# **HP IT Executive Scorecard**

Software Version: 9.50 Windows ® operating system

## 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 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 12.
- 2. Make sure the HP IT Executive Scorecard settings are configured. For details, see Perform Administration Tasks for Foundation 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 24.
- 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 165.
- 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 190.
- 7. The Executive user can now view and analyze the relevant business objectives. For details, see "View and Analyze the Business Objectives" on page 452.
- 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:

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# 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.

## Semantic Layer - Contexts and Universes

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 Excel (or .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 contexts (universes). For details, see the relevant contexts 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
- 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
- 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*
- 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
- 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*
- Alternate Source Integration in the IT Executive Scorecard Content Reference Guide for the Integration of Alternate Data Sources

## The Scorecard KPI Engine

The Scorecard KPI engine works with KPIs and Objectives. For concept details about KPIs, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51. For concept details about Objectives, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51

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%.

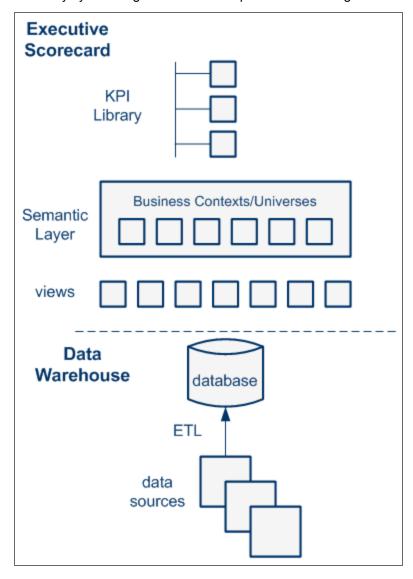
Scores can be calculated using one of the following rules:

- 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.



For details on the KPI Library, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.

For details on the Semantic Layer (Business Contexts or universes), see "KPI or a Metric Business Context" on page 146.

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

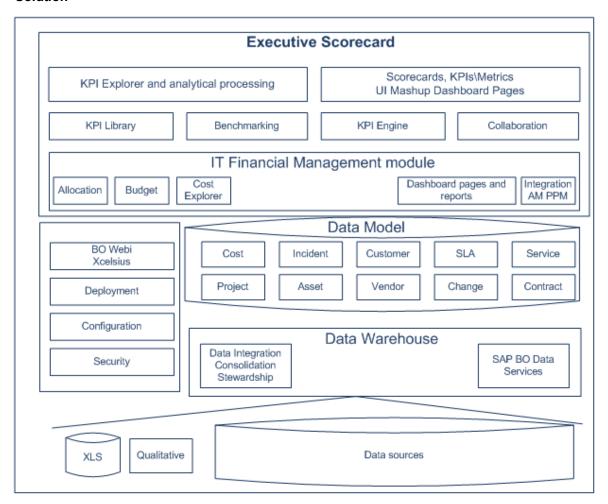
## The Executive Scorecard Solution

HP IT Executive Scorecard is a strategy enabler. It 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.

#### 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 Managementand 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: STUDIO, EXPLORER, FINANCE, and ADMIN tabs and the Dashboard. For details, see Executive Scorecard UI Modules in *Getting Started with IT Executive Scorecard*.

## 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.





### **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, Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs or Content Acceleration Pack (CAP) Management in the Content Acceleration Packs 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 33.

### **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 directory tree. A directory tree includes only directories, 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** directory 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.

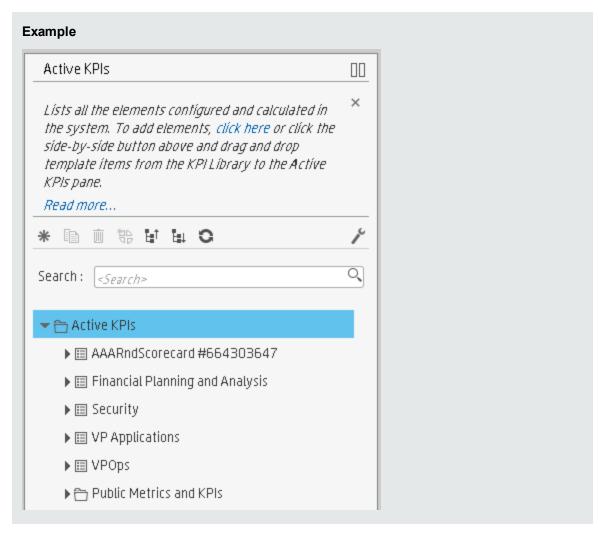
Active Scorecard, Perspective, Objectives, KPIs, and Metrics are the building blocks of the elements (components and pages) the Executive end-user views in the Dashboard.

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 63.

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.

### **About Trees**



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** directory.

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

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 63

Metrics are indicated by  $\begin{tabular}{|c|c|c|c|} \hline & & \\ \hline & & \\$ 

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

Each Metric can include Metric Breakdowns (indicated by D.). 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 166. **Example** Active KPIs × Lists all the elements configured and calculated in the system. To add elements, click here or click the side-by-side button above and drag and drop template items from the KPI Library to the Active KPIs pane. Read more ... \* • • • • • • Q Search: <Search> 🕶 🛅 Active KPIs III AAARndScorecard #664303647 Financial Planning and Analysis Financial View O Understand cost of assets by Months Actual Cost ⊕ Actual Cost by Location Name ▼ ⊕ Actual Cost by Program Name. 船 Actual Cost by Organizati.... 船 Actual Cost by Supplier N... 船 Actual Cost by CostCateg.... 船 Actual Cost by Service Na...

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 63.



### This task includes the following steps

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## 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 of if they should be customized.

For details, see "Executive Personas and their Business Challenges" on page 13.

## 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 51.

# 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 63.

# 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 76, "Perspective Configuration Details" on page 83, or "Objective Configuration Details" on page 87.

## 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 99.
- 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 63.
- Changing their Business Context of a KPI or a Metric. For details, see "KPI or a Metric Business Context" on page 146.
- Changing the formula used to calculate the KPI or a Metrics. For details, see "KPI or Metric Formula" on page 112.
- 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 136.
- Change the thresholds to recalculate the status of a KPI. For details, see "Calculation" on page 150 or "Recalculation" on page 153.

## 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 184.
- Creating breakdowns of KPIs to obtain more detailed information about the KPI's measurements. For details, see "KPI Breakdowns" on page 166.
- Managing overrides. For details, see "KPI and Metric Breakdown Overrides" on page 176.

 Adding additional information to the Metric, KPI or Objective. For details, see "KPI or Objective Additional Information" on page 181.

# © 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 150.
- 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 153.

You can schedule the calculation of specific business context automatically. For details, see "Calculation Scheduling" on page 156.

## 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 453.

## 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 190.

## **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. For details, see "Templates" above.

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 Migrate Trees, Metrics, and Unassigned KPIs 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 16.

### 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.
- 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.





### **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?	For details about Perspectives, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.
		A Scorecard can include one or more Perspectives.
		Example Operational excellence.
Objective	What is the objective trying to achieve?	For details about Objectives, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.
		A Perspective can include one or more Objectives.
		<b>Example</b> Increase responsiveness in IT to service requests for PC orders by 20% in 2010.
КРІ	How will performance be measured?	For details about KPIs, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.
		An Objective can include more than one KPI.
		<b>Example</b> Time to order, configure, and install PC.
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 51.

Active Scorecards, Perspectives, Objectives, and KPIs display real data in the Dashboard. For details, see "Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" on page 63.

### **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.

### **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."

**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.

**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 "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.

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 51.

A complete list of KPIs and Metrics is available in KPI Library in Excel format.

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

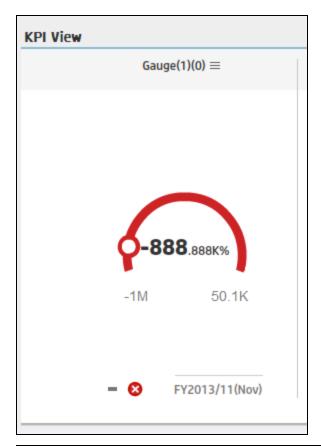
This section describes the information related to a KPI or Metric:

### 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.

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 9999999 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 "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.

**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).

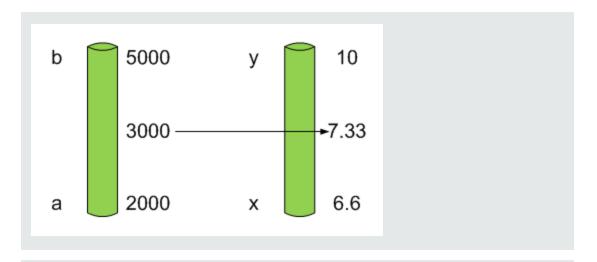
The Score calculation process is as follows:

- 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.

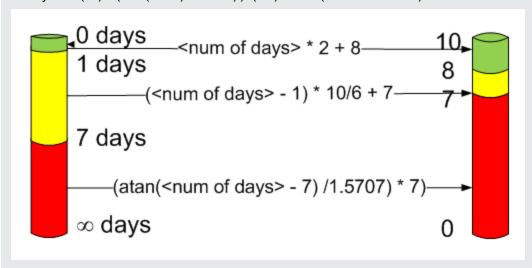
Any value on the MTTR scale needs to be transformed into the score scale by linear or exponential transform. Since the lower threshold is not set (it is equal to  $\infty$ ), the formula is different:

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

10 days  $\rightarrow$  F(10) = (atan(10 - 7) / 1.5707))\* (7-0) = 4.43 (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.



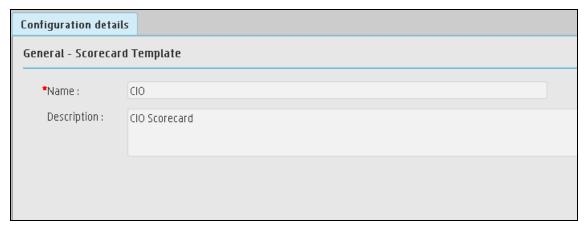
## View the template definitions

- 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.



#### **Configuration Details Tab for a Scorecard Template**

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

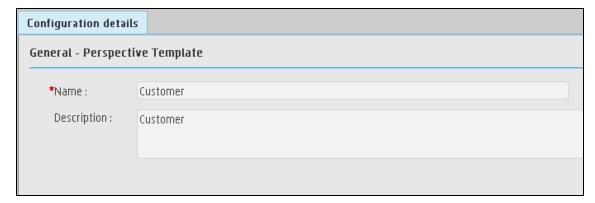


#### **General - Scorecard Template**

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

### **Configuration Details Tab for a Perspective Template**

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



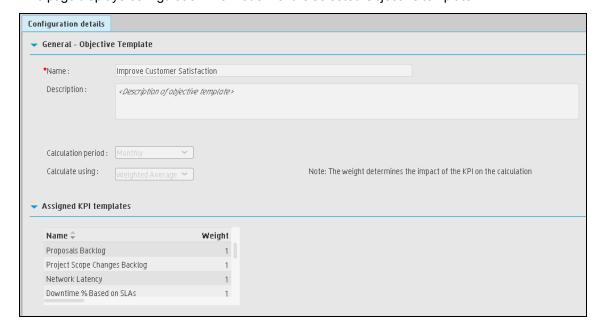
#### **General - Perspective Template**

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

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

#### **Configuration Details Tab for an Objective Template**

This page displays configuration information for the selected Objective template.



#### **General - Objective Template**

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

UI Element	Description
Name	The name of the Objective template. <b>Limitations:</b> The maximum number of characters is 240.
Description	The description of the Objective template.  Limitations: The maximum number of characters is 1000.
Id	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 Admin > Scorecard > XS Settings, and in Debug Mode, select the Application Debug Mode setting.
Туре	The type of the Objective. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click Admin > Scorecard > XS Settings, and in Debug Mode, select the Application Debug Mode setting.
Calculation Period	The calculation period of the Objective template.
Calculate Using	<ul> <li>The type of rule to use to calculate the Objective's score according to the scores of its children.</li> <li>You can select:</li> <li>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.</li> <li>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.</li> <li>Weighted average. 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>
	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.

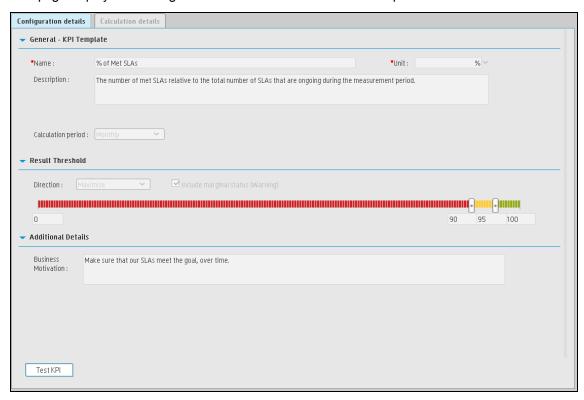
#### **Assigned KPI Templates**

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

UI Element	Description
<table></table>	The table lists:
	<ul> <li>Name. The KPI templates assigned to the Objective template.</li> <li>Weight. 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.



#### **General KPIs**

UI Element	Description
Name	The name of the KPI template. <b>Limitations:</b> The maximum number of characters is 240.
Unit	The unit of the KPI's value.
Description	The description of the KPI template. <b>Limitations:</b> The maximum number of characters is 1000.
Calculation	The time period used to calculate the value of the KPI (using the formula specified in

UI Element	Description
Period	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 Admin > Scorecard > XS Settings, and in Debug Mode, select the Application Debug Mode setting.
Туре	The type of the KPI. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click Admin > Scorecard > XS Settings, and in Debug Mode, select the Application Debug Mode setting.

#### **Result Threshold**

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

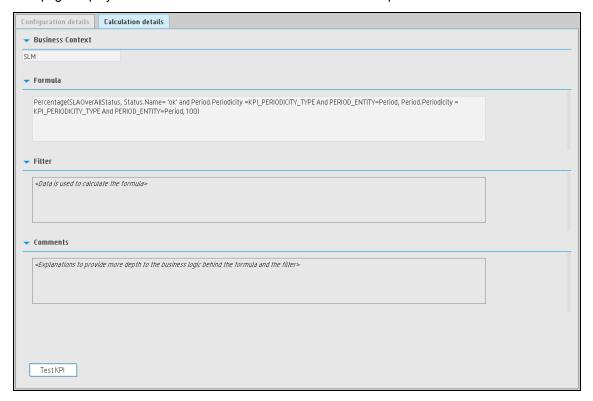
UI Element	Description
Direction	<ul> <li>Centralize. When the status of the KPI is best when it has either a specific value or its value is in a specific range, and higher or lower values are worse.</li> <li>Minimize. When the status of the KPI is best when it is low.</li> <li>Maximize. When the status of the KPI is best when it is high.</li> </ul>
Threshold	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 "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51. 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.
Include marginal status (Warning)	This option is selected when the status of the KPI is either <b>Good</b> , <b>Warning</b> , or <b>Critical</b> .  This option is not selected when the status of the KPI is only <b>Good</b> , or <b>Critical</b> .

#### **Additional Details**

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
<business context=""></business>	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
KPI Formula	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):

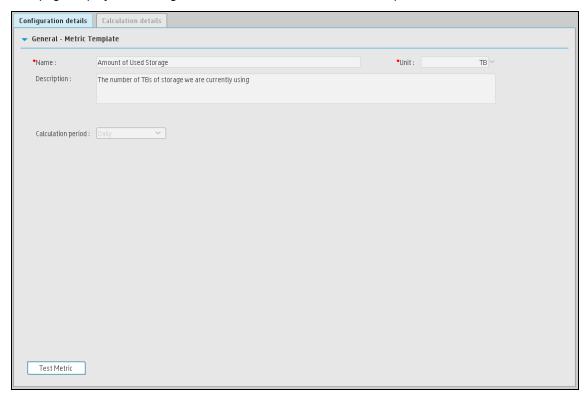
UI Element	Description
Filter	The filter that limits the range of data on which the KPI is to be calculated.

#### 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.



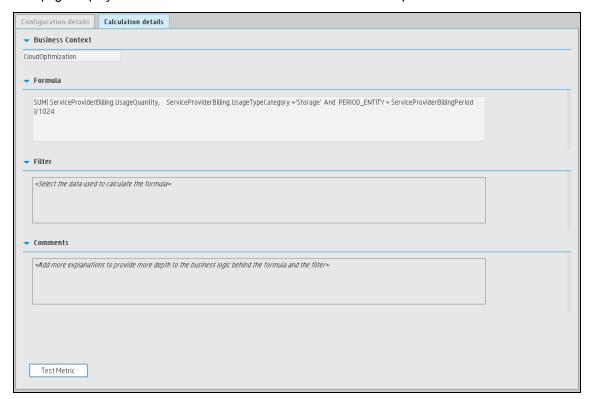
#### **General - Metric Template**

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

UI Element	Description		
	Limitations: 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 Admin > Scorecard > XS Settings, and in Debug Mode, select the Application Debug Mode setting.		
Туре	The type of the KPI. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click Admin > Scorecard > XS Settings, and in Debug Mode, select the Application Debug Mode setting.		

#### **Calculation Tab for a Metric Template**

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



#### **Business Context**

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

UI Element	Description
<business context=""></business>	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=""></metric>	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):

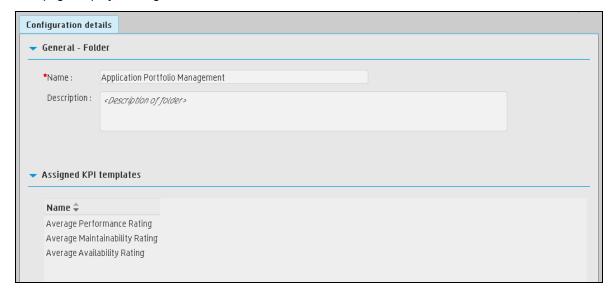
UI Element	Description	
Filter	The filter that limits the range of data on which the Metric is to be calculated.	

#### 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.



#### General - Folder

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

UI Element	Description		
Name	The name of the Folder.		
	<b>Limitations:</b> The maximum number of characters is 240.		
Description	The description of the Folder.		
	<b>Limitations:</b> The maximum number of characters is 1000.		
ld	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.		
Туре	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.

UI Element	Description
Name	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).





#### **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?	For details about Perspectives, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" above.  A Scorecard can include one or more Perspectives.  Example Operational excellence.
Objective	What is the objective trying to achieve?	For details about Objectives, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" above.

Scorecard Element	Key Performance Question	More Information and Example
		A Perspective can include one or more Objectives.
		<b>Example</b> Increase responsiveness in IT to service requests for PC orders by 20% in 2010.
KPI	How will performance be measured?	For details about KPIs, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on the previous page.
		An Objective can include more than one KPI.
		Example Time to order, configure, and install PC.
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 the previous page.

Active Scorecards, Perspectives, Objectives, and KPIs display real data in the Dashboard. For details, see "Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" on page 63.

#### **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.

#### **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."

**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.

**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 "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.

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 51.

A complete list of KPIs and Metrics is available in KPI Library in Excel format.

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

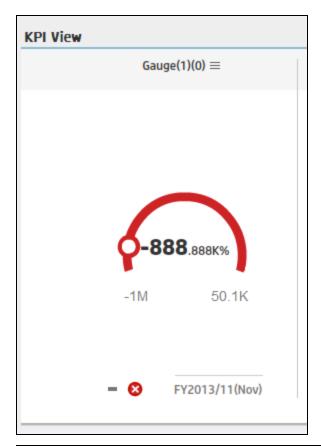
This section describes the information related to a KPI or Metric:

#### 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.

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 9999999 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 "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.

**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).

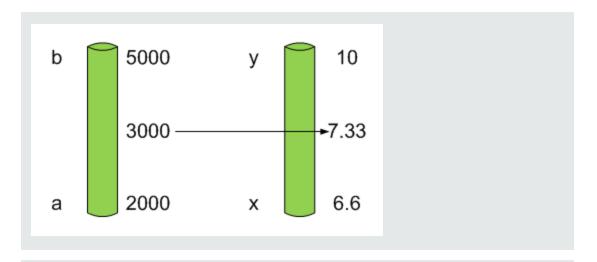
The Score calculation process is as follows:

- 1. Get the KPI result.
- 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.

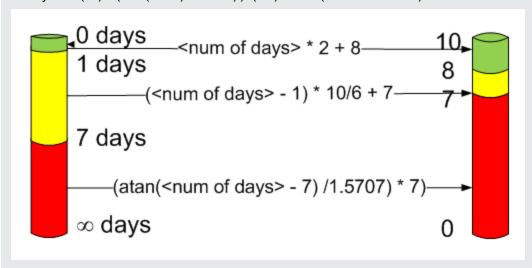
Any value on the MTTR scale needs to be transformed into the score scale by linear or exponential transform. Since the lower threshold is not set (it is equal to  $\infty$ ), the formula is different:

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

10 days  $\rightarrow$  F(10) = (atan(10 - 7) / 1.5707))\* (7-0) = 4.43 (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.



#### This section includes:

•	Activate a node by dragging the relevant template from the KPI Library to the Active KPI pane	58
•	Activate a Metric or KPI	58
•	Activate a Folder KPI	59

# 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 63.

## 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** directory.

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** directory. You can also move it directly to the **Public Metrics and KPIs** directory.

## 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:

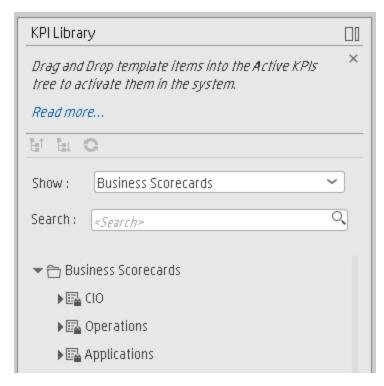
- 1. Click the **Studio** button (top right corner) to open the Studio.
- 2. You must work with the KPI Library pane and the Active KPIs pane side-by-side, so if necessary, click the **Toggle side-by-side view** button to display the **KPI Library** pane and the **Active KPIs** pane side by side.
- Select 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 63.



#### **KPI Library Pane**

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

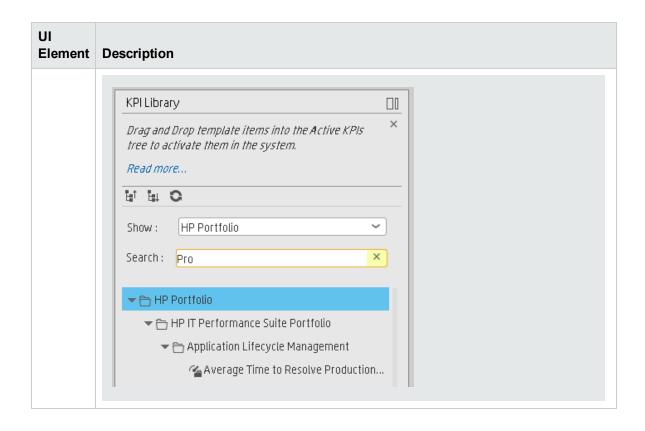


When you select an element in the KPI Library pane, the rightmost pane in the Studio displays the configuration of the selected element.

