active KPI, proceed as follows:

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, you can:
  - Select the Objective to which you want to assign the KPI, click the **Create a new entity** \* button, and select the **KPI** option in the menu that opens. The new KPI is added at the bottom of the Objective tree. The new KPI has an automatically generated unique name. The KPI is automatically selected in the tree. You can modify the KPI name. You can then configure the KPI. For details, see "[KPI or Metric Configuration and Calculation Details](#)" on page 90.
  - Select the **Public Metrics and KPIs** folder, and click the **Create a new entity** \* button and select the **KPI** option in the menu that opens. A new Unassigned KPI or Metric is added to the folder. Its name is followed by (n) where n represents the number of clones created from the same KPI or Metric. You can modify the KPI or Metric name. You can then configure the KPI or Metric. For details, see "[KPI or Metric Configuration and Calculation Details](#)" on page 90. You can then move the KPI to the relevant Objective.

## 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 **Public Metrics and 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 "[KPI or Metric Configuration and Calculation Details](#)" on page 90 in the *IT Executive Scorecard 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 "[Calculation](#)" on page 143

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 [Movies](#).

## Create active KPIs or Metrics by cloning existing KPIs or Metrics


To create a new active KPI or Metric, proceed as follows:

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, right-click the KPI or Metric you want to clone and click the **Create a copy of the current entity**  option or select the KPI or Metric and click the **Create a copy of the current entity**  button in the Active KPIs toolbar. The cloned KPI or Metric is added at the bottom of the list of KPIs for the Objective or at the bottom of the **Public Metrics and KPIs** folder. Its name is followed by (n) where n represents the number of clones created from the same KPI. You can modify the KPI or Metric name.

You can then configure the KPI or Metric. For details, see "[KPI or Metric Configuration and Calculation Details](#)" on page 90.

## Delete a KPI

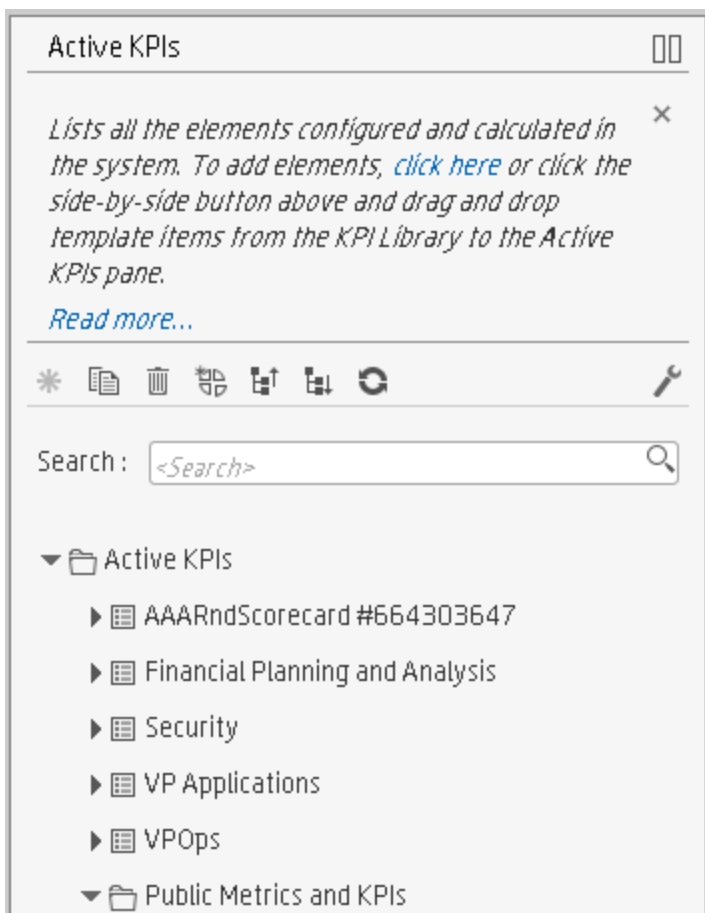
To permanently delete an existing active KPI:

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, you can do one of the following:
  - Select the relevant KPI, and click the **Delete the currently selected node**  button in the Active KPIs toolbar.
  - Right-click the relevant KPI, and select the **Delete** option in the menu that opens.
3. If the selected KPI is:
  - The child of an Objective, when you are prompted to accept the deletion, you can select to:
    - Un-assign this specific KPI from the Objective when you click **Yes**.
    - Delete this KPI from the system. If you select this option, all the listed active KPI instances are removed when you click **Yes**.
  - An Unassigned KPI, the KPI is deleted when you click **Yes**.






## UI Description

### Active KPIs Pane



This pane displays the tree of active Scorecards, Perspectives, Objectives, Metrics, and KPIs, as well as the **Public Metrics and KPIs** folder that includes Unassigned KPIs and Metrics.











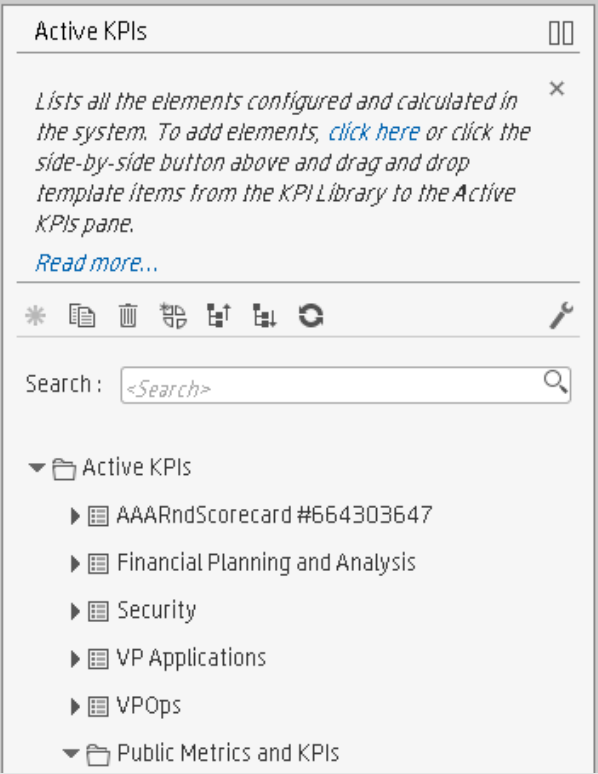
User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets>):

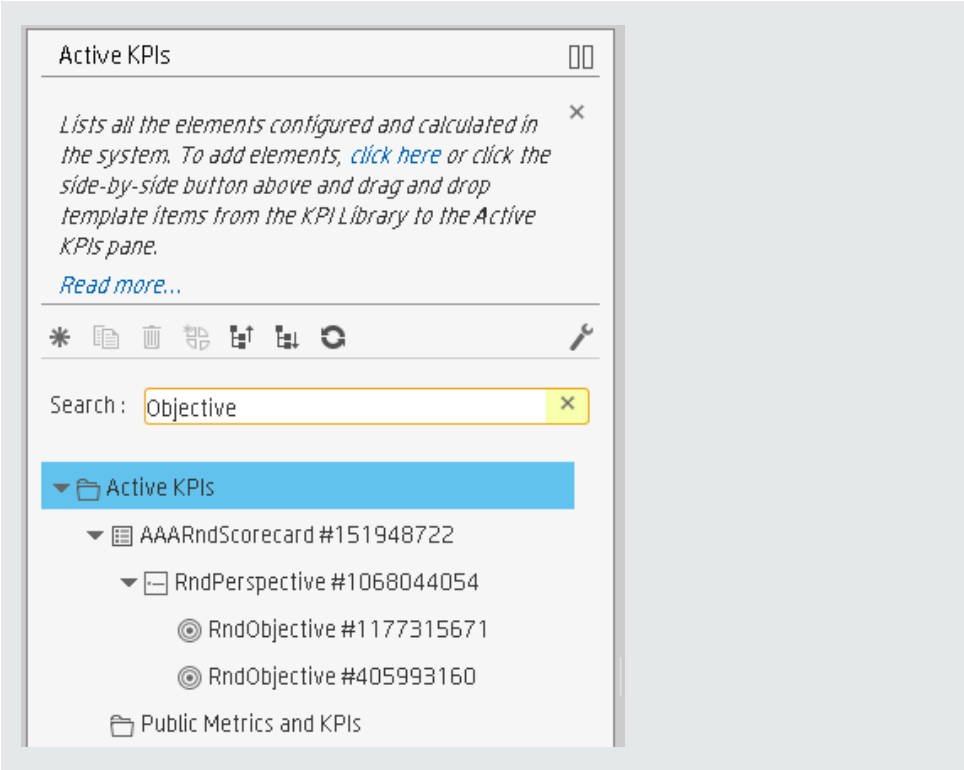

UI Element	Description
	<p><b>Show trees side-by-side.</b> If the KPI Library pane or the Active KPIs pane is closed, click the  button to open the closed pane (or click the vertical <b>KPI Library</b> or <b>Active KPIs</b> buttons). The pane is then displayed side-by-side with the other pane and with the Configuration/Calculation details tabs.</p> <p>If the KPI Library pane and the Active KPIs pane are both open, click:</p> <ul style="list-style-type: none"> <li>• The <b>Collapse the Active KPIs</b>  button to hide the Active KPIs pane.</li> <li>• The <b>Collapse the KPI Library</b>  button to hide the KPI Library.</li> </ul>
	<p><b>Create a new entity.</b> Click to display a menu that enables you to select:</p> <ul style="list-style-type: none"> <li>• <b>Scorecard.</b> A new Scorecard is displayed at the bottom of the tree. The Configuration tab for the Scorecard is displayed in the Configuration pane where</li> </ul>




UI Element	Description
	<p>you can enter the details for the new Scorecard. For details, see the UI Description section in "<a href="#">Scorecard Configuration Details</a>" on page 70.</p> <ul style="list-style-type: none"> <li> <b>Perspective.</b> A new Perspective is displayed at the bottom of the tree under the selected Scorecard. The Configuration tab for the Perspective is displayed in the Configuration pane where you can enter the details for the new Perspective. For details, see the UI Description section in "<a href="#">Perspective Configuration Details</a>" on page 75.         </li> <li> <b>Objective.</b> A new Objective is displayed at the bottom of the tree under the selected Perspective. The Configuration tab for the Objective is displayed in the Configuration pane where you can enter the details for the new Objective. For details, see the UI Description section in "<a href="#">Objective Configuration Details</a>" on page 79.         </li> <li> <b>KPI.</b> A new Unassigned KPI or a KPI under a selected Objective is displayed at the bottom of the tree. The Configuration tab and Calculation tab for the KPI, where you can enter the details for the new KPI, are displayed. For details, see the UI Description section in "<a href="#">KPI or Metric Configuration and Calculation Details</a>" on page 90.         </li> <li> <b>Metric.</b> A new Metric is displayed at the bottom of the tree. The Configuration tab and Calculation tab for the Metric, where you can enter the details for the new Metric, are displayed. For details, see the UI Description section in "<a href="#">KPI or Metric Configuration and Calculation Details</a>" on page 90.         </li> </ul>
	<p><b>Create a copy of the current entity.</b> Select an entity in the tree and click the button to duplicate the entity. The entity is created in the tree below the original entity, with the same name. A number between parenthesis is added at the end of the entity's name (for example: MTTR(0)).</p>
	<p><b>Delete Currently Selected Node.</b> Select the Scorecard, Perspective, Objective, Metric, KPI, or KPI or Metric Breakdown you want to delete and click the button.</p>

UI Element	Description
	<p><b>Create KPI or Metric Breakdown.</b> The list of available entities for the KPI or Metric is displayed.</p> <p>To create a KPI Breakdown or Metric you can do one of the following:</p> <ul style="list-style-type: none"> <li>• Right-click the relevant KPI, Metric, KPI Breakdown, or Metric Breakdown, select <b>Breakdown</b> and then select the entity and dimension in the list that opens.</li> <li>• Select the relevant KPI, Metric, KPI Breakdown, or Metric Breakdown, and click the button in the tool bar. In the list of entities and dimensions that open select the relevant entity and dimension.</li> </ul> <p>To understand KPI/Metric Breakdowns, see "<a href="#">KPI Breakdowns</a>" on page 160 or "<a href="#">Metric Breakdowns</a>" on page 167.</p>
	<p><b>Calculation options.</b> Displays the calculation options:</p> <p> <b>Calculate now.</b> Calculates all KPIs and Objectives values, statuses, and scores in the selected universe. The Calculate Now dialog box opens where you select the universe and confirm that you want to perform the calculation for the current time period. For details, see "<a href="#">Calculation</a>" on page 143.</p> <p> <b>Recalculate.</b> Recalculates the selected entity for the selected historical (past) time period. The recalculation period is limited to up to a year in the past. The Recalculate dialog box opens where you can specify the universe and the time frame. For details, see "<a href="#">Recalculation</a>" on page 146.</p> <p> <b>Schedule context calculation.</b> Opens the Business Context Calculation Scheduling dialog box where you can schedule the context calculation. For details, see "<a href="#">Calculation Scheduling</a>" on page 150.</p> <p> <b>Calculation monitoring.</b> Opens the Calculation Monitoring dialog box where you can monitor the calculation or recalculation history for each Business Context, or to view the Business Contexts that are currently being calculated or recalculated. For details, see "<a href="#">Calculation and Recalculation Monitoring</a>" on page 153.</p>
	<p>Collapses and expands the tree nodes.</p>
	<p><b>Refresh the tree.</b> Click to refresh the display of the tree.</p>

UI Element	Description
<p><b>Search</b></p>	<p>Enter the relevant string to search for all the elements (Scorecards, Perspectives, Objectives, KPIs, Metrics, KPI Breakdowns, or Metric Breakdowns) in the tree, whose name includes the string.</p> <p>The filter returns the section of tree from the root down to the element whose name includes the specified string (path). It does not include elements that are not directly part of that path. The child sub-tree of the element is collapsed and displayed under the element.</p> <p>If more than one element includes the specified string, the paths to these elements are also displayed.</p> <div data-bbox="412 701 1369 1654" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>Example</b></p> <p>If the tree is as follows:</p>  <p>After searching for the string: Objective, the resulting tree is as follows:</p> </div>

UI Element	Description
	
<tree>	<p>The pane displays the active tree with the relevant Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, and in the <b>Public Metrics and KPIs</b> folder, standalone KPIs, and Metrics.</p> <ul style="list-style-type: none"> <li>• Right-click any element in the tree to display the relevant options that correspond to the options available in the toolbar and also include a Help button that enable you to access the online help.</li> <li>• You can move tree nodes (Scorecards, Perspectives, Objectives, and KPIs) by dragging and dropping them in the relevant location in the tree. For example, you can drag a KPI from an Objective to another Objective.</li> <li>• You cannot drag a KPI Breakdown from one KPI to another.</li> <li>• You cannot drag a Metric Breakdown from one Metric to another.</li> <li>• You can drag an Unassigned KPI to an Objective, but you cannot drag a KPI assigned to an Objective to change it into an Unassigned KPI.</li> <li>• When you are performing a drag and drop operations:             <ul style="list-style-type: none"> <li>▪ The  icon indicates that the drop is not allowed.</li> </ul> </li> </ul>

UI Element	Description
	<ul style="list-style-type: none"><li data-bbox="444 365 1354 428">■ The  Average Time to Resolve Productivity icon indicates that the drop is allowed.</li></ul> <p data-bbox="428 470 1370 638"><b>Note about the Public Metrics and KPIs folder:</b> The KPIs and Metrics under this folder are public and any modification done on one or more may affect other users. If you want to use a standalone KPI and assign it to a Scorecard, clone it before assigning it. You can then modify it to fit your requirements.</p>

# Scorecard Configuration Details

An activated Scorecard displays, in the Dashboard relevant Scorecard component, how well the corresponding objectives are met.

You can display and modify the configuration information for the selected active Scorecard in the Active KPIs pane.

**Note:** In this section, "node" represents Scorecards.

## To access:

Click a Scorecard in the Active KPIs pane.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on the next page](#) ● ["UI Description" on page 72](#)

## Learn More

### About Active Scorecards

A Scorecard is a high-level snapshot (visual summary) of any organizational performance. Scorecards display a collection of Objectives, and assess the performance of the organization by viewing the status of Objectives.

A Scorecard is a way to map and translate complex business information into something that is understandable to everyone. The methodology starts with targets defined by the organization, followed by Scorecard Objectives.

The following table shows how core Scorecard elements relate to key performance questions.

Scorecard Element	Key Performance Question	More Information and Example
Perspective\Strategy	What is the strategy trying to achieve?	<p>For details about Perspectives, see <a href="#">"Perspectives" on page 19</a>.</p> <p>A Scorecard can include one or more Perspectives.</p> <p><b>Example</b> Operational excellence.</p>

Scorecard Element	Key Performance Question	More Information and Example
Objective	What is the objective trying to achieve?	<p>For details about Objectives, see <a href="#">"Objectives" on page 20</a>.</p> <p>A Perspective can include one or more Objectives.</p> <p><b>Example</b> Increase responsiveness in IT to service requests for PC orders by 20% in 2010.</p>
KPI	How will performance be measured?	<p>For details about KPIs, see <a href="#">"KPIs and Metrics" on page 21</a>.</p> <p>An Objective can include more than one KPI.</p> <p><b>Example</b> Time to order, configure, and install PC.</p>
Threshold	What performance level is required?	24 hours.

Out-of-the-box templates of Scorecards, Perspectives, Objectives, and KPIs are provided. These templates correspond to business elements. For details, see ["Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 54](#).

Active Scorecards, Perspectives, Objectives, and KPIs display real data in the Dashboard. For details, see ["Active KPIs Pane" on page 63](#).

### Scorecard names must be unique in the same active tree.

When you drag and drop a Scorecard template to the Active KPIs pane you create an active copy of the Scorecard template with all its sub-tree structure. If a Scorecard with the same name already exists in the Active KPIs pane, the name of the newly added Scorecard gets the (n) suffix (where n=0 the first time and n gets incremented if necessary).

### Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab

Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158](#).

## Tasks

This section includes:

["Customize the Node" on the next page](#)

["Populate the Node" on the next page](#)

["Delete a Node" on page 89](#)

## Customize the Node

To customize the node:

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, select the relevant node. Its details are displayed in the Configuration Details pane.
3. Modify the node's details and click **Save** to save the changes.

## Populate the Node

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, select the relevant node. Its details are displayed in the Configuration Details pane.
3. You can also populate the node by adding or removing the following nodes:
  - a. Perspectives. For details, see ["Perspective Configuration Details" on page 75](#).
  - b. Objectives. For details, see ["Objective Configuration Details" on page 79](#).
  - c. KPIs. For details, see ["KPI or Metric Configuration and Calculation Details" on page 90](#).
  - d. KPI Breakdowns. For details, see ["KPI Breakdowns" on page 160](#).

# UI Description

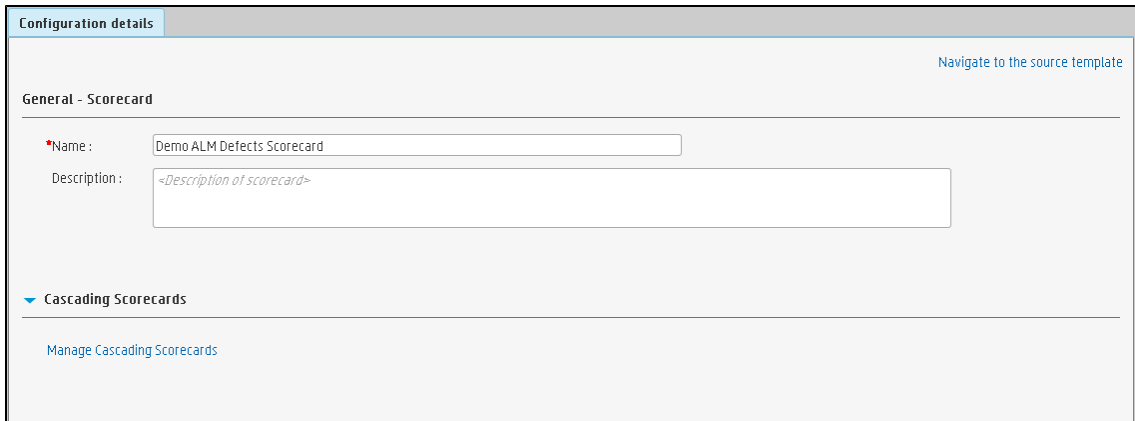
## Configuration Details Tab for a Scorecard

This page displays configuration information for the selected active Scorecard in the Active KPIs pane.


## Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab

Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158](#).





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

UI Element	Description
<b>Navigate to the source template</b>	Moves the cursor to the template that was used to create the current Scorecard, in the KPI Library pane. The details of the template are displayed in the Configuration Details pane.
<b>Save</b>	Click to save the changes.
<b>Discard</b>	Click to discard the changes you have made since the last Save operation.
	Click the refresh button, in the top right corner, to refresh the display.

### General - Scorecard


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

UI Element	Description
<b>Name</b>	The name of the active Scorecard.  <b>Limitations:</b> <ul style="list-style-type: none"> <li>• The characters: \ / : * ? " &lt; &gt;   are not supported.</li> <li>• The maximum number of characters is 240.</li> </ul>
<b>Description</b>	The description of the Scorecard.  <b>Limitations:</b> The maximum number of characters is 1000.

UI Element	Description
<b>Id</b>	The Id of the Scorecard. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.
<b>Type</b>	The type of Scorecard. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.

### Cascading Scorecards

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

UI Element	Description
<b>Manage Cascading Scorecards</b>	Click to open the <b>Manage Cascading Scorecards</b> dialog box where you can select the Scorecards that are to be the target Scorecards for the drilldown from the current Scorecard. For details, see " <a href="#">Cascading Scorecards</a> " on page 180.
<b>Name</b>	The name of the Cascading Scorecard.
<b>Remove</b>	Click the relevant <b>Remove</b>  button to remove the selected Scorecard from the list of Cascading Scorecards.

# Perspective Configuration Details

An activated Perspective represents one of the strategies included in a Scorecard.

**Note:** In this section, "node" represents Perspectives.

## To access:

Click a Perspective in the Active KPIs pane.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" below](#) ● ["UI Description" on the next page](#)

## Learn More

### About Perspectives

A Perspective represents one of the strategies included in a Scorecard.

Every Scorecard definition includes out-of-the-box definitions as well as Perspectives that include Objectives that are linked to KPIs.

A Perspective represents a group of Objectives that can help the executive track and analyze the relevant business issue.

### Perspective names must be unique in the same Scorecard.

When you drag and drop a Perspective template to the Active KPIs pane, you create an active copy of the Perspective template. The new Perspective must have a unique name in the Scorecard tree. If the Perspective does not already exist in the Scorecard tree, it is given the same name as the Perspective template. If a Perspective with the same name already exists in the same Scorecard tree, the name of the newly added Perspective gets the (n) suffix (where n=0 the first time and n gets incremented if necessary).

### Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab

Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158](#).

## Tasks

This section includes:

["Customize the Node" on the next page](#)

["Populate the Node" on the next page](#)

["Delete a Node" on page 89](#)

## Customize the Node

To customize the node:

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, select the relevant node. Its details are displayed in the Configuration Details pane.
3. Modify the node's details and click **Save** to save the changes.

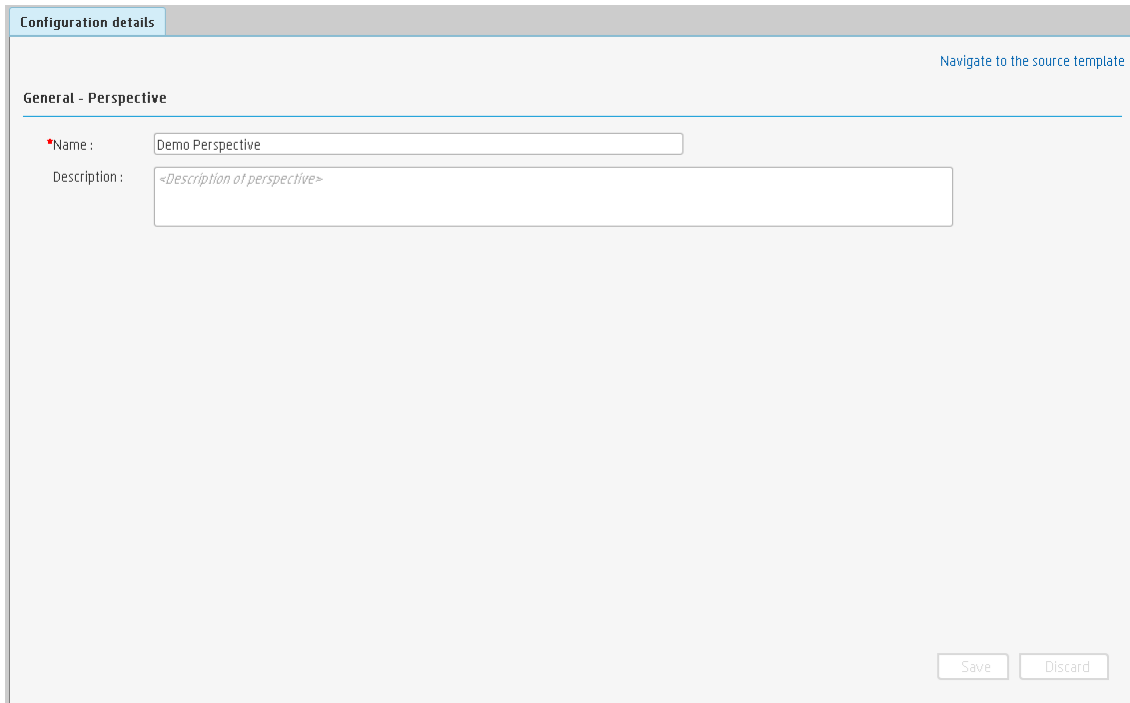
## Populate the Node

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, select the relevant node. Its details are displayed in the Configuration Details pane.
3. You can also populate the node by adding or removing the following nodes:
  - a. Objectives. For details, see "[Objective Configuration Details](#)" on page 79.
  - b. KPIs. For details, see "[KPI or Metric Configuration and Calculation Details](#)" on page 90.
  - c. KPI Breakdowns. For details, see "[KPI Breakdowns](#)" on page 160.


# UI Description

## Configuration Details Tab for a Perspective

This page enables you to display the configuration of an active Perspective.



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

UI Element	Description
<b>Navigate to the source template</b>	Moves the cursor to the template that was used to create the current Perspective, in the KPI Library pane. The details of the template are displayed in the Configuration Details pane.
<b>Save</b>	Click to save the changes.
<b>Discard</b>	Click to discard the changes you have made since the last Save operation.
	Click to refresh the display.

### General - Perspective

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

UI Element	Description
<b>Name</b>	The name of the active Perspective.  <b>Limitations:</b> <ul style="list-style-type: none"> <li>• The characters: \ / : * ? " &lt; &gt;   are not supported.</li> <li>• The maximum number of characters is 240.</li> </ul>

UI Element	Description
<b>Description</b>	The description of the Perspective. <b>Limitations:</b> The maximum number of characters is 1000.
<b>Id</b>	The Id of the Perspective. It is automatically assigned. This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.
<b>Type</b>	The type of Perspective. It is automatically assigned. This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.

# Objective Configuration Details

An activated Objective represents one of the strategies includes in a Scorecard.

**Note:** In this section, "node" represents Objectives.

## To access:

Click an Objective in the Active KPIs pane.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on the next page](#) ● ["UI Description" on page 81](#)

## Learn More

### About Active Objectives

An Objective represents an overall performance goal that is defined by an executive. An Objective is a heading for a group of KPIs of different types that can represent different aspects of the goal.

**Example** If an executive wants to measure the IT department responsiveness, an Objective that measures different aspects of the responsiveness of the IT department is created.

Each aspect is measured by a different KPI type (for example: PC purchase time, and more). These KPIs provide values, trends, and statuses.

An Objective always shows the status of a performance goal, but does not display a performance actual value. In a typical Scorecard, Objectives show cumulative performance indicators that roll up the scores of KPIs. On a Scorecard, Objectives appear at the top level of a KPI hierarchy.

Objectives should be "SMART" (Specific, Measurable, Action-Oriented, Realistic, and Time Bound). This distinction makes it possible to know if you have met your objective.

**Example** If your Reduce Costs Objective is about cost reduction, your organization may not hit the mark or may go too far. Objectives have both a negative and positive impact on organizational behavior. The "Smarter" your goal, the less variation you will experience in your results. A better objective would be for example, reduce IT operating expenses by 20% in 2011. This new objective gives you a targeted expense to reduce, a percentage goal, a time period and an organization. It meets the criteria and is achievable.

### Parent-child dependency:

An Objective is a parent unit for its KPIs. An Objective uses a specific rule for the calculation of its results. The rule is based on the child KPIs score results. The available parent-child rules are:

- **BEST\_CHILD** – The parent Objective result corresponds to the highest score of its child KPIs score values.

- **WORST\_CHILD** – The parent Objective result corresponds to the worst score of its child KPIs score values.
- **WEIGHTED\_AVERAGE** – The parent Objective result is the average value of its weighted child KPIs score values.

### **Objective names must be unique under the same parent (Perspective or Objective).**

When you drag and drop an Objective template to the Active KPIs pane, you create an active copy of the Objective template. The new Objective must have a unique name in the Perspective or Objective tree at the same hierarchical level. If the Objective does not already exist in the Perspective or Objective tree, it is given the same name as the Objective template. If an Objective with the same name already exists in the same Perspective or Objective tree, the name of the newly added Objective gets the (n) suffix (where n=0 the first time and n gets incremented if necessary).

### **Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab**

Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158.](#)

## **Tasks**

This section includes:

["Customize the Node" below](#)

["Populate the Node" below](#)

["Delete a Node" on page 89](#)

["Objective Configuration Details" on the previous page](#)

### **Customize the Node**

To customize the node:

1. Click the **Studio** button (top right corner) to open the Studio.
2. In the **Active KPIs** pane, select the relevant node. Its details are displayed in the Configuration Details pane.
3. Modify the node's details and click **Save** to save the changes.


### **Populate the Node**

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



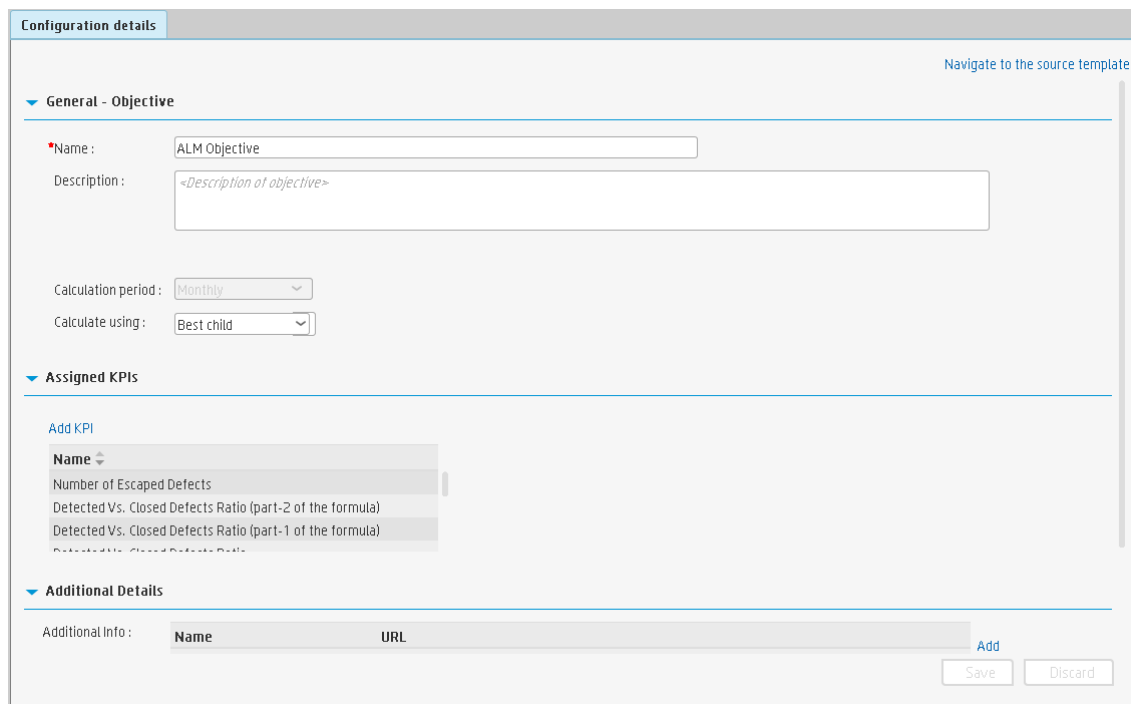
2. In the **Active KPIs** pane, select the relevant node. Its details are displayed in the Configuration Details pane.
3. You can also populate the node by adding or removing the following nodes:
  - a. KPIs. For details, see "[KPI or Metric Configuration and Calculation Details](#)" on page 90.
  - b. KPI Breakdowns. For details, see "[KPI Breakdowns](#)" on page 160.

## Unassign a KPI from an Objective

1. In the Active KPIs pane, select an Objective.
2. In the Configuration Details tab, in the **Assigned KPIs** section, click the **Un-assign**  button for the relevant KPI. The KPI immediately disappears from the KPIs table.
3. To save the changes you must save the Objective by clicking **Save**.


# UI Description

## Configuration Details Tab for an Objective



The screenshot displays the 'Configuration details' tab for an objective. It features a 'General - Objective' section with fields for 'Name' (containing 'ALM Objective') and 'Description' (containing '<Description of objective>'). Below these are dropdown menus for 'Calculation period' (set to 'Monthly') and 'Calculate using' (set to 'Best child'). The 'Assigned KPIs' section includes an 'Add KPI' button and a list of KPIs with a search bar and a dropdown arrow. The 'Additional Details' section shows a table with columns for 'Name' and 'URL', and an 'Add' button. At the bottom right, there are 'Save' and 'Discard' buttons. A 'Navigate to the source template' link is visible in the top right corner.

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

UI Element	Description
<b>Navigate to the source template</b>	Moves the cursor to the template that was used to create the current Objective, in the KPI Library pane. The details of the template are displayed in the Configuration Details pane.
<b>Save</b>	Click to save the changes.
<b>Discard</b>	Click to discard the changes you have made since the last Save operation.
	Click to refresh the display.

### General - Objective

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

UI Element	Description
<b>Name</b>	The name of the active Objective.  <b>Limitations:</b> <ul style="list-style-type: none"> <li>• The characters: \ / : * ? " &lt; &gt;   are not supported.</li> <li>• The maximum number of characters is 240.</li> </ul>
<b>Description</b>	The description of the Objective.  <b>Limitations:</b> The maximum number of characters is 1000.
<b>Id</b>	The ID number of the Objective. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.
<b>Type</b>	The type of the Objective. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.
<b>Calculation Period</b>	The calculation period of the Objective.  Since an Objective and its children must have the same calculation period, you can modify the value in this field only when the Objective does not have child KPIs or Objectives.


UI Element	Description
<p><b>Calculate Using</b></p>	<p>The type of rule to use to calculate the Objective's score according to the scores of its children.                      You can select:</p> <ul style="list-style-type: none"> <li>• <b>Worst child.</b> The Objective score is the worst score of all the KPIs assigned to the parent Objective (when the Objective has child KPIs) or of the Objectives assigned to the parent Objective.</li> <li>• <b>Best child.</b> The Objective score is the best score of all the KPIs assigned to the parent Objective (when the Objective has child KPIs) or of the Objectives assigned to the parent Objective.</li> <li>• <b>Weighted average.</b> The Objective score is the average of the scores of the KPIs assigned to the parent Objective multiplied by the relevant weights, or if the Objective has child Objectives, the average of the scores of the child Objectives multiplied by the relevant weights. When you select this rule in the Studio, an additional column (<b>Weight</b>) where the user can configure the weight of each child (Objective or KPI) for the weighted average calculation. When you select this value a note is displayed explaining what is weighted average.</li> </ul>

**Assigned KPIs**

This section lists the KPIs assigned to the selected active Objective.

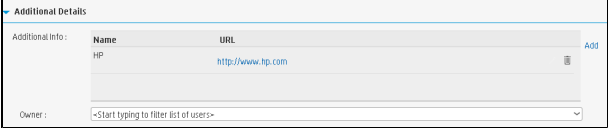

User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets>):

UI Element	Description
<p><b>Add KPI</b></p>	<p>Click to open the Assign KPI to Objective dialog box where you can assign the relevant KPIs to the current Objective. For details, see "<a href="#">Objective's KPIs</a>" on page 86.</p>

UI Element	Description								
<Table>	<p>The table lists:</p> <ul style="list-style-type: none"> <li>• <b>Name.</b> The KPIs assigned to the Objective.</li> <li>• <b>Weight.</b> This column is displayed only when you select <b>Weighted Average</b> in the <b>Calculate Using</b> field in the <b>General - Objective</b> area. Enter the weight you want to use for the KPI in the calculation of the Objective score. You can click the Weight value in the Assigned KPIs table to open a box where you can change the weight. After you have changed the value of the weight, the <b>Save</b> and <b>Discard</b> buttons are enabled. To save the changes you must save the Objective by clicking <b>Save</b>.</li> </ul> <div data-bbox="446 730 1052 934" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Calculation period: <input type="text" value="Monthly"/></p> <p>Calculate using: <input type="text" value="Weighted Average"/> <small>Note: The weight determines the impact of the KPI on the calculation</small></p> <p>Assigned KPIs</p> <p>Add KPI</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Weight</th> </tr> </thead> <tbody> <tr> <td>Number of Escaped Defects</td> <td>1</td> </tr> <tr> <td>Detected Vs. Closed Defects Ratio (part-2 of the formula)</td> <td>1</td> </tr> <tr> <td>Detected Vs. Closed Defects Ratio (part-1 of the formula)</td> <td>1</td> </tr> </tbody> </table> </div> <ul style="list-style-type: none"> <li>•  Click to unassign the KPI. The list of KPIs in the Assign KPIs area is immediately updated. The <b>Save</b> and <b>Discard</b> buttons becomes enabled. To save the changes you must save the Objective by clicking <b>Save</b>.</li> </ul>	Name	Weight	Number of Escaped Defects	1	Detected Vs. Closed Defects Ratio (part-2 of the formula)	1	Detected Vs. Closed Defects Ratio (part-1 of the formula)	1
Name	Weight								
Number of Escaped Defects	1								
Detected Vs. Closed Defects Ratio (part-2 of the formula)	1								
Detected Vs. Closed Defects Ratio (part-1 of the formula)	1								

### Additional Details

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

UI Element	Description
<p><b>Additional Info</b></p>	<p>Lists the additional information available for the Objective. It can be links to BO or Xcelcius reports, external links, or links to Dashboard pages.</p>  <p>The table includes:</p> <ul style="list-style-type: none"> <li>• <b>Name.</b> The name of the link or the reports or the name of the URL.</li> <li>• <b>URL.</b> The hyperlink to access additional external information. Click the link to open the Edit Info Link dialog box where you can edit the selected additional information. For details, see "<a href="#">KPI or Objective Additional Information</a>" on page 177.</li> <li>•  Click to delete the selected additional information.</li> </ul>
<p><b>Owner</b></p>	<p>The owner of the active Objective.</p> <p>The list of available owners corresponds to the users that were defined in <b>Admin &gt; Users and Roles &gt; User Management</b>. For details, see "<a href="#">Manage Users</a>" in the <i>IT Executive Scorecard Administrator Guide</i>.</p>
<p><b>Add Info</b></p>	<p>Click to open the <b>Add Info Link</b> dialog box where you can add additional information for the Objective. For details, see "<a href="#">KPI or Objective Additional Information</a>" on page 177.</p>

# Objective's KPIs

You can assign a KPI to an Objective.

## To access:

In the Configuration details tab for an Objective, click the **Add KPI** link.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" below](#) ● ["UI Description" on the next page](#)

## Learn More

For details about KPIs and Objectives, see ["Objectives" on page 20](#)

### **Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab**

Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158.](#)

## Tasks

This section includes:

["Assign a KPI to an Objective " below](#)


["Objective's KPIs" above](#)

### **Assign a KPI to an Objective**

1. In the Active KPIs pane, select an Objective.
2. In the Configuration Details tab, click the **Add KPI** link.
3. In the **Assign KPI to Objective** dialog box, move the relevant KPI from the **Available KPIs** area to the **Assigned KPIs** area.
4. Click **OK**. The **Assign KPI to Objective** dialog box closes.
5. The KPI immediately appears in the Assigned KPIs list in the Configuration Details tab. The **Save** and **Discard** buttons are enabled. To save the changes click **Save**
6. The tree in the Active KPIs pane is refreshed and the changes are displayed.

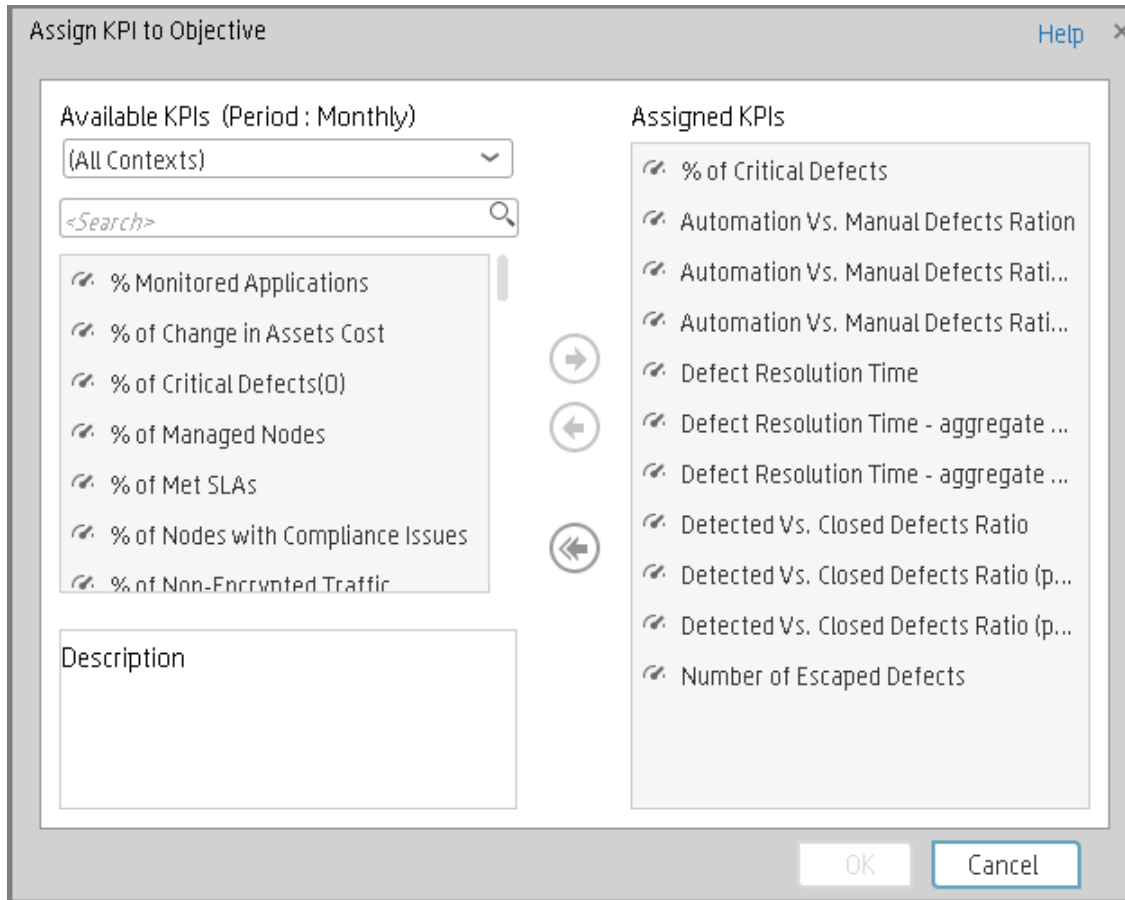
### **Unassign a KPI from an Objective**

1. In the Active KPIs pane, select an Objective.


2. In the Configuration Details tab, in the **Assigned KPIs** section, click the **Un-assign**  button for the relevant KPI. The KPI immediately disappears from the KPIs table.
3. To save the changes you must save the Objective by clicking **Save**.

## UI Description

### Assign KPIs to Objective Dialog Box



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

UI Element	Description
<b>Available KPIs</b>	<p>Lists the KPIs available to be assigned to the Objective.</p> <p>You can:</p> <ul style="list-style-type: none"> <li>• Select the relevant context in the <b>&lt;All Contexts&gt;</b> list to display the KPIs relevant for the selected context. The period in the title represents the filter performed on the list of KPIs, to display only the KPIs that you can assign to the objective (since the calculation period in the objective and KPIs under it must match).</li> <li>• Enter a string in the <b>&lt;Search&gt;</b> box to filter for the KPIs whose name includes the string.</li> </ul>
<b>Assigned KPIs</b>	<p>Lists the KPIs that you want to assign to the Objective.</p>
<b>Description</b>	<p>The description of the KPI selected in the Available KPIs area.</p>
	<p>Select the relevant KPI and move it to the relevant field using the buttons.</p>
<b>OK</b>	<p>Click to assign the selected KPIs. The list of KPIs in the Assigned KPIs area is immediately updated. The <b>Save</b> and <b>Discard</b> buttons become enabled. To save the changes you must save the Folder by clicking <b>Save</b>.</p>




# Delete a Node

You can permanently delete a node (Scorecard, Perspective, or Objective).

For details on deleting a KPI, see ["KPI or Metric Configuration and Calculation Details" on the next page](#).

## Permanently delete a node

1. In the Active KPIs pane, do one of the following:
  - Select the relevant node and click the **Delete the currently selected node** button  in the pane toolbar.
  - Right-click the relevant node and select the **Delete** menu option.
2. You are prompted to select one of the following options:
  - **Delete all elements including KPIs. KPIs that are assigned to Objectives in other subtrees will not be deleted.** Deleting the node also deletes its subtree and the KPIs in the subtree. KPIs that are assigned to Objectives in other subtrees are not deleted. If the KPIs in the subtree of the node you want to delete also belong to another subtree, the KPIs are not deleted from the other subtree.

**Example** If Objective A and B both include KPI C, when you delete Objective A, KPI C remains in Objective B's subtree.
  - **Delete all elements except for the KPIs.** Deleting the node also deletes its subtree but does not delete the KPIs in its subtree. These KPIs remain in the other subtree structures. They become Unassigned KPIs if they don't exist in any other subtrees.
2. When you are prompted to approve the deletion, click **Yes**. The tree is immediately updated.

# KPI or Metric Configuration and Calculation Details

You can activate a KPI or a Metric by dragging the KPI or Metric template to the Active KPIs pane. You can then modify the active copy in the Active KPIs pane.

You can also create a KPI or a Metric directly in the Active KPIs pane. For details, see ["Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" on page 59](#).

## To access:

Click a KPI or a Metric in the Active KPIs pane to display the **Configuration Details** tab and the **Calculation Details** tab for the selected KPI.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on page 92](#) ● ["UI Description" on page 94](#)

## Learn More

### About KPIs and Metrics

Key Performance Indicators (KPIs) and Metrics reflect and measure key drivers of business value. Value drivers represent activities that, when executed properly, guarantee future success. Value drivers move the organization in the right direction to achieve its stated financial and organizational goals.

**Example** Value drivers might be “high customer satisfaction” or “excellent product quality.”

### Additional information about KPIs and Metrics

A KPI is a Metric, but a Metric is not always a KPI. The key difference is that KPIs always reflect strategic value drivers whereas Metrics represent the measurement of any business activity. Metrics always show a number that reflects performance. KPIs put that performance in context. Metrics are not matched against a threshold.

KPIs reflect how well the organization is doing in areas that most impact financial measures valued by shareholders, such as profitability and revenues.

A KPI evaluates the performance according to expectations. The context is provided using:

1. **Thresholds.** Upper and lower ranges of acceptable performance.
2. **Targets.** Predefined gains, such as 10% new customers per quarter.
3. **Benchmarks.** Based on industry wide measures or various methodologies, such as Six Sigma.
4. **Trend.** The direction of the performance of the KPI, either “up,” “down,” or “static.”

**Example** A metric could be an MTTR (mean time to recover) which measures the average time between the occurrence of a set of incidents and their resolution. An example of a KPI could be an MTTR, which measures the average time between the occurrence of a set of incidents and their resolution, compared to a defined threshold. For example: 'MTTR less than one hour'.

KPIs measure key drivers of business values using a formula. For details, see ["KPI and Metric Formula and Filter, Threshold, Value, Trend, and Score" on page 22](#).

KPI templates (out of the box) help you create new KPIs by activating the KPI templates. Metric templates (out-of-the-box) help you create new Metrics by activating the Metric templates. For details, see ["Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 54](#).

A complete list of KPIs and Metrics is available in [KPI Library in Excel format](#) and in the [KPIs, Metrics, Contexts, and Data Source Integrations](#) in the *IT Executive Scorecard KPIs, Metrics, and Data Lineage Reference Guide*.

## Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab

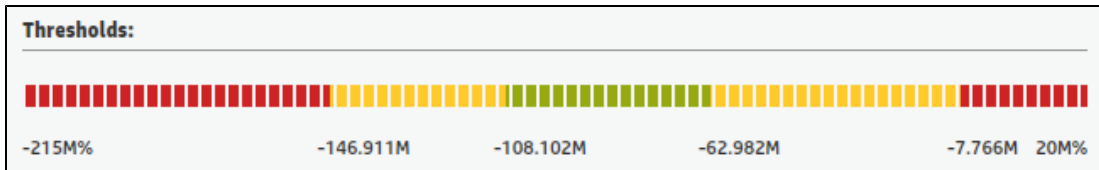
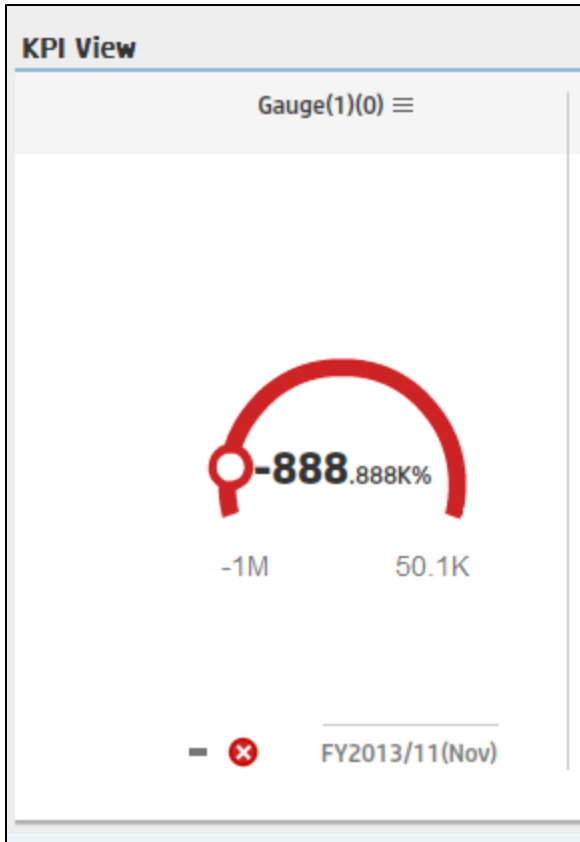
Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158](#).

**Note:** All the values and thresholds of the Studio KPIs depend on their definition in the Configuration details and Calculation details tabs. You can modify the definitions.

## Decimal Precision

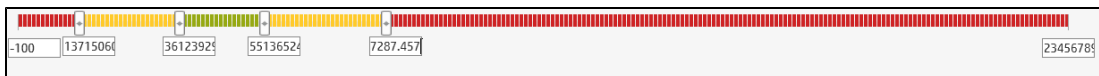
The decimal precision used in displays in Executive Scorecard is as follows:

- **Studio/Dashboard/Explorer Active Tree/Thresholds in Explorer.** The values of KPIs and Metrics are displayed with a maximum of 6 digits and if needed a decimal point. Digits after the decimal point are rounded to 3 digits maximum. Digits before the decimal point are rounded to 3 digits maximum and K, M, or T are used to indicate the correct value. For example: 456.7893 is rounded to 456.789, 3300122.111 is displayed as 3.300 M, or 999999 is displayed as 999.999 K



- **Thresholds in Studio.**

Because the threshold fields in the Studio are where you enter the threshold values, the thresholds display all the digits before the decimal point. Nevertheless, if you configure a KPI threshold with more than 3 digits after the decimal point, they are rounded to 3 digits. For example:



## Tasks

This section includes:

["Display and modify a KPI or a Metric properties" on the next page](#)

### Display and modify a KPI or a Metric 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 Metric** button to check if the current configuration gives you the expected result.

# UI Description

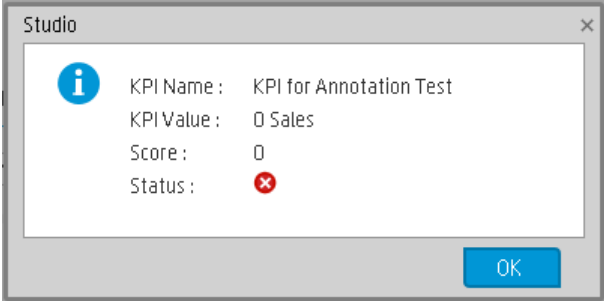

## Calculation Details Tab

The screenshot shows the 'Calculation details' tab in a software interface. It features several sections: 'Business Context' with a dropdown menu and a 'Select business context' button; 'Formula' with a text input field containing a SQL-like formula and buttons for 'Open Formula Builder' and 'Validate'; 'Filter' with a text input field containing a placeholder and buttons for 'Open Filter Builder' and 'Validate'; and 'Comments' with a text input field containing 'Default COMMENTS'. At the bottom, there are buttons for 'Test KPI', 'Save', and 'Discard'. A 'Navigate to the source template' link is located in the top right corner.

### General Information

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

UI Element	Description
<b>Navigate to the source template</b>	Moves the cursor to the template that was used to create the current KPI, in the KPI Library pane. The details of the template are displayed in the Configuration Details pane.

UI Element	Description
<b>Test KPI</b>	<p>After you make changes to the KPI configuration, click <b>Save</b> to save your changes. The <b>Test KPI</b> button is enabled. Click it to test the changes you made to the KPI configuration. The KPI value is calculated and displayed in a popup window. The window displays the new value, score, and status of the modified KPI. The result is not saved to the database.</p>  <p>The button is disabled for KPI Breakdowns.</p>
<b>Save</b>	Click to save the changes.
<b>Discard</b>	Click to discard the changes you have made since the last Save operation.
	Click to refresh the display.

### Business Context

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

UI Element	Description
<b>&lt;Business context&gt;</b>	<p>The box displays the Context you selected.</p> <p>You can use additional variables and entities by creating Contexts using Context Designer. For details, see <a href="#">Semantic Layer - Create and Manage Contexts Using Context Designer and Upload Data Using Data Loader</a> in the <i>IT Executive Scorecard Administrator Guide</i>.</p> <div style="background-color: #f0f0f0; padding: 10px; border: 1px solid #ccc;"> <p><b>Note:</b> If you have assigned to a KPI a Context created with the Context Designer, and then you modify the Context name in the Context Designer, make sure that you assign the modified Context to the KPI in the Studio otherwise the KPI becomes invalid as it uses a Context that does not exist.</p> </div>

UI Element	Description
<b>Select business context</b>	<p>Click to open the Business Context dialog box, where you select the Business Context. That selection determines the business entities that are the basis of the calculation of the KPI value and defines the entities used in the formula. For details, see <a href="#">Business Contexts</a>.</p> <p>This link is displayed only when no KPI Breakdown has been defined for the KPI. If the KPI already has a Breakdown KPI then a message indicates why you cannot change the Context.</p>

### Formula

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

UI Element	Description
<b>KPI Formula</b>	The formula used to calculate the value of the KPI.
<b>Validate</b>	Click to validate the formula that appears in the Formula box.
<b>Open Formula Builder</b>	Click to open the <b>Formula Builder</b> dialog box where you can build the relevant formula to calculate the value of the KPI. For user interface details, see " <a href="#">KPI or Metric Formula</a> " on page 104

### Filter

You use the Filter area to limit the range of data used for the KPI's calculation.

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

UI Element	Description
<b>Filter</b>	Specify the filter to limit the range of data you want the KPI to be calculated on.
<b>Validate</b>	Click to validate the filter.
<b>Open Filter Builder</b>	Click to open the <b>Filter Builder</b> dialog box where you can build the relevant filter that limits the range of the data the KPI calculation is based on. For user interface details, see " <a href="#">KPI or Metric Filter</a> " on page 129

### Comments

Use the Comments area to enter a description of the formula and its purpose in your own words.



## Configuration Details Tab

**Configuration details** | Calculation details

[Navigate to the source template](#)

**Name :** % of Applications Availability **Unit :** %

**Description :** The number of available applications relative to the total number of applications during the measurement period.

**Calculation period :** Monthly

**Result Threshold**

**Direction :** Maximize  Include marginal status (Warning)

90 95 99 100

**Additional Details**

**Business Motivation :** Make sure our application availability procedures are efficient.

**Additional Info :**

Name	URL
No data to display	




[Add](#)

Test KPI Save Discard

### General Information

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

UI Element	Description
<b>Navigate to the source template</b>	Moves the cursor to the template that was used to create the active KPI/Metric, in the KPI/Metric Library pane. The details of the template are displayed in the Configuration Details pane.  This option is disabled for KPI/Metric Breakdowns.

UI Element	Description
<p><b>Test KPI/Metric</b></p>	<p>After you change the KPI/Metric configuration, click <b>Save</b> to save your changes. The <b>Test KPI/Metric</b> button is enabled. Click it to test the changes you made to the KPI/Metric configuration. The KPI/Metric value is calculated and displayed in a popup window. The window displays the new value, score, and status of the modified KPI/Metric. The result is not saved to the database.</p> <div data-bbox="456 495 1255 894" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p>Studio <span style="float: right;">×</span></p> <div style="border: 1px solid gray; padding: 5px; margin: 5px 0;"> <p> KPI Name : KPI for Annotation Test                  KPI Value : 0 Sales                  Score : 0                  Status : </p> </div> <p style="text-align: right;"><span style="background-color: #0070C0; color: white; padding: 5px 15px; border-radius: 3px;">OK</span></p> </div> <p><b>Note:</b> The button is disabled for KPI/Metric Breakdowns.</p> <p>For details on calculations, see <a href="#">"KPI and Metric Formula and Filter, Threshold, Value, Trend, and Score"</a> on page 22.</p>
<p><b>Save</b></p>	<p>Click to save the changes.</p>
<p><b>Discard</b></p>	<p>Click to discard the changes you have made since the last <b>Save</b> operation.</p>
<p></p>	<p>Click to refresh the display.</p>

### General - KPI/Metric

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

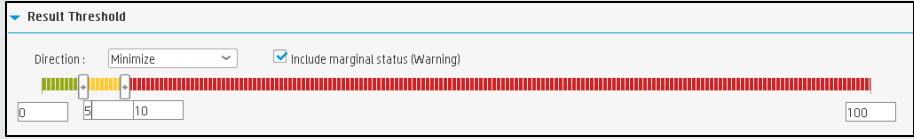
UI Element	Description
<b>Name</b>	<p>The name of the KPI/Metric or of the KPI/Metric template.</p> <p><b>Limitations:</b></p> <ul style="list-style-type: none"> <li>• The characters: \ / : * ? " &lt; &gt;   are not supported.</li> <li>• The maximum number of characters is 240.</li> </ul> <p><b>Tip:</b></p> <ul style="list-style-type: none"> <li>• If you change the name of a KPI that has KPI Breakdowns or the name of a Metric that has Metric Breakdowns, you must perform a new calculation to update names of their overrides. For details about overrides, see "<a href="#">KPI and Metric Breakdown Overrides</a>" on page 172.</li> <li>• The names of the KPI or Metric Breakdowns are not automatically updated after you change the name of the KPI or Metric parent even after a new calculation. You must access the Studio and manually change the names of the KPI or Metric Breakdowns to match the new parent KPI or Metric names.</li> </ul>
<b>Unit</b>	The unit of the KPI/Metric value.
<b>Description</b>	<p>The description of the KPI/Metric.</p> <p><b>Limitations:</b> The maximum number of characters is 1000.</p>
<b>Calculation Period</b>	<p>The time period used to calculate the value of the KPI/Metric (using the formula specified in the Calculation details tab). It can be: <b>Yearly</b>, <b>Quarterly</b>, <b>Monthly</b>, <b>Weekly</b>, or <b>Daily</b>.</p> <p>If you select <b>Daily</b> for the Calculation Period of a KPI/Metric, and if the KPI/Metric formula contains <b>in_period(-XX)</b>, <b>end_period(-XX)</b>, or <b>Period_entity = Period (-XX)</b>, XX must be less than or equal to <b>365</b>.</p>
<b>Id</b>	<p>The ID of the KPI/Metric. It is automatically assigned.</p> <p>This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b>, and in <b>Debug Mode</b>, select the <b>Application Debug Mode</b> setting.</p>
<b>Type</b>	<p>The type of the KPI/Metric. It is automatically assigned.</p> <p>This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b>, and in <b>Debug Mode</b>, select the <b>Application Debug Mode</b> setting.</p>

## Result Threshold

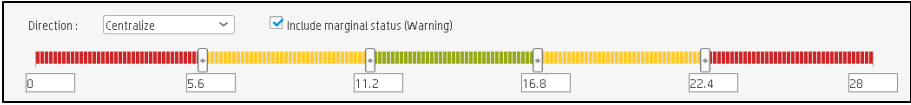
User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets>):

**Note:** This section is not relevant for Metrics.

UI Element	Description
<b>Direction</b>	<p>Select:</p> <ul style="list-style-type: none"><li>• <b>Centralize.</b> When the status of the KPI is best when it has either a specific value or its value is in a specific range, and higher or lower values are worse.</li><li>• <b>Minimize.</b> When the status of the KPI is best when it is low.</li><li>• <b>Maximize.</b> When the status of the KPI is best when it is high.</li></ul> <p><b>Example</b></p> <ul style="list-style-type: none"><li>• If you are measuring the Employee Attrition rate, the lower the value the best the attrition rate, so you would select <b>Direction=Minimize</b>.</li><li>• If you are measuring revenue, the higher the value, the best the revenue, so you would select <b>Direction=Maximize</b>.</li></ul>


UI Element	Description
<p><b>Threshold</b></p>	<p>Slide the arrows to select the relevant thresholds in the boxes attached to the arrows. The threshold is used to assign a status to the KPI. For details on statuses, see <a href="#">"KPI and Metric Formula and Filter, Threshold, Value, Trend, and Score" on page 22</a>.</p> <p>You can also enter the value by typing text in the box. The slider adjusts automatically.</p> <p>You can leave the lowest and highest ends empty to indicate an infinite value (minus infinity and plus infinity). In such a case, the threshold uses the lowest and highest historical values of the KPI or of the KPI template.</p> <p>All the threshold values use of the lowest and highest ends uses float precision (Java Floating Point), so for example, a value of 999999 is rounded to 1000000.</p> <div data-bbox="435 789 1369 1140" style="border: 1px solid gray; padding: 10px; background-color: #f0f0f0;"> <p><b>Example</b> As the measurement unit of the Employee Attrition rate is a percentage, the limits of the threshold are 0 and 100. You can decide that a good attrition rate for your company or group is between 0% to 5% (green), a warning rate is between 5% and 10% (yellow), and a bad rate is between 10% and 100% (red).</p>  </div> <p>The Threshold fields are validated when you enter values. The values must increase from left to right.</p> <p><b>Decimal Precision</b></p> <p>The decimal precision used in displays in Executive Scorecard is as follows:</p> <ul style="list-style-type: none"> <li>● <b>Studio/Dashboard/Explorer Active Tree/Thresholds in Explorer.</b> The values of KPIs and Metrics are displayed with a maximum of 6 digits and if needed a decimal point. Digits after the decimal point are rounded to 3 digits maximum. Digits before the decimal point are rounded to 3 digits maximum and K, M, or T are used to indicate the correct value. For example: 456.7893 is rounded to 456.789, 3300122.111 is displayed as 3.300 M, or 999999 is displayed as 999.999 K</li> </ul>

UI Element	Description
	<div data-bbox="467 338 1049 1171"> </div> <div data-bbox="467 1207 1385 1348"> </div> <ul style="list-style-type: none"> <li> <b>Thresholds in Studio.</b> <p>Because the threshold fields in the Studio are where you enter the threshold values, the thresholds display all the digits before the decimal point. Nevertheless, if you configure a KPI threshold with more than 3 digits after the decimal point, they are rounded to 3 digits. For example:</p> </li> </ul> <div data-bbox="467 1612 1385 1675"> </div>

UI Element	Description
<b>Include marginal status (Warning)</b>	<p>Select when the status of the KPI can be <b>Good, Warning, or Error</b>.</p> <p>Clear when the status of the KPI is either <b>Good, or Error</b>.</p> <p>When you select <b>Direction=Centralize</b> and the <b>Include marginal status (yellow)</b> option, the thresholds include two warning areas as follows:</p>  <p>The Threshold fields are validated when you enter values. The values must increase from left to right.</p>

### Additional Details

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

UI Element	Description
<b>Business Motivation</b>	<p>Enter the business motivation of the KPI.</p> <p>This section is not relevant for Metrics.</p>
<b>Additional Info</b>	<p>Lists the additional information available for the KPI. It can be links to BO or Xcelsius reports, external links, or links to Dashboard pages.</p> <p>The table includes:</p> <ul style="list-style-type: none"> <li>• <b>Name.</b> The name of the link or the reports.</li> <li>• <b>URL.</b> The hyperlink to access additional external information.</li> <li>• Click the link to open the Edit Info Link dialog box where you can edit the selected additional information. For details, see "<a href="#">KPI or Objective Additional Information</a>" on page 177.</li> <li>•  Click to delete the selected additional information.</li> </ul>
<b>Owner</b>	<p>The owner of the active KPI.</p> <p>The list of available owners corresponds to the users that were defined in <b>Admin &gt; Users and Roles &gt; User Management</b>. For details, see <a href="#">Manage Users</a> in the <i>IT Executive Scorecard Administrator Guide</i>.</p>
<b>Add</b>	<p>Click to open the <b>Add Info Link</b> dialog box where you can add additional information for the KPI. For details, see "<a href="#">KPI or Objective Additional Information</a>" on page 177.</p>

# KPI or Metric Formula

You can change the existing formula of a KPI or Metric to customize it to the end-user's needs. You can also create a formula to calculate the value of the KPI or Metric .

In addition you can restrict the range of the formula by selecting, in the filter, specific values for the variables used in the formula. For details, see ["KPI or Metric Filter" on page 129](#).

## To access:

Click **Open Formula Builder** in the Calculation Details tab in the Properties pane of a KPI or Metric .

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on page 111](#) ● ["UI Description" on page 115](#)

## Learn More

### Formulas, Filters, Thresholds, Values, Trend, and Score

The KPI engine calculates the **value** of the KPI using the **formula** specified for the KPI and provides the KPI's **status** and **score** using the thresholds specified for the KPI. You can also build KPI filters to restrict the range of the formula by selecting specific values for the variables used in the formula. For details, see ["KPI and Metric Formula and Filter, Threshold, Value, Trend, and Score" on page 22](#)

### Important Information

- The KPI or Metric Formula language is not case-sensitive.
- Field values are case-sensitive.
- Formulas include single quotes only for entity field values and string primitives (numbers, characters between double-quotes, and dates).
- During calculation, formulas are converted into SQL queries that run on the database.

You can use additional variables and entities by creating business contexts using Context Designer. For details, see ["Create and Manage Contexts Using Context Designer"](#) in the *IT Executive Scorecard Administrator Guide*.

### Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab

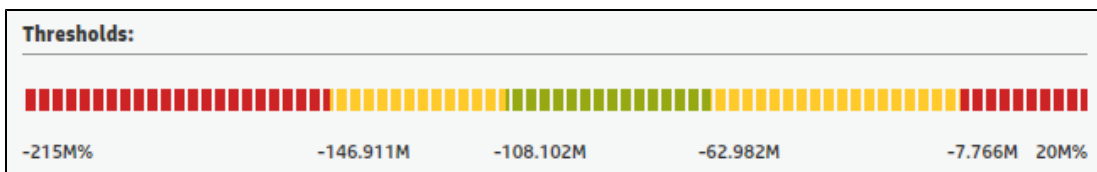
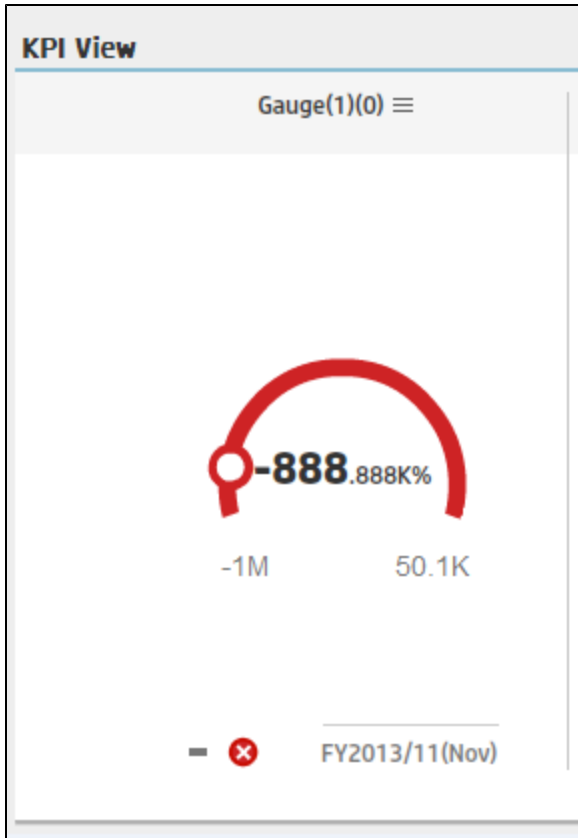
Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158](#).



## Decimal Precision

The decimal precision used in displays in Executive Scorecard is as follows:

- **Studio/Dashboard/Explorer Active Tree/Thresholds in Explorer.** The values of KPIs and Metrics are displayed with a maximum of 6 digits and if needed a decimal point. Digits after the decimal point are rounded to 3 digits maximum. Digits before the decimal point are rounded to 3 digits maximum and K, M, or T are used to indicate the correct value. For example: 456.7893 is rounded to 456.789, 3300122.111 is displayed as 3.300 M, or 999999 is displayed as 999.999 K



- **Thresholds in Studio.**

Because the threshold fields in the Studio are where you enter the threshold values, the thresholds display all the digits before the decimal point. Nevertheless, if you configure a KPI threshold with more than 3 digits after the decimal point, they are rounded to 3 digits. For

example:



## Link between Contexts and KPI or Metric Formulas

When you create a Context, you select tables, create links between the tables, and select the relevant columns in the tables to be part of the Context. For details, see [Semantic Layer - Create and Manage Contexts Using Context Designer and Upload Data Using Data Loader](#) in the *IT Executive Scorecard Administrator Guide*.

When you create a KPI or a Metric you assign them a Context in the Studio. The Context tables become variables that you can use when creating KPI or Metric formulas, and the table columns become the variable entities.

For example the **% of Reopened Defects** KPI has the following formula:

**RATIO\_MATH(COUNT\_DISTINCT( DefectHist.Defect , DefectHist.ReopenFlag =1 And Defect.Status <> 'Closed') , COUNT( Defect ,Defect.DefectSummary<> 'INVALID' And Defect.DefectSummary<> 'UNKNOWN' ),0)\*100**

Its definition is:

The screenshot shows the configuration details for the '% of Reopened Defects' KPI. The interface includes a left sidebar with a tree view of Active KPIs, a main configuration area with tabs for 'Configuration details' and 'Calculation details', and a bottom section for 'Additional Details'. The 'General - KPI' section shows the name, description, and unit. The 'Result Threshold' section shows the direction (Minimize) and a threshold bar. The 'Additional Details' section shows business motivation and a table for additional info.

The Business Context is ALM\_Defect.

Click **Admin > Semantic Layer** and open the ALM\_Defect Context:

The screenshot displays the 'Context Management' interface within the Semantic Layer. On the left is a navigation sidebar with the following items: Semantic Layer (highlighted), Users and Roles, Data Source Management, ETL Management, Foundation, Data Warehouse, Scorecard, ITFM, Semantic Layer (highlighted), and Content Acceleration Pack. The main content area is titled 'Context Management' and includes a 'Launch Context Designer' button. Below the button is a list of contexts, each with a checkbox and a tooltip. The 'ALM\_Defect' context is selected, and its tooltip shows 'ALM\_Defect'. Other contexts in the list include ALM\_Requ, ALM\_Test, ApplicationPerformance, ApplicationPortfolioManagement, AssetManagement, AvailabilityManagement, ChangeManagement, CloudOptimization, CloudOptimizationDemo, DataProtection, DemandManagement, FinancialManagement, IncidentManagement, Link\_Test\_Context, NetworkNodeManager, and OrchestrationAutomation.

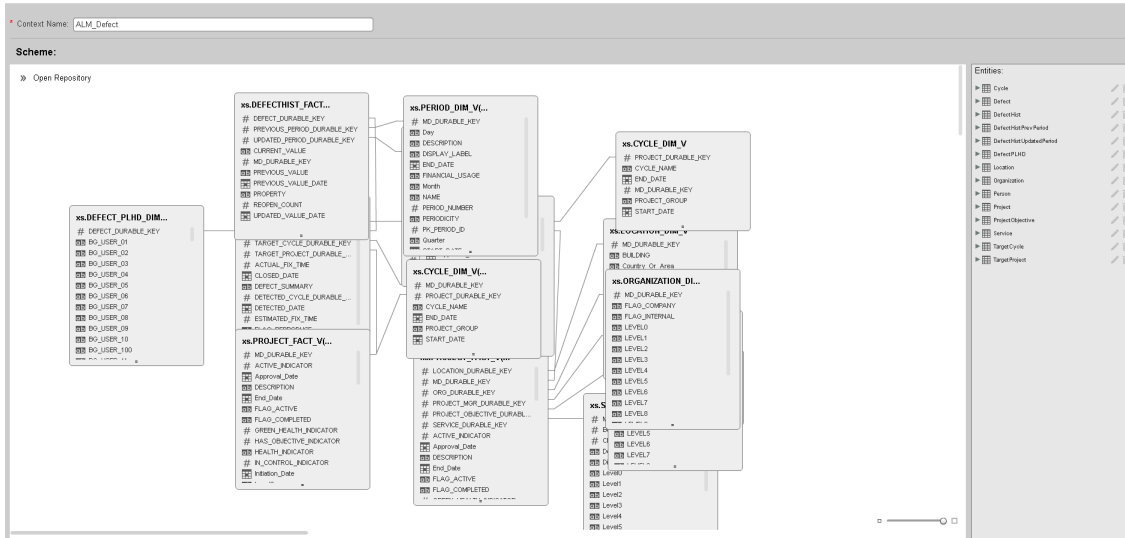
**Context Management**

The Context Designer enables you to create and manage business contexts (universes). Contexts can include your target schema tables or .CSV files that you can upload to the target schema using Context Designer. Double-click a context in the list below to open its configuration.

Launch Context Designer

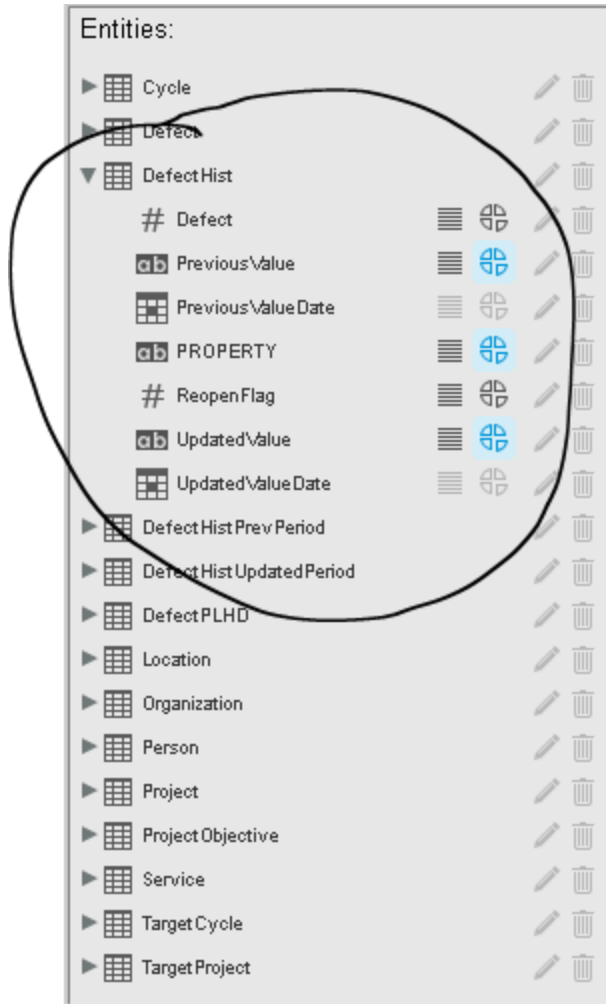
- Context Name
- ALM\_Defect
- ALM\_Requ
- ALM\_Test
- ApplicationPerformance
- ApplicationPortfolioManagement
- AssetManagement
- AvailabilityManagement
- ChangeManagement
- CloudOptimization
- CloudOptimizationDemo
- DataProtection
- DemandManagement
- FinancialManagement
- IncidentManagement
- Link\_Test\_Context
- NetworkNodeManager
- OrchestrationAutomation
- Period\_Universe

The contents of the Context including the ALM tables is displayed:



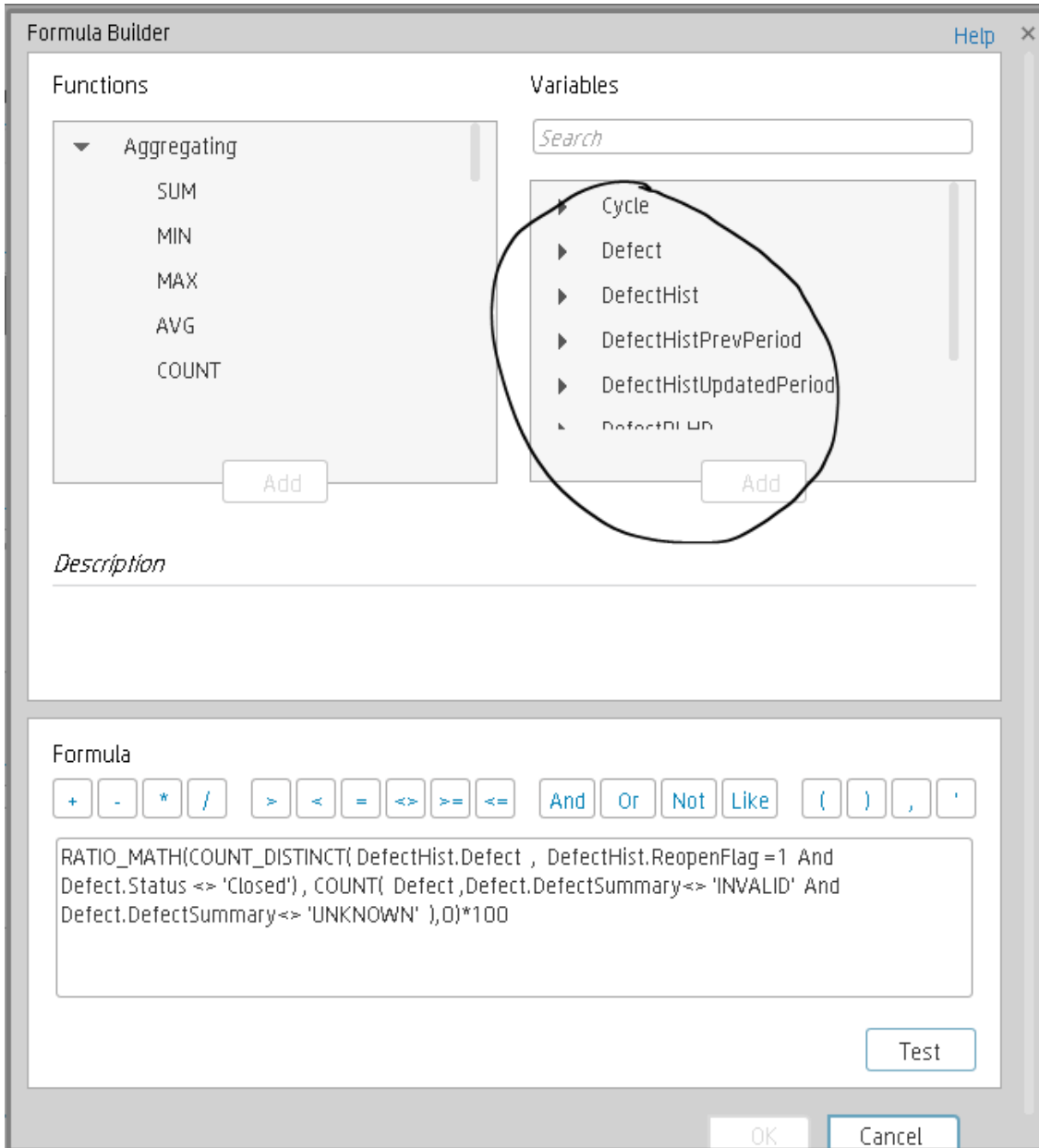
In the Entities area on the right, you can see the tables and the table columns that were selected to be part of the ALM\_Defect Context itself.

It is recommended that the person who creates the KPI or Metric formula should be familiar with the ALM entities that are used in the ALM\_Defect context as the XS documentation does not provide that information:

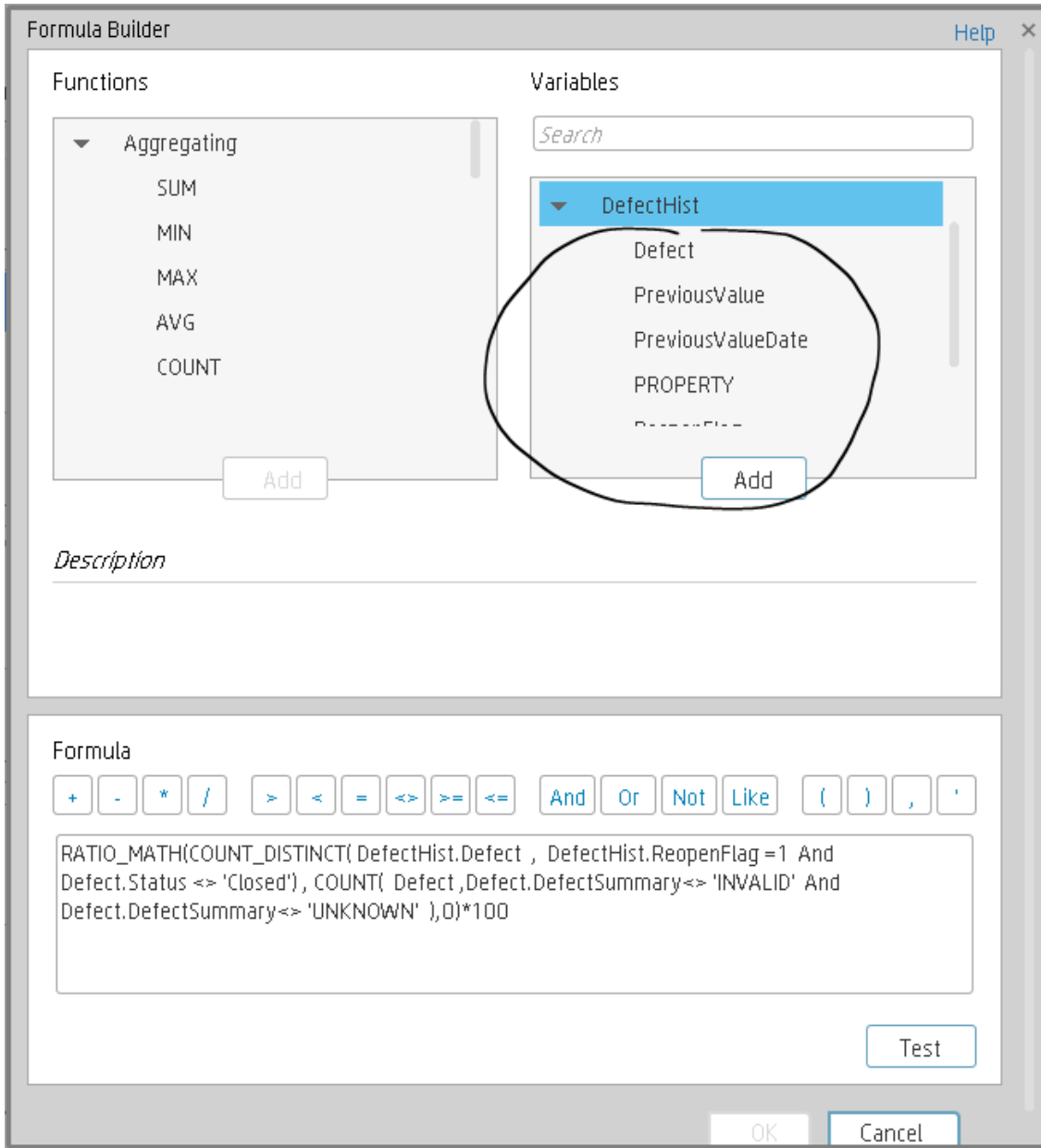


The **Defect\_Hist** table corresponds to one of the entities (**DefectHist**) that appears in the list of Variables that can be used when creating or modifying the formula of a KPI based on the **ALM\_Defect** context. To access the KPI or Metric formula, click **Studio**, highlight the relevant KPI (**% of Reopened Defects** for example), click the **Calculation Details** tab, and then click **Open Formula builder**.

The variables you see in the formula builder correspond to the Entities in the Context Designer (above) and correspond to the <EntityName> in the syntax of the formulas (as explained in "KPI or Metric Formula" on page 104 in the *IT Executive Scorecard Business Analyst Guide*).



When you expand a variable, the items you see below correspond to the fields (in the Context Designer) and correspond to the <FieldName> items in the formulas syntax (as explained in "KPI or Metric Formula" on page 104 in the *IT Executive Scorecard Business Analyst Guide*).



## Tasks

This section includes the following tasks:

["Configure a KPI or a Metric formula" on the next page](#)

["Use-Case for IN\\_PERIOD" on page 113](#)

## Configure a KPI or a 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 [Movies](#).

### Use-Case for IN\_PERIOD

The IN\_PERIOD formula is: <EntityName>.<FieldName> IN\_PERIOD

You use IN\_PERIOD in Filter expressions to specify the condition relative to the start of the calculation period defined for the KPI or Metric . The condition is related to the KPI or Metric time period.

If, for example, you want to count the number of incidents that occur per month using the Incident KPI which is a monthly KPI, you can use the following formulas:

Formulas	Results for			
	June	July	August	September
COUNT (INCIDENT, *)	20	25	12	17
COUNT(INCIDENT, INCIDENT.OPEN_DATE = IN_PERIOD)	20	25	12	17

When performing a Calculation on the Context related to the INCIDENT KPI, the results stay the same.

Formulas	Results for			
	June	July	August	September
COUNT (INCIDENT, *)	22	23	13	16
COUNT(INCIDENT, INCIDENT.OPEN_DATE = IN_PERIOD)	22	23	13	16

When performing a Recalculation on the Context related to the INCIDENT KPI:

- The results for COUNT(INCIDENT, INCIDENT.OPEN\_DATE IN\_PERIOD) are correct because the values are recalculated for each month separately.
- The results for COUNT (INCIDENT, \*) are incorrect, as the formula counts ALL the incidents in the system without any time filtering (for example: 90) and replaces the values for each one of the months above with 90.

Formulas	Results for			
	June	July	August	September
COUNT (INCIDENT, *)	90	90	90	90
COUNT(INCIDENT, INCIDENT.OPEN_DATE = IN_ PERIOD)	20	19	10	10

## UI Description

### Formula Builder Dialog Box



#### Note about the order of operations in formulas:

If more than one operator is used in a formula, Executive Scorecard follows a specific order to perform these mathematical operations. This order of operations can be changed by adding brackets to the equation. The order of operations is:

1. Functions (aggregations and others)
2. Brackets
3. Division
4. Multiplication
5. Addition
6. Subtraction

### Functions

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

UI Element	Description
<b>Functions</b>	<ul style="list-style-type: none"><li>• <b>Aggregating.</b> The list of aggregating functions you can use in the KPI or Metric formula. For details, see <a href="#">"Aggregating Functions" on the next page</a>.</li><li>• <b>Mathematical.</b> The list of mathematical functions you can use in the KPI or Metric formula. For details, see <a href="#">"Mathematical Functions" on page 120</a>.</li><li>• <b>Date Constants.</b> The list of date constants you can use in the KPI or Metric formula. For details, see <a href="#">"Date constant" on page 123</a>.</li></ul>
<b>Add</b>	<ul style="list-style-type: none"><li>• Click the <b>Add</b> button under the Functions box to add the selected function to the formula box at the end of the current expression.</li><li>• Click the <b>Add</b> button under the Variables box to add the selected variable to the formula box at the end of the current expression.</li></ul>

- **Aggregating Functions**

The aggregating functions are as follows:

UI Element	Description
<p><b>SUM</b></p>	<p><b>Formula:</b> SUM(&lt;EntityName&gt;.&lt;FieldName&gt;, &lt;Filter Expression&gt;)</p> <p>Returns the sum of the field values of the entities that satisfy the condition specified in the Filter Expression.</p> <p><b>Example</b> SUM(Cost.Amount, Cost.CostType="Actual")</p> <p><b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace &lt;Filter Expression&gt; with a "*" (star).</p> <p><b>Example</b> If the Cost Type values are <b>Actual</b> and <b>Planned</b>, instead of <b>SUM(Cost.Amount, Cost.CostType="Actual" or Cost.CostType="Planned")</b> write <b>SUM(Cost.Amount, * )</b>.</p>
<p><b>MIN</b></p>	<p><b>Formula:</b> MIN(&lt;EntityName&gt;.&lt;FieldName&gt;, &lt;Filter Expression&gt;)</p> <p>Returns the lowest value of the field values of the entities that satisfy the condition specified by the Filter Expression.</p> <p><b>Example</b> MIN(Cost.Amount, Cost.CostType="Actual")</p> <p><b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace &lt;Filter Expression&gt; with a "*" (star).</p> <p><b>Example</b> If, for example, the Cost Type values are <b>Actual</b> and <b>Planned</b>, instead of <b>MIN(Cost.Amount, Cost.CostType="Actual" or Cost.CostType="Planned")</b> write <b>MIN(Cost.Amount, * )</b>.</p>

UI Element	Description
<p><b>MAX</b></p>	<p><b>Formula:</b> MAX(&lt;EntityName&gt;.&lt;FieldName&gt;, &lt;Filter Expression&gt;)</p> <p>Returns the highest value of the field values of the entities that satisfy the condition specified by the Filter Expression.</p> <p><b>Example</b> MAX(Cost.Amount, Cost.CostType="Actual")</p> <p><b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace &lt;Filter Expression&gt; with a "*" (star).</p> <p><b>Example</b> If the Cost Type values are <b>Actual</b> and <b>Planned</b>, instead of <b>MAX(Cost.Amount, Cost.CostType="Actual" or Cost.CostType="Planned")</b> write <b>MAX(Cost.Amount, * )</b>.</p>
<p><b>AVG</b></p>	<p><b>Formula:</b> AVG (&lt;EntityName&gt;.&lt;FieldName&gt;, &lt;Filter Expression&gt;)</p> <p>Returns the average of the field values of the entities that satisfy the condition specified by the Filter Expression.</p> <p><b>Example</b> AVG(Cost.Amount, Cost.CostType="Actual")</p> <p><b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace &lt;Filter Expression&gt; with a "*" (star).</p> <p><b>Example</b> If the Cost Type values are <b>Actual</b> and <b>Planned</b>, instead of <b>AVG(Cost.Amount, Cost.CostType="Actual" or Cost.CostType="Planned")</b> write <b>AVG(Cost.Amount, * )</b>.</p>

UI Element	Description
<p><b>COUNT</b></p>	<p><b>Formula:</b> COUNT (&lt;Entity Name&gt;, &lt;Filter Expression&gt;)</p> <p>Returns the number of entities that satisfy the condition specified by the Filter Expression.</p> <p><b>Example</b> COUNT(Cost, Cost.CostType ='Actual')</p> <p><b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace &lt;Filter Expression&gt; with a "*" (star).</p> <p><b>Example</b> If the Cost Type values are <b>Actual</b> and <b>Planned</b>, instead of <b>COUNT(Cost.Amount, Cost.CostType="Actual" or Cost.CostType="Planned")</b> write <b>COUNT(Cost.Amount, * )</b>.</p>
<p><b>COUNT_DISTINCT</b></p>	<p><b>Formula:</b> COUNT_DISTINCT (&lt;Entity Name&gt;.&lt;Field Name&gt;, &lt;Filter Expression&gt;)</p> <p>Returns the number of distinct values of the field in all the entities that satisfy the condition specified by the Filter Expression.</p> <p><b>Example</b> COUNT_DISTINCT(Service.Name, Service.Name &lt;&gt; 'UNKNOWN')</p> <p><b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace &lt;Filter Expression&gt; with a "*" (star).</p> <p><b>Example</b> If the Cost Type values are <b>Actual</b> and <b>Planned</b>, instead of <b>COUNT(Service.Name.Service.Name, Cost.CostType="Actual" or Cost.CostType="Planned")</b> write <b>COUNT (Service.Name.Service.Name, * )</b>.</p>

UI Element	Description
<p><b>PERCENTAGE</b></p>	<p><b>Formula:</b> PERCENTAGE (&lt;Entity Name&gt;, &lt;Filter Expression1&gt;, &lt;Filter Expression2&gt;, defaultValue)</p> <p>Returns the ratio, expressed as percentage, of the number of entities that satisfy the condition specified by Filter Expression1 to the number of entities that satisfy the condition specified by Filter Expression 2.</p> <p><b>defaultValue</b> is optional and can be either an integer or a float number. By default, the defaultValue is 0; this is the value that is returned if the denominator equals 0. You can change the default value.</p> <div style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p><b>Example</b> PERCENTAGE(Cost, Cost.CostType ="Actual", Cost.CostType ="Planned", 0)</p> </div> <div style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace &lt;Filter Expression&gt; with a "*" (star).</p> </div> <div style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p><b>Example</b> If the Cost Type values are <b>Actual</b> and <b>Planned</b>, instead of <b>PERCENTAGE(Cost, Cost.CostType="Actual", Cost.CostType="Actual" or Cost.CostType="Planned", 0)</b> write <b>PERCENTAGE (Cost, Cost.CostType="Actual", * , 0)</b>.</p> </div>

- **Mathematical Functions**

The mathematical functions are as follows:

UI Element	Description
<p><b>SUM_MATH</b></p>	<p><b>Formula:</b> SUM_MATH (arg1, arg2, arg3, ...)</p> <p>Returns the sum of the set of arguments.</p> <div style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p><b>Example</b> SUM_MATH(6.36, 11.02, 51, -2.44, MAX (Cost.Amount, Cost.CostType='Actual'))</p> </div>



UI Element	Description
<b>MIN_MATH</b>	<p><b>Formula:</b> MIN_MATH (arg1, arg2, ...)</p> <p>Returns the lowest value of the set of arguments.</p> <div data-bbox="548 449 1369 594" style="background-color: #f0f0f0; padding: 5px;"> <p><b>Example</b> MIN_MATH(SUM(Cost.Amount, Cost.CostType = 'Actual'), SUM(Cost.Amount, Cost.CostType = 'Planned'))</p> </div>
<b>MAX_MATH</b>	<p><b>Formula:</b> MAX_MATH (arg1, arg2, ...)</p> <p>Returns the highest value of the set of arguments.</p> <div data-bbox="548 747 1369 892" style="background-color: #f0f0f0; padding: 5px;"> <p><b>Example</b> MAX_MATH(COUNT(Incident, Incident.Status='Open'), COUNT(Incident, Incident.Status='Reopened'))</p> </div>
<b>AVG_MATH</b>	<p><b>Formula:</b> AVG_MATH (arg1, arg2, ...)</p> <p>Returns the arithmetic average of the set of arguments.</p> <div data-bbox="548 1047 1369 1155" style="background-color: #f0f0f0; padding: 5px;"> <p><b>Example</b> AVG_MATH(6.36, 11.02, 51, -2.44, SUM(Cost.Amount, Cost.CostType='Actual'))</p> </div>
<b>PERCENTAGE_MATH</b>	<p><b>Formula:</b> PERCENTAGE_MATH(numerator,denominator, defaultValue)</p> <p>Returns the ratio, expressed as percentage of arguments: (numerator / denominator) * 100.          defaultValue is optional and can be either an integer of a float number.</p> <p>By default, the defaultValue is 0; this is the value that is returned if the denominator equals 0. You can change the default value.</p> <div data-bbox="548 1476 1369 1583" style="background-color: #f0f0f0; padding: 5px;"> <p><b>Example</b> PERCENTAGE_MATH(Defect, Defect.severity = "High", *)</p> </div>

UI Element	Description
<b>RATIO_MATH</b>	<p><b>Formula:</b> RATIO_MATH(numeratorVal,denominatorVal, defaultVal)</p> <p>The function divides numerator by denominator. If denominator is 0 then the function returns defaultVal, or zero if &lt;defaultVal&gt; is not provided.            defaultVal is optional and can be either an integer or a float number.</p> <p>By default, the defaultVal is 0; this is the value that is returned if the denominator equals 0. You can change the default value.</p> <div style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p><b>Example</b> RATIO_MATH(SUM              (Cost.Amount, Cost.CostType= 'Actual' ),              SUM(Cost.Amount, Cost.CostType= 'Planned' ), 0)</p> </div>
<b>DATE_CONVERT</b>	<p><b>Formula:</b>            DATE_CONVERT(&lt;sourceFormat&gt;, &lt;destinationFormat&gt;,            &lt;Mathematical Date Function&gt;)</p> <p>Converts the results of &lt;Mathematical Date Function&gt; from the source format into the destination format.</p> <p>Source Format can be one of the following: 'MS', 'S', 'M', 'H'.</p> <p>Destination Format can be one of the following: 'S', 'M', 'H', 'D'. 'MS' = Millisecond, 'S' = Second, 'M' = Minute, 'H' = Hour, 'D' = Day</p> <div style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p><b>Example</b> DATE_CONVERT('MS', 'H', AVG(Incident.OutageEnd,              PERIOD_ENTITY=OutageStartPeriod)              - AVG(Incident.OutageStart, PERIOD_              ENTITY=OutageStartPeriod) )</p> </div>

- **Date constant**

The dates are as follows:

UI Element	Description
<p><b>IN_PERIOD</b></p>	<p><b>Formula:</b> &lt;EntityName&gt;.&lt;FieldName&gt; IN_PERIOD</p> <p>Use in Filter Expressions to specify the condition relative to the start of the calculation period defined for the KPI or Metric . The condition is related to the KPI or Metric time period.</p> <p>If you select <b>Daily</b> for the Calculation Period of a KPI/Metric, and if the KPI/Metric formula contains <b>in_period(-XX)</b>, <b>end_period(-XX)</b>, or <b>Period_entity = Period (-XX)</b>, XX must be less than or equal to <b>365</b>.</p> <div style="background-color: #f0f0f0; padding: 10px;"> <p><b>Example</b></p> <ul style="list-style-type: none"> <li>▪ COUNT(Incident, Incident.CreateTime IN_PERIOD) The incidents that are counted are those that were created during the current time period. If the KPI time frame is 'Weekly', the formula counts only the incidents created per week.</li> <li>▪ COUNT(Defect,Defect.Open_In_Date IN_PERIOD)- COUNT (Defect,Defect.Open_In_Date IN_PERIOD(-12)) Counts the number of defects in the current period and subtracts the number of defects that occurred during the 12 previous periods. For example, in case of 'monthly' periodicity, the formula calculates the number of defects that occurred in 01/13 and subtracts the number of defects that occurred in 01/12.</li> </ul> </div>
<p><b>IN_CURRENT_YEAR</b></p>	<p><b>Formula:</b> &lt;EntityName&gt;.&lt;FieldName&gt; IN_CURRENT_YEAR</p> <p>Use in Filter expressions to specify the condition relative to the current year during the calculation.</p> <div style="background-color: #f0f0f0; padding: 10px;"> <p><b>Example</b> SUM(Period.PeriodNumber , Period.Year IN_CURRENT_YEAR) In recalculation of the KPI a couple of years back, the Period.Year is replaced with the year for which the calculation is performed at each given time. The value of the field Period.Year should be String and should fit the pattern: FYxxxx.&lt;br&gt;For example: FY2011 or FY2009.</p> </div>

UI Element	Description
<p><b>END_PERIOD</b></p>	<p><b>Formula:</b> &lt;EntityName&gt;.&lt;FieldName&gt; conditional operator END_PERIOD</p> <p>Use in Filter expressions to specify the condition relative to the end of the calculation period defined for the KPI or Metric . The condition is related to the time period.</p> <p>If you select <b>Daily</b> for the Calculation Period of a KPI/Metric, and if the KPI/Metric formula contains <b>in_period(-XX)</b>, <b>end_period(-XX)</b>, or <b>Period_entity = Period (-XX)</b>, XX must be less than or equal to <b>365</b>.</p> <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p><b>Examples</b></p> <ul style="list-style-type: none"> <li>■ COUNT(Incident, Incident.CreateTime &lt;= END_PERIOD) The incidents that are counted are those that were created before the current time period ended. If the KPI time frame is 'Weekly', the formula counts only the incidents created up to the end of that week</li> <li>■ COUNT(Defect,Defect.Open_In_Date END_PERIOD)- COUNT (Defect,Defect.Open_In_Date END_PERIOD(-12)) Counts the number of defects created till the completion of the current period and subtracts the number of defects that occurred in the past 12 periods. For example, in case of 'monthly' periodicity, the formula counts the defects that occurred from the beginning of the calculation period up to 01/13 and subtracts the number of defects that occurred from the beginning of the calculation period up to the 12 months before 01/13.</li> </ul> </div>

UI Element	Description
<b>PERIOD_ENTITY</b>	<p><b>Formula:</b> PERIOD_ENTITY=Period</p> <p>Use in Filter expressions to specify the entity that represents the PERIOD table that calculation are based on.</p> <p>Some of the Universes are built as Data Warehouses, which means that they already store aggregated values per period. You can specify in this field, the entity in the Universe that corresponds to the Period you want to use. The content of that entity determines the entries that are filtered for the calculation.</p> <p>If you select <b>Daily</b> for the Calculation Period of a KPI/Metric, and if the KPI/Metric formula contains <b>in_period(-XX)</b>, <b>end_period(-XX)</b>, or <b>Period_entity = Period (-XX)</b>, XX must be less than or equal to <b>365</b>.</p> <div data-bbox="532 814 1369 1052" style="background-color: #f0f0f0; padding: 10px;"> <p><b>Examples</b></p> <ul style="list-style-type: none"> <li>▪ COUNT(Incident, PERIOD_ENTITY = CreateTimePeriod)</li> <li>▪ COUNT(SLStatus,PERIOD_ENTITY = Period(-12)) In this case the period is shifted 12 periods back. 01/13 is shifted to 01/12.</li> </ul> </div>
<b>KPI_PERIODICITY_TYPE</b>	<p><b>Formula:</b> KPI_PERIODICITY_TYPE=Period</p> <p>A constant that is replaced by the specific KPI or Metric Calculation Period that is to be used for the calculation. For details, see "<a href="#">KPI or Metric Configuration and Calculation Details</a>" on page 90.</p> <div data-bbox="532 1272 1369 1388" style="background-color: #f0f0f0; padding: 10px;"> <p><b>Example</b> COUNT(Incident, CreateTimePeriod.Periodicity = KPI_PERIODICITY_TYPE)</p> </div>
<b>NOW</b>	<p>A constant that is replaced by the current calculation date during the calculation.</p> <div data-bbox="532 1507 1369 1623" style="background-color: #f0f0f0; padding: 10px;"> <p><b>Example</b> COUNT(Incident, NOW - Incident.CreateTime &gt; 5*DAY)</p> </div>

UI Element	Description
<b>HOUR</b>	<p>A constant that represents one hour.</p> <p><b>Example</b> COUNT(Incident, NOW - Incident.CreateTime &gt; 5*HOUR)</p>
<b>DAY</b>	<p>A constant that represents one day.</p> <p><b>Example</b> COUNT(Incident, NOW - Incident.CreateTime &gt; 5*DAY)</p>
<b>WEEK</b>	<p>A constant that represents one week.</p> <p><b>Example</b> COUNT(Incident, NOW - Incident.CreateTime &gt; 5*WEEK)</p>

### Variables

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

UI Element	Description
<b>Variables</b>	<p>The list of variables you can use in the KPI or Metric formula.</p> <p>The list displays the entities and fields of the Universe that corresponds to the Business context you selected in the Calculation details tab for the KPI or Metric .</p> <p><b>Note:</b> When a list of specific values has been assigned to a variable in SAP BusinessObjects Enterprise, and the auto-complete feature is enabled for the variable, then when you select the variable and one of the conditional operators in the formula or filter, the list of values assigned to the variable is displayed. You can then select one of the values, or you can enter free text. The maximum number of displayed values is a configured parameter and is limited, for example, to 50 or 100.</p>
<b>&lt;Search&gt;</b>	Enter a string to filter for the entities and fields whose name includes the string.
<b>Add</b>	<ul style="list-style-type: none"> <li>Click the <b>Add</b> button under the Functions box to add the selected function to the formula box at the end of the current expression.</li> <li>Click the <b>Add</b> button under the Variables box to add the selected variable to the formula box at the end of the current expression.</li> </ul>



### Description



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

UI Element	Description
<b>Description</b>	A description of the function you have selected in the Functions area or a description of the variable you have selected in the Variables area.

### <Formula>

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

UI Element	Description
	Use these buttons to enter the relevant regular operations into the formula.
	Use these buttons to enter the relevant conditional operators into the formula. The conditional operators are: <ul style="list-style-type: none"> <li>• = (equal)  <b>Syntax:</b> op1 = op2</li> <li>• &gt; (greater than)  <b>Syntax:</b> op1 &gt; op2</li> <li>• &lt; (smaller than)  <b>Syntax:</b> op1 &lt; op2</li> <li>• &gt;= (greater than or equal to)  <b>Syntax:</b> op1 &gt;= op2</li> <li>• &lt;= (smaller than or equal to)  <b>Syntax:</b> op1 &lt;= op2</li> <li>• &lt;&gt; (not equal)  <b>Syntax:</b> op1 &lt;&gt; op2</li> </ul>

UI Element	Description
	<p>Use these buttons to enter the relevant logical operators into the formula. The logical operators are:</p> <ul style="list-style-type: none"> <li> <b>like Syntax:</b> operand like char %                      Matches a specific pattern. % is a wildcard character meaning `match any characters'. Applicable on string type operand.                 </li> <li> <b>AND.</b> Logical AND.  <b>Syntax:</b> (expr1) AND (expr2)                 </li> <li> <b>OR.</b> Logical OR.  <b>Syntax:</b> (expr1) OR(expr2)                 </li> <li> <b>NOT.</b> Returns the opposite of a boolean expression.  <b>Syntax:</b> NOT (expr)                 </li> </ul>
	<p>Use these buttons to enter the corresponding elements into the formula.</p>
<p><b>&lt;Formula box&gt;</b></p>	<p>The formula appears as you are building it using the variables, functions and buttons.</p>
<p><b>Test</b></p>	<p>Click to validate and test the formula and the filter.</p> <p>The system first performs the validation of both the formula and the filter together. It then tests the KPI or Metric and displays the result.</p>
<p><b>OK/Cancel</b></p>	<p>Click:</p> <ul style="list-style-type: none"> <li> <b>OK</b> to transfer the selected formula to the <b>Formula</b> box of the Calculation details tab.                 </li> <li> <b>Cancel</b> to cancel the changes.                 </li> </ul> <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p><b>Note:</b> In the Calculation details tab, the <b>Save</b> and <b>Discard</b> buttons become enabled and you can click <b>Save</b> to save the changes.</p> </div>



# KPI or Metric Filter

You can restrict the range of a KPI or Metric formula by selecting, in the filter, specific values for the variables used in the formula.

In addition, you can customize a KPI or Metric formula. For details, see "[KPI or Metric Formula](#)" on [page 104](#).

## To access:

Click the **Open Filter Builder** button in the Calculation Details tab in the Properties pane of a KPI or Metric .

**Section navigation:** ● "[Learn More](#)" below ● "[Tasks](#)" on [page 133](#) ● "[UI Description](#)" on [page 135](#)

## Learn More

### Case-sensitivity and Other Information

- The KPI or Metric Filter language is not case-sensitive except for the values of the fields.
- Filters include single quotes only for string primitives (characters between double-quotes, and dates).
- Field values are case-sensitive.

You can use additional variables and entities by creating Contexts using Context Designer. For details, see "[Create and Manage Contexts Using Context Designer](#)" in the *IT Executive Scorecard Administrator Guide*.

### Formulas, Filters, Thresholds, Values, Trend, and Score

This section describes the information related to a KPI or Metric:

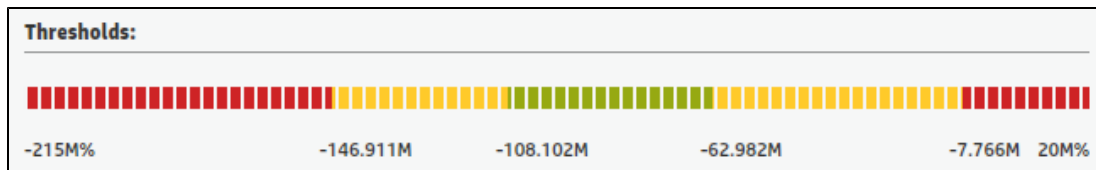
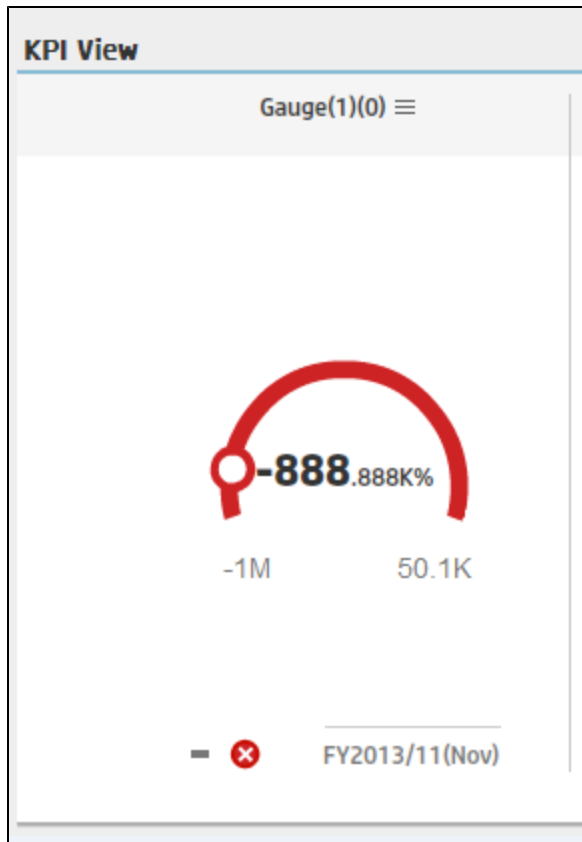
#### KPI Formula, Filter, and Value

The Scorecard KPI engine calculates the **value** of the KPI using the **formula** specified for the KPI and provides the KPI's **status** and **score** using the thresholds specified for the KPI. You can also build KPI filters to restrict the range of the formula by selecting specific values for the variables used in the formula.

#### Decimal Precision

The decimal precision used in displays in Executive Scorecard is as follows:

- **Studio/Dashboard/Explorer Active Tree/Thresholds in Explorer.** The values of KPIs and Metrics are displayed with a maximum of 6 digits and if needed a decimal point. Digits after the decimal point are rounded to 3 digits maximum. Digits before the decimal point are rounded to 3 digits maximum and K, M, or T are used to indicate the correct value. For example: 456.7893 is rounded to 456.789, 3300122.111 is displayed as 3.300 M, or 999999 is displayed as 999.999 K



- **Thresholds in Studio.**

Because the threshold fields in the Studio are where you enter the threshold values, the thresholds display all the digits before the decimal point. Nevertheless, if you configure a KPI threshold with more than 3 digits after the decimal point, they are rounded to 3 digits. For example:



**KPI Threshold**

The engine compares the KPI **value** to the KPI **threshold**, and calculates the KPI status.

**KPI Status**

The KPI **status** can be **Error**, **Warning**, or **Good**.

### KPI Trend

The trend shows the tendency of a changing KPI result value relative to the previous result.

The trend is:

- **Up** if the current result is higher than the previous result.
- **Down** if the current result is lower than the previous result.
- **Neutral** if the current and previous results are the same.

### KPI Score

The KPI value is translated into a score using the threshold specified for the KPI.

All the **scores** are normalized to the same scale of measurement (for example from 0 to 10) to enable the calculation of an Objective that is based on the **scores** of KPI's from different types. The **score** reflects the **status** of the business **value** and its relative distance from the **threshold**.

In addition:

- All the parent child rule calculations are based on the scores of their children.
- The KPI score represents how well the KPI is doing compared to the business Objective. For details, see "[Objectives](#)" on page 20.

**Example** A KPI calculates a percentage (%) and its thresholds are Good from 90% and up. When the KPI has a value of 90%-100%, the KPI's status is Good. The score for 85% is higher than the score for 65%, and the score for 97% is higher than the score for 93% even though the status is the same, this enables showing the trend of KPIs and Objectives even if the status remains the same.

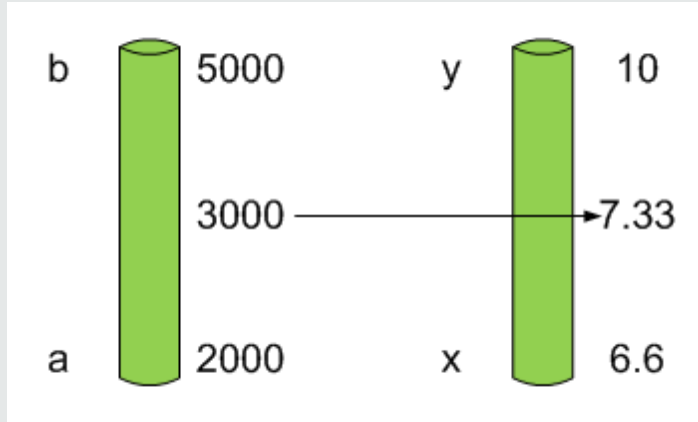
The normalization process is based on the user-defined threshold for a metric. KPI thresholds have 3 sectors: good (6.6 - 10), warning (3.3 - 6.6), and error score ranges (0 - 3.3).

The Score calculation process is as follows:

1. Get the KPI result.
2. Get the status range as configured by the thresholds in the KPI definition.
3. Calculate the score as follows:  
$$F(n) = ((n - a) / (b - a)) * (y - x) + x$$
where:
  - a – minimal value of the threshold range
  - b – maximal value of the threshold range
  - x – minimal value of according score range

- y – maximal value of according score range
- n – result value

**Example** If a=2000 and b=5000, the Score value is 7.33



**Example** The threshold of a metric similar to MTTR (time to fix a problem) is 1 day for good status, and 7 days for warning status. The score scale is constant: 8-10 is good status, 7-8 is the warning status and 0-7 is error status.

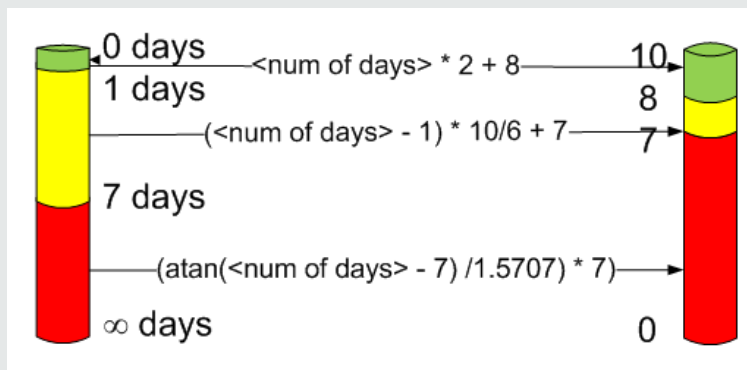
Any value on the MTTR scale needs to be transformed into the score scale by linear or exponential transform. Since the lower threshold is not set (it is equal to  $\infty$ ), the formula is different:

Lets check the Score based on the following Results :

$$0.5 \text{ day} \rightarrow F(1) = ((0.5 - 0) / (1 - 0)) * (10 - 8) + 8 = 9 \text{ (the score is 9)}$$

$$4 \text{ days} \rightarrow F(4) = ((4 - 1) / (7 - 1)) * (8 - 7) + 7 = 7.5 \text{ (the score is 7.5)}$$

$$10 \text{ days} \rightarrow F(10) = (\text{atan}(10 - 7) / 1.5707) * (7 - 0) = 4.43 \text{ (the score is 4.43)}$$



## Metric Formula and Value

The Scorecard KPI engine calculates the **value** of the Metric using the **formula** specified for the Metric. You can also build metric filters to restrict the range of the formula by selecting specific values for the variables used in the formula.

## Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab

Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158](#).

# Tasks

This section includes the following tasks:

["Modify a KPI or Metric filter" below](#)

["Test Changes Made to a KPI or Metric Configuration" below](#)

### Modify a KPI or Metric filter

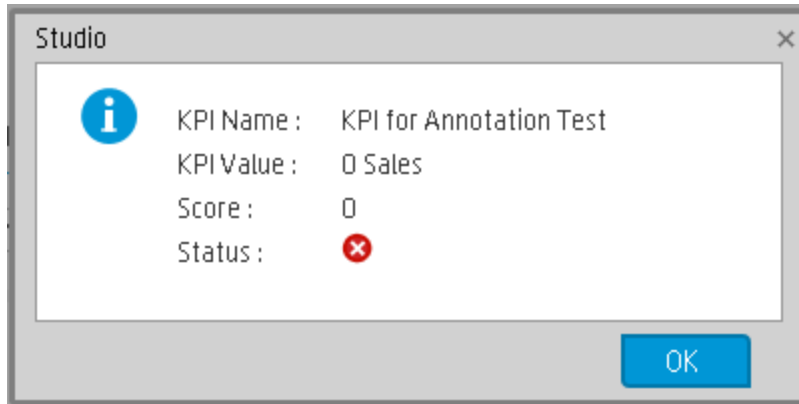
1. In the Active KPIs pane, select the relevant KPI or Metric. The Configuration Details and Calculation Details tabs are displayed.
2. Click the **Calculations details** tab.
3. You can, in the Filter area:
  - a. Use the Filter Builder to help you create the relevant filter; click the **Open Filter Builder** button to open the Filter Builder dialog box.
  - b. Enter the new filter or modify the existing filter directly in the Filter area.
4. Click the **Validate** button to validate the filter.
5. Click **Save** to save the change.

### Test Changes Made to a KPI or Metric Configuration

When you change a KPI's formula or thresholds, you must test that the changes are valid.

1. After you have changed the configuration of a KPI in the Calculation details tab or in the Configuration details tab, click **Save** to save your changes. The **Test KPI** button is enabled.
2. Click the **Test KPI** button to test the changes you made to the KPI configuration. The KPI value is calculated and displayed in a popup window. The window displays the new value,

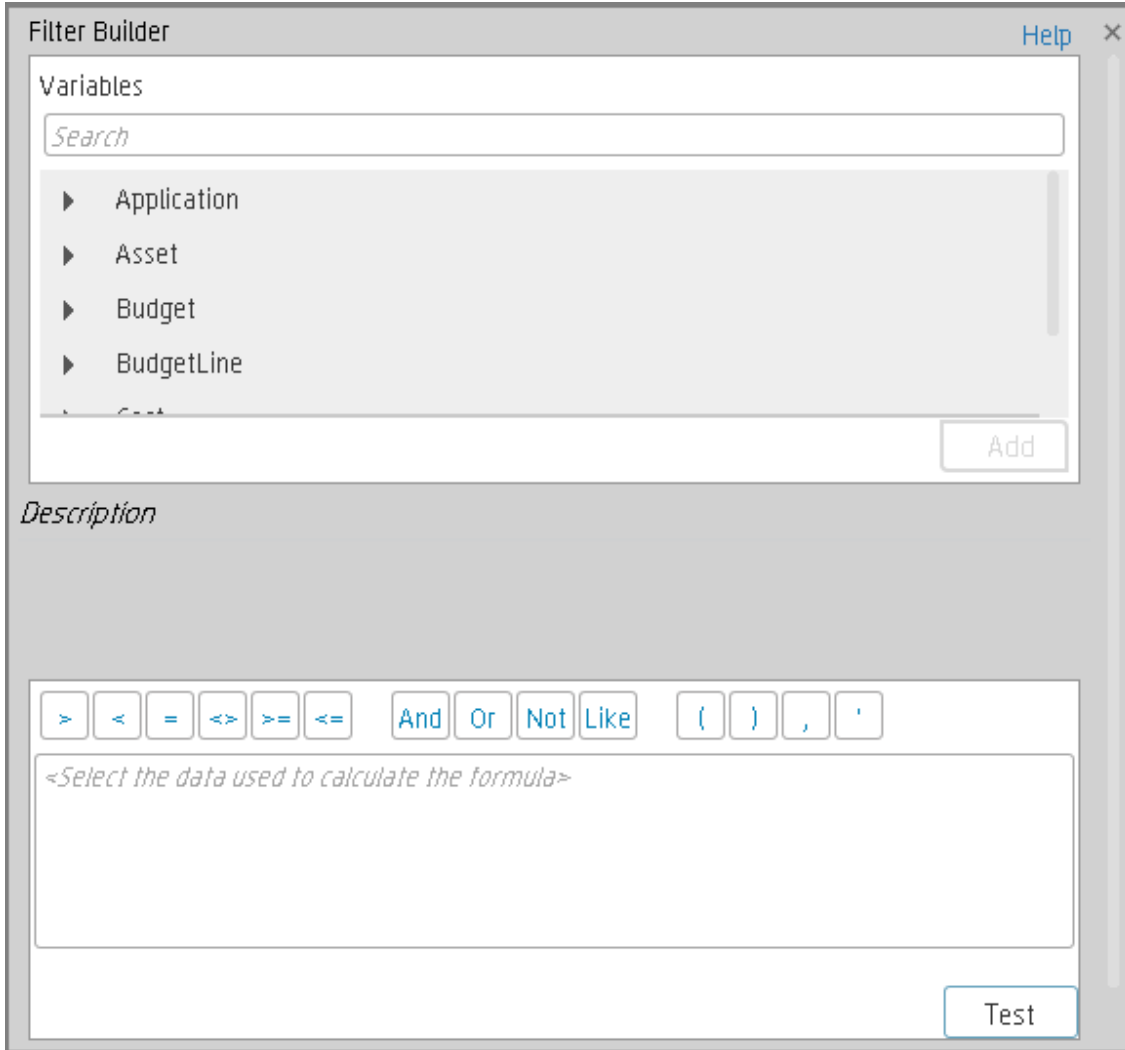
score, and status of the modified KPI. The result is not saved to the database.




3. Click **OK** to return to the Configuration details or Calculation details tab.

## UI Description



### Filter Builder Dialog Box



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

UI Element	Description
<p><b>Variables</b></p>	<p>The list of variables you can use in the KPI or Metric filter.</p> <p>The list displays the entities and fields in the Universe that corresponds to the Business context you selected in the Calculation details tab for the KPI or Metric .</p> <div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;"> <p><b>Note:</b> When a list of specific values has been assigned to a variable in SAP BusinessObjects Enterprise, and the auto-complete feature is enabled for the variable, then when you select the variable and one of the conditional operators in the formula or filter, the list of values assigned to the variable is displayed. You can then select one of the values, or you can enter free text. The maximum number of displayed values is a configured parameter and is limited, for example, to 50 or 100.</p> </div>
<p>&lt;Search&gt;</p>	<p>Enter a string to filter for the entities and fields whose name includes the string.</p>
<p><b>Description</b></p>	<p>A description of the variable you have selected in the Variables area.</p>
	<p>Use these buttons to enter the corresponding conditional operators in the filter. The condition operators are:</p> <ul style="list-style-type: none"> <li>• = (equal) <b>Syntax:</b> op1 = op2</li> <li>• &gt; (greater than) <b>Syntax:</b> op1 &gt; op2</li> <li>• &lt; (smaller than) <b>Syntax:</b> op1 &lt; op2</li> <li>• &gt;= (greater than or equal to) <b>Syntax:</b> op1 &gt;= op2</li> <li>• &lt;= (smaller than or equal to) <b>Syntax:</b> op1 &lt;= op2</li> <li>• &lt;&gt; (not equal) <b>Syntax:</b> op1 &lt;&gt; op2</li> </ul>



UI Element	Description
	<p>Use these buttons to enter the corresponding logical operators into the filter. The logical operators are:</p> <ul style="list-style-type: none"> <li> <b>like Syntax:</b> operand like char%                      Matches a specific pattern. % is a wildcard character meaning `match any characters'. It is applicable on string type operand.                 </li> <li> <b>AND. Syntax:</b> (expr1) AND (expr2)                      Logical AND                 </li> <li> <b>OR. Syntax:</b> (expr1) OR(expr2)                      Logical OR                 </li> <li> <b>NOT. Syntax:</b> NOT (expr)                      Returns the opposite of a boolean expression.                 </li> </ul>
	<p>Use these buttons to enter the corresponding elements into the filters.</p>
<p>&lt;Filter box&gt;</p>	<p>The filter appears as you are building it using the variables, functions and buttons.</p>
<p><b>Test</b></p>	<p>Click to validate and test the formula and the filter.</p> <p>The system first performs the validation of both the formula and the filter together. It then tests the KPI or Metric and displays the result.</p>
<p><b>OK/Cancel</b></p>	<p>Click:</p> <ul style="list-style-type: none"> <li> <b>OK</b> to transfer the selected formula to the <b>Filter</b> box of the Calculation details tab.                     </li> </ul> <div style="background-color: #f0f0f0; padding: 10px; margin: 10px 0;"> <p><b>Note:</b> In the Calculation details tab, the <b>Save</b> and <b>Discard</b> buttons become enabled and you can click <b>Save</b> to save the changes.</p> </div> <ul style="list-style-type: none"> <li> <b>Cancel</b> to cancel the changes.                     </li> </ul>

# KPI or a Metric Business Context

A KPI or Metric business context or universe represents a global business facet related to the aspect of business the KPI or Metric represents.

**Example** The % of Assets in Maintenance KPI represents one aspect of the AssetManagement universe.

You can change the business context of a KPI or Metric when you clone the KPI or Metric , or change its formula.

You can also add a business context and attach KPIs or Metric to the new business context. For details, see "[Add a Business Context to the Studio](#)".

## To access:

Click **Select business context** in the Calculation details tab for a selected active KPI or for a KPI template.

**Section navigation:** ● "[Learn More](#)" below ● "[Tasks](#)" on page 140 ● "[UI Description](#)" on page 142

## Learn More

### Business Contexts

A semantic layer is a business representation of corporate data that helps end-users access data autonomously using common business terms. It maps complex data into familiar business terms such as product, customer, or revenue to offer a unified, consolidated view of data across the organization. By using common business terms, rather than data language, to access, manipulate, and organize information, it simplifies the complexity of business data. These business terms are stored as objects in a Business Context (or universe), accessed through business views. Business Contexts enable business users to access and analyze data stored in a relational database and OLAP cubes. This is claimed to be core business intelligence (BI) technology that frees users from IT while ensuring correct results.

Business Views is a multi-tier system that is designed to enable companies to build comprehensive and specific business objects that help report designers and end users access the information they require. Business Views is intended to enable people to add the necessary business context to their data islands and link them into a single organized Business View for their organization.

A Context or universe is a business representation of an organization's data that helps end-users access data using common business terms. A Context is the result of a semantic layer of metadata that creates a business oriented view of the data. A Context contains a schema of the tables that make up the dimension and measurement objects. A Context is an interface between the data warehouse and the analytics that display the data.

Context are made up of objects and classes that are mapped to the source data and are accessed through queries and reports. They correspond to the business contexts used in HP IT Executive Scorecard.

Each Context includes classes (entities), objects with a dimension attribute, and relationships between the entities. The entity's values are used in the calculation of values and statuses of the Key Performance Indicators (KPIs) or Metrics that represent them. The KPIs or Metrics are the building blocks used by the HP IT Executive Scorecard engine and the Studio.

Executive Scorecard Semantic Layer may include:

- Universes created in SAP BusinessObjects. For more details on universes, see the relevant SAP BusinessObjects documentation.
- Out-of-the-box Contexts created using the Context Designer.
- User-defined Contexts created using Context Designer and populated with data uploaded from .CSV files using Context Designer. For details on the Context Designer, see [Create and Manage Contexts Using Context Designer and Upload Data Using Data Loader](#).

If you want to change the formula of a KPI or Metric, you must be aware of the relationships in the context (universe) of the KPI or Metric. For details, see the [KPI and Metric Library in Excel format](#) or in the relevant:

- [ALM Data Source - Integration, Associated Contexts, KPIs, Metrics, Data Lineage, and Reports](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Application Lifecycle Management*
- [AM Data Source - Integration, Associated Contexts, KPIs, Metrics, Data Lineage, and Reports](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Asset Manager*
- [AWS Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of Amazon Web Services*
- [AWSCW Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of Amazon Web Service CloudWatch*
- [BSM Data Source - Integration, Associated Contexts, KPIs, Metrics, Data Lineage, and Reports](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Business Service Management*
- [CSA Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Cloud Service Automation*
- [DP Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Data Protector*
- [Hyper-V Data Source](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of Hyper-V*

- [IC Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Insight Control*
- [NA Data Source - Associated Contexts, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Network Automation*
- [NNM Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Network Automation*
- [OO Data Source - Integration, Associated Contexts, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Operation Orchestration*
- [PPM Data Source - Integration, Associated Contexts, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Project and Portfolio Management*
- [SA Data Source - Associated Contexts, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Server Automation*
- [SE Data Source - Integration, Associated Contexts, KPIs, Metrics and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Storage Essentials*
- [SM Data Source - Associated Contexts, KPIs, Metrics, Data Lineage, and Reports](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Service Manager*
- [UCMDB Data Source - Integration and Associated Context](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of HP Universal Configuration Management Database*
- [VCM Data Source - Integration, Associated Context, KPIs, Metrics, and Data Lineage](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of vCenter Chargeback Manager*
- [Alternate Source Integration](#) in the *IT Executive Scorecard Content Reference Guide for the Integration of Alternate Data Sources*

The contexts, entities, and dimensions that are displayed and used in the Studio are part of the universes that are located in the **XS\_Studio** library.

### **Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab**

Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab"](#) on page 158.


## **Tasks**

This section includes:

["Change the business context of a KPI" on the next page](#)

["Test changes made to a KPI configuration"](#) below

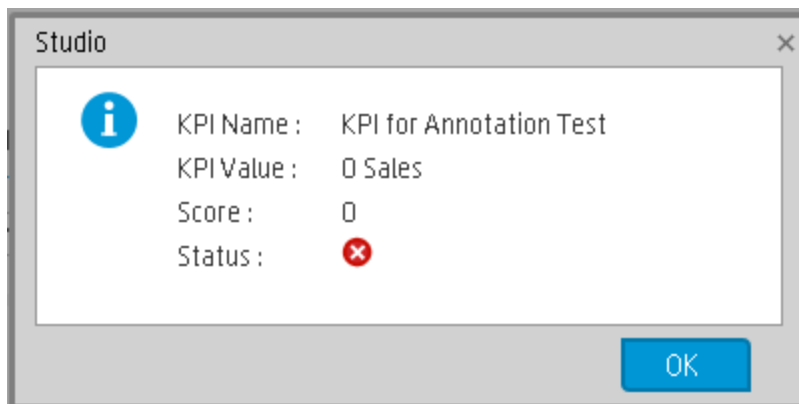
## Change the business context of a KPI

1. Select the relevant KPI in the Active KPIs pane.
2. Optionally, clone the KPI by clicking the **Create a copy of the current entity**  button. A KPI with the same name followed by an index number between parenthesis is created in the same Objective.
3. In the Calculation details tab for the KPI, click **Select business context**.
4. In the Business Context dialog box, select the new business context, in the **Select the business context** link. Click **OK**.
5. If necessary, modify the formula and/or the filter. For details, see ["KPI or Metric Formula" on page 104](#) or ["KPI or Metric Filter" on page 129](#).

## Test changes made to a KPI configuration

When you change a KPI's universe (business context), you must test that the changes are valid.

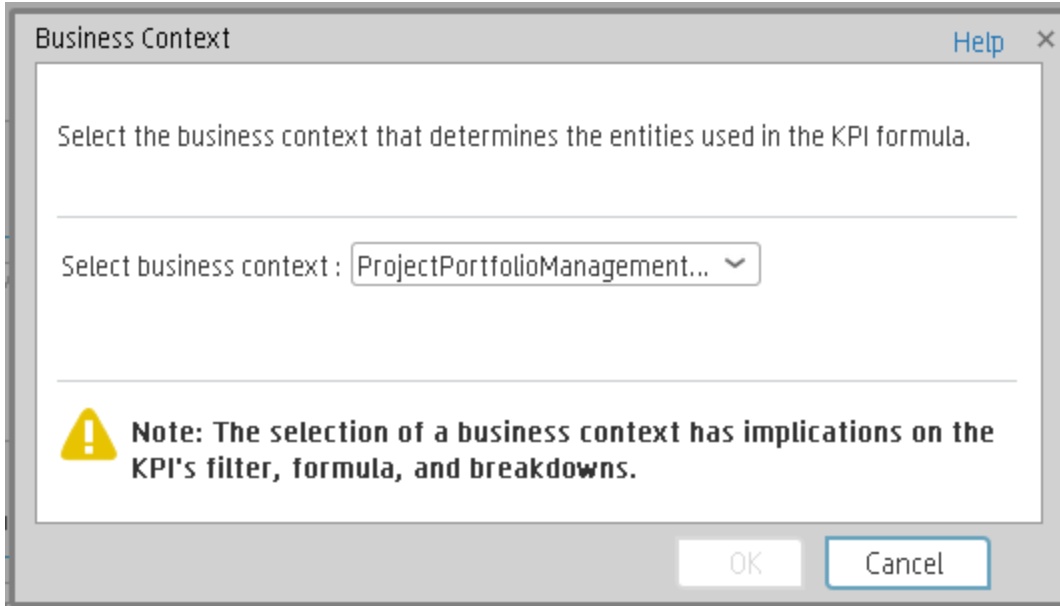
1. After you have changed the configuration of a KPI in the Calculation details tab or in the Configuration details tab, click **Save** to save your changes. The **Test KPI** button is enabled.
2. Click the **Test KPI** button to test the changes you made to the KPI configuration. The KPI value is calculated and displayed in a popup window. The window displays the new value, score, and status of the modified KPI. The result is not saved to the database.



3. Click **OK** to return to the Configuration details or Calculation details tab.

## UI Description

### Select Business Context Dialog Box





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

UI Element	Description
<b>Select business context</b>	Select the relevant business context. The business context determines the business entities that are available to be used in the formula used to calculate the value of the KPI.

# Calculation

If you have configured an active KPI and you have modified or configured its formula, filter, or threshold, the value, status, and trend of the KPI, and of the related Objectives, must be recalculated to display the corresponding data, in the Dashboard. You perform the calculation for the current period of each KPI within the selected business context.

## To access:

Select the relevant KPI, click the **Calculation options**  button, and select the  **Calculate now** option, in the Active KPIs pane.

**Section navigation:** ● ["Tasks" below](#) ● ["UI Description" on the next page](#)

## Tasks

### Perform a Calculation After Configuration Change

This task includes the following steps:

- ["Prerequisite" below](#)
- ["Calculate for the current period" below](#)
- ["Results" on the next page](#)



#### 1. Prerequisite

You have created or modified the formula, filter, or threshold definition of a KPI. For details, see ["KPI or Metric Formula" on page 104](#) or ["KPI or Metric Filter" on page 129](#).

#### 2. Calculate for the current period

When you change the definition of a KPI (formula or threshold), the change impacts the KPI's value and impacts the Objectives related to the KPI. You may want to perform the calculation for each KPI in the selected business context for the period specified in the KPI configuration, so the impact of the change is felt immediately in the results displayed in the Dashboard.

To calculate the current data:

- a. In the Active KPIs pane, click the **Calculation options**  button in the Active KPIs toolbar, and select the  **Calculate now** option.
- b. In the Calculate Now dialog box that opens:
  - In **Universe/context for recalculation**, select the relevant context (data source) you want to use for the recalculation.

- Select the **I understand the implications of this process and would like to proceed with the calculation** option to proceed with the calculation.

**Limitations:** You perform the calculation for the current period of each KPI within the selected business context.

- c. Click **Calculate**.
- d. Select the **I understand the implications of this process and would like to proceed with the calculation** option to proceed with the calculation.

The calculation is performed for all KPIs and Objectives with the selected context (universe).

**Note:**

- The calculation deletes the data that was available for the same period as the period selected for the calculation.
- No backup is available.

### 3. Results

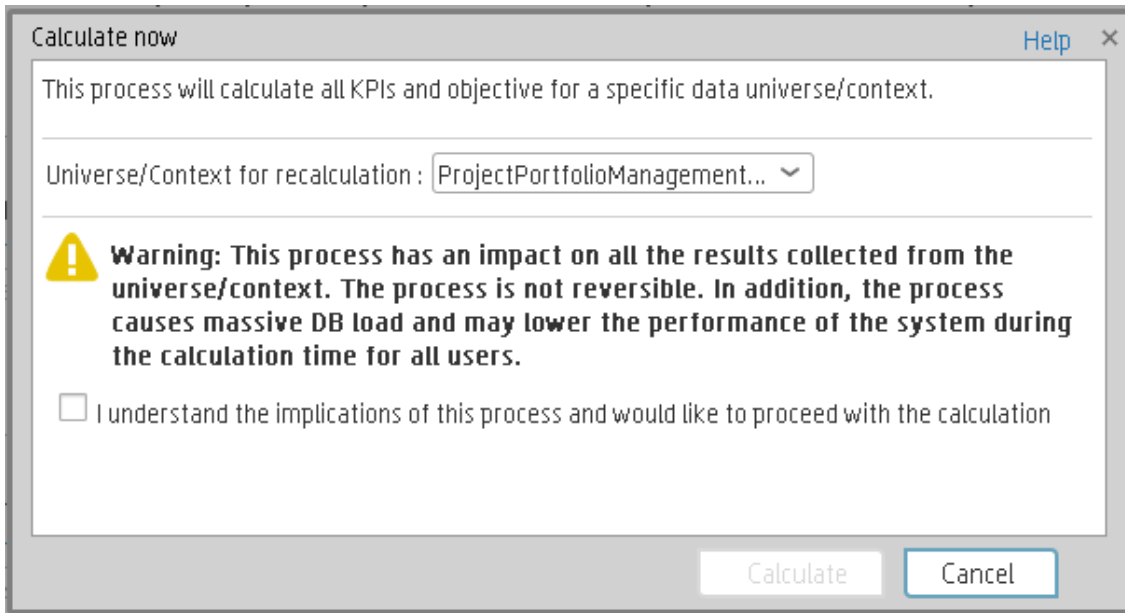
The calculated data is displayed in the relevant components in the Dashboard.

## UI Description

### Calculate Now Dialog Box

This dialog box enables you to calculate all the KPIs, Objectives values, trends, and statuses, for the selected business context and for the time period of each KPI within the same business context.





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

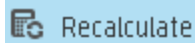
UI Element	Description
<b>Universe/context for recalculation</b>	Select the relevant context (data source) you want to use for the recalculation.
<b>I understand the implications of this process and would like to proceed with the calculation</b>	Select this option to proceed with the calculation.
<b>Calculate</b>	Click to start the calculation.  <b>Limitations:</b> You perform the calculation for the current period of each KPI within the selected business context.

# Recalculation

If you have configured an active KPI and you have modified or configured its formula, filter, or threshold, the value, status, and trend of the KPI, and of the related Objectives, , must be recalculated to display the corresponding data, in the Dashboard. You perform the historical calculation (recalculation) for each KPI within the selected business context from the selected date (up to one year back) till the current date.

## To access:

Select the relevant KPI, click the **Calculation options**  button, and select the



option, in the Active KPI pane.

**Section navigation:** • ["Learn More" below](#) • ["Tasks" below](#) • ["UI Description" on the next page](#)

## Learn More

You can recalculate all results for the selected universe/context from the selected date (up to one year back) till the current date.

## Tasks

### Perform a Recalculation

This task includes the following steps:

- ["Prerequisite" below](#)
- ["Recalculate historical information" below](#)
- ["Results" on the next page](#)


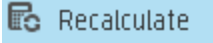
#### 1. Prerequisite

You have created or modified the formula, filter, or threshold definition of a KPI. For details, see ["KPI or Metric Formula" on page 104](#) or ["KPI or Metric Filter" on page 129](#).

#### 2. Recalculate historical information

When you change the definition of a KPI (formula or threshold), the change impacts the KPI's value and impacts the Objectives related to the KPI. You may want to recalculate the historical (past) information related to the KPI.

To recalculate the historical (past) information:

- a. In the Active KPIs pane, select the KPI you have modified.
- b. Click the **Calculation options**  button in the Active KPIs toolbar, and select the  option.
- c. In the Recalculate dialog box that opens, select the relevant context and click **Calculate**.
- d. Select the **I understand the implications of this process and would like to proceed with the calculation** option to proceed with the recalculation.

The historical recalculation is performed for the KPIs configured on the relevant context for the selected context (datasource). You specify the date from which the historical calculation is performed. The calculations are performed for one year back from the selected date up to the current date.

**Note:**

- Recalculations cannot be performed in parallel. To perform a new recalculation you must wait until the current recalculation finishes.
- The recalculation process is CPU-heavy. It should be performed only when necessary.

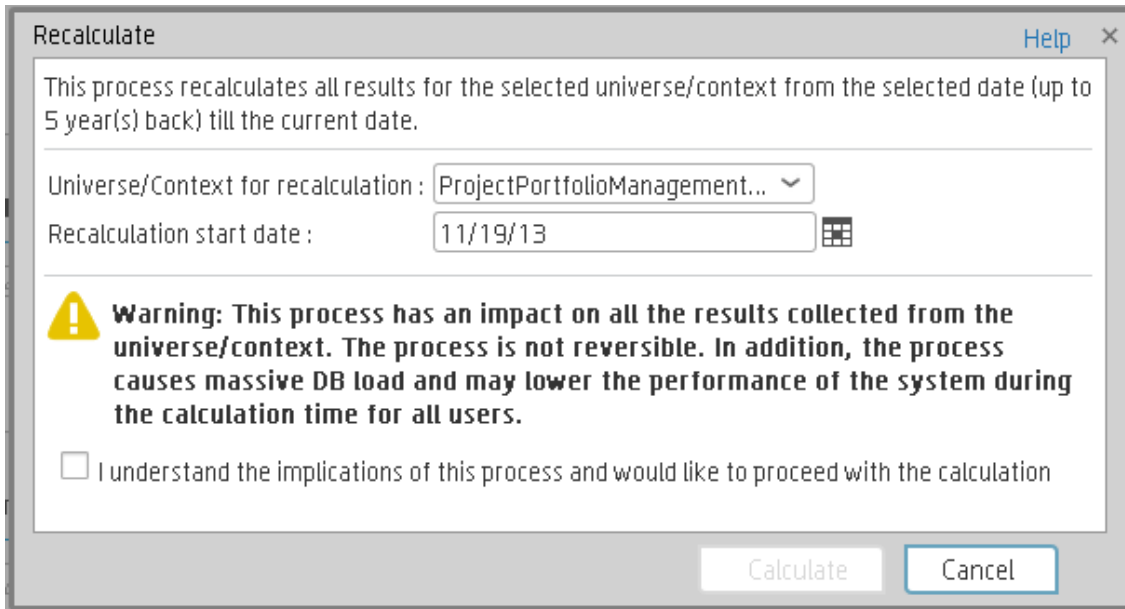
### 3. Results

The recalculated data is displayed in the relevant components in the Dashboard.

## UI Description

### Recalculate Dialog Box

This dialog box enables you to specify how to recalculate all the KPIs, Objectives, values, trends, and statuses, for the context of the KPI whose formula, filter, or threshold you have modified, from the selected date (up to one year back) till the current date.



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

UI Element	Description
<b>Universe/context for recalculation</b>	Select the relevant universe/context for which you want to recalculate all results.
<b>Recalculation start date</b>	<p>Select the date from which to start the historical recalculation. The recalculation is performed for the period starting from the specified date till the current date.</p> <p><b>Limitation:</b></p> <ul style="list-style-type: none"> <li>• The recalculation period is limited to 1 year back from the date you specified in the <b>Recalculation Start Date</b>.</li> <li>• If the KPI or Metric period is Daily, then the recalculation time frame is by default 30 days from the date you specified in the <b>Recalculation Start Date</b>. The default can be modified; for details, see <a href="#">Engine Settings</a> in the <i>IT Executive Scorecard Administrator Guide</i>.</li> </ul>

UI Element	Description
<b>I understand the implications of this process and would like to proceed with the calculation</b>	Select this option to proceed with the recalculation.
<b>Calculate</b>	Click to start the recalculation. <b>Limitations:</b> You perform the calculation for the selected period of each KPI within the selected business context.

# Calculation Scheduling

You can schedule to run the business context calculations periodically. This means that the values, statuses, trends, and scores of the KPIs associated with the business context are calculated and the Scorecards and components in the Dashboard reflect these calculations and results. You can specify how to recalculate all results for the selected universe/context from the selected date (up to one year back) till the current date.

## To access:

Select the relevant KPI, click the **Calculation options**  button, and select the

 **Schedule Context Calculation**

option, in the Active KPI pane.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" below](#) ● ["UI Description" on the next page](#)

## Learn More

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.

## Tasks

### Schedule a business 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.

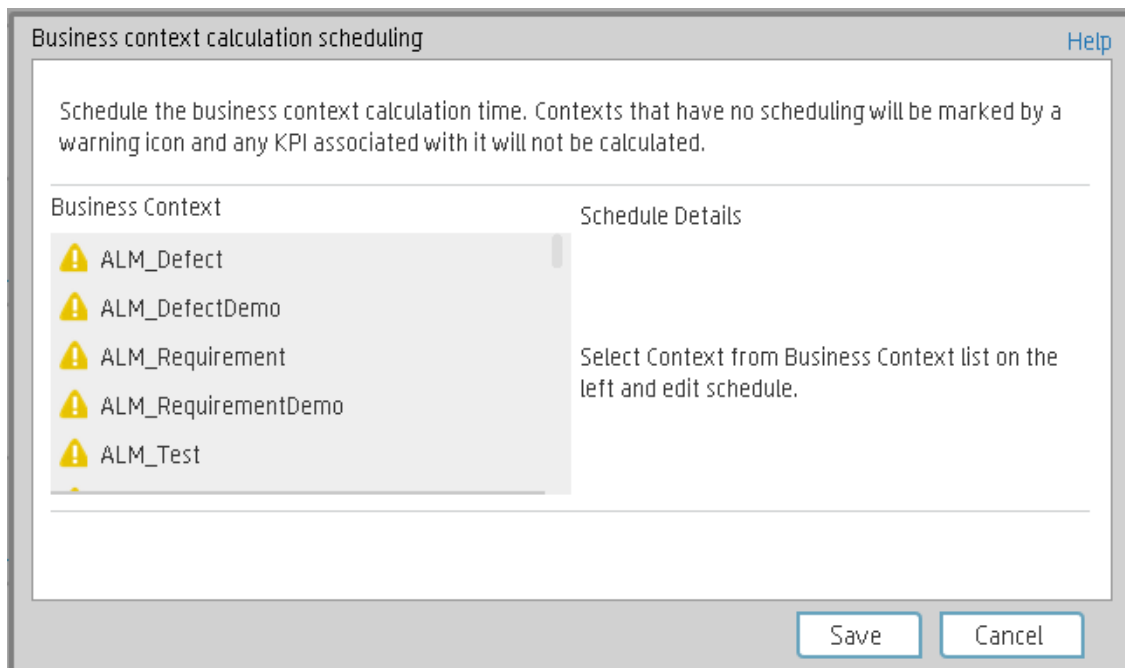
At the scheduled time, the following processes take place:

- 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.


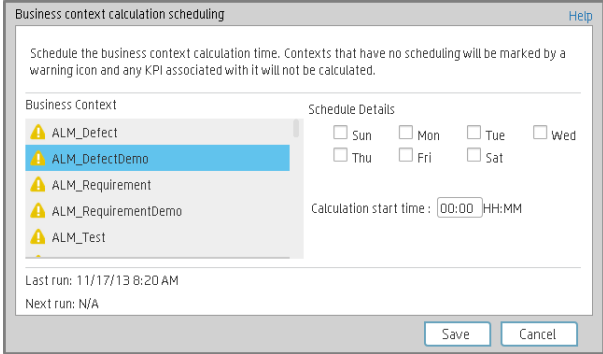
**Movie:** To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see [Movies](#).

## UI Description

### Business Context Calculation Scheduling Dialog Box



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

UI Element	Description
<p><b>Business context</b></p>	<p>In the list of business contexts, select the business context for which you want to schedule the calculations.</p> <p><b>Note:</b> Contexts that have not been assigned a calculation schedule have a  icon. Their KPIs have not been calculated.</p> <p>The Schedule details area is displayed as follows:</p> 
<p><b>Schedule details</b></p>	<p>Select the days of the week when you want to perform the business context calculations.</p>
<p><b>Calculation start time</b></p>	<p>Enter the time when you want to start the business context calculation.</p>
<p><b>Last run</b></p>	<p>The date and time when the last calculation was performed.</p>
<p><b>Next run</b></p>	<p>The date and time when the next calculation is to be performed.</p>



# Calculation and Recalculation Monitoring

If you have configured an active KPI and you have modified or configured its formula, filter, or threshold, you perform a calculation procedure to display the corresponding data, in the Dashboard. You perform the calculation for the current period of each KPI within the selected Business Context. You can also perform a recalculation ( historical calculation) for each KPI within the selected Business Context from the selected date till the current date. You can schedule to run the calculations periodically.

You can monitor the calculation or recalculation history for each Business Context (universe), or you can view the Business Contexts that are currently being calculated or recalculated.

## To access:

In the Active KPI pane, click the **Calculation options**  button, and select the



**Calculation monitoring** option.

**Section navigation:** ● ["Tasks" below](#) ● ["UI Description" on the next page](#)



## Tasks

This section includes:

["Monitor the calculation or recalculation status for a specific Business Context" below](#)



["Monitor the calculations or recalculations that are currently running" below](#)

### Monitor the calculation or recalculation status for a specific Business Context

1. In the Active KPI pane, click the **Calculation options**  button, and select the  **Calculation monitoring** **Calculation monitoring** option.
2. In the Calculation Monitoring Dialog Box, select **Calculation status by Business Context**.
3. Select the relevant Business Context in the **Business Context** drop down list. The list displays all the Business Contexts.

The dialog box displays the status of the calculation or recalculation, the date when the calculation or recalculation started, and the date when the calculation or recalculation ended.

### Monitor the calculations or recalculations that are currently running

1. In the Active KPI pane, click the **Calculation options**  button, and select the  **Calculation monitoring** **Calculation monitoring** option.

2. In the Calculation Monitoring Dialog Box, select **Calculations running now**.

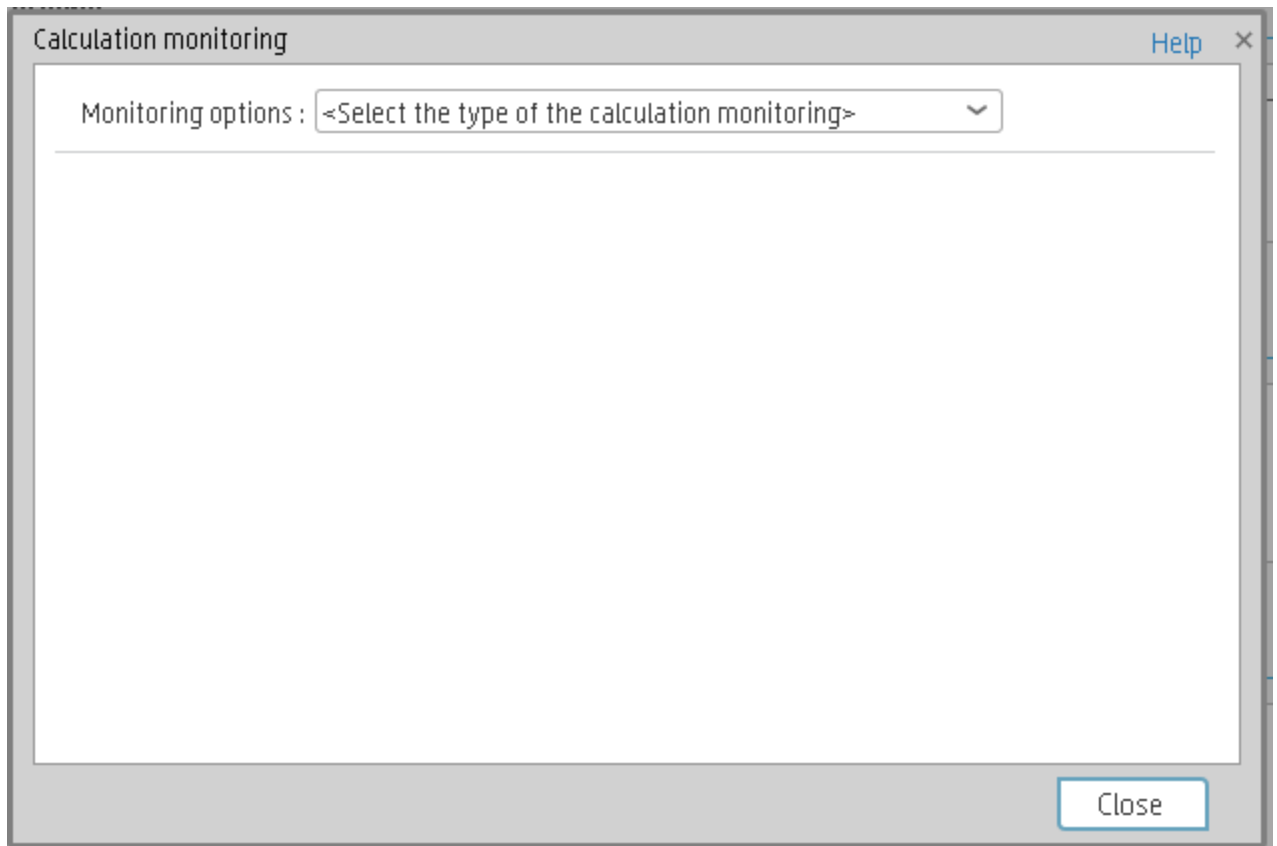
The dialog box displays the Business Contexts for which the calculation or recalculation are currently running.

3. Select the relevant Business Context. The **Current calculation periods** area displays the calculation periods (**Yearly**, **Monthly**, **Quarterly**, **Weekly**, or **Daily**) that are being used currently by the calculation or recalculation process. Click the Business Context to refresh the data about the calculation or recalculation currently running. The Calculation start time field displays the date and time when the calculation or recalculation started.

## UI Description

### Calculation Monitoring Dialog Box

Use the dialog box to monitor the calculation or recalculation history for each Business Context, or to view the Business Contexts that are currently being calculated or recalculated.

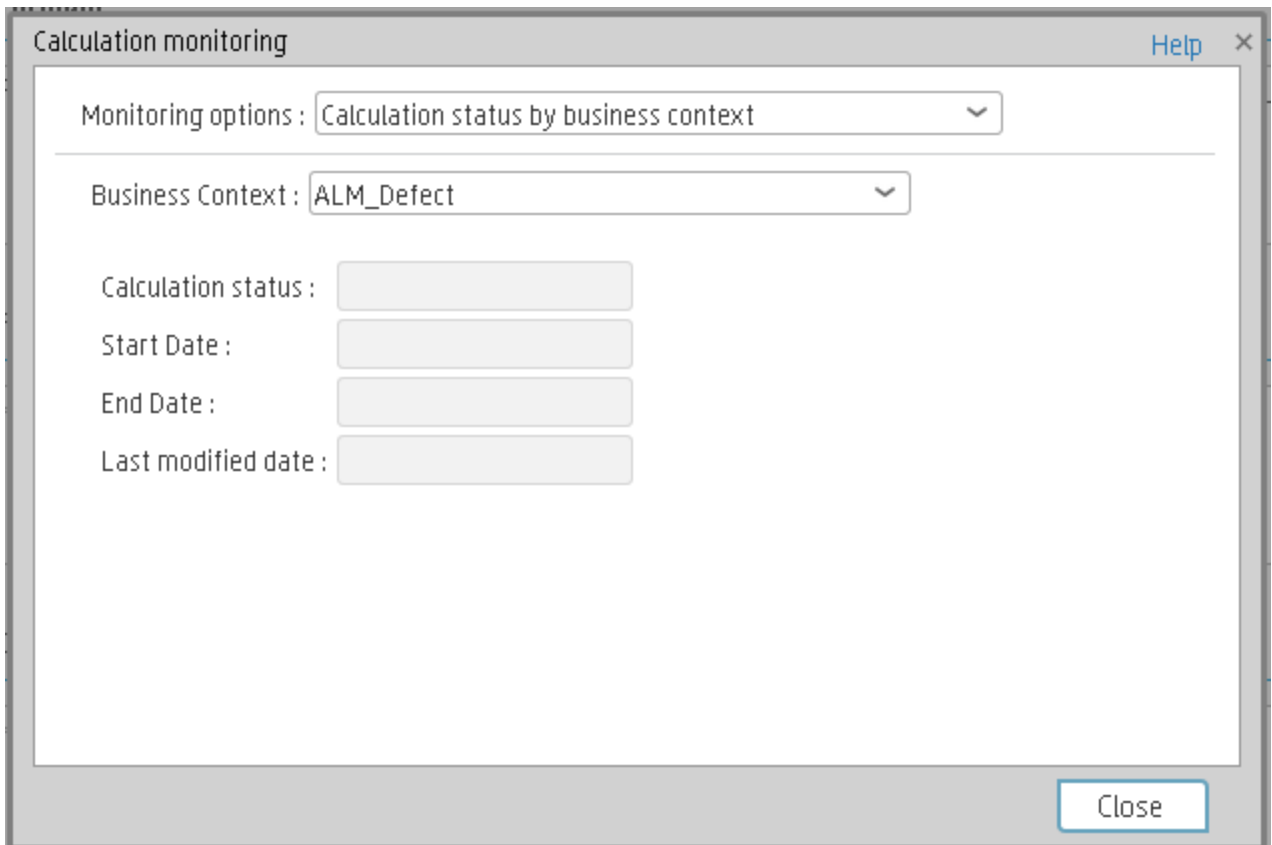


User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets>):

UI Element	Description
------------	-------------

<b>Monitoring options</b>	Select: <ul style="list-style-type: none"> <li>• <b>Calculation status by Business Context.</b> To monitor the calculation or recalculation history of the selected Business Context. For details, see "<a href="#">Calculation status by Business Context</a>" below.</li> <li>• <b>Calculations running now.</b> To view the Business Contexts that are currently being calculated or recalculated. For details, see "<a href="#">Calculations currently running</a>" on the next page.</li> </ul>
<b>Business Context</b>	Select the Business Context you want to monitor in the drop down list. The list displays all the Business Contexts.

**<Calculation status by Business Context>**



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

<b>UI Element</b>	<b>Description</b>
<b>Business Context</b>	Select the relevant Business Context in the drop down list. The list displays all the Business Contexts.

<b>Status</b>	The status of the calculation or recalculation. It can be: <b>Running Now, Not Calculated, Error, or Finished.</b>
<b>Start Date</b>	The date and time when the calculation or recalculation started.
<b>End Date</b>	The date and time when the calculation or recalculation ended. When the calculation or recalculation is still running, the field is empty.
<b>Last modified date</b>	The date and time when the last calculation was completed. If the calculation has completed the End Date and the Last modified date should be the same. If the calculation is still running, the database is updated all the time with the new calculation results and new periods that are currently calculated, and each time the database is updated with some new records related to the calculation, the last modified date will change. This information is useful for historical recalculations that may take a long time to run.

<Calculations currently running>

Calculation monitoring Help ×

Monitoring options :

---

Select business context to view calculation details

Business Context Current calculation periods:

No items to show.

Yearly :

Monthly :

Quarterly :

Weekly :

Daily :

Calculation start time :

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

<b>UI Element</b>	<b>Description</b>
<b>Business Context</b>	The list of the Business Contexts for which a calculation or recalculation is currently running. Click the relevant universe to display the calculation or recalculation details.
<b>Current calculation periods</b>	This area displays the calculation periods ( <b>Yearly, Monthly, Quarterly, Weekly, or Daily</b> ) that are being used currently by the calculation or recalculation process. The numbers in the boxes change when the period changes and you click the Business Context.  <b>Calculation start time.</b> The date and time when the calculation or recalculation started.

# Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab

When you make a change in the Active KPIs pane in the Studio, the changes immediately affect the Dashboard and the Explorer. The effect depends on the type of change performed in the Studio as follows:

- The following changes need a calculation to be performed for the modified KPI, Metric, or Objective to display data in the Explorer tab or the Dashboard tab, so the modified KPI, Metric, or Objective value is **Pending** in these tabs until the calculation is completed:
  - Changing the context, formula, filter, threshold, threshold direction, marginal status (Warning), and calculation period of a KPI.
  - Changing the context, formula, filter, and calculation period of a Metric.
  - Modifying an Objective:
    - Assigning (or un-assigning) KPIs.
    - Changing its rules (Best Child, Worst Child, and more) and the weights for the assigned sub-Objectives or KPIs.
- The following changes are considered minor changes, don't involve calculation, and are immediately displayed in the Dashboard and the Explorer:
  - Scorecard, Perspective, Objective, KPI, Metric, or KPI or Metric Breakdowns name and description change.
  - Changes to Cascading Scorecards.
  - Changes the Business Motivation, Comments, Owner, Additional Info, or Unit.

# Enrich the Dashboard Contents in the Studio

You can enrich the Executive Dashboard contents by:

- Creating cascading Scorecards that enable the Executive to drilldown to lower levels of the same Scorecard. For details, see "[Cascading Scorecards](#)" on page 180.
- Creating breakdowns of KPIs or Metrics to obtain more detailed information about the KPI or Metric measurements. For details, see "[KPI Breakdowns](#)" on the next page or "[Metric Breakdowns](#)" on page 167
- Specify owners and thresholds for specific dimension's values of Breakdown KPIs so only some users can view some of the breakdowns and some users may have different thresholds for the KPI Breakdowns. For details, see "[KPI and Metric Breakdown Overrides](#)" on page 172.
- Provide additional information for a KPI, such as links to other pages, BO or Xcelsius reports, or external URLs. For details, see "[KPI or Objective Additional Information](#)" on page 177.
- Adding Cascading Scorecards to track performance measurement in a top-down approach based on Scorecard objective ownership. For details, see "[Cascading Scorecards](#)" on page 180.

# KPI Breakdowns

You can create and manage Breakdowns for a KPI according to the KPI dimensions.

## To access:

Select a KPI Breakdown in the Active KPIs pane.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on the next page](#) ● ["UI Description" on page 163](#)

## Learn More

### About KPI Breakdowns

A KPI represents a business context (universe). The value of the KPI is calculated based on the entities (facts or dimensions) that provide information on the business context. A business context can include lots of facts or dimensions.

#### Example

- The Attrition Rate KPI for the whole company is composed of the attrition rates for each organization in the company, and those are composed of the attrition rates of each group in the organization. The Attrition rate KPI is calculated using the number of employees in the company and the number of employees who have left the company to pursue other interests or who have retired.
- A ticket that includes information about the department, the subject, the location of the problem, and additional information.

The administrator creates multiple levels of KPI Breakdowns depending on the definition of the KPI and on the KPI universe. These definitions provide the different levels of breakdown that enable you to obtain very detailed information.


**Example** The executive wants to know what is the attrition rate for the whole enterprise. If the dimensions of the Attrition Rate KPI are organizations in the enterprise, groups, and location, then the administrator can create KPI Breakdowns of the attrition rate per organization, and groups, and then per location. This would provide the executive with the capability to drill down from the attrition rate for the whole enterprise, through the organizations and sub-organizations of the enterprise to the attrition rate of the smallest organization in a specific location.

In the Studio, you can configure Breakdowns according to their dimensions. For each KPI, a list of the relevant entities is provided in a menu and the dimensions of these entities in sub-menus. KPIs can have many levels of breakdowns (limited to 6 levels).

**Note:** When you configure the breakdown you are locking the context of the KPI for which you are creating the Breakdown because the Breakdown inherits the definitions of the KPIs (for



example, the Period definition). You cannot specify a different definition for the Breakdown, and you cannot change the definition of the KPI for which you have created Breakdowns. To unlock the KPI context you must remove the Breakdown.

The list of fields that are available for breakdowns is configured in the Context Designer. By default, numeric fields are not dimensions, therefore they are not available for breakdowns. If you want them to be available for breakdown, open the Context Designer and in the Entities area, click  to enable the creation of Breakdowns. For details, see [Semantic Layer - Context Designer](#) in the *IT Executive Scorecard Administrator Guide*.

Date fields are not available for breakdowns.

**Tip:**

- If you change the name of a KPI that has KPI Breakdowns or the name of a Metric that has Metric Breakdowns, you must perform a new calculation to update names of their overrides. For details about overrides, see ["KPI and Metric Breakdown Overrides" on page 172](#).
- The names of the KPI or Metric Breakdowns are not automatically updated after you change the name of the KPI or Metric parent even after a new calculation. You must access the Studio and manually change the names of the KPI or Metric Breakdowns to match the new parent KPI or Metric names.

## Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab

Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158](#).

## Tasks

This section includes:



["Create a KPI Breakdown" below](#)

["Create a KPI Breakdown of a KPI Breakdown" on the next page](#)

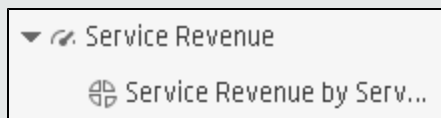
["Remove a Breakdown" on page 163](#)

### Create a KPI Breakdown

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. In the list of entities that opens, select the required dimension.
4. The KPI Breakdown is inserted as a child of the KPI with the Breakdown  icon.


**Example** A typical KPI Breakdown:



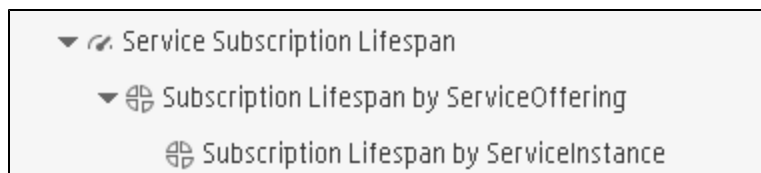
5. You can add more than one breakdowns.