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

UI Element	Description
Show trees side-by-side. If the KPI Library pane or the Active KPIs pane is the button to open the closed pane (or click the vertical KPI Library or Abuttons). The pane is then displayed side-by-side with the other pane and with Configuration/Calculation details tabs.	
	<ul> <li>If the KPI Library pane and the Active KPIs pane are both open, click:</li> <li>The Collapse the Active KPIs button to hide the Active KPIs pane.</li> <li>The Collapse the KPI Library button to hide the KPI Library.</li> </ul>
0	<b>Refresh the tree.</b> Click to refresh the display of the tree. For details, see "Templates" on page 33.
En† Est	Collapse and expands the tree nodes.

UI Element	Description		
<tree></tree>	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 the Learn More section in "Templates" on page 33.		
Show	Displays the current template tree.		
	<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.		
Search	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.		
	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.		
	If more than one element includes the specified string, the paths to these elements are also displayed.		
	Example If the tree is as follows:		
	KPI Library		
	Drag and Drop template items into the Active KPIs tree to activate them in the system.		
	Read more		
	H H O		
	Show: HP Portfolio		
	Search: <search></search>		
	▼   HP Portfolio		
	▶ 亩 HP IT Performance Suite Portfolio		
	▶ 🛅 IaaS Resource Providers		
	After searching for the string: <b>pro</b> , the resulting tree is as follows:		



# 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.





#### **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?	For details about Perspectives, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.  A Scorecard can include one or more Perspectives.
		Example Operational excellence.
Objective	What is the objective trying to achieve?	For details about Objectives, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.
		A Perspective can include one or more Objectives.

Scorecard Element	Key Performance Question	More Information and Example
		<b>Example</b> Increase responsiveness in IT to service requests for PC orders by 20% in 2010.
KPI	How will performance be measured?	For details about KPIs, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.  An Objective can include more than one KPI.
		<b>Example</b> Time to order, configure, and install PC.
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 51.

Active Scorecards, Perspectives, Objectives, and KPIs display real data in the Dashboard. For details, see "Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" on the previous page.

#### **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.

#### 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 76.
- For a Perspective, see the UI Description section in "Perspective Configuration Details" on page 83.
- For an Objective, see the UI Description section in "Objective Configuration Details" on page 87.
- For a KPI, see the UI Description section in "KPI or Metric Configuration and Calculation Details" on page 99.

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



#### This section includes:

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## 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 76.
  - 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 83.
  - 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 87.

**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 KPIoption 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 99.
  - Select the Public Metrics and KPIs directory, 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 directory. 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 99. 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 directory 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 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**.
- 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.
- Once the Metric you created is ready to be calculated, launch the Engine by clicking Calculate
  now. For more details, see Calculation in the IT Executive Scorecard Business Analyst Guide.
  The engine will calculate the new Metric result and you will be able to view it in the Dashboard.

**Movie:** To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see Access Movies in the *Getting Started with IT Executive Scorecard*.

## 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 directory. 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 99.

## 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.

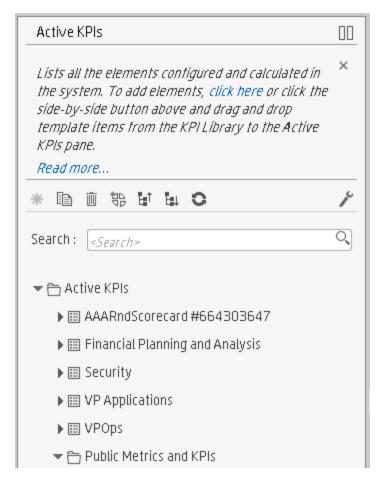
## Use Case - Build a Scorecard Tree and Create a New KPI

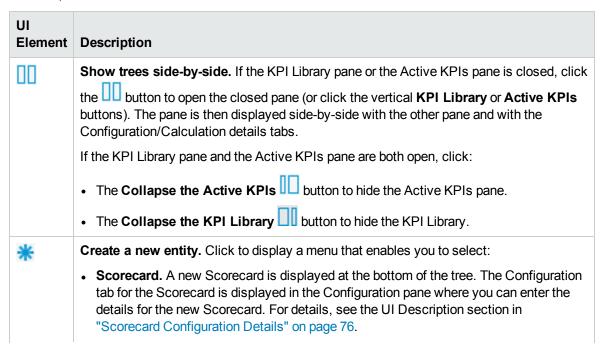
For details, see Use Case - Build a Scorecard Tree and Create a New KP in the *Getting Started with IT Executive Scorecard*.



#### **Active KPIs Pane**

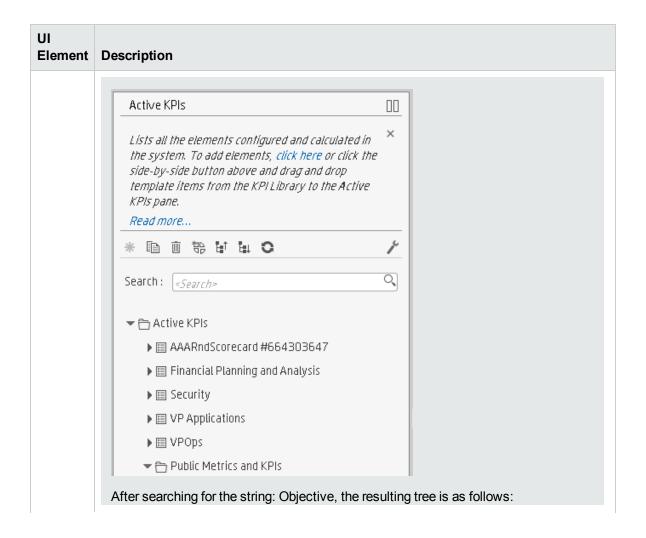
This pane displays the tree of active Scorecards, Perspectives, Objectives, Metrics, and KPIs, as well as the **Public Metrics and KPIs** directory that includes Unassigned KPIs and Metrics.





UI Element	Description
	<ul> <li>Perspective. 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 "Perspective Configuration Details" on page 83.</li> </ul>
	Objective. 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 "Objective Configuration Details" on page 87.
	• <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 "KPI or Metric Configuration and Calculation Details" on page 99.
	<ul> <li>Metric. 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 "KPI or Metric Configuration and Calculation Details" on page 99.</li> </ul>
	Create a copy of the current entity. 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)).
Ū	<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.
**************************************	Create KPI or Metric Breakdown. The list of available entities for the KPI or Metric is displayed.
	To create a KPI Breakdown or Metric you can do one of the following:
	Right-click the relevant KPI, Metric, KPI Breakdown, or Metric Breakdown, select     Breakdown and then select the entity and dimension in the list that opens.
	<ul> <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>
	To understand KPI/Metric Breakdowns, see "KPI Breakdowns" on page 166 or "Metric Breakdowns" on page 172.
J.	Calculation options. Displays the calculation options:
	Calculate now. 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 "Calculation" on page 150.

## UI Element **Description** Recalculate Recalculate. 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 "Recalculation" on page 153. Schedule Context Calculation Schedule context calculation. Opens the Business Context Calculation Scheduling dialog box where you can schedule the context calculation. For details, see "Calculation Scheduling" on page 156. J<sub>h</sub>\_ Calculation monitoring **Calculation monitoring.** 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 "Calculation and Recalculation Monitoring" on page 159. Collapses and expands the tree nodes. Ħ₫ **Refresh the tree.** Click to refresh the display of the tree. Search 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. 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. If more than one element includes the specified string, the paths to these elements are also displayed. Example If the tree is as follows:



## UI **Element Description** Active KPIs Lists all the elements configured and calculated in the system. To add elements, click here or click the side-by-side button above and drag and drop template items from the KPI Library to the Active KPIs pane. Read more ... \* 🗈 🗓 📅 🖬 🔾 Search: Objective × 🕶 🖰 Active KPIs ▼ III AAARndScorecard #151948722 ▼ ☐ RndPerspective #1068044054 RndObjective #1177315671 RndObjective #405993160 Public Metrics and KPIs

<tree>

The pane displays the active tree with the relevant Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, and in the **Public Metrics and KPIs** directory, standalone KPIs, and Metrics.

- 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.
- 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.
- You cannot drag a KPI Breakdown from one KPI to another.
- You cannot drag a Metric Breakdown from one Metric to another.
- 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.
- When you are performing a drag and drop operations:
  - The icon indicates that the drop is not allowed.
  - Average Time to Resolve Producti... icon indicates that the drop is allowed.

UI Element	Description
	Note about the Public Metrics and KPIs directory: The KPIs and Metrics under this directory 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.

# 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.

Learn More Tasks UI Description



### **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?	For details about Perspectives, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.  A Scorecard can include one or more Perspectives.
		Example Operational excellence.
Objective	What is the objective trying to achieve?	For details about Objectives, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.
		A Perspective can include one or more Objectives.

Scorecard Element	Key Performance Question	More Information and Example
		<b>Example</b> Increase responsiveness in IT to service requests for PC orders by 20% in 2010.
КРІ	How will performance be measured?	For details about KPIs, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.  An Objective can include more than one KPI.
		<b>Example</b> Time to order, configure, and install PC.
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 51.

Active Scorecards, Perspectives, Objectives, and KPIs display real data in the Dashboard. For details, see "Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" 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 164.

### **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 customers 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?



### This section includes:

•	Customize the Node	3.	30
•	Populate the Node	. 8	30

### Customize the Node

### To customize the node:

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

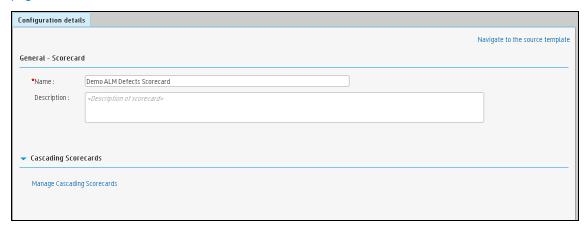
- 1. Click the **Studio** button (top right corner) to open the Studio.
- 2. In the **Active KPIs** pane, select the relevant node. Its details are displayed in the Configuration Details pane.
- 3. You can also populate the node by adding or removing the following nodes:
  - a. Perspectives. For details, see "Perspective Configuration Details" on page 83.
  - b. Objectives. For details, see "Objective Configuration Details" on page 87.
  - c. KPIs. For details, see "KPI or Metric Configuration and Calculation Details" on page 99.
  - d. KPI Breakdowns. For details, see "KPI Breakdowns" on page 166.



### Configuration Details Tab for a Scorecard

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

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 164.



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

UI Element	Description
Navigate to the source template	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.
Save	Click to save the changes.
Discard	Click to discard the changes you have made since the last Save operation.
Help S ×	Click the refresh button, in the top right corner, to refresh the display.

### General - Scorecard

UI Element	Description
Name	The name of the active Scorecard.  Limitations:  The characters: \ / : * ? " < >   are not supported.  The maximum number of characters is 240.
Description	The description of the Scorecard. <b>Limitations:</b> The maximum number of characters is 1000.
ld	The Id of the Scorecard. It is automatically assigned.

UI Element	Description
	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.
Туре	The type of Scorecard. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click Admin > Scorecard > XS Settings, and in Debug Mode, select the Application Debug Mode setting.

### **Cascading Scorecards**

UI Element	Description
Manage Cascading Scorecards	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 "Cascading Scorecards" on page 184.
Name	The name of the Cascading Scorecard.
Remove	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.





### **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 164.



### This section includes:

•	Customize the Node	8
•	Populate the Node	. 8
•	Configuration Details Tab for a Perspective	. 8

### 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.

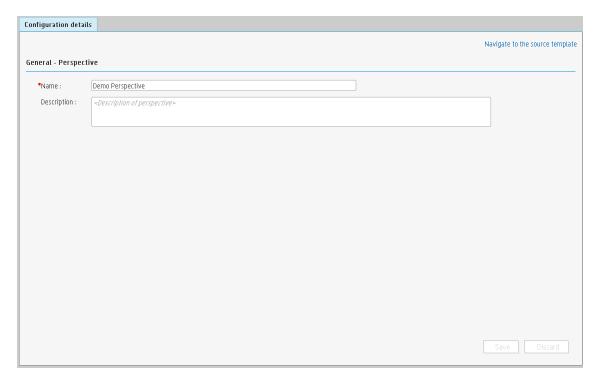
## Populate the Node

- 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 87.
  - b. KPIs. For details, see "KPI or Metric Configuration and Calculation Details" on page 99.
  - c. KPI Breakdowns. For details, see "KPI Breakdowns" on page 166.



## 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
Navigate to the source template	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.
Save	Click to save the changes.
Discard	Click to discard the changes you have made since the last Save operation.
Help ♥ ×	Click to refresh the display.

### **General - Perspective**

UI Element	Description
Name	The name of the active Perspective.  Limitations:
	<ul> <li>The characters: \ / : * ? " &lt; &gt;   are not supported.</li> <li>The maximum number of characters is 240.</li> </ul>
Description	The description of the Perspective.

UI Element	Description
	Limitations: The maximum number of characters is 1000.
ld	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.
Туре	The type of Perspective. It is automatically assigned.  This information is displayed only when in debug mode. To set the debug mode, click  Admin > Scorecard > XS Settings, and in Debug Mode, select the Application  Debug Mode 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.

Learn More Tasks UI Description



### **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 164.



### This section includes:

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Unassign a KPI from an Objective	80

### 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 99.
     You might consider sharing KPIs between Objectives. For details, see "Objective's KPIs" on

### page 94.

b. KPI Breakdowns. For details, see "KPI Breakdowns" on page 166.

# Use Case - Configure the calculation rule for an Objective

- 1. Click the **Studio** button (top right corner) to open the Studio.
- 2. In the Active KPIs pane, select the Objective whose calculation rule you want to configure.
- 3. In the right pane, in the **Configuration Details** tab in the **Calculate using** field, select one of the available calculation rules:
  - BEST\_CHILD if you want to base the Objective calculation of the child KPI with the best score.
  - WORST\_CHILD if you want to base the Objective calculation of the child KPI with the worst score.
  - WEIGHTED\_AVERAGE if you want to base the Objective calculation of the average of the child KPI's scores.
- 4. You can specify the weights of specific KPIs to increase their influence on the calculation.
- 5. Click **Save** to save your configuration and to perform the calculation of the Objective to reflect its changes in the Dashboard.

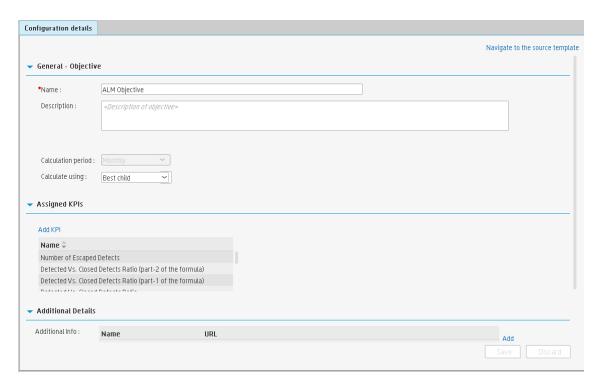
**Movie:** To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see Access Movies.

## 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.
- To save the changes you must save the Objective by clicking Save.



Configuration Details Tab for an Objective



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

UI Element	Description
Navigate to the source template	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.
Save	Click to save the changes.
Discard	Click to discard the changes you have made since the last Save operation.
Help ♡ ×	Click to refresh the display.

### **General - Objective**

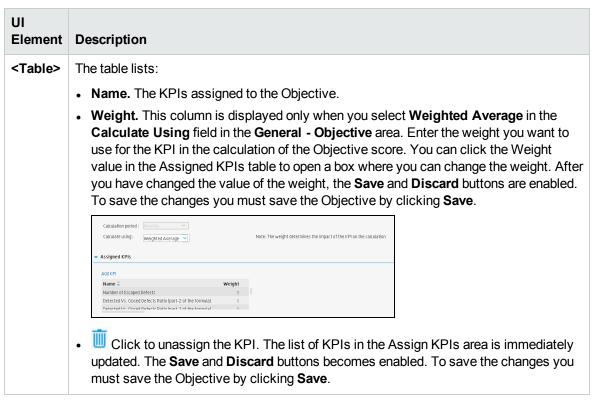
UI Element	Description
Name	The name of the active Objective.  Limitations:
	<ul> <li>The characters: \/:*?" &lt; &gt;   are not supported.</li> <li>The maximum number of characters is 240.</li> </ul>
Description	The description of the Objective.

UI Element	Description
	Limitations: The maximum number of characters is 1000.
ld	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.
Туре	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.
Calculation	The calculation period of the Objective.
Period	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.
Calculate Using	The type of rule to use to calculate the Objective's score according to the scores of its children. You can select:
	• 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 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 (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.

### **Assigned KPIs**

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

UI Element	Description
Add KPI	Click to open the Assign KPI to Objective dialog box where you can assign the relevant KPIs to the current Objective. For details, see "Objective's KPIs" on page 94.



### **Additional Details**

UI Element	Description
Additional Info	Lists the additional information available for the Objective. It can be links to BO or Xcelcius reports, external links, or links to Dashboard pages.  Additional Details  Additional Details  Additional Details  Additional Information available for the Objective. It can be links to BO or Xcelcius reports, external links, or links to Dashboard pages.  The table includes:  Name. The name of the link, the Dashboard page, the reports, or the name of the URL.  URL. 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 "KPI or Objective Additional Information" on page 181.  Click to delete the selected additional information.
Owner	The owner of the active Objective.

UI Element	Description
	The list of available owners corresponds to the users that were defined in <b>Admin</b> > <b>Users and Roles</b> > <b>User Management</b> . For details, see User Management in the <i>IT Executive Scorecard Administrator Guide</i> .
Add Info	Click to open the <b>Add Info Link</b> dialog box where you can add additional information for the Objective. For details, see "KPI or Objective Additional Information" on page 181.

# 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.





### **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.

For details about KPIs and Objectives, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51

# 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 164.

#### Shared KPIs

When you create a KPI, the KPI is displayed in the **Public Metrics and KPIs** directory in the Active KPIs pane.

When you assign that KPI to an Objective, the KPI is removed from the **Public Metrics and KPIs** directory in the Active KPIs pane.

You can assign the same KPI to another Objective, instead of cloning it. Such a KPI becomes a shared KPI.

Using shared KPIs instead of cloning them also provides better performance as a shared KPI is calculated once for all the Objectives to which it is assigned. It is also easier to update to the next version as you update the shared KPI once instead of updating each clone of the KPI.

Note that you cannot use shared KPIs for Scorecards that are created by users with different GEN\_ <Scorecard name> roles. For details, see Role Management in the *IT Executive Scorecard Administrator Guide*.



### This section includes:

•	Assign a KPI to an Objective	.95
•	Unassign a KPI from an Objective	.96

## 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.
- In the Assign KPI to Objective dialog box, move the relevant KPI from the Available KPIs area to the Assigned KPIs area.

You might consider sharing KPIs between Objectives. For details, see "Objective's KPIs" on the previous page.

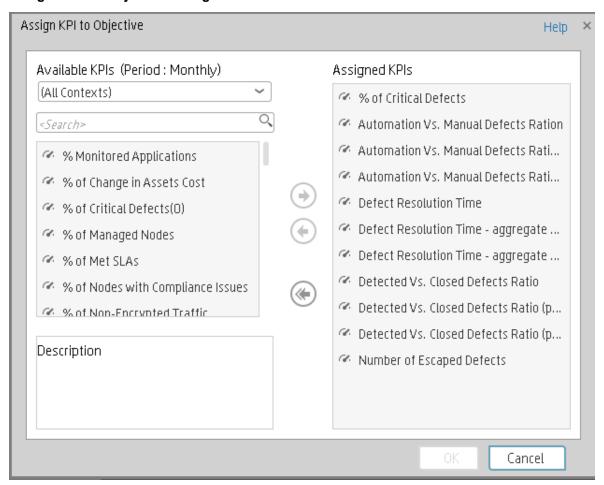
- 4. Click **OK**. The **Assign KPI to Objective** dialog box closes.
- 5. The KPI immediately appears in the Assigned KPIs list in the Configuration Details tab. The **Save** and **Discard** buttons are enabled. To save the changes click **Save**
- 6. The tree in the Active KPIs pane is refreshed and 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.



### Assign KPIs to Objective Dialog Box



UI Element	Description
Available KPIs	<ul> <li>Lists the KPIs available to be assigned to the Objective.</li> <li>You can:</li> <li>Select the relevant context in the <aii contexts=""> 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).</aii></li> <li>Enter a string in the <search> box to filter for the KPIs whose name includes the string.</search></li> </ul>
Assigned KPIs	Lists the KPIs that you want to assign to the Objective.
Description	The description of the KPI selected in the Available KPIs area.
(*) (*)	Select the relevant KPI and move it to the relevant field using the buttons.
OK	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> .

## 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
  move to the Public Metrics and KPIs directory 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 63.

To learn about Shared KPIs, see "Objective's KPIs" on page 94.

### 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.





### **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."

**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.

**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 "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.

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 51.

A complete list of KPIs and Metrics is available in KPI Library in Excel format.

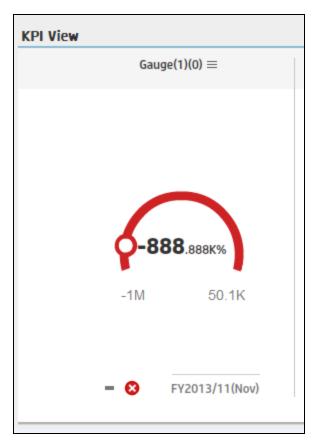
# Impact of changes to configurations in the Studio on the display in Dashboard and the EXPLORER tab

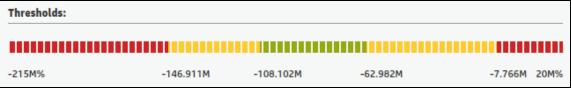
Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see "Synchronization of Changes in the Studio with Display in the Dashboard and the EXPLORER tab" on page 164.

### **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 9999999 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:





### This section includes:

Use Case - Display and modify a KPI or a Metric properties
 Use Case - Create a New Metric
 102

# Use Case - Display and modify a KPI or a Metric properties

In this section, you will learn how to modify a KPI configuration. Click the Studio to open the Studio.

- 1. Click the **Studio** button (top right corner) to open the Studio.
- In the Active KPIs pane, select the KPI you'd like to modify.
- 3. In the Configuration Details pane:
  - a. In the **General KPI** area, you can change the KPI name, you can select a different unit or enter a custom unit. You can change the Calculation period.
  - b. In the **Result Threshold** area, you can change the threshold direction, include the marginal status, and set the threshold boundaries by dragging the handles.
  - c. In the Additional Details area, you can add to the KPI, additional information that will be shown in the Dashboard and the Explorer tab. In the Business Motivation enter the relevant motivation.
  - d. In the **Additional Info** area, you can add information that will be displayed with the KPI. It can be a URL, a Dashboard page, or a report.
    - You can also set an owner for the KPI. The owner will receive the annotations set for the KPI in the Dashboard page or in the Explorer tab.
  - e. Save your changes.
- 4. In the right pane, click the Calculation Details tab.
  - a. Click Open Formula Builder to modify the KPI formula.
     How to modify the formula is detailed in another section.
  - b. Click Open Formula Filter to modify the KPI filter.
  - c. In the Comments field, add any additional information.
- 5. Remove the current formula and start creating your own formula.
- 6. Click Save to save your changes.
- 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.