### Create a KPI Breakdown of a KPI Breakdown

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 Breakdown, and click the **Create a breakdown for the KPI**  button in the toolbar.
  - Right-click the relevant KPI Breakdown, and select  **Breakdown** in the menu that opens.
3. In the menu that opens, select the required entity, and if relevant select the required dimension.

A new KPI Breakdown is inserted as a child of the KPI Breakdown in the relevant Scorecard tree with the **Breakdown**  icon.



**Example** A KPI Breakdown of a KPI Breakdown:



4. You can add more breakdown levels depending on the selected dimensions. The dimensions you selected in higher levels of the breakdown are disabled for lower levels.

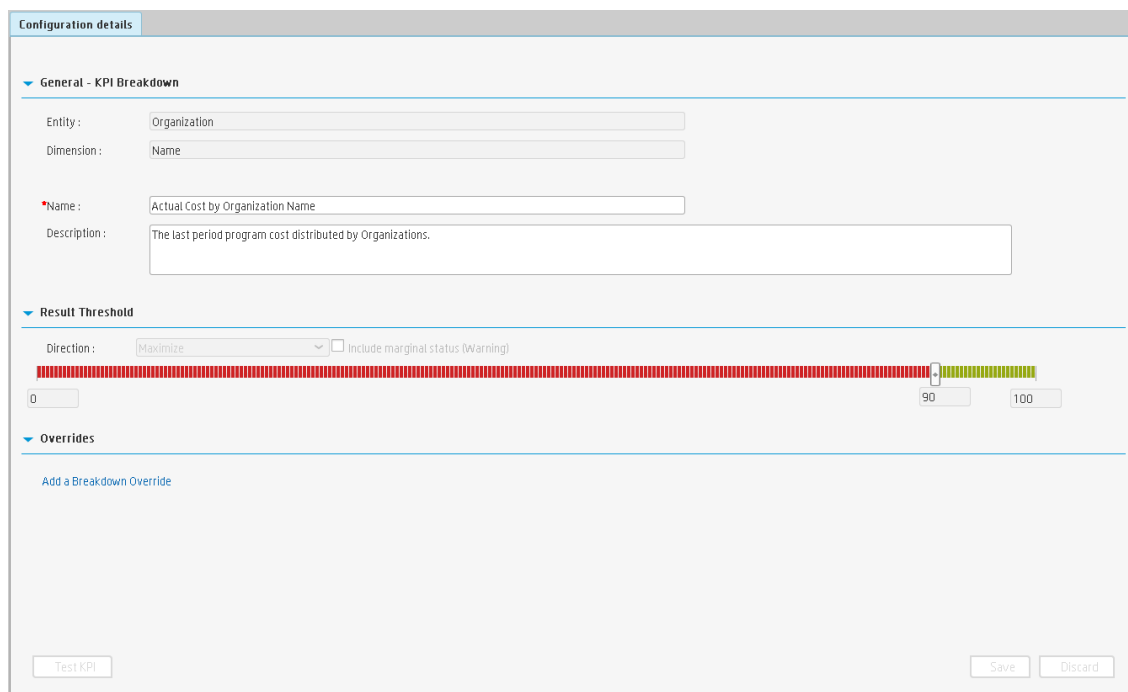
## Remove a Breakdown

To remove a Breakdown, proceed as follows:

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 Breakdown, and click the **Delete the currently selected node**  button in the toolbar.
  - Right-click the relevant KPI Breakdown, and select  **Delete** option in the menu that opens. If you select a Breakdown that has child Breakdowns, these child Breakdowns are also deleted after you confirm the action.
3. Confirm the deletion when you are prompted to do so.

## UI Description

### Configuration Details Tab for a KPI Breakdown



**Configuration details**

▼ **General - KPI Breakdown**

Entity :

Dimension :

\*Name :

Description :

▼ **Result Threshold**

Direction :   Include marginal status (Warning)

0  90  100

▼ **Overrides**

[Add a Breakdown Override](#)

### General Information

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

UI Element	Description
<b>Test KPI</b>	Click to test the KPI. The button is disabled for KPI Breakdowns.
<b>Save</b>	Click to save the changes.
<b>Discard</b>	Click to discard the changes you have made since the last <b>Save</b> operation.

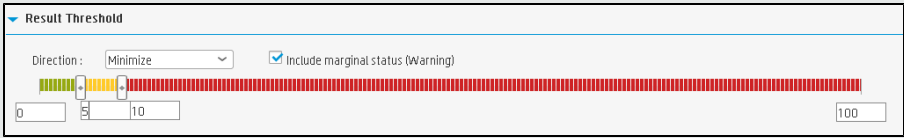
### General - KPI Breakdown

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

UI Element	Description
<b>Entity</b>	The name of the entity you selected when creating the KPI Breakdown.
<b>Dimension</b>	The name of the dimension you selected when creating the KPI Breakdown.
<b>Name</b>	The name of the KPI Breakdown. Its format is <KPI_name> by <entity_name> <dimension_name>.
<b>Description</b>	The description of the KPI. <b>Limitations:</b> The maximum number of characters is 1000.
<b>Id</b>	The ID of the parent KPI. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.
<b>Type</b>	The type of the parent KPI. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click <b>Admin &gt; Scorecard &gt; XS Settings</b> , and in <b>Debug Mode</b> , select the <b>Application Debug Mode</b> setting.



## Result Threshold

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

UI Element	Description
<b>Direction</b>	<p>Displays the threshold direction selected for the parent KPI. For details, see <a href="#">"KPI or Metric Configuration and Calculation Details"</a> on page 90.</p> <div data-bbox="435 558 1370 835" style="background-color: #f0f0f0; padding: 10px;"> <p><b>Example</b></p> <ul style="list-style-type: none"> <li>• If you are measuring the Employee Attrition rate, the lower the value the best the attrition rate, so you would select Direction=Minimize.</li> <li>• If you are measuring revenue, the higher the value, the best the revenue, so you would select Direction=Maximize.</li> </ul> </div>
<b>Threshold</b>	<p>Displays the threshold values selected for the parent KPI. For details, see <a href="#">"KPI or Metric Configuration and Calculation Details"</a> on page 90.</p> <p>Enter in each of the boxes the values to be used as a threshold. The threshold is used to assign a status to the KPI. For details on statuses, see <a href="#">"KPI and Metric Formula and Filter, Threshold, Value, Trend, and Score"</a> on page 22.</p> <div data-bbox="435 1066 1370 1440" style="background-color: #f0f0f0; padding: 10px;"> <p><b>Example</b> As the measurement unit of the Employee Attrition rate is a percentage, the limits of the threshold are 0 and 100. You can decide that a good attrition rate for your company or group is between 0% to 5% (green), a warning rate is between 5% and 10% (yellow), and a bad rate is between 10% and 100% (red).</p>  </div>
<b>Include marginal status (Warning)</b>	<p>Displays whether you selected this option or not when you configured the parent KPI. For details, see <a href="#">"KPI or Metric Configuration and Calculation Details"</a> on page 90.</p>

## Overrides

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

UI Element	Description
<b>Add a breakdown override</b>	Click to open the Add a Breakdown Override dialog box. For details, see " <a href="#">KPI and Metric Breakdown Overrides</a> " on page 172.
<b>Name</b>	The name of the override you just created. Its format is: <KPI_name>: <result_kpi_to_override>
	<b>Edit.</b> Click to edit the selected override. For details, see " <a href="#">KPI and Metric Breakdown Overrides</a> " on page 172.
	<b>Remove.</b> Click to delete the selected override.

# Metric Breakdowns

You can create and manage Breakdowns for a Metric according to the Metric dimensions.

## To access:

Select a Metric Breakdown in the Active KPIs pane.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on the next page](#) ● ["UI Description" on page 170](#)

## Learn More


### About Metric Breakdown

A Metric represents a business context (universe). The value of the Metric is calculated based on the entities (facts or dimensions) that provide information on the business context. A business context can include lots of facts or dimensions.

The administrator creates multiple levels of Metric Breakdown depending on the definition of the Metric and on the Metric universe. These definitions provide the different levels of breakdown that enable you to obtain very detailed information.

In the Studio, you can configure Breakdowns according to their dimensions. For each Metric, a list of the relevant entities is provided in a menu and the dimensions of these entities in sub-menus. Metrics can have many levels of breakdowns (limited to 6 levels).

**Note:** When you configure the breakdown you are locking the context of the Metric for which you are creating the Breakdown because the Breakdown inherits the definitions of the Metrics (for example, the Period definition). You cannot specify a different definition for the Breakdown, and you cannot change the definition of the Metric for which you have created Breakdowns. To unlock the Metric context you must remove the Breakdown.

The list of fields that are available for breakdowns is configured in the Context Designer. By default, numeric fields are not dimensions, therefore they are not available for breakdowns. If you want them to be available for breakdown, open the Context Designer and in the Entities area, click  to enable the creation of Breakdowns. For details, see [Semantic Layer - Context Designer](#) in the *IT Executive Scorecard Administrator Guide*.

Date fields are not available for breakdowns.

### Tip:

- If you change the name of a KPI that has KPI Breakdowns or the name of a Metric that has Metric Breakdowns, you must perform a new calculation to update names of their overrides. For details about overrides, see ["KPI and Metric Breakdown Overrides" on page 172](#).
- The names of the KPI or Metric Breakdowns are not automatically updated after you change the name of the KPI or Metric parent even after a new calculation. You must access the

Studio and manually change the names of the KPI or Metric Breakdowns to match the new parent KPI or Metric names.

## Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab

Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158.](#)

## Tasks



This section includes:

["Create a Metric Breakdown " below](#)

["Create a Metric Breakdown of a Metric Breakdown " below](#)

["Remove a Breakdown" on the next page](#)




### Create a Metric Breakdown

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 Metric, and click the **Create a breakdown for the Metric**  button in the toolbar.
  - Right-click the relevant Metric, and select **Breakdown** in the menu that opens.
3. In the list of entities that opens, select the required dimension.
4. The Metric Breakdown is inserted as a child of the Metric with the Breakdown  icon.
5. You can add more Metric Breakdowns.

### Create a Metric Breakdown of a Metric Breakdown



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 Metric Breakdown, and click the **Create a breakdown for the KPI**  button in the toolbar.
  - Right-click the relevant Metric Breakdown, and select  **Breakdown** in the menu that opens.
3. In the menu that opens, select the required entity, and if relevant select the required dimension. A new Metric Breakdown is inserted as a child of the Metric Breakdown in the relevant Scorecard tree with the **Breakdown**  icon.
4. You can add more breakdown levels depending on the selected dimensions. The dimensions you selected in higher levels of the breakdown are disabled for lower levels.

## Remove a Breakdown

To remove a Breakdown, proceed as follows:

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 Metric Breakdown, and click the **Delete the currently selected node**  button in the toolbar.
  - Right-click the relevant Metric Breakdown, and select  **Delete** option in the menu that opens. If you select a Breakdown that has child Breakdowns, these child Breakdowns are also deleted after you confirm the action.
3. Confirm the deletion when you are prompted to do so.

# UI Description

## Configuration Details Tab for a Metric Breakdown

The screenshot shows a configuration window titled "Configuration details". It has a tab labeled "Configuration details". Below the tab is a section titled "General - Metric Breakdown" with a dropdown arrow. This section contains four input fields: "Entity" with the value "ServiceOffering", "Dimension" with the value "DisplayLabel", "Name" with the value "Incoming Network Traffic by ServiceOffering", and "Description" with the placeholder text "<Description of Breakdown>". Below this section is another section titled "Overrides" with a dropdown arrow, containing a link "Add a Breakdown Override". At the bottom of the window, there are three buttons: "Test Metric", "Save", and "Discard".

### General Information

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

UI Element	Description
<Areas>	"General - Metric Breakdown" on the next page "Overrides" on the next page
Test Metric	Click to test the Metric. The button is disabled for Metric Breakdowns.
Save	Click to save the changes.
Discard	Click to discard the changes you have made since the last <b>Save</b> operation.



### General - Metric Breakdown

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

UI Element	Description
<b>Entity</b>	The name of the entity you selected when creating the Metric Breakdown.
<b>Dimension</b>	The name of the dimension you selected when creating the Metric Breakdown.
<b>Name</b>	The name of the Metric Breakdown. Its format is <Metric_name> by <entity_name> <dimension_name>.
<b>Description</b>	The description of the Metric.  <b>Limitations:</b> The maximum number of characters is 1000.

### Overrides

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

UI Element	Description
<b>Add a breakdown override</b>	Click to open the Add a Breakdown Override dialog box. For details, see " <a href="#">KPI and Metric Breakdown Overrides</a> " on the next page.
<b>Name</b>	The name of the override you just created. Its format is: <Metric_name>: <result_kpi_to_override>
	<b>Edit.</b> Click to edit the selected override. For details, see " <a href="#">KPI and Metric Breakdown Overrides</a> " on the next page.
	<b>Remove.</b> Click to delete the selected override.

# KPI and Metric Breakdown Overrides

You use overrides when you want to assign different thresholds or owners to KPI Breakdowns or Metric Breakdowns.

**To access:**

**To create a new override:** In the Configuration details tab of a KPI Breakdown or Metric Breakdown, click the **Add a Breakdown Override** link in the Overrides area.

**To edit an existing override:** In the Overrides area of the Configuration details tab of a KPI Breakdown or Metric Breakdown, click the **Edit**  button.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on page 174](#) ● ["UI Description" on page 175](#)

## Learn More

### Overrides

When you configure a KPI Breakdown or a Metric Breakdown, its configuration (for example, formula, or period) is the same as the parent KPI's configuration. For details on KPI Breakdowns or Metric Breakdowns, see ["KPI Breakdowns" on page 160](#).

You may want to have a different threshold or owner for specific "branches" of the KPI Breakdowns or Metric Breakdowns. In addition, you may want to change the thresholds of some of the KPI Breakdowns.

### Example

If you define a breakdown by Incident Status for the MTTR KPI, the Dashboard displays information about:

- MTTR
  - MTTR New
  - MTTR Open
  - MTTR Fixed
  - MTTR Closed

Where **Open**, **New**, **Closed**, and **Fixed** are the values of the incident status.

If you create a breakdown of breakdown by Priority for the MTTR by Incident Status KPI Breakdown, the Dashboard displays information about:

- MTTR
- MTTR New
  - MTTR New High
  - MTTR New Medium
  - MTTR New Low
- MTTR Open
  - MTTR Open High
  - MTTR Open Medium
  - MTTR Open Low
- MTTR Fixed
  - MTTR Fixed High
  - MTTR Fixed Medium
  - MTTR Fixed Low
- MTTR Closed
  - MTTR Closed High
  - MTTR Closed Medium
  - MTTR Closed Low

Where **High**, **Medium**, and **Low** are the values of the priority.

As you can specify a different threshold or owner to KPI Breakdowns using overrides, you might want to assign MTTR New to a specific owner, and MTTR Fixed High to another owner with different thresholds to better monitor MTTR.

### Important Information

Overrides work only for the dimension's value you select in the **KPI result to override** or in **Metric result to override**.

Override configurations are not propagated to:

- The parent KPI or Metric or the parent KPI Breakdown or Metric Breakdown.
- Other dimension's values for the same KPI Breakdown or Metric Breakdown.
- The child KPI Breakdowns or Metric Breakdowns.

**Tip:**

- If you change the name of a KPI that has KPI Breakdowns or the name of a Metric that has Metric Breakdowns, you must perform a new calculation to update names of their overrides. For details about overrides, see ["KPI and Metric Breakdown Overrides" on page 172](#).
- The names of the KPI or Metric Breakdowns are not automatically updated after you change the name of the KPI or Metric parent even after a new calculation. You must access the Studio and manually change the names of the KPI or Metric Breakdowns to match the new parent KPI or Metric names.

## Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab

Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158](#).

# Tasks

## Manage Overrides

You can override a KPI or Metric owners and thresholds for specific dimension's values of the KPI Breakdowns.

The override enables the end-user to add, in the Explorer page, annotations for the owner of the KPI Breakdown or Metric Breakdown instead of for the owner of the parent KPI or Metric. The parent KPI or Metric and the KPI Breakdown have the same thresholds but you can use the override so that to configure different thresholds to better fine-tune the monitoring of the objectives of an enterprise department and its different sections.

To create an override:

1. Select in the Active KPI pane, the relevant KPI Breakdown or Metric Breakdown.
2. In the Configuration details pane for that KPI or Metric, click **Add a Breakdown Override** link in the Override area.
3. In the Add Breakdown Override dialog box that opens, select the relevant **KPI result to override** or **Metric result to override**, enter the relevant thresholds and select the owner.
4. Click **OK**. The dialog box closes and the new override is displayed in the Override area of the Configuration details pane of the KPI Breakdown or Metric Breakdown.
5. To save the change, click **Save** in the Configuration details pane.

## UI Description

### Add or Edit a Breakdown Override Dialog Box

**Add a Breakdown Override** Help x

Root KPI: **% of Met SLAs by Service Name**

KPI result to override: % of Met SLAs(0): CRM

---

Adjust threshold and owner details:

0 90 99 100

Owner: <Start typing to filter list of use >

OK Cancel

**Add a Breakdown Override** Help x

Root Metric: **Number of Service Subscriptions - BusinessUnit Name**

Metric result to override: <Select the result to override >

OK Cancel

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

UI Element	Description
Root KPI	Displays the name of the parent KPI or Metric.

UI Element	Description
<b>KPI result to override/ Metric result to override</b>	The field lists the values of the dimension you selected for the KPI Breakdown or Metric Breakdown. You can assign a different threshold, and a different owner for each one of the dimension's values.
<b>Adjust threshold and owner details</b>	<p>Slide the arrows to select the relevant thresholds in the boxes attached to the arrows. The threshold is used to assign a status to the KPI Breakdown.</p> <div data-bbox="435 653 1370 831" style="background-color: #f0f0f0; padding: 5px;"> <p><b>Note:</b> You can only modify the central values of the threshold. You cannot modify the lowest and highest ends. The lowest and highest ends as well as the threshold structure (minimize, maximize, centralize, or Include marginal status (yellow) can only be configured at the level of the parent KPI.</p> </div> <p>For details on statuses, see <a href="#">"KPI and Metric Formula and Filter, Threshold, Value, Trend, and Score" on page 22</a>.</p>
<b>Owner</b>	Select the owner of the override.
<b>OK</b>	<p>Click to save the changes. The override information is added to the <b>Overrides</b> area in the Configuration details tab of the KPI Breakdown or Metric Breakdown. The changes are saved only after you click the <b>Save</b> button in that tab.</p> <p>After you save the change, the KPI Breakdown or Metric Breakdown appears in the Overrides area in the Configuration details tab. You can then edit or delete these overrides from that list.</p>
<b>Cancel</b>	Click to discard the changes you have made.




# KPI or Objective Additional Information

You can add information to a KPI or to an Objective configuration. That information can be a link to:

- A relevant Dashboard page.
- An external URL.
- A BO reports that can provide more information about the KPI or the Objective; for example, its value over time.
- An Xcelcius report configured in the system.

## To access:


In the Configuration details tab of an active KPI or Objective, click the **Add** link in the Additional Info area or click the **Edit**  button.

**Section navigation:** • ["Learn More" below](#) • ["Tasks" below](#) • ["UI Description" on the next page](#)

## Learn More

### KPI or Objective Additional Information

This additional information can help the Executive by providing external information related to a KPI or an Objective, or more details about the KPI or Objective's value, status, and score, in the lower section of the Overview tab in the Explorer tab.

It is also available by clicking the **Additional info**  icon in KPI or Objective tooltips in the FLN dialog box. For details, see ["First Level Navigation \(FLN\) for an Objective, a KPI, or a Metric" on page 365](#).

### Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab

Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158](#).

## Tasks

### Provide Additional Information for a KPI or an Objective

You can provide additional information for active KPIs or Objectives. That information can be links to other Dashboard pages, external pages, BO reports, or Xcelcius reports.

To add additional information for the KPI or the Objective:

1. Select in the Active KPI pane, the relevant KPI or Objective.
2. In the Configuration details pane for that KPI or Objective, click **Add** link in the **Metadata** area.
3. In the **Add** dialog box that opens, select the information type. The fields in the lower section of the dialog box change depending on the information type. Enter the relevant information.
4. Click **Add**. The dialog box closes and the new information is displayed in the **Metadata** area of the Configuration details pane of the KPI or Objective.
5. To save the change, click **Save**.  
 The end-user can view and access the additional information by selecting the relevant active KPI or Objective in the Explorer tab. The additional information is listed in the rightmost pane of the Explorer tab. For details, see "[Explorer](#)" on page 373.

## UI Description

### Add/Edit Info Link Dialog Box

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

UI Element	Description
<b>Information type</b>	<p>Select the type of information you want to provide:</p> <ul style="list-style-type: none"> <li>• <b>External link.</b> When you want the user to access an external link from the KPI in the Dashboard.</li> <li>• <b>BO report.</b> When you want the user to access the selected BO report from the KPI in the Dashboard.</li> <li>• <b>Dashboard page.</b> When you want the user to open a specific page in the Dashboard.</li> <li>• <b>Xcelsius report.</b> When you want the user to access the Xcelsius report from the KPI or Objective in the Dashboard.</li> </ul>

UI Element	Description
<b>Link name</b>	This field appears when you select <b>External link</b> in the <b>Information type</b> list. Enter the name of the link as you want it to appear in the <b>Additional Info</b> table in the <b>Metadata</b> area in the <b>Configuration details</b> tab.
<b>Hyper link</b>	This field appears when you select <b>External link</b> in the <b>Information type</b> list. Enter the URL of the external page you want the user to open.
<b>Report name</b>	This field appears when you select <b>BO report</b> or <b>Xcelsius report</b> in the <b>Information type</b> list. Select the relevant report from the list of all the reports the user has permission to see.
<b>Dashboard page</b>	This field appears when you select <b>Dashboard page</b> in the <b>Information type</b> list. Select the relevant Dashboard page from the list of all the pages that are currently configured in the Dashboard that the user has permission to see.
<b>Add/Cancel</b>	Click <b>Add</b> . The dialog box closes and the new information is displayed in the <b>Metadata</b> area of the Configuration details pane of the KPI. You can then save the changes by clicking <b>Save</b> .

# Cascading Scorecards

Cascading is the ability of the Scorecard to track performance measurement in a top-down approach based on Scorecard objective ownership. This allows executives to measure their direct reports's performance by cascading from their Scorecard to the Scorecard of their direct report Scorecard objectives.

**To access:**

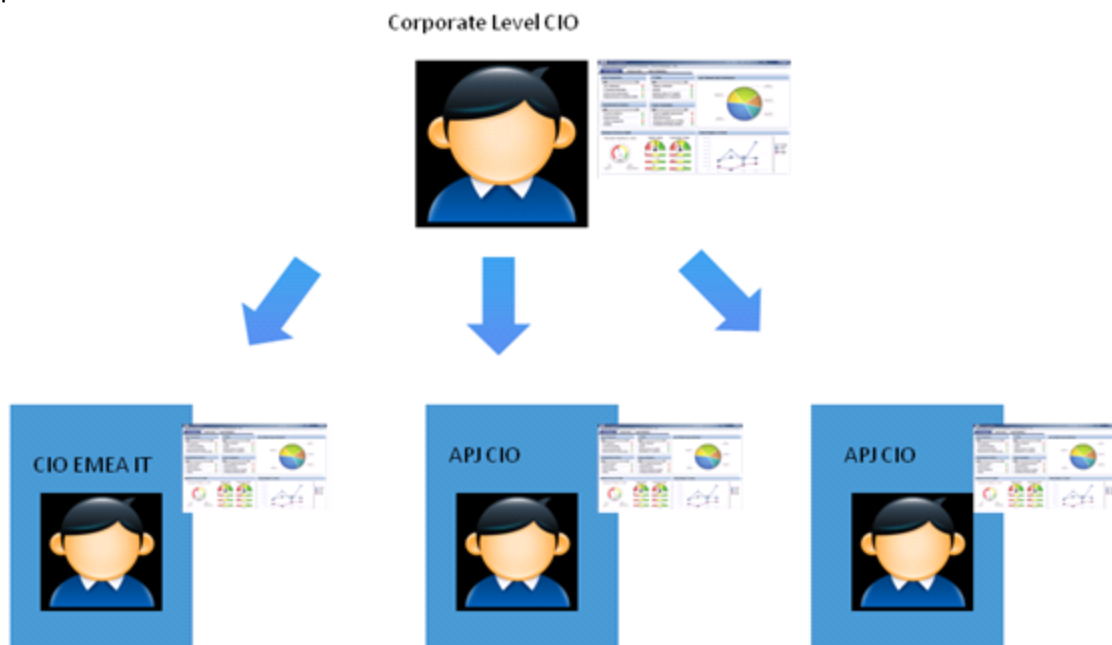
In the Configuration details tab for a Scorecard, click the **Manage Cascading Scorecards** link.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on page 182](#) ● ["UI Description" on page 184](#)

## Learn More

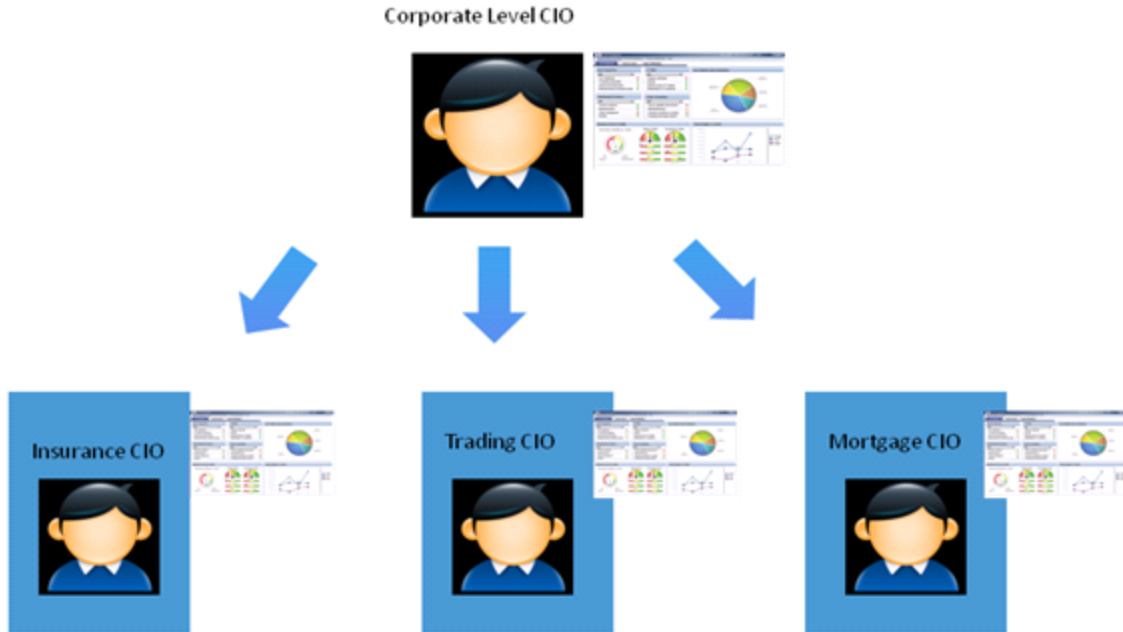
### Geographical Distribution.

In large organizations, the role of the CIO is often extended across divisions or branches of the company with some centralized IT functions and some functions distributed among the departments.



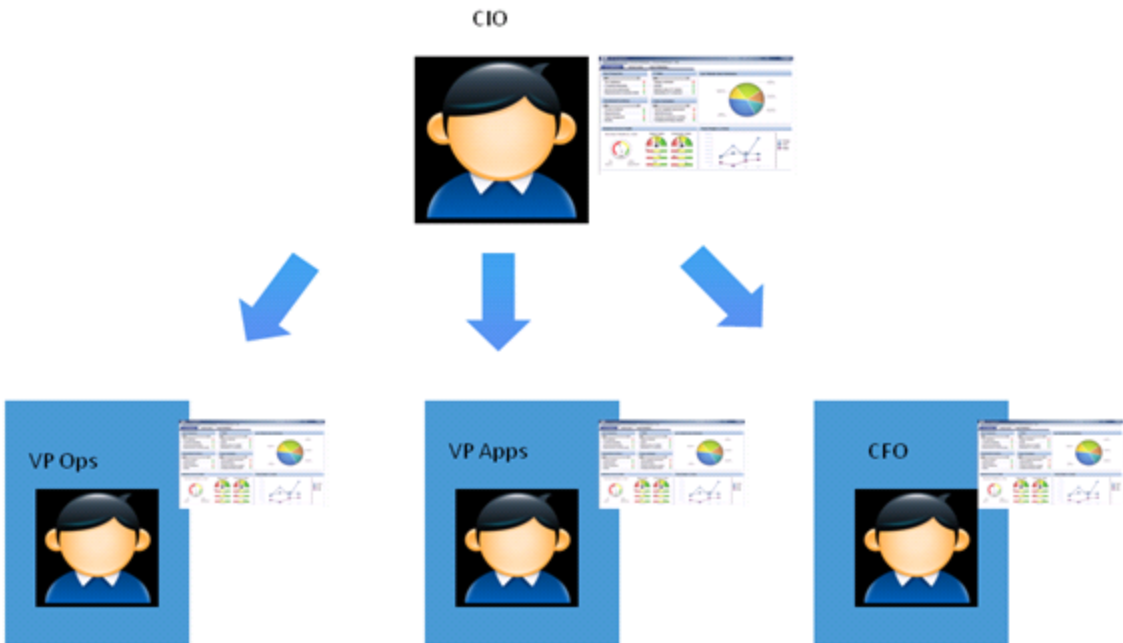
### Functional Distribution of IT.

A company with many large divisions may have a single “Office of the CIO” at the corporate level coupled with “Divisional CIOs” having dual reporting responsibilities to the Business Unit GM and the Corporate CIO.



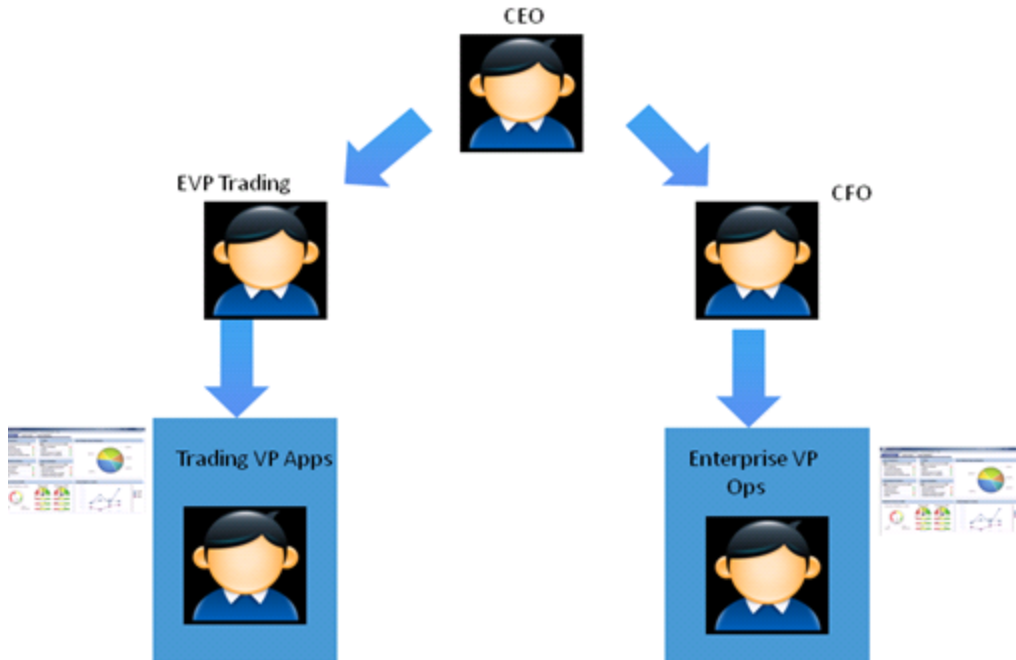
### Organizational Distribution of IT.

The CIO can measure his direct reports (Head of infrastructure and operations).



## Decentralized Distribution of IT.

A common model in US Financial Service and Media is decentralized IT function with Infrastructure/Operations shared services, sometimes with no Enterprise-level CIO.



## Impact of changes to configurations in the Studio on the display in Dashboard and the Explorer tab

Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see ["Synchronization of Changes in the Studio with Display in the Dashboard and the Explorer tab" on page 158.](#)

## Tasks

This section includes:

["Configure the Cascading Scorecards for a Scorecard" below](#)

["Remove a Cascading Scorecard" on the next page](#)

### Configure the Cascading Scorecards for a Scorecard

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 [Movies](#).

## Remove a Cascading Scorecard

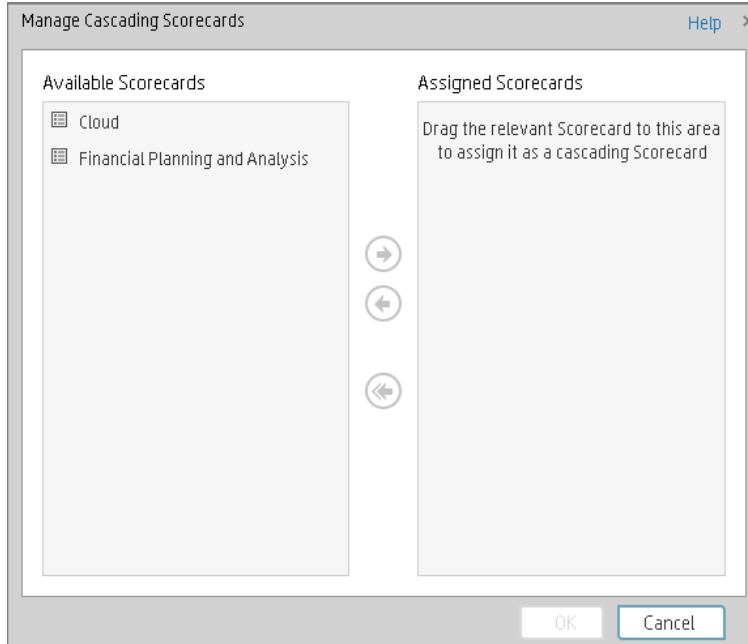
To remove a Cascading Scorecard so it is not assigned to the parent Scorecard:

1. In the Active KPIs pane, select the parent Scorecard.
2. In the corresponding **Configuration Details** pane, in the **Manage Cascading Scorecards** area, click the **Remove**  button of the relevant Cascading Scorecard. The Cascading Scorecard is immediately removed from the list in the **Manage Cascading Scorecards** area.
3. The **Save** and **Discard** buttons are enabled. To save the changes click **Save**.


**Note:** You can also click the **Manage Cascading Scorecards** link, and in the **Manage Cascading Scorecards** dialog box that opens, move the relevant Scorecards from the **Assigned Scorecards** to the **Available Scorecards** areas and click **OK**. The **Manage Cascading Scorecards** dialog box closes. The cascading Scorecard is immediately removed from the list in the **Manage Cascading Scorecards** area. The **Save** and **Discard** buttons are enabled. To save the changes click **Save**.

## UI Description

### Manage Cascading Scorecards Dialog Box



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

UI Element	Description
<b>Available Scorecards</b>	Lists the Scorecards available to be assigned as Cascading Scorecards of the parent Scorecard.
<b>Assigned Scorecards</b>	Lists the Scorecards that you have selected to become the Cascading Scorecards of the parent Scorecard.
	Select the relevant Scorecard and move it to the relevant field using the buttons.
<b>OK</b>	Click to assign the selected Scorecards. The list of Scorecards in the Cascading Scorecards area is immediately updated. The <b>Save</b> and <b>Discard</b> buttons becomes enabled. To save the changes you must click <b>Save</b> in the Configuration details tab.



# Dashboard Display

Dashboard administrators can create role-based workspaces for different types of senior management users.

The Dashboard administrator sets up pages that include components that are of interest to specific users or groups of users. For each page, the administrator defines the layout of components on the page, and the interaction of the page components with one another.

**Note:** When configuring the layout of a page, you can repeatedly split the layout up to 4 times (to produce up to 16 boxes).

## To access:

Close all tabs.

**Section navigation:** ● ["Tasks" below](#) ● ["Dashboard Display" above](#)

## Tasks

This section includes the following tasks:

["Create Pages" on the next page](#)

["Display the Out-of-the-Box Pages" below](#)

["Customize Pages by Adding or Removing Components" on page 187](#)

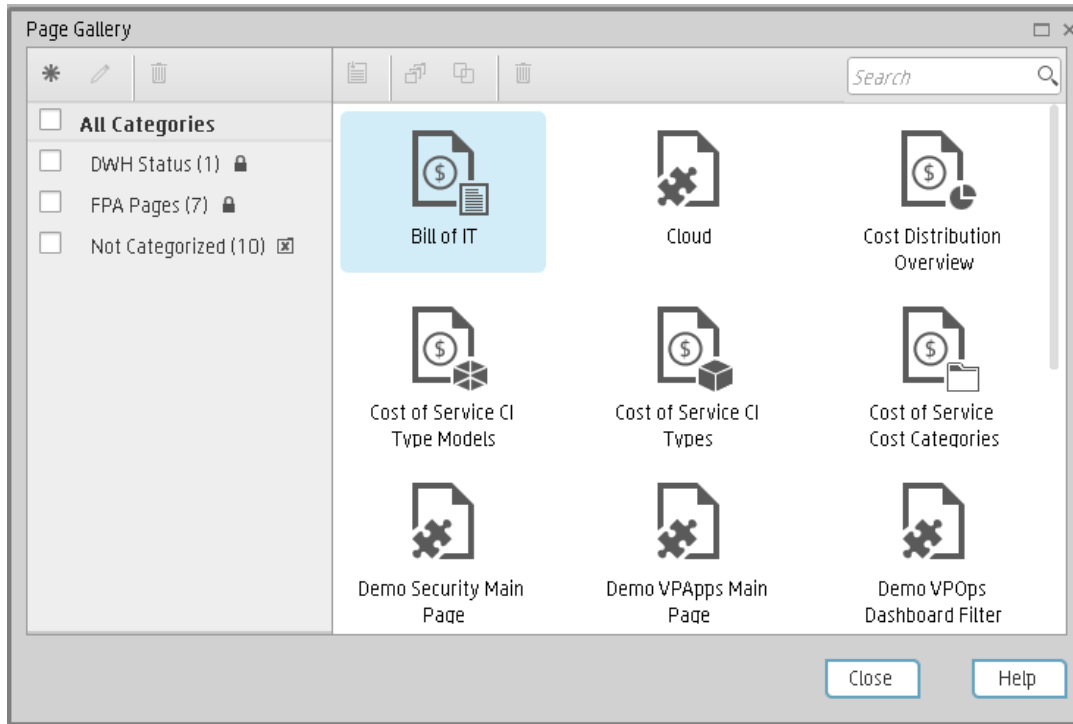
["Set Up Wiring Between Components on a Page" on page 188](#)

["Personalize the Dashboard" on page 188](#)

### Display the Out-of-the-Box Pages

Executive Scorecard provides out-of-the-box pages that you can display in Dashboard.

1. In Dashboard, click the **Page Gallery**  button in the Dashboard toolbar. The Page Gallery dialog box opens and displays the list of the out-of-the-box pages.



2. Double-click the relevant page or drag it to the Dashboard and close the Page Gallery dialog box. Out-of-the-box pages and user-defined pages are displayed. For details about the out-of-the-box pages, see ["Out-of-the-box Dashboard Pages Reference" on page 193](#).

## Create Pages

Pages are collections of components that are displayed together and interact with one another. You can open existing pages from the Page Gallery. The Page Gallery displays existing pages grouped by categories.

You can add new pages to the Dashboard. For details, see ["Dashboard Page" on page 189](#).

**Note:** The administrator configures the **Max number of open pages** and the **Maximum number of active pages**, so if the user opens 5 pages and the maximum number of open pages is set at 3, Dashboard deactivates the 2 least viewed pages to save on browser memory. The pages are reactivated as soon as they are selected by the viewer. The default is unlimited and the administrator configures these settings in **Admin > Foundation > Pages**. For details, [Modify the maximum number of open pages](#) or [Modify the maximum number of active pages](#) in the *IT Executive Scorecard Administrator Guide*.

## Configure a Page Layout

The layout refers to how components are arranged on a page; components can be arranged horizontally, vertically, and in tabs. For details, see ["Page Layout and Components" on page 194](#).

**Note:** When configuring the layout of a page, you can repeatedly split the layout up to 4 times (to produce up to 16 boxes).

## Customize Pages by Adding or Removing Components

These are areas on a page that display information relevant to Dashboard users' business tasks. The Component Gallery contains application components that can be used within the Dashboard, grouped by their source applications.

You can:

- Add components to a page from the Component Gallery.
- Customize pages by adding or removing out-of-the-box components:
  - ["The Historical Metric View Component" on page 221](#)
  - ["The Historical View Component" on page 233](#)
  - ["The KPI View Component" on page 263](#)
  - ["The KPI List Component" on page 247](#)
  - ["The KPI Rolodex Component" on page 255](#)
  - ["The Pie Chart Component" on page 284](#)
  - ["The Scorecard Component" on page 294](#)
  - ["The Web Intelligence Report Viewer Component" on page 302](#)
  - [The Web Intelligence Dynamic Report Viewer Component](#)
  - ["The Web Intelligence Static Report Viewer Component" on page 307](#)
  - ["The SWF Report Viewer Component" on page 315](#)
  - ["The Xcelsius Reports Viewer \(Flash\) Component" on page 320](#)
- Create components and adding them to pages. For details, see ["Customized Static or Dynamic URL Component" on page 328](#).

**Note:** You can add to a page, as many components as you want. The weight of the component may impact the browser performance.

### **Set Up Wiring Between Components on a Page**

Within a page, components can pass information to one another, so that one component can react to a change in another.

**Example** You can set up a page so that if you select a KPI in one component, the other components on the page focus on that KPI as well. Default pages have predefined wiring.

You can define wiring for non-out-of-the-box pages. For details, see ["Wiring Between Components" on page 338](#).

### **Personalize the Dashboard**

You can personalize the Dashboard by adding a picture of the owner. For details, see ["Personalize the Dashboard" on page 345](#).

# Dashboard Page

Dashboard is provided with default pages. The default pages are located in the Page Gallery, together with any pages you have created and saved.

You can also add a new page to the Dashboard.

## To access:

In Dashboard, click the **Save or Save As**  button.

**Section navigation:** ● ["Tasks" below](#) ● ["UI Description" on page 191](#)

## Tasks

This section includes:

["Open a Page" below](#)

["Close a Page or Delete a Page" below](#)




["Add a page to the Dashboard" below](#)

["Duplicate a page" on the next page](#)

### Open a Page

Dashboard is provided with default pages. The default pages are located in the Page Gallery, together with any pages you have created and saved. For details, see ["Dashboard" on page 354](#).

To open a page, you can:

- Click the relevant tab.
- Click  in the Dashboard toolbar, and in the Page Gallery that opens, right-click the page and select  **Open page** option. You can also double-click the relevant page or click the page thumbnail and then the **Open page**  button in the Page Gallery toolbar.




### Close a Page or Delete a Page

To close a page, click the **Remove layout**  button in the page tab. The page is closed in your workspace, but it is not removed from the Page Gallery. You can only delete user-defined pages. You cannot delete out-of-the-box pages.

To delete a page from the page gallery, click the **Page Gallery**  button, select the page, and delete it.




### Add a page to the Dashboard

To add a page, you can:

1. Click the **New Page**  button in the Dashboard toolbar.
2. In the New Page tab that opens, you can format the page. For details, see ["Page Layout and Components" on page 194](#).
3. To save the page, click the **Save or Save As**  button.
4. In the Save to Page Gallery dialog box that opens, enter the name, description, and categories of the page.  
The new page is now listed in the Page Gallery.  
  
The new page also appears in the Dashboard as a new tab.
5. To display the page, in Dashboard, click the **Page Gallery**  button in the Dashboard toolbar.  
For details, see ["Page Layout and Components" on page 194](#).

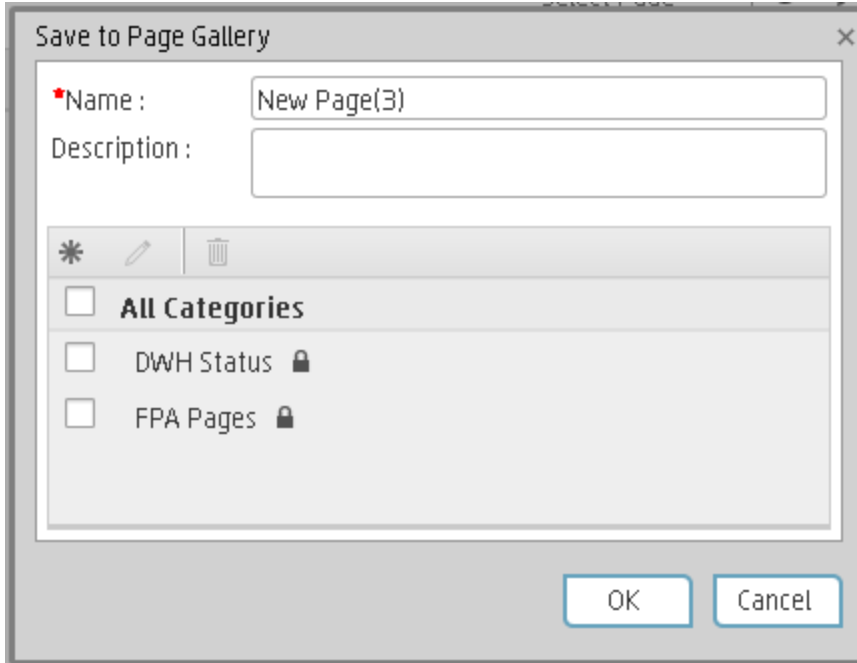
## Duplicate a page

To add a page, you can:

1. In the Dashboard, display the page you want to duplicate either by clicking the relevant tab or by selecting to display the page after clicking the **Page Gallery**  button in the Dashboard toolbar and selecting the relevant page.  
  
You can also open the Page Gallery, select the relevant page and click **Clone Page**  from the toolbar or the right-click menu. Note that this is the only way to duplicate an out-of-the-box page.
2. Once the page you want to duplicate is displayed, click the **Save or Save As**  button.
3. In the Save to Page Gallery dialog box that opens, enter the name, description, and categories of the page and select **Save as new page**.  
The new page is now listed in the Page Gallery.  
  
The new page also appears in the Dashboard as a new tab.

## UI Description

### Save to Page Gallery Dialog Box




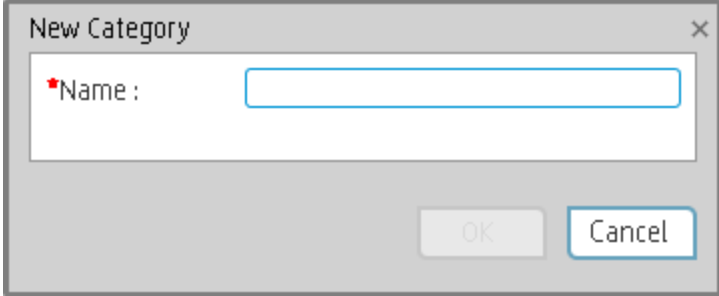

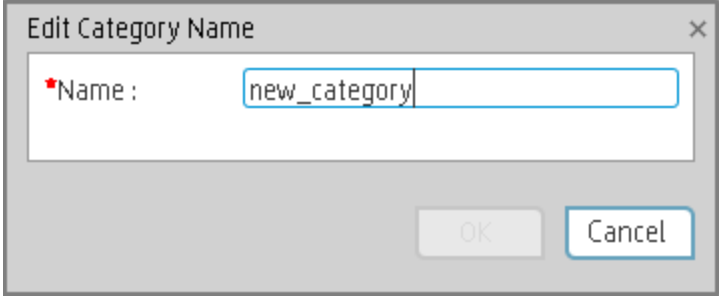


User interface elements are described below:

UI Element	Description
<b>Name</b>	Enter the name of the page as you want it to appear in the tab and in the Page Gallery.
<b>Description</b>	Enter the description of the page.
<b>Save as new page</b>	Click to duplicate the page. It is recommended to specify the name of the duplicated page in the <b>Name</b> field before selecting this option.  This option appears when you have selected an existing Dashboard page.

#### <Categories>

Select the categories where you want the page to appear. You can select more than one category. You can also create new categories.

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

UI Element	Description
	<p><b>New category.</b> Click to create a new category. The New Category dialog box opens where you can enter the name of a new category and click <b>OK</b> to save it.</p> 
	<p><b>Edit Category Name.</b> Select the relevant category, and click the button to edit the category. The Edit Category Name dialog box opens where you can change the name of the category and click <b>OK</b> to save the change.</p> 
	<p><b>Delete Category.</b> Select the relevant category, and click the button to delete it.</p>
<p><b>&lt;List of categories&gt;</b></p>	<p>The area lists the available categories.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• When you select/clear <b>All Categories</b> all categories are selected/unselected.</li> <li>•  indicates that you cannot edit or delete the corresponding category.</li> </ul>



# Out-of-the-box Dashboard Pages Reference

The out-of-the-box pages are:

- [ABC - Operational Status Report](#) (Data Warehouse - ABC Job Stream Status) in the *IT Executive Scorecard Reports Reference Guide*.
- [Bill of IT](#) in the *IT Executive Scorecard Reports Reference Guide*
- [Cloud](#) in the *VP of Applications Content Acceleration Pack Guide*
- [Cost Distribution Overview Page](#) in the *IT Executive Scorecard Reports Reference Guide*
- [Cost of Service CI Types Models Page](#) in the *IT Executive Scorecard Reports Reference Guide*
- [Cost of Service CI Types Page](#) in the *IT Executive Scorecard Reports Reference Guide*
- [Cost of Service Cost Categories Page](#) in the *IT Executive Scorecard Reports Reference Guide*
- [Demo Security Main Page](#) in the *Security Enterprise Architecture Content Acceleration Pack Guide*.
- [Demo VPApps Main Page in Dashboard](#) in the *VP of Applications Content Acceleration Pack Guide*.
- [Demo VPOps Dashboard Filter Page in Dashboard](#) in the *VP of Operations Content Acceleration Pack Guide*.
- [Demo VPOps Main Page in Dashboard](#) in the *VP of Operations Content Acceleration Pack Guide*
- [Financial Summary Page](#) in the *IT Executive Scorecard Reports Reference Guide*
- [Multi-Dimensional Cost Comparison Analysis Report](#) in the *IT Executive Scorecard Reports Reference Guide*.
- [Resource Providers](#) in the *VP of Applications Content Acceleration Pack Guide*

# Page Layout and Components

You can view default pages and create new pages containing components using the Dashboard workspace . Each page is displayed as a tab within the workspace.

## To access:

Dashboard is displayed when you log on HP IT Executive Scorecard. You can also access the display by closing the other tabs.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" below](#) ● ["UI Description" on page 201](#)

## Learn More

- For a list of default pages, see ["Dashboard" on page 354](#).
- Executive Scorecard includes default components. For a list of default components, see ["Dashboard Display" on page 185](#).

## Tasks

This section includes:

["Configure a Page Layout" below](#)

["Configure Page Layout – Configure the Layout of Components on a Page Scenario" below](#)

["Configure Page Layout – Populate a tabbed component in a page scenario" on page 197](#)

["Page Layout and Components" above](#)

### **Configure a Page Layout**

In the Dashboard, in the relevant page tab, you can configure how the components are displayed.

You can configure the page with:

- A horizontal layout (the components are displayed side by side)
- A vertical layout (the components are displayed one above the other).
- A combination of horizontal and vertical layout.
- Tabs (the components are displayed in tabs inside the layout itself).

It is recommended that you plan in advance which components you want to place on your page and how they should be arranged, and then configure your page layout accordingly.

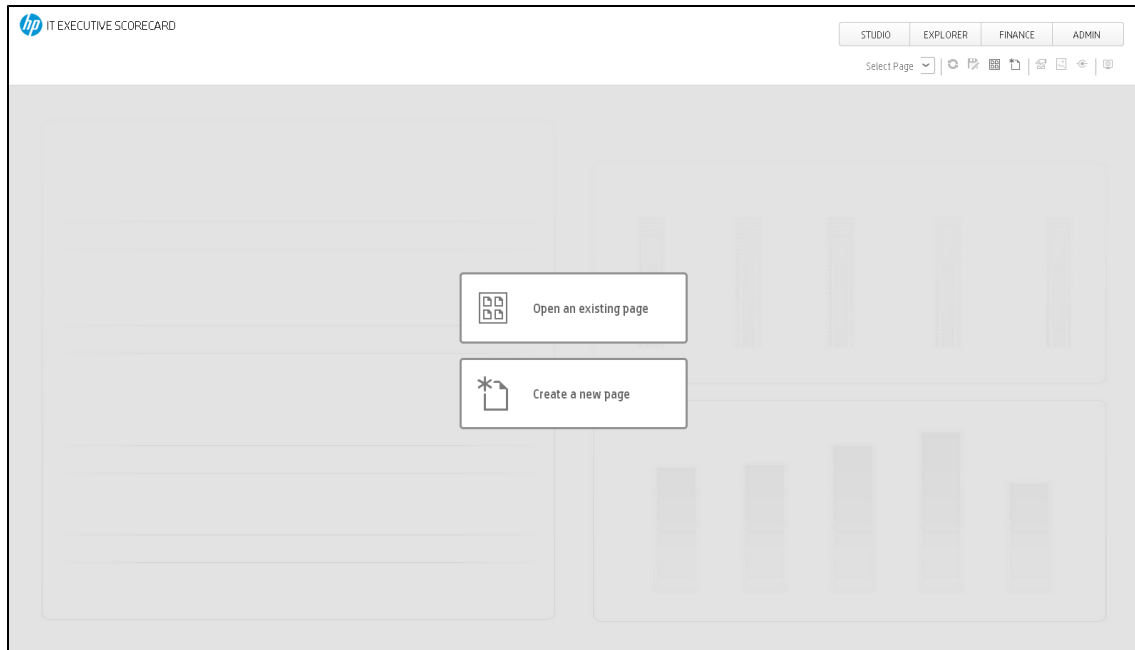
### **Configure Page Layout – Configure the Layout of Components on a Page Scenario**

The following section provides an example of how an administrator configures the layout of components on a page.

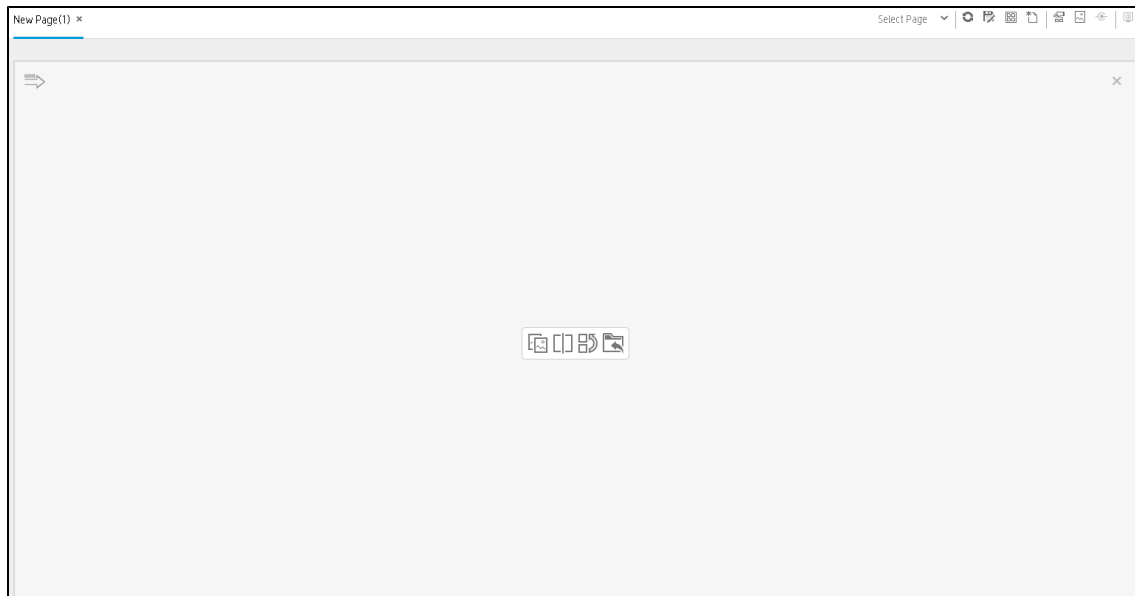
It is recommended that you plan in advance which components you want to place on your page and how they should be arranged, and then configure your page layout accordingly

### Open a page

In the application, Adam closes all the tabs if they are open to display the Dashboard.

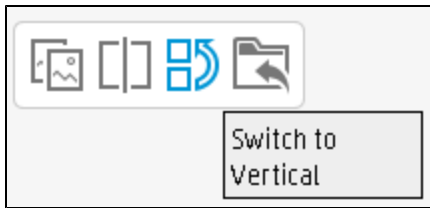


Adam opens a new page, which has a default layout:

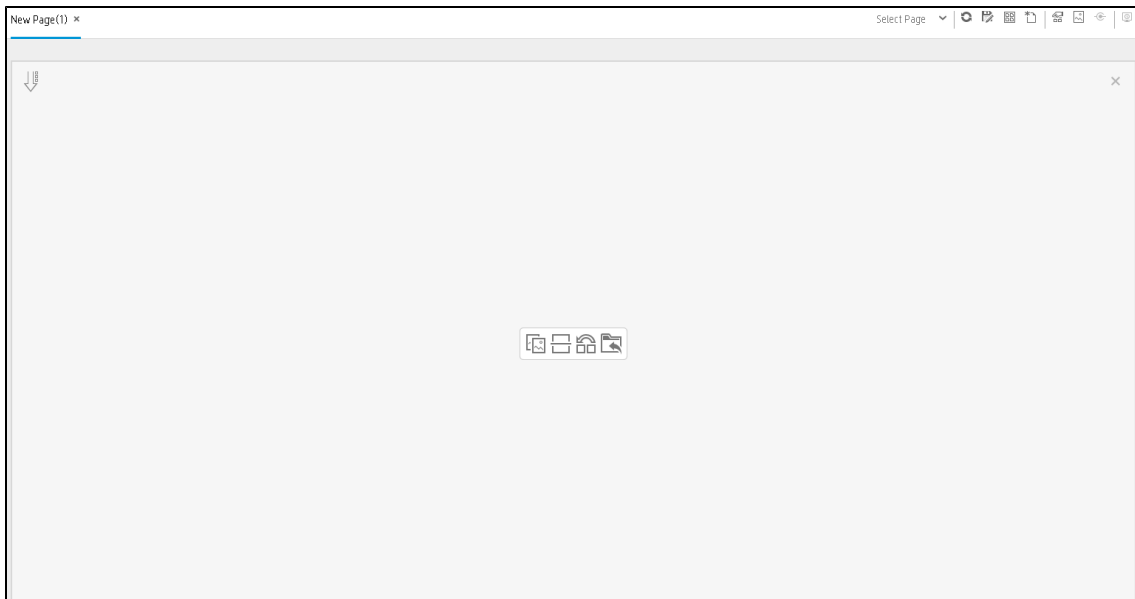


### Switch the page layout to horizontal


From the layout tools in the central area, he clicks **Switch to Vertical**.

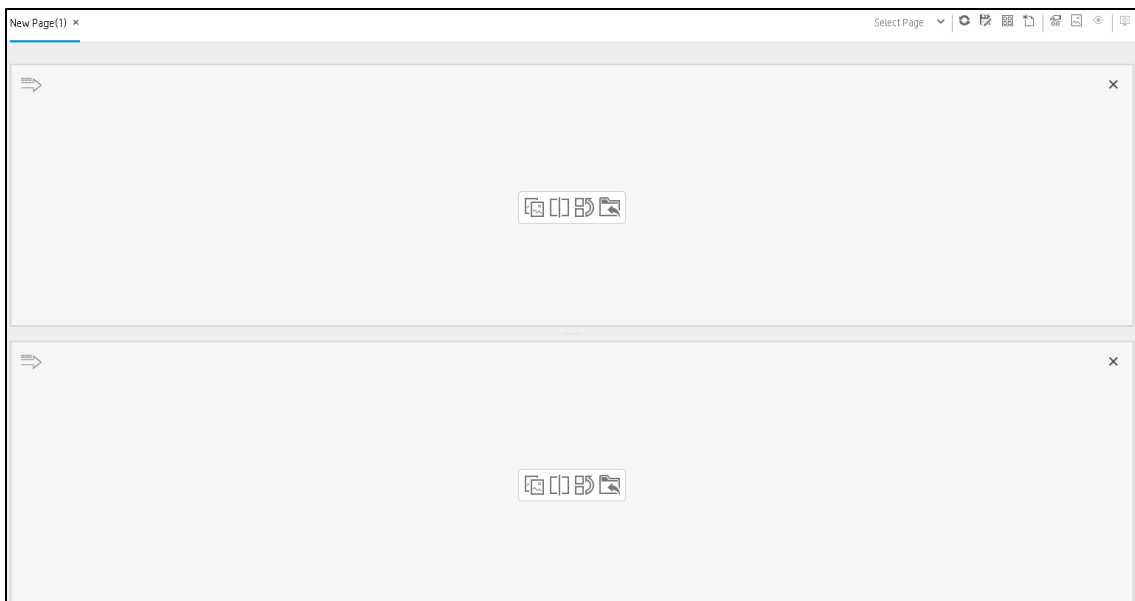


The layout is now oriented vertically:




### Split the page

Adam then clicks **Split**  to divide the layout into a left and right pane:



### Create a tab layout in the left pane

Within the layout at the top of the screen, he clicks **Switch to tabs**  to create a tabbed area in the area:



### Result

Within the layout, Adam can now add components to the two areas; the components added to the top of the screen are displayed in tabs, and the components added to the lower part of the screen are displayed vertically:

### Configure Page Layout – Populate a tabbed component in a page scenario

The following section provides an example of how an administrator configures a page component to include tabs.


It is recommended that you plan in advance which components you want to place on your page and how they should be arranged, and then configure your page layout accordingly.

Add a page to the Dashboard

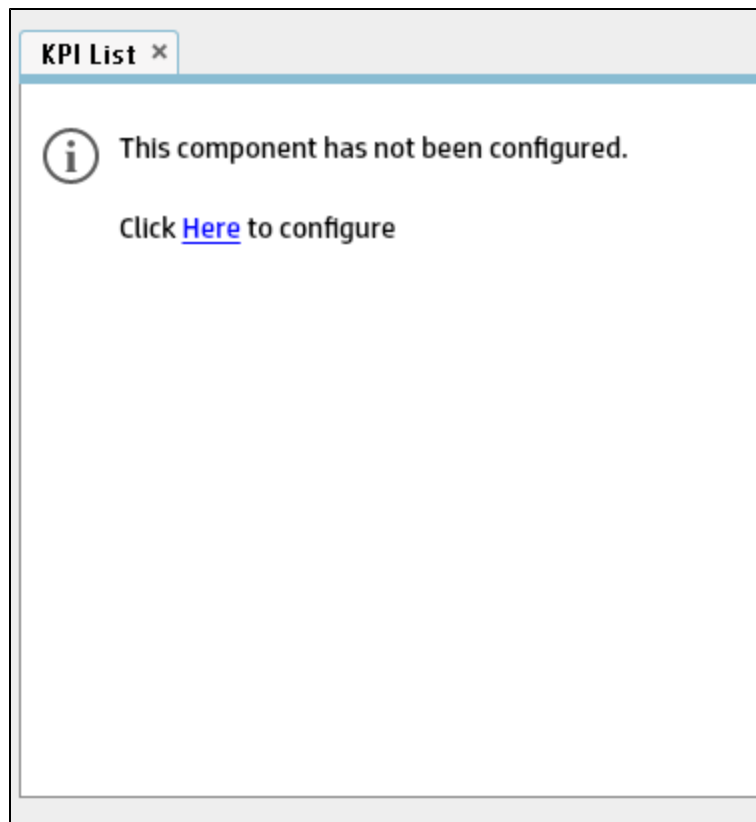
1. Add a page to the Dashboard, split it into two horizontal areas, and set the top area to tabs. For details, see ["Configure Page Layout – Configure the Layout of Components on a Page Scenario" on page 194.](#)
2. You can now format the page.


Within the layout, you can now add components to the two areas; the components added to the upper section are displayed in tabs and the component added in the lower section of the page is displayed vertically .

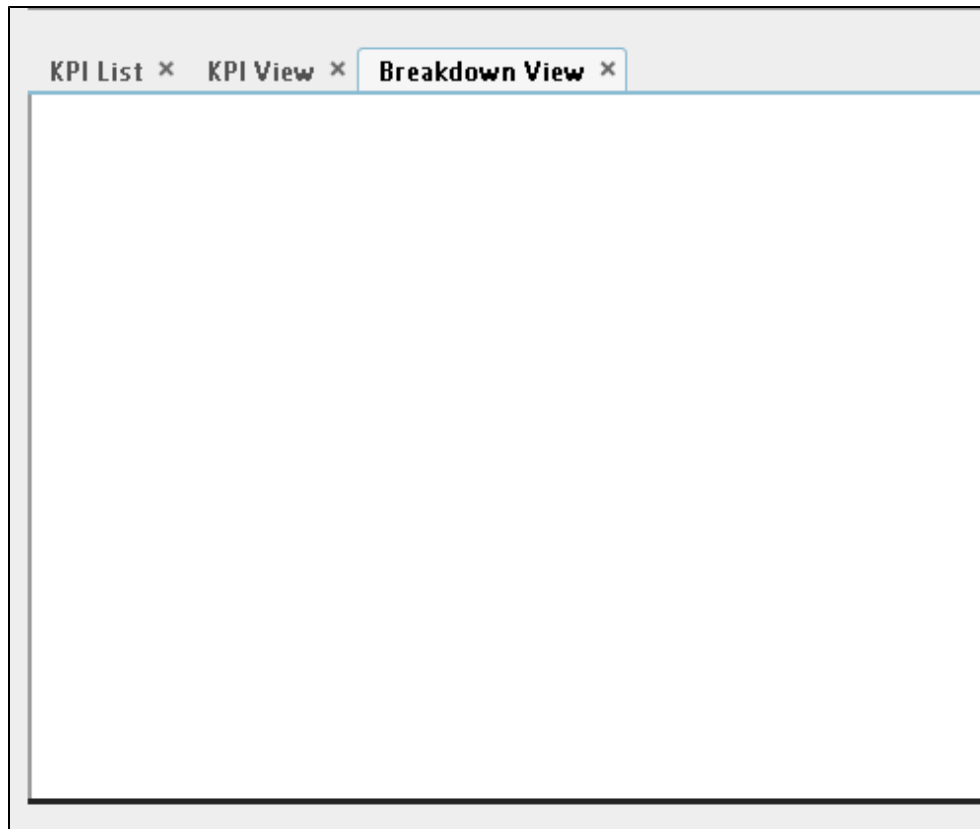
a. In the top section of the page, add the KPI List Component to the Dashboard Page

- i. Click the **Component Gallery**  button.
- ii. In the Component Gallery page that opens, click or double-click the KPI List component to place it in the layout area, or select the component and drag it to an area on the page. Click Close to view the results.


The lower part of the page is as follows:

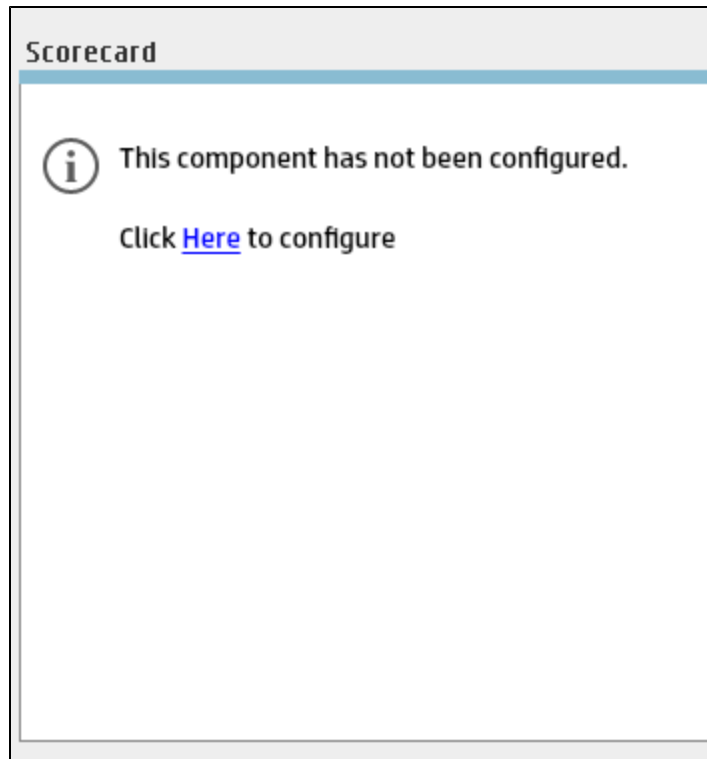


- iii. Click the **Components**  button and in the same way, add more tabbed components.



You can now select what you want to display in each component. For details, see the relevant component sections.

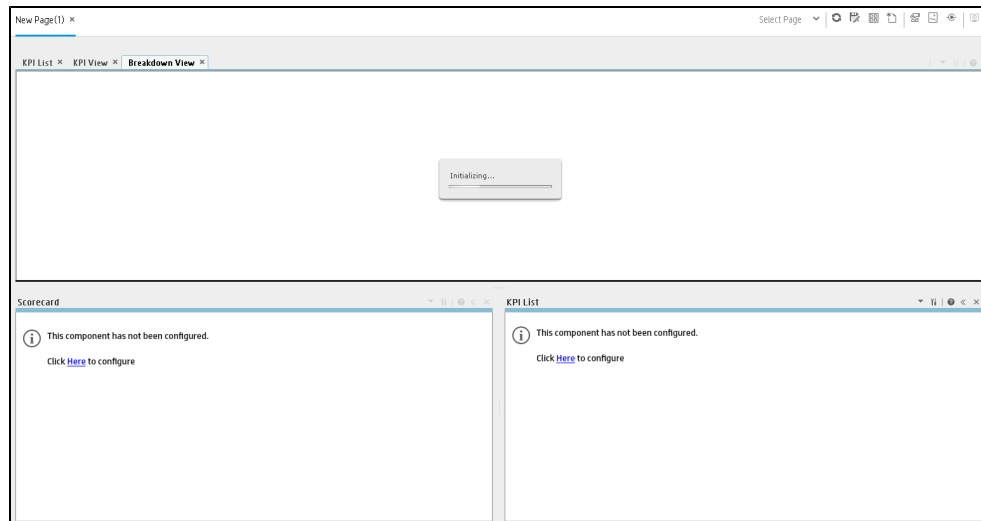
- b. In the lower section of the page, add the Scorecard Component to the Dashboard Page
  - i. Click the **Component Gallery**  button.
  - ii. In the Component Gallery page that opens, click or double-click the Scorecard component to place it in the layout area, or select the component and drag it to an area on the page.





Note that double-click only works if you open the Component Gallery from the layout itself and not from the toolbar.

- 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.
- iii. Close the Component Gallery page. The Scorecard component appears in the page.





You can now select what you want to display in the component by clicking the **Configure Component**  button. For details, see "[The Scorecard Component](#)" on [page 294](#).

3. You can now save the page by clicking . In the Save to Page Gallery dialog box that opens, enter the name, description, and categories of the page. The new page is now listed in the Page Gallery.

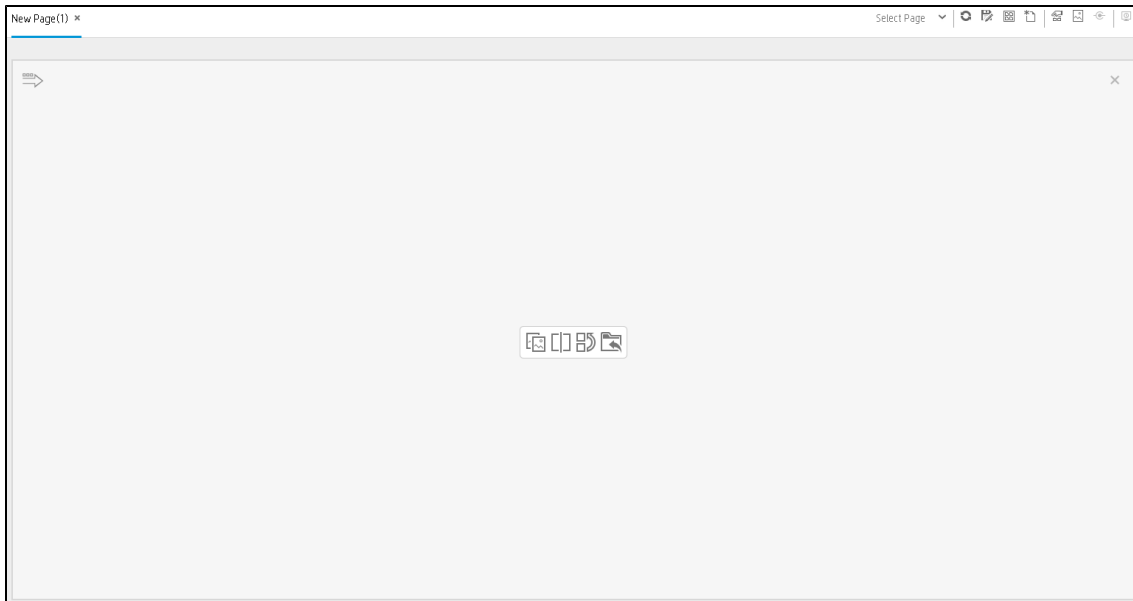
The new page also appears in the Dashboard as a new tab.

4. To display the page, in Dashboard, click the **Page Gallery**  button in the Dashboard toolbar and select the relevant page.

## UI Description

### Dashboard Workspace





The Dashboard workspace enables you to view default pages, and to create new pages containing components. Each page is displayed as a tab within the workspace.







### Page Management Toolbar

The Page Management toolbar on the upper right side of the workspace, enables you to create pages, add components to pages, and define how components interact between one another.

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

UI Element	Description
<b>Select Page</b>	Select a page from this dropdown list to open the page in your workspace. The list contains the pages that are defined in the Page Gallery.  If you start typing a page name in this box, the list is filtered.
	<b>Refresh.</b> Click to refresh the page.
	<b>Save or Save As.</b> Click to save the current page to the Page Gallery. A dialog box enables you to name the page, give the page a description, and select a category for the page. The description appears as a tooltip for the page, within the Page Gallery.
	<b>Page Gallery.</b> Click to open the Page Gallery. The Page Gallery contains default pages, as well as pages you have saved. You can then edit page definitions, or open pages. For user interface details, see " <a href="#">Page Categories</a> " on page 205.
	<b>New Page.</b> Click to create a new page. After opening a new page you can configure its layout, add components to the page, and define wiring between the components. For task details, see " <a href="#">Dashboard Page</a> " on page 189.










	<p><b>Edit Page Layout.</b> Click to modify the layout of an existing page. The current layout of the page is displayed. You can use the Layout tools in the top left corner of each layout to modify the layout areas. For details, see "<a href="#">Layout Tools</a>" below.</p> <p><b>Exit Editing.</b> When you are done, click this button to stop editing.</p>
	<p><b>Component Gallery.</b> Click to open the Component Gallery. It contains default components, as well as components you have added. You can then edit component definitions, or add components to a page. For user interface details, see "<a href="#">Component Categories</a>" on page 209.</p>
	<p><b>Page Wiring.</b> Click to define the wiring between components; this determines how components interact with one another. For user interface details, see "<a href="#">Wiring Between Components</a>" on page 338.</p>
	<p><b>Start/Stop Slideshow.</b> Click to start a slideshow of open pages. A dialog box enables you to define how often the pages are rotated.</p> <div data-bbox="410 793 1187 1199" data-label="Image"> </div> <p>If Dashboard includes multiple pages, up to 5 of the most popular pages are immediately available for display when you switch to them. The other pages are least viewed pages, meaning that are silently deactivated in the background. When you select them, it might take a few seconds until they load and display their content.</p> <p>If a slideshow is running, click this button to stop the slideshow.</p>

### Layout Tools

When a layout is empty, the layout tools on the upper left area enable you to define the layout. Icons in the center of the layout indicate the type of layout: horizontal, vertical, or tabbed.

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

UI Element	Description
Layout Tools:	

X	<b>Remove Layout.</b> Click (upper-right corner) to remove a layout from the page.
	<b>Add Component.</b> Click to open the Component Gallery. You can then double-click a component to place it in the layout area. For user interface details, see " <a href="#">Component Categories</a> " on page 209.
	<b>Split.</b> Click to divide a vertical layout into two layouts, one above the other.  When configuring the layout of a page, you can repeatedly split the layout up to 4 times (to produce up to 16 boxes).
	<b>Split.</b> Click to divide a horizontal layout into two layouts, side by side.  When configuring the layout of a page, you can repeatedly split the layout up to 4 times (to produce up to 16 boxes).
	<b>Switch to Vertical.</b> Click to change the layout from vertical or tabbed to horizontal. Components placed in this area will be added one above the other.
	<b>Switch to Horizontal.</b> Click to change the layout from horizontal or tabbed to vertical. Components placed in this area will be added side by side.
	<b>Switch to Tabs.</b> Click to change the layout from vertical or horizontal, to a tab layout. Components placed in this area will be added as tabs.
<b>Layout Icons:</b>	
	<b>&lt;Horizontal layout&gt;.</b> This icon in the upper-left corner of a layout indicates that the layout is horizontal. Components placed in this area will be added side by side.
	<b>&lt;Vertical layout&gt;.</b> This icon in the upper-left corner of a layout indicates that the layout is vertical. Components placed in this area will be added one above the other.
	<b>&lt;Tabbed layout&gt;.</b> This icon in the upper-left corner of a layout indicates that the layout is horizontal. Components placed in this area will be added as tabs.

# Page Categories

Dashboard provides out-of-the-box pages and components. You can customize a Dashboard display by customizing these pages and components. You can also create your own pages and components and combine them to create a customized Dashboard. To help you manage pages you can use page categories.

## To access:

In Dashboard, click the Page Gallery  button.

**Section navigation:** ● ["Tasks" below](#) ● ["UI Description" on page 207](#)

## Tasks

This section includes:

["Modify Page Categories" below](#)

["Create a New Page Category" below](#)

["Rename a User-Defined Page Category" on the next page](#)

["Delete a User-Defined Page Category" on the next page](#)

["Assign a Page to a Category" on the next page](#)

["Modify the Category Assignments of a Page" on the next page](#)

### Modify Page Categories

Dashboard contains default categories within the Page Gallery to help you organize pages.

This section describes how to work with categories within the Page Gallery to help you organize pages.


You can add categories, edit or delete user-defined categories, and add or remove pages from categories.

**Note:** Categories are not mutually exclusive; you can assign a page to more than one category.

### Create a New Page Category

Dashboard is provided with categories to which pages are assigned.

To add a new page category:


1. Click the Page Gallery button on the Page Management toolbar, then click the **New Category**  button (on the left section of the dialog box).


2. In the New Category dialog box, enter the name of the new category.
3. Click **OK**.

You can then assign existing pages to the category, or add new external components to the category.


### **Rename a User-Defined Page Category**


To rename a user-defined page category:

1. Select the category and click the **Edit Category Name**  button.
2. In the Edit Category dialog box, change the name of the category.
3. Click **OK**.


Note that default categories (marked with a  icon) cannot be renamed.

### **Delete a User-Defined Page Category**


To delete a user-defined page category, select the category and click the **Delete Category**  button.

Note that default categories (marked with a  icon) cannot be deleted.

### **Assign a Page to a Category**

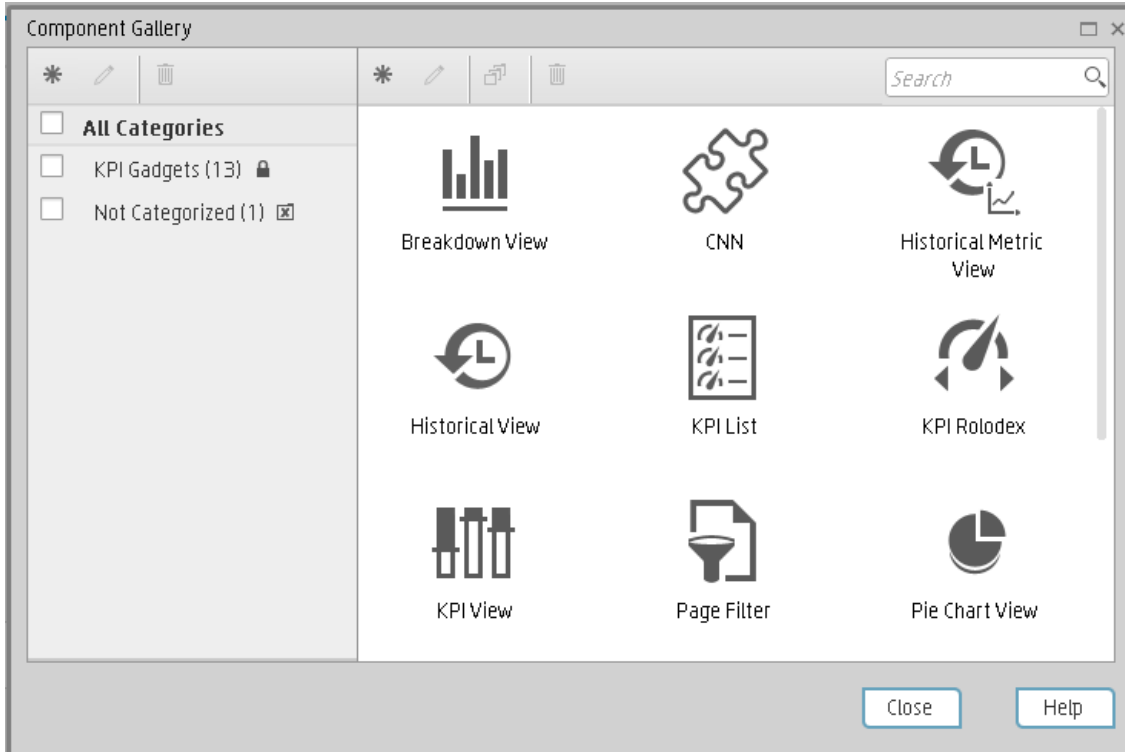
To assign a page to a category, right-click the page and select the  **Categorize** (page or component) option. In the Categorize Page dialog box that opens, select one or more categories to which you want to assign the page or component, and click **OK**.

### **Modify the Category Assignments of a Page**

To change the category assignments of a page, right-click it and select the  **Categorize** (page or component) option. In the Categorize Page dialog box that opens, modify the selection of categories, and click **OK**.

## UI Description



### Page Gallery Dialog Box



#### Categories (left side)





User interface elements are described below:

UI Element	Description
	<b>New Category.</b> Click to create a new category; you can then assign pages to this category. For details see " <a href="#">Component Categories</a> " on page 209.
	<b>Edit Category Name.</b> Select a user-defined category and click to rename (default categories cannot be renamed).
	<b>Delete Category.</b> Select a user-defined category and click to delete (default categories cannot be deleted).

<b>Categories</b>	<p>This contains a list of categories to which pages are assigned. A category can have the following indications after its name:</p> <ul style="list-style-type: none"> <li>• A number following the category name shows how many pages are in the category.</li> <li>•  indicates that the category is a default category, and cannot be renamed or deleted.</li> <li>•  indicates that this category groups all the pages that are not assigned to a category.</li> </ul> <p>You can use the toolbar to manage a category, or select a category to display its pages on the right side of the dialog box.</p> <p>Note that categories are not mutually exclusive; you can assign a page to more than one category.</p>
-------------------	--

### Pages (right side)

User interface elements are described below:

UI Element	Description
	<p><b>Open Page.</b> Select a page and click to open it in the Dashboard workspace.</p> <p>You can also double-click a page within the Page Gallery .</p>
	<p><b>Categorize Page.</b> Select a page and click to assign it to a category.</p>
	<p><b>Clone Page.</b> Select a page and click to create a copy of the page. You can then make changes to the page and save it with a new name.</p> <p>A dialog box enables you to name the new page, give the page a description, and select a category for the page. The description appears as a tooltip for the page within the Page Gallery.</p>
	<p><b>Delete Page.</b> Select a page and click to delete it from the gallery.</p>
<b>Pages</b>	<p>This shows the default pages available for display in Dashboard, as well as custom pages that you have saved. You can select a page and use the toolbar to edit page definitions, or double-click a page to open it in the Dashboard workspace.</p> <p>Executive Scorecard provides out-of-the-box pages that you can display immediately in the Dashboard. For details about the out-of-the-box pages, see <a href="#">"Out-of-the-box Dashboard Pages Reference" on page 193</a>.</p>
<b>Search box</b>	<p>Enter a text string to search for a specific page.</p>



# Component Categories


Dashboard contains default categories within the Components Gallery to help you organize components.

This section describes how to work with categories within the Components Gallery to help you organize components.

You can add categories, edit or delete user-defined categories, and add or remove components from categories.

**Note:** Categories are not mutually exclusive; you can assign a component to more than one category.

## To access:

In the Executive Dashboard, click the **Component Gallery**  button.

In a Dashboard page, click the **Add component**  button.

**Section navigation:** ● ["Tasks" below](#) ● ["UI Description" on page 211](#)

## Tasks

This section includes:

["Create a New Category" below](#)

["Rename a User-Defined Category" on the next page](#)


["Delete a User-Defined Category" on the next page](#)

["Assign a Component to a Category" on the next page](#)

["Modify Category Assignments of a Component" on the next page](#)

### Create a New Category


Dashboard is provided with categories to which components are assigned. To add a new category:


1. Click the **Component Gallery** button on the Page Management toolbar, then click the **New Category**  button (on the left section of the dialog box).
2. In the New Category dialog box, enter the name of the new category.
3. Click **OK**.

You can then assign existing components to the category, or add new external components to the category.

## Rename a User-Defined Category


To rename a user-defined category:

1. Select the category and click the **Edit Category Name**  button.
2. In the Edit Category dialog box, change the name of the category.
3. Click **OK**.


Note that default categories (marked with a  icon) cannot be renamed.

## Delete a User-Defined Category


To delete a user-defined category, select the category and click the **Delete Category**  button.

Note that default categories (marked with a  icon) cannot be deleted.

## Assign a Component to a Category

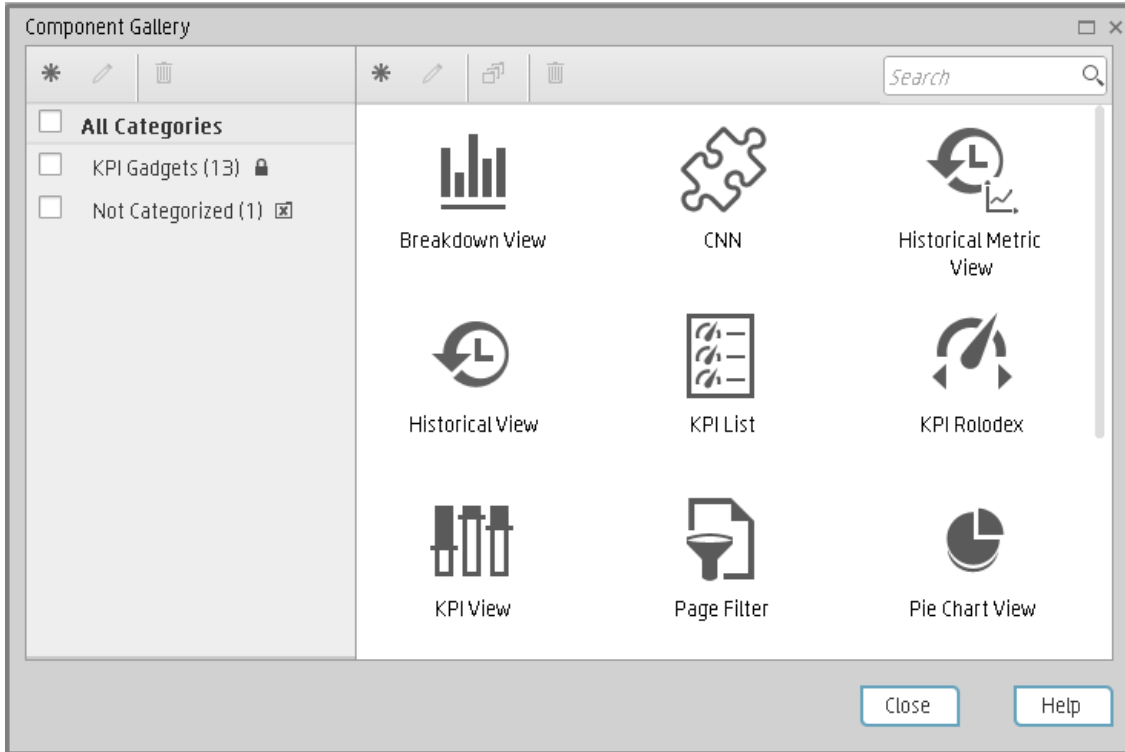
To assign a component to a category, select it and select the **Categorize**  button in the toolbar (right side). In the Categorize Component dialog box that opens, select one or more categories to which you want to assign the page or component, and click **OK**.

## Modify Category Assignments of a Component

To change the category assignments of a component, select it and select the **Categorize**  button in the toolbar (right side). In the Categorize Component dialog box that opens, modify the selection of categories, and click **OK**.

## UI Description


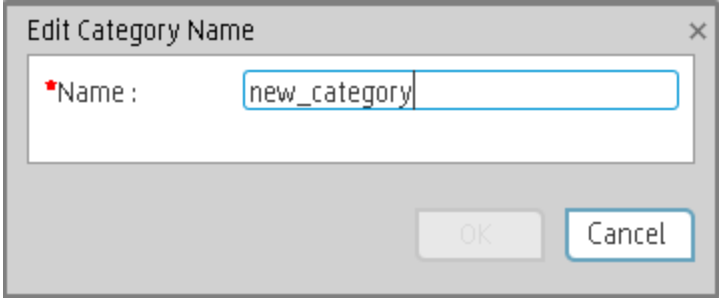



### Component Gallery Dialog Box



#### Left Pane




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


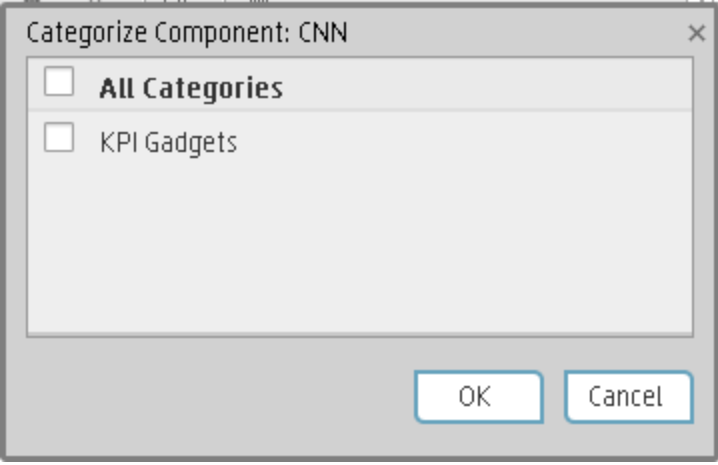
UI Element	Description
	<p><b>New category.</b> Click to create a new category. The New Category dialog box opens where you can enter the name of a new category and click <b>OK</b> to save it.</p>

UI Element	Description
	<p><b>Edit Category Name.</b> Select the relevant category, and click the button to edit the category. The Edit Category Name dialog box opens where you can change the name of the category and click <b>OK</b> to save the change.</p> 
	<p><b>Delete Category.</b> Select the relevant category, and click the button to delete it.</p>
<List of categories>	<p>The pane lists the categories.</p> <ul style="list-style-type: none"> <li>• When you select/clear <b>Categories</b> all categories are selected/unselected.</li> <li>•  indicates that you cannot edit the corresponding category.</li> <li>•  indicates that this category groups all the components that are not assigned to a category.</li> </ul>

### Right Pane

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

UI Element	Description
	<p><b>Add External Component.</b> Click to add an external component to the gallery of components. The New Component dialog box opens. For details, see <a href="#">"Customized Static or Dynamic URL Component" on page 328.</a></p>
	<p><b>Edit Component Properties.</b> Select the relevant component, and click the button to edit the component. The Edit Component dialog box opens where you can change the selected component configuration. For details, see <a href="#">"Customized Static or Dynamic URL Component" on page 328.</a></p>
	<p><b>Delete Component.</b> Select the relevant component, and click the button to delete it.</p>

UI Element	Description
	<p><b>Categorize Component.</b> Select the relevant component, and click the button to specify the component's category. The Categorize Component dialog box opens where you can select one or more categories.</p> 
<b>Search</b>	Enter a string to display all the components whose name includes the string.
<b>Component</b>	The dialog box displays a list of the available default and customized components.

# The Breakdown View Component

The Breakdown View component enables the user to view the values of the KPI Breakdown for the KPI you select in the KPI View, Historical View, or Rolodex component in the same Dashboard page.

This component is created using Xcelsius.

The Breakdown View component is automatically wired to:

- The KPI View component is automatically wired to the Breakdown View component. For details, see ["The KPI View Component" on page 263](#).
- The Historical View component is automatically wired to the Breakdown View component. For details, see ["The Historical View Component" on page 233](#).
- The KPI Rolodex component is automatically wired to the Breakdown View component. For details, see ["The KPI Rolodex Component" on page 255](#).

## To access:

You can view the report in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** • ["Learn More" below](#) • ["Tasks" below](#) • ["UI Description" on page 216](#)

## Learn More

- A Breakdown View component displays only one KPI Breakdown. If you want to display more than one KPI Breakdown in the Dashboard page, you can create multiple Breakdown View components and rename each component.
- **Permissions.** In the Dashboard components and in their configuration dialog boxes, you can only see the Scorecards, Perspectives, Objectives, KPIs, or KPI Breakdowns for which you have permission. If you do not have permission, you do not see that element. If you do not have permission to see all the elements in a component, the error message **Data is not displayed because it does not exist or you do not have the correct viewing permissions. Contact your administrator** is displayed.

## Tasks

**Main task:** ["Dashboard Display" on page 185](#)

This section includes the following tasks:

["Point to the named instance when Executive Scorecard is installed on an SQL Server named instance" on the next page](#)

["Display a KPI Breakdown Values" below](#)

["Display the Breakdown Values of a KPI Breakdown" on the next page](#)

### **Point to the named instance when Executive Scorecard is installed on an SQL Server named instance**





When Executive Scorecard is installed on an SQL Server named instance, and if the SWF file was created by Xcelsius and is running on SAP BusinessObjects Enterprise content, the relevant universe (Context) connection must be updated to point to the <sql server name>\<named instance>.

To point to the named instance use the following steps:

1. Open the SAP BusinessObjects Enterprise Designer application on the SAP BusinessObjects Enterprise server.
2. Click **Tools > Connections** to display the connection list.
3. Select **XS\_DWH\_JDBC** and click **Edit**.
4. In the **Server** field enter <sql server name>\<named instance>:1433.
5. Click **Next** and then **Finish**.
6. Click **File > Export**, and then click **OK**.
7. Display the component in the Dashboard and see if data is displayed.

### **Display a KPI Breakdown Values**

To display a KPI Breakdown values in a component on a Dashboard page, proceed as follows:


1. Prerequisite: Make sure that the KPI has the relevant KPI Breakdowns. For details, see ["KPI Breakdowns" on page 160](#).
2. 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).
3. Add the Breakdown View component to the page. For details, see ["The Breakdown View Component" on the previous page](#)
4. Optionally, add the KPI View, Historical View, or KPI Rolodex component to the page. These components are automatically wired to the Breakdown View component.
5. In the Breakdown View component, select the chart display type   , **Top10** or **Bottom 10**, and the KPI Breakdown you want to display. For details, see ["Breakdown View Component" on the next page](#).

The component displays the required information.

6. Save the page.

### Display the Breakdown Values of a KPI Breakdown

To display the KPI Breakdown Values of a KPI Breakdown in a component on a Dashboard page, proceed as follows:

1. Prerequisite: Make sure that the KPI has the relevant KPI Breakdowns and that the KPI Breakdown has the relevant KPI Breakdowns. For details, see ["KPI Breakdowns" on page 160](#).
2. 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).
3. Add the Breakdown View component to the page. For details, see ["The Breakdown View Component" on page 214](#)
4. Add the Page Filter Component to the page. This component is automatically wired to the Breakdown View component. Select the relevant dimensions and values so that the relevant KPI Breakdown and its KPI Breakdowns appear in the component. For details, see ["The Page Filter Component" on page 275](#)
5. Optionally, add the KPI View, Historical View, or Rolodex component to the page. This component is automatically wired to the Breakdown View component. For details, see ["The KPI View Component" on page 263](#)
6. In the Breakdown View component, select the **Chart Type**, **Order**, and the KPI Breakdown you want to display in the **Breakdown List**. For details, see ["Breakdown View Component" below](#).

The component displays the required information.

7. Save the page.
8. When the information is displayed, use the Page Filter component to select the value of the relevant KPI Breakdown. The KPI Breakdowns of the selected KPI Breakdown are listed in the **Breakdown List**. Select the relevant KPI Breakdown to display its values.

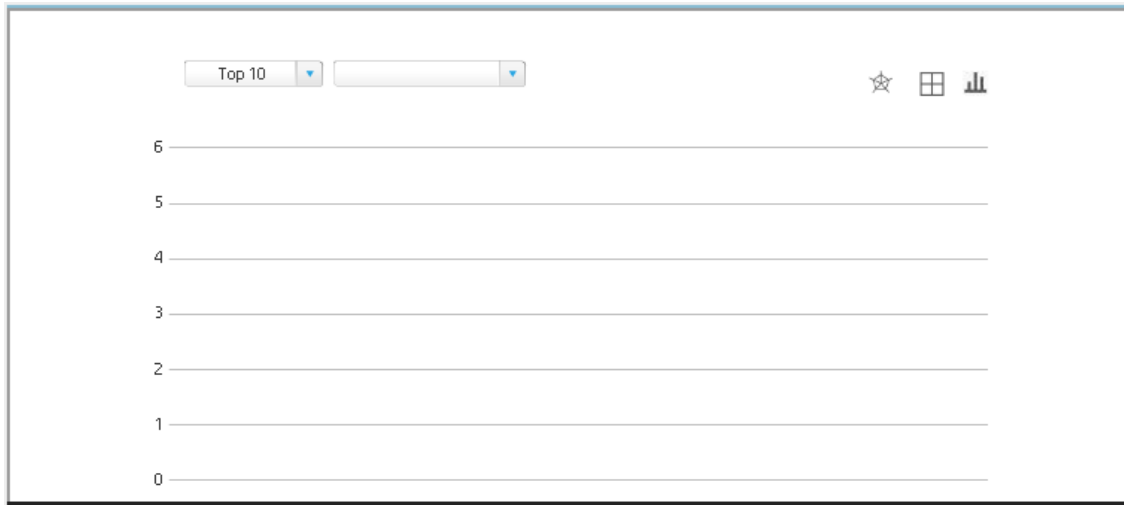
## UI Description

### Breakdown View Component

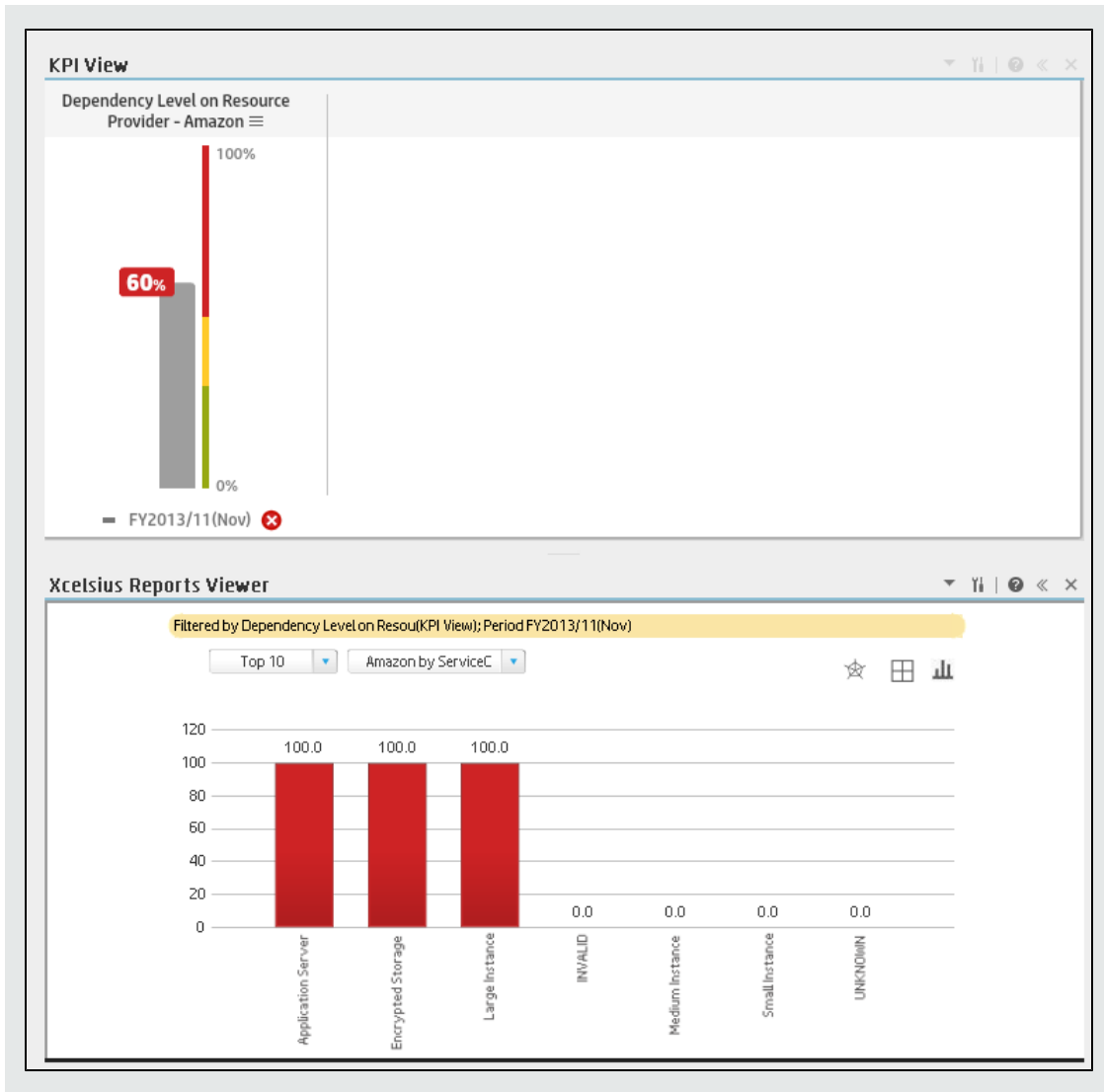
**Important:**

The Breakdown View component is automatically wired to the KPI View, Historical View, and KPI Rolodex component that appears on the same Dashboard page. This means, that when you select a KPI in the KPI View component, its KPI Breakdowns are listed in the Breakdown List and you can select to display the relevant one.
















**Example**




## Component Toolbar

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

UI Element	Description
	<p><b>Component Menu.</b> Opens a menu where you can select:</p> <ul style="list-style-type: none"> <li> <b>Preferences</b> <b>Preferences.</b> Depending on the component you are current configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>.</li> </ul>

UI Element	Description
	<ul style="list-style-type: none"> <li> <b>Wiring</b>. Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see "<a href="#">Wiring Between Components</a>" on page 338.</li> <li> <b>Refresh</b>. Refreshes the display. The button is disabled in the Page Filter component.</li> <li> <b>Open in a New Window</b>. Opens the component in a new window.</li> </ul>
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <a href="#">here</a> in <b>Click Here to configure</b> in the center of the component</p>
	Opens the online documentation page relevant to the component you are currently configuring.
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
	<b>Remove Component.</b> Removes the component from the page.

**Filter**

UI Element	Description
	Select Radar, Bar Chart or Table to format the report.
<b>Top 10 or Bottom</b>	Select to display the top 10 values or the bottom 10 values of the selected KPI Breakdown.

UI Element	Description
<b>&lt;Breakdown List&gt;</b>	<p>Select the KPI Breakdown you want to display.</p> <p><b>Note:</b> To display data in the Metric Breakdown report in an Xcelsius component or in a Metric Breakdown component, you must add the Historical Metric View component to the page . When you click the graph of a specific Metric in the Historical Metric View component, the list of its Metric Breakdowns is displayed in the Metric Breakdown report list. You can then display the relevant Metric Breakdown information.</p>

# The Historical Metric View Component

The Historical Metric View component displays the over time value and trend of the Metrics you selected in the Historical Metric View Component Filter.

You can also choose to view KPIs in the Historical Metric View component to displays the over time value and trend of these KPIs but their statuses and thresholds are not displayed.

## To access:

You can view the report in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" below](#) ● ["UI Description" on the next page](#)

## Learn More



- All the time periods used in the component are periods of the fiscal year (For example, the end of the fiscal year depends on the fiscal year you have set at the system level).
- **Permissions.** In the Dashboard components and in their configuration dialog boxes, you can only see the Scorecards, Perspectives, Objectives, KPIs, or KPI Breakdowns for which you have permission. If you do not have permission, you do not see that element. If you do not have permission to see all the elements in a component, the error message **Data is not displayed because it does not exist or you do not have the correct viewing permissions. Contact your administrator** is displayed.

## Tasks


**Main task:** ["Dashboard Display" on page 185](#)

### Add the Component to a Dashboard Page

To add a component to a page that is already formatted:

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

Note that double-click only works if you open the Component Gallery from the layout itself and not from the toolbar.

- 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 page. For user interface details, see "[Component Categories](#)" on [page 209](#).
  5. In the component, click the **Configure Component**  button or click **here** in **Click Here to configure** in the center of the component.
  6. In the component Filter dialog box that opens, select the information you want to display and click **OK**.

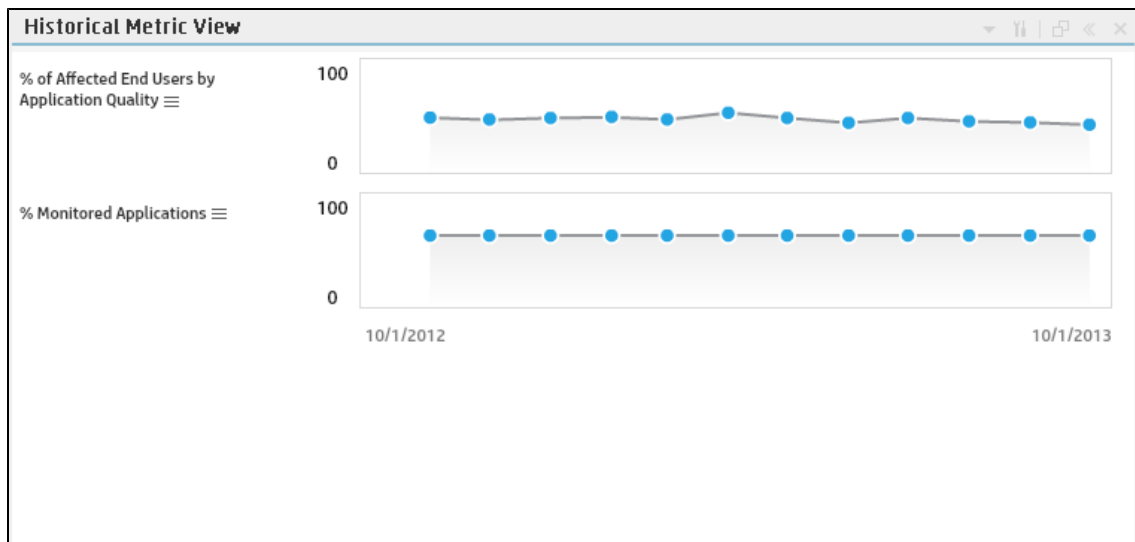
The component displays the required information.

For more information, see "[Page Layout and Components](#)" on [page 194](#).

## UI Description












### Historical Metric View Component (Display) Dialog Box

The component displays the over time value, trend, status of the KPIs or metrics you selected in the Historical Metric View Component Filter.



## Component Toolbar

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










UI Element	Description
	<p><b>Component Menu.</b> Opens a menu where you can select:</p> <ul style="list-style-type: none"> <li>  <b>Preferences</b> <b>Preferences.</b> Depending on the component you are current configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>.         </li> <li>  <b>Wiring</b> <b>Wiring.</b> Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see <a href="#">"Wiring Between Components" on page 338</a>.         </li> <li>  <b>Refresh</b> <b>Refresh.</b> Refreshes the display. The button is disabled in the Page Filter component.         </li> <li>  <b>Open in a New Window</b> <b>Open in a New Window.</b> Opens the component in a new window.         </li> </ul>
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <a href="#">here</a> in <b>Click Here to configure</b> in the center of the component</p>
	<p>Opens the online documentation page relevant to the component you are currently configuring.</p>
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>
	<p>Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.</p>
	<p><b>Remove Component.</b> Removes the component from the page.</p>


### Component Contents

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

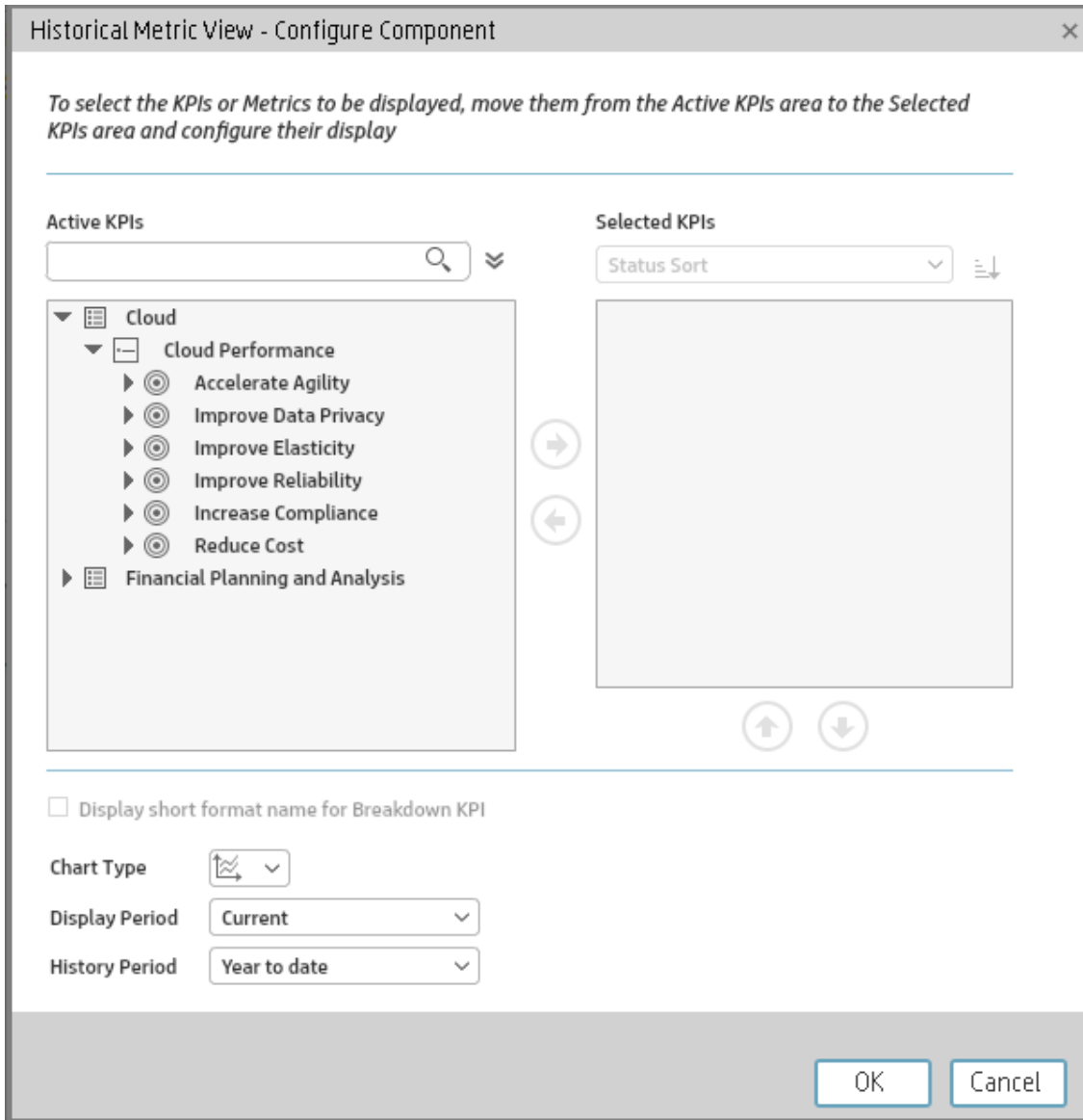
UI Element	Description
<Legend>	<p>The legend displays for each selected Metric:</p> <ul style="list-style-type: none"><li>• The color used to represent the KPI or Metric in the graph to enable you to recognize which line represents which KPI or Metric.</li><li>• The name of the Metric. Double-click the name to open the Explorer tab filtered for the selected element.</li><li>• ☰ (or *☰ when a new annotation has been added to the Metric. Move the cursor above the icon to display the Metric tooltip that provides detailed information about the Metric and access to the Explorer in the context of the Metric. For details, see <a href="#">"First Level Navigation (FLN) for an Objective, a KPI, or a Metric"</a> on page 365.</li></ul>




UI Element	Description																								
 	<p data-bbox="495 304 1104 331">Indicates that this Metric does not have an annotation.</p> <p data-bbox="495 357 1364 493">Indicates that this Metric has an annotation. When you move the mouse over such an icon, a tooltip displays the annotation information related to the Metric. For details, see <a href="#">"First Level Navigation (FLN) for an Objective, a KPI, or a Metric"</a> on page 365</p> <div data-bbox="495 514 1120 1333" style="border: 1px solid gray; padding: 5px;"> <div style="border-bottom: 1px solid gray; padding: 5px;"> <p><b>Number of Used Instances</b> <span style="float: right;">✕</span></p> <p>Owner not defined</p>  </div> <div style="padding: 5px;"> <p>11/16/2013 <span style="float: right;">11/18/2013</span></p> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20px;">▼</td> <td style="width: 15px;">📈</td> <td style="width: 40%;">Number of Used Instan...</td> <td style="width: 10%;">2#</td> <td style="width: 10%;">-</td> <td style="width: 5%;">✕</td> </tr> <tr> <td></td> <td>📈</td> <td>INVALID</td> <td>0#</td> <td>-</td> <td>✕</td> </tr> <tr> <td></td> <td>📈</td> <td>Other</td> <td>0#</td> <td>-</td> <td>✕</td> </tr> <tr> <td colspan="6">Show More...</td> </tr> </table> </div> <div style="border-top: 1px solid gray; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;">  <div style="text-align: center;"> <p>display2</p> <p>Hi everybody!</p> </div> <div style="text-align: right;"> <p>11/20/2013 12:10</p> </div> </div> </div> <div style="border-top: 1px solid gray; padding: 5px;"> <p style="margin: 0;"><a href="#">Explore...</a></p> <div style="display: flex; justify-content: space-around; align-items: center;">      </div> </div> </div>	▼	📈	Number of Used Instan...	2#	-	✕		📈	INVALID	0#	-	✕		📈	Other	0#	-	✕	Show More...					
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Show More...																									






UI Element	Description
	<p>Indicates a regular "point" corresponding to a division of the time period selected for the report.</p> <p>Double-click the "point" to display the KPI's detailed information in the Explorer tab up to the period of time defined by the "point" with the time range corresponding to the KPI range definition selected in the Explorer tab. For details, see <a href="#">"Explorer" on page 373</a>.</p> <div style="background-color: #f0f0f0; padding: 5px;"> <p><b>Note:</b> Click the line in the graph to display a vertical line that provides information about the value of the Metric.</p> </div>
<Y-axis>	<p>The Y-axis displays the values of the Metric in the relevant unit.</p> <ul style="list-style-type: none"> <li>• <b>When Metrics have the same unit:</b> <p>The Y-axis is displayed when all the selected Metrics have the same unit.</p> </li> <li>• <b>When Metrics do not have the same unit:</b> <p>The Y-axis is not displayed when the selected Metrics have different units.</p> <p>You can display the Y-axis by selecting a Metric in the legend. In that case, the Y-axis corresponding to the selected Metric.</p> </li> </ul>
<X-axis>	<p>The X-axis displays the time frame selected for the report, split into equal segments, depending on the Display Period. For details, see <a href="#">"Historical Metric View - Configure Component Filter Dialog Box" on the next page</a>.</p>



## Historical Metric View - Configure Component Filter Dialog Box





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

UI Element	Description
	<p>Enter the relevant string to display, in the tree, only the Metrics and the KPIs with a name that includes the string.</p> <p>In addition, the child Metrics of the filtered Metrics are also listed even when the child Metric names do not include the string.</p>

UI Element	Description
	<p><b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:</p> <ul style="list-style-type: none"> <li>• <b>Status:</b> Select one of the <b>All</b>, <b>Good</b>, <b>Warning</b>, <b>Critical</b>, or <b>No Data</b> values to display only the elements with the selected status, in the Active KPIs area. When you select <b>No Data</b>, the search returns only the elements with no data.</li> <li>• <b>Type:</b> Select: <ul style="list-style-type: none"> <li>▪ <b>All.</b> To display all the elements in the tree with the selected Status.</li> <li>▪ <b>KPI.</b> To display only the KPIs with the selected status.</li> <li>▪ <b>Metric.</b> To display a list of all the Metrics (the Status is changed to <b>All</b>). If you had selected a value in Status, and then you select <b>Metric</b>, then the Status field is changed to <b>All</b> and becomes inaccessible.</li> <li>▪ <b>Objective.</b> To display only the Objectives with the selected status, and their KPIs.</li> </ul> </li> </ul>
<p><b>Active KPIs</b></p>	<p>The left-side box lists all the active Scorecards, Perspectives, Objectives, KPIs, metrics, and KPI Breakdowns listed in the Active KPIs pane in the Studio. The KPIs and metrics are highlighted.</p> <p>To select or deselect the elements you want to display in the report, use the right and left arrows   to move the elements from the Available KPIs to the Selected KPIs and back. You can also double-click the element to move it from one box to the other.</p>
<p><b>Selected KPIs</b></p>	<p>The right-side box lists all the selected KPIs or metrics that you want to display in the component.</p> <p>To select or deselect the elements you want to display in the report, use the right and left arrows   to move the elements from the Available KPIs to the Selected KPIs and back. You can also double-click the element to move it from one box to the other.</p>

UI Element	Description								
<Status sort>	<p>Select :</p> <ul style="list-style-type: none"> <li>• <b>Alphabetical sort</b> to sort the selected elements in alphabetical order. You can then click the icon to the right of the box to select the reverse order. Depending on the selection, the icon can be one of the following: .</li> <li>• <b>Status sort</b> to sort the selected elements according to their status (for example: KPIs with the <b>Critical</b> status, followed by KPIs with a <b>Warning</b> status, and then KPIs with a <b>Good</b> status).</li> <li>• <b>Manual sort</b> to sort the selected elements manually using the  buttons. The buttons are available only when you select <b>Manual sort</b>.</li> </ul>								
<p><b>Display short format name for KPI Breakdown</b></p>	<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• You can select this option only when KPI/Metric Breakdowns have been defined and you have moved at least one of them to the Selected KPIs list.</li> <li>• The name of a KPI Breakdown can be long because it is composed of the name of the parent KPI followed by the names of the entity and dimension you selected when you created it.</li> </ul> <p>In the Dashboard components, this can cause problems because the complete name of the KPI Breakdown is not displayed.</p> <table border="1" data-bbox="451 1178 1385 1226"> <tr> <td>KPI with many breakdown results: 2005.0 ≡</td> <td>KPI with many breakdown results: 2006.0 ≡</td> <td>KPI with many breakdown results: 2007.0 ≡</td> <td>KPI with many breakdown results: 2008.0 ≡</td> </tr> </table> <p>To display, in the component, only the name of the entity and dimension instead of the complete name of the KPI Breakdown:</p> <ol style="list-style-type: none"> <li>1. Move the relevant KPI/Metric Breakdown to the Selected KPIs area. The <b>Display short format name for KPI Breakdown</b> option is enabled.</li> <li>2. Select the <b>Display short format name for KPI Breakdown</b> option and click <b>OK</b>.</li> </ol> <p>The component display shows the short names of the KPI/Metric Breakdowns. A tooltip displays the full name of the KPI Breakdowns.</p> <table border="1" data-bbox="451 1633 1385 1682"> <tr> <td>YearNumber: 2005.0 ≡</td> <td>YearNumber: 2006.0 ≡</td> <td>YearNumber: 2007.0 ≡</td> <td>YearNumber: 2008.0 ≡</td> </tr> </table> <p>For details on KPI Breakdowns, see <a href="#">"KPI Breakdowns" on page 160</a>.</p>	KPI with many breakdown results: 2005.0 ≡	KPI with many breakdown results: 2006.0 ≡	KPI with many breakdown results: 2007.0 ≡	KPI with many breakdown results: 2008.0 ≡	YearNumber: 2005.0 ≡	YearNumber: 2006.0 ≡	YearNumber: 2007.0 ≡	YearNumber: 2008.0 ≡
KPI with many breakdown results: 2005.0 ≡	KPI with many breakdown results: 2006.0 ≡	KPI with many breakdown results: 2007.0 ≡	KPI with many breakdown results: 2008.0 ≡						
YearNumber: 2005.0 ≡	YearNumber: 2006.0 ≡	YearNumber: 2007.0 ≡	YearNumber: 2008.0 ≡						

UI Element	Description
<p><b>Chart Type</b></p>	<p>You can select one of the following options:</p> <p> When you want to display the history of each selected KPI/Metric in a separate chart. This option is automatically selected when you select more than two KPIs/Metrics that do not have the same unit.</p> <p> When you want to display the history of all the selected KPIs/Metrics in one chart. These KPIs/Metrics must have the same unit. If two or more of the selected KPIs have different same units, this option is disabled. Click the relevant KPI to display its Y-axis.</p>
<p><b>Display Period</b></p>	<p>Select the time period to be displayed in the component:</p> <ul style="list-style-type: none"> <li>• <b>Current.</b> The values of the last calculations if the results were received during the current period. For KPIs/Metrics with incomplete calculations, the values from the previous period, depending on the time period selected in the <b>History Period</b> list.</li> <li>• <b>Last Closed.</b> The values of only the KPIs whose calculation period has completed for the time period selected in the <b>History Period</b> list.</li> <li>• <b>Yearly/Monthly/Quarterly/Weekly/Daily.</b> The list of time periods represents the longest periodicity configured for the selected metrics or KPIs. The longest periodicity corresponds to the shortest selectable periodicity on the list (for example, if the longest periodicity is Quarterly, then both Quarterly and Yearly become selectable). When you select <b>Yearly/Monthly/Quarterly/Weekly/Daily</b>, another field opens on the right. It lists only the years/months/quarters/weeks/days when the engine performed calculations. The values displayed in the pie chart are the values of the metrics or KPIs that have completed for the selected periods.</li> </ul>

UI Element	Description
<b>History Period</b>	<p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>• <b>Quarter to date.</b> The report's display period starts 3 months prior to the current date or prior to the selected year, month, quarter, week, or day in the <b>Display Period</b>.</li> <li>• <b>Half a year to date.</b> The report's display period starts 6 months prior to the current date or prior to the selected year, month, quarter, week, or day in the <b>Display Period</b>.</li> <li>• <b>Year to date.</b> The report's display period starts 1 year prior to the current date or prior to the selected year, month, quarter, week, or day in the <b>Display Period</b>.</li> <li>• <b>2 years to date.</b> The report's display period starts 2 years prior to the current date or prior to the selected year, month, quarter, week, or day in the <b>Display Period</b>.</li> <li>• <b>3 years to date.</b> The report's display period starts 3 years prior to the current date or prior to the selected year, month, quarter, week, or day in the <b>Display Period</b>.</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• The leftmost point on the X-axis (beginning of the report's time frame) corresponds to the first day of the History Period from the last date of the period selected in the <b>History Period</b> field.</li> </ul> <p><b>Example</b> If you select the 4th Quarter of 2013 in the <b>Display Period</b> field, and <b>3 years to date</b> in the <b>History Period</b> field, the rightmost point in the X-axis is the end of the 4th Quarter of 2013 (December 31st, 2013), and the leftmost point is the 4th Quarter of 2011.</p> <ul style="list-style-type: none"> <li>• Each point in the chart between the two end points represents the end of a Quarter between December 31st, 2010, and December 31st, 2013.</li> <li>• The rightmost point on the X-axis (end of the report's time frame) corresponds to the last day of the period selected in the <b>Display Period</b> field.</li> <li>• If you are displaying the Historical View component for only one KPI or metric and that element has no data at the beginning of the selected time frame, the leftmost point on the X-axis corresponds to the first day the element has data.</li> <li>• If the report includes more than one chart, the X-axis spans the whole</li> </ul>

UI Element	Description
	selected time frame.



# The Historical View Component

The Historical View component displays the over time value, trend, status, and threshold of the KPIs you selected in the Historical View - Configure Component dialog box.

The Historical View component is automatically wired to the Breakdown View component. For details, see ["The Breakdown View Component" on page 214](#).

## To access:

You can view the report in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" below](#) ● ["UI Description" on the next page](#)

## Learn More



- All the time periods used in the component are periods of the fiscal year (For example, the end of the fiscal year depends on the fiscal year you have set at the system level).
- **Permissions.** In the Dashboard components and in their configuration dialog boxes, you can only see the Scorecards, Perspectives, Objectives, KPIs, or KPI Breakdowns for which you have permission. If you do not have permission, you do not see that element. If you do not have permission to see all the elements in a component, the error message **Data is not displayed because it does not exist or you do not have the correct viewing permissions. Contact your administrator** is displayed.

## Tasks


**Main task:** ["Dashboard Display" on page 185](#)

### Add the Component to a Dashboard Page

To add a component to a page that is already formatted:

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

Note that double-click only works if you open the Component Gallery from the layout itself and not from the toolbar.

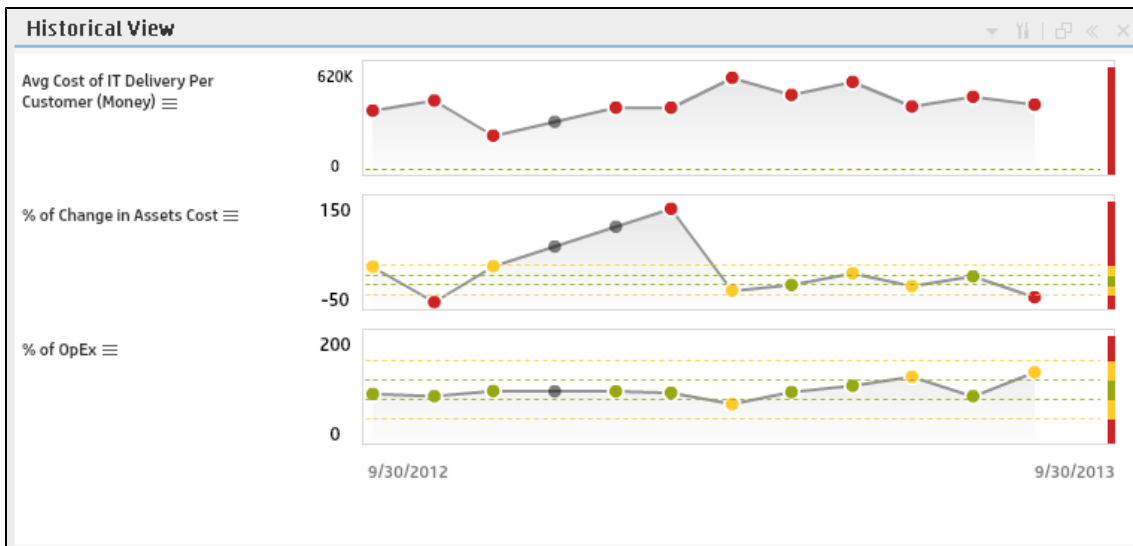
- If the target area is hidden by the Component Gallery dialog box, click the Component Gallery dialog box title bar and drag it to another location on your screen.
  - If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of the target area, and not to the part of the component that is colored white.
4. Close the Component Gallery page. For user interface details, see "[Component Categories](#)" on [page 209](#).
  5. In the component, click the **Configure Component**  button or click **here** in **Click Here to configure** in the center of the component.
  6. In the component Filter dialog box that opens, select the information you want to display and click **OK**.

The component displays the required information.

For more information, see "[Page Layout and Components](#)" on [page 194](#).


## UI Description











### Historical View Component



### Component Toolbar

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










UI Element	Description
	<b>Component Menu.</b> Opens a menu where you can select:




UI Element	Description
	<ul style="list-style-type: none"> <li>  <b>Preferences</b> <b>Preferences.</b> Depending on the component you are current configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>.         </li> <li>  <b>Wiring</b> <b>Wiring.</b> Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see <a href="#">"Wiring Between Components" on page 338</a>.         </li> <li>  <b>Refresh</b> <b>Refresh.</b> Refreshes the display. The button is disabled in the Page Filter component.         </li> <li>  <b>Open in a New Window</b> <b>Open in a New Window.</b> Opens the component in a new window.         </li> </ul>
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <a href="#">here</a> in <b>Click Here to configure</b> in the center of the component</p>
	<p>Opens the online documentation page relevant to the component you are currently configuring.</p>
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>
	<p>Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.</p>
	<p><b>Remove Component.</b> Removes the component from the page.</p>


### Component Contents


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

UI Element	Description
<Legend>	The legend displays for each selected KPI: <ul style="list-style-type: none"><li data-bbox="540 499 1117 531">• The color used to represent the KPI in the graph.</li><li data-bbox="540 562 1352 625">• The name of the KPI. Double-click the name to open the Explorer tab filtered for the selected element.</li></ul>

UI Element	Description																												
 	<p data-bbox="537 304 1122 331">Indicates that this KPI does not have an annotation.</p> <p data-bbox="537 357 1005 384">Indicates that this KPI has an annotation.</p> <p data-bbox="537 409 1331 508">When you move the mouse over such a point, a tooltip displays the annotation information related to the point. For details, see <a href="#">"First Level Navigation (FLN) for an Objective, a KPI, or a Metric"</a> on page 365</p> <div data-bbox="537 531 1166 1354" style="border: 1px solid gray; padding: 5px;"> <div style="border-bottom: 1px solid gray; padding-bottom: 5px;"> <p><b>Number of Used Instances</b> <span style="float: right;">✕</span></p> <p>Owner not defined</p>  </div> <div style="padding: 5px;"> <p>11/16/2013 <span style="float: right;">11/18/2013</span></p> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20px;">▼</td> <td style="width: 15px;">/</td> <td style="width: 15px;">\</td> <td style="width: 40%;">Number of Used Instan...</td> <td style="width: 10%;">2#</td> <td style="width: 10%; text-align: center;">-</td> <td style="width: 10%; text-align: center;">✕</td> </tr> <tr> <td></td> <td></td> <td></td> <td>INVALID</td> <td>0#</td> <td style="text-align: center;">-</td> <td style="text-align: center;">✕</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Other</td> <td>0#</td> <td style="text-align: center;">-</td> <td style="text-align: center;">✕</td> </tr> <tr> <td colspan="7">Show More...</td> </tr> </table> </div> <div style="border-top: 1px solid gray; padding-top: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;">  <div style="flex-grow: 1;"> <p>display2 <span style="float: right;">11/20/2013 12:10</span></p> <p>Hi everybody!</p> </div> </div> </div> <div style="border-top: 1px solid gray; padding-top: 5px; display: flex; justify-content: space-between; align-items: center;"> <span style="color: blue; text-decoration: underline;">Explore...</span>      </div> </div>	▼	/	\	Number of Used Instan...	2#	-	✕				INVALID	0#	-	✕				Other	0#	-	✕	Show More...						
▼	/	\	Number of Used Instan...	2#	-	✕																							
			INVALID	0#	-	✕																							
			Other	0#	-	✕																							
Show More...																													

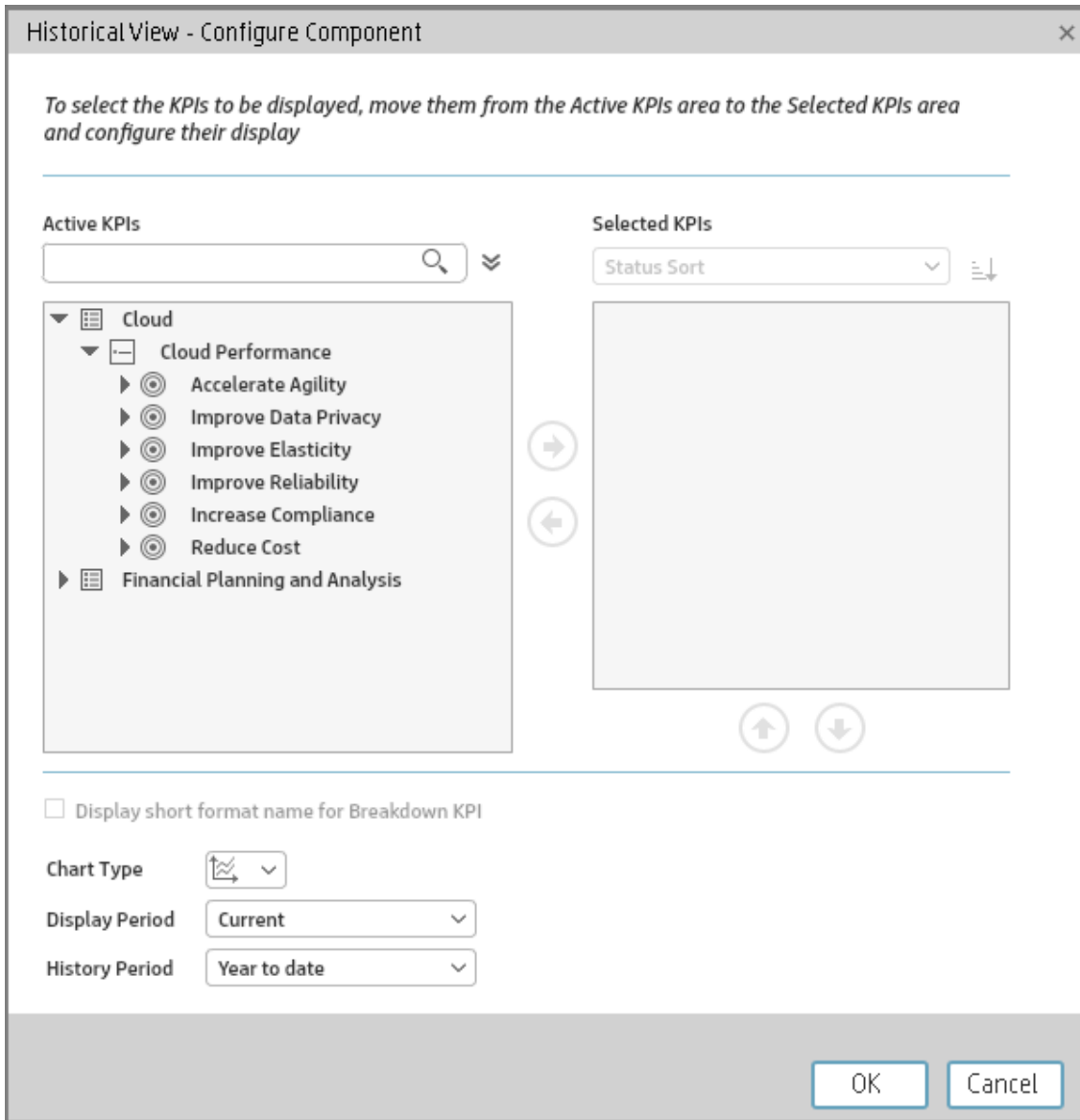
UI Element	Description
	<p>Indicates a point corresponding to a division of the time period selected for the report.</p> <p>The point has the color of the status (green: OK, yellow: warning, and red:critical).</p> <p>Double-click the "point" to display the KPI's detailed information in the Explorer tab up to the period of time defined by the "point" with the time range corresponding to the KPI range definition selected in the Explorer tab. For details, see <a href="#">"Explorer" on page 373</a>.</p> <div style="background-color: #f0f0f0; padding: 10px; border: 1px solid #ccc;"> <p><b>Note:</b> Click the line in the graph to display a vertical line that provides information about the value of the KPI.</p> </div>
<p>&lt;Threshold&gt;</p>	<p>The thresholds of the KPI are displayed on the right of the component.</p>  <p>For charts that display a single KPI, the threshold bar and the dotted line appear by default.</p> <p>For charts that display more than one KPI, select a KPI by either clicking the relevant line or the legend item, and the graph will display both the Y-axis and the threshold bar with the dotted line.</p> 

UI Element	Description
<Y-axis>	<p>The Y-axis displays the values of the KPI in the relevant unit and when you selected one chart (  ) when configuring the component:</p> <ul style="list-style-type: none"> <li> <b>When KPIs have the same unit:</b> <p>The Y-axis is displayed when all the selected KPIs have the same unit.</p> <div data-bbox="574 537 1130 1255" data-label="Figure"> </div> </li> <li> <b>When KPIs do not have the same unit:</b> <p>The Y-axis is not displayed when the selected KPIs have different units.</p> <div data-bbox="574 1453 1179 1743" data-label="Figure"> </div> </li> </ul> <p>You can display the Y-axis, by selecting a KPI in the legend. In that case, the Y-axis corresponding to the selected KPI and the thresholds</p>


UI Element	Description
	<p>are displayed in the component will appear together with the thresholds.</p>  <p>The chart, titled 'Historical View', displays two data series over time from 10/31/2012 to 8/31/2013. The Y-axis ranges from -50 to 150. The first series, 'Avg Cost of IT Delivery Per Customer (Money)', is represented by an orange line with circular markers. The second series, '% of Change in Assets Cost', is represented by a green line with circular markers. A shaded area highlights the region between the two lines. A vertical bar on the right side of the chart shows a color gradient from red at the top to green at the bottom. The legend in the top left corner identifies the two series and includes expand/collapse icons.</p>
<p><b>&lt;X-axis&gt;</b></p>	<p>The X-axis displays the time frame selected for the report, split into equal segments, depending on the Display Period. For details, see <a href="#">"Historical View - Configure Component Dialog Box"</a> on the next page.</p>














## Historical View - Configure Component Dialog Box



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

UI Element	Description
	<p>Enter the relevant string to display, in the tree, only the KPIs whose name includes the string.</p> <p>In addition, the child KPIs of the filtered KPIs are also listed even when the child KPIs names do not include the string.</p>

UI Element	Description
	<p><b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:</p> <ul style="list-style-type: none"> <li>• <b>Status:</b> Select one of the <b>All</b>, <b>Good</b>, <b>Warning</b>, <b>Critical</b>, or <b>No Data</b> values to display only the elements with the selected status, in the Active KPIs area. When you select <b>No Data</b>, the search returns only the elements with no data.</li> <li>• <b>Type:</b> Select: <ul style="list-style-type: none"> <li>▪ <b>All.</b> To display all the elements in the tree with the selected status.</li> <li>▪ <b>KPI.</b> To display only the KPIs with the selected status.</li> <li>▪ <b>Objective.</b> To display only the Objectives with the selected status, and their KPIs.</li> </ul> </li> </ul>
<p><b>Active KPIs</b></p>	<p>The left-side box lists all the active Scorecards, Perspectives, Objectives, and their KPIs, and KPI Breakdowns listed in the Active KPIs pane in the Studio. The KPIs and KPI Breakdowns are highlighted.</p> <p>To select or deselect the elements you want to display in the report, use the right and left arrows   to move the elements from the Available KPIs to the Selected KPIs and back. You can also double-click the element to move it from one box to the other.</p>
<p><b>Selected KPIs</b></p>	<p>The right-side box lists all the selected KPIs that you want to display in the component.</p> <p>To select or deselect the elements you want to display in the report, use the right and left arrows   to move the elements from the Available KPIs to the Selected KPIs and back. You can also double-click the element to move it from one box to the other.</p>
<p><b>&lt;Status sort&gt;</b></p>	<p>Select :</p> <ul style="list-style-type: none"> <li>• <b>Alphabetical sort</b> to sort the selected elements in alphabetical order. You can then click the icon to the right of the box to select the reverse order. Depending on the selection, the icon can be one of the following: .</li> <li>• <b>Status sort</b> to sort the selected elements according to their status (for example: KPIs with the <b>Critical</b> status, followed by KPIs with a <b>Warning</b> status, and then KPIs with a <b>Good</b> status).</li> <li>• <b>Manual sort</b> to sort the selected elements manually using the   buttons. The buttons are available only when you select <b>Manual sort</b>.</li> </ul>
	<p>Click to display the KPIs in ascending or descending alphabetical order.</p>

UI Element	Description								
<p><b>Display short format name for KPI Breakdown</b></p>	<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>You can select this option only when KPI/Metric Breakdowns have been defined and you have moved at least one of them to the Selected KPIs list.</li> <li>The name of a KPI Breakdown can be long because it is composed of the name of the parent KPI followed by the names of the entity and dimension you selected when you created it.</li> </ul> <p>In the Dashboard components, this can cause problems because the complete name of the KPI Breakdown is not displayed.</p> <table border="1" data-bbox="451 730 1385 783"> <tr> <td>KPI with many breakdown results: 2005.0 ≡</td> <td>KPI with many breakdown results: 2006.0 ≡</td> <td>KPI with many breakdown results: 2007.0 ≡</td> <td>KPI with many breakdown results: 2008.0 ≡</td> </tr> </table> <p>To display, in the component, only the name of the entity and dimension instead of the complete name of the KPI Breakdown:</p> <ol style="list-style-type: none"> <li>Move the relevant KPI/Metric Breakdown to the Selected KPIs area. The <b>Display short format name for KPI Breakdown</b> option is enabled.</li> <li>Select the <b>Display short format name for KPI Breakdown</b> option and click <b>OK</b>.</li> </ol> <p>The component display shows the short names of the KPI/Metric Breakdowns. A tooltip displays the full name of the KPI Breakdowns.</p> <table border="1" data-bbox="451 1192 1385 1245"> <tr> <td>YearNumber: 2005.0 ≡</td> <td>YearNumber: 2006.0 ≡</td> <td>YearNumber: 2007.0 ≡</td> <td>YearNumber: 2008.0 ≡</td> </tr> </table> <p>For details on KPI Breakdowns, see <a href="#">"KPI Breakdowns" on page 160</a>.</p>	KPI with many breakdown results: 2005.0 ≡	KPI with many breakdown results: 2006.0 ≡	KPI with many breakdown results: 2007.0 ≡	KPI with many breakdown results: 2008.0 ≡	YearNumber: 2005.0 ≡	YearNumber: 2006.0 ≡	YearNumber: 2007.0 ≡	YearNumber: 2008.0 ≡
KPI with many breakdown results: 2005.0 ≡	KPI with many breakdown results: 2006.0 ≡	KPI with many breakdown results: 2007.0 ≡	KPI with many breakdown results: 2008.0 ≡						
YearNumber: 2005.0 ≡	YearNumber: 2006.0 ≡	YearNumber: 2007.0 ≡	YearNumber: 2008.0 ≡						
<p><b>Chart Type</b></p>	<p>You can select one of the following options:</p> <p> Displays each KPI in its own chart. The display includes the legend, and the thresholds.</p> <p> Displays all KPIs in the same chart. This option is available only when all selected KPIs have the same unit, or only up to 2 KPIs with different units were selected. The char displays the KPIs, the legends, and the threshold lines.</p>								

UI Element	Description
<b>Display Period</b>	<p>Select the time period to be displayed in the component:</p> <ul style="list-style-type: none"><li>• <b>Current.</b> The values of the KPIs whose calculation period has completed as well as, for KPIs whose calculations are still proceeding, the values from the previous period, depending on the time period selected in the <b>History Period</b> list.</li><li>• <b>&lt;Longest_period&gt;.</b> Each KPI has its own period (as configured in the Configuration details tab in the Studio). When you move KPIs from the Available KPIs to the Selected KPIs area in the filter, the period that is the longest from all the selected KPIs periods is displayed as an additional option near the Display Period field.</li></ul> <p><b>Example</b> If one of the selected KPI period is <b>Weekly</b> and another is <b>Yearly</b>, the Display Period field lists: <b>Current, Yearly, and Last Closed.</b></p> <p>When you select the <b>&lt;Longest_period&gt;</b> another field opens on the right. It lists only the corresponding periods when KPI values, statuses, and scores were calculated by the engine.</p> <p><b>Example</b> If you select <b>Quarterly</b>, and the engine did not calculate the value of any KPI with the <b>Quarterly</b> period during the first and second quarters of 2008, these periods are not listed in the second field of the Display Period field. This list is independent from the selected KPIs.</p> <ul style="list-style-type: none"><li>• <b>Last Closed.</b> The values of only the KPIs whose calculation period has completed for the time period selected in the <b>History Period</b> list.</li></ul>

UI Element	Description
<b>History Period</b>	<p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>• <b>Quarter to date.</b> The report's display period starts 3 months prior to the current date or prior to the selected year, month, quarter, week, or day in the <b>Display Period</b>.</li> <li>• <b>Half a year to date.</b> The report's display period starts 6 months prior to the current date or prior to the selected year, month, quarter, week, or day in the <b>Display Period</b>.</li> <li>• <b>Year to date.</b> The report's display period starts 1 year prior to the current date or prior to the selected year, month, quarter, week, or day in the <b>Display Period</b>.</li> <li>• <b>2 years to date.</b> The report's display period starts 2 years prior to the current date or prior to the selected year, month, quarter, week, or day in the <b>Display Period</b>.</li> <li>• <b>3 years to date.</b> The report's display period starts 3 years prior to the current date or prior to the selected year, month, quarter, week, or day in the <b>Display Period</b>.</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• The leftmost point on the X-axis (beginning of the report's time frame) corresponds to the first day of the Overtime Period from the last date of the period selected in the <b>Display Period</b> field.</li> </ul> <p><b>Example</b> If you select the 4th Quarter of 2013 in the <b>Display Period</b> field, and <b>3 years to date</b> in the <b>History Period</b> field, the rightmost point in the X-axis is the end of the 4th Quarter of 2013 (December 31st, 2013), and the leftmost point is the last day of the 4th Quarter of 2010 (December 31st, 2010).</p> <ul style="list-style-type: none"> <li>• Each point in the chart between the two end points represents the end of a Quarter between December 31st, 2010, and December 31st, 2013.</li> <li>• The rightmost point on the X-axis (end of the report's time frame) corresponds to the last day of the period selected in the <b>Display Period</b> field.</li> <li>• If you are displaying the Historical View component for one KPI only and that KPI has no data at the beginning of the selected time frame, the leftmost point on the X-axis corresponds to the first day the KPI has data.</li> <li>• If the report includes more than one chart, the X-axis spans the whole</li> </ul>

UI Element	Description
	selected time frame.

# The KPI List Component

The KPI List component displays the list of selected KPIs and their value, trend, and status for the measurement period.

## To access:

You can view the report in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" below](#) ● ["UI Description" on the next page](#)

## Learn More



- All the time periods used in the component are periods of the fiscal year (For example, the end of the fiscal year depends on the fiscal year you have set at the system level).
- **Permissions.** In the Dashboard components and in their configuration dialog boxes, you can only see the Scorecards, Perspectives, Objectives, KPIs, or KPI Breakdowns for which you have permission. If you do not have permission, you do not see that element. If you do not have permission to see all the elements in a component, the error message **Data is not displayed because it does not exist or you do not have the correct viewing permissions. Contact your administrator** is displayed.

## Tasks

**Main task:** ["Dashboard Display" on page 185](#)


### Add the Component to a Dashboard Page

To add a component to a page that is already formatted:

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

Note that double-click only works if you open the Component Gallery from the layout itself and not from the toolbar.

- 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.

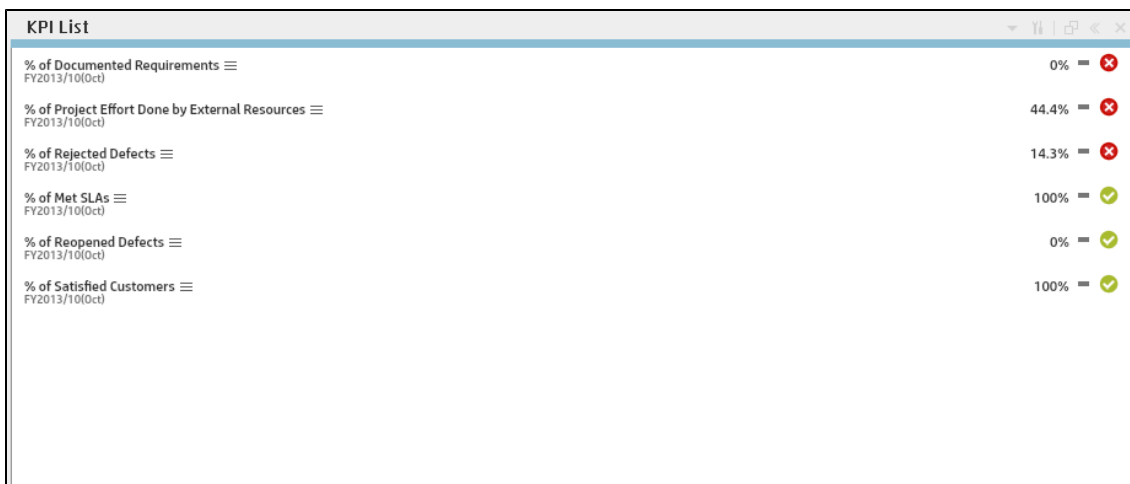
- If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of the target area, and not to the part of the component that is colored white.
- 4. Close the Component Gallery page. For user interface details, see ["Component Categories" on page 209](#).
- 5. In the component, click the **Configure Component**  button or click **here** in **Click Here to configure** in the center of the component.
- 6. In the component Filter dialog box that opens, select the information you want to display and click **OK**.

The component displays the required information.

For more information, see ["Page Layout and Components" on page 194](#).



## UI Description

### KPI List Component












### Component Toolbar

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

UI Element	Description
	<p><b>Component Menu.</b> Opens a menu where you can select:</p> <ul style="list-style-type: none"> <li>•  <b>Preferences</b> <b>Preferences.</b> Depending on the component you are current configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the</li> </ul>



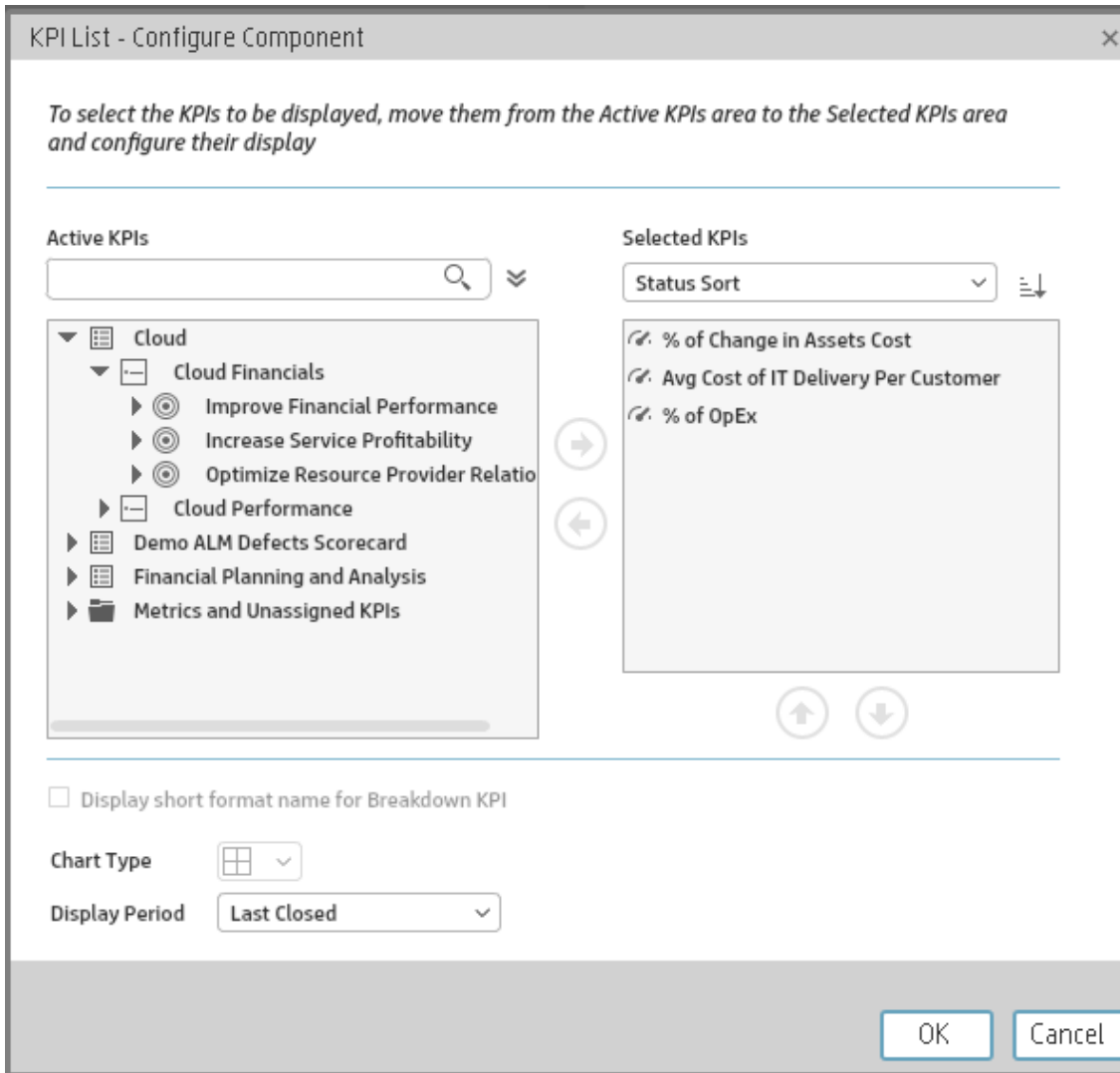
UI Element	Description
	<p>component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>.</p> <ul style="list-style-type: none"> <li data-bbox="544 409 1364 556">  <b>Wiring</b>. Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see "<a href="#">Wiring Between Components</a>" on page 338.         </li> <li data-bbox="544 598 1364 682">  <b>Refresh</b>. Refreshes the display. The button is disabled in the Page Filter component.         </li> <li data-bbox="544 724 1364 798">  <b>Open in a New Window</b>. Opens the component in a new window.         </li> </ul>
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <b>here</b> in <b>Click Here to configure</b> in the center of the component</p>
	<p>Opens the online documentation page relevant to the component you are currently configuring.</p>
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>
	<p>Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.</p>
	<p><b>Remove Component.</b> Removes the component from the page.</p>

### <Component Contents>

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






UI Element	Description
<p>&lt;Component contents&gt;</p>	<p>The following information is displayed for each KPI, from left to right:</p> <div data-bbox="472 495 1385 533" style="border: 1px solid black; padding: 2px; margin-bottom: 10px;"> <p>% of Project Effort Done by External Resources <span style="float: right;">44.4%  </span></p> <p><small>FY2013/10(Oct)</small></p> </div> <ul style="list-style-type: none"> <li>• The name of the KPI. Double-click the name to open the Explorer tab filtered for the selected element.</li> <li>•  (or  when a new annotation has been added to the KPI) Move the cursor above the icon to display the KPI tooltip that provides detailed information about the KPI and access to the Explorer in the context of the KPI. For details, see <a href="#">"First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 365</a>.</li> <li>• The value of the KPI.</li> <li>•  The trend icon indicates the trend of the KPI value calculated over the display period.</li> <li>• The current period or the last period depending on your selection in <b>Display Period</b> in the KPI List - Configure Component Dialog Box. For details, see <a href="#">"KPI List Component" on page 248</a>.</li> <li>• The status of the KPI during the display period. It can be:             <ul style="list-style-type: none"> <li>▪  indicates that the status is <b>Good</b>.</li> <li>▪  indicates that the status is <b>Warning</b>.</li> <li>▪  indicates that the status is <b>Error</b>.</li> <li>▪  indicates that the status is <b>No data</b>, meaning that the status was not calculated or that there was an error in the calculation.</li> </ul> </li> </ul> <div data-bbox="509 1486 1370 1562" style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> Move the mouse over the status icon to display the score.</p> </div>
<p>&lt;Tooltip&gt;</p>	<p>Move the mouse over the name of a KPI in the list to display a tooltip that include detailed information about the KPI. For details, see <a href="#">"First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 365</a>.</p>


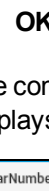

























## KPI List - Configure Component Dialog Box




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

UI Element	Description
<Search>	<p>Enter the relevant string to display, in the tree, only the KPIs whose name includes the string.</p> <p>In addition, the child KPIs of the filtered KPIs are also listed even when the child KPIs names do not include the string.</p>

UI Element	Description
	<p><b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:</p> <ul style="list-style-type: none"> <li>• <b>Status:</b> Select one of the <b>All</b>, <b>Good</b>, <b>Warning</b>, <b>Critical</b>, or <b>No Data</b> values to display only the elements with the selected status, in the Active KPIs area. When you select <b>No Data</b>, the search returns only the elements with no data.</li> <li>• <b>Type:</b> Select: <ul style="list-style-type: none"> <li>▪ <b>All.</b> To display all the elements in the tree with the selected Status.</li> <li>▪ <b>KPI.</b> To display only the KPIs with the selected status.</li> <li>▪ <b>Metric.</b> To display a list of all the Metrics (the Status is changed to <b>All</b>). If you had selected a value in Status, and then you select <b>Metric</b>, then the Status field is changed to <b>All</b> and becomes inaccessible.</li> <li>▪ <b>Objective.</b> To display only the Objectives with the selected status, and their KPIs.</li> </ul> </li> </ul>
<p><b>Active KPIs</b></p>	<p>The left-side box lists all the active Scorecards, Perspectives, Objectives, and their KPIs, and KPI Breakdowns listed in the Active KPIs pane in the Studio. The KPIs are highlighted.</p> <p>To select or deselect the elements you want to display in the report, use the right and left arrows   to move the elements from the Available KPIs to the Selected KPIs and back. You can also double-click the element to move it from one box to the other.</p>
<p><b>Selected KPIs</b></p>	<p>The right-side box lists all the selected KPIs that you want to display in the component.</p> <p>To select or deselect the elements you want to display in the report, use the right and left arrows   to move the elements from the Available KPIs to the Selected KPIs and back. You can also double-click the element to move it from one box to the other.</p>

UI Element	Description								
<Status sort>	<p>Select :</p> <ul style="list-style-type: none"> <li>• <b>Alphabetical sort</b> to sort the selected elements in alphabetical order. You can then click the icon to the right of the box to select the reverse order. Depending on the selection, the icon can be one of the following: .</li> <li>• <b>Status sort</b> to sort the selected elements according to their status (for example: KPIs with the <b>Critical</b> status, followed by KPIs with a <b>Warning</b> status, and then KPIs with a <b>Good</b> status).</li> <li>• <b>Manual sort</b> to sort the selected elements manually using the  buttons. The buttons are available only when you select <b>Manual sort</b>.</li> </ul>								
	Click to display the KPIs in ascending or descending alphabetical order.								
<p><b>Display short format name for KPI Breakdown</b></p>	<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• You can select this option only when KPI Breakdowns have been defined and you have moved at least one of them to the Selected KPIs list.</li> <li>• The name of a KPI Breakdown can be long because it is composed of the name of the parent KPI followed by the names of the entity and dimension you selected when you created it.</li> </ul> <p>In the Dashboard components, this can cause problems because the complete name of the KPI Breakdown is not displayed.</p> <table border="1" data-bbox="954 583 990 1791"> <tr> <td>KPI with many breakdown results: 2005.0 </td> <td>KPI with many breakdown results: 2006.0 </td> <td>KPI with many breakdown results: 2007.0 </td> <td>KPI with many breakdown results: 2008.0 </td> </tr> </table> <p>To display, in the component, only the name of the entity and dimension instead of the complete name of the KPI Breakdown:</p> <ol style="list-style-type: none"> <li>1. Move the relevant KPI Breakdown to the Selected KPIs area. The <b>Display short format name for KPI Breakdown</b> option is enabled.</li> <li>2. Select the <b>Display short format name for KPI Breakdown</b> option and click <b>OK</b>.</li> </ol> <p>The component display shows the short names of the KPI Breakdowns. A tooltip displays the full name of the KPI Breakdowns.</p> <table border="1" data-bbox="1307 583 1343 1791"> <tr> <td>YearNumber: 2005.0 </td> <td>YearNumber: 2006.0 </td> <td>YearNumber: 2007.0 </td> <td>YearNumber: 2008.0 </td> </tr> </table> <p>For details on KPI Breakdowns, see <a href="#">"KPI Breakdowns" on page 160</a>.</p>	KPI with many breakdown results: 2005.0 	KPI with many breakdown results: 2006.0 	KPI with many breakdown results: 2007.0 	KPI with many breakdown results: 2008.0 	YearNumber: 2005.0 	YearNumber: 2006.0 	YearNumber: 2007.0 	YearNumber: 2008.0 
KPI with many breakdown results: 2005.0 	KPI with many breakdown results: 2006.0 	KPI with many breakdown results: 2007.0 	KPI with many breakdown results: 2008.0 						
YearNumber: 2005.0 	YearNumber: 2006.0 	YearNumber: 2007.0 	YearNumber: 2008.0 						

UI Element	Description												
<p><b>Chart Type</b></p>	<p>One option is available</p> <ul style="list-style-type: none"> <li>  <b>List.</b> The display is list of selected KPIs with their data, as follows:           <div data-bbox="483 436 1089 695" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>KPI List</b></p> <table border="1"> <tbody> <tr> <td>% of Documented Requirements</td> <td>0%</td> </tr> <tr> <td>% of Project Effort Done by External Resources</td> <td>44.4%</td> </tr> <tr> <td>% of Rejected Defects</td> <td>14.3%</td> </tr> <tr> <td>% of Met SLAs</td> <td>100%</td> </tr> <tr> <td>% of Reopened Defects</td> <td>0%</td> </tr> <tr> <td>% of Satisfied Customers</td> <td>100%</td> </tr> </tbody> </table> </div> </li> </ul>	% of Documented Requirements	0%	% of Project Effort Done by External Resources	44.4%	% of Rejected Defects	14.3%	% of Met SLAs	100%	% of Reopened Defects	0%	% of Satisfied Customers	100%
% of Documented Requirements	0%												
% of Project Effort Done by External Resources	44.4%												
% of Rejected Defects	14.3%												
% of Met SLAs	100%												
% of Reopened Defects	0%												
% of Satisfied Customers	100%												
<p><b>Display Period</b></p>	<p>Select the time period to be displayed in the component:</p> <ul style="list-style-type: none"> <li> <b>Current.</b> The values of the KPIs whose calculation period has completed as well as, for KPIs whose calculations are still proceeding, the values from the previous period.         </li> <li> <b>&lt;Longest_period&gt;.</b> Each KPI has its own period (as configured in the Configuration details tab in the Studio). When you move KPIs from the Available KPIs to the Selected KPIs area in the filter, the longest period for all the selected KPIs is displayed as an additional option near the Display Period field. For example if one of the selected KPI's period is <b>Weekly</b> and another is <b>Yearly</b>, the Display Period field lists: <b>Current, Yearly, and Last Closed</b>.           <p>When you select the <b>&lt;Longest_period&gt;</b> another field opens on the right. It lists only the corresponding periods when the engine performed calculations. For example, if you select <b>Quarterly</b>, and the engine did not calculate the value of any KPI with the <b>Quarterly</b> period during the first and second quarters of 2008, these periods are not listed in the second field of the Display Period field.</p> </li> <li> <b>Last Closed.</b> The values of only the KPIs whose calculation period has completed.         </li> </ul>												

# The KPI Rolodex Component

The KPI Rolodex component displays the selected KPIs and their value, trend, and status for the measurement period in gauge format.

The KPI Rolodex component is automatically wired to the Breakdown View component. For details, see "[The Breakdown View Component](#)" on page 214.

## To access:

You can view the report in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** ● "[Learn More](#)" below ● "[Tasks](#)" below ● "[UI Description](#)" on the next page

## Learn More



- All the time periods used in the component are periods of the fiscal year (For example, the end of the fiscal year depends on the fiscal year you have set at the system level).
- **Permissions.** In the Dashboard components and in their configuration dialog boxes, you can only see the Scorecards, Perspectives, Objectives, KPIs, or KPI Breakdowns for which you have permission. If you do not have permission, you do not see that element. If you do not have permission to see all the elements in a component, the error message **Data is not displayed because it does not exist or you do not have the correct viewing permissions. Contact your administrator** is displayed.

## Tasks


**Main task:** "[Dashboard Display](#)" on page 185

### Add the Component to a Dashboard Page

To add a component to a page that is already formatted:

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

Note that double-click only works if you open the Component Gallery from the layout itself and not from the toolbar.

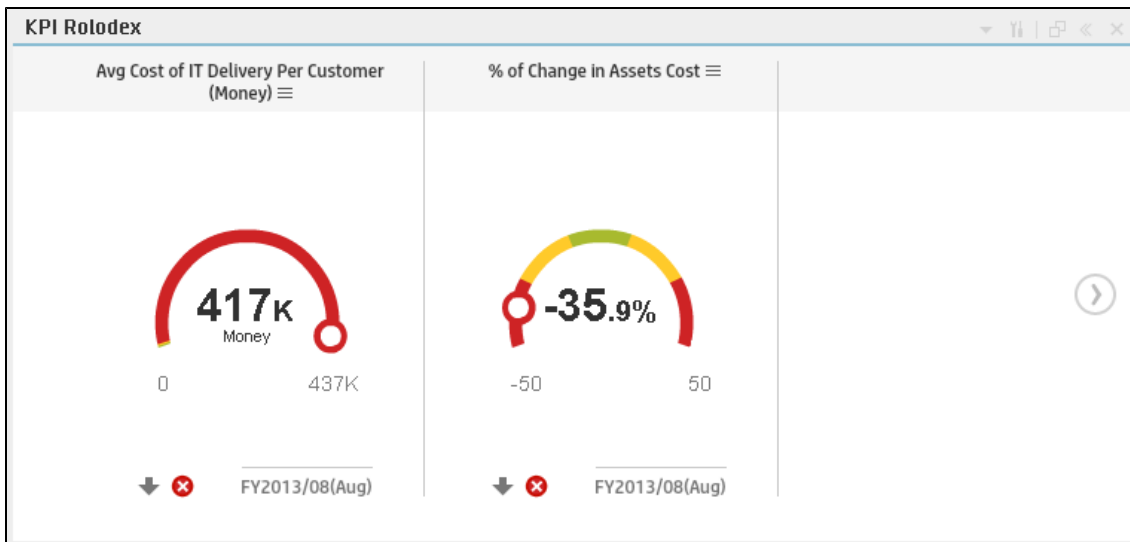
- If the target area is hidden by the Component Gallery dialog box, click the Component Gallery dialog box title bar and drag it to another location on your screen.
  - If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of the target area, and not to the part of the component that is colored white.
4. Close the Component Gallery page. For user interface details, see "[Component Categories](#)" on [page 209](#).
  5. In the component, click the **Configure Component**  button or click **here** in **Click Here to configure** in the center of the component.
  6. In the component Filter dialog box that opens, select the information you want to display and click **OK**.