**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 in the *Getting Started with IT Executive Scorecard*.

## Use Case - Create a New Metric

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

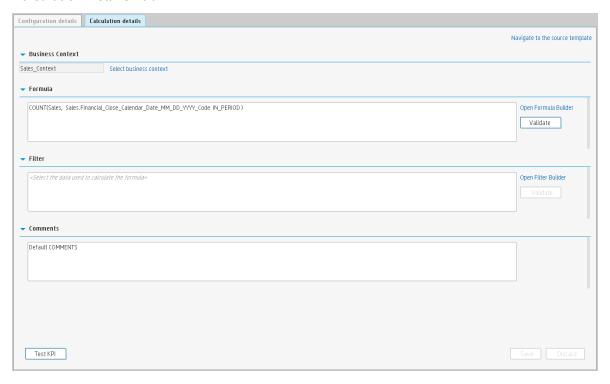
- 1. Click the **Studio** button (top right corner) to open the Studio.
- 2. In the Active KPIs pane, select the Public Metrics and KPIs directory and click the Create a new entity icon and select Metric.

- 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 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**.
- 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.
- Once the Metric you created is ready to be calculated, launch the Engine by clicking Calculate
  now. For more details, see Calculation in the IT Executive Scorecard Business Analyst Guide.
  The engine will calculate the new Metric result and you will be able to view it in the Dashboard.

**Movie:** To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see Access Movies in the *Getting Started with IT Executive Scorecard*.



### **Calculation Details Tab**



### **General Information**

UI Element	Description
Navigate to the source template	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.
Test KPI	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.
	Studio
	KPI Name: KPI for Annotation Test KPI Value: O Sales Score: O Status: S
	The button is disabled for KPI Breakdowns.
Save	Click to save the changes.
Discard	Click to discard the changes you have made since the last Save operation.
Help S ×	Click to refresh the display.

### **Business Context**

UI Element	Description
<business context=""></business>	The box displays the Context you selected.  You can use additional variables and entities by creating Contexts using Context Designer. For details, see Semantic Layer - Context Designer in the IT Executive Scorecard Administrator Guide.
	<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.
Select business	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

UI Element	Description
context	calculation of the KPI value and defines the entities used in the formula. For details, see SAP BusinessObjects Enterprise Contexts (Universes) in the <i>IT Executive Scorecard Content Reference Guide</i> .
	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.

### **Formula**

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

UI Element	Description
KPI Formula	The formula used to calculate the value of the KPI.
Validate	Click to validate the formula that appears in the Formula box.
Open Formula Builder	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 "KPI or Metric Formula" on page 112

### **Filter**

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

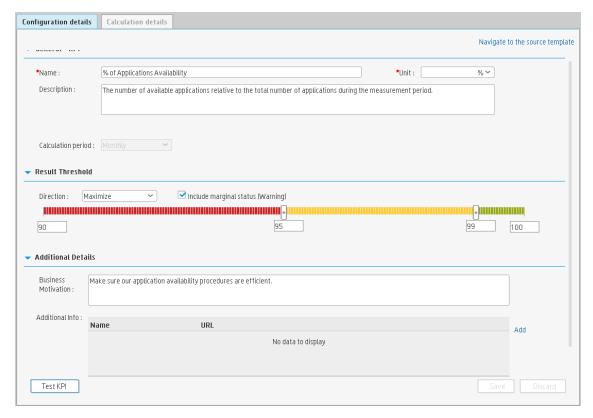
User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets):

UI Element	Description
Filter	Specify the filter to limit the range of data you want the KPI to be calculated on.
Validate	Click to validate the filter.
Open Filter Builder	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 "KPI or Metric Filter" on page 136

### Comments

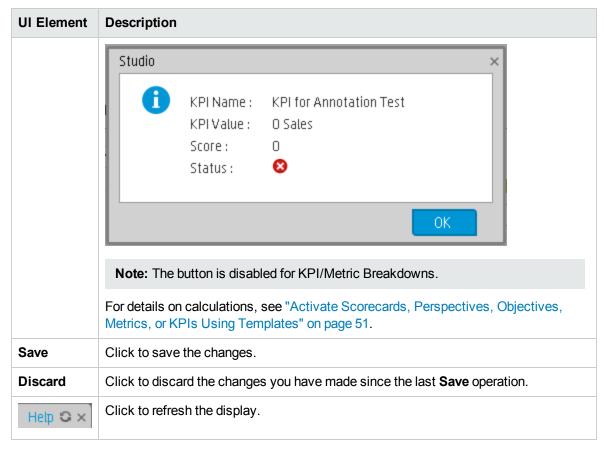
Use the Comments area to enter a description of the formula and its purpose in your own words.

### **Configuration Details Tab**



### **General Information**

UI Element	Description
Navigate to the source template	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.
Test KPI/Metric	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.



### General - KPI/Metric

Description
The name of the KPI/Metric or of the KPI/Metric template.
Limitations:
• The characters: \ / : * ? " < >   are not supported.
The maximum number of characters is 240.
Tip:
<ul> <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 "KPI and Metric Breakdown Overrides" on page 176.</li> </ul>
<ul> <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>

UI Element	Description
Unit	The unit of the KPI/Metric value.
Description	The description of the KPI/Metric. <b>Limitations:</b> The maximum number of characters is 1000.
Calculation Period	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> .
	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> .
ld	The ID of the KPI/Metric. 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.
Туре	The type of the KPI/Metric. 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.

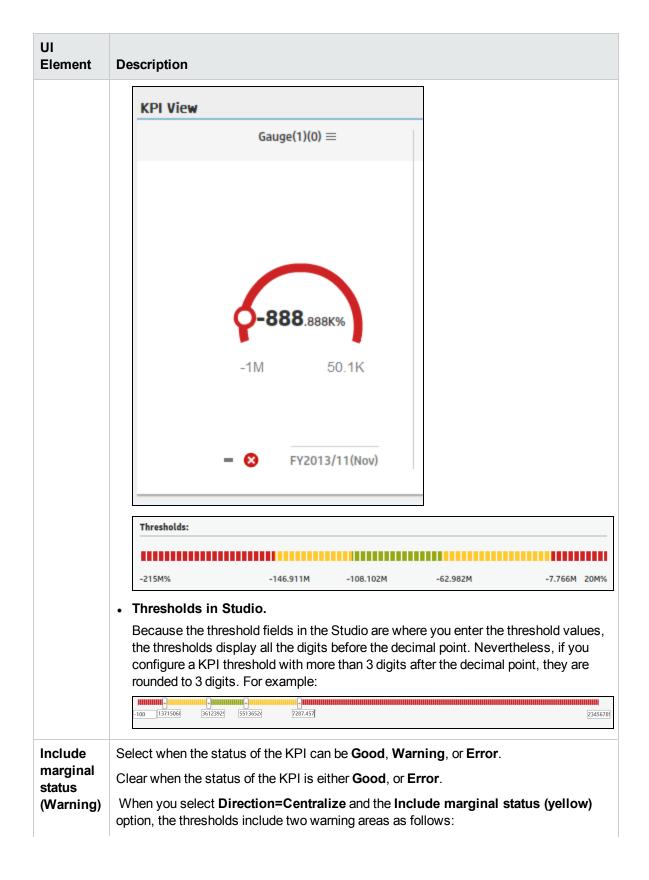
### **Result Threshold**

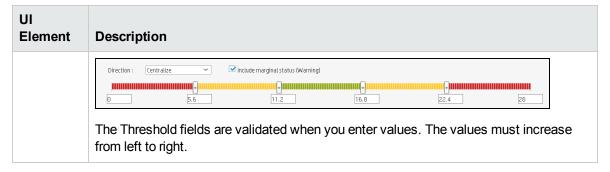
User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets):

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

UI Element	Description
Direction	<ul> <li>Select:</li> <li>Centralize. 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>Minimize. When the status of the KPI is best when it is low.</li> <li>Maximize. When the status of the KPI is best when it is high.</li> </ul>
	<ul> <li>Example</li> <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>

## UI Element Description Slide the arrows to select the relevant thresholds in the boxes attached to the arrows. Threshold The threshold is used to assign a status to the KPI. For details on statuses, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51. You can also enter the value by typing text in the box. The slider adjusts automatically. 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. 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 10000000. **Example** 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). Result Threshold ✓ Include marginal status (Warning) Direction: Minimize The Threshold fields are validated when you enter values. The values must increase from left to right. 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





## **Additional Details**

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

UI Element	Description
Business Motivation	Enter the business motivation of the KPI.
WOUVALION	This section is not relevant for Metrics.
Additional Info	Lists the additional information available for the KPI. It can be links to BO or Xcelsius reports, external links, or links to Dashboard pages.
	The table includes:
	Name. The name of the link or the reports.
	URL. The hyperlink to access additional external information.
	<ul> <li>Click the link to open the Edit Info Link dialog box where you can edit the selected additional information. For details, see "KPI or Objective Additional Information" on page 181.</li> </ul>
	Click to delete the selected additional information.
Owner	The owner of the active KPI.
	The list of available owners corresponds to the users that were defined in <b>Admin</b> > <b>Users and Roles</b> > <b>User Management</b> . For details, see User Management in the <i>IT Executive Scorecard Administrator Guide</i> .
Add	Click to open the <b>Add Info Link</b> dialog box where you can add additional information for the KPI. For details, see "KPI or Objective Additional Information" on page 181.

# 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 136.

To learn about Shared KPIs, see "Objective's KPIs" on page 94.

## To access:

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





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

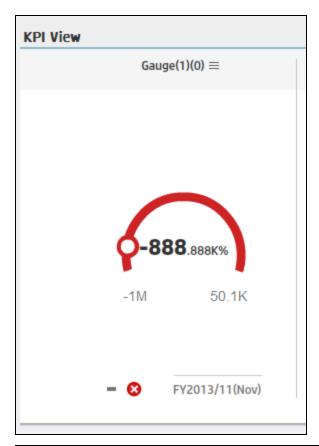
This section describes the information related to a KPI or Metric:

## 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.

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 9999999 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 "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.

**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).

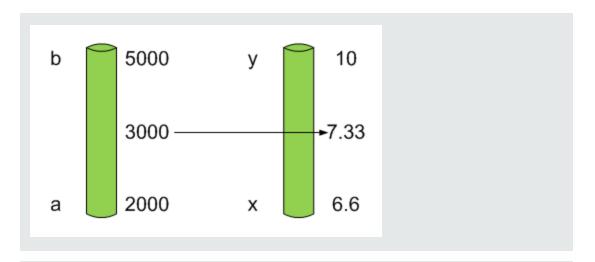
The Score calculation process is as follows:

- 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.

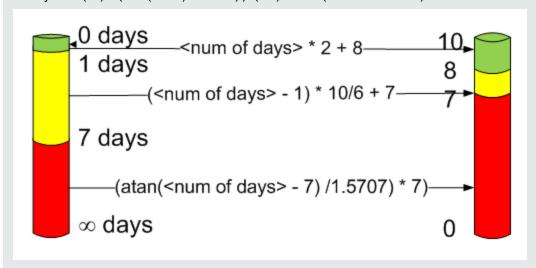
Any value on the MTTR scale needs to be transformed into the score scale by linear or exponential transform. Since the lower threshold is not set (it is equal to  $\infty$ ), the formula is different:

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

10 days  $\rightarrow$  F(10) = (atan(10 - 7) / 1.5707))\* (7-0) = 4.43 (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.

## **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 gueries that run on the database.

You can use additional variables and entities by creating business contexts using Context Designer. For details, see Semantic Layer - Context Designer in the *IT Executive Scorecard Administrator Guide*.

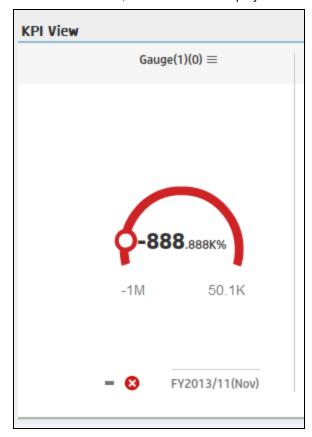
# Impact of changes to configurations in the Studio on the display in Dashboard and the EXPLORER tab

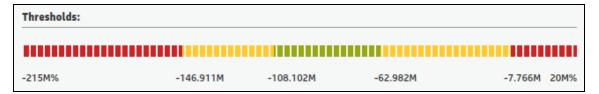
Changes in the Studio have impacts on the display in Dashboard and Explorer. For details, see "Synchronization of Changes in the Studio with Display in the Dashboard and the EXPLORER tab" on page 164.

#### **Decimal Precision**

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

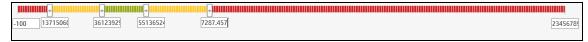
• Studio/Dashboard/Explorer Active Tree/Thresholds in Explorer. The values of KPIs and Metrics are displayed with a maximum of 6 digits and if needed a decimal point. Digits after the decimal point are rounded to 3 digits maximum. Digits before the decimal point are rounded to 3 digits maximum and K, 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 9999999 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

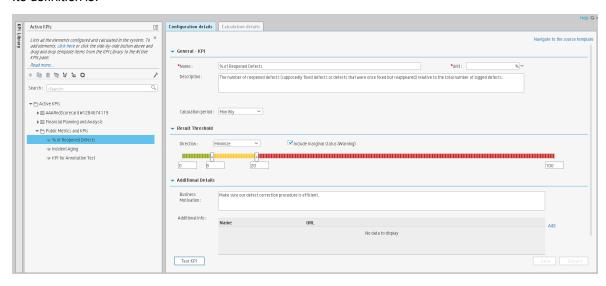
When you create a Context, you select tables, create links between the tables, and select the relevant columns in the tables to be part of the Context. For details, see Semantic Layer - Context Designer in the *IT Executive Scorecard Administrator Guide*.

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:

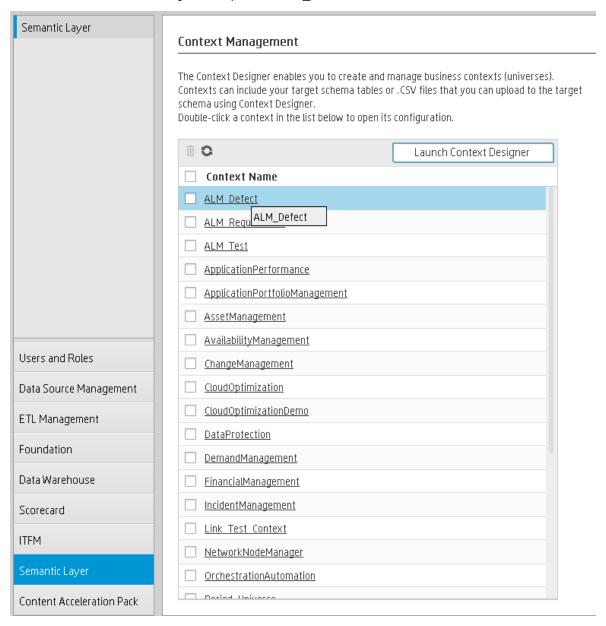
RATIO\_MATH(COUNT\_DISTINCT( DefectHist.Defect , DefectHist.ReopenFlag =1 And Defect.Status <> 'Closed') , COUNT( Defect ,DefectDefectSummary<> 'INVALID' And Defect.DefectSummary<> 'UNKNOWN' ),0)\*100

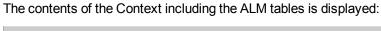
Its definition is:

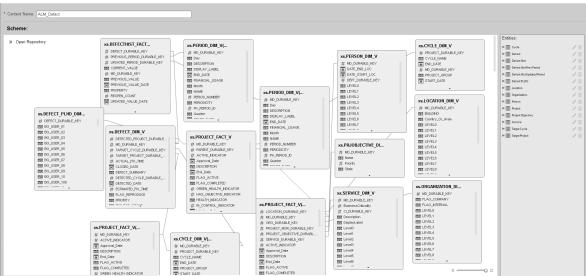


The Business Context is ALM\_Defect.

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

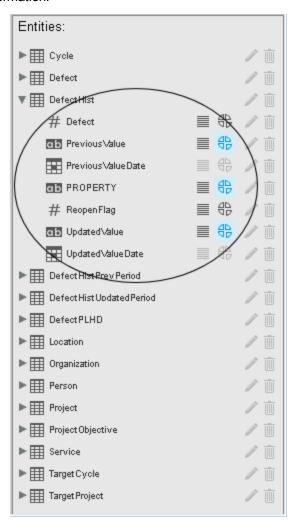






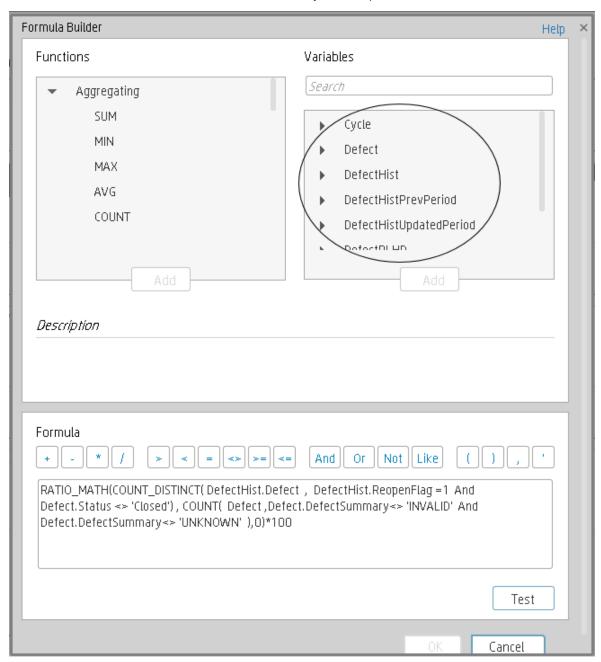
In the Entities area on the right, you can see the tables and the table columns that were selected to be part of the ALM\_Defect Context itself.

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:

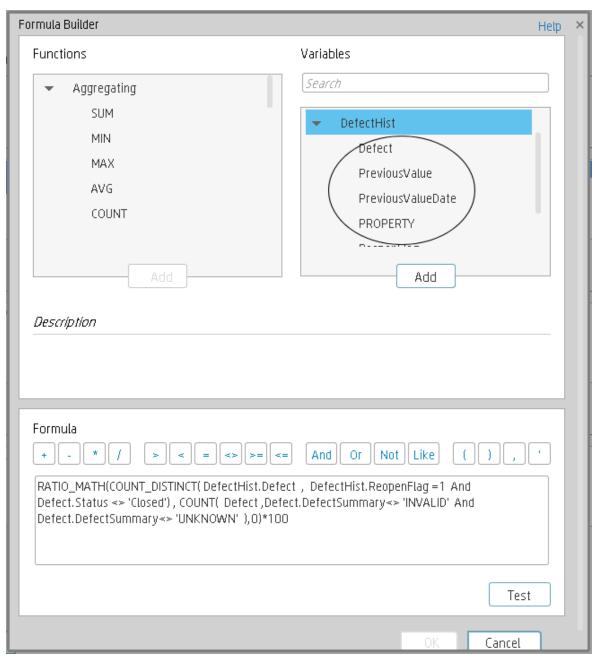


The **Defect\_Hist** table corresponds to one of the entities (**DefectHist**) that appears in the list of Variables that can be used when creating or modifying the formula of a KPI based on the **ALM\_Defect** context. To access the KPI or Metric formula, click **Studio**, highlight the relevant KPI (**% 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 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 in the *IT Executive Scorecard Business Analyst Guide*).





This section includes the following tasks:

# Use Case - 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 Access 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:

		Results for			
Formulas	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.

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

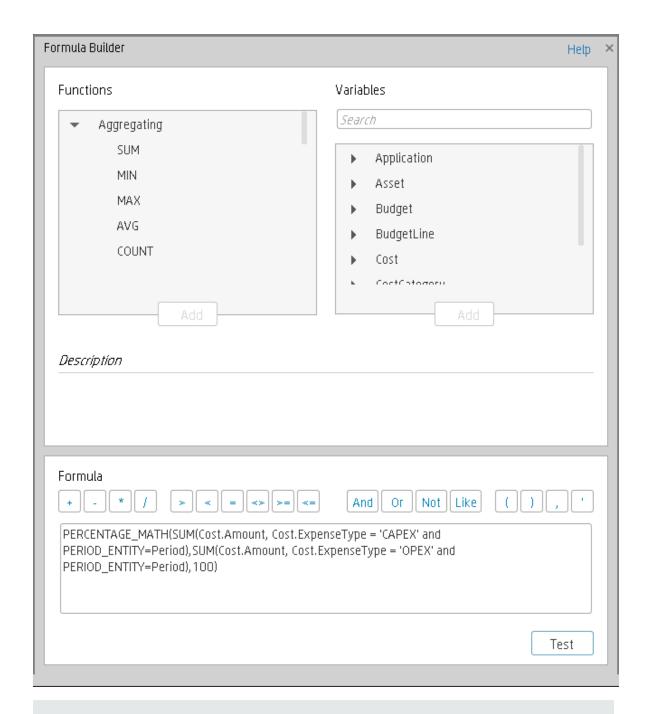
When performing a Recalculation on the Context related to the INCIDENT KPI:

- 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.

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



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
Functions	<ul> <li>Aggregating. The list of aggregating functions you can use in the KPI or Metric formula. For details, see "Aggregating Functions" below.</li> </ul>
	• <b>Mathematical</b> . The list of mathematical functions you can use in the KPI or Metric formula. For details, see "Mathematical Functions" on page 129.
	• <b>Date Constants</b> . The list of date constants you can use in the KPI or Metric formula. For details, see "Date constant" on page 130.
Add	<ul> <li>Click the Add button under the Functions box to add the selected function to the formula box at the end of the current expression.</li> </ul>
	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.

## • Aggregating Functions

The aggregating functions are as follows:

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

UI Element	Description
	<pre>Example MIN(Cost.Amount, Cost.CostType="Actual")</pre>
	<b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace <filter expression=""> with a "*" (star).</filter>
	Example If, for example, the Cost Type values are Actual and Planned, instead of MIN(Cost.Amount, Cost.CostType="Actual" or Cost.CostType="Planned") write MIN(Cost.Amount, *).
MAX	<b>Formula:</b> MAX( <entityname>.<fieldname>, <filter expression="">) Returns the highest value of the field values of the entities that satisfy the condition specified by the Filter Expression.</filter></fieldname></entityname>
	<b>Example</b> MAX(Cost.Amount, Cost.CostType="Actual")
	<b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace <filter expression=""> with a "*" (star).</filter>
	Example If the Cost Type values are Actual and Planned, instead of MAX(Cost.Amount, Cost.CostType="Actual" or Cost.CostType="Planned") write MAX(Cost.Amount, *).
AVG	Formula: AVG ( <entityname>.<fieldname>, <filter expression="">)</filter></fieldname></entityname>
	Returns the average of the field values of the entities that satisfy the condition specified by the Filter Expression.
	<pre>Example AVG(Cost.Amount, Cost.CostType="Actual")</pre>
	<b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace <filter expression=""> with a "*" (star).</filter>
	Example If the Cost Type values are Actual and Planned, instead of AVG(Cost.Amount, Cost.CostType="Actual" or Cost.CostType="Planned") write AVG(Cost.Amount, *).
COUNT	Formula: COUNT ( <entity name="">, <filter expression="">)</filter></entity>
	Returns the number of entities that satisfy the condition specified by the Filter Expression.
	<pre>Example COUNT(Cost, Cost.CostType ='Actual')</pre>

UI Element	Description
	<b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace <filter expression=""> with a "*" (star).</filter>
	Example If the Cost Type values are Actual and Planned, instead of COUNT(Cost.Amount, Cost.CostType="Actual" or Cost.CostType="Planned") write COUNT(Cost.Amount, *).
COUNT_ DISTINCT	Formula: COUNT_DISTINCT ( <entity name="">.<field name="">, <filter expression="">)</filter></field></entity>
	Returns the number of distinct values of the field in all the entities that satisfy the condition specified by the Filter Expression.
	<pre>Example COUNT_DISTINCT(Service.Name, Service.Name &lt;&gt; 'UNKNOWN')</pre>
	<b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace <filter expression=""> with a "*" (star).</filter>
	Example If the Cost Type values are Actual and Planned, instead of COUNT(Service.Name.Service.Name, Cost.CostType="Actual" or Cost.CostType="Planned") write COUNT (Service.Name.Service.Name, * ).
PERCENTAGE	Formula: PERCENTAGE ( <entity name="">, <filter expression1="">, <filter expression2="">,defaultValue)</filter></filter></entity>
	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.
	<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.
	<pre>Example PERCENTAGE(Cost, Cost.CostType ="Actual", Cost.CostType ="Planned", 0)</pre>
	<b>Note:</b> If you want to filter a calculation using all the possible values of the raw data, you can replace <filter expression=""> with a "*" (star).</filter>
	Example If the Cost Type values are Actual and Planned, instead of PERCENTAGE(Cost, Cost.CostType="Actual", Cost.CostType="Actual" or Cost.CostType="Planned", 0) write PERCENTAGE

UI Element	Description
	(Cost, Cost.CostType="Actual", * , 0).

## • Mathematical Functions

The mathematical functions are as follows:

UI Element	Description
SUM_MATH	<b>Formula:</b> SUM_MATH (arg1, arg2, arg3,) Returns the sum of the set of arguments.
	Example SUM_MATH(6.36, 11.02, 51, -2.44, MAX(Cost.Amount, Cost.CostType='Actual'))
MIN_MATH	Formula: MIN_MATH (arg1, arg2,)
	Returns the lowest value of the set of arguments.
	<pre>Example MIN_MATH(SUM(Cost.Amount, Cost.CostType ='Actual'), SUM(Cost.Amount, Cost.CostType ='Planned'))</pre>
MAX_MATH	Formula: MAX_MATH (arg1, arg2,)
	Returns the highest value of the set of arguments.
	<pre>Example MAX_MATH(COUNT(Incident, Incident.Status='Open'), COUNT(Incident, Incident.Status='Reopened'))</pre>
AVG_MATH	Formula: AVG_MATH (arg1, arg2,)
	Returns the arithmetic average of the set of arguments.
	Example AVG_MATH(6.36, 11.02, 51, -2.44, SUM(Cost.Amount, Cost.CostType='Actual'))
PERCENTAGE_	Formula: PERCENTAGE_MATH(numerator,denominator, defaultValue)
MATH	Returns the ratio, expressed as percentage of arguments: (numerator /
	denominator) * 100. defaultValue is optional and can be either an integer of 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.
	<pre>Example PERCENTAGE_MATH(Defect, Defect.severity = "High" , *)</pre>
RATIO_MATH	Formula: RATIO_MATH(numeratorVal,denominatorVal, defaultValue)

UI Element	Description
	The function divides numerator by denominator. If denominator is 0 then the function returns defaultValue, or zero if <defaultvalue> is not provided. defaultValue is optional and can be either an integer of 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.</defaultvalue>
	<pre>Example RATIO_MATH(SUM(Cost.Amount,Cost.CostType='Actual'), SUM(Cost.Amount,Cost.CostType='Planned'),0)</pre>
DATE_ CONVERT	Formula:  DATE_CONVERT( <sourceformat>, <destinationformat>, <mathematical date="" function="">)</mathematical></destinationformat></sourceformat>
	Converts the results of <mathematical date="" function=""> from the source format into the destination format.</mathematical>
	Source Format can be one of the following: 'MS', 'S', 'M', 'H'.
	Destination Format can be one of the following: 'S', 'M', 'H', 'D'. 'MS' = Millisecond, 'S' = Second, 'M' = Minute, 'H' = Hour, 'D' = Day
	<pre>Example DATE_CONVERT('MS','H', AVG(Incident.OutageEnd, PERIOD_ENTITY=OutageStartPeriod) - AVG(Incident.OutageStart,PERIOD_ENTITY=OutageStartPeriod) )</pre>

## Date constant

The dates are as follows:

UI Element	Description
IN _PERIOD	Formula: <entityname>.<fieldname> IN_PERIOD</fieldname></entityname>
	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.
	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> .
	Example
	<ul> <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> </ul>
	• COUNT(Defect, Defect.Open_In_Date IN_PERIOD) - COUNT

UI Element	Description	
	(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.	
IN_ CURRENT_ YEAR	Formula: <entityname>.<fieldname> IN_CURRENT_YEAR  Use in Filter expressions to specify the condition relative to the current year during the calculation.  Example 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.  For example: FY2011 or FY2009.</fieldname></entityname>	
END_PERIOD	Formula: <entityname>.<fieldname> conditional operator END_PERIOD  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.  If you select Daily for the Calculation Period of a KPI/Metric, and if the KPI/Metric formula contains in_period(-XX), end_period(-XX), or Period_entity = Period (-XX), XX must be less than or equal to 365.</fieldname></entityname>	
	<ul> <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>	
PERIOD_ ENTITY	Formula: PERIOD_ENTITY=Period  Use in Filter expressions to specify the entity that represents the PERIOD table that calculation are based on.	

UI Element	Description	
	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. 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> .	
	Examples	
	• COUNT(Incident, PERIOD_ENTITY = CreateTimePeriod)	
<ul> <li>COUNT(SLAStatus, PERIOD_ENTITY = Period(-12)) In this case</li> <li>period is shifted 12 periods back. 01/13 is shifted to 01/12.</li> </ul>		
KPI_ PERIODICITY_ TYPE	Formula: KPI_PERIODICITY_TYPE=Period  A constant that is replaced by the specific KPI or Metric Calculation Period that is to be used for the calculation. For details, see "KPI or Metric Configuration and Calculation Details" on page 99.	
	<pre>Example COUNT(Incident, CreateTimePeriod.Periodicity = KPI_ PERIODICITY_TYPE)</pre>	
NOW	A constant that is replaced by the current calculation date during the calculation.	
	Example COUNT(Incident, NOW - Incident.CreateTime > 5*DAY)	
HOUR	A constant that represents one hour.	
	Example COUNT(Incident, NOW - Incident.CreateTime > 5*HOUR)	
DAY	A constant that represents one day.	
	Example COUNT(Incident, NOW - Incident.CreateTime > 5*DAY)	
WEEK	A constant that represents one week.	
	Example COUNT(Incident, NOW - Incident.CreateTime > 5*WEEK)	

## **Variables**

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

UI Element	Description
Variables	The list of variables you can use in the KPI or Metric formula.  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 .  Note: 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.
<search></search>	Enter a string to filter for the entities and fields whose name includes the string.
Add	<ul> <li>Click the Add 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 Add 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
Description	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:
	• = (equal)
	<b>Syntax</b> : op1 = op2

UI Element	Description
	<ul> <li>&gt; (greater than)</li> <li>Syntax: op1 &gt; op2</li> <li>&lt; (smaller than)</li> <li>Syntax: op1 &lt; op2</li> <li>&gt;= (greater than or equal to)</li> <li>Syntax: op1 &gt;= op2</li> <li>&lt;= (smaller than or equal to)</li> <li>Syntax: op1 &lt;= op2</li> <li>&lt;&gt; (not equal)</li> <li>Syntax: op1 &lt;&gt; op2</li> </ul>
And Or Not Like	<ul> <li>Use these buttons to enter the relevant logical operators into the formula. The logical operators are:</li> <li>like Syntax: operand like char %     Matches a specific pattern. % is a wildcard character meaning `match any characters'. Applicable on string type operand.</li> <li>AND. Logical AND.     Syntax: (expr1) AND (expr2)</li> <li>OR. Logical OR.     Syntax: (expr1) OR(expr2)</li> <li>NOT. Returns the opposite of a boolean expression.     Syntax: NOT (expr)</li> </ul>
(), '	Use these buttons to enter the corresponding elements into the formula.
<formula box=""></formula>	The formula appears as you are building it using the variables, functions and buttons.
Test	Click to validate and test the formula and the filter.  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.
OK/Cancel	Click:  OK to transfer the selected formula to the Formula box of the Calculation details tab.  Cancel to cancel the changes.  Note: In the Calculation details tab, the Save and

UI Element	Description
	<b>Discard</b> buttons become enabled and you can click <b>Save</b> to save the changes.

## 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 112.

To learn about Shared KPIs, see "Objective's KPIs" on page 94.

#### To access:

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





## **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 Semantic Layer - Context Designer in the *IT Executive Scorecard Administrator Guide*.

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

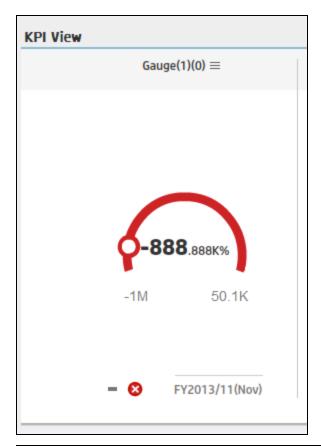
This section describes the information related to a KPI or Metric:

## 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.

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 "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.

**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).

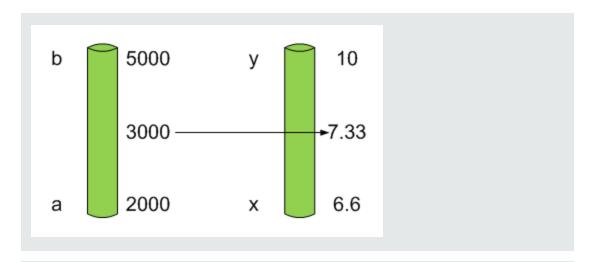
The Score calculation process is as follows:

- 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.

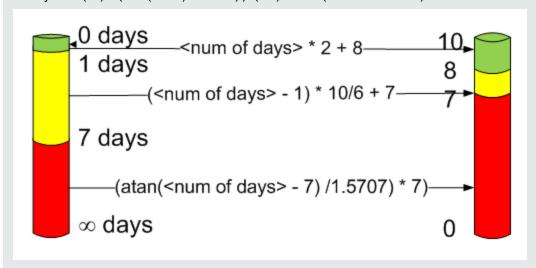
Any value on the MTTR scale needs to be transformed into the score scale by linear or exponential transform. Since the lower threshold is not set (it is equal to  $\infty$ ), the formula is different:

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

10 days  $\rightarrow$  F(10) = (atan(10 - 7) / 1.5707))\* (7-0) = 4.43 (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 164.



This section includes the following tasks:

•	Modify a KPI or Metric filter	14	0
•	Test Changes Made to a KPI or Metric Configuration	14	C
•	Use Case - Filter Components	14	.1

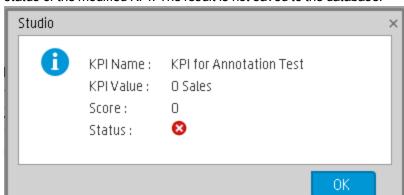
# Modify a KPI or Metric filter

- 1. In the Active KPIs pane, select the relevant KPI or Metric. The Configuration Details and Calculation Details tabs are displayed.
- 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.
- 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.

# Use Case - Filter Components

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

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

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

To filter using the Page Filter component:

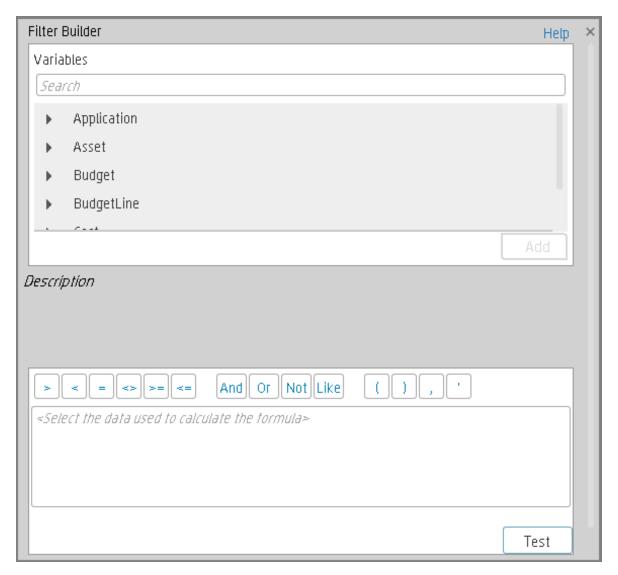
- 1. In the Executive Dashboard, select the relevant page (click the **Page Gallery** button if the page you want does not already appear in the Dashboard).
- 2. Click the **Components** button.
- 3. In the Component Gallery dialog box that opens, double-click the Page Filter component (for details, see The Page Filter Component) to place it in the layout area, or select the component and drag it to an area on the page, and close the Component Gallery page. For details, see Component Gallery Dialog Box.
  - If the target area is hidden by the Component Gallery dialog box, click the Component Gallery dialog box title bar and drag it to another location on your screen.
  - If you are dragging a new component to a target area that already has a component defined, drag
    the new component to the title bar of the target area, and not to the part of the component that is
    colored white.
- 4. Close the Component Gallery dialog box.
- 5. The basic configuration of the Page Filter component includes the **Period** filter. Select a time period and click the **Filter** button and all the data of the components located on the same page, is filtered automatically based on the selection you made.

- 6. You can add additional fields to the component and filter the page according to them. To do so, click the Configure Component icon. A list of available dimensions appears in the Available dimensions pane. Those dimensions are created based on the KPI or Metric Breakdown configurations you set earlier in the Studio.
- 7. Select one of more dimensions and move them to the **Selected dimensions** area.
- 8. Click **OK**. The new dimensions appear in the Page Filter and you or the Executive user can use them to refine, in addition to the time period, the filtering of the other components of the page.
- 9. To clean the filter selection, click the Clean filter option.
- 10. Once you filter the page according to your needs, click **Save**.

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



Filter Builder Dialog Box



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

UI Element	Description
Variables	The list of variables you can use in the KPI or Metric filter.
	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 .
	<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.

UI Element	Description
	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.
<search></search>	Enter a string to filter for the entities and fields whose name includes the string.
Description	A description of the variable you have selected in the Variables area.
> < = <> >= <=	Use these buttons to enter the corresponding conditional operators in the filter. The condition operators are:  • = (equal) Syntax: op1 = op2  • > (greater than) Syntax: op1 > op2  • < (smaller than) Syntax: op1 < op2  • >= (greater than or equal to) Syntax: op1 >= op2  • <= (smaller than or equal to) Syntax: op1 <= op2  • <= (smaller than or equal to) Syntax: op1 <= op2  • <> (not equal) Syntax: op1 <> op2
And Or Not Like	<ul> <li>Use these buttons to enter the corresponding logical operators into the filter. The logical operators are:</li> <li>like Syntax: operand like char%     Matches a specific pattern. % is a wildcard character meaning `match any characters'. It is applicable on string type operand.</li> <li>AND. Syntax: (expr1) AND (expr2)     Logical AND</li> <li>OR. Syntax: (expr1) OR(expr2)     Logical OR</li> <li>NOT. Syntax: NOT (expr)     Returns the opposite of a boolean expression.</li> </ul>
(), '	Use these buttons to enter the corresponding elements into the filters.
<filter box=""></filter>	The filter appears as you are building it using the variables, functions and buttons.
Test	Click to validate and test the formula and the filter.  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.

UI Element	Description
OK/Cancel	Click:  OK to transfer the selected formula to the Filter box of
	Note: In the Calculation details tab, the Save and Discard buttons become enabled and you can click Save to save the changes.
	Cancel to cancel the changes.

### 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 SAP BusinessObjects Enterprise Contexts (Universes) in the *IT Executive Scorecard Content Reference Guide*.

#### To access:

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





#### **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 Semantic Layer -Context Designer in the IT Executive Scorecard Content Reference Guide.

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
- 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
- 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*
- 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
- 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
- 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 164.



#### This section includes:

•	Change the business context of a KPI	.14	18
•	Test changes made to a KPI configuration	14	18

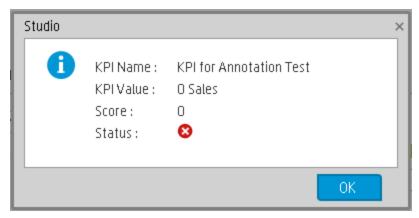
### Change the business context of a KPI

- 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 112 or "KPI or Metric Filter" on page 136.

### Test changes made to a KPI configuration

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

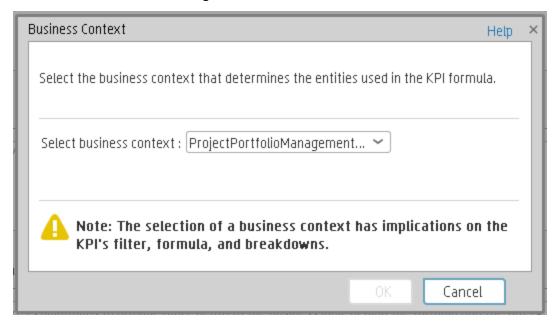
- After you have changed the configuration of a KPI in the Calculation details tab or in the Configuration details tab, click Save to save your changes. The Test KPI button is enabled.
- 2. Click the **Test KPI** button to test the changes you made to the KPI configuration. The KPI value is calculated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



### **Select Business Context Dialog Box**

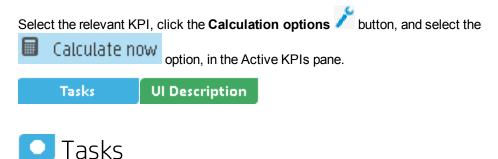


UI Element	Description
Select business	Select the relevant business context.  The business context determines the business entities that are available to be used
context	in the formula used to calculate the value of the KPI.

### 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:



### Perform a Calculation After Configuration Change

This task includes the following steps:

### 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 112 or "KPI or Metric Filter" on page 136.

### 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.

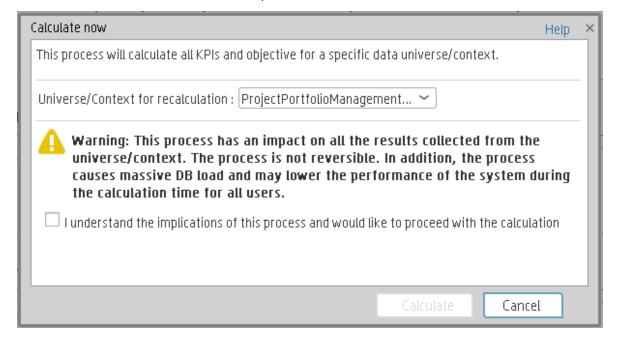
#### 3. Results

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



### 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.

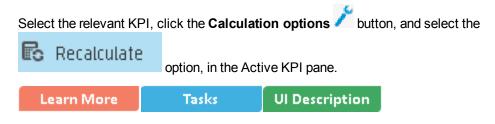


UI Element	Description
Universe/context for recalculation	Select the relevant context (data source) you want to use for the recalculation.
I understand the implications of this process and would like to proceed with the calculation	Select this option to proceed with the calculation.
Calculate	Click to 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:





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



### 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 112 or "KPI or Metric Filter" on page 136.

### 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



- 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.

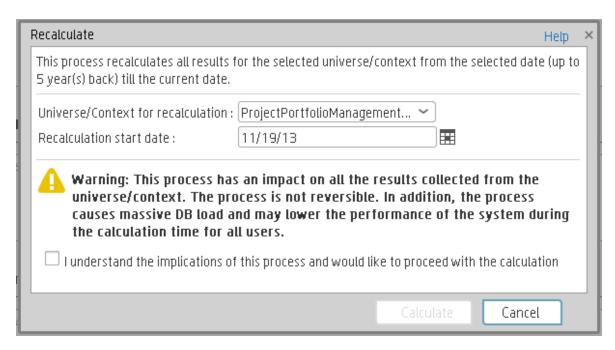
#### 3. Results

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



### **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.

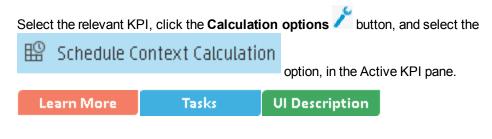


UI Element	Description
Universe/context for recalculation	Select the relevant universe/context for which you want to recalculate all results.
Recalculation start date	<ul> <li>Select the date from which to start the historical recalculation. The recalculation is performed for the period starting from the specified date till the current date.</li> <li>Limitation: <ul> <li>The recalculation period is limited to 1 year back from the date you specified in the Recalculation Start Date.</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 Recalculation Start Date. The default can be modified; for details, see Engine Settings in the IT Executive Scorecard Administrator Guide.</li> </ul> </li> </ul>
I understand the implications of this process and would like to proceed with the calculation	Select this option to proceed with the recalculation.
Calculate	Click to start the recalculation.  Limitations: 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:





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.

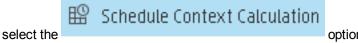


### Schedule a business context calculation

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



Note that you schedule the calculation per Business Context.