The component displays the required information.

For more information, see "[Page Layout and Components](#)" on [page 194](#).


## UI Description

### KPI Rolodex Component













### Component Toolbar

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

UI Element	Description
	<b>Component Menu.</b> Opens a menu where you can select:













UI Element	Description
	<ul style="list-style-type: none"> <li data-bbox="540 310 1383 499">  <b>Preferences</b> <b>Preferences.</b> Depending on the component you are current configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>.         </li> <li data-bbox="540 531 1383 678">  <b>Wiring</b> <b>Wiring.</b> Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see <a href="#">"Wiring Between Components" on page 338</a>.         </li> <li data-bbox="540 709 1383 804">  <b>Refresh</b> <b>Refresh.</b> Refreshes the display. The button is disabled in the Page Filter component.         </li> <li data-bbox="540 835 1383 919">  <b>Open in a New Window</b> <b>Open in a New Window.</b> Opens the component in a new window.         </li> </ul>
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <a href="#">here</a> in <b>Click Here to configure</b> in the center of the component</p>
	<p>Opens the online documentation page relevant to the component you are currently configuring.</p>
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>
	<p>Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.</p>
	<p><b>Remove Component.</b> Removes the component from the page.</p>

**<Component Contents>**

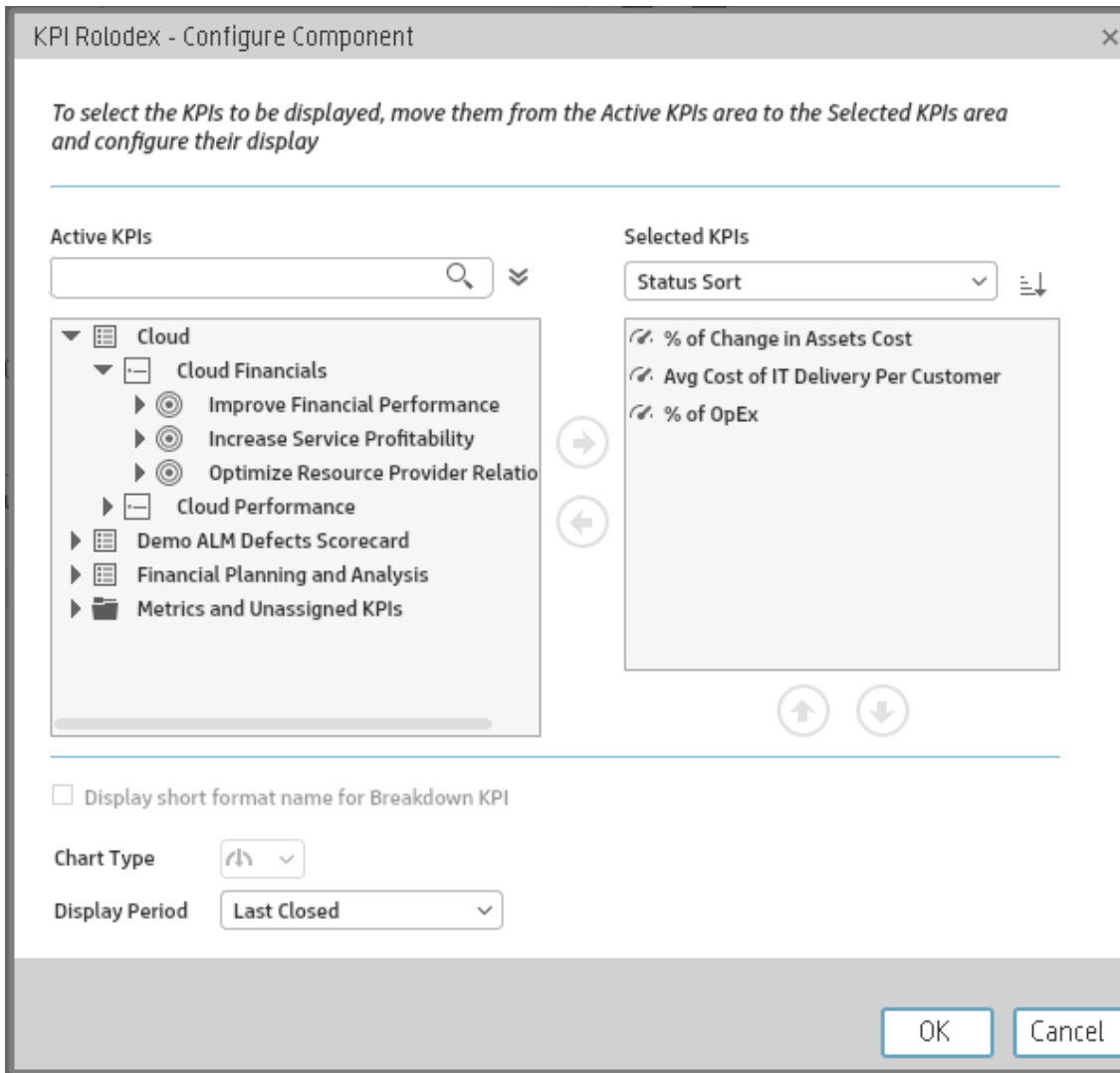
The component displays a gauge for each selected KPI. The order of the gauges in the component, correspond to the order of the KPIs in the Selected KPIs area in the KPI Rolodex - Configure Component dialog box. For details, see ["KPI Rolodex - Configure Component Dialog Box" on page 259](#).

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







UI Element	Description
<p><b>&lt;Component contents&gt;</b></p>	<p>The component displays the following information:</p> <ul style="list-style-type: none"> <li>• The name of the KPI above the gauge. Double-click the name to open the Explorer tab filtered for the selected element.</li> <li>•  (or  when a new annotation has been added to the KPI) Move the cursor above the icon to display the KPI tooltip that provides detailed information about the KPI and access to the Explorer in the context of the KPI. For details, see <a href="#">"First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 365</a>.</li> <li>• The value (to the right of the gauge) represent the highest threshold value. The value (to the left of the gauge) represent the lowest threshold value. The value in the center of the gauge displays the value of the KPI with its unit. The color of the circle corresponds to the KPI status.</li> <li>• The colors of the small bars represent the thresholds defined for the KPI.</li> <li>• The circle indicates the KPI value.</li> <li>• The text at the bottom of the gauge indicates the display period of the KPI.</li> <li>• The icon to the left of the display period indicates the trend  calculated over the display period.</li> <li>• The icon to the left of the display period indicates the status of the KPI during the display period: <ul style="list-style-type: none"> <li>▪  indicates that the status is <b>Good</b>.</li> <li>▪  indicates that the status is <b>Warning</b>.</li> <li>▪  indicates that the status is <b>Error</b>.</li> <li>▪  indicates that status was not calculated or that there was an error in the calculation.</li> <li>▪   is shown at the bottom of the gauge when there is no calculated data for the selected item for the selected period. This can be due to an incorrect formula (for example: division by zero), an arithmetic error due to missing data, or other reasons.</li> </ul> </li> </ul> <p>Double-click the problematic point to open the Explorer page where a short description of the reason why there is no data for that point, is displayed at</p>


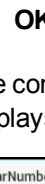

























UI Element	Description
	the top of the page.
<Tooltip>	Move the mouse over the name of a KPI to display a tooltip that include additional information about the KPI. For details, see <a href="#">"First Level Navigation (FLN) for an Objective, a KPI, or a Metric"</a> on page 365.
	Use the arrows to scroll between the "pages" of gauges. The width of the "page" or the number of gauges displayed on a "page" depend on the width of the component in the Dashboard.  When you get to the leftmost page, the left arrow disappears. When you get to the rightmost page, the right arrow disappears.


### KPI Rolodex - Configure Component Dialog Box



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

UI Element	Description
	<p>Enter the relevant string to display, in the tree, only the KPIs whose name includes the string.</p> <p>In addition, the child KPIs of the filtered KPIs are also listed even when the child KPIs names do not include the string.</p>
	<p><b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:</p> <ul style="list-style-type: none"> <li>• <b>Status:</b> Select one of the <b>All</b>, <b>Good</b>, <b>Warning</b>, <b>Critical</b>, or <b>No Data</b> values to display only the elements with the selected status, in the Active KPIs area. When you select <b>No Data</b>, the search returns only the elements with no data.</li> <li>• <b>Type:</b> Select either <b>KPIs</b> or <b>Objectives</b> to display: <ul style="list-style-type: none"> <li>▪ Only the KPIs with the selected status.</li> <li>▪ The Objectives and those of their KPIs that have the selected status.</li> </ul> </li> </ul>
<p><b>Active KPIs</b></p>	<p>The left-side box lists all the active Scorecards, Perspectives, Objectives, and their KPIs, and KPI Breakdowns listed in the Active KPIs pane in the Studio. The KPIs are highlighted.</p> <p>To select or deselect the elements you want to display in the report, use the right and left arrows   to move the elements from the Available KPIs to the Selected KPIs and back. You can also double-click the element to move it from one box to the other.</p>
<p><b>Selected KPIs</b></p>	<p>The right-side box lists all the selected KPIs that you want to display in the KPI Overtime report.</p> <p>To select or deselect the elements you want to display in the report, use the right and left arrows   to move the elements from the Available KPIs to the Selected KPIs and back. You can also double-click the element to move it from one box to the other.</p>

UI Element	Description								
<Status sort>	<p>Select :</p> <ul style="list-style-type: none"> <li>• <b>Alphabetical sort</b> to sort the selected elements in alphabetical order. You can then click the icon to the right of the box to select the reverse order. Depending on the selection, the icon can be one of the following: .</li> <li>• <b>Status sort</b> to sort the selected elements according to their status (for example: KPIs with the <b>Critical</b> status, followed by KPIs with a <b>Warning</b> status, and then KPIs with a <b>Good</b> status).</li> <li>• <b>Manual sort</b> to sort the selected elements manually using the  buttons. The buttons are available only when you select <b>Manual sort</b>.</li> </ul>								
	Click to display the KPIs in ascending or descending alphabetical order.								
<b>Display short format name for KPI Breakdown</b>	<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• You can select this option only when KPI Breakdowns have been defined and you have moved at least one of them to the Selected KPIs list.</li> <li>• The name of a KPI Breakdown can be long because it is composed of the name of the parent KPI followed by the names of the entity and dimension you selected when you created it.</li> </ul> <p>In the Dashboard components, this can cause problems because the complete name of the KPI Breakdown is not displayed.</p> <table border="1" data-bbox="451 1234 1385 1283"> <tr> <td>KPI with many breakdown results: 2005.0 </td> <td>KPI with many breakdown results: 2006.0 </td> <td>KPI with many breakdown results: 2007.0 </td> <td>KPI with many breakdown results: 2008.0 </td> </tr> </table> <p>To display, in the component, only the name of the entity and dimension instead of the complete name of the KPI Breakdown:</p> <ol style="list-style-type: none"> <li>1. Move the relevant KPI Breakdown to the Selected KPIs area. The <b>Display short format name for KPI Breakdown</b> option is enabled.</li> <li>2. Select the <b>Display short format name for KPI Breakdown</b> option and click <b>OK</b>.</li> </ol> <p>The component display shows the short names of the KPI Breakdowns. A tooltip displays the full name of the KPI Breakdowns.</p> <table border="1" data-bbox="451 1692 1385 1740"> <tr> <td>YearNumber: 2005.0 </td> <td>YearNumber: 2006.0 </td> <td>YearNumber: 2007.0 </td> <td>YearNumber: 2008.0 </td> </tr> </table> <p>For details on KPI Breakdowns, see <a href="#">"KPI Breakdowns" on page 160</a>.</p>	KPI with many breakdown results: 2005.0 	KPI with many breakdown results: 2006.0 	KPI with many breakdown results: 2007.0 	KPI with many breakdown results: 2008.0 	YearNumber: 2005.0 	YearNumber: 2006.0 	YearNumber: 2007.0 	YearNumber: 2008.0 
KPI with many breakdown results: 2005.0 	KPI with many breakdown results: 2006.0 	KPI with many breakdown results: 2007.0 	KPI with many breakdown results: 2008.0 						
YearNumber: 2005.0 	YearNumber: 2006.0 	YearNumber: 2007.0 	YearNumber: 2008.0 						

UI Element	Description
<b>Chart Type</b>	 <b>Gauge.</b> The display is a set of gauges, laid out horizontally.
<b>Display Period</b>	<p>Select the time period to be displayed in the component:</p> <ul style="list-style-type: none"> <li>• <b>Current.</b> The values of the KPIs whose calculation period has completed as well as, for KPIs whose calculations are still proceeding, the values from the previous period.</li> <li>• <b>&lt;Longest_period&gt;.</b> Each KPI has its own period (as configured in the Configuration details tab in the Studio). When you move KPIs from the Available KPIs to the Selected KPIs area in the filter, the longest period for all the selected KPIs is displayed as an additional option near the Display Period field. For example if one of the selected KPI's period is <b>Weekly</b> and another is <b>Yearly</b>, the Display Period field lists: <b>Current, Yearly, and Last Closed</b>.</li> </ul> <p>When you select the <b>&lt;Longest_period&gt;</b> another field opens on the right. It lists only the corresponding periods when the engine performed calculations. For example, if you select <b>Quarterly</b>, and the engine did not calculate the value of any KPI with the <b>Quarterly</b> period during the first and second quarters of 2008, these periods are not listed in the second field of the Display Period field.</p> <ul style="list-style-type: none"> <li>• <b>Last Closed.</b> The values of only the KPIs whose calculation period has completed.</li> </ul>

# The KPI View Component

The KPI View component displays the list of selected KPIs and their value, trend, and status for the measurement period in horizontal or vertical bar or gauge format.

The KPI View component is automatically wired to the Breakdown View component. For details, see "[The Breakdown View Component](#)" on page 214.

## To access:

You can view the report in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** ● "[Learn More](#)" below ● "[Tasks](#)" below ● "[UI Description](#)" on the next page

## Learn More



- All the time periods used in the component are periods of the fiscal year (For example, the end of the fiscal year depends on the fiscal year you have set at the system level).
- **Permissions.** In the Dashboard components and in their configuration dialog boxes, you can only see the Scorecards, Perspectives, Objectives, KPIs, or KPI Breakdowns for which you have permission. If you do not have permission, you do not see that element. If you do not have permission to see all the elements in a component, the error message **Data is not displayed because it does not exist or you do not have the correct viewing permissions. Contact your administrator** is displayed.

## Tasks


**Main task:** "[Dashboard Display](#)" on page 185

### Add the Component to a Dashboard Page

To add a component to a page that is already formatted:

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

Note that double-click only works if you open the Component Gallery from the layout itself and not from the toolbar.

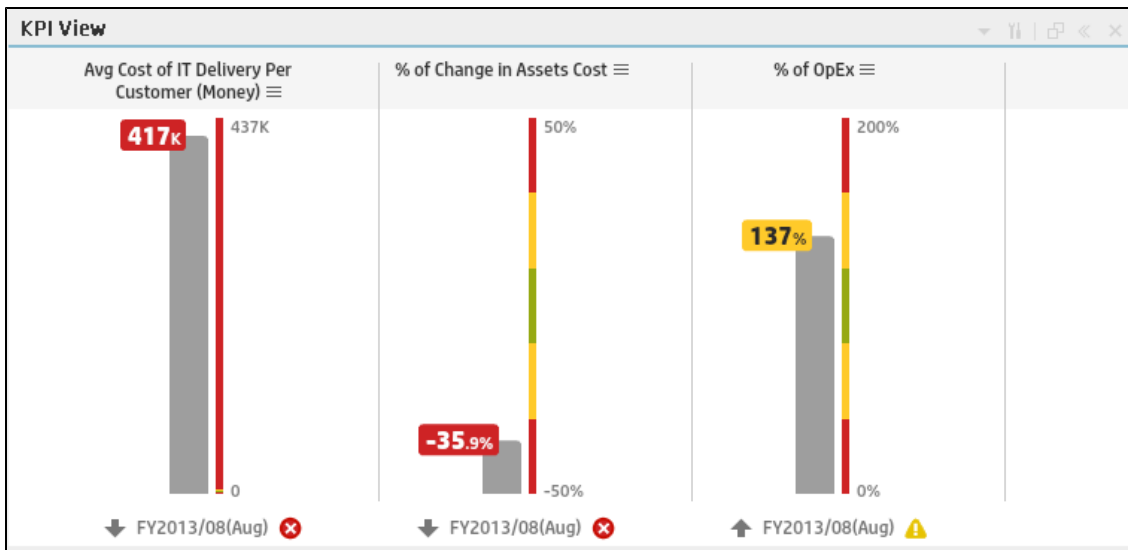
- If the target area is hidden by the Component Gallery dialog box, click the Component Gallery dialog box title bar and drag it to another location on your screen.
  - If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of the target area, and not to the part of the component that is colored white.
4. Close the Component Gallery page. For user interface details, see ["Component Categories" on page 209](#).
  5. In the component, click the **Configure Component**  button or click **here** in **Click Here to configure** in the center of the component.
  6. In the component Filter dialog box that opens, select the information you want to display and click **OK**.

The component displays the required information.

For more information, see ["Page Layout and Components" on page 194](#).

## UI Description

### KPI View Component














**Note:** This component is wired, by default, with the Page Filter component. For details, see ["The Page Filter Component" on page 275](#).



## Component Toolbar

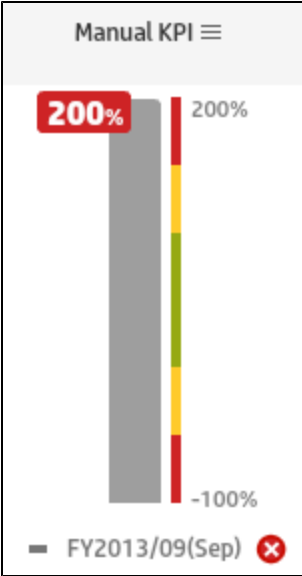
User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets>):

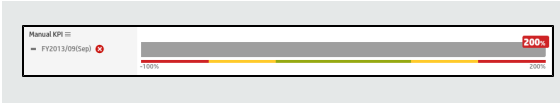





UI Element	Description
	<p><b>Component Menu.</b> Opens a menu where you can select:</p> <ul style="list-style-type: none"> <li>  <b>Preferences</b> <b>Preferences.</b> Depending on the component you are currently configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>.         </li> <li>  <b>Wiring</b> <b>Wiring.</b> Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see <a href="#">"Wiring Between Components" on page 338</a>.         </li> <li>  <b>Refresh</b> <b>Refresh.</b> Refreshes the display. The button is disabled in the Page Filter component.         </li> <li>  <b>Open in a New Window</b> <b>Open in a New Window.</b> Opens the component in a new window.         </li> </ul>
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <a href="#">here</a> in <b>Click Here to configure</b> in the center of the component</p>
	<p>Opens the online documentation page relevant to the component you are currently configuring.</p>
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>
	<p>Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.</p>
	<p><b>Remove Component.</b> Removes the component from the page.</p>

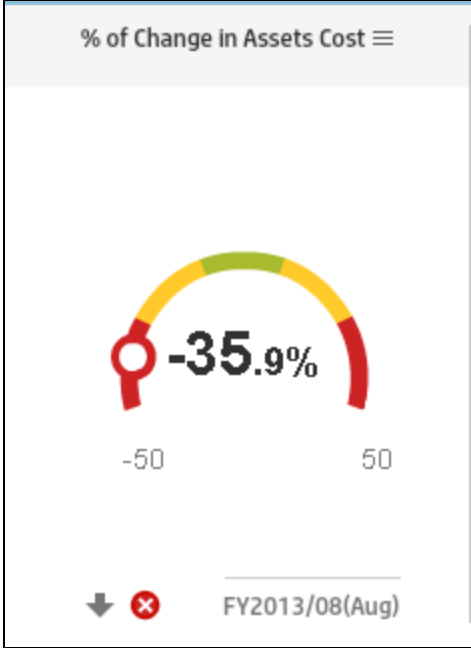
## Component Contents


Depending on the configuration you selected in the KPI View - Configure Component dialog box, the KPI View displays a bar or a gauge for each selected KPI.

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

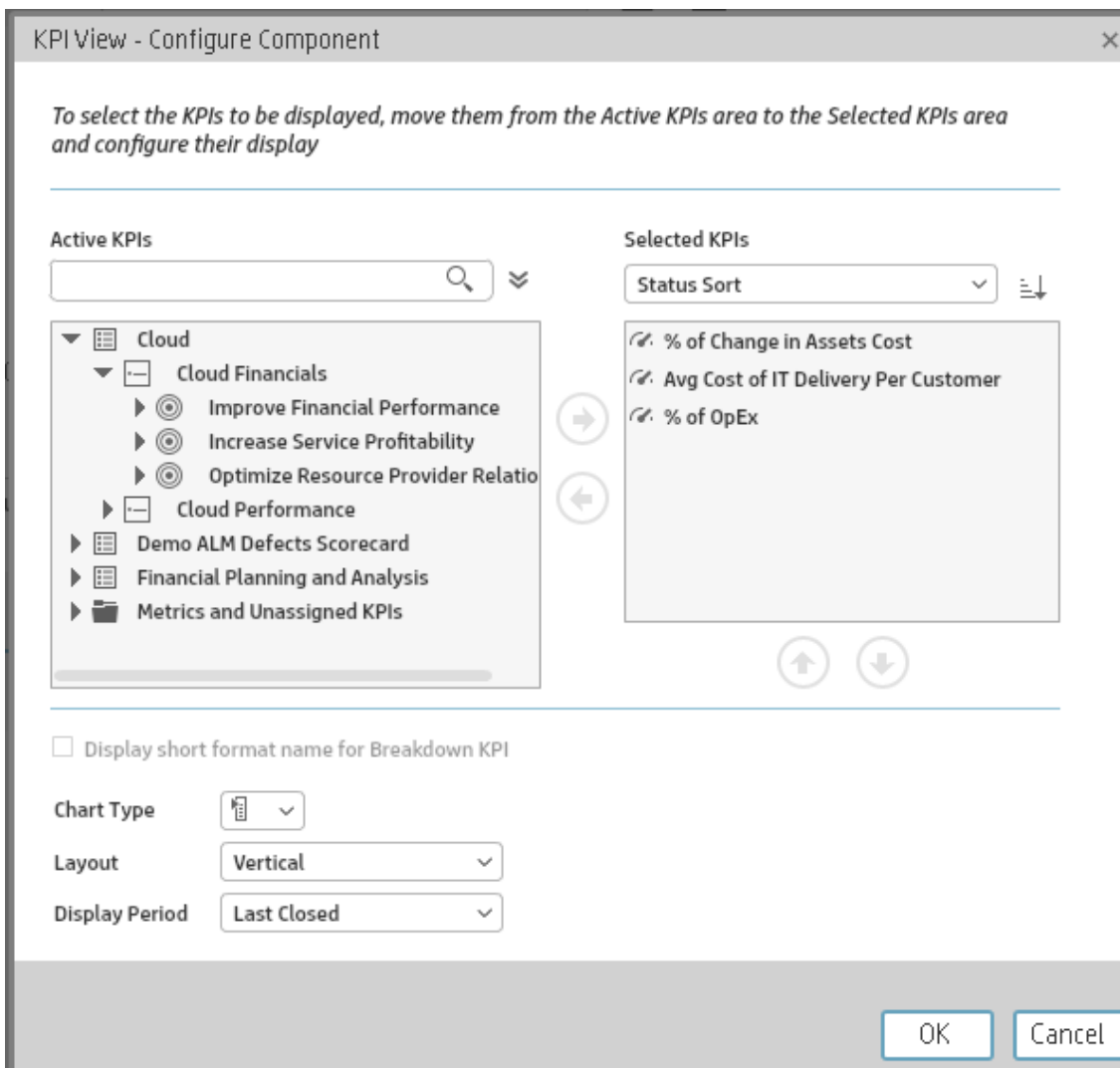
UI Element	Description
<p data-bbox="284 535 365 562">&lt;bars&gt;</p> 	<p data-bbox="776 535 1117 562">The bar displays for each KPI:</p> <ul data-bbox="776 598 1385 1680" style="list-style-type: none"> <li data-bbox="776 598 1385 724">• The title (above the bar for vertical layout or to the left of the bar for a horizontal layout) is the name of the KPI. Double-click the title to open the Explorer tab filtered for the selected KPI.</li> <li data-bbox="776 756 1385 997">• ≡ (or *≡ when a new annotation has been added to the KPI) Move the cursor above the icon to display the KPI tooltip that provides detailed information about the KPI and access to the Explorer in the context of the KPI. For details, see <a href="#">"First Level Navigation (FLN) for an Objective, a KPI, or a Metric"</a> on page 365.</li> <li data-bbox="776 1029 1385 1123">• The value (at the top of the colored bar for vertical layout or to the right of the bar for a horizontal layout) represent the highest threshold value.</li> <li data-bbox="776 1155 1385 1281">• The value (at the bottom of the colored bar for vertical layout or to the left of the bar for a horizontal layout) represent the lowest threshold value.</li> <li data-bbox="776 1312 1385 1386">• The colors of the small bars represent the thresholds defined for the KPI.</li> <li data-bbox="776 1417 1385 1512">• The value with unit in a color block on the gray bar shows the KPI value. The color of the block shows the KPI status.</li> <li data-bbox="776 1543 1385 1680">• The text (at the bottom of the bar for vertical layout or under the KPI name on the left of the bar for a horizontal layout) indicates the display period of the KPI.</li> </ul> <div data-bbox="812 1711 1372 1774" style="background-color: #f0f0f0; padding: 5px;"> <p data-bbox="828 1732 1226 1764"><b>Example</b> Typical horizontal layout:</p> </div>

UI Element	Description
	 <ul style="list-style-type: none"><li>• The icon to the left of the display period indicates the trend  calculated over the display period.</li><li>• The icon to the left of the display period indicates the status of the KPI during the display period:<ul style="list-style-type: none"><li>▪  indicates that the status is <b>Good</b>.</li><li>▪  indicates that the status is <b>Warning</b>.</li><li>▪  indicates that the status is <b>Error</b>.</li><li>▪  indicates that the status was not calculated or that there was an error in the calculation.</li></ul></li></ul>





UI Element	Description
<p data-bbox="282 306 394 336">&lt;Gauge&gt;</p> 	<p data-bbox="776 306 1117 336">The bar displays for each KPI:</p> <ul style="list-style-type: none"> <li data-bbox="776 373 1385 499">• The title (above the gauge for vertical layout or to the left of the gauge for a horizontal layout) is the name of the KPI. Double-click the title to open the Explorer tab filtered for the selected KPI.</li> <li data-bbox="776 537 1385 768">• ☰ (or ✖ when a new annotation has been added to the KPI) Move the cursor above the icon to display the KPI tooltip that provides detailed information about the KPI and access to the Explorer in the context of the KPI. For details, see <a href="#">"First Level Navigation (FLN) for an Objective, a KPI, or a Metric"</a> on page 365.</li> <li data-bbox="776 806 1385 869">• The value (to the right of the gauge) represent the highest threshold value.</li> <li data-bbox="776 907 1385 970">• The value (to the left of the gauge) represent the lowest threshold value.</li> <li data-bbox="776 1008 1385 1071">• The colors of the small bars represent the thresholds defined for the KPI.</li> <li data-bbox="776 1108 1385 1129">• The small circle indicates the value.</li> <li data-bbox="776 1167 1385 1272">• The value in the center of the gauge displays the value of the KPI with its unit. The color of the circle corresponds to the KPI status.</li> <li data-bbox="776 1310 1385 1436">• The text (at the bottom of the gauge for vertical layout or under the KPI name on the left of the gauge for a horizontal layout) indicates the display period of the KPI.</li> <li data-bbox="776 1474 1385 1537">• The icon to the left of the display period indicates the trend <math>\uparrow\downarrow</math> calculated over the display period.</li> <li data-bbox="776 1575 1385 1785">• The icon to the left of the display period indicates the status of the KPI during the display period: <ul style="list-style-type: none"> <li data-bbox="808 1617 1385 1659">▪ ✔ indicates that the status is <b>Good</b>.</li> <li data-bbox="808 1696 1385 1738">▪ ⚠ indicates that the status is <b>Warning</b>.</li> <li data-bbox="808 1776 1385 1797">▪ ✖ indicates that the status is <b>Error</b>.</li> </ul> </li> </ul>





UI Element	Description
	<p>Use the arrows to scroll between the "pages" of gauges or bars. The width of the "page" or the number of gauges or bars displayed on a "page" depend on the width of the component in the Dashboard.</p> <p>When you get to the leftmost page, the left arrow disappears. When you get to the rightmost page, the right arrow disappears.</p>


### KPI View - Configure Component Dialog Box



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

UI Element	Description
<Search>	<p>Enter the relevant string to display, in the tree in the Active KPIs box, only the KPIs whose name includes the string.</p> <p>In addition, the child KPIs of the filtered KPIs are also listed even when the child KPIs names do not include the string.</p>
≡	<p><b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:</p> <ul style="list-style-type: none"> <li>• <b>Status:</b> Select one of the <b>All</b>, <b>Good</b>, <b>Warning</b>, <b>Critical</b>, or <b>No Data</b> values to display only the elements with the selected status, in the Active KPIs area. When you select <b>No Data</b>, the search returns only the elements with no data.</li> <li>• <b>Type:</b> Select: <ul style="list-style-type: none"> <li>▪ <b>All.</b> To display all the elements in the tree with the selected Status.</li> <li>▪ <b>KPIs.</b> To display only the KPIs with the selected status.</li> <li>▪ <b>Objectives.</b> The Objectives and those of their KPIs that have the selected status.</li> </ul> </li> </ul>
<b>Active KPIs</b>	<p>The left-side box lists all the active Scorecards, Perspectives, Objectives, and their KPIs, and KPI Breakdowns listed in the Active KPIs pane in the Studio. The KPIs are highlighted.</p> <p>To select or deselect the elements you want to display in the report, use the right and left arrows   to move the elements from the Available KPIs to the Selected KPIs and back. You can also double-click the element to move it from one box to the other.</p>
<b>Selected KPIs</b>	<p>The right-side box lists all the selected KPIs that you want to display in the KPI Overtime report.</p> <p>To select or deselect the elements you want to display in the report, use the right and left arrows   to move the elements from the Available KPIs to the Selected KPIs and back. You can also double-click the element to move it from one box to the other.</p>

UI Element	Description
<Status sort>	<p>Select :</p> <ul style="list-style-type: none"><li>• <b>Alphabetical sort</b> to sort the selected elements in alphabetical order. You can then click the icon to the right of the box to select the reverse order. Depending on the selection, the icon can be one of the following: .</li><li>• <b>Status sort</b> to sort the selected elements according to their status (for example: KPIs with the <b>Critical</b> status, followed by KPIs with a <b>Warning</b> status, and then KPIs with a <b>Good</b> status).</li><li>• <b>Manual sort</b> to sort the selected elements manually using the   buttons. The buttons are available only when you select <b>Manual sort</b>.</li></ul>
	Click to display the KPIs in ascending or descending alphabetical order.

UI Element	Description								
<p><b>Display short format name for KPI Breakdown</b></p>	<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>You can select this option only when KPI Breakdowns have been defined and you have moved at least one of them to the Selected KPIs list.</li> <li>The name of a KPI Breakdown can be long because it is composed of the name of the parent KPI followed by the names of the entity and dimension you selected when you created it.</li> </ul> <p>In the Dashboard components, this can cause problems because the complete name of the KPI Breakdown is not displayed.</p> <table border="1" data-bbox="589 800 1385 842"> <tr> <td>KPI with many breakdown results: 2005.0 ≡</td> <td>KPI with many breakdown results: 2006.0 ≡</td> <td>KPI with many breakdown results: 2007.0 ≡</td> <td>KPI with many breakdown results: 2008.0 ≡</td> </tr> </table> <p>To display, in the component, only the name of the entity and dimension instead of the complete name of the KPI Breakdown:</p> <ol style="list-style-type: none"> <li>Move the relevant KPI Breakdown to the Selected KPIs area. The <b>Display short format name for KPI Breakdown</b> option is enabled.</li> <li>Select the <b>Display short format name for KPI Breakdown</b> option and click <b>OK</b>.</li> </ol> <p>The component display shows the short names of the KPI Breakdowns. A tooltip displays the full name of the KPI Breakdowns.</p> <table border="1" data-bbox="589 1283 1385 1325"> <tr> <td>YearNumber: 2005.0 ≡</td> <td>YearNumber: 2006.0 ≡</td> <td>YearNumber: 2007.0 ≡</td> <td>YearNumber: 2008.0 ≡</td> </tr> </table> <p>For details on KPI Breakdowns, see "<a href="#">KPI Breakdowns</a>" on page 160.</p>	KPI with many breakdown results: 2005.0 ≡	KPI with many breakdown results: 2006.0 ≡	KPI with many breakdown results: 2007.0 ≡	KPI with many breakdown results: 2008.0 ≡	YearNumber: 2005.0 ≡	YearNumber: 2006.0 ≡	YearNumber: 2007.0 ≡	YearNumber: 2008.0 ≡
KPI with many breakdown results: 2005.0 ≡	KPI with many breakdown results: 2006.0 ≡	KPI with many breakdown results: 2007.0 ≡	KPI with many breakdown results: 2008.0 ≡						
YearNumber: 2005.0 ≡	YearNumber: 2006.0 ≡	YearNumber: 2007.0 ≡	YearNumber: 2008.0 ≡						
<p><b>Chart Type</b></p>	<p>Select one of the following options:</p> <ul style="list-style-type: none"> <li> <b>Bar</b>. The display is a bar, laid out horizontally, or vertically, depending on your selection in the <b>Layout</b> field.</li> </ul> <p><b>Example</b> When you select <b>Layout=Vertical</b> and <b>Chart Type=Bar</b>, the result is as follows:</p>								



UI Element	Description
	<div data-bbox="623 304 1370 884" style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> </div> <ul style="list-style-type: none"> <li> <b>Gauge.</b> The display is a set of gauges, laid out horizontally, or vertically, depending on your selection in the <b>Layout</b> field.         </li> </ul> <div data-bbox="623 1058 1370 1528" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Example</b> When you select <b>Layout=Horizontal</b> and <b>Chart Type=Gauge</b>, the result is as follows:</p> </div>
<p><b>Layout</b></p>	<p>Select:</p> <ul style="list-style-type: none"> <li> <b>Vertical.</b> The layout of the results is vertical (KPI name above graph).         </li> <li> <b>Horizontal.</b> The layout of the results is horizontal (KPI name on the left of the graph).         </li> </ul>

UI Element	Description
<b>Display Period</b>	<p>Select the time period to be displayed in the component:</p> <ul style="list-style-type: none"><li>• <b>Current.</b> The values of the KPIs whose calculation period has completed as well as, for KPIs whose calculations are still proceeding, the values from the previous period.</li><li>• <b>&lt;Longest_period&gt;.</b> Each KPI has its own period (as configured in the Configuration details tab in the Studio). When you move KPIs from the Available KPIs to the Selected KPIs area in the filter, the longest period for all the selected KPIs is displayed as an additional option near the Display Period field. For example if one of the selected KPI's period is <b>Weekly</b> and another is <b>Yearly</b>, the Display Period field lists: <b>Current, Yearly, and Last Closed.</b></li></ul> <p>When you select the <b>&lt;Longest_period&gt;</b> another field opens on the right. It lists only the corresponding periods when the engine performed calculations. For example, if you select <b>Quarterly</b>, and the engine did not calculate the value of any KPI with the <b>Quarterly</b> period during the first and second quarters of 2008, these periods are not listed in the second field of the Display Period field.</p> <ul style="list-style-type: none"><li>• <b>Last Closed.</b> The values of only the KPIs whose calculation period has completed.</li></ul>

# The Page Filter Component

The Page Filter component enables the Executive User to filter the KPI/Metric Breakdowns displayed in the components of the page.

## To access:

You can view the component in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** ● ["The Page Filter Component" above](#) ● ["Tasks" on the next page](#) ● ["UI Description" on page 278](#)

## Learn More

**Permissions.** In the Dashboard components and in their configuration dialog boxes, you can only see the Scorecards, Perspectives, Objectives, KPIs, or KPI Breakdowns for which you have permission. If you do not have permission, you do not see that element. If you do not have permission to see all the elements in a component, the error message **Data is not displayed because it does not exist or you do not have the correct viewing permissions. Contact your administrator** is displayed.

## Wiring

The Page Filter component is automatically wired with the following components when these components are on the same Dashboard page:

- Historical Metric View component. For details, see ["The Historical Metric View Component" on page 221](#).
- Historical View component . For details, see ["The Historical View Component" on page 233](#).
- KPI View component. For details, see ["The KPI View Component" on page 263](#).
- KPI List component . For details, see ["The KPI List Component" on page 247](#).
- KPI Rolodex component. For details, see ["The KPI Rolodex Component" on page 255](#).
- Xcelsius Report Viewer Flash component. For details, see ["The Xcelsius Reports Viewer \(Flash\) Component" on page 320](#).
- Web Intelligence Dynamic Filter component. For details, see [The Web Intelligence Dynamic Report Viewer Component](#).
- Pie Chart component. For details, see ["The Pie Chart Component" on page 284](#).

You can also set up wiring between components. For additional information about wiring, see ["Wiring Between Components" on page 338](#).

## Important Information

All the time periods used in the component are periods of the fiscal year (For example, the end of the fiscal year depends on the fiscal year you have set at the system level).

**Tip:** If you want to view a page filtered by specific dimensions every time you open it, even if other users have viewed the page and selected other dimensions, proceed as follows:

1. Create the page and include a Page Filter component with the relevant Breakdowns.
2. Save the page.

Each user opens the page for the first time, selects the relevant dimensions, and collapse the component. The user leaves the page without saving it.

When the user reopens the page, the selected dimensions are restored for that user even if other users entered the page and selected different dimensions.



If needed, the user can then expand the component and change the selection.

## Tasks


**Main task:** ["Dashboard Display" on page 185](#)

### Add the Component to a Dashboard Page

To add a component to a page that is already formatted:

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

Note that double-click only works if you open the Component Gallery from the layout itself and not from the toolbar.

- 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 page. For user interface details, see ["Component Categories" on page 209](#).
  5. In the component, click the **Configure Component**  button or click **here** in **Click Here to**

**configure** in the center of the component.

6. In the component Filter dialog box that opens, select the information you want to display and click **OK**.

The component displays the required information.

For more information, see ["Page Layout and Components" on page 194](#).




## Filter Component in a Dashboard Page

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" on page 275](#)) 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" on page 211](#).
  - 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 or 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**.

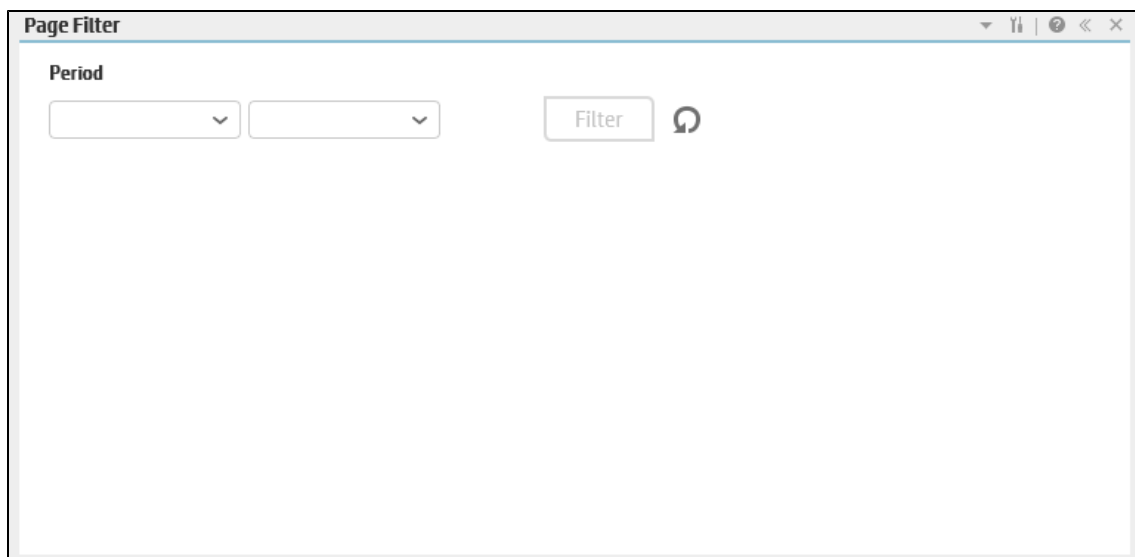
**Movie:** To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see [Movies](#).

## UI Description

### Page Filter Component (Display) Dialog Box












The component displays the period you can select, and the KPI/Metric Breakdowns you can select to filter the other components of the page.

**Tip:** It is important to have configured KPI Breakdowns or Metric Breakdowns before you add the Page Filter component to a Dashboard page. For details, see ["KPI Breakdowns" on page 160](#) or ["Metric Breakdowns" on page 167](#).



## Component Toolbar

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

UI Element	Description
	<p><b>Component Menu.</b> Opens a menu where you can select:</p> <ul style="list-style-type: none"> <li>  <b>Preferences</b> <b>Preferences.</b> Depending on the component you are currently configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>.         </li> <li>  <b>Wiring</b> <b>Wiring.</b> Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see "<a href="#">Wiring Between Components</a>" on page 338.         </li> <li>  <b>Refresh</b> <b>Refresh.</b> Refreshes the display. The button is disabled in the Page Filter component.         </li> <li>  <b>Open in a New Window</b> <b>Open in a New Window.</b> Opens the component in a new window.         </li> </ul>
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <a href="#">here</a> in <b>Click Here to configure</b> in the center of the component</p>
	<p>Opens the online documentation page relevant to the component you are currently configuring.</p>
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>
	<p>Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.</p>
	<p><b>Remove Component.</b> Removes the component from the page.</p>

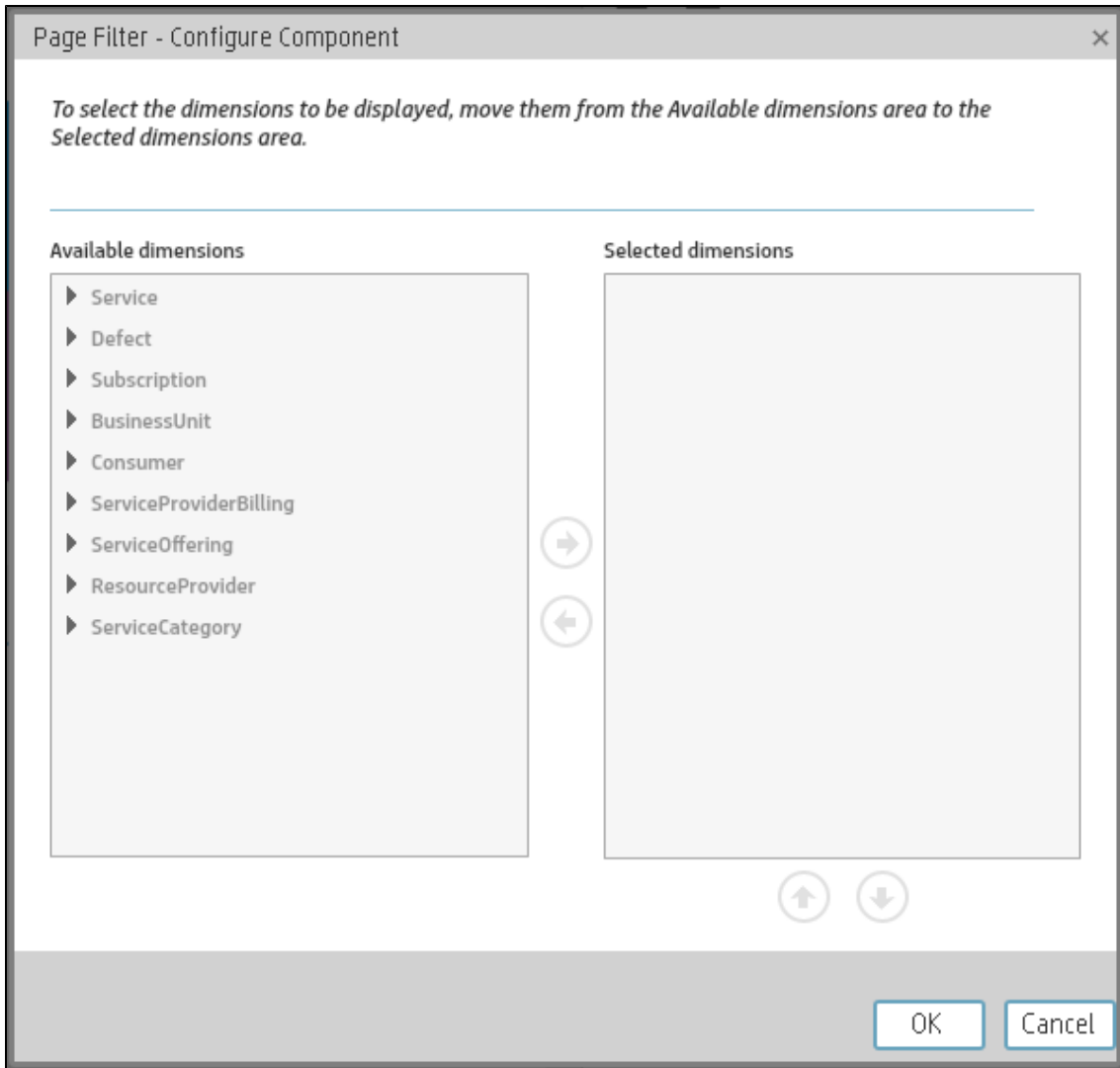
### Component Contents

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

UI Element	Description
<p><b>Period</b></p>	<p>Select the display period type. It can be <b>Last Closed, Current, Weekly, Quarterly, Monthly, or Yearly</b>. If you select a specific period type, all the KPIs and Metrics with a periodicity that is different from the selected periodicity show <b>No data</b>. The values that are displayed correspond to the periods used when the engine runs calculations. If the engine has not yet run calculations this field is empty.</p> <p>Once you select one of the <b>Weekly, Quarterly, Monthly, or Yearly</b> display period types, another field opens where you can select the specific period corresponding to that type.</p> <div style="background-color: #f0f0f0; padding: 5px; margin: 10px 0;"> <p><b>Example</b> If you select Quarterly, you can select <b>FY2011/Q1, FY2011/Q2, FY2011/Q3, or FY2011/Q4</b>.</p> </div> <p>The period you select replaces the display period of all the Dashboard page components wired to the Page Filter component and causes a refresh of the relevant components on the page when you click <b>Filter</b>.</p>
<p><b>&lt;entity:dimension&gt;</b></p>	<p>Each entity and dimension that you selected in the Page Filter - Configure Component Dialog Box is displayed in the Page Filter and the dropdown box displays the list of values that you selected for each entity and dimension.</p> <p>When a large number of entity:dimensions are selected, a scrollbar is automatically displayed.</p> <p>The values of the entity:dimension you select replace the entity and dimensions you selected for all the Dashboard page components wired to the Page Filter component and causes a refresh for the relevant elements in the components when you click <b>Filter</b>.</p>
<p><b>Filter</b></p>	<p>Click to filter the page wired components with the selections you made in the Page Filter.</p>
<p><b>Clear</b></p>	<p>Click to clear the selections you made.</p>





## Page Filter - Configure Component Dialog Box



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

UI Element	Description
<b>Available dimensions</b>	The list of entities and dimensions corresponding to the KPI Breakdowns or Metric Breakdowns that were defined in the Studio.

UI Element	Description
<b>Selected dimensions</b>	<p>The list of entities and dimensions you selected using the arrows.</p> <p>You can then select the values of the dimensions you want to include in the filter. You can also exclude a specific value from the filter by not selecting it.</p> <p>You can also globally select or deselect a dimension values by clicking the check box at the level of the dimension. You can then select or deselect the dimension values you want or do not want to include in the filter. If only some of the dimension values are selected or deselected, the check box at the level of the dimension is partially filled in:</p>  <p>The screenshot shows a dropdown menu titled "Defect: Severity". At the top left of the menu is a small blue square with a white checkmark, indicating that the entire dimension is selected. Below this are four list items, each with a checkbox: "1 - Urgent" (checked), "2 - High" (unchecked), "3 - Medium" (checked), and "4 - Low" (checked). The "2 - High" item is highlighted with a blue background.</p>

UI Element	Description
	<p>Select an entity and dimension in the Selected dimensions tree to move it up or down in the tree.</p> <p>The order of the selected entities and dimensions is the order displayed in the Page Filter.</p> <p>To view the information, you must have defined the correct KPI/Metric Breakdowns.</p> <div data-bbox="456 569 1369 1335" style="background-color: #f0f0f0; padding: 10px;"><p><b>Example</b></p><p>If the tree of KPIs and KPI Breakdowns is:</p><ul style="list-style-type: none"><li>• % Attrition<ul style="list-style-type: none"><li>▪ % Attrition by Organization<ul style="list-style-type: none"><li>○ % Attrition by Location</li></ul></li></ul></li></ul><p>If, in the Page Filter - Configure Component dialog box, you select Organization and then Location, the Page filter shows two drop downs: Organization and Location. If you select a value in Organization and a value in Location, the wired components are filtered according to the values you selected. If you do not select a value in Organization but select a value in Location, the KPI Breakdowns in the wired components display <b>No data</b>.</p><p>To prevent this problem, it is recommended to also define the other combination of entities and dimensions as follows:</p><ul style="list-style-type: none"><li>• % Attrition<ul style="list-style-type: none"><li>▪ % Attrition by Organization<ul style="list-style-type: none"><li>○ % Attrition by Location</li></ul></li><li>▪ % Attrition by Location</li></ul></li></ul></div>

# The Pie Chart Component

The Pie Chart component displays the selected KPIs or Metrics distribution, either by selecting the different slices or by selecting a breakdown.

## To access:

You can view the report in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" below](#) ● ["UI Description" on the next page](#)

## Learn More

- All the time periods used in the component are periods of the fiscal year (For example, the end of the fiscal year depends on the fiscal year you have set at the system level).
- The component presents KPIs as if they were Metrics (that is, without statuses or thresholds).



**Permissions.** In the Dashboard components and in their configuration dialog boxes, you can only see the Scorecards, Perspectives, Objectives, KPIs, or KPI Breakdowns for which you have permission. If you do not have permission, you do not see that element. If you do not have permission to see all the elements in a component, the error message **Data is not displayed because it does not exist or you do not have the correct viewing permissions. Contact your administrator** is displayed.

## Tasks


**Main task:** ["Dashboard Display" on page 185](#)

### Add the Component to a Dashboard Page

To add a component to a page that is already formatted:

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

Note that double-click only works if you open the Component Gallery from the layout itself and not from the toolbar.

- 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 page. For user interface details, see "[Component Categories](#)" on [page 209](#).
  5. In the component, click the **Configure Component**  button or click **here** in **Click Here to configure** in the center of the component.
  6. In the component Filter dialog box that opens, select the information you want to display and click **OK**.

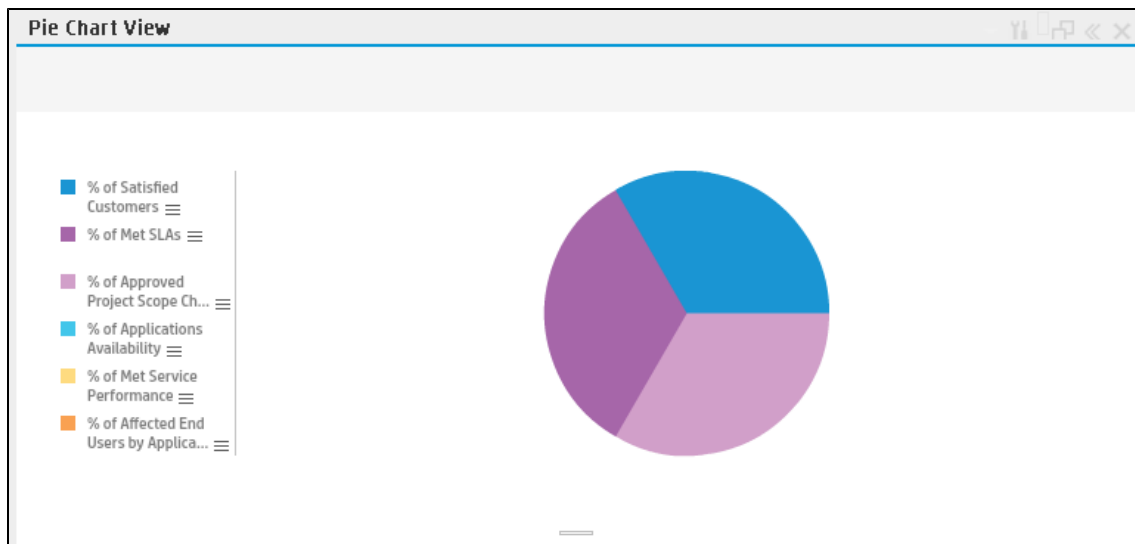
The component displays the required information.

For more information, see "[Page Layout and Components](#)" on [page 194](#).

## UI Description












### Pie Chart View Component

The Pie Chart View component displays a pie chart that enables you to compare the values of the selected Metrics or KPIs for the selected time period or the values of the selected KPI Breakdown or Metric Breakdown dimension for the selected time period.



## Component Toolbar

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

UI Element	Description
	<p><b>Component Menu.</b> Opens a menu where you can select:</p> <ul style="list-style-type: none"> <li>  <b>Preferences</b> <b>Preferences.</b> Depending on the component you are current configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>.         </li> <li>  <b>Wiring</b> <b>Wiring.</b> Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see <a href="#">"Wiring Between Components" on page 338</a>.         </li> <li>  <b>Refresh</b> <b>Refresh.</b> Refreshes the display. The button is disabled in the Page Filter component.         </li> <li>  <b>Open in a New Window</b> <b>Open in a New Window.</b> Opens the component in a new window.         </li> </ul>
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <a href="#">here</a> in <b>Click Here to configure</b> in the center of the component</p>
	<p>Opens the online documentation page relevant to the component you are currently configuring.</p>
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>
	<p>Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.</p>
	<p><b>Remove Component.</b> Removes the component from the page.</p>

### <Component Contents>

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

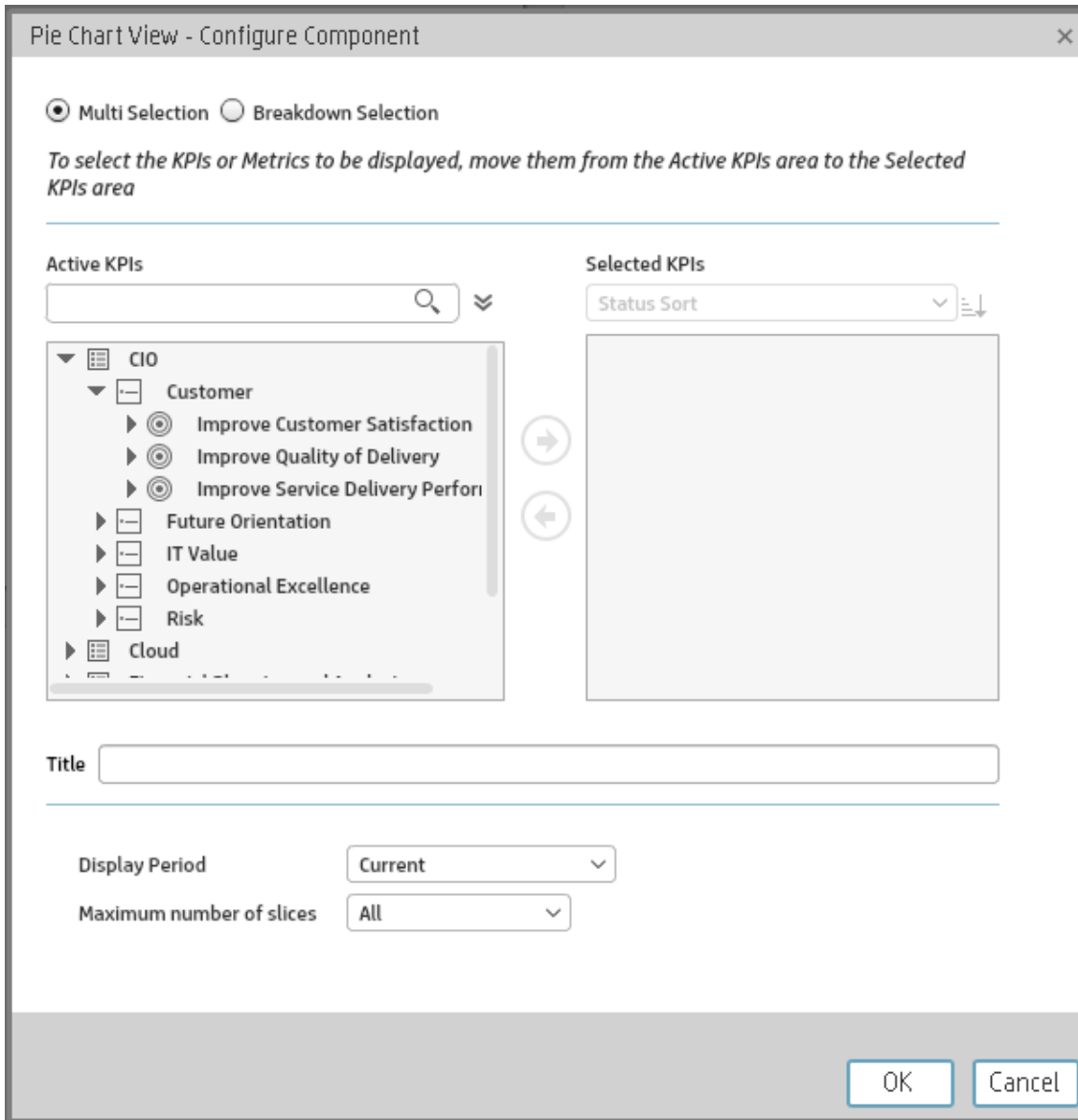
UI Element	Description
<Pie>	<ul style="list-style-type: none"><li>• If you have selected <b>Breakdown Selection</b>, and depending on the number of slices you have selected, you can view one of the following:<ul style="list-style-type: none"><li>▪ Each value of the KPI or Metric Breakdown dimension is represented by a slice of the pie.</li><li>▪ One or more slices represent the highest values of the KPI or Metric Breakdown dimension, and one of the slices represents all the other values of the KPI or Metric Breakdown dimension.</li></ul></li><li>• If you have selected <b>Multi-Selection</b>, and depending on the number of slices you have selected, you can view one of the following:<ul style="list-style-type: none"><li>▪ Each selected item is represented by a slice in the pie.</li><li>▪ One or more slices represent the selected items with the highest value, and one of the slices represents all the remaining items.</li></ul></li></ul>

UI Element	Description
<Legend>	<p>Lists one of the following:</p> <ul style="list-style-type: none"> <li>• If you have selected <b>Breakdown Selection</b>: <ul style="list-style-type: none"> <li>▪ The color of the slice followed by the name of the corresponding KPI or Metric Breakdown dimension's value. Double-click the name to open the Explorer tab filtered for the selected element.</li> <li>▪ ≡ (or *≡ when a new annotation has been added to the KPI or Metric Breakdown). Move the cursor above the icon to display the tooltip that provides detailed information about the KPI or Metric Breakdown and access to the Explorer tab in the context of the KPI or Metric Breakdown. For details, see <a href="#">"First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 365</a>.</li> </ul> </li> <li>• If you have selected <b>Multi-Selection</b>: <ul style="list-style-type: none"> <li>▪ The color of the slice followed by the name of the corresponding Metric or KPI, followed by the unit. Double-click the name to open the Explorer tab filtered for the selected element.</li> <li>▪ ≡ (or *≡ when a new annotation has been added to the KPI or Metric Breakdown). Move the cursor above the icon to display the tooltip that provides detailed information about the KPI or Metric Breakdown and access to the Explorer tab in the context of the KPI or Metric Breakdown. For details, see <a href="#">"First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 365</a>.</li> </ul> </li> </ul>
<Tooltip>	<p>Move the mouse over the pie slices to display a tooltip that include detailed information about the selected item. For details, see <a href="#">"First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 365</a>.</p>

### Pie Chart View Configure Component Dialog Box

Use the dialog box to configure the Pie Chart View component displayed in the Dashboard.







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

UI Element	Description
<b>Multi Selection/ Breakdown Selection</b>	<ul style="list-style-type: none"> <li>• <b>Multi Selection.</b> You use this option when you want to compare several metrics or KPIs. For details, see below.</li> <li>• <b>Breakdown Selection.</b> Select this option when you want to compare the values of the selected KPI Breakdown dimension. For details, see below.</li> </ul>

### Multi Selection

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

UI Element	Description
<Search>	<p>Enter the relevant string to display, in the tree, only the metrics or KPIs whose name includes the string.</p> <p>In addition, the child KPIs of the filtered KPIs are also listed even when the child KPIs names do not include the string.</p>
⌵	<p><b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:</p> <ul style="list-style-type: none"> <li>• <b>Status:</b> Select one of the <b>All</b>, <b>Good</b>, <b>Warning</b>, <b>Critical</b>, or <b>No Data</b> values to display only the elements with the selected status, in the Active KPIs area. When you select <b>No Data</b>, the search returns only the elements with no data.</li> <li>• <b>Type.</b> Select: <ul style="list-style-type: none"> <li>▪ <b>All.</b> To display all the elements in the tree with the selected Status.</li> <li>▪ <b>KPIs.</b> To display, in the tree, only the KPIs.</li> <li>▪ <b>Objective.</b> To display in the tree, only the Objectives and their KPIs.</li> <li>▪ <b>Metrics.</b> To display, in the tree, only the metrics.</li> </ul> </li> </ul>
<b>Active KPIs</b>	<p>The tree box lists all the active Scorecards, Perspectives, Objectives, and their KPIs, and KPI Breakdowns listed in the Active KPIs pane in the Studio. The items that can be selected are highlighted.</p> <p>To select or deselect the elements you want to display in the report, use the right and left arrows → ← to move the elements from the Available KPIs to the Selected KPIs and back. You can also double-click the element to move it from one box to the other.</p> <div style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> You can only select metrics or KPIs with the same unit and with the same period. An error message is displayed if your selection does not match these criteria.</p> </div>
<b>Selected KPIs</b>	<p>The box lists all the selected metrics or KPIs that you want to display in the component.</p> <p>To select or deselect the elements you want to display in the report, use the right and left arrows → ← to move the elements from the Available KPIs to the Selected KPIs and back. You can also double-click the element to move it from one box to the other.</p>

UI Element	Description
<Status sort>	<p>Select :</p> <ul style="list-style-type: none"> <li>• <b>Alphabetical sort</b> to sort the selected elements in alphabetical order. You can then click the icon to the right of the box to select the reverse order. Depending on the selection, the icon can be one of the following: .</li> </ul>
	Click to display the KPIs in ascending or descending alphabetical order.
<b>Title</b>	Enter the title of the component in the Dashboard page.
<b>Display Period</b>	<p>Select the time period to display in the component:</p> <ul style="list-style-type: none"> <li>• <b>Current.</b> The values of the selected metrics or KPIs whose calculation period has not yet completed according to the selected metrics or KPIs configured periodicity.</li> <li>• <b>Last Closed.</b> The values of the selected metrics or KPIs whose calculation period has already completed according to the selected metrics or KPIs configured periodicity.</li> <li>• <b>Yearly/Monthly/Quarterly/Weekly/Daily.</b> The list of time periods represents the longest periodicity configured for the selected metrics or KPIs. When you select <b>Yearly/Monthly/Quarterly/Weekly/Daily</b>, another field opens on the right. It lists only the years/months/quarters/weeks/days when the engine performed calculations. The values displayed in the pie chart are the values of the metrics or KPIs that have completed for the selected periods.</li> </ul>
<b>Maximum number of slices</b>	<p><b>All.</b> Each item selected in the tree is represented by a slice in the pie.</p> <p><b>2.</b> The item with the highest value is represented by a slice. The 3 items with the next highest values are represented by the other slice. A tooltip displays the details of these 3 items.</p> <p><b>3, 4, 5, 6, 7, 8, 9.</b> The item with the highest value is represented by a slice. Depending on the selected number of slices, each one of the other slices corresponds to the item with the next highest value. The last slice represents the 3 items with the next highest values. A tooltip displays the details of these 3 items.</p>

### Breakdown Selection

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

UI Element	Description
<Search>	<p>Enter the relevant string to display, in the tree, only the metrics or KPIs whose name includes the string.</p> <p>In addition, the child KPIs of the filtered KPIs are also listed even when the child KPIs names do not include the string.</p>
⌵	<p><b>Advanced search.</b> Opens additional fields to help you refine the component's filter:</p> <ul style="list-style-type: none"> <li>• <b>All.</b> To display, in the tree, all the elements.</li> <li>• <b>KPI.</b> To display, in the tree, only the KPIs.</li> <li>• <b>Metric.</b> To display, in the tree, only the Metrics.</li> <li>• <b>Objective.</b> To display, in the tree, only the Objectives.</li> </ul>
<Tree>	<p>The tree box lists all the active Scorecards, Perspectives, Objectives, and their KPIs, and KPI Breakdowns listed in the Active KPIs pane in the Studio. Only the KPI Breakdowns are highlighted.</p> <p>To select the item you want to display in the report, double-click it. It is then listed in the <b>Selected metric</b> box. To unselect the item, remove it from the <b>Selected metrics</b> box.</p>
<b>Selected metrics</b>	<p>The box lists the selected KPI or Metric Breakdowns.</p> <p>To deselect the item, remove it from the <b>Selected metrics</b> box.</p>
<b>Display Period</b>	<p>Select the time period to be displayed in the component:</p> <ul style="list-style-type: none"> <li>• <b>Current.</b> The values of the selected KPI Breakdown dimensions whose calculation period has not yet completed according to the selected metrics or KPIs configured periodicity.</li> <li>• <b>Last Closed.</b> The values of the selected KPI Breakdown dimensions whose calculation period has already completed according to the selected metrics or KPIs configured periodicity.</li> <li>• <b>Yearly/Monthly/Quarterly/Weekly/Daily.</b> The list of time periods represents the longest periodicity configured for the selected KPI Breakdown dimension. When you select <b>Yearly/Monthly/Quarterly/Weekly/Daily</b>, another field opens on the right. It lists only the years/months/quarters/weeks/days when the engine performed calculations. The values displayed in the pie chart are the values of the KPI Breakdown dimensions that have completed for the selected periods.</li> </ul>

UI Element	Description
<b>Maximum number of slices</b>	<p><b>All.</b> Each value of the KPI Breakdown dimension is represented by a slice of the pie.</p> <p><b>2.</b> The dimension with the highest value is represented by a slice. The 3 highest other values are represented by the other slice. A tooltip displays the details of the 3 highest other values.</p> <p><b>3, 4, 5, 6, 7, 8, 9.</b> The dimension with the highest value is represented by a slice. Depending on the selected number of slices, each one of the other slices corresponds to the next highest value of the dimension. The last slice represents all the other remaining values. A tooltip displays the details of the 3 highest other remaining values.</p>

# The Scorecard Component

The Scorecard component (Balanced Scorecard) displays the list of selected Perspectives and their Objectives with their value, trend, and status for the measurement period.

## To access:

You can view the report in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" below](#) ● ["UI Description" on the next page](#)

## Learn More



- All the time periods used in the component are periods of the fiscal year (For example, the end of the fiscal year depends on the fiscal year you have set at the system level).
- **Permissions.** In the Dashboard components and in their configuration dialog boxes, you can only see the Scorecards, Perspectives, Objectives, KPIs, or KPI Breakdowns for which you have permission. If you do not have permission, you do not see that element. If you do not have permission to see all the elements in a component, the error message **Data is not displayed because it does not exist or you do not have the correct viewing permissions. Contact your administrator** is displayed.

## Tasks

**Main task:** ["Dashboard Display" on page 185](#)


### Add a Component to a Dashboard Page

To add a component to a page that is already formatted:

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

Note that double-click only works if you open the Component Gallery from the layout itself and not from the toolbar.

- 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.

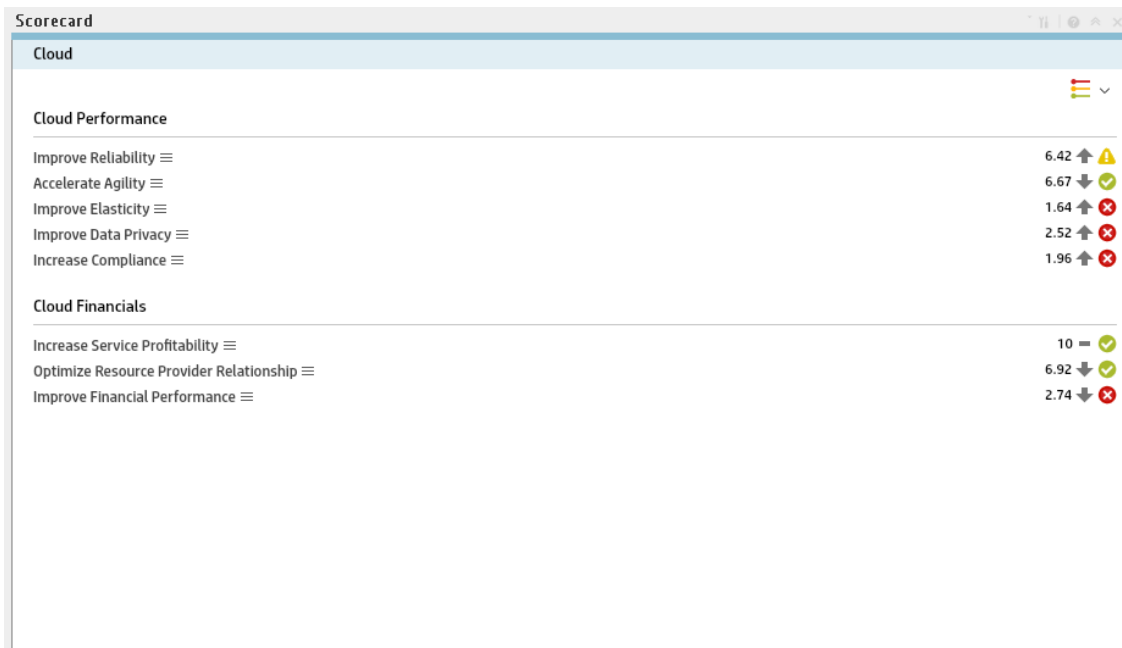
- If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of the target area, and not to the part of the component that is colored white.
- 4. Close the Component Gallery page. For user interface details, see ["Component Categories" on page 209](#).
- 5. In the component, click the **Configure Component**  button or click **here** in **Click Here to configure** in the center of the component.
- 6. In the component Filter dialog box that opens, select the information you want to display and click **OK**.

The component displays the required information.

For more information, see ["Page Layout and Components" on page 194](#).


## UI Description











### Scorecard Component



### Component Toolbar

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

UI Element	Description
	<b>Component Menu.</b> Opens a menu where you can select:








UI Element	Description
	<ul style="list-style-type: none"> <li data-bbox="542 310 1385 499">  <b>Preferences</b> <b>Preferences.</b> Depending on the component you are current configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>.         </li> <li data-bbox="542 531 1385 678">  <b>Wiring</b> <b>Wiring.</b> Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see "<a href="#">Wiring Between Components</a>" on page 338.         </li> <li data-bbox="542 709 1385 804">  <b>Refresh</b> <b>Refresh.</b> Refreshes the display. The button is disabled in the Page Filter component.         </li> <li data-bbox="542 835 1385 919">  <b>Open in a New Window</b> <b>Open in a New Window.</b> Opens the component in a new window.         </li> </ul>
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <a href="#">here</a> in <b>Click Here to configure</b> in the center of the component</p>
	<p>Opens the online documentation page relevant to the component you are currently configuring.</p>
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>
	<p>Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.</p>
	<p><b>Remove Component.</b> Removes the component from the page.</p>



### <Component Contents>

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

UI Element	Description
<p>&lt;Component contents&gt;</p>	<p>The following information is displayed, from left to right:</p> <ul style="list-style-type: none"> <li>• The name of the Scorecard. Double-click the name to open the Explorer tab filtered for the selected element.</li> <li>• ▾ Indicates that the Scorecard has Cascading (subordinate) Scorecards. Click the arrow to display the list of the Cascading Scorecards and select the relevant one to display its information. To return to the parent Scorecard, click the X to close the Cascading Scorecard display. Note that you can only access one level down (meaning that if the Cascading Scorecard has subordinates, to access their information, you must create a Scorecard component for the first level of Cascading Scorecard).</li> </ul> <div data-bbox="505 863 1143 1150" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="margin: 0;"><b>Scorecard</b></p> <p style="margin: 0;">VP Applications ▾</p> <div style="border: 1px solid #ccc; padding: 2px; margin: 2px 0;">Financial Planning and Analysis</div> <p style="margin: 0;">Secured IT</p> <hr style="border: 0; border-top: 1px solid #ccc; margin: 5px 0;"/> <p style="margin: 0;">Reduce Risk ≡</p> </div> <ul style="list-style-type: none"> <li>• The name of the Perspective you selected in the Scorecard - Component Filter dialog box. For details, see "<a href="#">Scorecard - Configure Component Dialog Box</a>" on page 299.</li> <li>• The Perspective's Objectives, sorted by status (with the error status first) with: <ul style="list-style-type: none"> <li>■ The score of the Objective.</li> <li>■ ≡ (or *≡ when a new annotation has been added to the Objective) Move the cursor above the icon to display the Objective tooltip that provides detailed information about the Objective and access to the Explorer tab in the context of the Objective. For details, see "<a href="#">First Level Navigation (FLN) for an Objective, a KPI, or a Metric</a>" on page 365.</li> <li>■ ↕ The trend icon that indicates the trend of the Objective over the display period.</li> <li>■ The status of the Objective during the display period. It can be: <ul style="list-style-type: none"> <li>○ ✓ indicates that the status is <b>Good</b>.</li> </ul> </li> </ul> </li> </ul>

UI Element	Description
	<ul style="list-style-type: none"> <li>○  indicates that the status is <b>Warning</b>.</li> <li>○  indicates that the status is <b>Error</b>.</li> <li>○  indicates that status was not calculated or that there was an error in the calculation.</li> </ul>
	<p>Click the button in the top right corner of the Scorecard and select the relevant status:</p> <p> to display all the Objectives with any Status.</p> <p> to display only the Objectives with an <b>Error</b> Status.</p> <p> to display only the Objectives with a <b>Warning</b> status.</p> <p>The default selection is configured in the <b>Default filter state</b> field in the Scorecard - Component Filter dialog box. For details, see "<a href="#">Scorecard - Configure Component Dialog Box</a>" on the next page.</p>
<b>&lt;Tooltip&gt;</b>	<p>Move the mouse over the name of an Objective in the list to display a tooltip that include detailed information about the KPI. For details, see "<a href="#">First Level Navigation (FLN) for an Objective, a KPI, or a Metric</a>" on page 365.</p>

## Scorecard - Configure Component Dialog Box

Scorecard - Configure Component

Select the Scorecard, order its Perspectives, and configure its display

Scorecard displayed: Cloud

Order of perspectives:

Cloud Performance  
Cloud Financials


Default filter state: All

Time Period: Current

OK Cancel

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

UI Element	Description
<b>Scorecard displayed</b>	<p>Select the Scorecard you want to display in the component.</p> <p>The list of Scorecards that is displayed corresponds to the Scorecards that are permitted for your user. For details about permissions, see <a href="#">User Management</a> in the <i>IT Executive Scorecard Administrator Guide</i>.</p> <p>The list of the Scorecard's Perspectives is displayed in the Order of Perspectives box.</p>

UI Element	Description
<b>Order of perspectives</b>	<p>Select a Perspective and use the <b>Up</b> and <b>Down</b> buttons to order the Perspectives as you want to display them in the Scorecard component in the Dashboard.</p> 
<b>Default filter state</b>	<p>Select the icon that is automatically selected in the Scorecard display:</p> <ul style="list-style-type: none"> <li>● <b>All</b></li> <li>● <b>Critical and Warning</b></li> <li>● <b>Critical</b></li> </ul>
<b>Time Period</b>	<p>Select the time period to be displayed in the component:</p> <ul style="list-style-type: none"> <li>● <b>Current.</b> In the Dashboard, the component displays the selected Scorecard, its Perspectives, and under the Perspectives, the Objectives, their values, trends, and statuses corresponding to the current period.</li> <li>● <b>Last Closed.</b> In the Dashboard, the component displays the selected Scorecard, its Perspectives, and under the Perspectives, the Objectives, their values, trends, and statuses corresponding to their last closed periods.</li> <li>● <b>Yearly.</b> When you select <b>Yearly</b> an additional field opens. The additional field displays the list of past years that have completed (not the current year) and during which the Objectives have been calculated.  In the Dashboard, the component displays the selected Scorecard, its Perspectives, and under the Perspectives, the Objectives, their values, trends, and statuses corresponding to the end of the period you selected in the additional field.</li> <li>● <b>Quarterly.</b> When you select <b>Quarterly</b> an additional field opens. The additional field displays the list of past quarters that have completed (not the current quarter) and during which the Objectives have been calculated.  In the Dashboard, the component displays the selected Scorecard, its Perspectives, and under the Perspectives, the Objectives, their values, trends, and statuses corresponding to the end of the period you selected in the additional field.</li> <li>● <b>Monthly.</b> When you select <b>Monthly</b> an additional field opens. The additional field displays the list of past months that have completed (not the current month) and during which the Objectives have been calculated.  In the Dashboard, the component displays the selected Scorecard, its</li> </ul>

UI Element	Description
	<p>Perspectives, and under the Perspectives, the Objectives, their values, trends, and statuses corresponding to the end of the period you selected in the additional field.</p> <ul style="list-style-type: none"> <li> <b>Weekly.</b> When you select <b>Weekly</b> an additional field opens. The additional field displays the list of past weeks that have completed (not the current week) and during which the Objectives have been calculated. </li> </ul> <p>In the Dashboard, the component displays the selected Scorecard, its Perspectives, and under the Perspectives, the Objectives with calculations that have completed during the period you selected in the additional field.</p> <ul style="list-style-type: none"> <li> <b>Daily.</b> When you select <b>Daily</b> an additional field opens. The additional field displays the list of past days that have completed (not the current day) and during which the Objectives have been calculated. </li> </ul> <p>In the Dashboard, the component displays the selected Scorecard, its Perspectives, and under the Perspectives, the Objectives with calculations that have completed during the period you selected in the additional field.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>If you select the <b>Current</b> Time Period, each Objective displays the results of its current period.</li> <li>If you select the <b>Last Closed</b> Time Period, each Objective displays the results corresponding to its last closed period.</li> <li>If you select a specific period in the Scorecard component configuration in the Dashboard and the Objectives in the Scorecard have different periodicities, then only the highest Periodicity is listed and available for selection.</li> <li>If in the Dashboard Scorecard component, the Scorecard has Objectives with different time periods, the Scorecard filter displays only the longest time period between the Scorecard Objectives in its Time Period list. For example: if the configured Scorecard includes Objective-1 with a monthly periodicity and Objective-2 with a weekly periodicity then all Time Periods less than monthly will be not accessible in the configuration window. Time Periods larger than monthly might be available depending on the calculations that were performed on the relevant context.</li> </ul>

# The Web Intelligence Report Viewer Component

The Web Intelligence Report Viewer component enables the user to view the selected SAP BusinessObjects report.

## To access:

You can view the report in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** • ["Learn More" below](#) • ["Tasks" below](#) • ["UI Description" on page 304](#)

## Learn More

- A Web Intelligence Report Viewer component displays only one SAP BusinessObjects report. If you want to display more than one Web Intelligence Report Viewer in the Dashboard, you can create multiple Web Intelligence Report Viewer components and rename each component.
- The size of Web Intelligence reports can impact how the reports are displayed in the Dashboard page. The sizes are 374 pixels (width) x 199 pixels (height), 583 pixels (width) x 204 pixels (height), or 374 pixels (width) x 324 pixels (height). The description of each Web Intelligence report includes its size. For details, see ["Web Intelligence Reports and Operational Reports" on page 347](#) in the *IT Executive Scorecard Reports Reference Guide*.

## Tasks

**Main task:** ["Dashboard Display" on page 185](#)



This section includes the following tasks:

["Add a Component to a Dashboard Page" below](#)

["Wire the Web Intelligence Report Viewer component to the Page Filter component" on the next page](#)


### Add a Component to a Dashboard Page

To add a component to a page that is already formatted:

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 page that opens, click or double-click the component to place it in

the layout area, or select the component and drag it to an area on the page.

Note that double-click only works if you open the Component Gallery from the layout itself and not from the toolbar.

- 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 page. For user interface details, see ["Component Categories" on page 209](#).
  5. In the component, click the **Configure Component**  button or click **here** in **Click Here to configure** in the center of the component.
  6. In the component Filter dialog box that opens, select the information you want to display and click **OK**.

The component displays the required information.

For more information, see ["Page Layout and Components" on page 194](#).

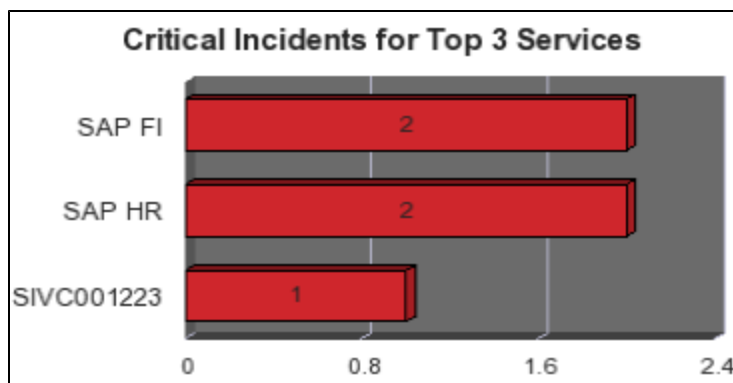
## Wire the Web Intelligence Report Viewer component to the Page Filter component

To wire the Web Intelligence Report Viewer component to the Page Filter component, make sure that the report that you create to included in the Web Intelligence Report Viewer component includes a prompt with a name that uses the **<entity>;<dimension>** format. The entity and dimension correspond to the entity and dimension the user selects in the Page Filter Component.

For details about the Page Filter, see ["The Page Filter Component" on page 275](#).