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

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

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

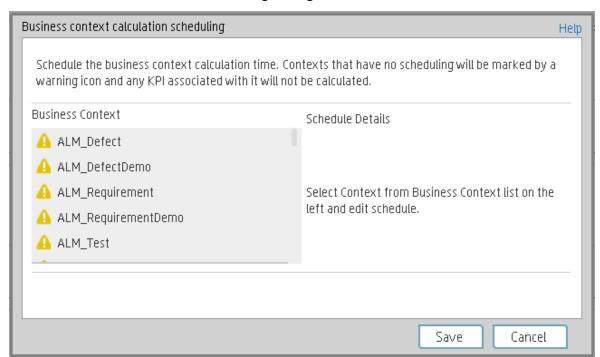
At the scheduled time, the following processes take place:

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

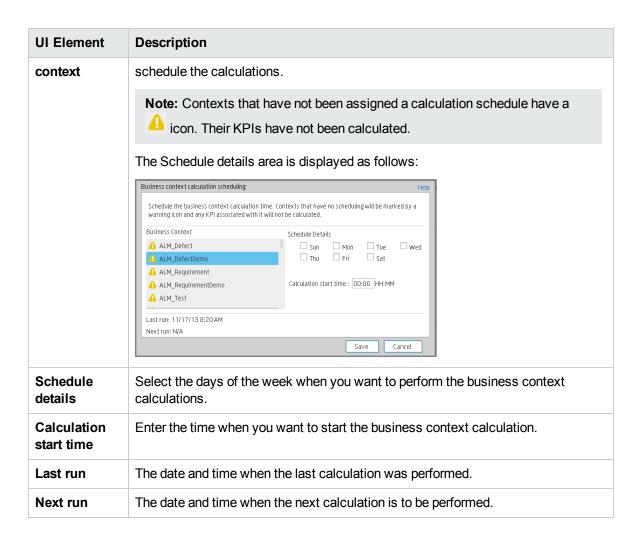
**Movie:** To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see Access Movies.



### **Business Context Calculation Scheduling Dialog Box**



UI Element	Description
Business	In the list of business contexts, select the business context for which you want to

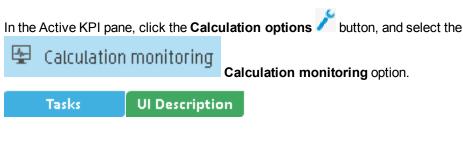


### Calculation and Recalculation Monitoring

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:





### This section includes:

# 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 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



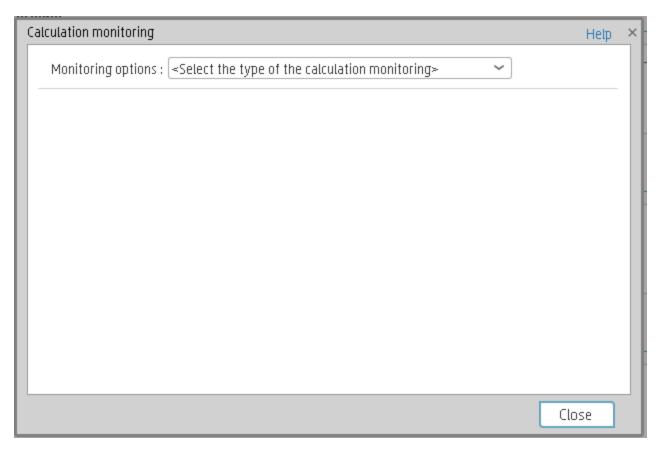
Calculation monitoring option.

- 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.



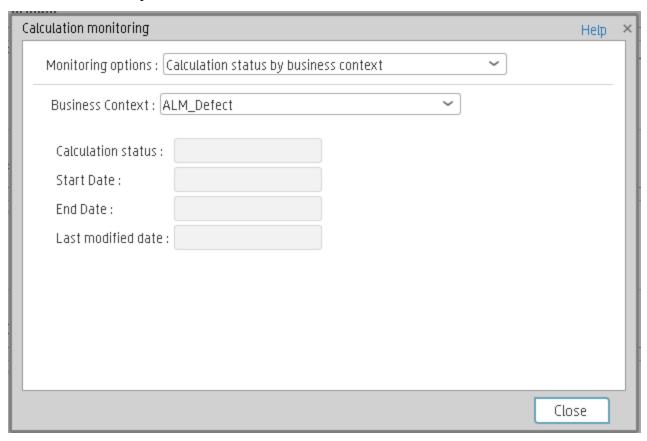
### **Calculation Monitoring Dialog Box**

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.



UI Element	Description
Monitoring options	Calculation status by Business Context. To monitor the calculation or recalculation history of the selected Business Context. For details, see " <calculation business="" by="" context="" status="">" on the next page."</calculation>
	Calculations running now. To view the Business Contexts that are currently being calculated or recalculated. For details, see " <calculations currently="" running="">" on page 163.</calculations>
Business Context	Select the Business Context you want to monitor in the drop down list. The list displays all the Business Contexts.

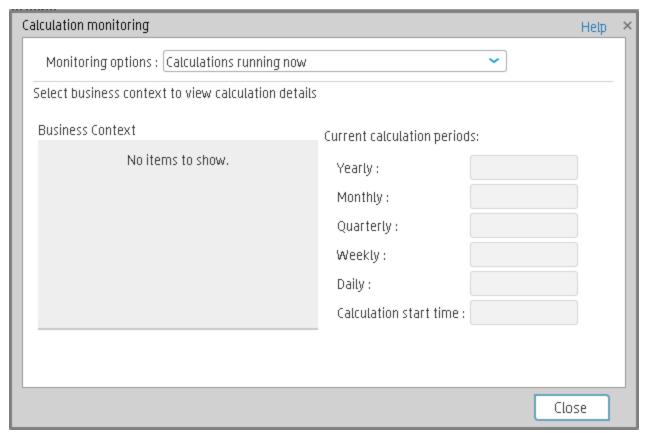
### <Calculation status by Business Context>



UI Element	Description
Business Context	Select the relevant Business Context in the drop down list. The list displays all the Business Contexts.
Status	The status of the calculation or recalculation. It can be: Running Now, Not Calculated, Error, or Finished.
Start Date	The date and time when the calculation or recalculation started.
End Date	The date and time when the calculation or recalculation ended. When the calculation or recalculation is still running, the field is empty.
Last modified date	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>



UI Element	Description
Business Context	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.
Current calculation periods	This area displays the calculation periods ( <b>Yearly</b> , <b>Monthly</b> , <b>Quarterly</b> , <b>Weekly</b> , or <b>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 184.
- 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 172
- 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 176.
- 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 181.
- Adding Cascading Scorecards to track performance measurement in a top-down approach based on Scorecard objective ownership. For details, see "Cascading Scorecards" on page 184.

### 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.





#### **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 enable the creation of Breakdowns. For details, see Semantic Layer - Context Designer.

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 176.
- 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 164.



#### This section includes:

•	Create a KPI Breakdown	.167
•	Create a KPI Breakdown of a KPI Breakdown	168
•	Remove a Breakdown	.168
•	Use Case - Create KPI Breakdowns and Configure Breakdown Override	160

### 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



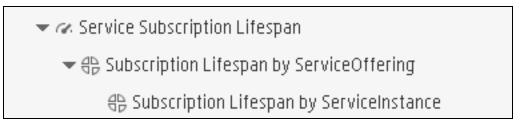
5. You can add more than one breakdowns.

### 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.

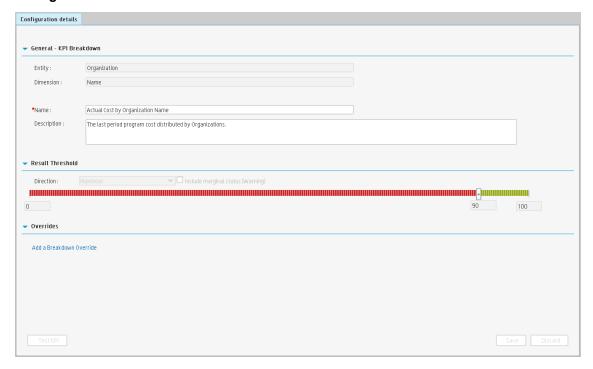
- Right-click the relevant KPI Breakdown, and select Delete option in the menu that opens. If you select a Breakdown that has child Breakdowns, these child Breakdowns are also deleted after you confirm the action.
- 3. Confirm the deletion when you are prompted to do so.

## Use Case - Create KPI Breakdowns and Configure Breakdown Override

For details, see Use Case - Create KPI Breakdowns and Configure Breakdown Override in the *Getting Started with IT Executive Scorecard*.



### Configuration Details Tab for a KPI Breakdown



### **General Information**

UI Element	Description
Test KPI	Click to test the KPI.
	The button is disabled for KPI Breakdowns.

UI Element	Description
Save	Click to save the changes.
Discard	Click to discard the changes you have made since the last <b>Save</b> operation.

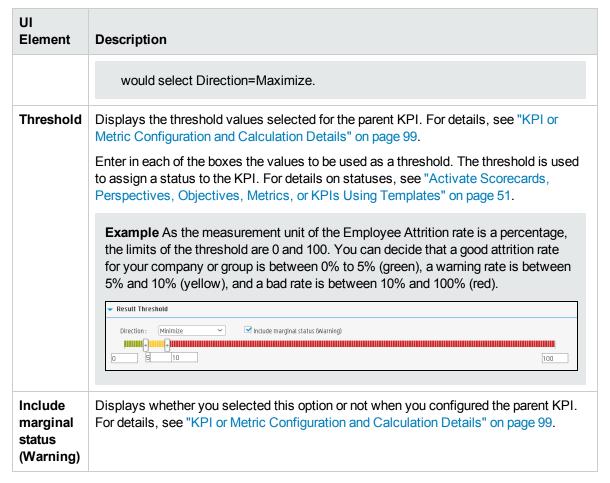
### General - KPI Breakdown

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

UI Element	Description
Entity	The name of the entity you selected when creating the KPI Breakdown.
Dimension	The name of the dimension you selected when creating the KPI Breakdown.
Name	The name of the KPI Breakdown.  Its format is <kpi_name> by <entity_name> <dimension_name>.</dimension_name></entity_name></kpi_name>
Description	The description of the KPI. <b>Limitations:</b> The maximum number of characters is 1000.
Id	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 Admin > Scorecard > XS Settings, and in Debug Mode, select the Application Debug Mode setting.
Туре	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 Admin > Scorecard > XS Settings, and in Debug Mode, select the Application Debug Mode setting.

### **Result Threshold**

UI Element	Description
Direction	Displays the threshold direction selected for the parent KPI. For details, see "KPI or Metric Configuration and Calculation Details" on page 99.
	<ul> <li>Example</li> <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</li> </ul>



#### **Overrides**

UI Element	Description
Add a breakdown override	Click to open the Add a Breakdown Override dialog box. For details, see "KPI and Metric Breakdown Overrides" on page 176.
Name	The name of the override you just created. Its format is: <kpi_name>: <result_kpi_to_override></result_kpi_to_override></kpi_name>
0	<b>Edit.</b> Click to edit the selected override. For details, see "KPI and Metric Breakdown Overrides" on page 176.
Ŵ	Remove. 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.





#### **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.

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 176.
- 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 164.



### This section includes:

•	Create a Metric Breakdown	.173
•	Create a Metric Breakdown of a Metric Breakdown	173
•	Remove a Breakdown	.174

### 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
- 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.

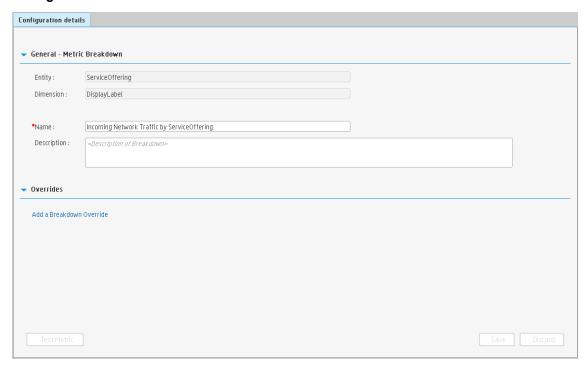
### Remove a Breakdown

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.



### Configuration Details Tab for a Metric Breakdown



### **General Information**

UI Element	Description
<areas></areas>	"General - Metric Breakdown" below "Overrides" below
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
Entity	The name of the entity you selected when creating the Metric Breakdown.
Dimension	The name of the dimension you selected when creating the Metric Breakdown.
Name	The name of the Metric Breakdown.  Its format is <metric_name> by <entity_name> <dimension_name>.</dimension_name></entity_name></metric_name>
Description	The description of the Metric.  Limitations: The maximum number of characters is 1000.

### **Overrides**

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





#### **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 166.

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 176.
- 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 164.



#### This section includes:

### 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:

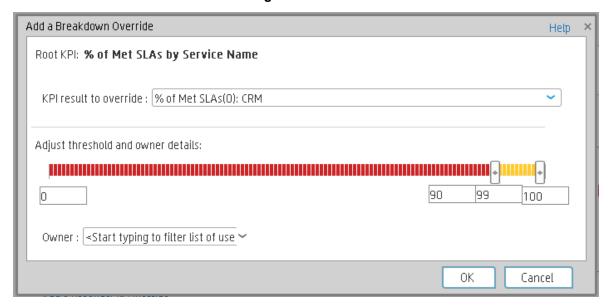
- 1. Select in the Active KPI pane, the relevant KPI Breakdown or Metric Breakdown.
- 2. In the Configuration details pane for that KPI or Metric, click **Add a Breakdown Override** link in the Override area.
- In the Add Breakdown Override dialog box that opens, select the relevant KPI result to override 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.

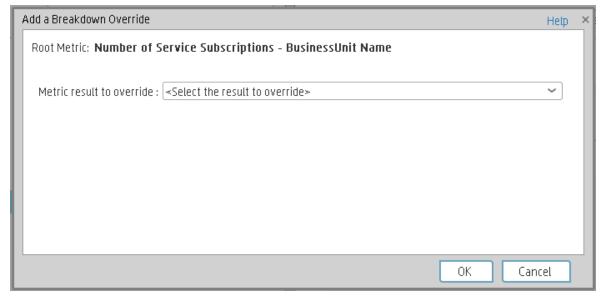
### Use Case - Create KPI Breakdowns and Configure Breakdown Override

For details, see Use Case - Create KPI Breakdowns and Configure Breakdown Override in the *Getting Started with IT Executive Scorecard*.



### Add or Edit a Breakdown Override Dialog Box





UI Element	Description
Root KPI	Displays the name of the parent KPI or Metric.
KPI result	The field lists the values of the dimension you selected for the KPI Breakdown or Metric

UI Element	Description
to override/ Metric result to override	Breakdown. You can assign a different threshold, and a different owner for each one of the dimension's values.
Adjust threshold and	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.
owner details	<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.
	For details on statuses, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.
Owner	Select the owner of the override.
ОК	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.
	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.
Cancel	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.





### **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 Ovierview 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 464.

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 164.



## Provide Additional Information for a KPI or an Objective

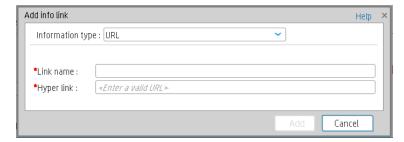
You can provide additional information for active KPIs or Objectives. That information can be links to other Dashboard pages, external pages, BO reports, or Xcelsius reports.

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 474.



### Add/Edit Info Link Dialog Box



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

UI Element	Description
Information	Select the type of information you want to provide:
type	• External link. When you want the user to access an external link from the KPI in the Dashboard.
	• <b>BO report</b> . When you want the user to access the selected BO report from the KPI in the Dashboard.
	Dashboard page. When you want the user to open a specific page in the Dashboard.
	Xcelsius report. When you want the user to access the Xcelsius report from the KPI or Objective in the Dashboard.
Link name	This field appears when you select External link in the Information type 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.
Hyper link	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.

UI Element	Description
Report name	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.
Dashboard page	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.
Add/Cancel	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.

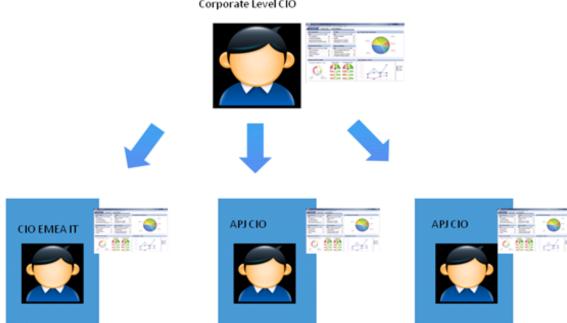




### Geographical Distribution.

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.

### Corporate Level CIO



### 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.

Insurance CIO

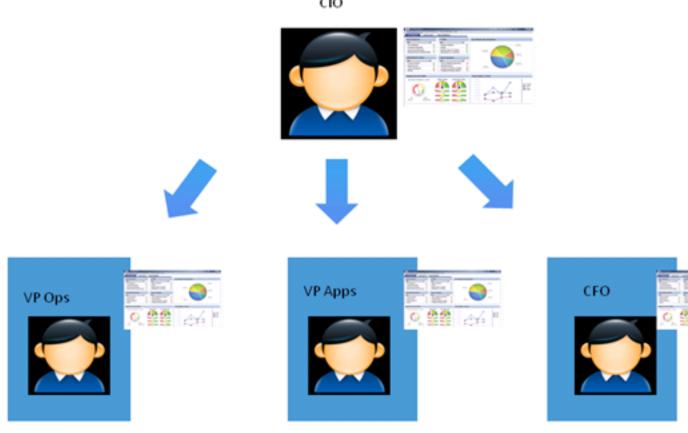
Trading CIO

A COMPANY OF THE STATE OF THE

### Organizational Distribution of IT.

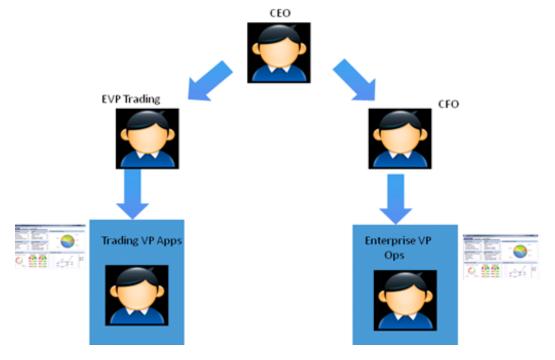
The CIO can measure his direct reports (Head of infrastructure and operations).

CIO



### 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 164.



#### This section includes:

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•	Remove a Cascading Scorecard	.188

# Use Case - 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).
- Click the Manage Cascading Scorecard link and double-click or use the arrow buttons to move the Scorecard you want to cascade to from the Available Scorecards pane to the Assigned Scorecards pane.
  - Note that you can select multiple Scorecards.
- 4. Click **OK** and then click **Save** to save the configuration.

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

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

### Remove a Cascading Scorecard

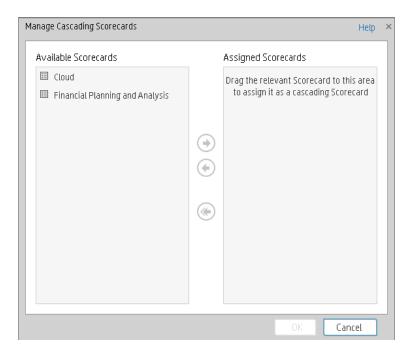
To remove a Cascading Scorecard so it is not assigned to the parent Scorecard:

- 1. In the Active KPIs pane, select the parent Scorecard.
- 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.



Manage Cascading Scorecards Dialog Box



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

UI Element	Description
Available Scorecards	Lists the Scorecards available to be assigned as Cascading Scorecards of the parent Scorecard.
Assigned Scorecards	Lists the Scorecards that you have selected to become the Cascading Scorecards of the parent Scorecard.
<b>(*)</b>	Select the relevant Scorecard and move it to the relevant field using the buttons.
ОК	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.



### This section includes the following tasks:

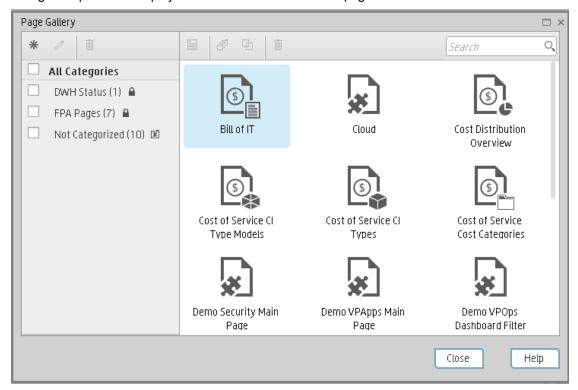
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# Display the Out-of-the-Box Pages

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.



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 199.

# 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 195.

**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 > Scorecard > Dashboard Settings**. For details, see Dashboard Settings 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 200.

**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 Breakdown View Component
  - The Bubble Chart View Component
  - The Cluster Bar Chart View Component
  - The Forecast Component
  - "The Historical Metric View Component" on page 287
  - "The Historical View Component" on page 298
  - "The KPI List Component" on page 309
  - "KPI Rolodex Component" on page 317
  - "The KPI View Component" on page 327
  - The Line and Bar Chart View Component
  - The Page Filter Component
  - "The Pie Chart Component" on page 355
  - "The Scorecard Component" on page 366

- The Stacked Bar Chart View Component
- "The SWF Report Viewer Component" on page 385
- The US Map Component
- "The Web Intelligence Report Viewer Component" on page 397
- "The Web Intelligence Static Report Viewer Component" on page 402
- The World Map Component
- "The Xcelsius Reports Viewer (Flash) Component" on page 419
- Create components and adding them to pages. For details, see "Customized Static or Dynamic URL Component" on page 430.

**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 438.

### Personalize the Dashboard

You can personalize the Dashboard by adding a picture of the owner. For details, see "Personalize a Dashboard Page" on page 445.

# 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.

Tasks UI Description



#### This section includes:

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Close a Page or Delete a Page	195
Add a page to the Dashboard	196
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### 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 453.

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 200.
- 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 200.

### Duplicate a page

To add a page, you can:

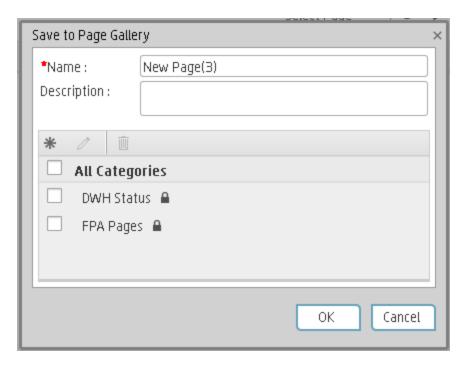
- 1. In the Dashboard, display the page you want to duplicate either by clicking the relevant tab or by selecting to display the page after clicking the **Page Gallery** button in the Dashboard toolbar and selecting the relevant page.
  - You can also open the Page Gallery, select the relevant page and 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.