## UI Description

### Web Intelligence Report Viewer Component



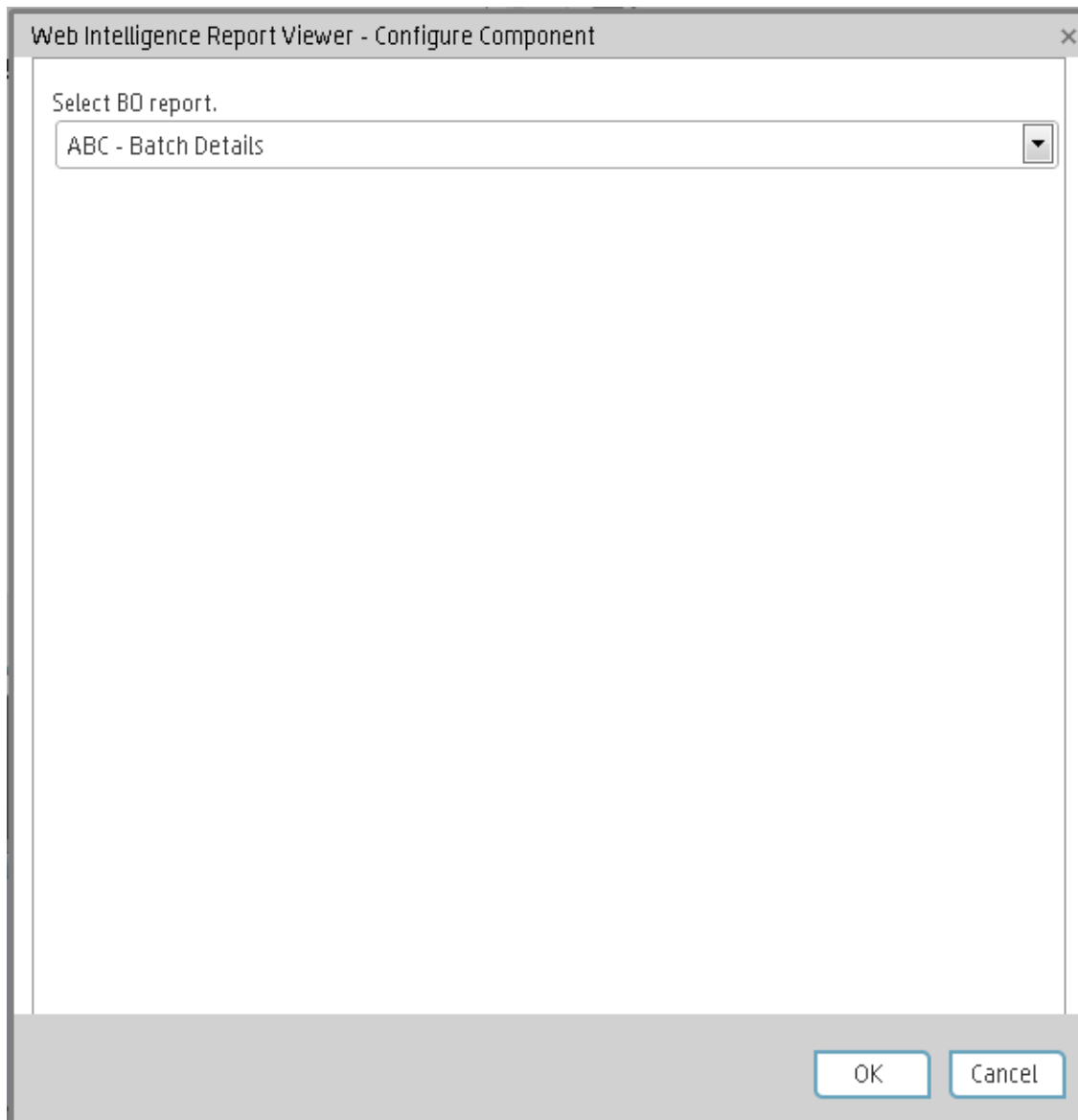
## Component Toolbar

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

UI Element	Description
	<p><b>Component Menu.</b> Opens a menu where you can select:</p> <ul style="list-style-type: none"> <li>  <b>Preferences</b> <b>Preferences.</b> Depending on the component you are current configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>.         </li> <li>  <b>Wiring</b> <b>Wiring.</b> Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see <a href="#">"Wiring Between Components" on page 338</a>.         </li> <li>  <b>Refresh</b> <b>Refresh.</b> Refreshes the display. The button is disabled in the Page Filter component.         </li> <li>  <b>Open in a New Window</b> <b>Open in a New Window.</b> Opens the component in a new window.         </li> </ul>
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <a href="#">here</a> in <b>Click Here to configure</b> in the center of the component</p>
	<p>Opens the online documentation page relevant to the component you are currently configuring.</p>
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>
	<p>Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.</p>
	<p><b>Remove Component.</b> Removes the component from the page.</p>



## Web Intelligence Report Viewer - Configure Component Dialog Box



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

UI Element	Description
<Report List>	Select the BO report you want to display in the Web Intelligence Report Viewer component. For details about the reports, see <a href="#">Getting Started with Reports</a> in the <i>IT Executive Scorecard Reports Reference Guide</i> .

# The Web Intelligence Static Report Viewer Component

The Web Intelligence Static Report Viewer component enables the user to view a selected BO report. You can create your own BO reports and display them in the Dashboard using the Web Intelligence Static Report Component Viewer component.

**Note:** You cannot wire a Web Intelligence Static Report Viewer component with a Page Filter component in a Dashboard page.

## To access:

You can view the report in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on the next page](#) ● ["UI Description" on page 309](#)

## Learn More

- A Web Intelligence Static Report Component Viewer component displays only one BO report. If you want to display more than one BO report in the Dashboard, you can create multiple Web Intelligence Static Report Component Viewer components and rename each component.
- You can create your own BO reports using BO and display them in the Web Intelligence Reports Static Viewer component. For details, see BO documentation.

**Note:** To view a list of the available Xcelsius reports, you must copy the reports **.swf** files to the following location:  
**<installation directory>\agora\xcelsius** folder.

- The component analyzes the original BO report and returns tables and graphs. The tables become tables in html format, the graphs become images in the Web Intelligence Static Report Component Viewer component. The structure of the original BO report may also be changed as tables are moved to the beginning of the Web Intelligence Static Report Component Viewer component display and graphs are moved to the end of the component display.
- The size of Web Intelligence reports can impact how the reports are displayed in the Dashboard page. The sizes are 374 pixels (width) x 199 pixels (height), 583 pixels (width) x 204 pixels (height), or 374 pixels (width) x 324 pixels (height). The description of each Web Intelligence report includes its size. For details, see ["Web Intelligence Reports and Operational Reports" on page 347](#) in the *IT Executive Scorecard Reports Reference Guide*.

## Tasks



**Main task:** ["Dashboard Display" on page 185](#)

This section includes the following tasks:


["Add a Component to a Dashboard Page" below](#)

### Add a Component to a Dashboard Page

To add a component to a page that is already formatted:

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

Note that double-click only works if you open the Component Gallery from the layout itself and not from the toolbar.

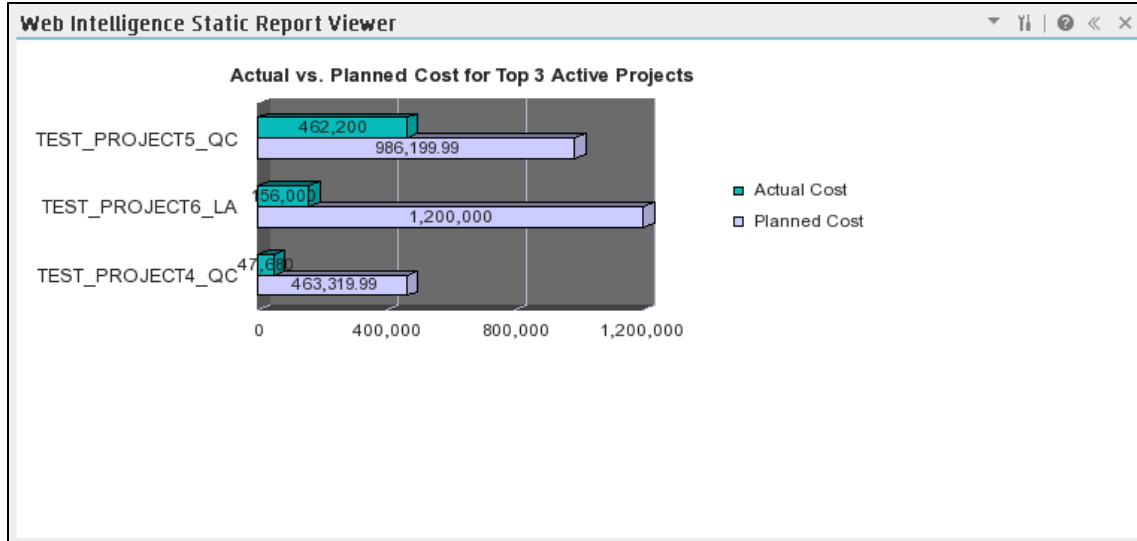
- If the target area is hidden by the Component Gallery dialog box, click the Component Gallery dialog box title bar and drag it to another location on your screen.
  - If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of the target area, and not to the part of the component that is colored white.
4. Close the Component Gallery page. For user interface details, see ["Component Categories" on page 209](#).
  5. In the component, click the **Configure Component**  button or click **here** in **Click Here to configure** in the center of the component.
  6. In the component Filter dialog box that opens, select the information you want to display and click **OK**.

The component displays the required information.

For more information, see ["Page Layout and Components" on page 194](#).





## UI Description







### Web Intelligence Static Report Component Viewer (Display)



### Component Toolbar

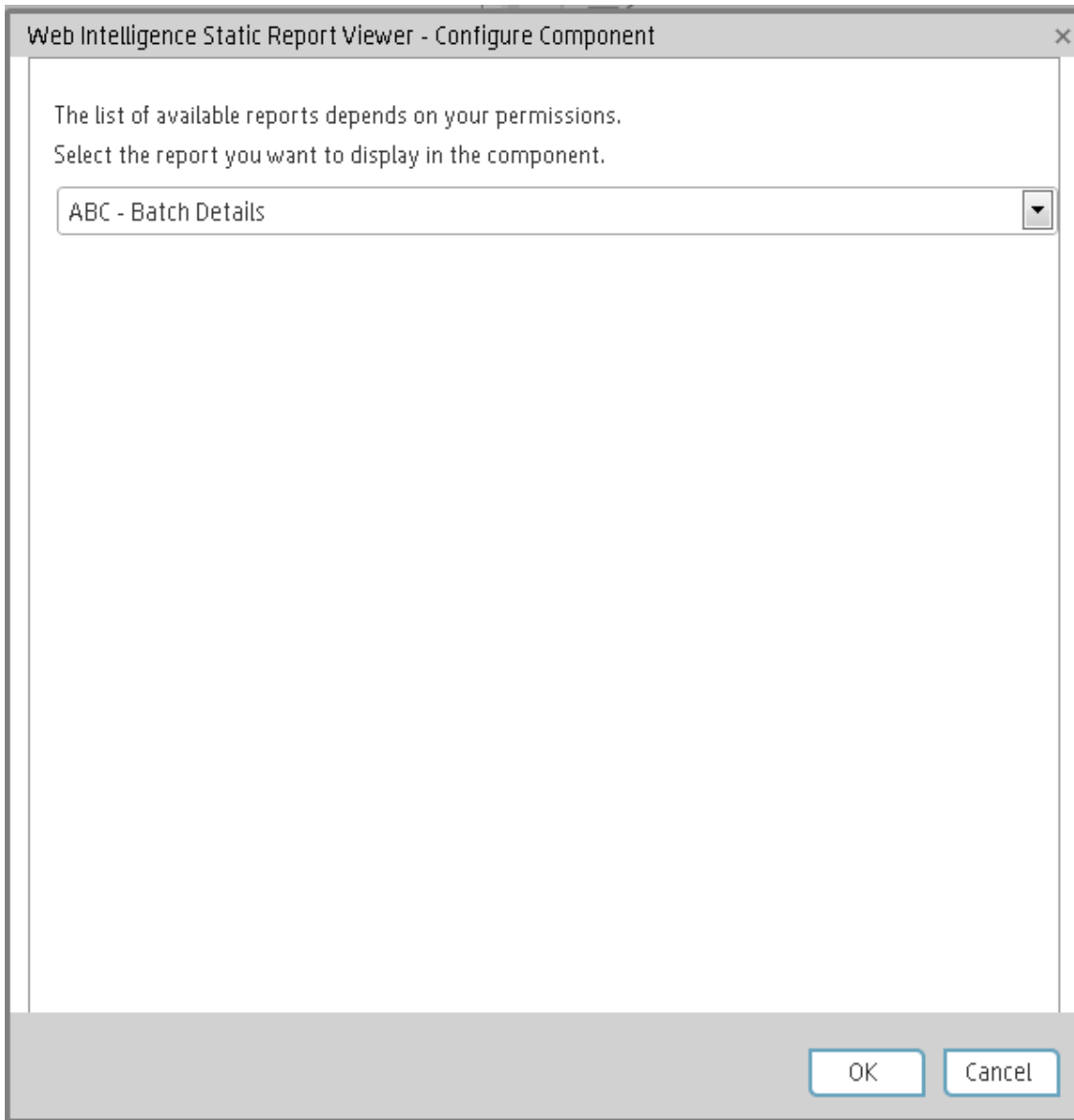
User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets>):

UI Element	Description
▼	<p><b>Component Menu.</b> Opens a menu where you can select:</p> <ul style="list-style-type: none"> <li>  <b>Preferences</b> <b>Preferences.</b> Depending on the component you are current configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>. </li> <li>  <b>Wiring</b> <b>Wiring.</b> Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see <a href="#">"Wiring Between Components" on page 338</a>. </li> <li>  <b>Refresh</b> <b>Refresh.</b> Refreshes the display. The button is disabled in the Page Filter component. </li> <li>  <b>Open in a New Window</b> <b>Open in a New Window.</b> Opens the component in a new window. </li> </ul>

UI Element	Description
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <b>here</b> in <b>Click Here to configure</b> in the center of the component</p>
	Opens the online documentation page relevant to the component you are currently configuring.
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
	<b>Remove Component.</b> Removes the component from the page.

### Web Intelligence Static Report Component Viewer - Configure Component Dialog Box

This dialog box enables you to select the relevant report to be displayed in the Web Intelligence Static Report Component Viewer component.



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

UI Element	Description
<Report List>	Select the BO report you want to display in the Web Intelligence Static Report Component Viewer component. For details about the reports, see <a href="#">Getting Started with Reports</a> in the <i>IT Executive Scorecard Reports Reference Guide</i> .

# Webi Report Categories

In the Central Management Console (CMC) application you can manage Categories. A Category flag provides the option to assign each metric to the relevant categories. The categories are useful to classify the different Webi reports in the list of reports to be added to a component in Dashboard. For example, you can add a category per business context, ALM, Asset, and more.

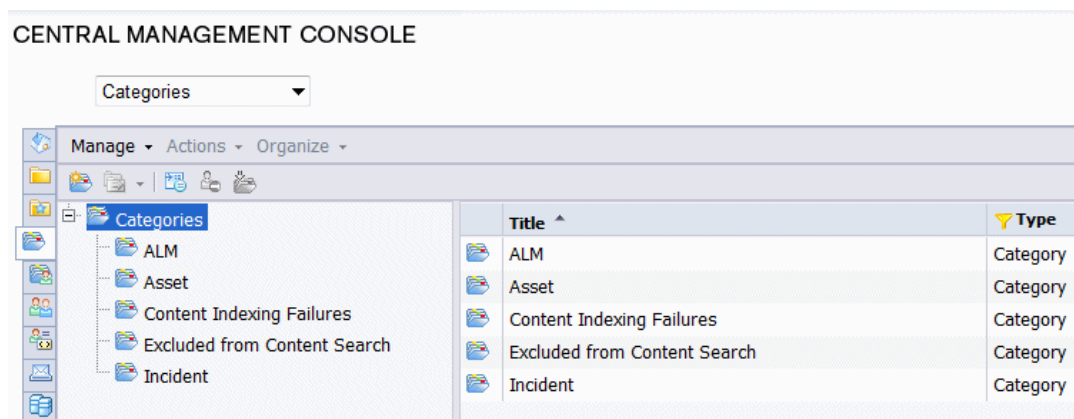
## To access:

Access the Central Management Console console.

## Tasks

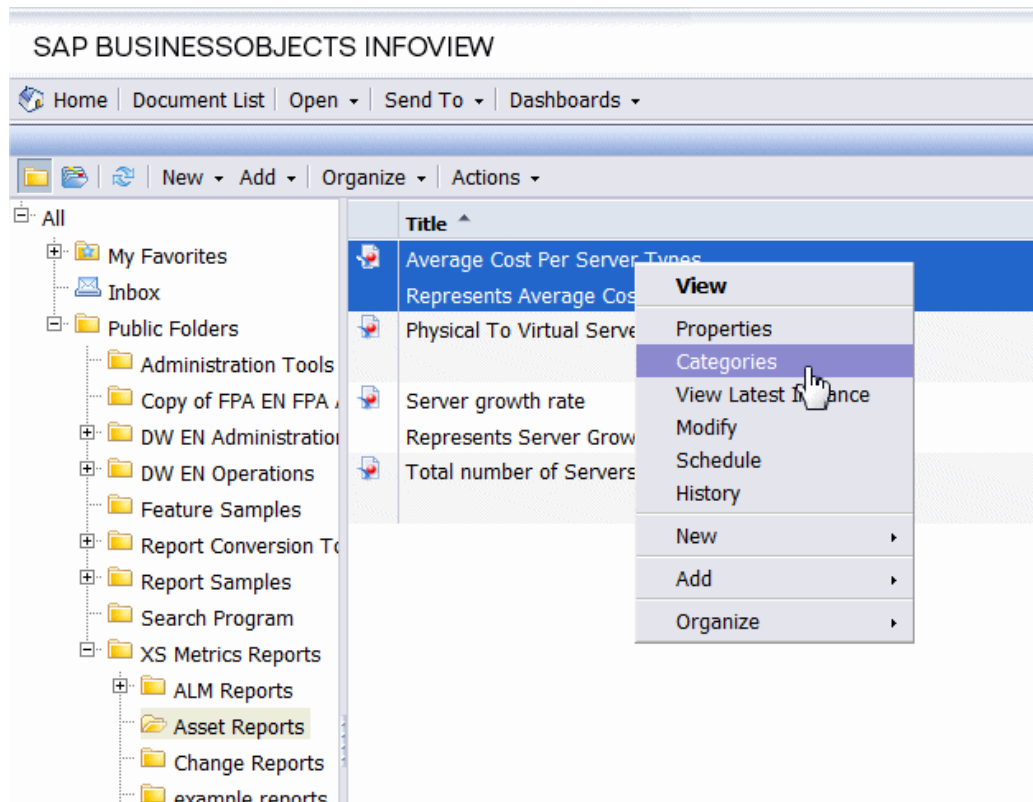
### Create categories

1. Access the Central Management Console console.
2. Create the categories:

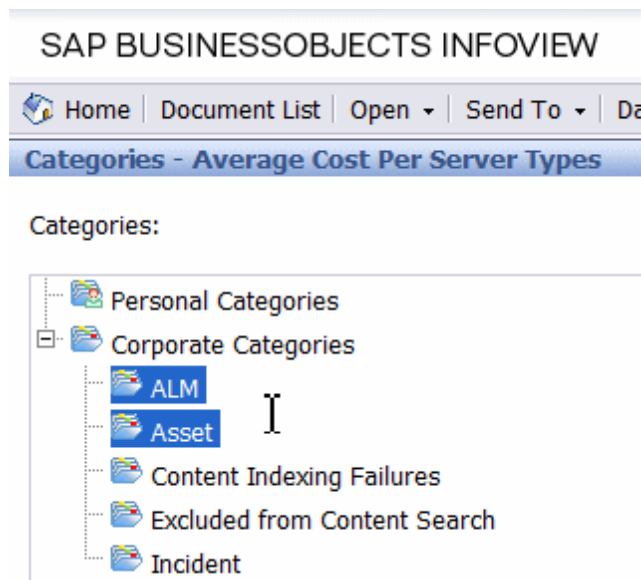


3. You can now associated metrics (reports) and categories. You can assign more than one category to a report.

- a. Right-click the relevant Webi report.



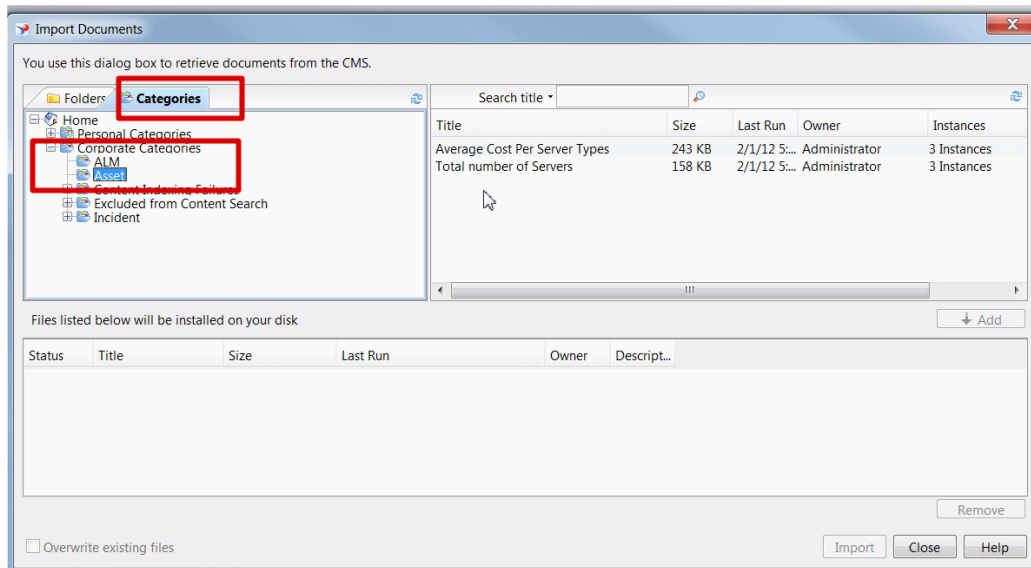
- b. Select the relevant categories for the selected report, and click **OK**



- c. Launch the Web Intelligence Rich Client, then click **File> Import from CMS**.



- d. When you open the “Web Intelligence Rich Client” you can see all the Webi reports that are relevant to the specific category.



# The SWF Report Viewer Component

The SWF Report Viewer component enables the user to view the selected SWF file from Xcelsius or from other sources.

**Note:** You cannot wire a SWF Reports Viewer (Flash) component with a Page Filter component in a Dashboard page.

## To access:

You can view the report in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** • ["Learn More" below](#) • ["Tasks" below](#) • ["UI Description" on page 317](#)

## Learn More

A SWF Report Viewer component displays only one SWF file. If you want to display more than one SWF file in the Dashboard, you can create multiple SWF Report Viewer components and rename each component.

SWF files have a **.swf** suffix.



**Note:** To view a list of the available SWF files, you must copy the reports **.swf** files to the following location:  
<installation directory>\agora\xcelsius folder.

## Tasks


**Main task:** ["Dashboard Display" on page 185](#)

### Add a Component to a Dashboard Page

To add a component to a page that is already formatted:

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

Note that double-click only works if you open the Component Gallery from the layout itself and not from the toolbar.

- 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 page. For user interface details, see "[Component Categories](#)" on [page 209](#).
  5. In the component, click the **Configure Component**  button or click **here** in **Click Here to configure** in the center of the component.
  6. In the component Filter dialog box that opens, select the information you want to display and click **OK**.

The component displays the required information.

For more information, see "[Page Layout and Components](#)" on [page 194](#).

#### **Point to the named instance when Executive Scorecard is installed on an SQL Server named instance**

When Executive Scorecard is installed on an SQL Server named instance, and if the SWF file was created by Xcelsius and is running on SAP BusinessObjects Enterprise content, the relevant universe (Context) connection must be updated to point to the <sql server name>\<named instance>.

To point to the named instance use the following steps:










1. Open the SAP BusinessObjects Enterprise Designer application on the SAP BusinessObjects Enterprise server.
2. Click **Tools > Connections** to display the connection list.
3. Select **XS\_DWH\_JDBC** and click **Edit**.
4. In the **Server** field enter <sql server name>\<named instance>:1433.
5. Click **Next** and then **Finish**.
6. Click **File > Export**, and then click **OK**.
7. Run a report to see if it works



## UI Description

### SWF Report Viewer Component

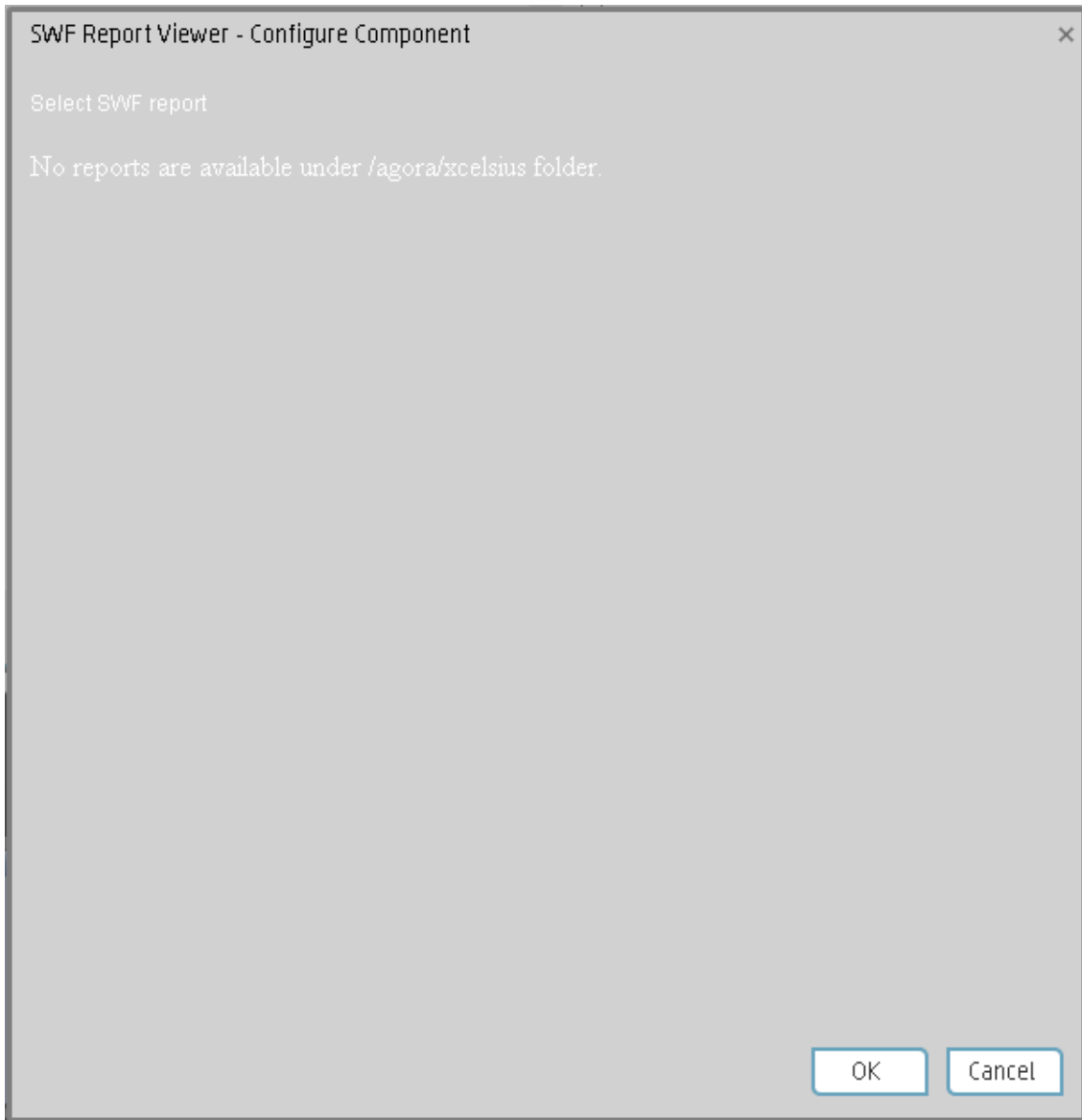
#### Component Toolbar

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

UI Element	Description
	<p><b>Component Menu.</b> Opens a menu where you can select:</p> <ul style="list-style-type: none"> <li data-bbox="542 657 1385 846">  <b>Preferences</b> <b>Preferences.</b> Depending on the component you are current configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>.         </li> <li data-bbox="542 884 1385 1031">  <b>Wiring</b> <b>Wiring.</b> Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see "<a href="#">Wiring Between Components</a>" on page 338.         </li> <li data-bbox="542 1068 1385 1152">  <b>Refresh</b> <b>Refresh.</b> Refreshes the display. The button is disabled in the Page Filter component.         </li> <li data-bbox="542 1190 1385 1274">  <b>Open in a New Window</b> <b>Open in a New Window.</b> Opens the component in a new window.         </li> </ul>
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <a href="#">here</a> in <b>Click Here to configure</b> in the center of the component</p>
	<p>Opens the online documentation page relevant to the component you are currently configuring.</p>
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>

UI Element	Description
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
	<b>Remove Component.</b> Removes the component from the page.

### SWF Report Viewer - Configure Component Dialog Box



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

UI Element	Description
<Report List>	Select the SWF file you want to display in the SWF Report Viewer component.

# The Xcelsius Reports Viewer (Flash) Component

One of these components, the Xcelsius Reports Viewer Component enables the user to view the selected Xcelsius report when the report is in Flash format.

You can also view the report in SAP BusinessObjects Enterprise.

## To access:

You can view the report in the relevant page in the Dashboard.

To configure the component click the **Configure Component**  button in the component to display the component filter, or click **here** in **Click Here to configure** in the center of the component.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" below](#) ● ["UI Description" on page 323](#)

## Learn More

- An Xcelsius Reports Viewer (Flash) component displays only one Xcelsius report. If you want to display more than one Xcelsius Reports Viewer (Flash) component in the Dashboard, you can create multiple Xcelsius Reports Viewer (Flash) components and rename each component.
- Out-of-the-box Xcelsius reports in Flash format are automatically installed during the installation of Executive Scorecard:
  - **Project cost reduction.** This report presents all projects actual cost and budget along with the associated requirements including a “what if scenario” to calculate the reduced number of requirements as a result of cost reduction. For details, see [Project Cost Reduction](#) in the *IT Executive Scorecard Reports Reference Guide*.
  - **KPI Audit.** This report lists all the active calculated KPIs and detailed KPI data, ordered by Business Contexts. For details, see [KPI Audit](#) in the *IT Executive Scorecard Reports Reference Guide*.
  - **Breakdown View.** This report lists all the active calculated KPIs and detailed KPI data, ordered by calculation status, status, and periodicity. For details, see [Breakdowns Report](#) in the *IT Executive Scorecard Reports Reference Guide*.

## Tasks

**Main task:** ["Dashboard Display" on page 185](#)

This section includes the following tasks:

["Prerequisite - Make sure the Xcelsius component works properly" on the next page](#)

["Add the Component to a Dashboard Page" on page 322](#)

"Create your own Flash report to be displayed in the Xcelsius Reports Viewer (Flash) Component" on page 323

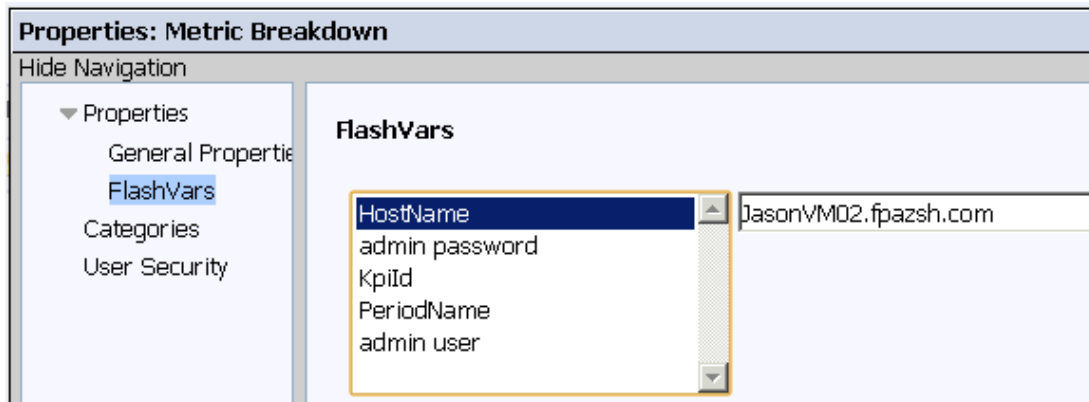
### Prerequisite - Make sure the Xcelsius component works properly

To ensure that the Xcelsius reports work properly:

- Add the **crossdomain.xml** file to the **C:\Program Files (x86)\Business Objects\Tomcat55\webapps\ROOT** directory so the web service runs properly mainly in distributed installations. The file contents are as follows:

```
<?xml version="1.0"?>
<!DOCTYPE cross-domain-policy SYSTEM "http://www.macromedia.com/xml/dtds/cross-domain-policy.dtd">
<cross-domain-policy>
<site-control permitted-cross-domain-policies="all" />
<allow-access-from domain="*" secure="false"/>
<allow-http-request-headers-from domain="*" headers="*" secure="false"/>
</cross-domain-policy>
```

- Configure the **HostName** and **admin password** of the report you want to add to the Xcelsius Report Viewer component, in the **Properties > FlashVars** of the relevant report in BO. You can insert any user as long it is an administrator user. If you select a "simple user" make sure that this user has the rights to run Xcelsius/webi/ws (the verification is done in BOE CMC). Note that the FlashVars variables might be different for different reports.



- If the Flash file you created with Xcelsius does not fully occupy its frame in the Executive ScorecardDashboard component, use the following workaround (valid only when working with Chrome):
  - a. In the SAP BusinessObjects Enterprise server, open the **CSS.css** file in the **C:\Program Files (x86)\Business Objects\Tomcat55\webapps\OpenDocument\service** directory.

The first few rows are as follows:

```
body {
font-family:      Tahoma,Arial,Sans-Serif;
font-size:        0.8em;
```



```
background-color: #FFFFFF;  
margin: 0px;  
height:100%;  
overflow:hidden;  
}
```

- b. Change the background-color from white (#FFFFFF) to the background color of your Xcelsius report.

## Add the Component to a Dashboard Page

To add the component to a page:

1. Prerequisite:

The component contains two types of Xcelsius reports in the selection list:

- **Out-of-the-box reports** - Out-of-the-box reports need some adjustments in order to present data.
- **Self-developed reports** - Self-developed reports show data as is.




Out-of-the-box Xcelsius reports receive data from Webi reports (with the same name) and both types of reports are located in SAP BusinessObjects Enterprise in the following folders:

- **Public Folders > Xcelsius > DWH Data > Reports**
- **Public Folders > Xcelsius > DWH Data > SWF**
- **Public Folders > Xcelsius > XS Data > Reports**
- **Public Folders > Xcelsius > XS Data > SWF**

Out-of-the-box reports must include information about the SAP BusinessObjects Enterprise server name (host) and the password of the SAP BusinessObjects Enterprise Administrator enterprise user (the default user for the out-of-the-box Xcelsius reports).

To include that information, proceed as follows:

- a. Log on to SAP BusinessObjects Enterprise management console: **http://<server name>:8080/CmcApp**
- b. Right-click each relevant **.swf** file (**Folders > Xcelsius > DWH Data > SWF** or **Folders > Xcelsius > XS Data > SWF**), and select **Properties**.
- c. In the **Properties** dialog box, select **Flash vars**, click **host**, enter the name of the SAP BusinessObjects Enterprise server, and save.

- d. In the **Administrator password** parameter enter the password of the SAP BusinessObjects Enterprise administrator user (default user for every SAP BusinessObjects Enterprise installation).
  - e. Do not touch the other parameters if there are any.
  - f. Save.
2. 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).
  3. Click the **Component Gallery**  button.
  4. 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. For user interface details, see "[Component Categories](#)" on page 209.
    - 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.
  5. In the component, click the **Configure Component**  button, or click **here** in **Click Here to configure** in the center of the component.
  6. In the component Filter dialog box that opens, select the information you want to display and click **OK**.
  7. The component displays the required information.

## Create your own Flash report to be displayed in the Xcelsius Reports Viewer (Flash) Component

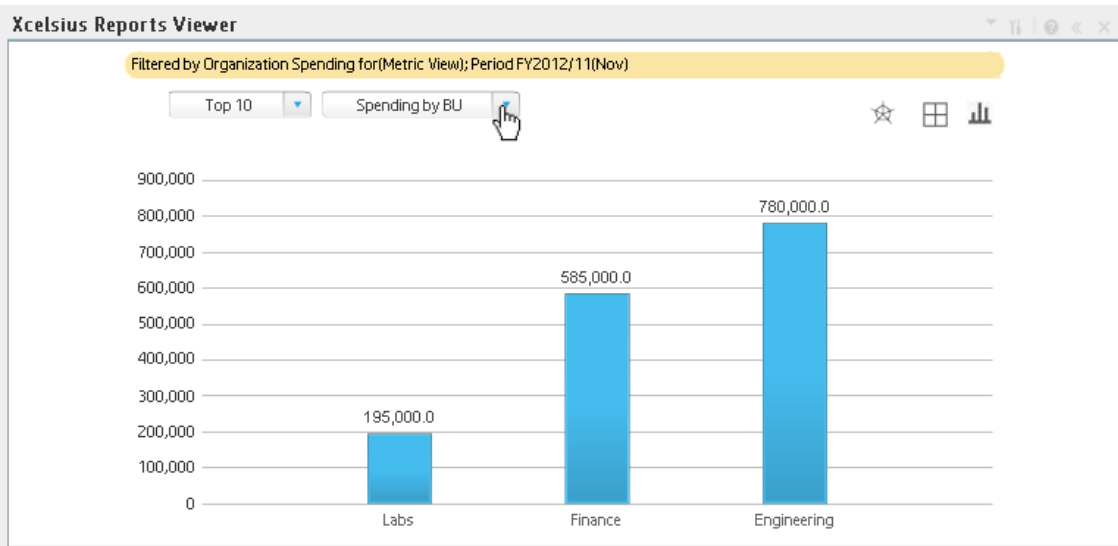
Create your Flash report in Xcelsius and make sure that:

- The parameters you add to the Flash report in Xcelsius have an **<entity>:<dimension>** format. These parameters are used as prompt parameters for the report.
- The report that you create to be displayed in Flash format must include a prompt with the **<entity>:<dimension>** format.

## UI Description






### Xcelsius Reports Viewer (Flash) Component







This is an example of the Xcelsius report viewer with a Metric Breakdown report.



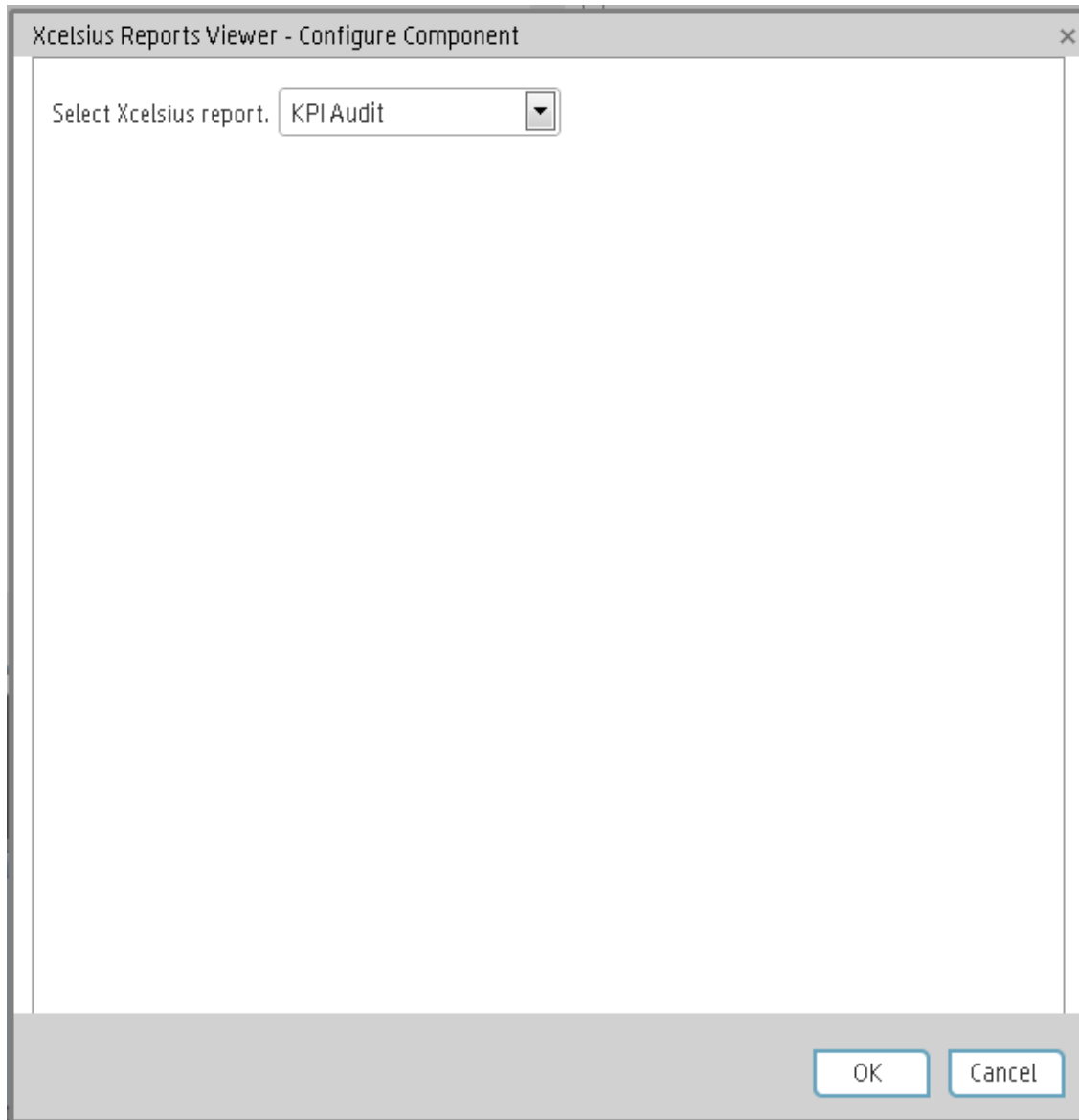
## Component Toolbar

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

UI Element	Description
	<p><b>Component Menu.</b> Opens a menu where you can select:</p> <ul style="list-style-type: none"> <li>  <b>Preferences</b> <b>Preferences.</b> Depending on the component you are current configuring, opens the <b>&lt;component_name&gt; Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b>. </li> <li>  <b>Wiring</b> <b>Wiring.</b> Depending on the component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For details, see <a href="#">"Wiring Between Components" on page 338</a>. </li> <li>  <b>Refresh</b> <b>Refresh.</b> Refreshes the display. The button is disabled in the Page Filter component. </li> <li>  <b>Open in a New Window</b> <b>Open in a New Window.</b> Opens the component in a new window. </li> </ul>

UI Element	Description
	<p><b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.</p> <p><b>Note:</b> You can also click <b>here</b> in <b>Click Here to configure</b> in the center of the component</p>
	Opens the online documentation page relevant to the component you are currently configuring.
	<p><b>Collapse component.</b> Collapses the component.</p> <p>To expand the collapsed component, click the  button on the collapsed component.</p>
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
	<b>Remove Component.</b> Removes the component from the page.

### Xcelsius Reports Viewer (Flash) - Configure Component Dialog Box



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

UI Element	Description
<Report List>	<p>Select the Xcelsius Report in Flash format you want to display in the Xcelsius Reports Viewer (Flash) component.</p> <p>For details, see <a href="#">KPI Audit</a>, <a href="#">Metric Breakdown Report</a>, <a href="#">Project Cost Reduction</a>, and <a href="#">System Health Report</a>.</p> <p><b>Note:</b> To display data in the Metric Breakdown report in an Xcelsius component or in a Metric Breakdown component, you must add the Historical Metric View component to the page . When you click the graph of a specific Metric in the Historical Metric View component, the list of its Metric Breakdowns is displayed in the Metric Breakdown report list. You can then display the relevant Metric Breakdown information.</p>

# Customized Static or Dynamic URL Component

You can use a static URL, where the component simply opens the URL that you enter. You can also create a dynamic URL, where the component URL responds to other components on the page.

**To access:**

In the Component Gallery, click the **Add External Component**  button or select a component and click the **Edit Component Properties**  button.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" below](#) ● ["UI Description" on page 330](#)

## Learn More

**Note:** The URL for an external component must begin with one of the following: **https://**, **http://**, or **ftp://**.

## Tasks




**Main task:** ["Dashboard Display" on page 185](#)

This section includes:

["Create a simple URL component" below](#)

["Create a dynamic URL" below](#)


### Create a simple URL component



1. In the Dashboard, click the **Component Gallery**  button in the Dashboard toolbar, or in an empty component of the Dashboard, click the **Add Component**  button.
2. In the Component Gallery dialog box that opens, click the **Add External Component**  button.
3. In the New Component dialog box that opens, enter the name, URL, and description, and click **OK**.
4. Optionally. In the Categorize Component area, select one or more categories to which you want the component assigned.

The new component is added to the Component Gallery, and can then be added to any page.

### Create a dynamic URL

1. In the Dashboard, click the **Component Gallery**  button in the Dashboard toolbar, or in an

empty component of the Dashboard, click the **Add Component**  button.

2. In the Component Gallery dialog box that opens, click the **Add External Component**  button.
3. In the New Component dialog box that opens, enter a name for the component and the static portion of the URL.
4. Optionally. In the **Categorize Component** area, select one or more categories to which you want the component assigned.
5. In the **Wiring Context** area, select one or more contexts whose attributes can be used to define the URL pattern.
6. In the **URL Parameters and Values** area, click the **New Parameter**  button.
7. In the **New Parameter** dialog box that opens select the URL Part (the area of the URL where you want to add the parameter), and the name of the parameter, and click **OK**. The parameter is added to the **URL Parameter and Value** table.
8. Drag the relevant attribute from the **Attributes** list. The attributes displayed in the list are based on the contexts you selected in the Wiring Context area.  
The **URL Pattern** area shows the dynamic URL you have built, using the static URL in the upper area of the dialog box, and the URL parameters that you defined.
9. Click **OK** to save the component.

The new component is added to the Component Gallery, and can then be added to any page.



## UI Description

### New/Edit Component Dialog Box

New Component

Enter a URL and define parameters for every context you want to use, to create the URL pattern

\*Name :

\*URL :

Description :

Display last update label

▶ Categorize Component

▼ Configure Wiring

Wiring Context +

No items to display.

URL Parameters

OK Cancel Help

#### <Upper Pane>

User interface elements are described below:

UI Element	Description
	<b>Refresh.</b> If you have edited the static part of the URL, click refresh to update the URL pattern below.
<b>Name</b>	Enter the name you want to assign to the component.

UI Element	Description
URL	<p>Enter the URL of the component.</p> <p>If you are creating a dynamic URL using parameters, enter the static part of the URL here.</p> <div style="background-color: #f0f0f0; padding: 5px;"> <p><b>Example</b> The URL to search for the string <b>hp</b> in Google.com uses the following format: <b>http://www.google.com/search?q=hp</b>. The static part of this URL is the section before the question mark: <b>http://www.google.com/search.</b></p> </div>
Description	The description of the component.

### Categorize Component Area

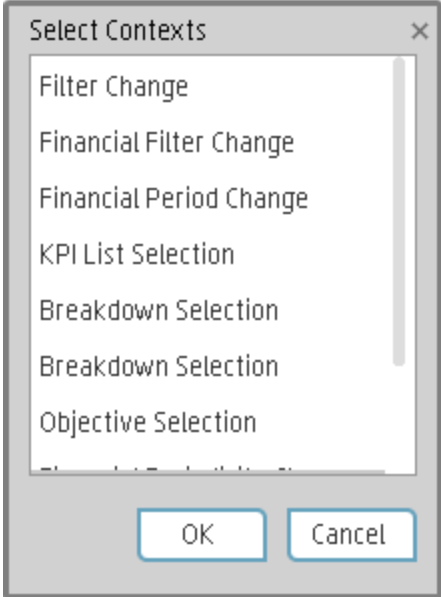

Click on the drop down element to display a list of the existing categories. You can select one or more categories. You can also create new categories. For details, see the Left Pane section of user interface in the "[Component Categories](#)" on page 209.

### Configure Wiring

This area enables you to select one or more contexts whose attributes are used to define the URL pattern.

User interface elements are described below:

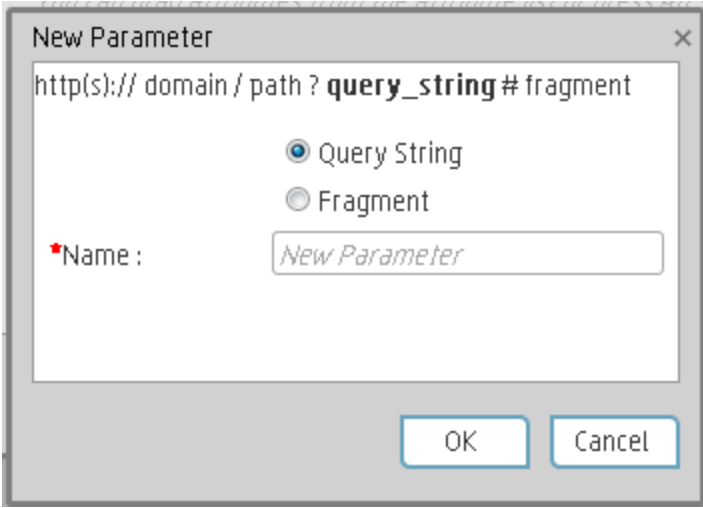
UI Element	Description
Wiring Context	Lists the wiring contexts you have already configured. Each line represents a context whose attributes can be used to create the URL pattern.

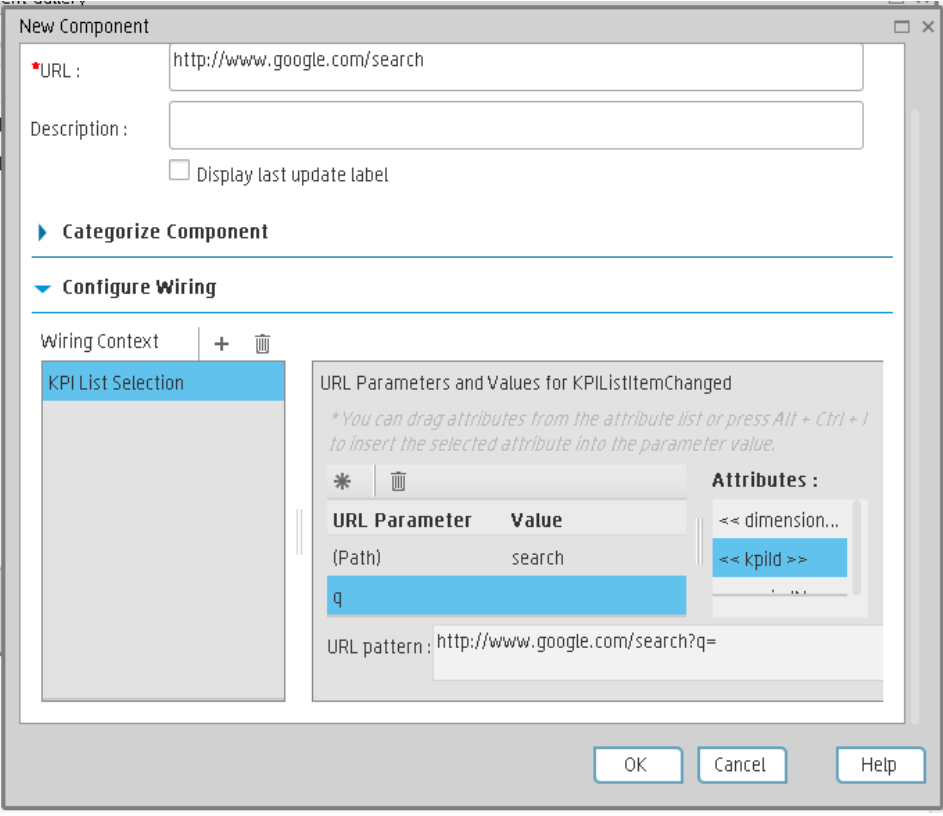

UI Element	Description
+	<p><b>Add Context.</b> Click to add a context whose attributes can be used to define the URL pattern.</p> <p>You must enter a URL in the URL box before you click the <b>Add Context</b> button.</p> <p>The Select Contexts dialog box enables you to select which context to add.</p>  <p>You can select:</p> <ul style="list-style-type: none"><li>• <b>KPI List Selection.</b> The context is sent to the target component, when you select a KPI in the source component.</li><li>• <b>Objective Selection.</b> The context is sent to the target component, when you select an Objective in the source component.</li></ul>
	<p><b>Remove.</b> Select a wiring context and click the button to remove it from the list.</p>

### URL Parameters and Values Area for KPI List Selection or Objective Selection

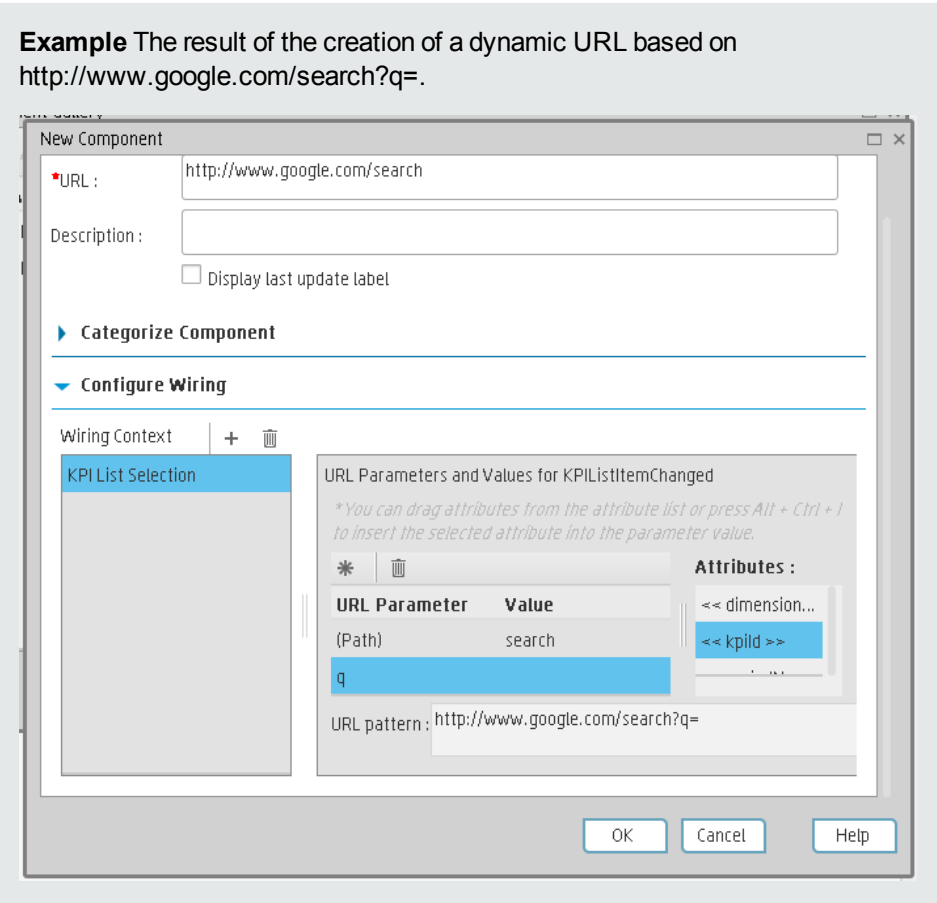
This area enables you to add URL parameters and values to build the URL pattern, using wiring context attributes.

User interface elements are described below:

UI Element	Description
*	<p><b>New Parameters.</b> Click to add a URL parameter. Select the area of the URL where you want to add the parameter in the <b>URL Part</b>:</p> <p><b>Path.</b> The parameter is used in the path part of the URL.</p> <p><b>Query String.</b> The parameter is used in the query string of the URL.</p> <p><b>Fragment.</b> The parameter is used in the rest of the URL.</p> <p>Type the parameter name in the <b>Name</b> box in the URL Parameters dialog box that appears.</p> <div data-bbox="435 674 1133 1178" data-label="Image"></div> <p><b>Example</b> To create a dynamic URL based on <a href="http://www.google.com/search?q=hp">http://www.google.com/search?q=hp</a>, add a URL parameter named q.</p>

UI Element	Description
	
	<p><b>Remove.</b> Select a URL parameter and click this button to remove it from the list.</p>
<p><b>URL Parameter and Value</b></p>	<p>Lists the URL parameters you have already configured.</p> <p>Each line represents the name of a URL parameter which is used to create the URL pattern, and its value. After defining a parameter name, drag an attribute from the <b>Attributes</b> area to the <b>Value</b> area of the URL parameter.</p> <p>To edit a parameter value, click the value itself and edit its contents.</p>

UI Element	Description
<b>Attributes</b>	<p>This contains a list of the attributes that can be used to build the URL pattern. This list is dependent on the contexts you select in the Wiring Context area.</p> <ul style="list-style-type: none"><li>• If you select KPIChange in the Wiring Context area, the attribute <b>&lt;&lt;kpid&gt;&gt;</b> is available to build your URL pattern. The parameter represents the ID of the KPI on which you click in the source component to run the external URL with the ID of the KPI as a parameter.</li><li>• If you select ObjectiveChanges in the Wiring Context area, the attributes <b>&lt;&lt;id&gt;&gt;</b> and <b>&lt;&lt;type&gt;&gt;</b> are available to build your URL pattern. The <b>&lt;&lt;id&gt;&gt;</b> parameter represents the ID of the Objective and the <b>&lt;&lt;type&gt;&gt;</b> parameter represents the type of the Objective on which you click in the source component to run the external URL with the ID of the KPI as a parameter.</li></ul> <p>To use an attribute as the value of a URL parameter, drag the attribute from this area to the Value area of the parameter.</p>

UI Element	Description
<b>URL Pattern</b>	<p>This shows the URL pattern that was built using the static URL that you entered in the URL field, and the URL parameters that you defined in the URL Parameters area.</p> <p><b>Example</b> The result of the creation of a dynamic URL based on <code>http://www.google.com/search?q=</code>.</p>  <p>The screenshot shows a 'New Component' dialog box. At the top, the 'URL' field contains 'http://www.google.com/search'. Below it is a 'Description' field and a checkbox for 'Display last update label'. The 'Configure Wiring' section is expanded, showing a 'Wiring Context' list with 'KPI List Selection' selected. To the right, a table titled 'URL Parameters and Values for KPIListItemChanged' is displayed. The table has two columns: 'URL Parameter' and 'Value'. The first row shows '(Path)' with the value 'search'. The second row shows 'q' with the value 'search'. Below the table, the 'URL pattern' is shown as 'http://www.google.com/search?q='. To the right of the table is an 'Attributes' list containing '&lt;&lt; dimension...' and '&lt;&lt; kpild &gt;&gt;'. At the bottom of the dialog are 'OK', 'Cancel', and 'Help' buttons.</p>



# Wiring Between Components

Dashboard is provided with default components. The default components are located in the Component Gallery.

You can also add external components. The external components are also located in the Component Gallery. For details, see "[Customized Static or Dynamic URL Component](#)" on page 328.

You can define the wiring between the components on a page. The wiring determines how components interact with one another. After you place components on a page, you can use define the source components that are to send contexts to target components.

## To access:

Click the **Wiring**  button located in the Dashboard toolbar.

**Section navigation:** ● "[Tasks](#)" below ● "[UI Description](#)" on page 342

## Tasks

### Set Up Wiring Between Components


Component wiring defines how the components on the same Dashboard page can interact with each other. When two components are wired and the first component sends a wiring context indicating what has changed in the first component, then the second component responds to this change.

**Example** The selection of one KPI in the KPI View component causes the display of the details of the same KPI in the Historical View component on the same page, if the two components are wired and the KPI View component is the source.

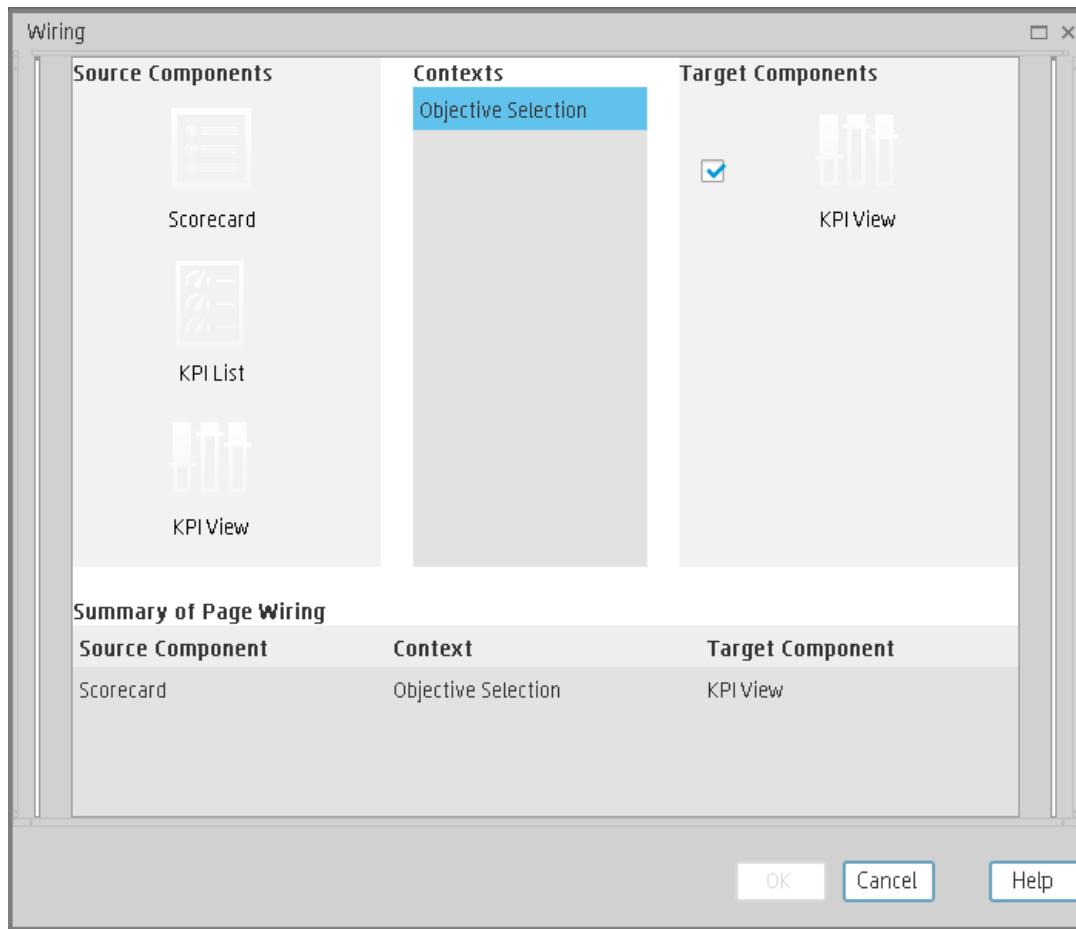
Note that if you select an Objective in the Scorecard component, the details of all the Objective's KPIs are displayed in the components that are wired to the Scorecard component on the same page.

Out-of-the-box pages have predefined wiring; you can also modify their default wiring definitions.

To configure the wiring between components on a page:


1. In Dashboard, open the relevant page, and click the **Wiring**  button in the Dashboard toolbar. The Wiring dialog box appears. For user interface details, see below. The Wiring button is usually disabled for out-of-the-box pages that are read-only.
2. The **Source Components** on the left side of the Wiring dialog box lists the components whose wiring context is to be sent to one or more target components. Select the relevant source component. For example, select Scorecard.
3. The **Contexts** box lists the contexts that can be sent from the selected source component. Select the relevant context. For example, select **Objective Selection**. For a list of the

contexts and their description, see below.

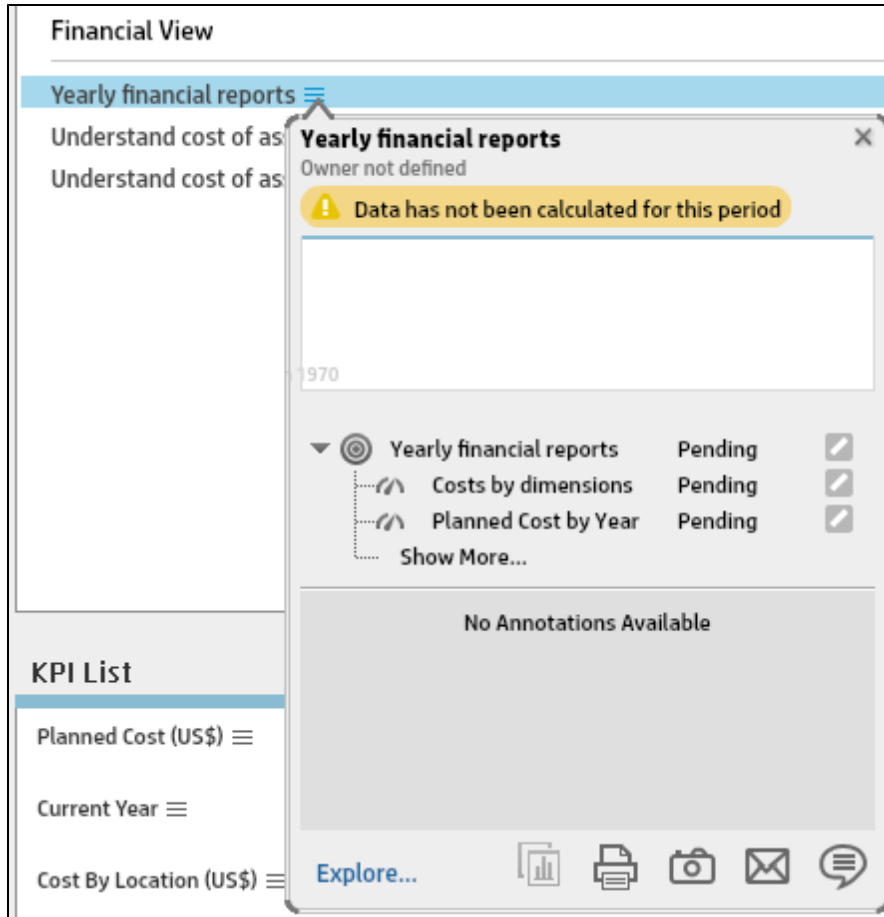


4. In the list of Target Components on the right side of the Wiring dialog box, select one or more component that will receive contexts from the source component. For example, select KPI View.
5. Click **OK**.

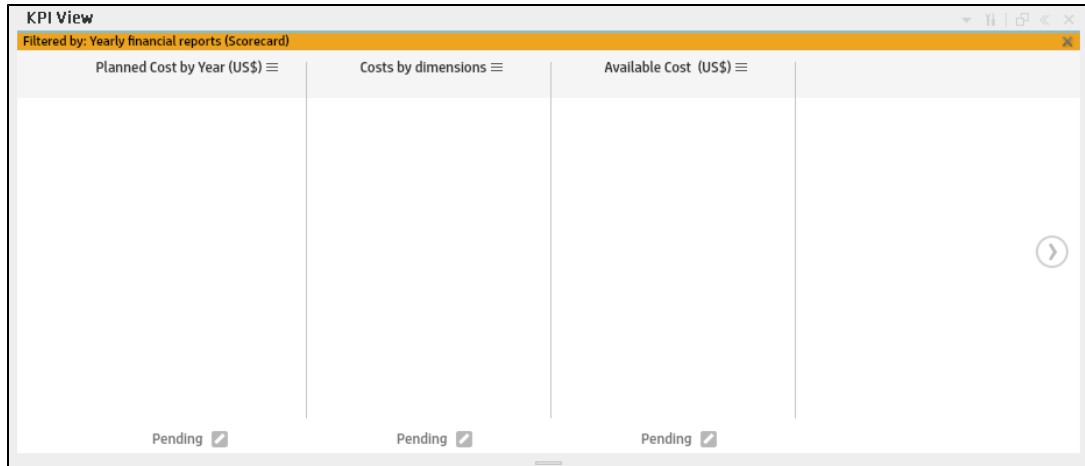
The **Summary of Page Wiring** area displays all of the wiring defined for the page.

6. In the Dashboard page, move the cursor over the  icon of the relevant objective in the Scorecard component. The tooltip displays the KPIs of the Objective, for example: **Costs by**

**dimensions.**



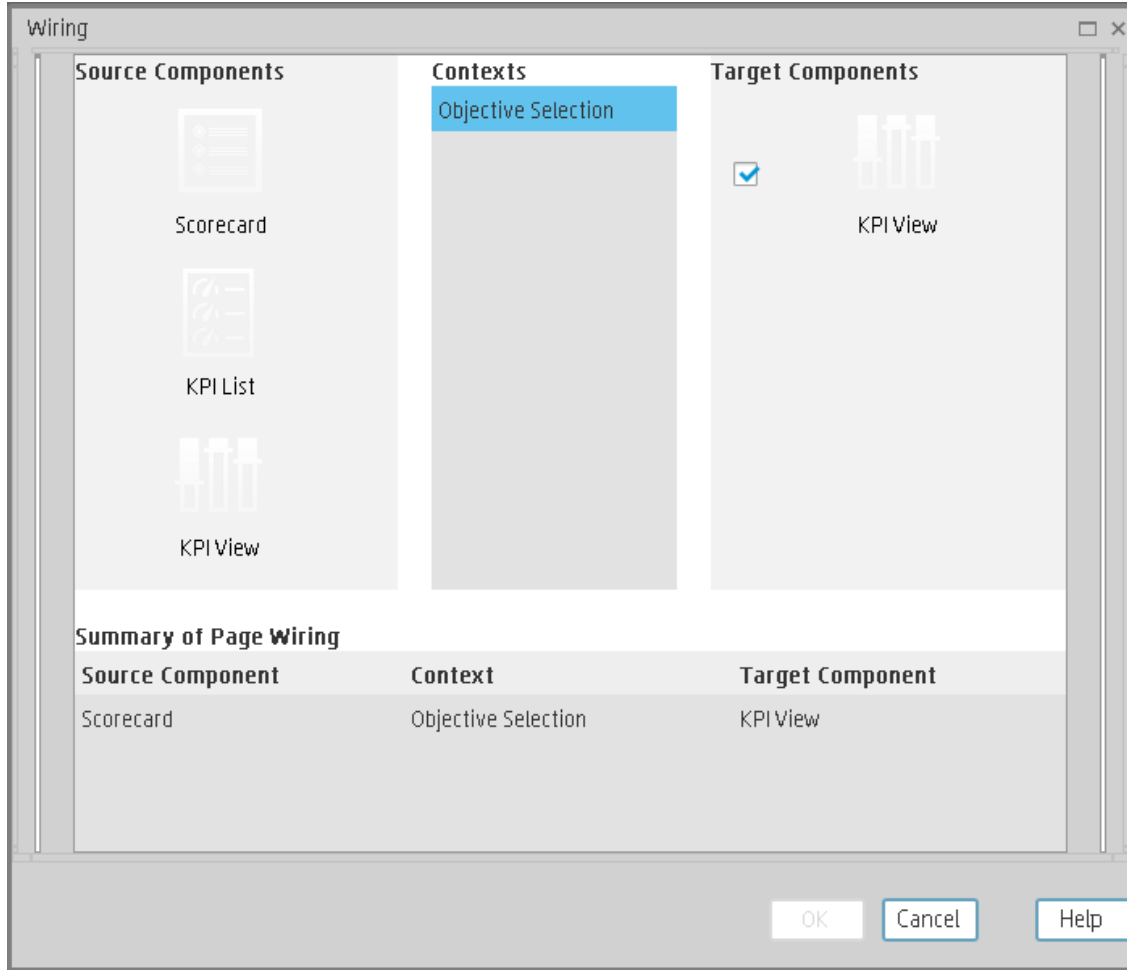
7. In the Scorecard component, click the relevant Objective. The KPI View component that is wired to the Scorecard component immediately refreshes to display the KPI View for the Objective's KPIs, for example: **Costs by dimensions**. In addition, the time period of the KPI View component is reset to the Scorecard time period. A message indicates that the display of the KPI View is wired to the Scorecard component.



8. To restore the original display of the KPI View component, click X on the yellow message.

## UI Description


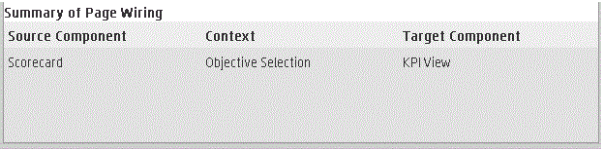
### Wiring Dialog Box



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

UI Element	Description
<b>Source components</b>	This column displays all of the page components that have the ability to send contexts to other components. Select a source component, then select the context and the target components.

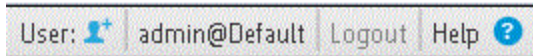
<b>Contexts</b>	<p>After you select a source component in the left column, the context box contains a list of the contexts that can be sent from this source to the target components.</p> <p>Select the context you want to send to one or more targets, and then select the target component.</p> <p>The contexts are:</p> <ul style="list-style-type: none"><li>• <b>KPI Selection.</b> When the user selects a KPI in the KPI Viewer component, a KPI Selection event is published. The Historical View component wired to the KPI Viewer component receives that event and its display is updated to show the selected KPI's history.</li><li>• <b>Objective Selection.</b> When the user selects an Objective in the Scorecard component, an Objective Selection event is published. The KPI Viewer component that is wired to the Scorecard component receives that event and update its display to show the details of Objective's children (Objectives, KPIs, or KPI Breakdowns).</li><li>• <b>Filter Change.</b> When the user selects another entity:dimension in the Page Filter component, a Filter Change event is published. Component that are wired to the Scorecard component receive that event and update their display to show the details of Objective's children (Objectives, KPIs, or KPI Breakdowns). The components that are wired to the Page Filter component are:<ul style="list-style-type: none"><li>■ KPI View</li><li>■ KPI List</li><li>■ KPI Rolodex</li><li>■ Pie Chart View</li><li>■ Historical View</li><li>■ Historical Metric View</li><li>■ Dimension Scoring</li><li>■ Web Intelligence Report Viewer</li><li>■ Xcelsius Reports Viewer</li></ul></li></ul>
-----------------	--

<b>Target components</b>	<p>This column displays all the page components that have the ability to receive contexts from other components on the page.</p> <p>After you select a source component and context, this displays all of the page components with the ability to receive this context from the specified source.</p> <p>Select one or more target components that can receive contexts from the source component by clicking the check box.</p>  <p>The screenshot shows a panel titled "Target Components". On the left, there is a checked checkbox. In the center, there are three vertical bars representing components. At the bottom, the text "KPI View" is visible.</p>						
<b>Summary of page wiring</b>	<p>This displays a summary of the wiring that has been defined for the page. Each line shows a source, the context it sends, and the target component receiving this context from this source.</p>  <p>The screenshot shows a table titled "Summary of Page Wiring". The table has three columns: "Source Component", "Context", and "Target Component". The first row contains the values "Scorecard", "Objective Selection", and "KPI View".</p> <table border="1"><thead><tr><th>Source Component</th><th>Context</th><th>Target Component</th></tr></thead><tbody><tr><td>Scorecard</td><td>Objective Selection</td><td>KPI View</td></tr></tbody></table>	Source Component	Context	Target Component	Scorecard	Objective Selection	KPI View
Source Component	Context	Target Component					
Scorecard	Objective Selection	KPI View					

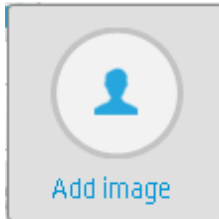
# Personalize the Dashboard

To add the user's picture to the Dashboard frame.

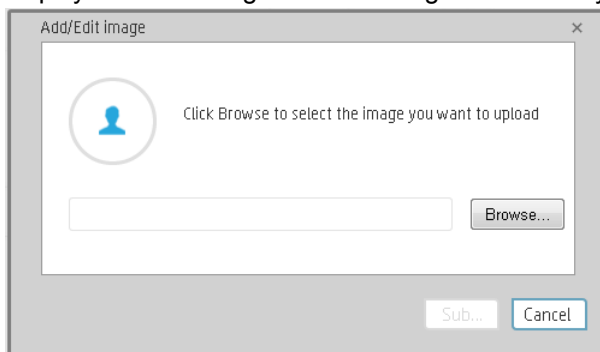
1. Move the cursor above the graphic next to **User:**



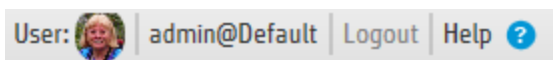
2. Click the **Add Image** button that is displayed.



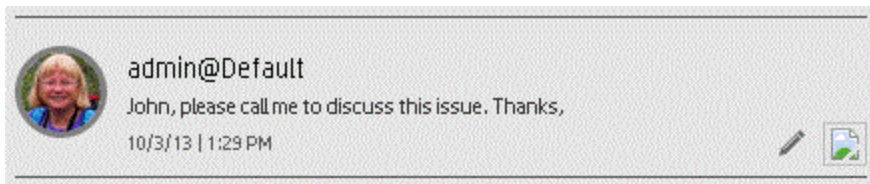
3. In the **Add/Edit image** dialog box that opens, locate the relevant picture. The image is displayed in the dialog box. The change is saved only when you click **Submit**.



The relevant picture is now displayed in the Dashboard frame.



It is also displayed in the annotations sent by the same user.



## Limitations

You can only upload images as follows:

- The size of the picture must be less than 5 MB.
- The allowed extensions are: .png, .jpg, .jpeg, .tiff, or .bmp



- For best display, the recommended image ratio is 3 x 4.

During the image upload, the image is automatically resized to 100 x 100 pixels and the size of the file is reduced.

# Web Intelligence Reports and Operational Reports

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

## To access:

In the Dashboard, add a Web Intelligence report or an operational report to a Web Intelligence component by configuring the component. For details, see ["Web Intelligence Report Viewer - Configure Component Dialog Box" on page 306](#) or ["Web Intelligence Static Report Component Viewer - Configure Component Dialog Box" on page 310](#) in the *IT Executive Scorecard Business Analyst Guide*.

The report is then displayed in these components in the Dashboard. For details, see ["Web Intelligence Report Viewer Component" on page 304](#) or ["Web Intelligence Static Report Component Viewer \(Display\)" on page 309](#) in the *IT Executive Scorecard Business Analyst Guide*.

**Section navigation:** ● ["Tasks" below](#) ● ["UI Description" below](#)

## Tasks

This section includes:

["Add a Web Intelligence report or an operational report to a Web Intelligence component" below](#)

["Display a Web Intelligence report or an operational report in a page" below](#)

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

In the Dashboard, add a Web Intelligence report or an operational report to a Web Intelligence component by configuring the component. For details, see ["Web Intelligence Report Viewer - Configure Component Dialog Box" on page 306](#) or ["Web Intelligence Static Report Component Viewer - Configure Component Dialog Box" on page 310](#) in the *IT Executive Scorecard Business Analyst Guide*.

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

After you have added a Web Intelligence report or an operational report to a Web Intelligence component by configuring the component, these reports are then displayed when these components are added to a page in the Dashboard. For details, see ["Web Intelligence Report Viewer Component" on page 304](#) or ["Web Intelligence Static Report Component Viewer \(Display\)" on page 309](#) in the *IT Executive Scorecard Business Analyst Guide*

## UI Description

The Web Intelligence report categories are:

- ["ALM Defect Reports" below](#)
- ["ALM Requirement Reports" on the next page](#)
- ["Web Intelligence Reports and Operational Reports" on the previous page](#)
- ["Asset Reports" on page 350](#)
- ["Change Reports" on page 350](#)
- ["Incident Reports" on page 350](#)
- ["Interaction Reports" on page 350](#)
- ["Project Reports" on page 351](#)
- ["Service Status Reports" on page 351](#)
- ["SLA Reports" on page 351](#)
- ["Studio Analysis Reports" on page 351](#)
- ["Operational Reports" on page 352](#)

## **ALM Defect Reports**

The ALM Defect reports are based on the business model taken from the HP Application Lifecycle Management data source. They provide information about the defects. The statuses and cycles that appear in the reports have been defined in Application Lifecycle Management.

The reports are:

- [Average Cycle Duration for Top 3 Active Projects Report131](#)
- [Average Defect Fix Duration for Urgent Severity by Project in Current Quarter Report132](#)
- [Average Fix Time per Defect for Top 3 Active Projects Report133](#)
- [Average Number of Cycles per Active Project Report134](#)
- [Defects Opened vs Closed for Active Project with Most Defects in Current Quarter Report](#)
- [Defects Opened vs Closed for Top 3 Active Projects in Current Quarter Report](#)
- [Defects Reopened per Severity for Top 3 Active Projects Report135](#)
- [Number of Defects per Status for Top 3 Active Projects Report136](#)
- [Number of Detected Defects per Cycle for Top 3 Active Projects Report137](#)
- [Number of Prolonged Defects for Top 3 Projects Report138](#)

- [Number of Reopened Defects by Cycle Report139](#)
- [Percentage of Non-Reproducible Defects for Top 3 Active Projects in Current Quarter Report140](#)
- [Percentage of Reopened Defects for Top 3 Active Projects Report141](#)
- [Total Fix Time per Project for Top 3 Active Projects Report142](#)

### **ALM Requirement Reports**

The ALM Requirement reports are based on the business model taken from the HP Application Lifecycle Management data source. They provide information about the requirements. The statuses and cycles that appear in the reports have been defined in Application Lifecycle Management.

The reports are:

- [Number of Open High Priority Requirements for Top 3 Projects Report143](#)
- [Number of Open Requirements per Type for Top 3 Projects Report144](#)
- [Number of Requirements per Cycle for Top 3 Projects in Current Quarter Report145](#)
- [Number of Requirements per Status for Top 3 Projects in Current Quarter Report146](#)

### **ALM Test Instance Reports**

The ALM Test Instance reports are based on the business model taken from the HP Application Lifecycle Management data source. They provide information about the tests that are created to test specific features and test instances that are run to test specific features in specific conditions. The statuses and cycles that appear in the reports have been defined in Application Lifecycle Management.

The reports are:

- [Average Delay in Test Instance Run for Top 3 Active Projects Report147](#)
- [Average Delay in Test Instance Run for Top 3 Cycles Report148](#)
- [Number of Cycles by Active Project Report149](#)
- [Number of Irrelevant Tests by Test Status Report150](#)
- [Number of Tests by Test Status for Top 3 Active Projects Report151](#)
- [Number of Tests by Test Status for Top 3 Cycles Report152](#)
- [Number of Tests by Test Type for Top 3 Active Projects Report153](#)
- [Number of Tests by Test Type for Top 3 Cycles Report154](#)
- [Percentage of Test Instances Linked to Defects for Top 3 Active Projects Report155](#)

- [Percentage of Test Instances Linked to Defects for Top 3 Cycles Report156](#)
- [Percentage of Tests Linked to Defects for Top 3 Active Projects Report157](#)
- [Percentage of Tests Linked to Defects for Top 3 Cycles Report158](#)

### **Asset Reports**

The Asset reports are based on the business model taken from the HP Asset Manager data source.

The reports are:

- [Average Cost Per Server Types Report262](#)
- [Physical to Virtual Server Ratio Report266](#)
- [Total Number of Servers Report261](#)
- [Server Growth Rate Report265](#)

### **Change Reports**

The Change reports are based on the business model taken from the HP Service Manager data source.

The reports are:

- [Emergency Changes by Services Report278](#)

### **Incident Reports**

The Incident reports are based on the business model taken from the HP Service Manager data source.

The reports are:

- [Critical Incidents by Customer Report258](#)
- [Critical Incidents for Top 3 Services Report291](#)
- [Incident Closure Time for the Top 3 Services Report309](#)
- [Number of Incidents Caused by Changes vs Total Number of Incidents Report287](#)
- [Percentage of Breached Incidents Report224](#)
- [Percentage of Incidents Attended by Service Report267](#)
- [Percentage of Service Requests Posted via Web \(Self-Help\) Report226](#)

### **Interaction Reports**

The Interaction reports are based on the business model taken from the HP Service Manager data source.