Save to Page Gallery Dialog Box



User interface elements are described below:

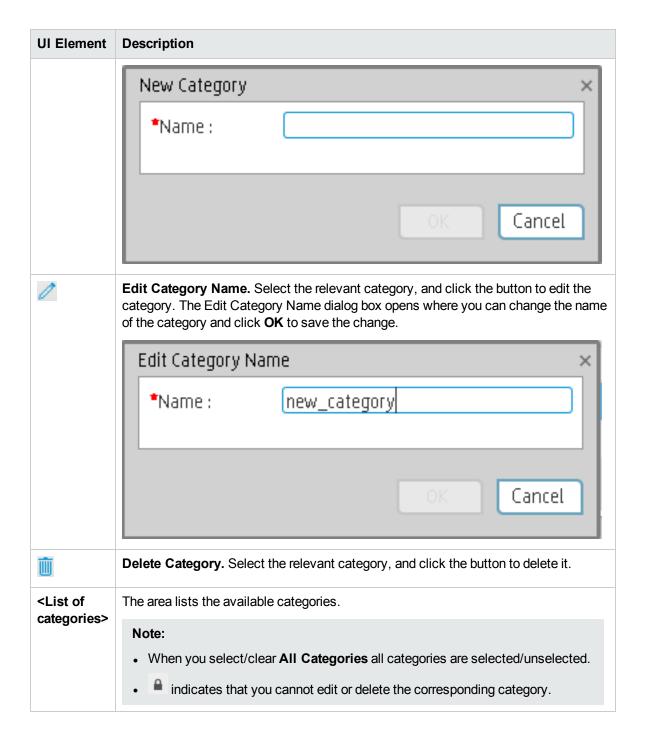
UI Element	Description
Name	Enter the name of the page as you want it to appear in the tab and in the Page Gallery.
Description	Enter the description of the page.
Save as new page	Click to duplicate the page. It is recommended to specify the name of the duplicated page in the <b>Name</b> field before 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
*	<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.



## 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.





- For a list of default pages, see "Dashboard" on page 453.
- Executive Scorecard includes default components. For a list of default components, see "Dashboard Display" on page 190.



#### This section includes:

•	Configure a Page Layout	200
•	Create a Dashboard Page and Add Components to the Page	. 201
•	Configure Page Layout – Populate a tabbed component in a page scenario	206
•	Use Case - Create a Dashboard Page and add a Scorecard Component to the Page	208

### 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).

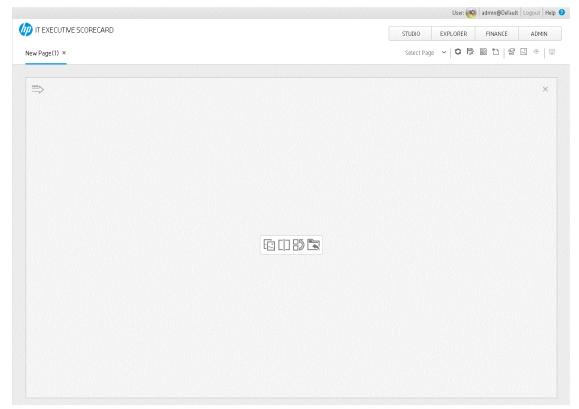
It is recommended that you plan in advance which components you want to place on your page and how they should be arranged, and then configure your page layout accordingly.

# Create a Dashboard Page and Add Components to the Page

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

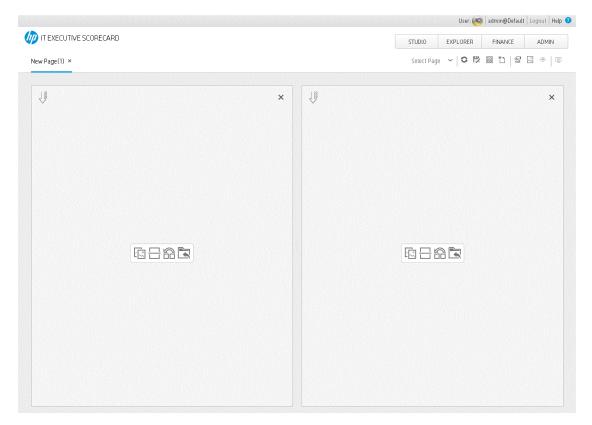
- 1. In the application, close all tabs to open the Dashboard.
- 2. Click the **New Page** button in the Dashboard toolbar. An empty page appears.



It has a single vertical layout by default.

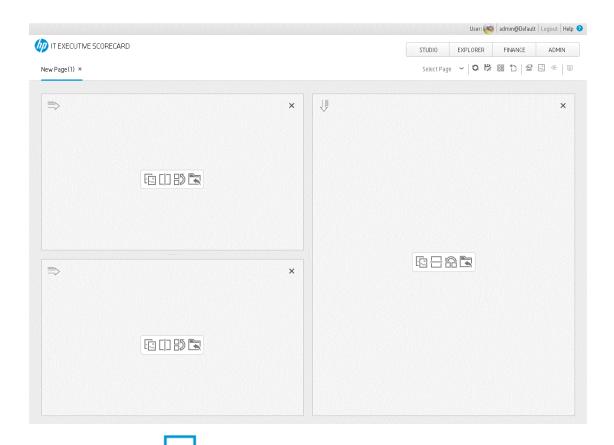
For more details, see Dashboard Page in the IT Executive Scorecard Business Analyst Guide.

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



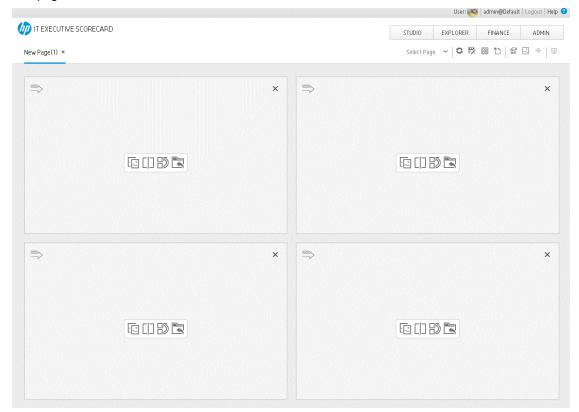
The horizontal layout displays the sections side-by-side.

4. The split icon is now horizontal. Click on the left side to split the column vertically into two sections.

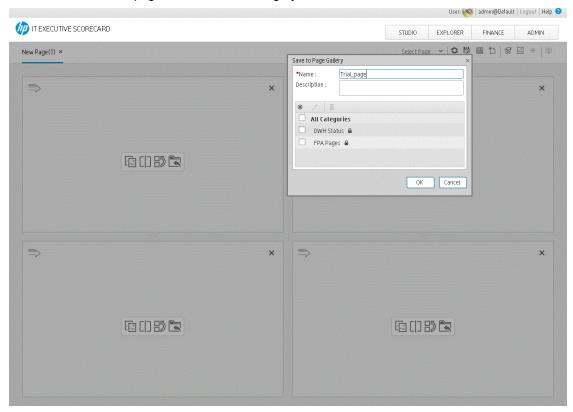


5. In the same way, click \_\_\_\_\_ to split the second column vertically into two vertical sections.

### The page now includes 4 sections:



6. Click to save the page.



### Enter the name of the page and select the category:

For more details, see Create a Dashboard Page and Add Components to the Page in the *IT Executive Scorecard Business Analyst Guide*.

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

- 7. Now, add components to the page layout you created.
- 8. Click the 'Add component' icon in one of the areas, or click the Component Gallery button in the top right menu bar to open the Components dialog box..
- 9. 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.
- 10. Select the component you want to add to one of the areas you created, and drag it to that area. Do the same for all the other areas.
  - For more details, see Component Gallery and Component Categories in the *IT Executive Scorecard Business Analyst Guide*.
- 11. For a Tab area, drag the components you wish to add and for each component a new tab will appear.
- 12. After adding the relevant components to the relevant areas, save the page by clicking the **Save** icon. Enter a page name, add a description, and decide under which category the page will be saved. If you do not select a category, the page is saved in the **Non Categorized** category.

# 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.

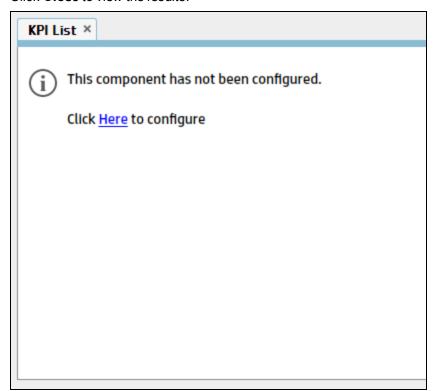
It is recommended that you plan in advance which components you want to place on your page and how they should be arranged, and then configure your page layout accordingly.

### Add a page to the Dashboard

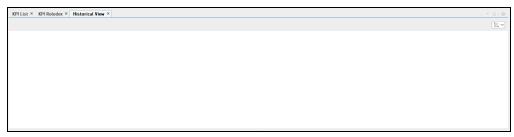
- 1. Add a page to the Dashboard, split it into two horizontal areas, and set the top area to tabs. For details, see "Page Layout and Components" on page 200.
- 2. You can now format the page.

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.

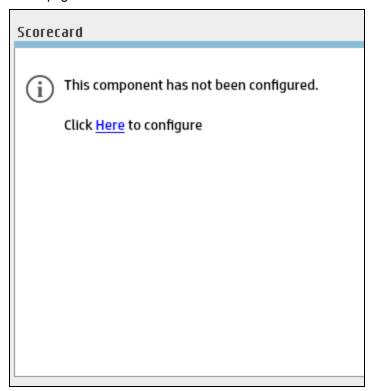


iii. Click the **Components** button and in the same way, add more tabbed components.



You can now select what you want to display in each component. For details, see the relevant component sections.

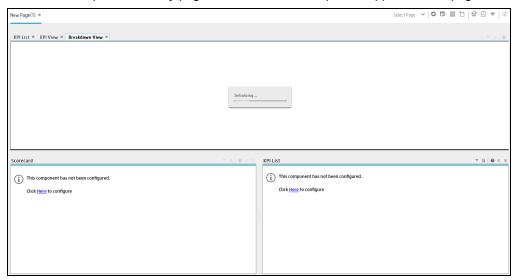
- b. In the lower section of the page, add the Scorecard Component to the Dashboard Page
  - i. Click the Component Gallery button.
  - ii. In the Component Gallery page that opens, click or double-click the Scorecard component to place it in the layout area, or select the component and drag it to an 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 366.

- 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.

# Use Case - Create a Dashboard Page and add a Scorecard Component to the Page

For details, see Use Case - Create a Dashboard Page and add a Scorecard Component to the Page in the *Getting Started with IT Executive Scorecard*.



### **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.

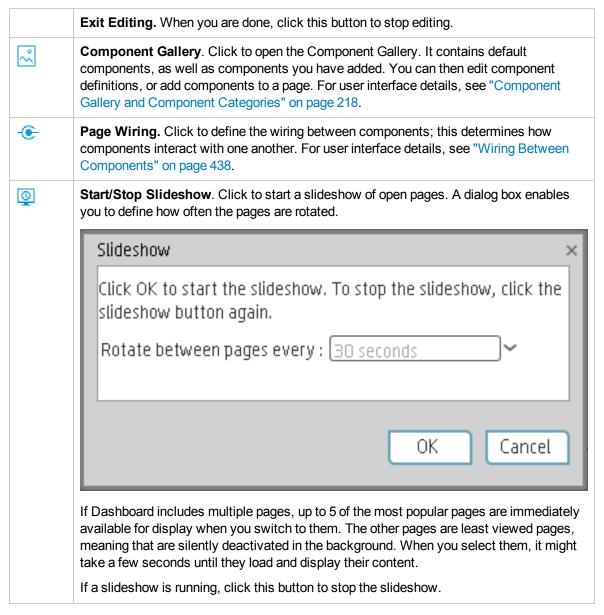


### **Page Management Toolbar**

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
Select Page	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.
C	Refresh. Click to refresh the page.
<b>&gt;</b>	<b>Save</b> or <b>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.
	Page Gallery. 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 "Page Gallery and Page Categories" on page 212.
*1	<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 "Dashboard Page" on page 195.
	<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 "Layout Tools" on the next page.



### **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	Remove Layout. Click (upper-right corner) to remove a layout from the page.

	Add Component. 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 "Component Gallery and Component Categories" on page 218.
пΠ	Split. 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).
	Split. 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>B</b>	<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.
Layout Icons:	
	<horizontal layout="">. 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.</horizontal>
	< Vertical layout>. 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.
	<tabbed layout="">. 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.</tabbed>

# Page Gallery and 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.

You can generate the URL of a Dashboard page to embed the page into another application. You can then click somewhere in that page to navigate away from the application towards the Dashboard page in Executive Scorecard.

#### To access:

In Dashboard, click Page Gallery.

Tasks

**UI Description** 



#### This section includes:

Modify Page Categories	212
Create a New Page Category	213
Rename a User-Defined Page Category	213
Delete a User-Defined Page Category	213
Assign a Page to a Category	213
Modify the Category Assignments of a Page	213
Embed an XS Dashboard page in another application	214
Navigate from an XS Dashboard page embedded into another application back to XS	214
Page Gallery Dialog Box	215

## 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 y 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).
- 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 loon) 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 large 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

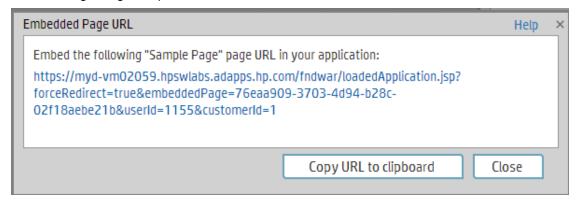
To change the category assignments of a page, right-click it and select the Categorize (page or component) option. In the Categorize Page dialog box that opens, modify the selection of categories, and click **OK**.

## Embed an XS Dashboard page in another application

You can generate the URL of a Dashboard page to embed the page into another application. You can then click somewhere in that page to open the Dashboard page in Executive Scorecard.

1. In the Dashboard, click Page Gallery. Select a page and click Generate URL to generate the URL of the page. You can then use the URL to embed the page into another application.

The following dialog box opens.



#### 2. You can then:

- Click **Copy URL to clipboard**. You can then use the copied URL to embed the selected XS Dashboard page into another application.
- Click the link in the dialog box to display the page and make sure it is the correct page.

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

# Navigate from an XS Dashboard page embedded into another application back to XS

You have embedded an XS Dashboard page in a non-XS application.

You can navigate from the XS Dashboard page embedded in the non-XS application back to XS, by clicking anywhere in that page.

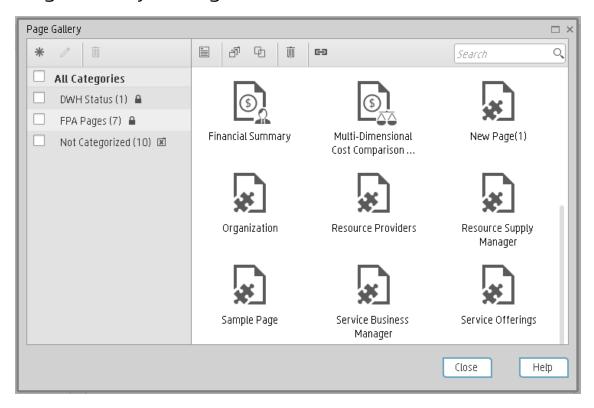
The Dashboard page opens in Executive Scorecard, in context, (with a login confirmation if you had left the session) in the XS application.

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

Access Movies in the Online Help.



# 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 "Component Gallery and Component Categories" on page 218.
0	<b>Edit Category Name.</b> Select a user-defined category and click to rename (default categories cannot be renamed).
Ū	<b>Delete Category.</b> Select a user-defined category and click to delete (default categories cannot be deleted).
Categories	This contains a list of categories to which pages are assigned. A category can have

the following indications after its name:

- A number following the category name shows how many pages are in the category.
- indicates that the category is a default category, and cannot be renamed or deleted.
- indicates that this category groups all the pages that are not assigned to a category.

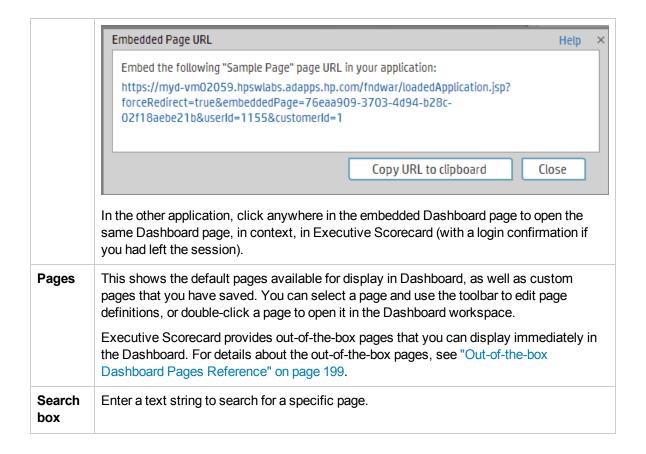
You can use the toolbar to manage a category, or select a category to display its pages on the right side of the dialog box.

Note that categories are not mutually exclusive; you can assign a page to more than one category.

### Pages (right side)

User interface elements are described below:

UI Element	Description
	Open Page. Select a page and click to open it in the Dashboard workspace.
	You can also double-click a page within the Page Gallery .
ð	Categorize Page. Select a page and click to assign it to a category.
Ф	<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.
	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.
<b>i</b>	<b>Delete Page.</b> Select a page and click to delete it from the gallery.
<b>6</b>	<b>Generate URL.</b> Select a page and click to generate the URL of the page. The URL can then be used to embed the page into another application. For details, see "Page Gallery and Page Categories" on page 212.
	The following dialog box opens. You can then:
	<ul> <li>Click Copy URL to clipboard. You can then use the copied URL to embed the selected XS Dashboard page into another application.</li> </ul>
	Click the link in the dialog box to display the page and make sure it is the correct page.



# Component Gallery and 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

### To access:

In the Executive Dashboard, click the **Component Gallery** button.



In a Dashboard page, click the Add component

**UI Description** Tasks



### This section includes:

Create a New Category	218
Rename a User-Defined Category	219
Delete a User-Defined Category	219
Assign a Component to a Category	219
Modify Category Assignments of a Component	219

# 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:

- 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 loon) 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 large) cannot be deleted.

# Assign a Component to a Category

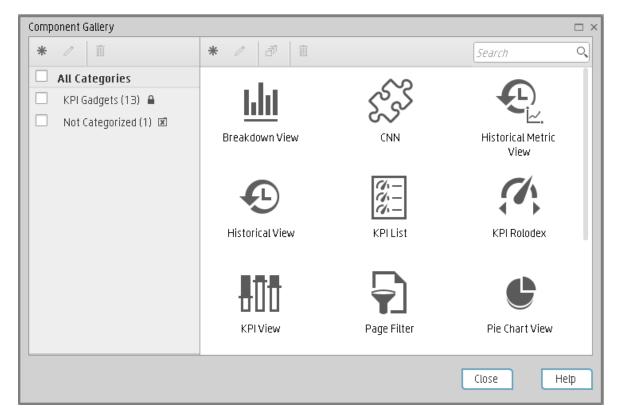
To assign a component to a category, select it and select the **Categorize** button in the toolbar (right side). In the Categorize Component dialog box that opens, select one or more categories to which you want to assign the page or component, and click **OK**.

# Modify Category Assignments of a Component

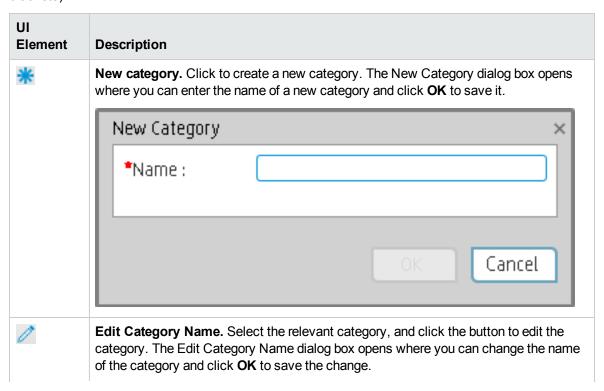
To change the category assignments of a component, select it and select the **Categorize** button in the toolbar (right side). In the Categorize Component dialog box that opens, modify the selection of categories, and click **OK**.

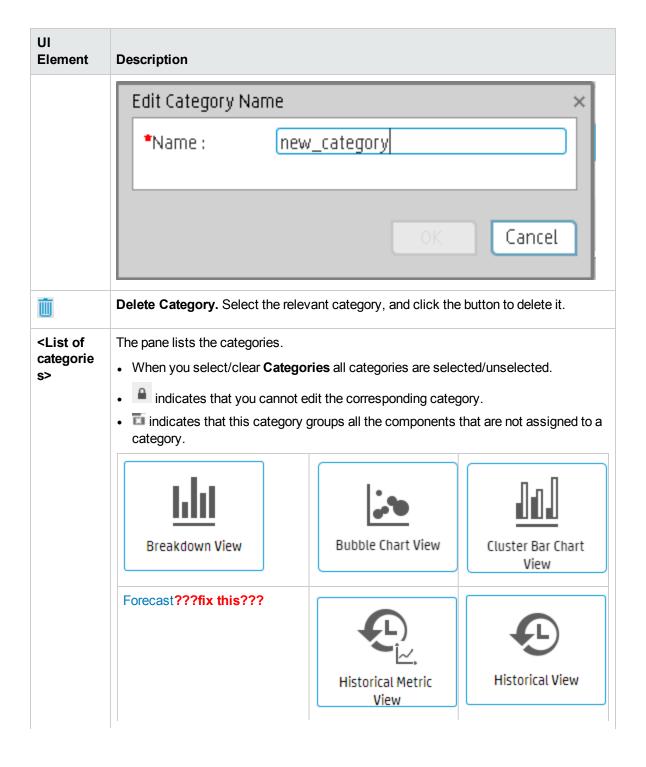


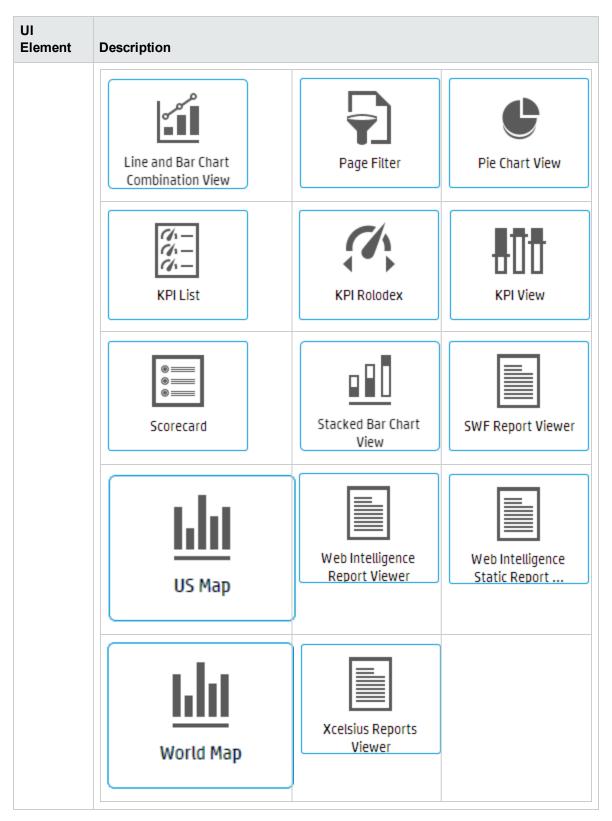
**Component Gallery Dialog Box** 



### **Left Pane**







**Right Pane** 

# brackets):

UI Element	Description
*	<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 "Customized Static or Dynamic URL Component" on page 430.
0	<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 "Customized Static or Dynamic URL Component" on page 430.
<b>i</b>	<b>Delete Component.</b> Select the relevant component, and click the button to delete it.
<b>₽</b>	Categorize Component. 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.  Categorize Component: CNN All Categories  KPI Gadgets  OK Cancel
Search	Enter a string to display all the components whose name includes the string.
Component	The dialog box displays a list of the available default and customized components.