The reports are:

[High Priority Interactions by Customers Report296](#)

[Number of Interactions by Category Report260](#)

### **Project Reports**

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

The reports are:

- [Actual Project Efforts for Top 3 Services Report299](#)
- [Actual vs. Planned Cost for Top 3 Projects Report297](#)
- [Average Cost of Active Project by Location and Organization in Current Quarter Report](#)
- [Percentage of Time Spent on New Projects Report257](#)
- [Project Cost Allocation by Business Objective Report311](#)
- [Project Delay by Top 3 Most Costly Projects Report238](#)
- [Project Health for Active Projects Report298](#)

### **Service Status Reports**

The Service Status reports are based on the business model taken from the HP Service Manager data source.

The reports are:

- [Mean Time Between Failures for Top 3 Services Report310](#)

### **SLA Reports**

The SLA reports are based on the business model taken from the HP Service Manager data source.

The reports are:

- [SLA Not Met by Consumers Report276](#)
- [SLA Not Met by Services Report277](#)
- [Top 3 Services Suppliers Report259](#)

### **Studio Analysis Reports**

Use the Studio Analysis reports to analyze the contents of the Studio.

The reports are:

- [Active KPI Analysis](#)
- [Context Summary](#)
- [Context Summary Details](#)
- [Field Search in KPI and Context](#)
- [Field in KPI Formula](#)
- [KPIs per Context Report](#)
- [KPI Templates Report](#)
- [KPI Template Details Report](#)
- [KPI Tree Hierarchy Report](#)

### **Operational Reports**



The Operational reports are based on the business model corresponding to the KPI universe.

The reports are:

- [KPI Status Report](#)
- [Objective Status Report](#)

# View and Analyze the Business Objectives

You can view and analyze the business objectives you have set for your group as follows:

- In the relevant pages in Dashboard, and depending on your permissions, you can view and analyze the business objectives you set for yourself, your department, or your enterprise. This information is displayed in the relevant Scorecards and components. Once the Administrator has set up the relevant pages in Dashboard, you can view the information contained in the pages and analyze it using the capabilities described below. For details, see ["Dashboard" on the next page](#).
- From a Scorecard component in a page, move the cursor above the  icon at the end of the Objective's name to view over time information about the Objective, details about the Objective's KPIs and the annotations added to the Scorecard by users. From any other out-of-the-box component, moving the cursor above the  icon at the end of the KPI's name to view over time information about the KPI, its value, trend, and status, and the annotations added to the KPI by other users. For details, see ["First Level Navigation \(FLN\) for an Objective, a KPI, or a Metric" on page 365](#).
- The Explorer tab includes configuration details and historical information about the selected item and provides additional research, analytical, and data exploration capabilities. It allows a comprehensive understanding of the available data. The analytical capabilities focus around the Executive Scorecard main flow entities such as KPIs and Metrics and provides the ability to drill down into the details of the formula used to calculate the KPI or Metric, to see the building blocks of the calculation results, and to analyze the data used for the calculation. In addition, you can also view a tree of nodes that represents the display of the impact of the selected KPI, or KPI Breakdown on the relevant Objectives, Perspectives, and Scorecards. For details, see ["Explorer" on page 373](#).



# Dashboard

["First Level Navigation \(FLN\) for an Objective, a KPI, or a Metric" on page 365](#)

**Permissions.** In the Dashboard components and in their configuration dialog boxes, you can only see the Scorecards, Perspectives, Objectives, KPIs, or KPI Breakdowns for which you have permission. If you do not have permission, you do not see that element. If you do not have permission to see all the elements in a component, the error message **Data is not displayed because it does not exist or you do not have the correct viewing permissions. Contact your administrator** is displayed.

Once the Administrator has set up the relevant pages in Dashboard, you can view the information contained in the pages and analyze it using the capabilities described below.

## To access:

Click the relevant tabs in the Dashboard

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on page 356](#)

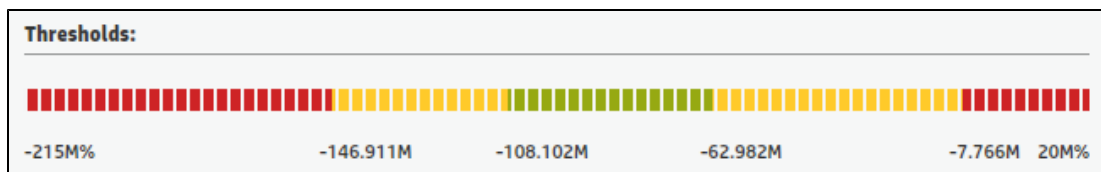
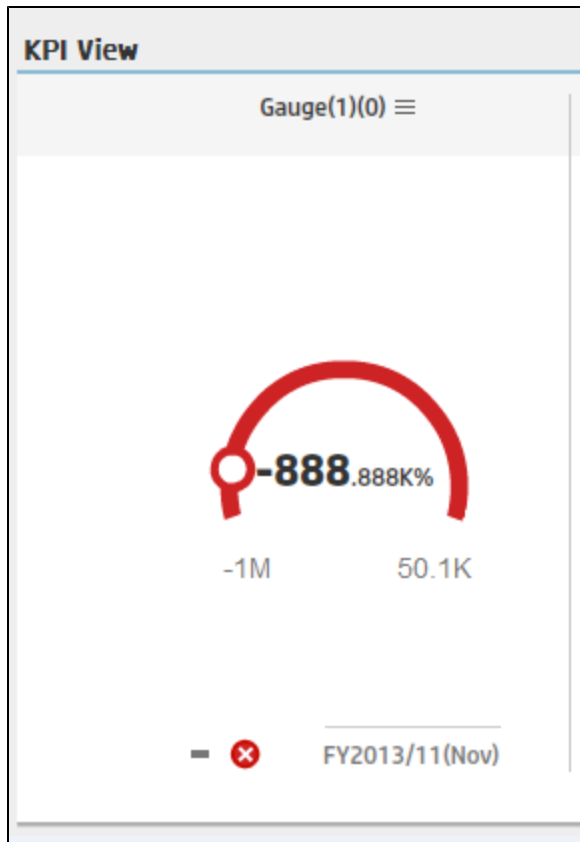
## Learn More

The out-of-the-box pages provide the tools that help the Executive plan, expand and monitor the strategies that help managing the business challenges of that Executive. For details on the business challenges for each role, see ["Executive Personas and their Business Challenges" on page 11](#).

### Decimal Precision

The decimal precision used in displays in Executive Scorecard is as follows:

- **Studio/Dashboard/Explorer Active Tree/Thresholds in Explorer.** The values of KPIs and Metrics are displayed with a maximum of 6 digits and if needed a decimal point. Digits after the decimal point are rounded to 3 digits maximum. Digits before the decimal point are rounded to 3 digits maximum and K, M, or T are used to indicate the correct value. For example: 456.7893 is rounded to 456.789, 3300122.111 is displayed as 3.300 M, or 999999 is displayed as 999.999 K



- **Thresholds in Studio.**

Because the threshold fields in the Studio are where you enter the threshold values, the thresholds display all the digits before the decimal point. Nevertheless, if you configure a KPI threshold with more than 3 digits after the decimal point, they are rounded to 3 digits. For example:



## Tasks

This section includes:

- ["View the relevant objectives in your pages" below](#)
- ["Analyze your objectives using the components on your pages" below](#)
- ["Drill down to your subordinate's Scorecards" on the next page](#)
- ["Display more information about a specific Objective or KPI" on page 358](#)
- ["Use the wiring feature to display more details about a KPI" on page 359](#)
- ["Drill down to more details about the Objectives, KPIs, or KPI Breakdowns in the Explorer tab" on page 359](#)
- ["View details about the Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs in the Explorer tab" on page 359](#)
- ["Understand the meaning of an Objective or KPI" on page 360](#)
- ["Dashboard" on page 354](#)
- ["Dashboard" on page 354](#)
- ["Add annotations to a specific Objective or KPI" on page 360](#)
- ["Print, email, or PDF the relevant annotation" on page 361](#)
- ["View a Scorecard, Objective, Perspective, KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI Details" on page 361](#)
- ["Analyze the raw data for a KPI or Metrics" on page 362](#)
- ["Dashboard" on page 354](#)

### **View the relevant objectives in your pages**

The administrator has prepared pages for your use. These pages reflect the objectives you set for yourself or your department.

In the Dashboard, click the relevant tab. It includes several components that can enable you to analyze these objectives.

### **Analyze your objectives using the components on your pages**

Depending on your permissions, the pages may include specific Scorecard components or not. Each Scorecard component represents the results of the list of selected Perspectives and their Objectives with their value, trend, and status for the measurement period. It represents strategic goals for the organization headed by the executive for whom the page was created.

For details about permissions, see [User Management](#) in the *IT Executive Scorecard Administrator Guide*.

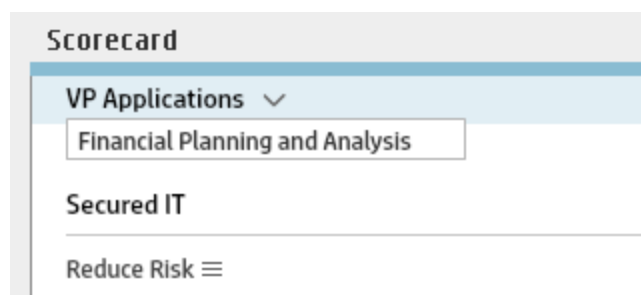
In addition, the pages may include other components that provide additional information:

- KPI List component. For details, see ["The KPI List Component" on page 247](#).
- Dimension Scoring component. For details, see [Add a Dimension Scoring Component to a Page](#).
- Historical Metric View component. For details, see ["The Historical View Component" on page 233](#).
- Historical View component. For details, see ["The Historical View Component" on page 233](#).
- KPI Rolodex component. For details, see ["The KPI Rolodex Component" on page 255](#).
- KPI View component. For details, see ["The KPI View Component" on page 263](#).
- Pie Chart View component. For details, see ["The Pie Chart Component" on page 284](#).
- Scorecard component. For details, see ["The Scorecard Component" on page 294](#).
- Web Intelligence Reports Viewer component. For details, see ["The Web Intelligence Report Viewer Component" on page 302](#).
- Web Intelligence Static Report Viewer component. For details, see ["The Web Intelligence Static Report Viewer Component" on page 307](#).
- Web Intelligence Dynamic Report Viewer component. For details, see [Add a Web Intelligence Dynamic Report Viewer Component to a Page](#)
- Xcelsius Report component. For details, see ["The SWF Report Viewer Component" on page 315](#).

## Drill down to your subordinate's Scorecards

If the administrator has prepared the relevant capability, you can drill down from your Scorecard to your subordinate Scorecard.

If the Scorecard component you are analyzing has drilldowns to subordinate (cascading) Scorecards, a small black arrow is displayed to the right of the Scorecard title.




Click the arrow to display the list of subordinate Scorecards and select the relevant one to display it.

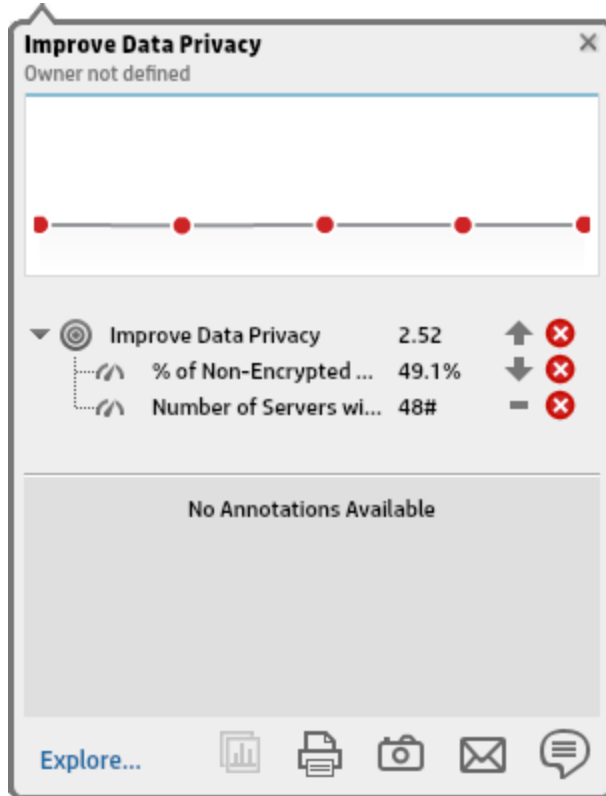
To return to the parent Scorecard, click the X to close the subordinate Scorecard display. Note that you can only access one level down (meaning that if the subordinate Scorecard has subordinates, to access their information, you must create a Scorecard component for the first level of subordinate Scorecard).


For details, see ["The Scorecard Component" on page 294](#).

## Display more information about a specific Objective or KPI

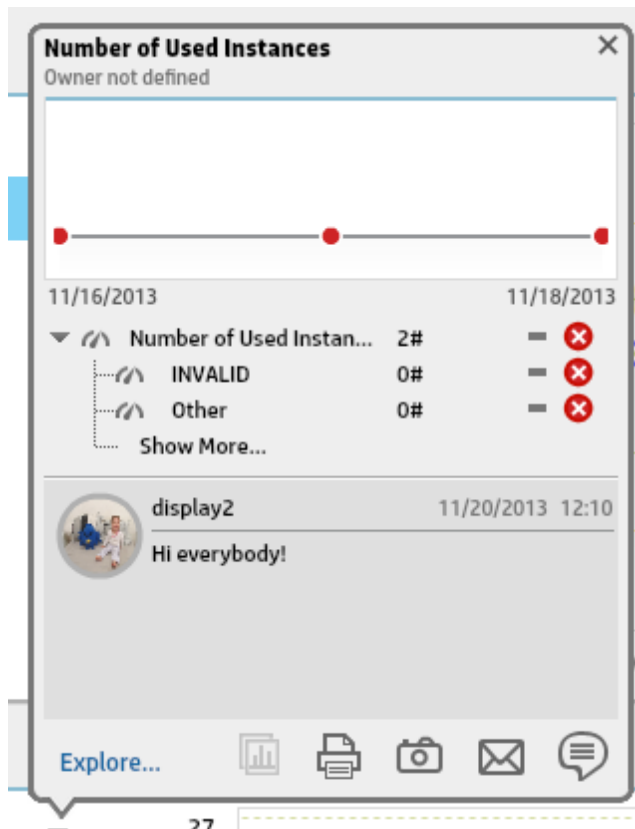
From a Scorecard component, move the cursor above the  icon at the end of the Objective's name to view over time information about the Objective, details about the Objective's KPIs and the annotations added to the Scorecard by users.

You can also add annotations, send the tooltip by email, PDF it, or print it. For details, see ["First Level Navigation \(FLN\) for an Objective, a KPI, or a Metric" on page 365](#).



From any other out-of-the-box component, moving the cursor above the  icon at the end of the KPI's name to view over time information about the KPI, its value, trend, and status, and the annotations added to the KPI by other users.

You can also add annotations, send the tooltip by email, PDF it, or print it. For details, see ["First Level Navigation \(FLN\) for an Objective, a KPI, or a Metric" on page 365](#).



### Use the wiring feature to display more details about a KPI

Component wiring defines how components on the same page interact with each other. When two components are wired, you may select one element on the first component, and immediately, the second component's display changes to view the relevant information for the selected element.

**Example** You select one KPI in the KPI View component that is wired to the Historical View and the details of the same KPI are immediately displayed in the Historical View component, on the same page, using the format of the Historical View component.

For details, see ["Wiring Between Components" on page 338](#)

### Drill down to more details about the Objectives, KPIs, or KPI Breakdowns in the Explorer tab

From an Objective or KPI tooltip, click **More Info** to open the Explorer tab filtered for the Objective, KPI, or KPI Breakdown. The Explorer tab provides over time information, details about the Objective or KPI's configuration, the complete list of annotations, the location of the Objective or KPI in the active tree, and a Goal map for the element. For details, see ["Explorer" on page 373](#).

### View details about the Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs in the Explorer tab

Depending on the selected type of entity (Scorecard, Perspective, Objective, KPI, KPI Breakdown,

Metric, Metric Breakdown, or Unassigned KPI), the Explorer tab provides over time information, configuration details, the complete list of annotations, the capability to add or edit annotations, the location of the selected item in the active tree, and a Goal map for the item. For details, see ["Explorer" on page 373](#).

## Understand the meaning of an Objective or KPI

The Objectives that are displayed in the pages and components represent the overall performance goal that you want to track. For details, see ["Objectives" on page 20](#).

The Objectives include groups of KPIs of different types that can represent different aspects of the goal. For details, see ["KPIs and Metrics" on page 21](#).

**Example** If you want to measure the IT department responsiveness, you create an Objective that measures different aspects of the IT department related to responsiveness. Each aspect is measured by a different KPI types (for example: project initiation time, PC purchase time, and more). These KPIs provide values, trends, and statuses that help you track your goals.

## Drilldown to KPI Breakdown information

A KPI represents a business context. The value of the KPI is calculated based on the entities (facts or dimensions) that provide information on the business context. A business context can include lots of facts or dimensions.

The administrator creates multiple levels of KPI Breakdowns depending on the definition of the KPI and on the KPI's business context. These definitions provide the different levels of Breakdown that enable you to obtain very detailed information about the business aspect that you are measuring.

For details, see ["KPI Breakdowns" on page 160](#).

## Access the Explorer to display detailed information about a selected KPI or Objective

You can view more detailed information for a selected KPI or Objective by moving the cursor over the relevant item in the page, component, or Scorecard component, in the Dashboard. In the tooltip that opens, click **Analyze**. The Explorer tab opens for the selected item.


You can also click the **Explorer** tab to display the Active KPIs tree, and by clicking the Objectives and KPIs in the tree, display detailed information about the selected item in the Explorer tab.


The information includes the items description, value or score, value over time, annotations sent by other users, links to relevant pages, external URLs, reports, and more.

For additional details, see ["Explorer" on page 373](#).

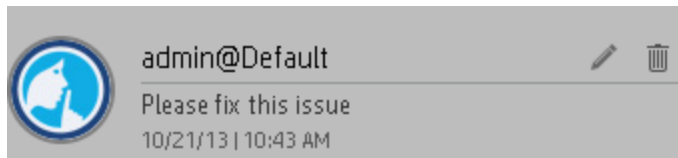
## Add annotations to a specific Objective or KPI

1. In Explorer page, click the relevant Objective or KPI in the Active KPIs tree.
2. Examine the information displayed in the Explorer Overview, Data Set, and Goal Map tabs.

3. If you have comments, click the **Show annotations**  button at the bottom of the Annotations area.
4. In the box that opens, enter your annotation, and click **Add** to add the annotation to the list of annotations in the Annotations area.



5. The annotation is added to the list.



For additional details, see ["Explorer" on page 373](#).

### **Print, email, or PDF the relevant annotation**

You can email the owner of the Objective or KPI you are analyzing.

You can also save a snapshot of the information displayed in the Overview tab (chart, annotations, and additional information for the KPI or Objective), in PDF format, or you can print that snapshot.

For additional details, see ["Explorer" on page 373](#)

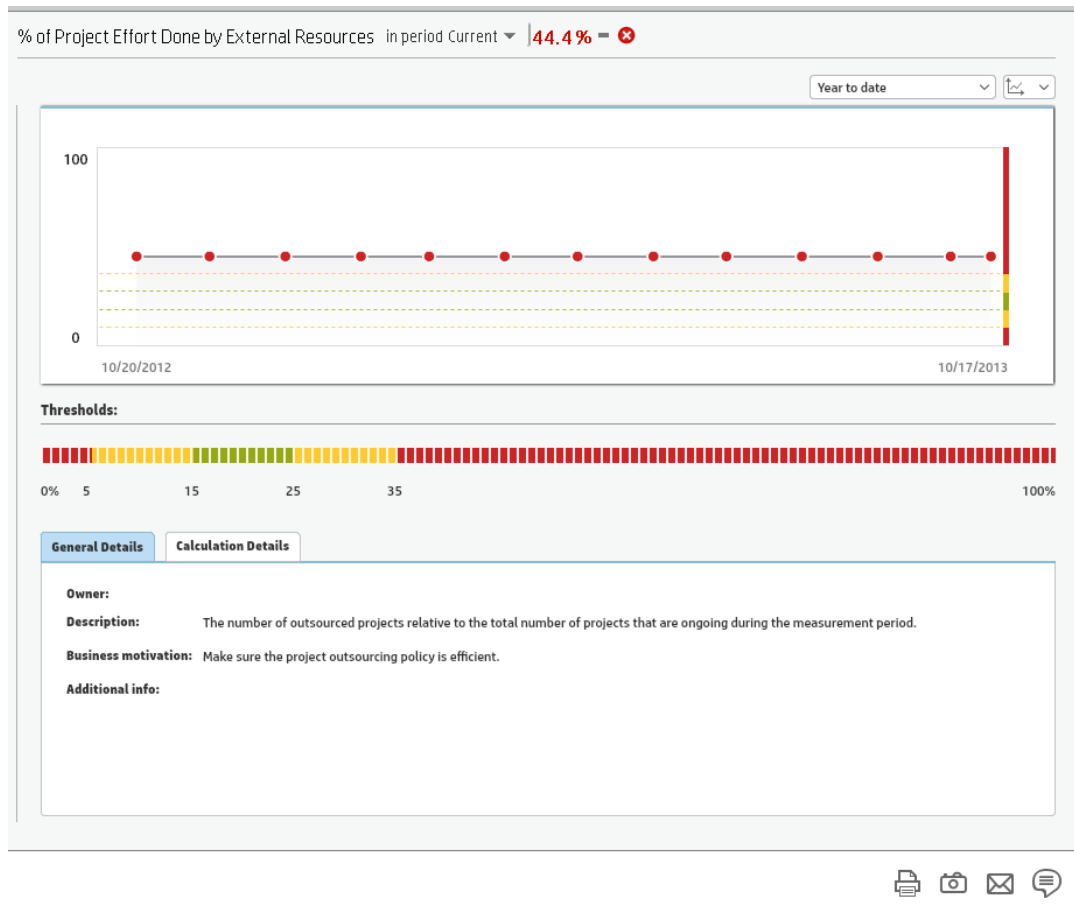
### **View a Scorecard, Objective, Perspective, KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI Details**

1. In Explorer, click the relevant Scorecard, Objective, Perspective, KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI in the Active KPIs tree.
2. Click the **Overview** button.

The Overview area in Explorer displays information about the selected Scorecard, Objective, Perspective, KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI, over time information beginning from the current period. You can also display past information by selecting a past period of time. The area displays different information depending on the type of item you selected.

For details, see ["Overview" on page 375](#).





## Analyze the raw data for a KPI or Metrics

1. In Explorer, click the relevant KPI or Metric in the Active KPIs tree.
2. Click the **Data Set** button. It provides the ability to drill down into the details of the formula used to calculate the KPI or Metric, to see the building blocks of the calculation results, and to analyze the data used for the calculation. The page provides the formula, the filter, and the display of the data. For details, see "[Data Set](#)" on page 396.

Number of Escaped Defects In period Current 29 # ↑ ⚠

COUNT (Defect, ...) Complete formula

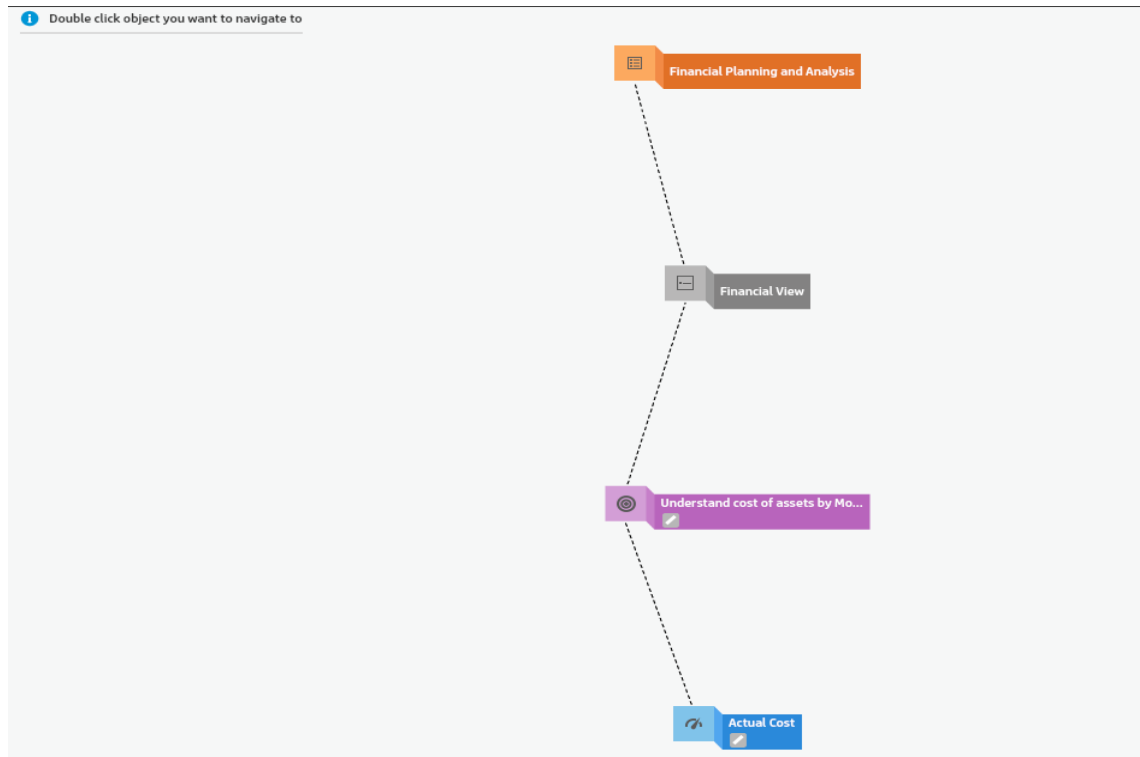
Defect 10 records out of 29 To view the full record set use Export to CSV.

DETECTED_DATE	ACTUAL_FIX_TIME	CLOSED_DATE	DEFECT_SUMMARY	ESTIMATED_FIX_TIME	FLAG_REPRODUCE
2013-11-02 00:00:00.0	38	2014-08-03 00:00:00.0		11	N
2013-11-02 00:00:00.0	3	2013-10-03 00:00:00.0		39	Y
2013-11-04 00:00:00.0	37	2014-03-05 00:00:00.0		34	N
2013-11-04 00:00:00.0	16	2013-08-05 00:00:00.0		16	Y
2013-11-05 00:00:00.0	40	2012-10-07 00:00:00.0		24	N
2013-11-05 00:00:00.0	16	2014-04-05 00:00:00.0		13	Y
2013-11-05 00:00:00.0	32	2013-04-06 00:00:00.0		16	N
2013-11-05 00:00:00.0	24	2013-06-07 00:00:00.0		43	Y
2013-11-05 00:00:00.0	4	2014-02-06 00:00:00.0		22	N
2013-11-06 00:00:00.0	18	2013-03-08 00:00:00.0		15	N



Export to CSV Print Email



## Understand the impact of one KPI on Objectives, Perspectives, and Scorecards



1. In Explorer, click the relevant KPI in the Active KPIs tree.
2. Click the **Goal Map** button. Examine the information displayed in the Goal Map tab. The Goal Map provides a tree of nodes that represents the display of the impact of the selected KPI on the relevant Objectives, Perspectives, and Scorecards, or of the selected Objective on the relevant Perspectives, and Scorecards. The Goal Map displays the impact configuration only for the current period of the selected KPI or Objective. The information displayed on the Goal Map depends on the user permission. You can double-click on a node (KPI or Objective) to select the KPI or Objective in the Active Tree and to display the Overview tab for the selected node and the current period. For details, see ["Goal Map" on page 415](#).





# First Level Navigation (FLN) for an Objective, a KPI, or a Metric

From a Scorecard component in a page, move the cursor above the  or  icon at the end of the Objective's name to view over time information about the Objective, details about the Objective's KPIs and the annotations added to the Objective by users.

From any other out-of-the-box component, moving the cursor above the  or  icon near the KPI name to view over time information about the KPI, its value, trend, status, breakdowns details and the annotations added to the KPI.

From the Pie Chart and the Historical Metric View components, moving the cursor above the  or  icon near the Metric name to view over time information about the Metric, its value, trend, breakdowns details and the annotations added to the Metric.

## To access:

Move the cursor above the  or  near a KPI or Metric in a Dashboard component to display the KPI First Level Navigation (FLN) area.

Move the cursor above the  or  near an Objective in a Scorecard component to display the Objective First Level Navigation (FLN) area.

**Section navigation:** ● ["Tasks" below](#) ● ["UI Description" on the next page](#)



## Tasks

This section includes the following tasks:

["Display more information about a specific Objective" below](#)



["Display more information about a specific KPI or Metric" below](#)



### Display more information about a specific Objective

From a Scorecard component in a page, move the cursor above the  or  icon at the end of the Objective's name to view over time information about the Objective, details about the Objective's KPIs and the annotations added to the Objective by users.

You can also add annotations, send them by email, reach Additional Info, PDF it, or print it. For details, see ["Objective First Level Navigation \(FLN\) area" on page 370](#).

### Display more information about a specific KPI or Metric

From any other out-of-the-box component, move the cursor above the  or  icon at the end of the KPI name to view over time information about the KPI, its value, trend, and status, details of KPI Breakdowns, and the annotations added to the KPI by other users.

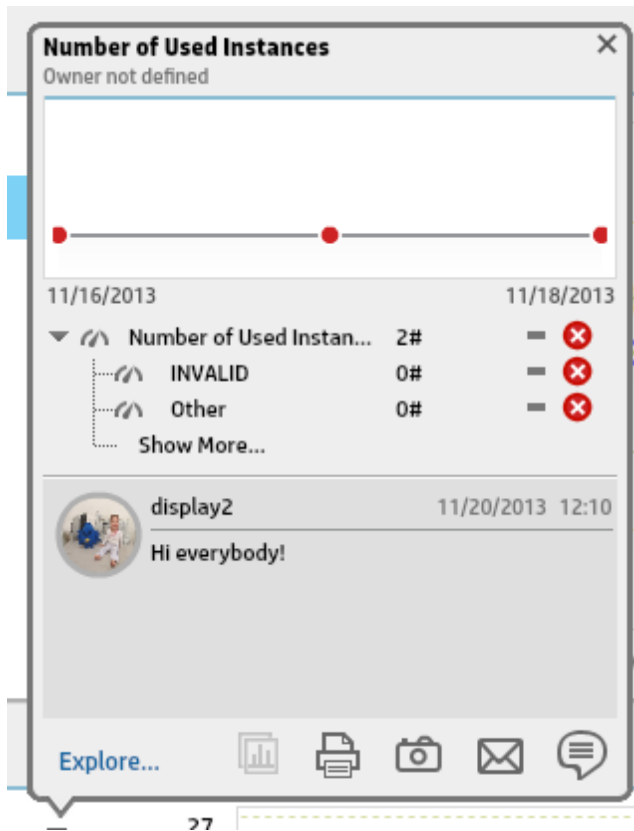
From any other out-of-the-box component, move the cursor above the  or  icon at the end of the Metric name to view its over time information, value, trend, breakdowns details and the annotations added to the Metric.

You can also add annotations, send them by email, PDF it, or print it, and if relevant view additional information for the KPI or Metric. For details, see "[First Level Navigation \(FLN\) area](#)" below.

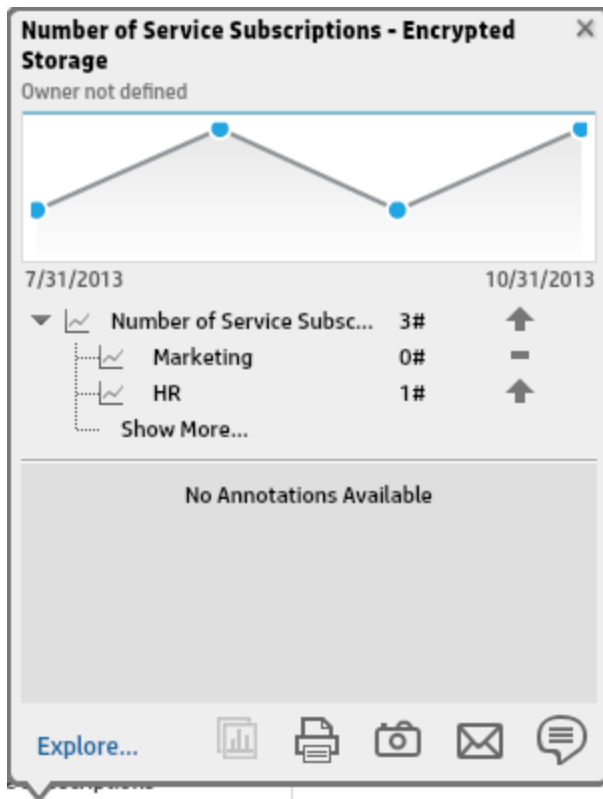
## UI Description

### First Level Navigation (FLN) area


For a KPI


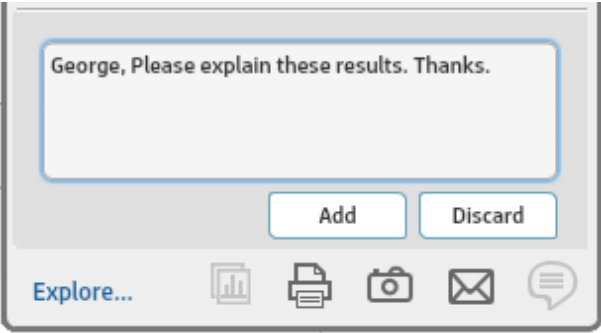



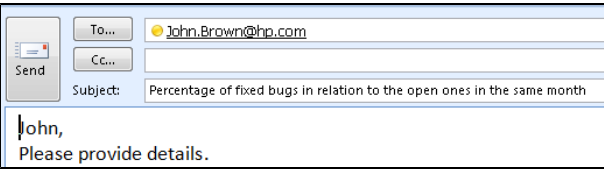



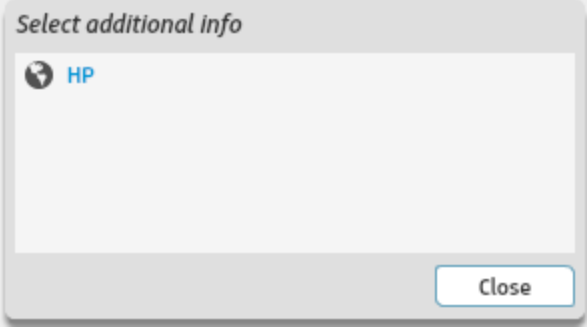
For a Metric:



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

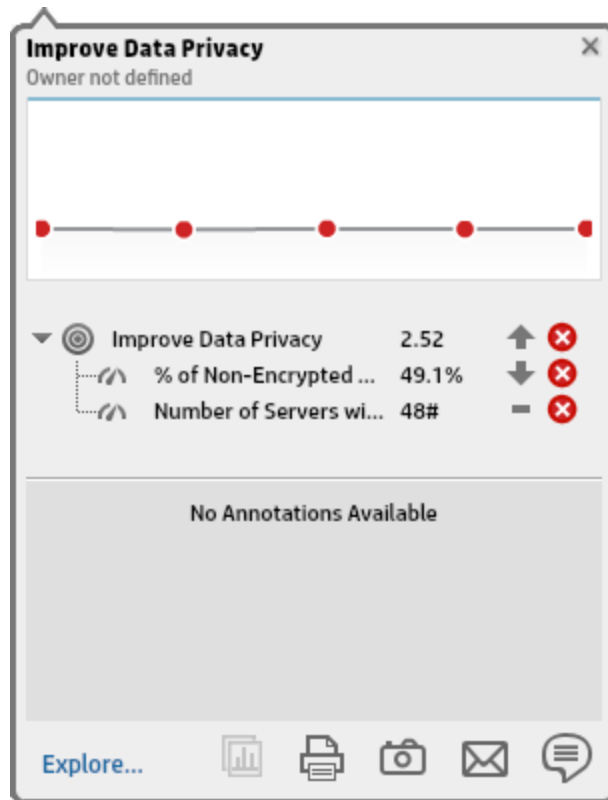
UI Element	Description
<b>Name&gt;</b>	The name of the KPI or Metric.
<b>&lt;Over Time value&gt;</b>	<p>The graph displays the over time value of the KPI or Metric for 5 periods in the past from the period configured in the Display Period for the KPI or Metric.</p> <p><b>Example</b> If the KPI or Metric Display Period is 1 month, the graph displays the value of the KPI or Metric over the past 5 months from the period configured in the Display Period.</p> <p>To add an annotation to the chart, you can click  to open an annotation box.</p>

UI Element	Description
<p><b>&lt;KPI, KPI Breakdown, Metric, or Metric Breakdown&gt;</b></p>	<p>This section displays:</p> <ul style="list-style-type: none"> <li>• The name of the KPI or Metric, its value, trend, and status (for a KPI).</li> <li>• If the KPI has more than 3 KPI Breakdowns, only the 2 Breakdowns with the lowest score are displayed in the FLN area with their name, value, trend, and status.</li> <li>• If the Metric has more than 3 Metric Breakdowns, only the 2 Breakdowns are displayed in the FLN area with their name, trend, and value.</li> <li>• If the KPI or Metric has more than 3 KPI or Metric Breakdowns, a <b>Show more</b> link appears below the list of KPI or Metric Breakdowns. Click the link to open Explorer page filtered for the selected KPI or Metric , where you can see all the KPI or Metric Breakdowns of the selected KPI or Metric.</li> <li>• When a KPI or Metric does not display data because there is no calculated data (for example, the formula is incorrect, or includes a division by zero), the KPI FLN area is available but displays <b>No data</b> and clicking the KPI or Metric in the KPI or Metric FLN area displays the Explorer tab with a short explanation of the No data problem.</li> <li>• When a KPI or Metric does not display data because the calculation period corresponds to a time when the KPI or Metric had not yet been configured in the Studio, the KPI or Metric FLN area is not available.</li> </ul>
<p><b>Annotations</b></p>	<p>Lists the last 2 annotations sent by all users (including the current user). If more than 2 annotations have been sent for the selected KPI or Metric, only 2 are displayed followed by a <b>Show more</b> link. Click the link to open Explorer filtered for the selected KPI or Metric, where you can see all the annotations of the selected KPI or Metric.</p>
<p></p>	<p><b>Add annotation.</b> Opens a box where you can add your annotation:</p>  <p>Enter the text of the annotation and click <b>Add</b> to add the annotation to the list or <b>Discard</b> to discard the annotation.</p>


UI Element	Description
	<p><b>Send mail.</b> Opens an Outlook email, with the owner of the selected Objective, KPI or Metric, or KPI or Metric Breakdown listed in the <b>To</b> box, <b>Regarding:</b> &lt;Objective_KPI/Metric_Breakdown_KPI/Metric_name&gt; in the <b>Subject</b> box, and the text of the just written annotation in the body of the email.</p> 
	<p><b>Save snapshot.</b> Opens your list of directories, where you can select the location of the PDF you are creating.</p>
	<p><b>Print.</b> Opens a dialog box where you can select and configure the printer, and send the FLN area contents to print.</p>
	<p><b>Additional info.</b> Opens a pop up that lists all the additional info configured for the KPI or Metric: reports, Dashboard pages, or external URLs. The button is enabled only when the KPI or Metric has additional information.</p> 
<p><b>Explore</b></p>	<p>Click to open Explorer filtered by the selected KPI or Metric. For details, see <a href="#">"Explorer" on page 373.</a></p>




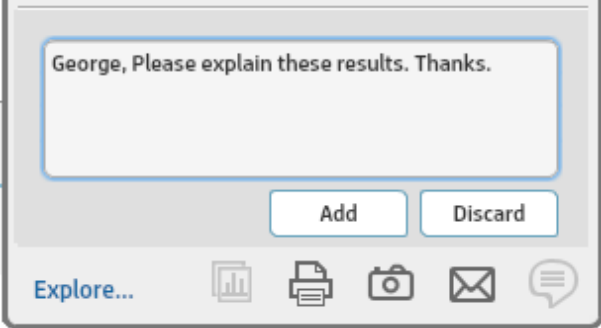

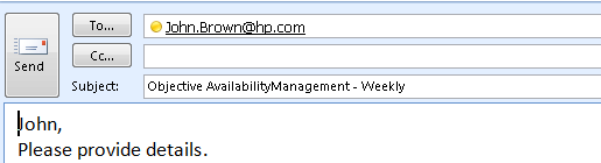



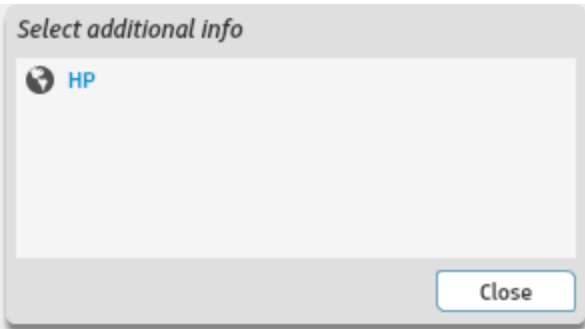
## Objective First Level Navigation (FLN) area



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

UI Element	Description
<b>Name&gt;</b>	The name of the Objective.
<b>&lt;Over Time value&gt;</b>	<p>The graph displays the over time value of the Objective for 5 periods in the past from the period that was configured for the Objective. The periods displayed are based on the period configured for the Objective.</p> <p><b>Example</b> If the Objective period is 1 month, the graph displays the value of the Objective over the past 5 months.</p> <p>To add an annotation to the chart, you can click  to open an annotation box.</p>





UI Element	Description
<Objective>	<p>This section displays:</p> <ul style="list-style-type: none"> <li>• The name of the Objective, its value, trend, and status.</li> <li>• If the Objective has 3 KPIs or less, the 3 KPIs with the lowest score are displayed in the FLN area with their name, value, trend, and status.</li> <li>• If the Objective has more than 3 KPIs, a <b>Show more</b> link appears below the list of KPIs. Click the link to open Explorer filtered for the selected Objective, where you can see all the KPIs of the selected Objective.</li> </ul> <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• When an Objective displays data but some of its KPIs do not have calculated data (for example, KPIs under the same Objective correspond to different Business Contexts and not all Business Context were calculated), the Objective FLN area is available but displays <b>Objective has been calculated with partial data</b> and clicking the Objective in the Objective FLN area displays the Explorer tab with the same message.</li> <li>• When an Objective does not display data because none of its KPIs has data, the Objective FLN area is available.</li> <li>• When an Objective does not display data because the calculation period of the Objective corresponds to a time when none of its KPIs had not yet been configured in the Studio, the Objective FLN area is not available.</li> </ul> </div>
<b>Annotations</b>	<p>Lists the last 2 annotations sent by all users (including the current user). If more than 2 annotations have been sent for the selected Objective, only 2 are displayed followed by a <b>Show more</b> link. Click the link to open Explorer filtered for the selected Objective, where you can see all the annotations of the selected Objective.</p>

UI Element	Description
	<p><b>Add annotation.</b> Opens a box where you can add your annotation:</p>  <p>Enter the text of the annotation and click <b>Add</b> to add the annotation to the list or <b>Discard</b> to discard the annotation.</p>
	<p><b>Send mail.</b> Opens an Outlook email, with the owner of the selected Objective listed in the <b>To</b> box, <b>Regarding: &lt;Objective&gt;</b> in the <b>Subject</b> box, and the text of the just written annotation in the body of the email.</p> 
	<p><b>Save snapshot.</b> Opens your list of directories, where you can select the location of the PDF you are creating.</p>
	<p><b>Print.</b> Opens a dialog box where you can select and configure the printer, and send the FLN area contents to print.</p>
	<p><b>Additional info.</b> Opens a popup that lists all the additional info configured for the Objective: reports, Dashboard pages, or external URLs. The button is enabled only when the Objective has additional information.</p> 
<p><b>Explore</b></p>	<p>Click to open Explorer filtered by the selected Objective. For details, see <a href="#">"Explorer" on the next page.</a></p>

# Explorer



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

## To access:

- Click the **Explorer** tab, click the relevant item, and click the **Overview** button to access detailed information about all the Scorecards, Objectives, Perspectives, KPIs, KPI Breakdowns, Metric, Metric Breakdown, or Unassigned KPIs that are active in Executive Studio. To obtain additional information for KPIs, KPI Breakdowns, Metric, Metric Breakdown, or Unassigned KPIs, click the **Data Set**, or **Goal Map** buttons.
  - In a Dashboard page, in any Scorecard or KPI component, you can:
    - Mouse over the  or  to display the First Level Navigation (FLN). You can then click **Explore...** in the FLN to access more information about the Scorecard Objective or KPIs in the Explorer tab.
    - Click the  or  to display more information in the Explorer tab.
- Double-click a point in the Historical View or Historical Metric View component to open the Explorer tab for the period of time corresponding to that point and to the KPI or Metric. For details, see ["The Historical View Component" on page 233](#) or ["The Historical Metric View Component" on page 221](#).

**Section navigation:** • ["Learn More" below](#) • ["Tasks" on the next page](#) • ["UI Description" on the next page](#)

## Learn More

- When you double-click a point in the KPI or Metric Overtime component or  or  in the other components, the Explorer tab displays only the details for the selected KPI or Metric for which you have the correct permissions. You are not able to display all the nodes in the Active tree.
- If you do not have permission to display the Explorer tab, then you cannot access it, even to look at the Objectives and KPIs or Metrics for which you have permission.
- Click X in the top right corner of the Explorer tab to access or return to the Dashboard.

## Tasks

### Access Explorer to display detailed information about a selected KPI, Metric, or Objective

You can view more detailed information for a selected KPI, Metric or Objective by moving the cursor over the relevant item in the KPI, Metric, or Scorecard component in the Dashboard page. In the tooltip that opens, click **Explore...** The Explorer tab opens for the selected item.

You can also click the **Explorer** tab to display the Active KPIs tree, and by clicking the Objectives and KPIs or Metrics in the tree, display detailed information about the selected item in the Explorer tab.

The information includes the items description, value or score, value over time, annotations sent by all users, links to relevant pages, external URLs, reports, and more.

The Explorer tab includes the following tabs and capabilities:

["Overview" on the next page](#)

["Data Set" on page 396](#)

["Goal Map" on page 415](#)

["Annotations" on page 426](#)

## UI Description

**Note:** When in Executive Scorecard, you navigate to another tab and then return to the Explorer tab, the details of the item that was previously in focus are displayed again. However, its properties might be refreshed.

The Explorer tab includes the following tabs and capabilities:

["Overview" on the next page](#)

["Data Set" on page 396](#)

["Goal Map" on page 415](#)

["Annotations" on page 426](#)

# Overview

The Overview area in Explorer displays information about the selected Scorecard, Objective, Perspective, KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI, over time information beginning from the current period. You can also display past information by selecting a past period of time. The area displays different information depending on the type of item you selected.

The list of Scorecards that is displayed corresponds to the Scorecards that are permitted for your user. For details about permissions, see [User Management](#) in the *IT Executive Scorecard Administrator Guide*.

## To access:

Click the **Explorer** tab to access detailed information about all the Scorecards, Objectives, Perspectives, KPIs, KPI Breakdowns, Metric, Metric Breakdown, or Unassigned KPIs that are active in Executive Studio. In the Explorer tab, click the relevant item and click the **Overview** button.

**Section navigation:** ● ["Learn More" below](#) ● ["Tasks" on the next page](#) ● ["UI Description" on page 378](#)

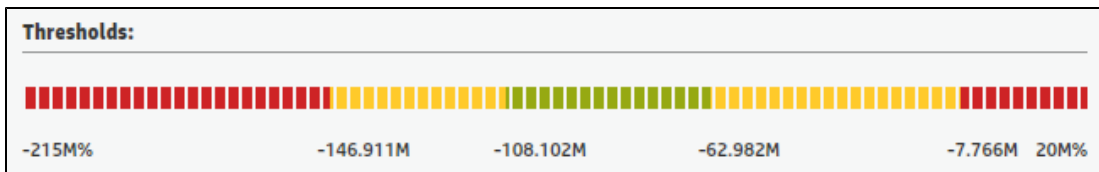
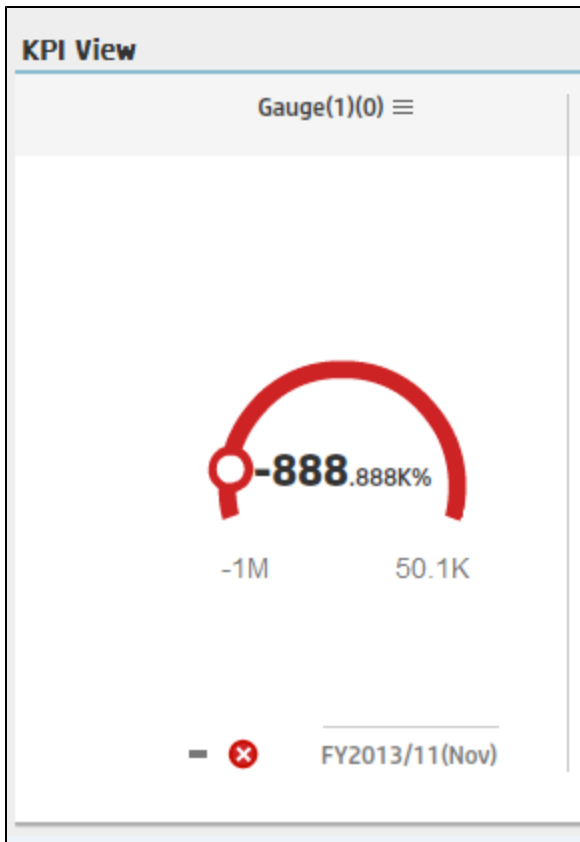
## Learn More

- When you double-click a point in the Historical View or Historical Metric View component, or ☰ or \*☰ in any component, the Explorer tab displays only the details for the selected item for which you have the correct permissions. Click the X to the right of the search box to display all the nodes in the Active tree.
- If you do not have permission to display the Explorer tab, then you cannot access it, even to look at the Objectives and KPIs for which you have permission.
- Click X in the top right corner of the Explorer tab to access or return to the Dashboard.

## Decimal Precision

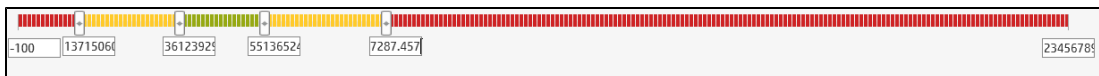
The decimal precision used in displays in Executive Scorecard is as follows:

- **Studio/Dashboard/Explorer Active Tree/Thresholds in Explorer.** The values of KPIs and Metrics are displayed with a maximum of 6 digits and if needed a decimal point. Digits after the decimal point are rounded to 3 digits maximum. Digits before the decimal point are rounded to 3 digits maximum and K, M, or T are used to indicate the correct value. For example: 456.7893 is rounded to 456.789, 3300122.111 is displayed as 3.300 M, or 999999 is displayed as 999.999 K



- **Thresholds in Studio.**

Because the threshold fields in the Studio are where you enter the threshold values, the thresholds display all the digits before the decimal point. Nevertheless, if you configure a KPI threshold with more than 3 digits after the decimal point, they are rounded to 3 digits. For example:



## Tasks

This section includes:

["Access Explorer - Overview to display detailed information about a selected KPI, Metric, or Objective" on the next page](#)

["Send the contents of the Overview page by email" on the next page](#)

["Save a snapshot of the contents of the Overview area" below](#)

["Print the contents of the Overview area" on the next page](#)

["Add an Annotation" on the next page](#)

## Access Explorer - Overview to display detailed information about a selected KPI, Metric, or Objective

To view more detailed information for a selected KPI or Objective:


1. Move the cursor over the relevant item in the KPI or Scorecard component in the Dashboard page. In the First Line Navigation (FLN) that opens, click **Explore...** The Explorer tab opens for the selected item.

Or click the **Explorer** tab to display the Active KPIs tree, and by clicking the relevant Objective, KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI in the tree, display detailed information about the selected item in the Explorer tab.

2. Click **Overview** to display the selected item over time information for the current period as defined in the item configuration. You can also display past information by selecting a past period of time.

The tab displays different information depending on the type of item you selected.

## Send the contents of the Overview page by email


1. In the Explorer tab, click the relevant item in the Active KPIs tree and click **Overview**.
2. To 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.

For additional details, see ["Explorer Tab - Overview" on the next 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 [Movies](#).

## Save a snapshot of the contents of the Overview area

1. In the Explorer tab, click the relevant item in the Active KPIs tree and click **Overview**.
2. To save a snapshot (image) of the contents of the Overview area, click the **Save snapshot**  icon.


For additional details, see ["Explorer Tab - Overview" on the next 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 [Movies](#).


## Print the contents of the Overview area

1. In the Explorer tab, click the relevant item in the Active KPIs tree and click **Overview**.
2. To print contents of the Overview area, click the **Print**  icon.

For additional details, see "[Explorer Tab - Overview](#)" below.

**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 [Movies](#).

## Add an Annotation

1. In the Explorer tab, click the relevant item in the Active KPIs tree and click **Overview**.
2. To add an annotation, click the **Show annotations**  icon. The Annotation area opens. For details, see "[Annotations](#)" on page 426.

**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 [Movies](#).

# UI Description

## Explorer Tab - Overview

**Note:** When in Executive Scorecard, you navigate to another tab and then return to the Explorer tab, the details of the item that was previously in focus are displayed again. However, its properties might be refreshed.

The Overview area displays the selected item over time information for the current period as defined in the item configuration. You can also display past information by selecting a past period of time.

The area displays different information depending on the type of item you selected.

The Overview area includes the following areas:

["Active KPIs area" on the next page](#)

["Overview area" on page 381](#)

["Toolbar" on page 394](#)

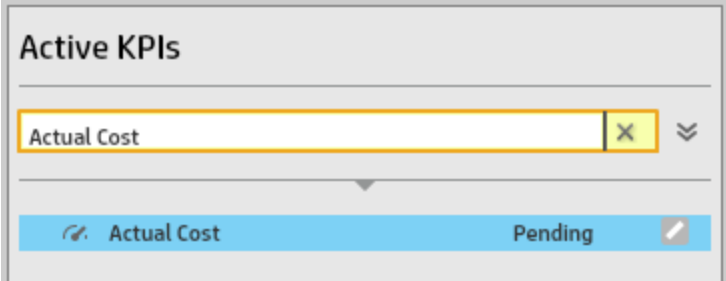
### Active KPIs area






**Active KPIs**

Search: [ ]

- Financial Planning and Analysis
  - VP Applications
    - Customer
      - Improve Customer Satisfaction 5 [ - ] [ ! ]
        - % of Affected End Users by ... No Data [ / ]
        - % of Applications Availability No Data [ / ]
        - % of Approved Project Scop... 100% [ - ] [ ✓ ]
        - % of Met SLAs 100% [ - ] [ ✓ ]
        - % of Met Service Performance No Data [ / ]
        - % of Satisfied Customers 100% [ - ] [ ✓ ]
        - Demands Backlog 293# [ - ] [ ✗ ]
        - Downtime % Based on SLAs No Data [ / ]
        - Project Scope Changes Back... 210# [ - ] [ ✗ ]
        - Proposals Backlog 178# [ - ] [ ✗ ]
      - Improve Quality of Delivery No Data [ / ]
    - Future Orientation
    - IT Value
    - Operational Excellence
    - Secured IT
  - Public Metrics and KPIs

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

UI Element	Description
<p>🔍 &lt;Search&gt;</p>	<p>Enter the relevant string to display, in the tree, the nodes whose name includes the string.</p> <p>In addition, the child nodes of the filtered nodes are also listed even when the child node names do not include the string.</p> <p>If the display is filtered (in case you accessed the Explorer from one of the components in the Dashboard), the &lt;Search&gt; box displays information about the filter. For example:</p> 
<p>⌵</p>	<p><b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:</p> <ul style="list-style-type: none"> <li>• <b>Status:</b> Select one of the <b>All</b>, <b>Good</b>, <b>Warning</b>, <b>Critical</b>, or <b>No Data</b> values to display only the elements with the selected status, in the Active KPIs area. When you select <b>No Data</b>, the search returns only the elements with no data.</li> <li>• <b>Type:</b> Select: <ul style="list-style-type: none"> <li>▪ <b>All.</b> To display all the elements in the tree with the selected status.</li> <li>▪ <b>KPI.</b> To display only the KPIs with the selected status.</li> <li>▪ <b>Metric.</b> To display a list of all the Metrics (the Status is changed to <b>All</b>). If you had selected a value in Status, and then you select <b>Metric</b>, then the Status field displays <b>All</b>, and becomes inaccessible.</li> <li>▪ <b>Objective.</b> To display only the Objectives with the selected status, and their KPIs.</li> </ul> </li> </ul>

UI Element	Description
<p><b>Active KPIs</b></p>	<p>Depending on how you accessed the Explorer tab, the pane lists all the Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, and Unassigned KPIs, active in the HP IT Executive Scorecard or a subset of these items.</p> <p>The list of Scorecards that is displayed corresponds to the Scorecards that are permitted for your user. For details about permissions, see <a href="#">User Management</a> in the <i>IT Executive Scorecard Administrator Guide</i>.</p> <div style="background-color: #f0f0f0; padding: 10px; margin: 10px 0;"> <p><b>Note:</b> A Scorecard Administrator who wants to see a newly created Scorecard in Explorer (and who has the correct permissions to see the Scorecard), needs to refresh the Explorer using the <b>Refresh</b> button to display the Scorecard.</p> </div> <p>Click one of the Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs to display their detailed information in the other pane.</p> <p>The area also displays on the right side of the Active KPIs pane, a subset of the following items depending on the type of item you selected:</p> <ul style="list-style-type: none"> <li>• The name of the item.</li> <li>• The value of the item.</li> <li>•  The trend icon indicates the trend of the value calculated over the current period.</li> <li>• The status of the item, during the current period. It can be:             <ul style="list-style-type: none"> <li>▪  indicates that the status is <b>Good</b>.</li> <li>▪  indicates that the status is <b>Warning</b>.</li> <li>▪  indicates that the status is <b>Critical</b>.</li> <li>▪  indicates that the status is <b>Pending</b> and that the calculations have not yet been performed or completed.</li> </ul> </li> </ul>

**Overview area**

- <Graph or table area>

■ **For a Scorecard:**

Financial Planning and Analysis

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**Name**  
Financial Planning and Analysis

**Description**  
Financial Planning and Analysis

**Cascading Scorecards:**  
New Scorecard

UI Element	Description
<Name>	The name of the Scorecard you selected in the Active KPIs pane.
<b>Name</b>	The name of the Scorecard you selected in the Active KPIs pane.
<b>Description</b>	The description of the Scorecard as it appears in the Scorecard Configuration Details pane.
<b>Cascading Scorecards</b>	<p>The list of Cascading Scorecards assigned to the Scorecard.</p> <p><b>Note:</b> This field appears only for Scorecards and when the Scorecard has been assigned Cascading Scorecards.</p>

■ **For a Perspective:**

Financial View

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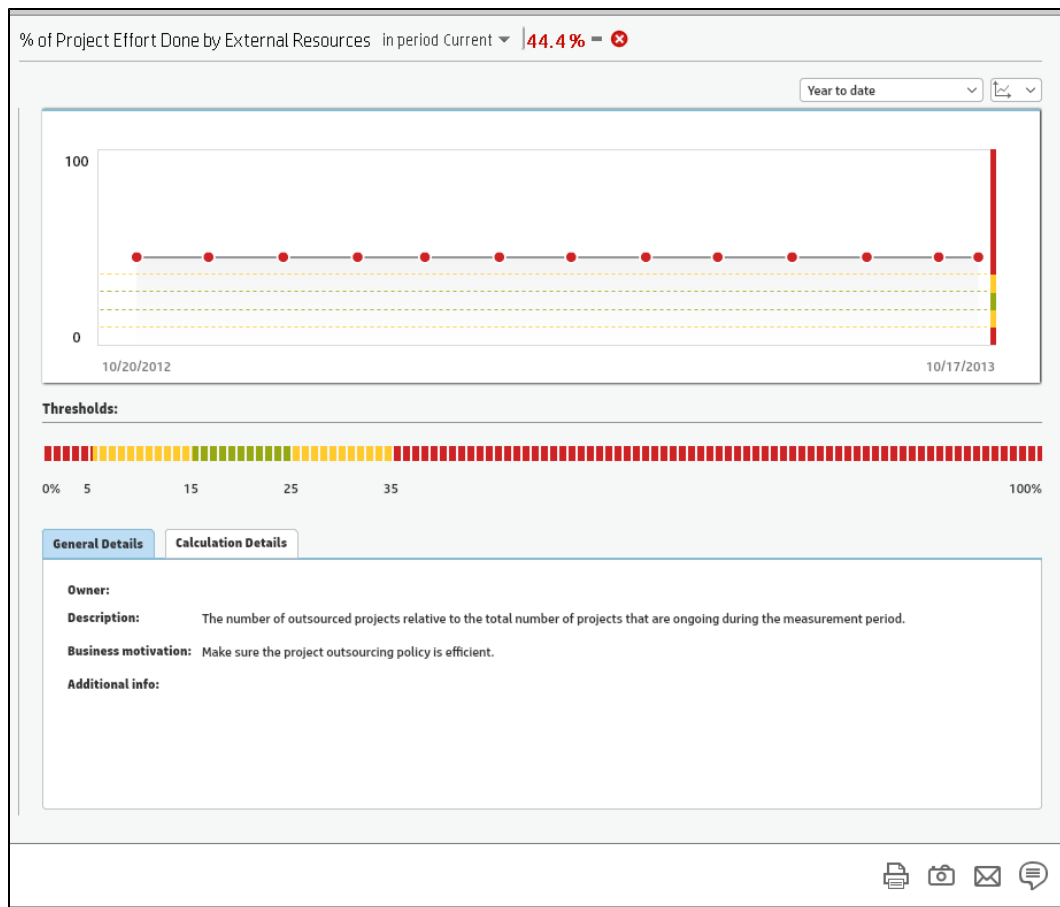
**Name**  
Financial View

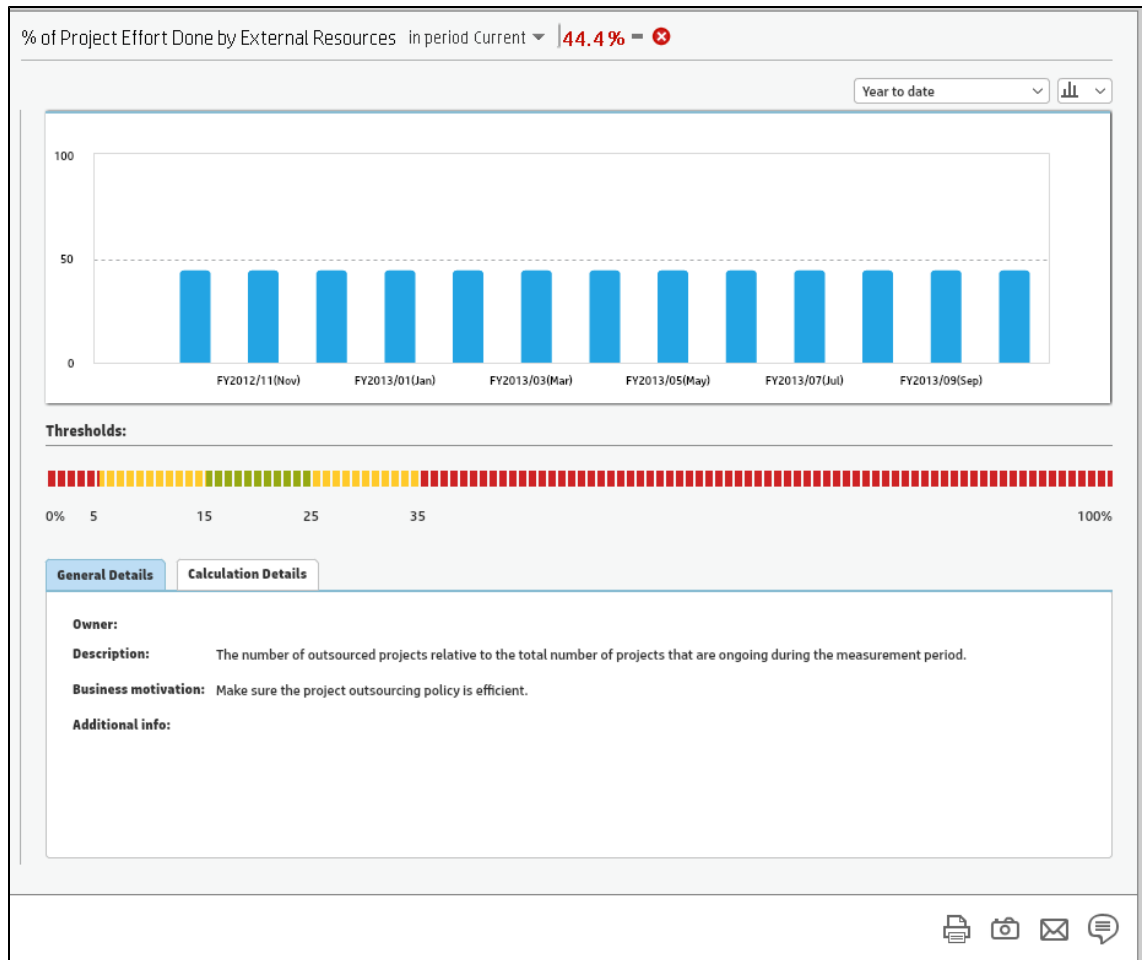
**Description**  
This provides the financial view of your enterprise.

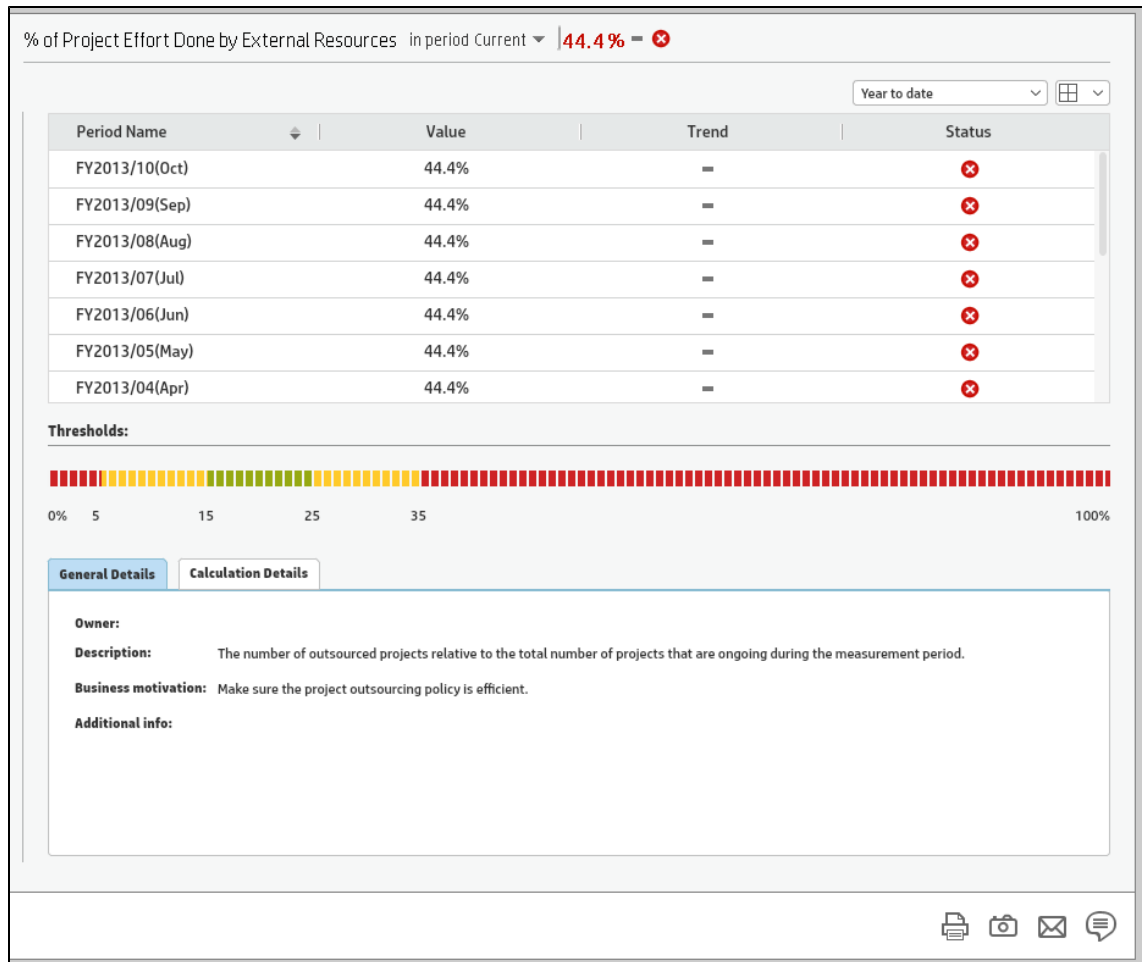
UI Element	Description
<Name>	The name of the Perspective you selected in the Active KPIs pane.
Name	The name of the Perspective you selected in the Active KPIs pane.
Description	The description of the Perspective as it appears in the Perspective Configuration Details pane.

■ **For an Objective, KPI, Metric, or Unassigned KPI:**

The area displays the selected item over time information spanning a time period up to the current time period for the selected Objective, KPI, Metric or Unassigned KPI or for the period you selected in the Overview tab. You can select graph, bars, or table format to display the data.

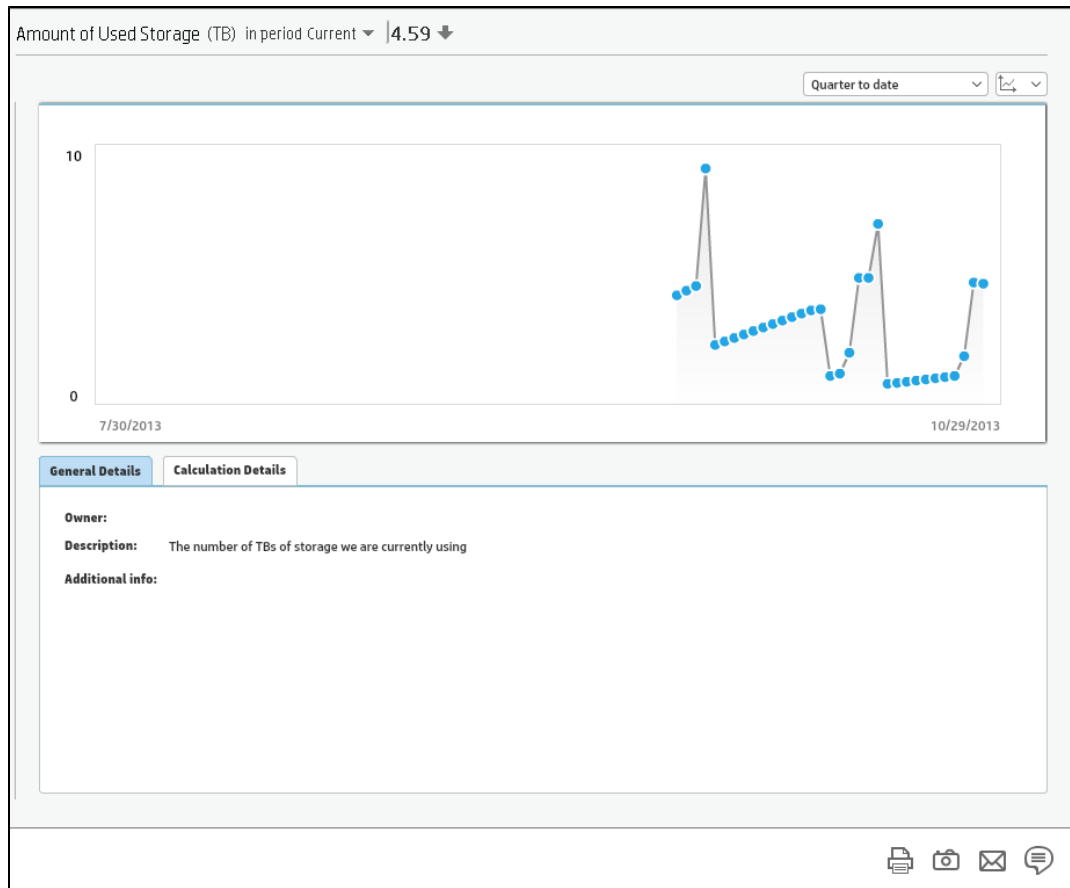











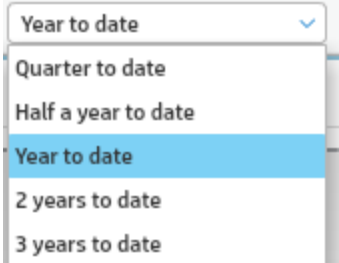
The area displays the selected item over time information spanning a time period up to the current time period for the selected Metric or for the period you selected in the Overview tab.

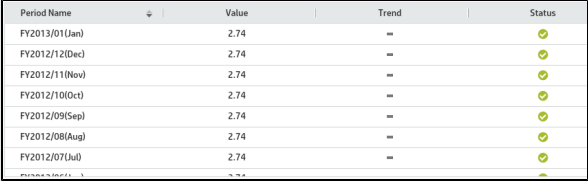







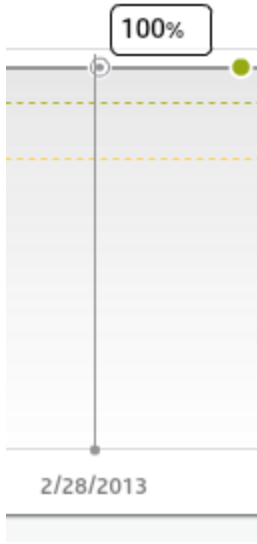







User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets>):

UI Element	Description
<p><b>&lt;Name&gt; in period</b>  <b>&lt;Selection&gt;</b>  <b>&lt;Value&gt; &lt;Trend&gt; &lt;Status&gt;</b></p>	<div data-bbox="711 323 1383 403" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">                     Number of Escaped Defects in period Current ▾   29 # ↑ ⚠                 </div> <p>The title lists:</p> <ul style="list-style-type: none"> <li>○ The name of the selected item (KPI, KPI Breakdown, Unassigned KPI, or, Metric, or Metric Breakdown).</li> <li>○ <b>&lt;Name&gt;</b>. The name of the selected item (KPI, KPI Breakdown, Unassigned KPI, or, Metric, or Metric Breakdown).</li> <li>○ <b>in period &lt;Selection&gt;</b>. Select the period you want to display. You can select:                         <ul style="list-style-type: none"> <li>○ <b>Current</b>. The title of the page displays the current value, trend, and status of the selected item.</li> <li>○ <b>Last Closed</b>. The title of the page displays the value, trend, and status of the selected item for the last completed calculation period.</li> <li>○ A list of periods when the value of the selected item was calculated.</li> </ul> </li> <li>○ <b>Value</b>. The value of the selected item.</li> <li>○ <b>Trend</b>.  The trend icon indicates the trend of the value of the selected item in the selected period compared to its value in the previous period.</li> <li>○ <b>Status</b>. The status of the KPI, KPI Breakdown (Metrics, and Metric Breakdowns do not have a status), during the current period. It can be:                         <ul style="list-style-type: none"> <li>○  indicates that the status is <b>Good</b>.</li> <li>○  indicates that the status is <b>Warning</b>.</li> <li>○  indicates that the status is <b>Critical</b>.</li> <li>○  indicates that the status is <b>Pending or No data</b>, meaning that the calculation of the status was not yet completed or the status was not calculated or that there was an error in the calculation.</li> </ul> </li> </ul>

UI Element	Description																																																																
	<p data-bbox="708 323 1354 386">To display historical information, select the relevant past periods of time.</p> <p data-bbox="708 422 1321 485">The displayed periods corresponding to the period you selected in the <b>in period</b> list in the title of the page.</p> <p data-bbox="727 541 841 573"><b>Example</b></p> <ul data-bbox="732 604 1344 737" style="list-style-type: none"> <li>○ If you select <b>in period=Current</b> and <b>Year to date</b>, the graph, bars, or table display information that starts a year ago from the current date and ends at the current date.</li> </ul> <table border="1" data-bbox="768 768 1349 957"> <thead> <tr> <th>Period Name</th> <th>Value</th> <th>Trend</th> <th>Status</th> </tr> </thead> <tbody> <tr><td>FY2013/10(Oct)</td><td>2.74</td><td>=</td><td>⊕</td></tr> <tr><td>FY2013/09(Sep)</td><td>2.74</td><td>=</td><td>⊕</td></tr> <tr><td>FY2013/08(Aug)</td><td>2.74</td><td>=</td><td>⊕</td></tr> <tr><td>FY2013/07(Jul)</td><td>2.74</td><td>=</td><td>⊕</td></tr> <tr><td>FY2013/06(Jun)</td><td>2.74</td><td>=</td><td>⊕</td></tr> <tr><td>FY2013/05(May)</td><td>2.74</td><td>=</td><td>⊕</td></tr> <tr><td>FY2013/04(Apr)</td><td>2.74</td><td>=</td><td>⊕</td></tr> </tbody> </table> <ul data-bbox="732 995 1349 1262" style="list-style-type: none"> <li>○ If you select <b>in period=Last Closed</b> and <b>Year to date</b>, the graph, bars, or table displays the information for the periods that are closed starting a year ago from the last closed period and ending at the Last Closed date. The current month, for example, October 2013 is not included because it is not completed at the time when the picture was created.</li> </ul> <table border="1" data-bbox="768 1293 1349 1482"> <thead> <tr> <th>Period Name</th> <th>Value</th> <th>Trend</th> <th>Status</th> </tr> </thead> <tbody> <tr><td>FY2013/09(Sep)</td><td>2.74</td><td>=</td><td>⊕</td></tr> <tr><td>FY2013/08(Aug)</td><td>2.74</td><td>=</td><td>⊕</td></tr> <tr><td>FY2013/07(Jul)</td><td>2.74</td><td>=</td><td>⊕</td></tr> <tr><td>FY2013/06(Jun)</td><td>2.74</td><td>=</td><td>⊕</td></tr> <tr><td>FY2013/05(May)</td><td>2.74</td><td>=</td><td>⊕</td></tr> <tr><td>FY2013/04(Apr)</td><td>2.74</td><td>=</td><td>⊕</td></tr> <tr><td>FY2013/03(Mar)</td><td>2.74</td><td>=</td><td>⊕</td></tr> </tbody> </table> <ul data-bbox="732 1514 1349 1713" style="list-style-type: none"> <li>○ If you select <b>in period=FY2012/12(Dec) (12/1/12 - 12/31/12)</b> and <b>Year to date</b>, the graph, bars, or table displays the information for the periods when the value of the item was calculated. The period displayed starts a year ago from the selected time period and ends at the selected time period.</li> </ul>	Period Name	Value	Trend	Status	FY2013/10(Oct)	2.74	=	⊕	FY2013/09(Sep)	2.74	=	⊕	FY2013/08(Aug)	2.74	=	⊕	FY2013/07(Jul)	2.74	=	⊕	FY2013/06(Jun)	2.74	=	⊕	FY2013/05(May)	2.74	=	⊕	FY2013/04(Apr)	2.74	=	⊕	Period Name	Value	Trend	Status	FY2013/09(Sep)	2.74	=	⊕	FY2013/08(Aug)	2.74	=	⊕	FY2013/07(Jul)	2.74	=	⊕	FY2013/06(Jun)	2.74	=	⊕	FY2013/05(May)	2.74	=	⊕	FY2013/04(Apr)	2.74	=	⊕	FY2013/03(Mar)	2.74	=	⊕
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	<p>Select one of the following chart types:</p> <ul style="list-style-type: none"> <li> to display the information in line chart format.</li> <li> to display the information in bar chart format.</li> <li> to display the information in table format.</li> </ul>																																
<p><b>&lt;Line chart format&gt;</b></p>	<ul style="list-style-type: none"> <li>○ <b>&lt;X-axis&gt;</b>. The X-axis displays the time frame you selected, split into equal segments corresponding to the configured period of the item.</li> <li>○ <b>&lt;Y-axis&gt;</b>. The Y-axis displays the values of the selected item in the relevant unit.</li> </ul> <p><b>&lt;Tooltip&gt;</b>. Displays the value of the item for the relevant time frame.</p>																																

UI Element	Description
<p>&lt;Graph format&gt;</p>	<ul style="list-style-type: none"> <li>○  Indicates a regular "point" corresponding to a division of the time period.</li> </ul> <p>You can move the cursor above the graph to display a line that shows the exact date of a specific point.</p>  <ul style="list-style-type: none"> <li>○  <b>No valid data available</b> is shown at the top of the display when there is no calculated data for the selected item for the selected period. This can be due to an incorrect formula (for example: division by zero), an arithmetic error due to missing data, or other reasons.</li> <li>○ <b>&lt;Threshold&gt;</b>. The chart automatically displays the thresholds if you have selected an Objective or KPI.</li> <li>○ <b>&lt;X-axis&gt;</b>. The X-axis displays the time frame of the selected item, split into equal segments.</li> <li>○ <b>&lt;Y-axis&gt;</b>. The Y-axis displays the values of the selected item in the relevant unit.</li> </ul>

UI Element	Description
<Table format>	<ul style="list-style-type: none"> <li>○ <b>Period Name.</b> The list of relevant periods. For details see the explanation for Year to date and other historical periods higher in the table.</li> <li>○ <b>Value.</b> The value of the selected item for that period.</li> <li>○ <b>Trend.</b>  The trend icon indicates the trend of the value calculated over the period configured for the item.</li> <li>○ <b>Status.</b> The status of the item during the period. It can be: <ul style="list-style-type: none"> <li>○  indicates that the status is <b>Good</b>.</li> <li>○  indicates that the status is <b>Warning</b>.</li> <li>○  indicates that the status is <b>Critical</b>.</li> </ul> </li> </ul>
<b>Thresholds</b>	<p>The threshold definition of the Objective, KPI or KPI Breakdown.</p> <p>Thresholds are not relevant for a Metric or Metric Breakdown.</p>
<b>General Details tab</b>	<p><b>Owner.</b> The owner of the item (Objective, KPI, KPI Breakdown, Metric, Metric Breakdowns or Unassigned KPI) selected in the Active KPIs pane.</p> <p><b>Description.</b> The description of the item selected in the Active KPIs pane.</p> <p><b>Business Motivation.</b> The business motivation of the KPI or KPI Breakdown selected in the Active KPIs pane.</p> <p><b>Additional Info.</b> Links to external pages, Dashboard pages that were configured in the Studio for the Objective, KPI, or Metric, BO, or Xcelsius reports as configured in the item configuration.</p> <p><b>Note for the System Administrator:</b> Xcelsius and BO Reports can be added as Additional Info in the Objective, KPI, KPI Breakdown, Metric, Metric Breakdowns or Unassigned KPI configuration when the <b>parameter bo.in.use</b> is configured as <b>true</b> in the SETTINGS_MANAGEMENT table in the Management database.</p>

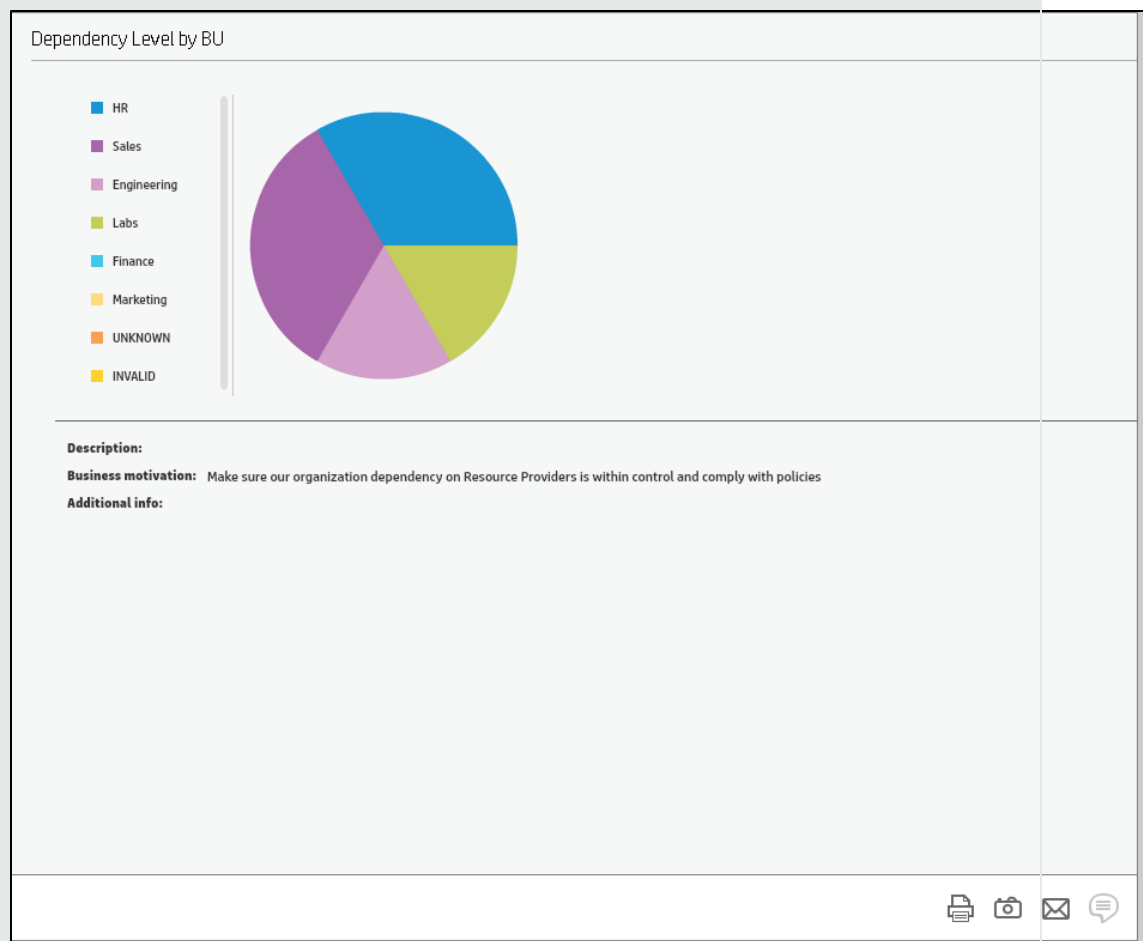
UI Element	Description
<p><b>Calculation Details tab</b></p>	<p>The tab displays the configuration of the Objective, KPI, or Metric as it appears in the Studio.</p> <div data-bbox="711 417 1313 590" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>General Details   <b>Calculation Details</b></p> <p>Unit: %</p> <p>Calculation period: Monthly</p> <p>Business Context: ServiceDeskDemo</p> <p>KPI Formula: PERCENTAGE(SurveyResult.SurveyResult.Score=5 And SurveyResult.Type='Service Desk Satisfaction' And PERIOD_ENTITY =SurveyResult.Period, SurveyResult.Type='Service Desk Satisfaction' And PERIOD_ENTITY=SurveyResult.Period,100)</p> <p>Filter:</p> <p>Comments:</p> </div> <p><b>Unit.</b> The unit of the Metric, KPI, or KPI Breakdown or Metric Breakdown.</p> <p><b>Calculation Period.</b> The period of the Objective, Metric, KPI, or KPI Breakdown.</p> <p><b>Business Context.</b> The context assigned to the Metric, KPI, or KPI Breakdown or Metric Breakdown.</p> <p><b>KPI/Metric Formula.</b> The formula used to calculate the KPI/Metric value.</p> <p><b>Filter.</b> The filter assigned to the KPI/Metric.</p> <p><b>Comments.</b> The comments added to the KPI/Metric definition.</p> <p><b>Calculated Using.</b> The type of rule used to calculate the Objective's score according to the score of its children. It can be:</p> <ul style="list-style-type: none"> <li>◦ <b>Worst child.</b> The Objective score is the worst score of all the KPIs assigned to the parent Objective (when the Objective has child KPIs) or of the Objectives assigned to the parent Objective.</li> <li>◦ <b>Best child.</b> The Objective score is the best score of all the KPIs assigned to the parent Objective (when the Objective has child KPIs) or of the Objectives assigned to the parent Objective.</li> <li>◦ <b>Weighted average.</b> The Objective score is the average of the scores of the KPIs assigned to the parent Objective multiplied by the relevant weights, or if the Objective has child Objectives, the average of the scores of the child Objectives</li> </ul>

UI Element	Description
	<p>multiplied by the relevant weights. When you select this rule in the Studio, an additional column (Weight) where the user can configure the weight of each child (Objective or KPI) for the weighted average calculation. When you select this value a note is displayed explaining what is weighted average.</p>

■ **For a KPI Breakdown or a Metric Breakdown:**

If you click the KPI Breakdown or Metric Breakdown in the Active KPIs area of the Explorer page, the pie chart below is displayed.

The figure below shows the Overview for a KPI Breakdown.




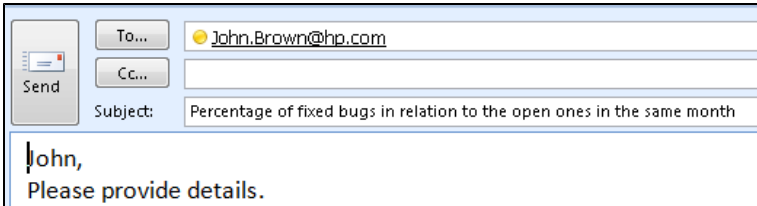






User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets):

UI Element	Description
<Name>	<ul style="list-style-type: none"> <li>&lt;Name&gt;. The name of the selected item (KPI, KPI Breakdown, Unassigned KPI, or, Metric, or Metric Breakdown).</li> </ul>
<Legend>	The legend displays the representative color and the value of the KPI Breakdown or Metric dimension.
<Pie>	<p>The pie includes up to 10 slices.</p> <p>If the KPI Breakdown or Metric dimension has more than 10 values, 9 slices of the pie represent the highest values of the dimension. The 10th slice represents all the other values. A tooltip displays details about each slice: the name of the KPI or Metric, the value of the dimension. The tooltip of the 10th slice shows the list of the 3 other highest values.</p>
Description	The description of the KPI Breakdown or Metric Breakdowns selected in the Active KPIs pane.
Business Motivation	The business motivation of the KPI Breakdown or Metric Breakdowns selected in the Active KPIs pane.
Additional Info	Links to external pages, Dashboard pages that were configured in the Studio for the KPI Breakdown or Metric Breakdown, BO, or Xcelsius reports as configured in the KPI Breakdown or Metric Breakdown configuration.

## Toolbar

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

UI Element	Description
	<p><b>Send mail.</b> Opens an Outlook email, with the owner of the selected Objective, KPI, Metric listed in the <b>To</b> box, <b>Regarding:</b> &lt;Item_name&gt; in the <b>Subject</b> box, and enter the text you want in the body of the email.</p> 
	<p><b>Save snapshot.</b> Captures the current view in Explorer (all of it) in a new window. A dialog box opens to ask you where you want to save the image.</p>

UI Element	Description
	<p><b>Print.</b> Displays the Print dialog box where you can select the printer and how to print the content of the corresponding Explorer tab.</p> <p>The printout includes:</p> <ul style="list-style-type: none"><li>• The contents of the area that was selected while you clicked the button.</li><li>• The Annotations Area.</li></ul>
	<p><b>Show/Hide Annotations.</b> The button is enabled only for Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPI. It opens a box where you can add your annotation or hide them after viewing. For details, see <a href="#">"Annotations" on page 428</a>.</p> <p>Click the button again to close the Annotation area.</p> <div data-bbox="412 821 1370 1192" style="background-color: #f0f0f0; padding: 10px;"><p><b>Note:</b> The <b>Show/Hide Annotations</b> icon with a little + sign  in the bottom toolbar indicates that a new annotation was added to the selected item during the past week.</p><p>The number of days during which the annotations are considered to be new is a setting that is configurable by your administrator in <b>Admin &gt; Scorecard &gt; Dashboard Settings &gt; Number of days annotations are considered new</b>. For example, if the administrator gives the setting the value <b>14</b>, then the + sign will indicate that the annotation was added in the last 2 weeks. The default is a week.</p></div>

# Data Set

The Data Set area in the Explorer tab is available only for KPIs, Metrics, KPI Breakdowns, and Metric Breakdowns. It provides the ability to drill down into the details of the formula used to calculate the KPI or Metric, to see the building blocks of the calculation results, and to analyze the data used for the calculation. The page provides the formula, the filter, and the display of the data.

## To access:

Click the **Explorer** tab to access detailed information about all the Scorecards, Objectives, Perspectives, KPIs, KPI Breakdowns, Metric, Metric Breakdown, or Unassigned KPIs that are active in Executive Studio. In the Explorer tab, click the relevant item and click the **Data Set** button.

**Section navigation:** ● ["Data Set" above](#) ● ["Tasks" below](#) ● ["UI Description" on page 401](#)

## Tasks

This section includes:

- ["Access Explorer to display detailed information about a selected KPI or Objective" below](#)
- ["View the numeric result of each aggregation function used in the formula" on the next page](#)
- ["View the table of raw data used for each aggregation function used in the formula" on the next page](#)
- ["View the SQL query details" on page 398](#)
- ["Export raw data to a .csv file" on page 399](#)
- ["View the key elements of the percentage formula" on page 400](#)
- ["Send the contents of the Data Set page by Email" on page 400](#)
- ["Export the contents of the Data Set page to a PDF file" on page 401](#)
- ["Print the contents of the Data Set page " on page 401](#)

### **Access Explorer to display detailed information about a selected KPI or Objective**

To view more detailed information for a selected KPI or Objective:

1. Move the cursor over the relevant item in the KPI or Scorecard component in the Dashboard page. In the tooltip that opens, click **Explore....** The Explorer tab opens for the selected item.

Or click the **Explorer** tab to display the Active KPIs tree, and by clicking the relevant KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI in the tree, display detailed information about the selected item in the Explorer tab.

2. Click the **Data Set** button to display the details of the formula used to calculate the KPI or Metric, to see the building blocks of the calculation results, and to analyze the data used for the calculation. The page provides the formula, the filter, and the display of the data..

## View the numeric result of each aggregation function used in the formula

To view numeric result of each aggregation function used in the formula of a selected KPI or Metric:

1. Click the **Explorer** tab to display the Active KPIs tree, and by clicking the relevant KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI in the tree, display detailed information about the selected item in the Explorer tab.
2. Click the **Data Set** button.

The formula used to calculate the KPI or Metric is displayed at the top of the page. You can click each aggregation part of the formula to activate it. It then has a blue background.

```
PERCENTAGE_MATH ( SUM (Cost.Amount, ...), SUM (Cost.Amount, ...), 100) - 100 Complete formula
```

Move the cursor above that area to display the value of that function.

```
PERCENTAGE_MATH ( 4,174,502 (Cost.Amount, ...), SUM (Cost.Amount, ...), 100) - 100 Complete formula
```

## View the table of raw data used for each aggregation function used in the formula

To view table of raw data used for each aggregation function used in the formula of a selected KPI or Metric:

1. Click the **Explorer** tab to display the Active KPIs tree, and by clicking the relevant KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI in the tree, display detailed information about the selected item in the Explorer tab.
2. Click the **Data Set** button.

The formula used to calculate the KPI or Metric is displayed at the top of the page. The activated aggregation function has a blue background.

```
PERCENTAGE_MATH ( SUM (Cost.Amount, ...), SUM (Cost.Amount, ...), 100) - 100 Complete formula
```

3. Click the aggregation function for which you want to display the raw data in a table below the formula.

The table displays a maximum of 10 rows and by default not more than 6 columns (you can customize the number of displayed columns) of raw data from the Target database. The columns correspond to the fields of the entity on which the function is built. For example: sum (defects, defect.severity = "High") gives a result set showing the field of the defects entity.

The initial sorting of the table is by the first column.

Number of Escaped Defects in period Current | 29 # ↑ ⚠


COUNT (Defect, ...) Complete formula

Defect 10 records out of 29 To view the full record set use Export to CSV.

DETECTED_DATE	ACTUAL_FIX_TIME	CLOSED_DATE	DEFECT_SUMMARY	ESTIMATED_FIX_TIME	FLAG_REPRODUCE
2013-11-02 00:00:00.0	38	2014-08-03 00:00:00.0		11	N
2013-11-02 00:00:00.0	3	2013-10-03 00:00:00.0		39	Y
2013-11-04 00:00:00.0	37	2014-03-05 00:00:00.0		34	N
2013-11-04 00:00:00.0	16	2013-08-05 00:00:00.0		16	Y
2013-11-05 00:00:00.0	40	2012-10-07 00:00:00.0		24	N
2013-11-05 00:00:00.0	16	2014-04-05 00:00:00.0		13	Y
2013-11-05 00:00:00.0	32	2013-04-06 00:00:00.0		16	N
2013-11-05 00:00:00.0	24	2013-06-07 00:00:00.0		43	Y
2013-11-05 00:00:00.0	4	2014-02-06 00:00:00.0		22	N
2013-11-06 00:00:00.0	18	2013-03-08 00:00:00.0		15	N

Export CSV Print Share Comment

You can sort the columns and sort the table to view additional information from the database.

To view the complete list of raw data, click .

## View the SQL query details


To view the SQL phrase that is executed in the database and the relevant database connection details (DB server and DB schema):

1. Move the cursor over the relevant item in the KPI, Metric, or Scorecard component in the Dashboard page. In the tooltip that opens, click **Explore...** The Explorer tab opens for the selected item.

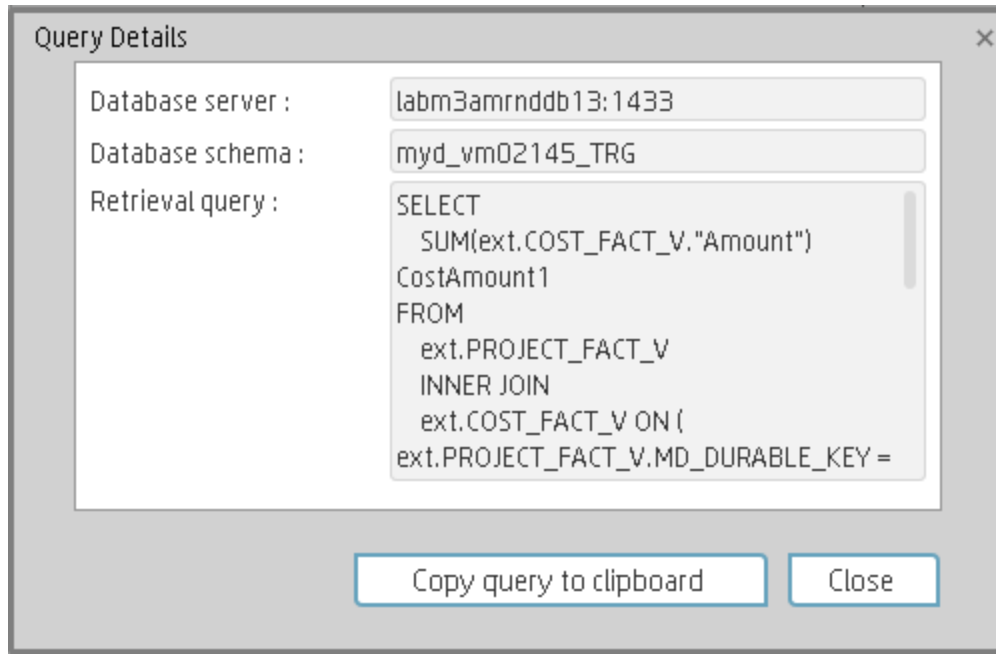
Or click the **Explorer** tab to display the Active KPIs tree, and by clicking the relevant KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI in the tree, display detailed information about the selected item in the Explorer tab.

2. Click the **Data Set** button.

The formula used to calculate the KPI or Metric is displayed at the top of the page. The aggregation functions that appear in the formula have a blue background.

3. Click the relevant aggregation function and then click . A dialog box opens and displays the name of the machine on which the database is installed followed by the port used, the

name of the Target schema, and the SQL query that is run to perform the calculation corresponding to the function currently highlighted in the formula.




## Export raw data to a .csv file

To export the raw data to a .csv file:

1. Click the **Explorer** tab to display the Active KPIs tree, and by clicking the relevant Objective, KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI in the tree, display detailed information about the selected item in the Explorer tab.
2. Click the **Data Set** button.

The formula used to calculate the KPI or Metric is displayed at the top of the page. The aggregation functions that appear in the formula have a blue background.

PERCENTAGE\_MATH ( SUM (Cost.Amount, ...), SUM (Cost.Amount, ...), 100) - 100 [Complete formula](#)

3. Click  (or link) to export all the data included in the Target database table (not just the data displayed in the GUI table) that is used to calculate the function that is currently highlighted in the formula to a file in .csv format. It opens your list of directories where you can select where to save the .csv file you are creating.

Depending on the settings of your browser, the file may be automatically saved to a predetermined download directory.

## View the key elements of the percentage formula

To view a detailed description of the percentage formula:

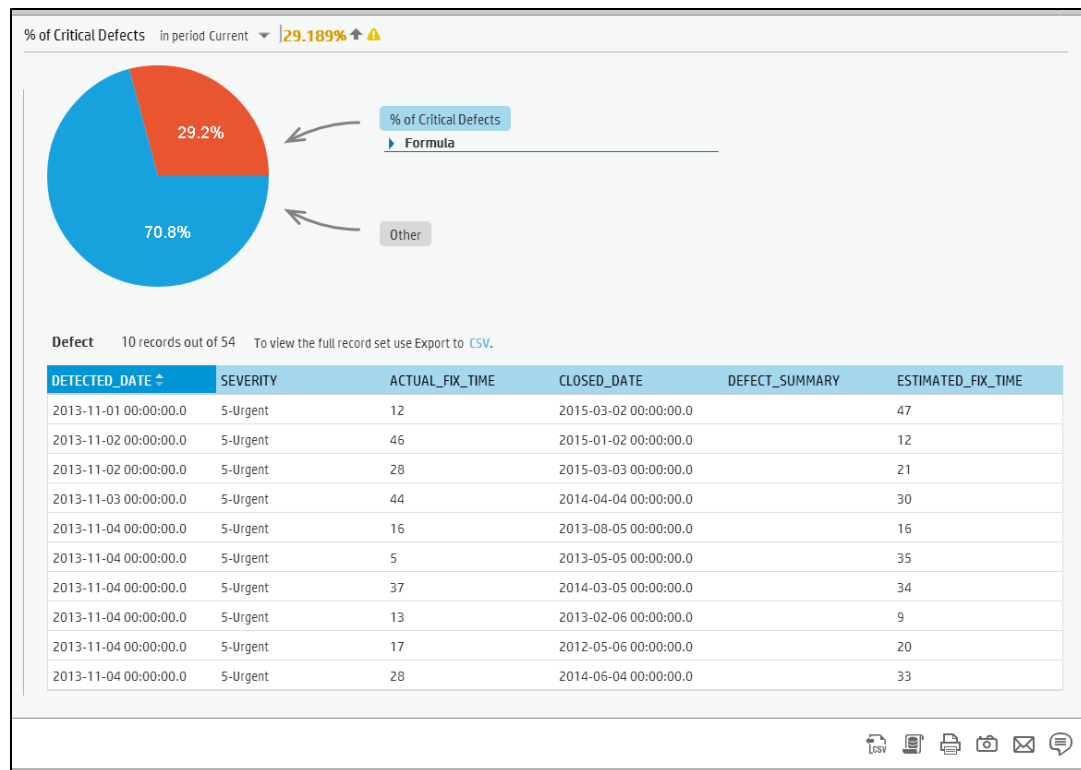
1. Move the cursor over the relevant item in the KPI, Metric, or Scorecard component in the Dashboard page. In the tooltip that opens, click **Explore...**. The Explorer tab opens for the selected item.

Or click the **Explorer** tab to display the Active KPIs tree, and by clicking the relevant Objective, KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI in the tree, display detailed information about the selected item in the Explorer tab.


2. Click the **Data Set** button.

The formula used to calculate the KPI or Metric is displayed at the top of the page. The aggregation functions that appear in the formula have a blue background. The pie shows the information corresponding to the general section of the percentage formula and to all other data.

The filter describes the filter formula. For details, see ["Data Set" on page 405](#).



## Send the contents of the Data Set page by Email


1. In the Explorer tab, click the relevant item in the Active KPIs tree and click **Data Set**.
2. To 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.

For additional details, see ["Explorer Tab - Data Set" below](#).

**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 [Movies](#).


## Export the contents of the Data Set page to a PDF file

1. In the Explorer tab, click the relevant item in the Active KPIs tree and click **Data Set**.
2. To export the contents of the Data Set page to a PDF file, click the **Save snapshot**  icon.

For additional details, see ["Explorer Tab - Data Set" below](#).

**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 [Movies](#).

## Print the contents of the Data Set page

1. In the Explorer tab, click the relevant item in the Active KPIs tree and click **Data Set**.
2. To print the contents of the Data Set page, click the **Print**  icon.

For additional details, see ["Explorer Tab - Data Set" below](#).

**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 [Movies](#).

## UI Description

### Explorer Tab - Data Set

**Note:** When in Executive Scorecard, you navigate to another tab and then return to the Explorer tab, the details of the item that was previously in focus are displayed again. However, its properties might be refreshed.

The Explorer tab includes the following areas:

["Active KPIs" on the next page](#)

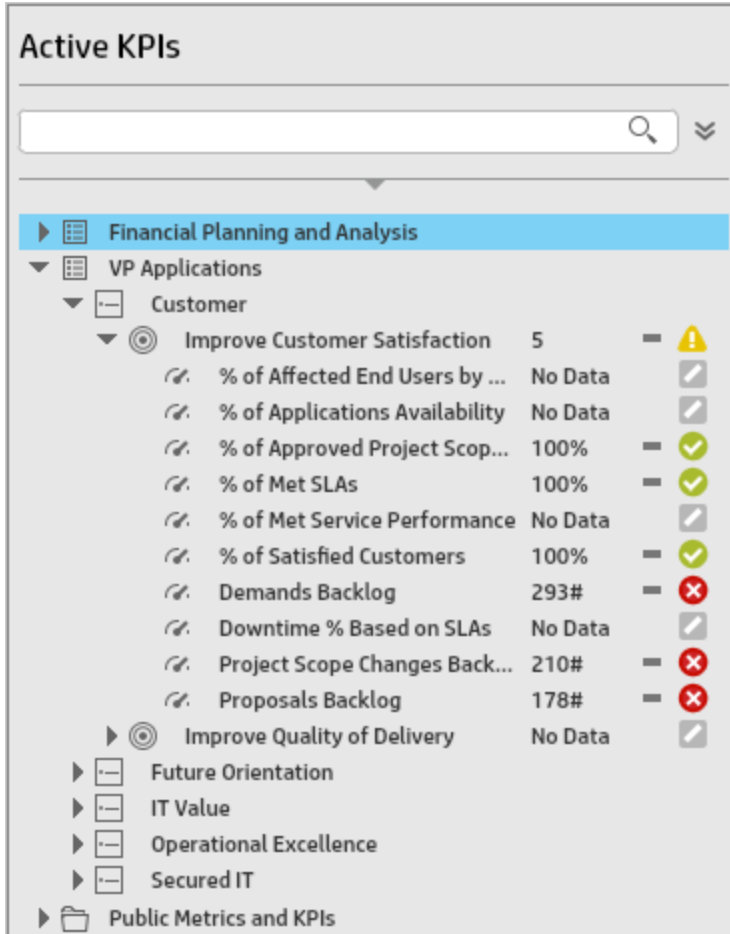
["Data Set" on page 405](#)



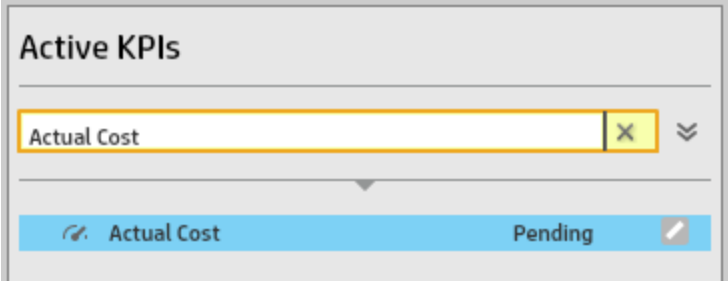
"Toolbar" on page 412






"Additional Buttons in Toolbar" on page 413

### Active KPIs



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

UI Element	Description
<p>🔍 &lt;Search&gt;</p>	<p>Enter the relevant string to display, in the tree, the nodes whose name includes the string.</p> <p>In addition, the child nodes of the filtered nodes are also listed even when the child node names do not include the string.</p> <p>If the display is filtered (in case you accessed the Explorer from one of the components in the Dashboard), the &lt;Search&gt; box displays information about the filter. For example:</p> 
<p>⌵</p>	<p><b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:</p> <ul style="list-style-type: none"> <li>• <b>Status:</b> Select one of the <b>All</b>, <b>Good</b>, <b>Warning</b>, <b>Critical</b>, or <b>No Data</b> values to display only the elements with the selected status, in the Active KPIs area. When you select <b>No Data</b>, the search returns only the elements with no data.</li> <li>• <b>Type:</b> Select: <ul style="list-style-type: none"> <li>▪ <b>All.</b> To display all the elements in the tree with the selected status.</li> <li>▪ <b>KPI.</b> To display only the KPIs with the selected status.</li> <li>▪ <b>Metric.</b> To display a list of all the Metrics (the Status is changed to <b>All</b>). If you had selected a value in Status, and then you select <b>Metric</b>, then the Status field displays <b>All</b>, and becomes inaccessible.</li> <li>▪ <b>Objective.</b> To display only the Objectives with the selected status, and their KPIs.</li> </ul> </li> </ul>

UI Element	Description
<b>Active KPIs</b>	<p>Depending on how you accessed the Explorer tab, the pane lists all the Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, and Unassigned KPIs, active in the HP IT Executive Scorecard or a subset of these items.</p> <p>The list of Scorecards that is displayed corresponds to the Scorecards that are permitted for your user. For details about permissions, see <a href="#">User Management</a> in the <i>IT Executive Scorecard Administrator Guide</i>.</p> <div data-bbox="428 617 1370 758" style="background-color: #f0f0f0; padding: 10px;"><p><b>Note:</b> A Scorecard Administrator who wants to see a newly created Scorecard in Explorer (and who has the correct permissions to see the Scorecard), needs to refresh the Explorer using the <b>Refresh</b> button to display the Scorecard.</p></div> <p>Click one of the Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs to display their detailed information in the other pane.</p> <p>The area also displays on the right side of the Active KPIs pane, a subset of the following items depending on the type of item you selected:</p> <ul style="list-style-type: none"><li>• The name of the item.</li><li>• The value of the item.</li><li>•  The trend icon indicates the trend of the value calculated over the current period.</li><li>• The status of the item, during the current period. It can be:<ul style="list-style-type: none"><li>▪  indicates that the status is <b>Good</b>.</li><li>▪  indicates that the status is <b>Warning</b>.</li><li>▪  indicates that the status is <b>Critical</b>.</li><li>▪  indicates that the status is <b>Pending</b> and that the calculations have not yet been performed or completed.</li></ul></li></ul>

## Data Set

Number of Escaped Defects in period Current | 29 # ↑ ⚠

COUNT (Defect, ...) Complete formula






Defect 10 records out of 29 To view the full record set use Export to CSV.

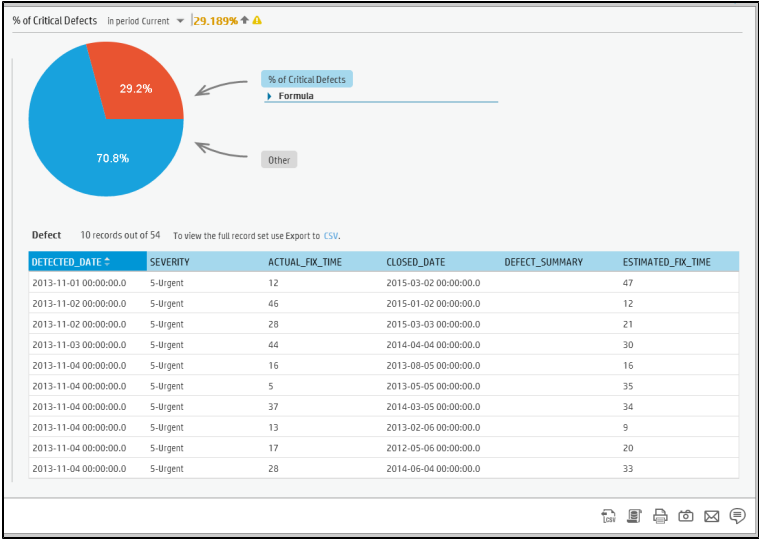
DETECTED_DATE	ACTUAL_FIX_TIME	CLOSED_DATE	DEFECT_SUMMARY	ESTIMATED_FIX_TIME	FLAG_REPRODUCE
2013-11-02 00:00:00.0	38	2014-08-03 00:00:00.0		11	N
2013-11-02 00:00:00.0	3	2013-10-03 00:00:00.0		39	Y
2013-11-04 00:00:00.0	37	2014-03-05 00:00:00.0		34	N
2013-11-04 00:00:00.0	16	2013-08-05 00:00:00.0		16	Y
2013-11-05 00:00:00.0	40	2012-10-07 00:00:00.0		24	N
2013-11-05 00:00:00.0	16	2014-04-05 00:00:00.0		13	Y
2013-11-05 00:00:00.0	32	2013-04-06 00:00:00.0		16	N
2013-11-05 00:00:00.0	24	2013-06-07 00:00:00.0		43	Y
2013-11-05 00:00:00.0	4	2014-02-06 00:00:00.0		22	N
2013-11-06 00:00:00.0	18	2013-03-08 00:00:00.0		15	N

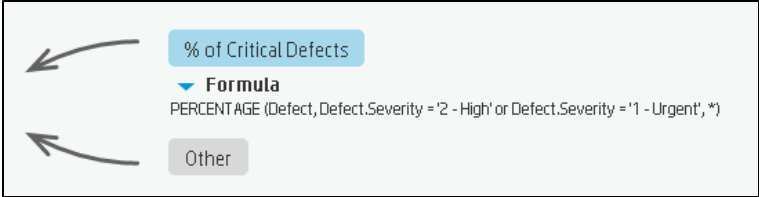

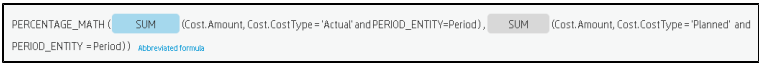
CSV PDF Print Share Email Chat

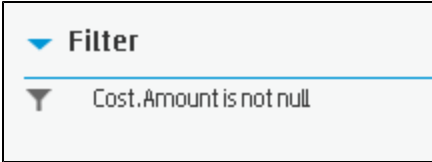



- **<Analysis area>**

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

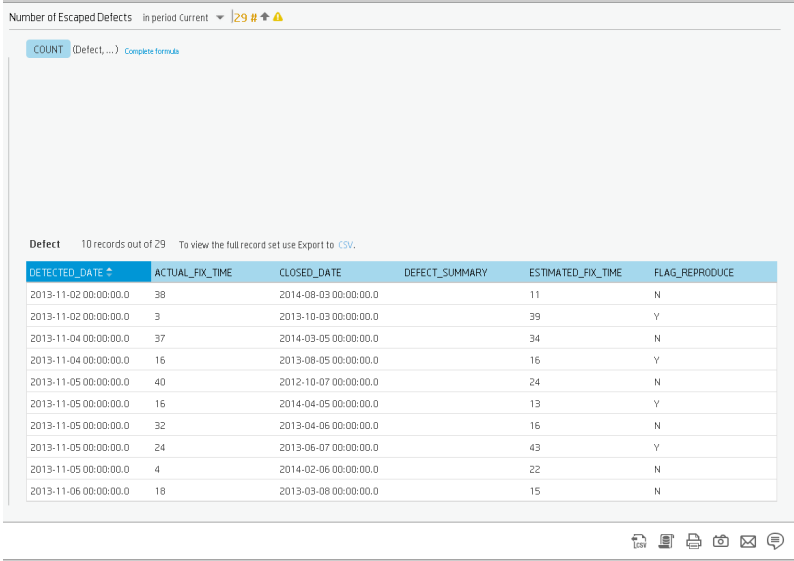
UI Element	Description
<p>&lt;Name&gt; in period &lt;Selection&gt; &lt;Value&gt; &lt;Trend&gt; &lt;Status&gt;</p>	<div data-bbox="558 323 1383 422" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Number of Escaped Defects in period Current ▾   29 # ↑ ⚠</p> </div> <p>The title lists:</p> <ul style="list-style-type: none"> <li>■ The name of the selected item (KPI, KPI Breakdown, Unassigned KPI, or, Metric, or Metric Breakdown).</li> <li>■ <b>&lt;Name&gt;</b>. The name of the selected item (KPI, KPI Breakdown, Unassigned KPI, or, Metric, or Metric Breakdown).</li> <li>■ <b>in period &lt;Selection&gt;</b>. Select the period you want to display. You can select: <ul style="list-style-type: none"> <li>○ <b>Current</b>. The title of the page displays the current value, trend, and status of the selected item.</li> <li>○ <b>Last Closed</b>. The title of the page displays the value, trend, and status of the selected item for the last completed calculation period.</li> <li>○ A list of periods when the value of the selected item was calculated.</li> </ul> </li> <li>■ <b>Value</b>. The value of the selected item.</li> <li>■ <b>Trend</b>.  The trend icon indicates the trend of the value of the selected item in the selected period compared to its value in the previous period.</li> <li>■ <b>Status</b>. The status of the KPI, KPI Breakdown (Metrics, and Metric Breakdowns do not have a status), during the current period. It can be: <ul style="list-style-type: none"> <li>○  indicates that the status is <b>Good</b>.</li> <li>○  indicates that the status is <b>Warning</b>.</li> <li>○  indicates that the status is <b>Critical</b>.</li> <li>○  indicates that the status is <b>Pending</b> or <b>No data</b>, meaning that the calculation of the status was not yet completed or the status was not calculated or that there was an error in the calculation.</li> </ul> </li> </ul>

UI Element	Description																																																																		
<p><b>&lt;Formula&gt;</b></p>	<p>The formula used to calculate the KPI or Metric is displayed at the top of the page. The aggregation functions that appear in the formula have a blue background.</p> <div data-bbox="558 453 1312 506" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>PERCENTAGE_MATH ( SUM (Cost.Amount, ...), SUM (Cost.Amount, ...), 100) - 100 <a href="#">Complete formula</a></p> </div> <p>Move the cursor above that area to display the value of that function.</p> <div data-bbox="558 604 1312 657" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>PERCENTAGE_MATH ( 4,174,502 (Cost.Amount, ...), SUM (Cost.Amount, ...), 100) - 100 <a href="#">Complete formula</a></p> </div> <p>When the formula uses a PERCENTAGE aggregative function, the display shows a pie char:</p> <div data-bbox="558 793 1312 1329" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">  <p>The screenshot shows a dashboard for '% of Critical Defects' in the 'Current' period, with a value of 29.189%. A pie chart displays 29.2% in red and 70.8% in blue. A legend identifies the red slice as '% of Critical Defects' and the blue slice as 'Other'. Below the chart is a table of defect records with columns: DETECTED_DATE, SEVERITY, ACTUAL_FIX_TIME, CLOSED_DATE, DEFECT_SUMMARY, and ESTIMATED_FIX_TIME.</p> <table border="1" data-bbox="581 1041 1289 1268"> <thead> <tr> <th>DETECTED_DATE</th> <th>SEVERITY</th> <th>ACTUAL_FIX_TIME</th> <th>CLOSED_DATE</th> <th>DEFECT_SUMMARY</th> <th>ESTIMATED_FIX_TIME</th> </tr> </thead> <tbody> <tr><td>2013-11-01 00:00:00.0</td><td>5-Urgent</td><td>12</td><td>2015-03-02 00:00:00.0</td><td></td><td>47</td></tr> <tr><td>2013-11-02 00:00:00.0</td><td>5-Urgent</td><td>46</td><td>2015-01-02 00:00:00.0</td><td></td><td>12</td></tr> <tr><td>2013-11-02 00:00:00.0</td><td>5-Urgent</td><td>28</td><td>2015-03-03 00:00:00.0</td><td></td><td>21</td></tr> <tr><td>2013-11-03 00:00:00.0</td><td>5-Urgent</td><td>44</td><td>2014-04-04 00:00:00.0</td><td></td><td>30</td></tr> <tr><td>2013-11-04 00:00:00.0</td><td>5-Urgent</td><td>16</td><td>2013-08-05 00:00:00.0</td><td></td><td>16</td></tr> <tr><td>2013-11-04 00:00:00.0</td><td>5-Urgent</td><td>5</td><td>2013-05-05 00:00:00.0</td><td></td><td>35</td></tr> <tr><td>2013-11-04 00:00:00.0</td><td>5-Urgent</td><td>37</td><td>2014-03-05 00:00:00.0</td><td></td><td>34</td></tr> <tr><td>2013-11-04 00:00:00.0</td><td>5-Urgent</td><td>13</td><td>2013-02-06 00:00:00.0</td><td></td><td>9</td></tr> <tr><td>2013-11-04 00:00:00.0</td><td>5-Urgent</td><td>17</td><td>2012-05-06 00:00:00.0</td><td></td><td>20</td></tr> <tr><td>2013-11-04 00:00:00.0</td><td>5-Urgent</td><td>28</td><td>2014-06-04 00:00:00.0</td><td></td><td>33</td></tr> </tbody> </table> </div> <p><b>Limitations:</b></p> <ul style="list-style-type: none"> <li>■ KPI or Metric formulas that use the <b>PERCENTAGE_MATH</b> mathematical function have a display similar to the other mathematical functions (see above for a picture of the typical display) and do not display a pie.</li> <li>■ Percentages where the dividend is a subset of the divisor can be represented as a pie. <b>PERCENTAGE(Defect, Defect.Severity='Urgent', Defect.Severity='Urgent' or Defect.Severity='Warning', 0)</b> If the dividend is not a subset of the divisor it cannot be</li> </ul>	DETECTED_DATE	SEVERITY	ACTUAL_FIX_TIME	CLOSED_DATE	DEFECT_SUMMARY	ESTIMATED_FIX_TIME	2013-11-01 00:00:00.0	5-Urgent	12	2015-03-02 00:00:00.0		47	2013-11-02 00:00:00.0	5-Urgent	46	2015-01-02 00:00:00.0		12	2013-11-02 00:00:00.0	5-Urgent	28	2015-03-03 00:00:00.0		21	2013-11-03 00:00:00.0	5-Urgent	44	2014-04-04 00:00:00.0		30	2013-11-04 00:00:00.0	5-Urgent	16	2013-08-05 00:00:00.0		16	2013-11-04 00:00:00.0	5-Urgent	5	2013-05-05 00:00:00.0		35	2013-11-04 00:00:00.0	5-Urgent	37	2014-03-05 00:00:00.0		34	2013-11-04 00:00:00.0	5-Urgent	13	2013-02-06 00:00:00.0		9	2013-11-04 00:00:00.0	5-Urgent	17	2012-05-06 00:00:00.0		20	2013-11-04 00:00:00.0	5-Urgent	28	2014-06-04 00:00:00.0		33
DETECTED_DATE	SEVERITY	ACTUAL_FIX_TIME	CLOSED_DATE	DEFECT_SUMMARY	ESTIMATED_FIX_TIME																																																														
2013-11-01 00:00:00.0	5-Urgent	12	2015-03-02 00:00:00.0		47																																																														
2013-11-02 00:00:00.0	5-Urgent	46	2015-01-02 00:00:00.0		12																																																														
2013-11-02 00:00:00.0	5-Urgent	28	2015-03-03 00:00:00.0		21																																																														
2013-11-03 00:00:00.0	5-Urgent	44	2014-04-04 00:00:00.0		30																																																														
2013-11-04 00:00:00.0	5-Urgent	16	2013-08-05 00:00:00.0		16																																																														
2013-11-04 00:00:00.0	5-Urgent	5	2013-05-05 00:00:00.0		35																																																														
2013-11-04 00:00:00.0	5-Urgent	37	2014-03-05 00:00:00.0		34																																																														
2013-11-04 00:00:00.0	5-Urgent	13	2013-02-06 00:00:00.0		9																																																														
2013-11-04 00:00:00.0	5-Urgent	17	2012-05-06 00:00:00.0		20																																																														
2013-11-04 00:00:00.0	5-Urgent	28	2014-06-04 00:00:00.0		33																																																														

UI Element	Description
	<p>represented as a pie.</p> <p><b>PERCENTAGE(Defect, Defect.Severity='Urgent', Defect.Severity='Warning', 0)</b></p> <ul style="list-style-type: none"> <li>It is also recommended to change the PERCENTAGE function into a RATIO function. For example, the following PERCENTAGE formula cannot be represented by a pie.</li> </ul> <p>The formula used to calculate the KPI or Metric is displayed at the top of the page. The aggregation functions that appear in the formula have a blue background. The pie has two sections: the top section (&lt;<b>KPI_or_Metric_name</b>&gt;) represents the value of the KPI or Metric; the bottom section (<b>other</b>) represents: <b>100% - &lt;KPI_or_Metric_value&gt;</b>.</p> <p>The section that represents the value of the KPI is:</p> <ul style="list-style-type: none"> <li>Red for a KPI when the KPI threshold definition has a <b>minimize</b> configuration (meaning that the status is good when the KPI value is low).</li> <li>Blue for a KPI when the KPI threshold definition has a <b>maximize</b> configuration (meaning that the status is good when the KPI value is high), or for a Metric.</li> </ul> <p>Expand <b>Formula</b> to display the formula.</p> 
<p><b>Complete formula/ Abbreviated formula</b></p>	<p>Click <b>Complete formula</b> to display the whole formula.</p>  <p>Click <b>Abbreviated formula</b> to display the truncated formula.</p> 

UI Element	Description
<p><b>&lt;Filter formula&gt;</b></p>	<p>The filter configured for the KPI or Metric. The contents of the filter are not shown by default. Click <b>Filter</b> to expand and display the filter contents.</p> <div data-bbox="558 453 987 613" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div> <p>This icon  displayed in the filter indicates that the filter is for a KPI or a Metric.</p> <p>This icon  displayed in the filter indicates that the filter is for a KPI Breakdown or a Metric Breakdown.</p> <div data-bbox="558 852 1385 936" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div> <p>When the filter includes both global and partial filter structures, you can filter a KPI or Metric both globally and partially by clicking on each section of the filter: <b>&lt;global_filter&gt; and &lt;partial_filter&gt;.</b></p>




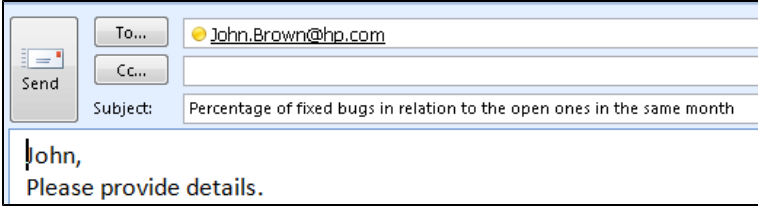


UI Element	Description
<p>&lt;Analysis area&gt;</p>	<p>Click the relevant function in the formula.</p> <p>The analysis area displays:</p> <ul style="list-style-type: none"> <li>■ The formula with the function you have selected.</li> <li>■ The table displays a maximum of 10 rows and by default not more than 6 columns (you can customize the number of displayed columns) of raw data from the Target database. The columns correspond to the fields of the entity on which the function is built. For example: sum (defects, defect.severity = "High") gives a result set showing the field of the defects entity.</li> </ul> <p>The initial sorting of the table is by the first column.</p>  <p>The table of raw data has the following capabilities:</p> <ul style="list-style-type: none"> <li>■ <b>Sort the table.</b> To sort the table by column to view additional information, click the relevant column title.</li> </ul>



UI Element	Description																																																																																																																																			
	<div data-bbox="587 321 1385 613" data-label="Table"> <p>Cost 10 records out of 151,200 To view the full record set use Export to CSV.</p> <table border="1"> <thead> <tr> <th>Amount</th> <th>CostType</th> <th>COST_LOC</th> <th>CURRENCY_BASE</th> <th>CURRENCY_LOC</th> <th>EXPENSE_STATUS</th> </tr> </thead> <tbody> <tr><td>0.9654711507936508</td><td>Actual</td><td>6.603769841269842</td><td>USD</td><td>CNY</td><td>INCURRED</td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td>6.603769841269842</td><td>USD</td><td>CNY</td><td>INCURRED</td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td>6.603769841269842</td><td>USD</td><td>CNY</td><td>INCURRED</td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td>6.603769841269842</td><td>USD</td><td>CNY</td><td>INCURRED</td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td>6.603769841269842</td><td>USD</td><td>CNY</td><td>INCURRED</td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td>6.603769841269842</td><td>USD</td><td>CNY</td><td>INCURRED</td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td>6.603769841269842</td><td>USD</td><td>CNY</td><td>INCURRED</td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td>6.603769841269842</td><td>USD</td><td>CNY</td><td>INCURRED</td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td>6.603769841269842</td><td>USD</td><td>CNY</td><td>INCURRED</td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td>6.603769841269842</td><td>USD</td><td>CNY</td><td>INCURRED</td></tr> </tbody> </table> </div> <p>■ <b>Display or hide columns.</b> Right-click one of the column headers to display a list of all the available columns. Click the relevant column name in the list to display it or remove it from the display:</p> <div data-bbox="587 779 1385 1230" data-label="Complex-Block"> <table border="1"> <thead> <tr> <th>Amount</th> <th>CostType</th> <th>COST_LOC</th> </tr> </thead> <tbody> <tr><td>0.9654711507936508</td><td>Actual</td><td></td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td></td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td></td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td></td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td></td></tr> <tr><td>0.9654711507936508</td><td>Actual</td><td></td></tr> </tbody> </table> <div data-bbox="755 821 1385 1230" data-label="List-Group"> <p>Select visible columns</p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Amount</li> <li><input checked="" type="checkbox"/> CostType</li> <li><input checked="" type="checkbox"/> COST_LOC</li> <li><input checked="" type="checkbox"/> CURRENCY_BASE</li> <li><input checked="" type="checkbox"/> CURRENCY_LOC</li> <li><input checked="" type="checkbox"/> EXPENSE_STATUS</li> <li><input type="checkbox"/> ExpenseType</li> <li><input type="checkbox"/> FLAG_CLOSED</li> <li><input type="checkbox"/> IsDiscretionary</li> </ul> </div> </div> <p>○ <b>Copy and paste part of the table.</b></p> <ul style="list-style-type: none"> <li>○ Click and drag the cursor over the relevant cells of the table. The cells are highlighted.</li> </ul> <div data-bbox="683 1430 1385 1829" data-label="Table"> <p>Cost 10 records out of 151,200 To view the full record set use Export to CSV.</p> <table border="1"> <thead> <tr> <th>CostType</th> <th>COST_LOC</th> <th>Amount</th> <th>CURRENCY_BASE</th> </tr> </thead> <tbody> <tr><td>Actual</td><td>6.603769841269842</td><td>0.9654711507936508</td><td>USD</td></tr> <tr><td>Actual</td><td>6.603769841269842</td><td>0.9654711507936508</td><td>USD</td></tr> <tr><td>Actual</td><td>6.603769841269842</td><td>0.9654711507936508</td><td>USD</td></tr> <tr><td>Actual</td><td>6.603769841269842</td><td>0.9654711507936508</td><td>USD</td></tr> <tr><td>Actual</td><td>6.603769841269842</td><td>0.9654711507936508</td><td>USD</td></tr> <tr><td>Actual</td><td>6.603769841269842</td><td>0.9654711507936508</td><td>USD</td></tr> <tr><td>Actual</td><td>6.603769841269842</td><td>0.9654711507936508</td><td>USD</td></tr> <tr><td>Actual</td><td>6.603769841269842</td><td>0.9654711507936508</td><td>USD</td></tr> <tr><td>Actual</td><td>6.603769841269842</td><td>0.9654711507936508</td><td>USD</td></tr> <tr><td>Actual</td><td>6.603769841269842</td><td>0.9654711507936508</td><td>USD</td></tr> </tbody> </table> </div>	Amount	CostType	COST_LOC	CURRENCY_BASE	CURRENCY_LOC	EXPENSE_STATUS	0.9654711507936508	Actual	6.603769841269842	USD	CNY	INCURRED	0.9654711507936508	Actual	6.603769841269842	USD	CNY	INCURRED	0.9654711507936508	Actual	6.603769841269842	USD	CNY	INCURRED	0.9654711507936508	Actual	6.603769841269842	USD	CNY	INCURRED	0.9654711507936508	Actual	6.603769841269842	USD	CNY	INCURRED	0.9654711507936508	Actual	6.603769841269842	USD	CNY	INCURRED	0.9654711507936508	Actual	6.603769841269842	USD	CNY	INCURRED	0.9654711507936508	Actual	6.603769841269842	USD	CNY	INCURRED	0.9654711507936508	Actual	6.603769841269842	USD	CNY	INCURRED	0.9654711507936508	Actual	6.603769841269842	USD	CNY	INCURRED	Amount	CostType	COST_LOC	0.9654711507936508	Actual		0.9654711507936508	Actual		0.9654711507936508	Actual		0.9654711507936508	Actual		0.9654711507936508	Actual		0.9654711507936508	Actual		CostType	COST_LOC	Amount	CURRENCY_BASE	Actual	6.603769841269842	0.9654711507936508	USD	Actual	6.603769841269842	0.9654711507936508	USD	Actual	6.603769841269842	0.9654711507936508	USD	Actual	6.603769841269842	0.9654711507936508	USD	Actual	6.603769841269842	0.9654711507936508	USD	Actual	6.603769841269842	0.9654711507936508	USD	Actual	6.603769841269842	0.9654711507936508	USD	Actual	6.603769841269842	0.9654711507936508	USD	Actual	6.603769841269842	0.9654711507936508	USD	Actual	6.603769841269842	0.9654711507936508	USD
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UI Element	Description
	<ul style="list-style-type: none"> <li>◦ Click <code>Ctrl + C</code>.</li> <li>◦ Go to the location where you want to paste the data and click <code>Ctrl + V</code>.</li> <li>▪ <b>Reorder columns.</b> You can change the location of columns, by clicking the relevant column header and dragging it to the relevant location.</li> </ul>

## • Toolbar


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


UI Element	Description
	<p><b>Send mail.</b> Opens an Outlook email, with the owner of the selected Objective, KPI, Metric listed in the <b>To</b> box, <b>Regarding: &lt;Item_name&gt;</b> in the <b>Subject</b> box, and enter the text you want in the body of the email.</p> 
	<p><b>Save snapshot.</b> Captures the current view in Explorer (all of it) in a new window. A dialog box opens to ask you where you want to save the image.</p>
	<p><b>Print.</b> Displays the Print dialog box where you can select the printer and how to print the content of the corresponding Explorer tab.</p> <p>The printout includes:</p> <ul style="list-style-type: none"> <li>▪ The contents of the area that was selected while you clicked the button.</li> <li>▪ The Annotations Area.</li> </ul>

UI Element	Description
	<p><b>Show/Hide Annotations.</b> The button is enabled only for Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPI. It opens a box where you can add your annotation or hide them after viewing. For details, see <a href="#">"Annotations" on page 428</a>.</p> <p>Click the button again to close the Annotation area.</p> <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p><b>Note:</b> The <b>Show/Hide Annotations</b> icon with a little + sign  in the bottom toolbar indicates that a new annotation was added to the selected item during the past week.</p> <p>The number of days during which the annotations are considered to be new is a setting that is configurable by your administrator in <b>Admin &gt; Scorecard &gt; Dashboard Settings &gt; Number of days annotations are considered new</b>. For example, if the administrator gives the setting the value <b>14</b>, then the + sign will indicate that the annotation was added in the last 2 weeks. The default is a week.</p> </div>

- **Additional Buttons in Toolbar**

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

UI Element	Description
	<p><b>Export to .csv.</b> Click to export all the data included in the Target database table (not just the data displayed in the GUI table) that is used to calculate the function that is currently highlighted in the formula to a file in .csv format.</p> <p>It opens your list of directories where you can select the location of the .CSV file you are creating. Depending on the settings of your browser, the file may be automatically saved to a predetermined download directory.</p>

UI Element	Description						
	<p><b>Display SQL.</b> Click to show the SQL query that runs to calculate the function that is currently highlighted in the formula. It also displays the name of the database server and the name of the schema used by the SQL query.</p> <div data-bbox="448 489 1378 1094"><p>Query Details <span>✕</span></p><table><tr><td>Database server :</td><td>labm3amrddb13:1433</td></tr><tr><td>Database schema :</td><td>myd_vm02145_TRG</td></tr><tr><td>Retrieval query :</td><td><pre>SELECT   SUM(ext.COST_FACT_V."Amount") CostAmount1 FROM   ext.PROJECT_FACT_V INNER JOIN   ext.COST_FACT_V ON ( ext.PROJECT_FACT_V.MD_DURABLE_KEY =</pre></td></tr></table><p><a href="#">Copy query to clipboard</a> <a href="#">Close</a></p></div> <p><b>Copy query to Clipboard.</b> Click to copy the contents of Retrieval query to the clipboard.</p>	Database server :	labm3amrddb13:1433	Database schema :	myd_vm02145_TRG	Retrieval query :	<pre>SELECT   SUM(ext.COST_FACT_V."Amount") CostAmount1 FROM   ext.PROJECT_FACT_V INNER JOIN   ext.COST_FACT_V ON ( ext.PROJECT_FACT_V.MD_DURABLE_KEY =</pre>
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# Goal Map

The Goal Map in the Explorer tab provides a tree of nodes that represents the display of the impact of the selected KPI, or KPI Breakdown on the relevant Objectives, Perspectives, and Scorecards.

The elements that are displayed corresponds to the elements that are permitted for your user. For details about permissions, see [User Management](#) in the *IT Executive Scorecard Administrator Guide*.

## To access:

Click the **Explorer** tab to access detailed information about all the Scorecards, Objectives, Perspectives, KPIs, KPI Breakdowns, Metric, or Metric Breakdown that are active in Executive Studio. In the Explorer tab, click the relevant item and click the **Goal Map** button.

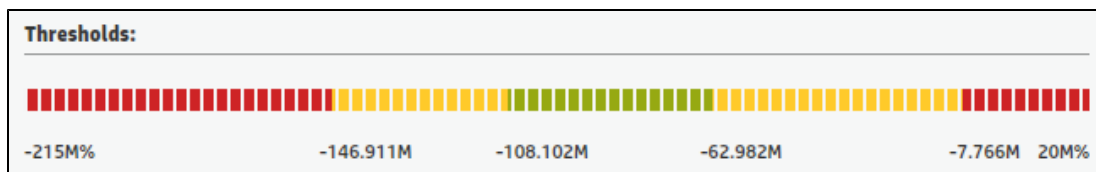
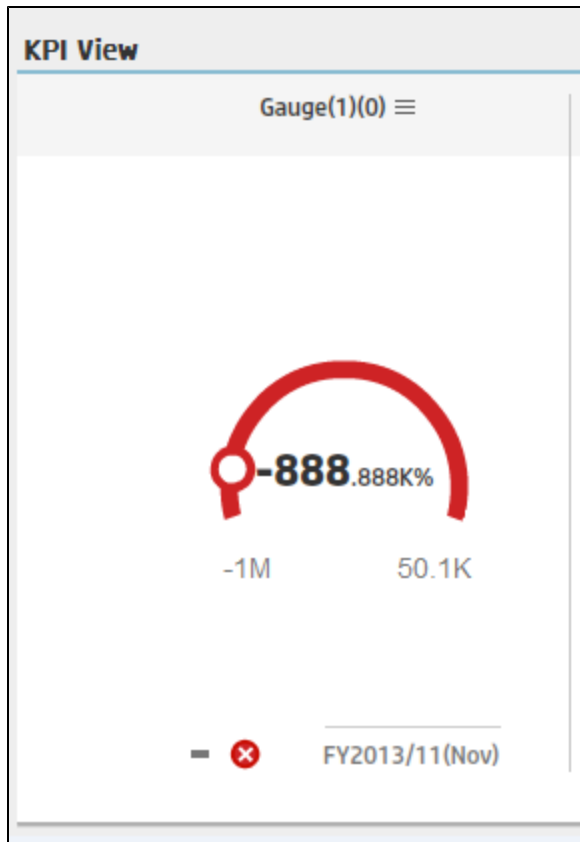
Section navigation: ● ["Tasks" on the next page](#) ● ["UI Description" on page 418](#)

## Learn More

### Decimal Precision

The decimal precision used in displays in Executive Scorecard is as follows:

- **Studio/Dashboard/Explorer Active Tree/Thresholds in Explorer.** The values of KPIs and Metrics are displayed with a maximum of 6 digits and if needed a decimal point. Digits after the decimal point are rounded to 3 digits maximum. Digits before the decimal point are rounded to 3 digits maximum and K, M, or T are used to indicate the correct value. For example: 456.7893 is rounded to 456.789, 3300122.111 is displayed as 3.300 M, or 999999 is displayed as 999.999 K



- **Thresholds in Studio.**

Because the threshold fields in the Studio are where you enter the threshold values, the thresholds display all the digits before the decimal point. Nevertheless, if you configure a KPI threshold with more than 3 digits after the decimal point, they are rounded to 3 digits. For example:



## Tasks

This section includes:

["Access the Goal Map to display detailed information "](#) on the next page

["Send the contents of the Goal Map page by email"](#) on the next page

["Export the contents of the Goal Map page to a PDF file" below](#)

["Print the contents of the Goal Map page" below](#)

## Access the Goal Map to display detailed information


To view more detailed information for a selected KPI:

1. Move the cursor over the relevant item in the KPI or Scorecard component in the Dashboard page. In the tooltip that opens, click **Analyze**. The Explorer tab opens for the selected item.

Or click the **Explorer** tab to display the Active KPIs tree, and by clicking the relevant KPI, KPI Breakdown, or Unassigned KPI in the tree, display detailed information about the selected item in the Explorer tab.

2. Click the Goal Map button to display the tree of nodes that represents the display of the impact of the selected KPI, KPI Breakdown, or Unassigned KPI on the relevant Objectives, Perspectives, and Scorecards


## Send the contents of the Goal Map page by email

1. In the Explorer tab, click the relevant item in the Active KPIs tree and click **Goal Map**.
2. To 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.

**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](#).

## Export the contents of the Goal Map page to a PDF file

1. In the Explorer tab, click the relevant item in the Active KPIs tree and click **Goal Map**.
2. To export the contents of the Goal Map page to a PDF file, click the **Save snapshot**  icon.

For additional details, see ["Explorer Tab - Goal Map" on the next 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](#).

## Print the contents of the Goal Map page

1. In the Explorer tab, click the relevant item in the Active KPIs tree and click **Goal Map**.



2. To print the contents of the Goal Map page, click the **Print**  icon.

For additional details, see ["Explorer Tab - Goal Map" below](#).

**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](#).

## ***UI Description***

### **Explorer Tab - Goal Map**

**Note:** When in Executive Scorecard, you navigate to another tab and then return to the Explorer tab, the details of the item that was previously in focus are displayed again. However, its properties might be refreshed.

The Explorer - Goal Map page includes the following areas:

["Active KPIs" on the next page](#)

["Goal Map" on page 421](#)

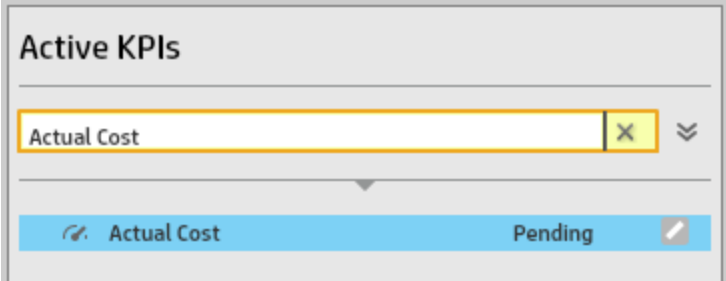
["Toolbar" on page 424](#)






### Active KPIs

The screenshot shows a dashboard titled "Active KPIs" with a search bar at the top. Below the search bar is a tree view of metrics. The "Financial Planning and Analysis" category is expanded, showing "VP Applications" and "Customer". Under "Customer", "Improve Customer Satisfaction" is selected, showing a value of 5 and a warning icon. Below it are several sub-metrics with values and status icons (checkmarks or X's). Other categories like "Future Orientation", "IT Value", "Operational Excellence", "Secured IT", and "Public Metrics and KPIs" are also visible.

Metric	Value	Status
Improve Customer Satisfaction	5	Warning
% of Affected End Users by ...	No Data	Checkmark
% of Applications Availability	No Data	Checkmark
% of Approved Project Scop...	100%	Checkmark
% of Met SLAs	100%	Checkmark
% of Met Service Performance	No Data	Checkmark
% of Satisfied Customers	100%	Checkmark
Demands Backlog	293#	Warning
Downtime % Based on SLAs	No Data	Checkmark
Project Scope Changes Back...	210#	Warning
Proposals Backlog	178#	Warning
Improve Quality of Delivery	No Data	Checkmark

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

UI Element	Description
<p>🔍 &lt;Search&gt;</p>	<p>Enter the relevant string to display, in the tree, the nodes whose name includes the string.</p> <p>In addition, the child nodes of the filtered nodes are also listed even when the child node names do not include the string.</p> <p>If the display is filtered (in case you accessed the Explorer from one of the components in the Dashboard), the &lt;Search&gt; box displays information about the filter. For example:</p> 
<p>⌵</p>	<p><b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:</p> <ul style="list-style-type: none"> <li>• <b>Status:</b> Select one of the <b>All</b>, <b>Good</b>, <b>Warning</b>, <b>Critical</b>, or <b>No Data</b> values to display only the elements with the selected status, in the Active KPIs area. When you select <b>No Data</b>, the search returns only the elements with no data.</li> <li>• <b>Type:</b> Select: <ul style="list-style-type: none"> <li>▪ <b>All.</b> To display all the elements in the tree with the selected status.</li> <li>▪ <b>KPI.</b> To display only the KPIs with the selected status.</li> <li>▪ <b>Metric.</b> To display a list of all the Metrics (the Status is changed to <b>All</b>). If you had selected a value in Status, and then you select <b>Metric</b>, then the Status field displays <b>All</b>, and becomes inaccessible.</li> <li>▪ <b>Objective.</b> To display only the Objectives with the selected status, and their KPIs.</li> </ul> </li> </ul>

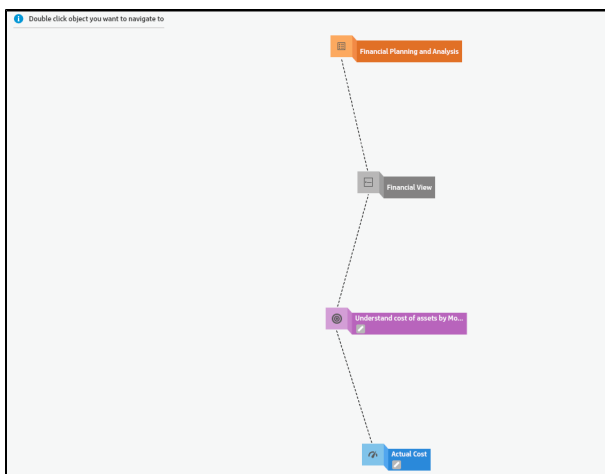
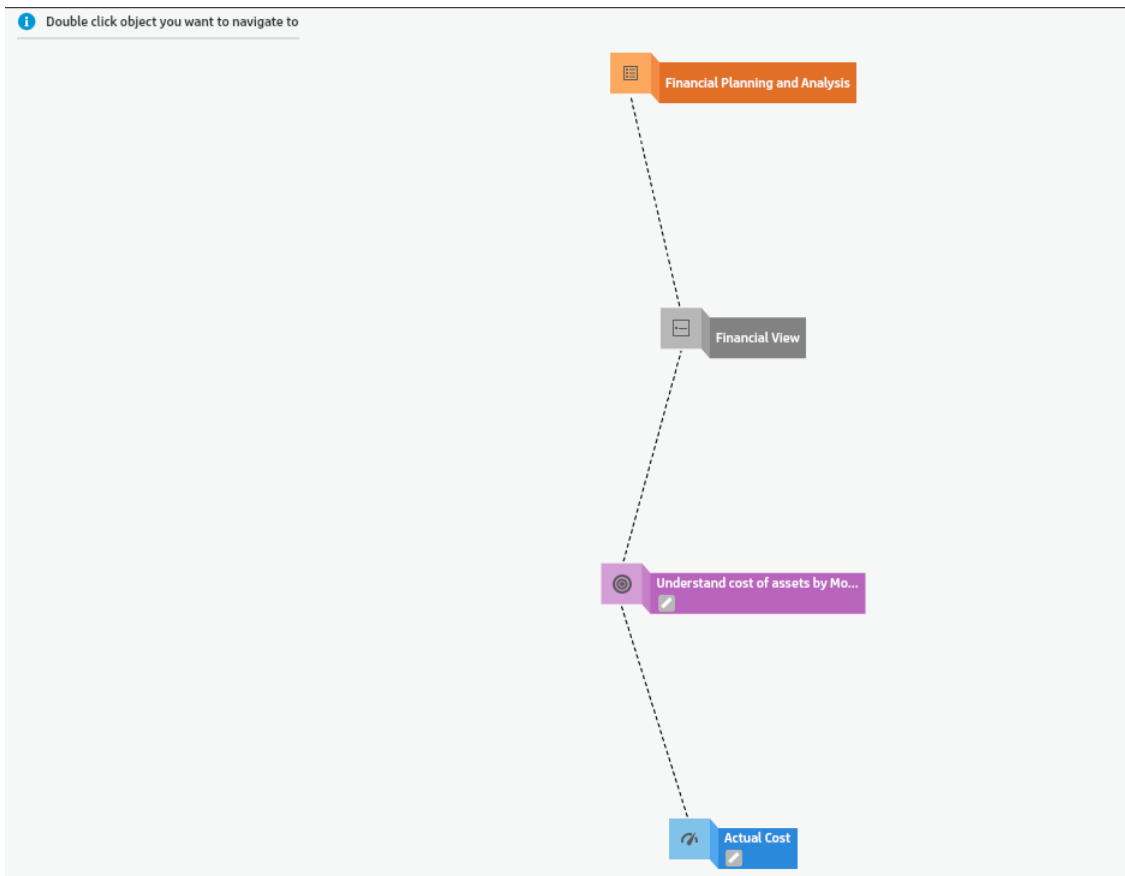
UI Element	Description
<p><b>Active KPIs</b></p>	<p>Depending on how you accessed the Explorer tab, the pane lists all the Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, and Unassigned KPIs, active in the HP IT Executive Scorecard or a subset of these items.</p> <p>The list of Scorecards that is displayed corresponds to the Scorecards that are permitted for your user. For details about permissions, see <a href="#">User Management</a> in the <i>IT Executive Scorecard Administrator Guide</i>.</p> <div style="background-color: #f0f0f0; padding: 10px; border: 1px solid #ccc;"> <p><b>Note:</b> A Scorecard Administrator who wants to see a newly created Scorecard in Explorer (and who has the correct permissions to see the Scorecard), needs to refresh the Explorer using the <b>Refresh</b> button to display the Scorecard.</p> </div> <p>Click one of the Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs to display their detailed information in the other pane.</p> <p>The area also displays on the right side of the Active KPIs pane, a subset of the following items depending on the type of item you selected:</p> <ul style="list-style-type: none"> <li>• The name of the item.</li> <li>• The value of the item.</li> <li>•  The trend icon indicates the trend of the value calculated over the current period.</li> <li>• The status of the item, during the current period. It can be:             <ul style="list-style-type: none"> <li>▪  indicates that the status is <b>Good</b>.</li> <li>▪  indicates that the status is <b>Warning</b>.</li> <li>▪  indicates that the status is <b>Critical</b>.</li> <li>▪  indicates that the status is <b>Pending</b> and that the calculations have not yet been performed or completed.</li> </ul> </li> </ul>

### Goal Map






The Goal Map displays the impact configuration only for the current period of the selected KPI, or KPI Breakdown.

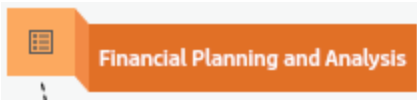

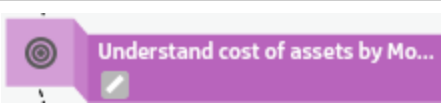
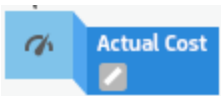
In addition, the display of the Goal Map depends on the user permission.

In the Goal Map, you can double-click an Objective, KPI, or KPI Breakdown to select it in the Active Tree and to display the Overview for the selected item and the current period.




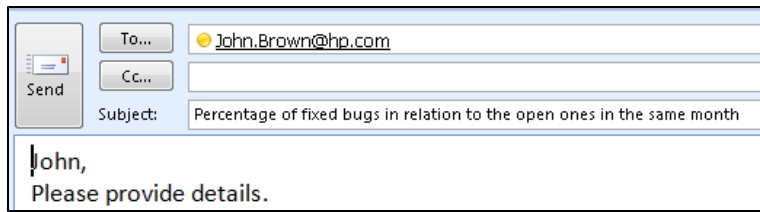

User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets>):




UI Element	Description
<p><b>&lt;Name&gt; in period &lt;Selection&gt;</b> <b>&lt;Value&gt; &lt;Trend&gt; &lt;Status&gt;</b></p>	<div data-bbox="755 304 1383 378" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">                     Number of Escaped Defects in period Current ▾   29 # ↑ ⚠                 </div> <p>The title lists:</p> <ul style="list-style-type: none"> <li>• The name of the selected item (KPI, KPI Breakdown, Unassigned KPI, or, Metric, or Metric Breakdown).</li> <li>• <b>&lt;Name&gt;</b>. The name of the selected item (KPI, KPI Breakdown, Unassigned KPI, or, Metric, or Metric Breakdown).</li> <li>• <b>in period &lt;Selection&gt;</b>. Select the period you want to display. You can select:                         <ul style="list-style-type: none"> <li>▪ <b>Current</b>. The title of the page displays the current value, trend, and status of the selected item.</li> <li>▪ <b>Last Closed</b>. The title of the page displays the value, trend, and status of the selected item for the last completed calculation period.</li> <li>▪ A list of periods when the value of the selected item was calculated.</li> </ul> </li> <li>• <b>Value</b>. The value of the selected item.</li> <li>• <b>Trend</b>.  The trend icon indicates the trend of the value of the selected item in the selected period compared to its value in the previous period.</li> <li>• <b>Status</b>. The status of the KPI, KPI Breakdown (Metrics, and Metric Breakdowns do not have a status), during the current period. It can be:                         <ul style="list-style-type: none"> <li>▪  indicates that the status is <b>Good</b>.</li> <li>▪  indicates that the status is <b>Warning</b>.</li> <li>▪  indicates that the status is <b>Critical</b>.</li> <li>▪  indicates that the status is <b>Pending or No data</b>, meaning that the calculation of the status was not yet completed or the status was not calculated or that there was an error in the</li> </ul> </li> </ul>

UI Element	Description
	calculation.
	Represents the parent Scorecard of the selected KPI, KPI Breakdown, or Unassigned KPI. The name of the Scorecard is displayed near the icon.
	Represents the parent Perspective of the selected KPI, KPI Breakdown, or Unassigned KPI. The name of the Perspective is displayed near the icon.
	Represents one of the following: <ul style="list-style-type: none"> <li>The selected Objective. The name, score, trend, and status of the Objective is displayed near the icon.</li> <li>The parent Objective of the selected KPI, KPI Breakdown, or Unassigned KPI.</li> </ul>
	Represents the selected KPI, KPI Breakdown, or Unassigned KPI. The name, value, trend, and status of the KPI, KPI Breakdown, or Unassigned KPI is displayed near the icon.

## Toolbar

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

UI Element	Description
	<p><b>Send mail.</b> Opens an Outlook email, with the owner of the selected Objective, KPI, Metric listed in the <b>To</b> box, <b>Regarding:</b> &lt;Item_name&gt; in the <b>Subject</b> box, and enter the text you want in the body of the email.</p> 
	<p><b>Save snapshot.</b> Captures the current view in Explorer (all of it) in a new window. A dialog box opens to ask you where you want to save the image.</p>

UI Element	Description
	<p><b>Print.</b> Displays the Print dialog box where you can select the printer and how to print the content of the corresponding Explorer tab.</p> <p>The printout includes:</p> <ul style="list-style-type: none"><li>• The contents of the area that was selected while you clicked the button.</li><li>• The Annotations Area.</li></ul>
	<p><b>Show/Hide Annotations.</b> The button is enabled only for Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPI. It opens a box where you can add your annotation or hide them after viewing. For details, see <a href="#">"Annotations" on page 428</a>.</p> <p>Click the button again to close the Annotation area.</p> <div data-bbox="412 821 1370 1192" style="background-color: #f0f0f0; padding: 10px;"><p><b>Note:</b> The <b>Show/Hide Annotations</b> icon with a little + sign  in the bottom toolbar indicates that a new annotation was added to the selected item during the past week.</p><p>The number of days during which the annotations are considered to be new is a setting that is configurable by your administrator in <b>Admin &gt; Scorecard &gt; Dashboard Settings &gt; Number of days annotations are considered new</b>. For example, if the administrator gives the setting the value <b>14</b>, then the + sign will indicate that the annotation was added in the last 2 weeks. The default is a week.</p></div>



# Annotations


The Annotation area enables you to add annotations to the selected item (Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs).

**To access:**

In the **Explorer** tab, click **Show annotations**  to open the Annotation area.

**Section navigation:** • ["Learn More" below](#) • ["Tasks" below](#) • ["UI Description" on page 428](#)

## Learn More

- If you do not have permission to display the Explorer tab, then you cannot access it, even to look at the details for the Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs.
- Click X in the top right corner of the Explorer tab to access or return to the Dashboard.
- Click **Show annotations**  to open or close the Annotation area.



## Tasks



This section includes:

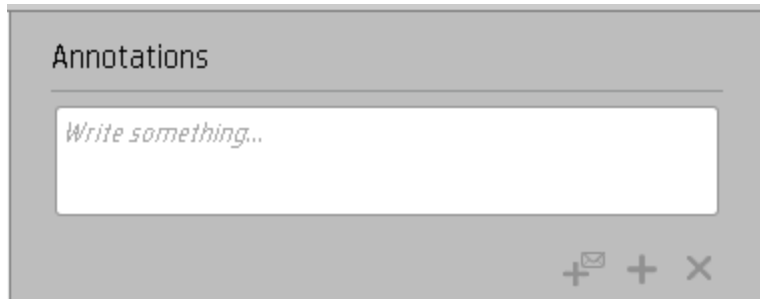
["Add annotations to a specific Objective, KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI " below](#)

["Send annotations by email" on the next page](#)

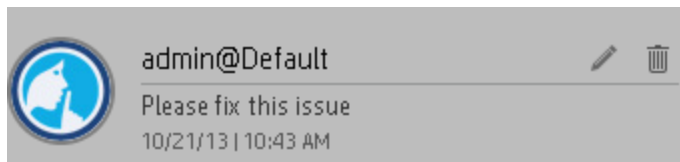
### **Add annotations to a specific Objective, KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI**

1. In the Explorer tab, click the relevant item in the Active KPIs tree.
2. Examine the information displayed in the Explorer Overview, Data Set and Goal Map areas.
3. If you have comments, click the **Show annotations**  button at the bottom of the Annotations area.
4. In the box that opens, enter your annotation, and click **Add** to add the annotation to the list of annotations in the Annotations area. You can also click  to add the annotation to the list of annotations in the Annotations area and to open an email.

If you want to add the details of the item in the Overview, Data Set, or Goal Map to the email, click , click , and then click `Control + V` in the body of the opened email.




5. The annotation is added to the list.



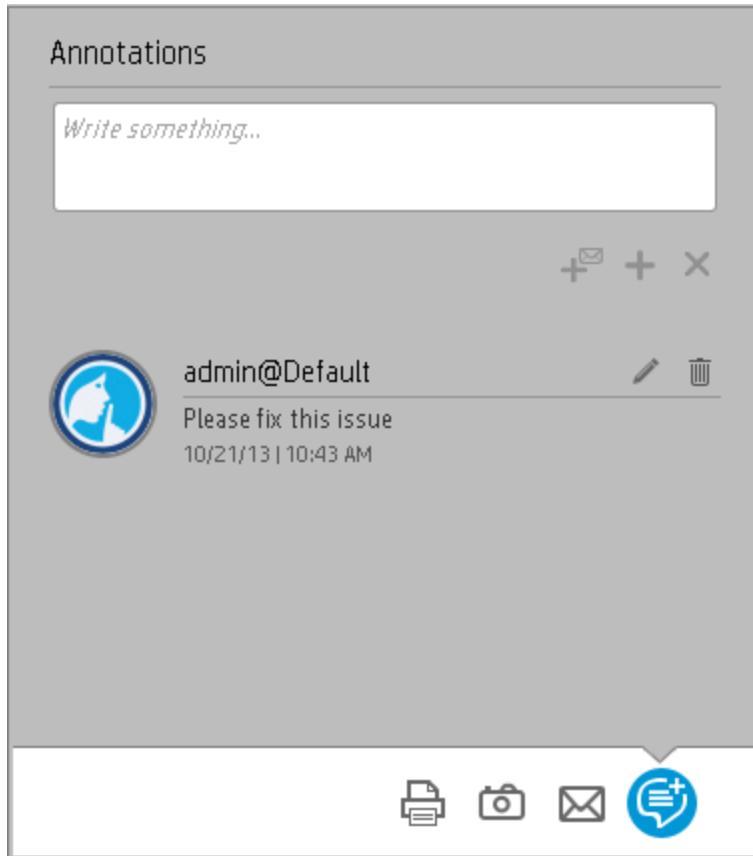
For additional details, see ["Annotations" on the previous page](#).

### **Send annotations by email**

1. In the Explorer tab, click the relevant item in the Active KPIs tree.
2. Write the annotation and click .







## UI Description

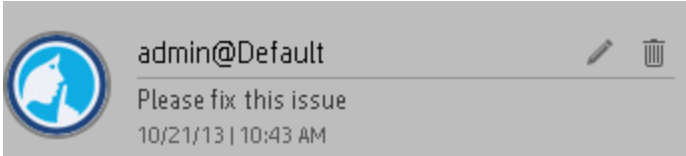



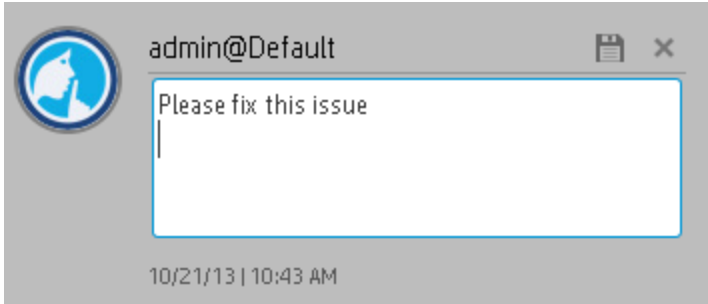

### Annotations



**Note:** This area is displayed only for Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs.


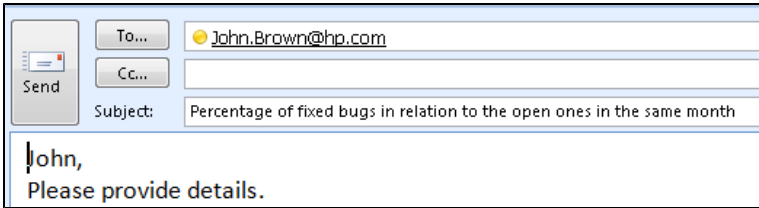
User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets>):





UI Element	Description
<Annotation box>	<p data-bbox="459 300 1391 373">Enter your annotation, and click <b>Add Annotation</b> to add the annotation to the list of annotations in the Annotation area.</p> <div data-bbox="464 394 1221 688"></div> <ul data-bbox="459 730 1391 1176" style="list-style-type: none"><li data-bbox="459 730 1391 840">• Click <b>Add and email annotation</b>  to add the annotation to the list of annotations in the Annotations area and to open an email with the content of the annotation.  If you want to add the details of the item in the Overview, Data Set, or Goal Map to the email, click , click , and then click <code>Control + V</code> in the body of the opened email.</li><li data-bbox="459 1008 1391 1081">• Click <b>Add new annotation</b>  to add the annotation to the list of annotations in the Annotations area.</li><li data-bbox="459 1102 1391 1176">• Click <b>Discard annotation</b>  to discard the annotation you are currently writing.</li></ul>

UI Element	Description
<Annotation Area>	<p>Lists the annotations sent for the selected Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs. The annotation includes the sender's name and image (if available), the date and time when the annotation was sent, and the contents of the annotation.</p>  <p>The sender can also:</p> <ul style="list-style-type: none"> <li>Click  to edit an annotation. An edit box opens around the text of the annotation. A <b>Save</b>  icon and <b>Cancel</b>  icon are displayed.</li> </ul>  <ul style="list-style-type: none"> <li>Click  to discard an annotation. A confirmation message is issued. Click <b>OK</b> to discard.</li> </ul>

## Toolbar

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

UI Element	Description
	<p><b>Send mail.</b> Opens an Outlook email, with the owner of the selected Objective, KPI, Metric listed in the <b>To</b> box, <b>Regarding:</b> &lt;Item_name&gt; in the <b>Subject</b> box, and enter the text you want in the body of the email.</p> 

UI Element	Description
	<p><b>Save snapshot.</b> Captures the current view in Explorer (all of it) in a new window. A dialog box opens to ask you where you want to save the image.</p>
	<p><b>Print.</b> Displays the Print dialog box where you can select the printer and how to print the content of the corresponding Explorer tab.</p> <p>The printout includes:</p> <ul style="list-style-type: none"><li>• The contents of the area that was selected while you clicked the button.</li><li>• The Annotations Area.</li></ul>
	<p><b>Show/Hide Annotations.</b> The button is enabled only for Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPI. It opens a box where you can add your annotation or hide them after viewing. For details, see <a href="#">"Annotations" on page 428</a>.</p> <p>Click the button again to close the Annotation area.</p> <div data-bbox="412 911 1370 1285" style="background-color: #f0f0f0; padding: 10px;"><p><b>Note:</b> The <b>Show/Hide Annotations</b> icon with a little + sign  in the bottom toolbar indicates that a new annotation was added to the selected item during the past week.</p><p>The number of days during which the annotations are considered to be new is a setting that is configurable by your administrator in <b>Admin &gt; Scorecard &gt; Dashboard Settings &gt; Number of days annotations are considered new</b>. For example, if the administrator gives the setting the value <b>14</b>, then the + sign will indicate that the annotation was added in the last 2 weeks. The default is a week.</p></div>

# 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 Business Analyst User Guide (IT Executive Scorecard 9.41)**

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.