# Change, On-the-fly, the Component Display Format

In some Dashboard page components, you can select to change on-the-fly the format of the display.

### To access:

In the relevant component, click and select the relevant format to modify the display on-the-fly.





# Components where you can modify the display format, on-the-fly

In the following components, the icon indicates that you can modify the display format, on-the-fly. The components are:

- KPI Rolodex Component
- The Breakdown View Component
- The Bubble Chart View Component
- The Cluster Bar Chart View Component
- The Line and Bar Chart View Component
- The Historical Metric View Component
- The Historical View Component
- The KPI List Component
- The KPI View Component
- The Pie Chart Component
- The Stacked Bar Chart View Component

# **Available display formats**

Some of the formats are not available for some of the components.

To display the contents of the component using the enriched vertical column format. For details, see "Change, On-the-fly, the Component Display Format" above.

To display the contents of the component using the horizontal Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" above.

To display the content using the multiple line format. For details, see "Change, On-the-fly, the Component Display Format" above.

40	To display the content using the pie format. For details, see "Pie format" on page 236.
ш	To display the content using the bar format. For details, see "Bar format" on page 235
mT	To display the content using the horizontal enriched column format. For details, see "Change, On-the-fly, the Component Display Format" on the previous page.
÷	To display the content using the vertical Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on the previous page.
~	To display the content using the single line graph format. For details, see "Change, On-the-fly, the Component Display Format" on the previous page.
71	To display the content using the cluster bar format. For details, see "Cluster Bar format" on page 237.
<u> </u>	To display the content using the stacked bar format. For details, see "Stacked Bar format" on page 239.
ជាំ	To display the content using the bar and line format. For details, see "Change, On-the-fly, the Component Display Format" on the previous page.
.%	To display the content using the bubble chart format. For details, see "Bubble Chart format" on page 243.
	To display the content using the list format. For details, see "List format" on page 246.

# Note:

Selected KPIs and Metrics have:	Selected Format:	Automatically Changed to Format:
Different periodicity	Bar and Line Combination	Multiple Line
Different periodicity or different units	Cluster Bar or Stacked Bar	Multiple Line
Different periodicity or different units	Bubble, Bar, or Pie	Vertical Column
More than 15 selected (not Breakdowns)	Bar	Vertical Column
More than 15 selected (not Breakdowns)	Stacked Bar, Cluster Bar, or Bar and Line Combination	Multiple Line



# Change On-the-fly the Component Display Format

To change, on-the-fly, the component display format:

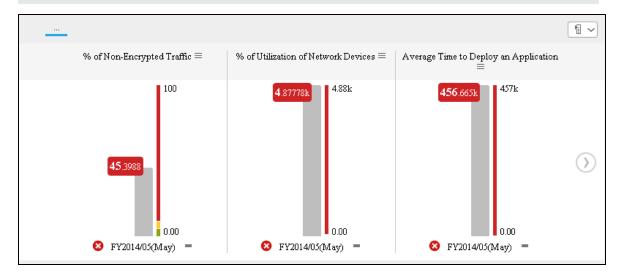
- 1. Click the icon in the one of the relevant components and select the relevant format some of the formats are not available for some of the components. For a list of the possible formats, see the table of formats in the "UI Description" below.
- 2. The display is automatically modified.

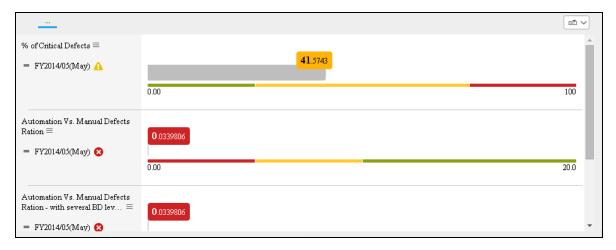


# Column format

The graphs display the data horizontally or vertically depending on your format selection.

**Note:** Drilling down to Breakdowns lists a maximum of 14 Breakdowns.





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

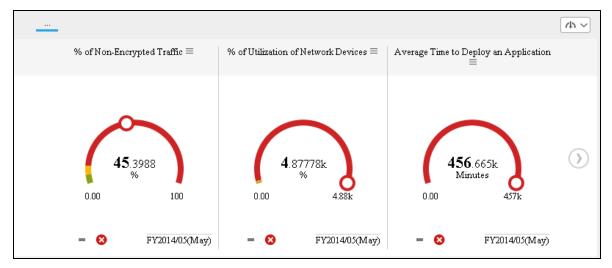
# **UI Element** Description <Columns> The column displays for each item: Manual KPI ≡ • The title (above the column for vertical layout or to the left of the column for a horizontal layout) is the name of the item. Double-click the title to open the EXPLORER tab filtered for the selected item. 200% 200% • $\equiv$ (or $\stackrel{*=}{=}$ when a new annotation has been added to the item). Move the cursor above the icon to display the item tooltip that provides detailed information about the item and access to the Explorer in the context of the item. For details, see "First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 464. • The value (at the top of the colored column for vertical layout or to the right of the column for a horizontal layout) represent the highest threshold value. • The value (at the bottom of the colored column for vertical layout or to the left of the column for a horizontal layout) represent the lowest -100% threshold value. FY2013/09(Sep) • The colors of the thin column represent the thresholds defined for the • The value with unit in a color block on the gray column shows the item value. The color of the block shows the item status. • The text (at the bottom of the column for vertical layout or under the item name on the left of the column for a horizontal layout) indicates the display period of the item. • The icon to the left of the display period indicates the trend calculated over the display period. • The icon to the left of the display period indicates the status of the item during the display period:

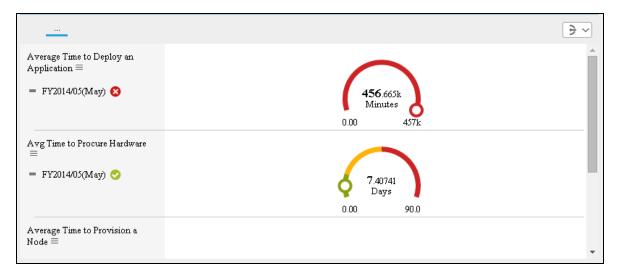
UI Element	Description
	• Vindicates that the status is Good.
	Aindicates that the status is Warning.
	indicates that the status is Error.
	indicates that the status was not calculated or that there was en error in the calculation.
<b>()</b> ()	Use the arrows to scroll between the "pages" of horizontal columns.  The width of the "page" or the number of columns 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.

# Rolodex - Gauge format

Note: Drilling down to Breakdowns lists a maximum of 14 Breakdowns.

The graphs display the data horizontally  $\Delta$  or vertically  $\stackrel{\triangleright}{=}$  depending on your format selection.





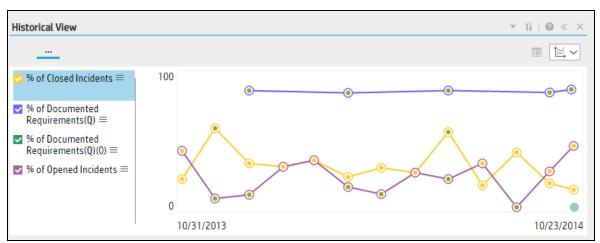
The component displays a gauge for each selected KPI. The order of the gauges in the component, correspond to the order of the KPIs in the Selected KPIs area in the filter dialog box.

UI Element	Description
<component< td=""><td>The component displays the following information:</td></component<>	The component displays the following information:
contents>	The name of the KPI above the gauge or on the left of the gauge. Double-click the name to open the EXPLORER tab filtered for the selected element.
	• (or *= when a new annotation has been added to the item). Move the cursor above the icon to display the item tooltip that provides detailed information about the item and access to the Explorer in the context of the item. For details, see "First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 464.
	• 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.
	The colors of the small bars represent the thresholds defined for the KPI.
	The circle indicates the KPI value.
	The text at the bottom of the gauge indicates the display period of the KPI.
	The icon to the left of the display period indicates the trend calculated over the display period.
	The icon to the left of the display period indicates the status of the KPI during the display period:
	• oindicates that the status is Good.
	Aindicates that the status is <b>Warning</b> .

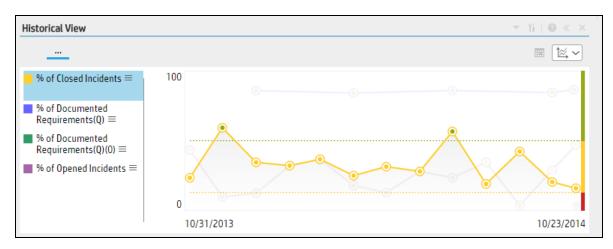
UI Element	Description
	<ul> <li>indicates that the status is Error.</li> <li>indicates that status was not calculated or that there was en error in the calculation.</li> </ul>
	is shown at the bottom of the gauge when there is no calculated data for the selected item for the selected period. This can be due to an incorrect formula (for example: division by zero), an arithmetic error due to missing data, or other reasons.
	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 the top of the page.
<tooltip></tooltip>	Move the mouse over the name of a KPI to display a tooltip that include additional information about the KPI. For details, see "First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 464.
<b>()</b> ((	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.

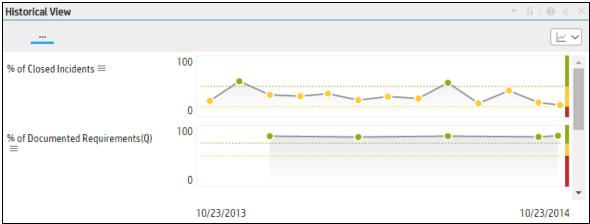
# Multiple or single line format

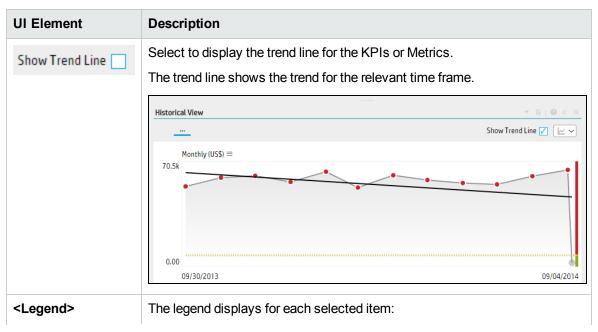
The graphs display the data using multiple lines in a single graph (KPI units permitting) or in a group of one line graphs depending on the format you selected.



**Note:** Drilling down to Breakdowns lists a maximum of 14 Breakdowns.







UI Element	Description
	<ul> <li>The color used to represent the item in the graph.</li> <li>The name of the item. Click the item name to hide or display the relevant graph line.</li> </ul>
	Indicates that this item does not have an annotation.
*=	Indicates that this item has an annotation.
	When you move the mouse over such a point, a tooltip displays the annotation information related to the point. For details, see "First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 464.
	Number of Used Instances  Owner not defined  11/16/2013
	Explore
	The tooltip displays a maximum of three annotations. If there are more than 3 annotations, the first 2 are displayed followed by <b>Explore</b> Click <b>Explore</b> open the EXPLORER tab in context, to view the whole list of annotations. For details, see "Explorer" on page 474.  Double-click the icon to open the EXPLORER tab filtered for the selected element.
-⊙-	Indicates a point corresponding to a division of the time period selected for the report.  The point has the color of the status (green: OK, yellow: warning, and red:critical).

UI Element	Description
	Double-click the "point" to display the item 's detailed information in the EXPLORER tab up to the period of time defined by the "point" with the time range corresponding to the item range definition selected in the EXPLORER tab. For details, see "Explorer" on page 474.
	<b>Note:</b> Click the line in the graph to display a vertical line that provides information about the value of the item.
<threshold></threshold>	The thresholds of the item are displayed on the right of the component.
	For charts that display a single item, the threshold bar and the dotted line appear by default.  For charts that display more than one item, select an item 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.
	Historical View • n F Ø e ×
	Project Scope Changes Backlog   210
	Proposals Backlog ≡ 180
	% of Project Effort Done by External Resources   0
	% of Rejected Defects ≡ 100  9/10/2012 9/10/2013
<y-axis></y-axis>	The Y-axis displays the values of the item in the relevant unit and when you
	selected one chart ( ) when configuring the component:
	When the items have the same unit:
	The Y-axis is displayed when all the selected items have the same unit.

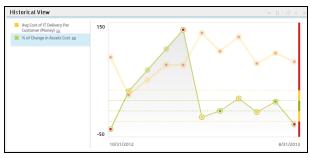
# Historical View | % of Project Effort Done by External Resources == | 100 | | % of Time Invested on Strategic Projects == | % of Tests Resulting in Defects ==

### . When the items do not have the same unit:

The Y-axis is not displayed when the selected items have different units.



You can display the Y-axis, by selecting an item in the legend. In that case, the Y-axis corresponding to the selected item and the thresholds are displayed in the component will appear together with the thresholds.

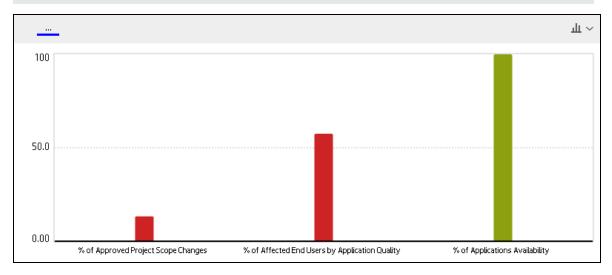


UI Element	Description
<x-axis></x-axis>	The X-axis displays the time frame selected for the report, split into equal segments, depending on the Display Period. For details, see "Change, Onthe-fly, the Component Display Format" on page 224.

# Bar format

### Limitation:

- You can only display a maximum of 15 KPIs.
- Drilling down to Breakdowns lists a maximum of 14 Breakdowns. If there are more than 14
  Breakdowns, an additional **Other** bar is displayed and represents the sum of all the other
  Breakdowns.
- The selected KPIs should have the same units and periodicity.



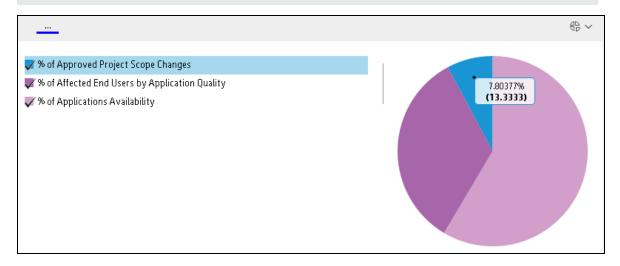
The component displays a bar for each selected item . The order of the bars in the component, correspond to the order of the selected items in the filter dialog box.

UI Element	Description
<component contents=""></component>	The component displays the following information:  • The name of the item below the bar.
	<ul> <li>The height of the bar corresponds to the value of the item.</li> <li>The color of the bar indicates the threshold range of the value of the item.</li> </ul>
<tooltip></tooltip>	Move the mouse over a bar to display a tooltip that include the value of the item and the name of the item.

# Pie format

# Limitation:

- The selected KPIs should have the same units and periodicity.
- Drilling down to Breakdowns lists a maximum of 14 Breakdowns. If there are more than 14
  Breakdowns, an additional "Other" slice is displayed and represents the sum of all the other
  Breakdowns.



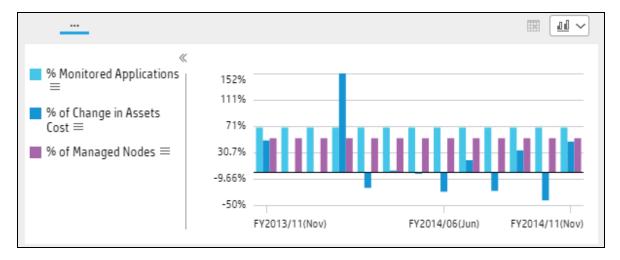
UI Element	Description
<pie graph&gt;</pie 	The pie graph displays slices that represent the selected items and show tooltips that display the value of the item and the percentage of the pie.
	If you have added any component (except for a Pie component or a KPI List component) to a Dashboard page, and have selected the Pie format, the component can display up to 15 Breakdowns.
	Click the relevant slice to display a list of the available Breakdown dimensions. When you select a Breakdown dimension, the 討의 icon is displayed.
	Use the ₱ icon to display the 15 slices with the highest or lowest values of the selected Breakdown dimension.
	If you have added a Pie component to a Dashboard page and:
	<ul> <li>If you have selected Breakdown Selection, and depending on the number of slices you have selected, you can view one of the following:</li> </ul>
	<ul> <li>Each value of the KPI or Metric Breakdown dimension is represented by a slice of the pie.</li> </ul>
	o One or more slices represent the highest values of the KPI or Metric

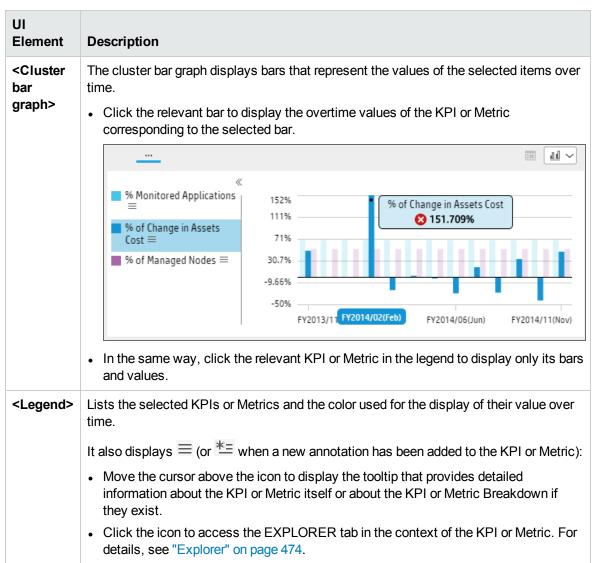
UI Element	Description
	Breakdown dimension, and one of the slices represents all the other values of the KPI or Metric Breakdown dimension.
	<ul> <li>If you have selected Multi-Selection, and depending on the number of slices you have selected, you can view one of the following:</li> </ul>
	<ul> <li>Each selected item is represented by a slice in the pie.</li> </ul>
	<ul> <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>
<legend></legend>	Lists one of the following:
	If you have selected Breakdown Selection:
	<ul> <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> </ul>
	(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 "First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 464.
	If you have selected Multi-Selection:
	<ul> <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> </ul>
	• (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 "First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 464.
<tooltip></tooltip>	Move the mouse over the pie slices to display a tooltip that include detailed information about the selected item.
>> or <<	Click to display the legend or to hide the legend.

# Cluster Bar format

# Limitation:

- The selected KPIs or Metrics should have the same units and periodicity.
- This format can only display the overtime data of up to 15 KPIs or Metrics.



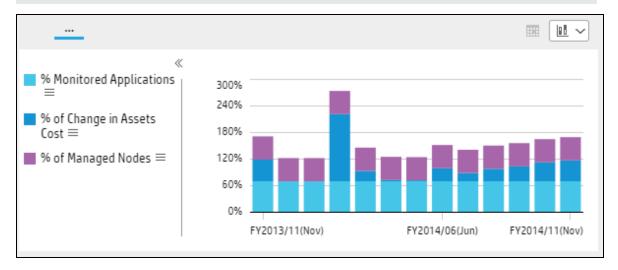


UI Element	Description
	For details, see "First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 464.
<tooltip></tooltip>	Tooltips display the value of the KPI or Metric for the selected time frame (see above graph for an example).
>> or <<	Click to display the legend or to hide the legend.

# Stacked Bar format

# Limitation:

- The selected KPIs or Metrics should have the same units and periodicity.
- This format can only display the overtime data of up to 15 KPIs or Metrics.



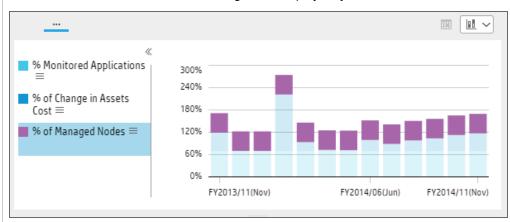
UI Element	Description
<cluster bar<="" th=""><th>The stacked bar graph displays bars that represent the absolute values of the selected items over time.</th></cluster>	The stacked bar graph displays bars that represent the absolute values of the selected items over time.
graph>	Hover over the relevant section of the bar to display the overtime values of the KPI or Metric corresponding to the selected section.

### UI Element Description ■ Ш ~ % Monitored Applications 300% 240% % of Change in Assets 180% Cost $\equiv$ % of Managed Nodes ■ % of Managed Nodes = 120% 52.459% 60% 0% FY2014/04(Apr) 4/06(Jun) FY2013/11(Nov) FY2014/11(Nov)

# <Legend>

Lists the selected KPIs or Metrics and the color used for the display of their value over time.

Click the relevant KPI or Metric in the legend to display only its bars and values:



Click the breadcrumbs blue line to automatically reselect all the items in the legend.

The legend also displays  $\equiv$  (or  $\stackrel{*=}{=}$  when a new annotation has been added to the KPI or Metric):

- Move the cursor above the icon to display the tooltip that provides detailed information about the KPI or Metric itself or about the KPI or Metric Breakdown if they exist.
- Click the icon to access the EXPLORER tab in the context of the KPI or Metric. For details, see "Explorer" on page 474.

For details, see "First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 464.

### <Tooltip>

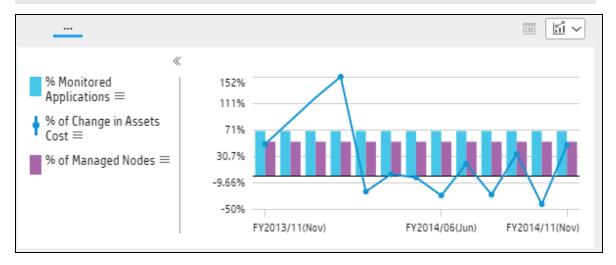
Tooltips display the value of the KPI or Metric for the selected time frame (see above graph for an example). The tooltip displays the value of the KPI or Metric (not the absolute value).

UI Element	Description
>> or <<	Click to display the legend or to hide the legend.

# Bar and Line Combination format

### Limitation:

- The selected KPIs or Metrics should have the same periodicity.
- This format can only display the overtime data of up to 15 KPIs or Metrics.



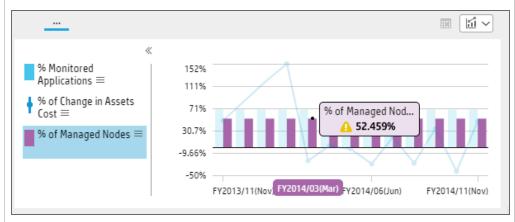
UI Element	Description
Bar and line graph>	The Bar and Line Combination graph displays bars and lines that represent the values of the selected items over time.
	When you select the KPIs or Metrics you want to display, the Bar and Line Combination graph displays the first KPI or Metric in the selection alternatively with bars or a line.
	Click the relevant bar or line to display the overtime values of the KPI or Metric corresponding to the selected bar or line.

### UI Element Description **■ 111** ∨ % Monitored 152% Applications ≡ 111% % of Change in Assets % Monitored Appli... $Cost \equiv$ **68.75%** 30.7% % of Managed Nodes $\equiv$ % of Change in Ass -9.66% <u>\_\_\_\_\_-23.6146%</u> -50% FY2013/11(Nov) FY2014/03(Mar) FY2014/06(Jun) FY2014/11(Nov)

# <Legend>

Lists the selected KPIs or Metrics and the color used for the display of their value over time.

Click the relevant KPI or Metric in the legend to display only its bars or line and values.



Click the breadcrumbs blue line to automatically reselect all the items in the legend.

Click the or the in the legend to toggle between the bar format and the line format. The selection is persistent.

When you have selected only two KPIs or Metrics, the Y-axis is displayed to the left and to the right of the graph. There is no legend. You can toggle between bar and line format for one of the selected KPI or Metric. The other KPI or Metric display format is automatically changed to the other format. Click again the format icon to switch formats.

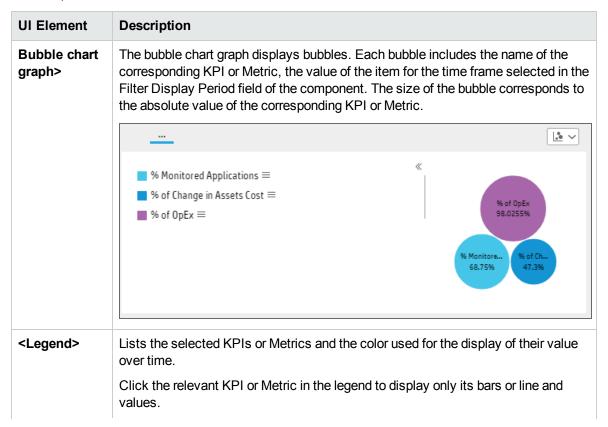
UI Element	Description
Element	Description    152%
	Click the icon to access the EXPLORER tab in the context of the KPI or Metric. For details, see "Explorer" on page 474.
	For details, see "First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 464.
<tooltip></tooltip>	Tooltips display the value of the KPI or Metric for the selected time frame (see above graph for an example).
>> OL <<	Click to display the legend or to hide the legend.

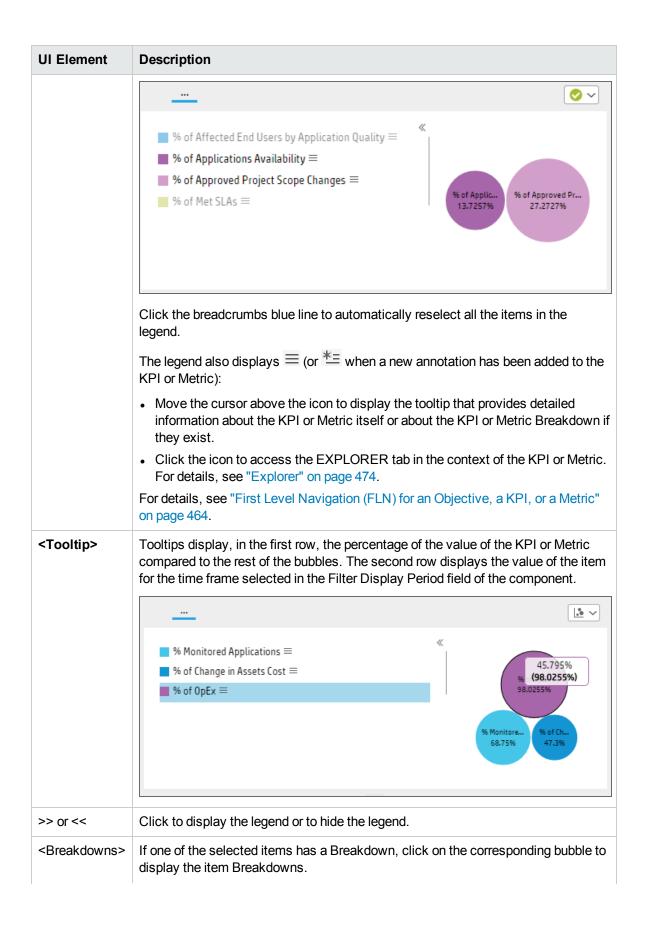
# **Bubble Chart format**

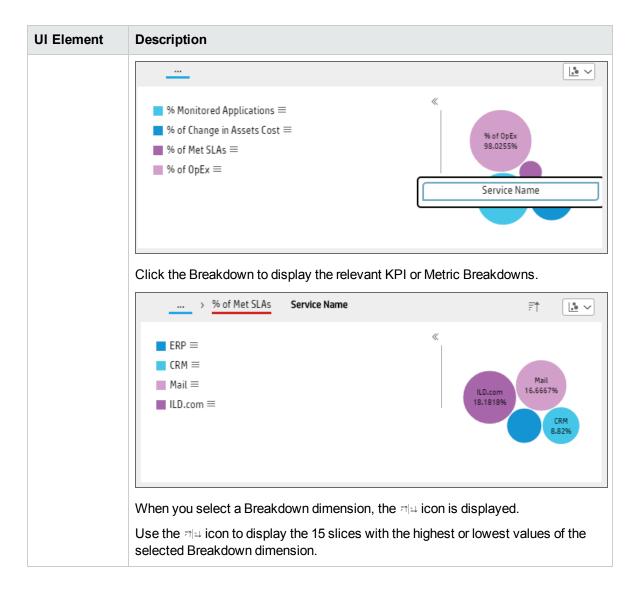
### Limitation:

- The selected KPIs or Metrics should have the same units and periodicity.
- This format can only display the overtime data of up to 15 KPIs or Metrics.
- Drilling down to Breakdowns lists a maximum of 14 Breakdowns. If there are more than 14
  Breakdowns, an additional "Other" slice is displayed and represents the sum of all the other
  Breakdowns.





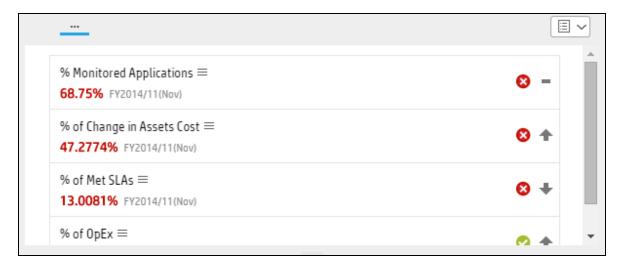




# List format

# Limitation:

- The selected KPIs or Metrics should have the same periodicity.
- This format can only display the overtime data of up to 15 KPIs or Metrics.



UI Element	Description
List graph>	<ul> <li>The list graph displays each selected KPI or Metric in a list. The row includes:</li> <li>The name of the KPI or Metric.</li> <li>The value of the KPI or Metrics for the time period selected in the Display Period of the component filter.</li> <li>The time stamp for the beginning of the display period.</li> <li>The status of the KPI (or the No Data icon for a Metric).</li> <li>The trend of the KPI (or a flat trend for a Metric).</li> </ul>

# Change, On-the-fly, the Periodicity Used in a Component Display

In some Dashboard page components, you can change locally the periodicity used in the component display.

### To access:

In the relevant component, click and select the relevant periodicity to modify the display on-the-fly.

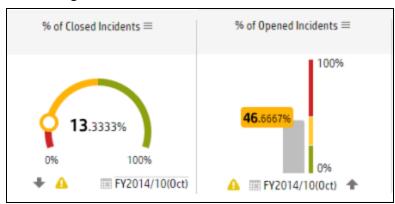
In the following components and only for the gauge, bar, or multi-line format, the icon indicates that you can select a different periodicity to display the data. The components are:

- KPI Rolodex Component
- The Breakdown View Component
- The Bubble Chart View Component
- The Cluster Bar Chart View Component
- The Line and Bar Chart View Component
- The Historical Metric View Component
- The Historical View Component
- The KPI List Component
- The KPI View Component
- The Pie Chart Component
- The Stacked Bar Chart View Component
- 1. Click the icon in the relevant component.

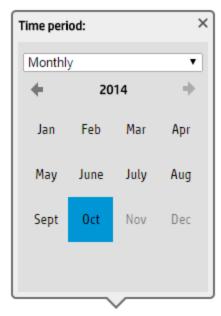
Note: After activating the on-demand periodicity:

- The component does not show the <sup>\*=</sup> or ≡ FLN icon because the calculation is temporary, except for KPIs or Metrics for which the selected on-demand periodicity corresponds to their default periodicity.
- To restore the original display, click the Breadcrumbs blue line when available or in multiline format, slide the button to the **Default** position in the on-demand periodicity slider.
- When you click a gauge or a line (in a multi-line format) for a KPI or Metric with Breakdowns, their values are displayed for the selected on-demand periodicity. Click the Breadcrumbs blue line to restore the original display.
- The calculations are performed on-demand and are temporary. When you leave the page and return to it, the original display is restored.

# 2. In the Gauge or Bar format:



a. Click the icon at the bottom of the graph to display the on-demand periodicity calendar:



b. Select the time period in the dropdown list:

### Current

The KPI or Metric is recalculated (temporarily) for the current period corresponding to the periodicity defined for the KPI or Metric.

For example, if the KPI periodicity is monthly, the recalculation is performed for the current month up to the current day; if the KPI periodicity is weekly, the recalculation is performed for the current week up to the current day.

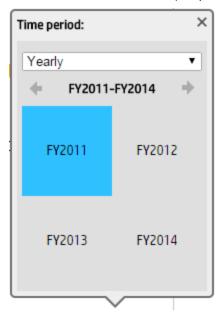
### Last Closed

The KPI or Metric is recalculated (temporarily) for the closed period preceding the current period, corresponding to the periodicity defined for the KPI or Metric.

For example, if the KPI periodicity is monthly, the recalculation is performed for the previous month; if the KPI periodicity is weekly, the recalculation is performed for the previous week.

# Yearly

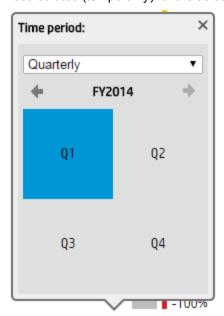
Select the required year in the KPI or Metric list of years. Future years are disabled. The KPI or Metric is recalculated (temporarily) for that year.



**Note:** When the KPI or Metric default periodicity is yearly, the yearly calendar is automatically displayed.

### Quarterly

Select the required quarter in the calendar. Future years are disabled. The KPI or Metric is recalculated (temporarily) for the selected quarter.

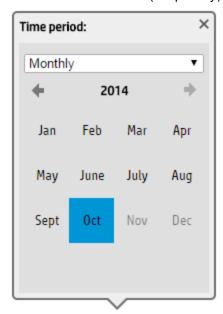


Note: When the KPI or Metric default periodicity is quarterly, the quarterly calendar is

automatically displayed.

# Monthly

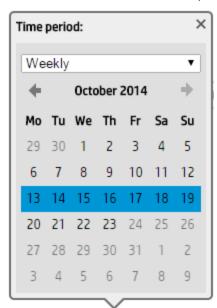
Select the required month in the calendar. Future months, and years are disabled. The KPI or Metric is recalculated (temporarily) for the selected month.



**Note:** When the KPI or Metric default periodicity is monthly, the monthly calendar is automatically displayed.

# Weekly

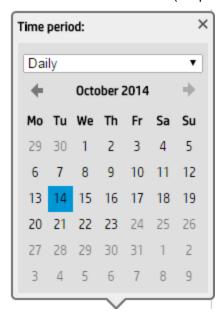
Select the required week in the calendar. Future weeks, months, and years are disabled. The KPI or Metric is recalculated (temporarily) for the selected week.



**Note:** When the KPI or Metric default periodicity is weekly, the weekly calendar is automatically displayed.

### Daily

Select the required day in the calendar. Future days, months, and years are disabled. The KPI or Metric is recalculated (temporarily) for the selected day.



**Note:** When the KPI or Metric default periodicity is daily, the daily calendar is automatically displayed.

c. The display is automatically and locally modified.

### 3. In a multi-line format.

a. Click the icon at the top right-corner of the graph to display the on-demand periodicity slider:



Slide the button to the relevant periodicity to temporarily recalculate the selected (checked) KPIs or Metrics displayed in the component. When you select the KPIs or Metrics that you had not selected for the on-demand periodicity, their default periodicity is restored and the calculated results are redisplayed.

To restore the original display, do one of the following:

 Slide the button back to the **Original** position that represents the default periodicity of the KPIs or Metrics displayed in the graph.

- o Click the blue line in the breadcrumbs.
- b. The display is automatically modified.

# 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.

#### To access:

You can view the report in the relevant page in the Dashboard.





**Tip:** 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**

**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 to other components

The Breakdown View component is automatically wired to:

- The KPI View component. For details, see"The KPI View Component" on page 327.
- The Historical View component. For details, see "The Historical View Component" on page 298.
- The KPI Rolodex component. For details, see"KPI Rolodex Component" on page 317.

#### Wiring

**Wiring.** Wiring is between components. It does not depend on the component internal format. For details, see "Wiring Between Components" on page 438.

If you drill down (to Breakdowns) in a specific component that is wired to another component on the same page, and you click the triggering component, the component with the Breakdowns is restored to its top level and filtered according to the triggering component.

The Historical View component is automatically wired to the Breakdown View component and to the Forecast component. For details, see "The Breakdown View Component" above and "The Forecast Component" on page 282.



Main task: "Dashboard Display" on page 190

## This section includes the following tasks:

•	Point to the named instance when Executive Scorecard is installed on an SQL Server named	
in	stance	255
•	Display a KPI Breakdown Values	255
•	Display the Breakdown Values of a KPI Breakdown	256

# 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.
- 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:

- Prerequisite: Make sure that the KPI has the relevant KPI Breakdowns. For details, see "KPI Breakdowns" on page 166.
- 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).
- Add the Breakdown View component to the page. For details, see "Page Layout and Components" on page 200
- 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.
- 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 "The Breakdown View Component" on the previous page.
  - The component displays the required information.
- 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:

- 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 166.
- 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).
- Add the Breakdown View component to the page. For details, see "Page Layout and Components" on page 200.
- 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 347
- 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 327
- 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 "The Breakdown View Component" on
  page 254.

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.

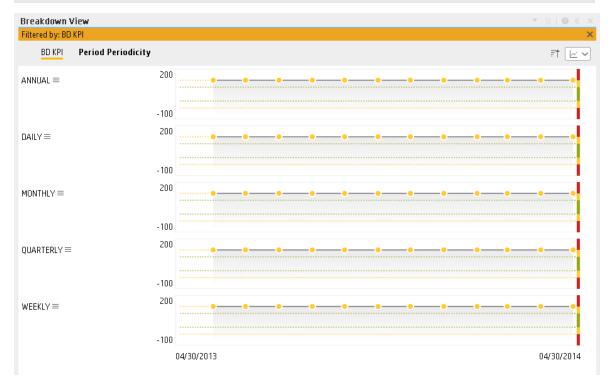


## **Breakdown View Component**

## 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. You cannot configure the Breakdown View component.
- **Note:** 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.



## **Component Toolbar**

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description		
lacktriangle	Component Menu. Opens a menu where you can select:		
	Preferences  Preferences. Depending on the		
	component you are current configuring, opens the <b><component_name></component_name> 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> .		
	• Wiring. Depending on the		
	component you are currently configuring, opens the Wiring dialog box where you can wire the current component to other components. For		

UI Element	Description		
	details, see "Wiring Between Componer	nts" on page 438.	
	• Refresh  The button is disabled in the Page Filter	Refresh. Refreshes the display. ter component.	
	• Open in a New Window the component in a new window.	Open in a New Window. Opens	
YI.	Configure Component. Opens the Configure levant component. For details, see the re	•	
	Note:		
	<ul> <li>The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.</li> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.</li> </ul>		
	Note: You can also click here in Click He of the component	ere to configure it in the center	
0	Opens the online documentation page relevent currently configuring.	rant to the component you are	
<b>*</b>	Collapse component. Collapses the com	ponent.	
	To expand the collapsed component, click component.	the <sup>W</sup> button on the collapsed	
	Drag the Resize handle to enlarge or reduce the component.	e horizontally the area occupied by	
×	Remove Component. Removes the comp	ponent from the page.	

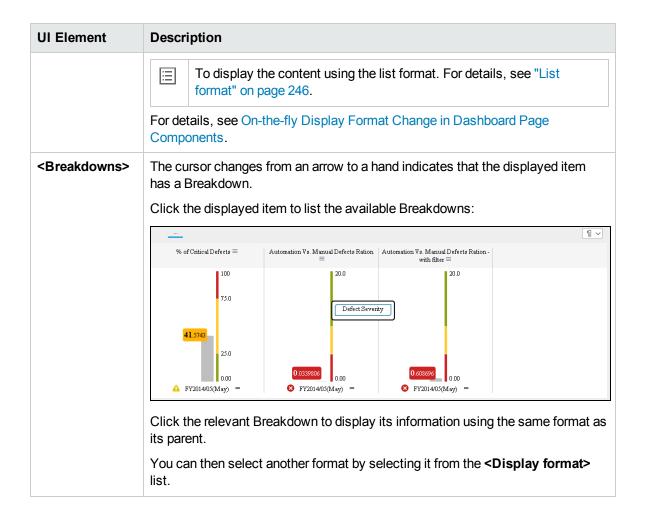
## **Component Contents**

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

**Note:** Some of the graphs below display thresholds. When the selected item is a Metric (that does not have thresholds), the graph displays the data without the threshold element.

UI Element	Description
<breadcrumbs></breadcrumbs>	When you have selected a Breakdown (see below for more details), the breadcrumb displays the level of the displayed element:
	> Automation Vs. Man Defect Severity
	Click the relevant item in the breadcrumb list to go back to a previous level.
	Enables the on-demand periodicity temporary recalculation and display.
	The icon appears only for gauge, bar, or multi-line formats, and only in the following components:
	KPI Rolodex Component
	The Breakdown View Component
	The Bubble Chart View Component
	The Cluster Bar Chart View Component
	The Line and Bar Chart View Component
	The Historical Metric View Component
	The Historical View Component
	The KPI List Component
	The KPI View Component
	The Pie Chart Component
	The Stacked Bar Chart View Component
	For details, see On-demand Periodicity in Component Display.
<display< th=""><th>You can modify the format of the display of some of the components on the fly,</th></display<>	You can modify the format of the display of some of the components on the fly,
format>	by selecting the relevant format. Some of the formats are not applicable to some of the components.
	The components for which you can modify the display format on-the-fly are:
	KPI Rolodex Component
	The Breakdown View Component
	The Bubble Chart View Component
	The Cluster Bar Chart View Component
	The Line and Bar Chart View Component
	The Historical Metric View Component

UI Element	I Element Description	
	The Historical View Component	
	The KPI List Component	
	The KPI View Component	
	The Pie Chart Component	
	The Stacked Bar Chart View Component	
	ne formats you can select are:	
	To display the contents of the component using the enriched vertical column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	To display the contents of the component using the horizontal Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	To display the content using the multiple line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	To display the content using the pie format. For details, see "Pie format" on page 236.	
	To display the content using the bar format. For details, see "Bar format" on page 235	
	To display the content using the horizontal enriched column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	To display the content using the vertical Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	To display the content using the single line graph format. For details, see "Change, On-the-fly, the Component Display Format" on page 224	
	To display the content using the cluster bar format. For details, see "Cluster Bar format" on page 237.	
	To display the content using the stacked bar format. For details, see "Stacked Bar format" on page 239.	
	To display the content using the bar and line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	To display the content using the bubble chart format. For details, see "Bubble Chart format" on page 243.	



# The Bubble Chart View Component

The Bubble Chart View component displays the list of selected KPIs or Metrics, and their value, trend, and status for the measurement period in bubble chart format, by default.

#### 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.





- 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.



Main task: "Dashboard Display" on page 190

# 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.
- 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 Gallery and Component Categories" on page 218.
- 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 200.



#### **Bubble Chart View Component**



## Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	ent Description		
▽	Component Menu. Opens a menu where you can select:		
	Preferences	Preferences. Depending on the	
	component you are current configuring, or <b>Preferences</b> dialog box where you can or in the page by changing the name in the	opens the <b><component_name></component_name></b> change the name of the component	
	◆ Wiring	Wiring. Depending on the	
	component you are currently configuring where you can wire the current componed details, see "Wiring Between Componer"	, opens the Wiring dialog box ent to other components. For	
	Refresh	Refresh. Refreshes the display.	
	The button is disabled in the Page Filter		
	• Open in a New Window	Open in a New Window. Opens	
	the component in a new window.		
AT	<b>Configure Component.</b> Opens the Configure relevant component. For details, see the relevant component.		
	Note:  • The button is disabled in the Breakdow component is filtered by the relevant at on the same Dashboard page. When y wired KPI View, Historical View, or Ro Breakdown View component displays KPI Breakdown for the selected KPI.	utomatically wired components ou select an item in one of these blodex components, the	
	The button is disabled in the Forecast of filtered by the relevant automatically we Dashboard page. When you select an Historical View, the Forecast component the selected KPI.	rired components on the same item in one of these wired	
	Note: You can also click here in Click He of the component	ere to configure it in the center	
0	Opens the online documentation page relev currently configuring.	ant to the component you are	
*	Collapse component. Collapses the com	ponent.	

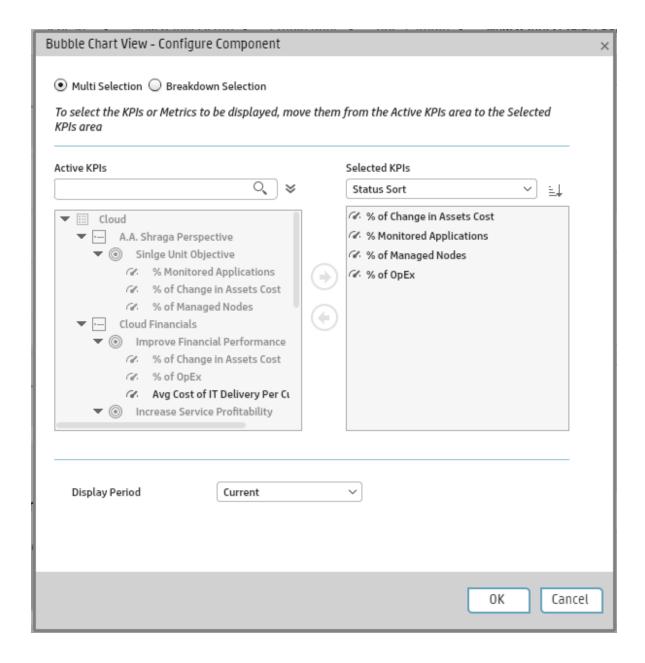
UI Element	Description
	To expand the collapsed component, click the <sup>™</sup> button on the collapsed component.
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

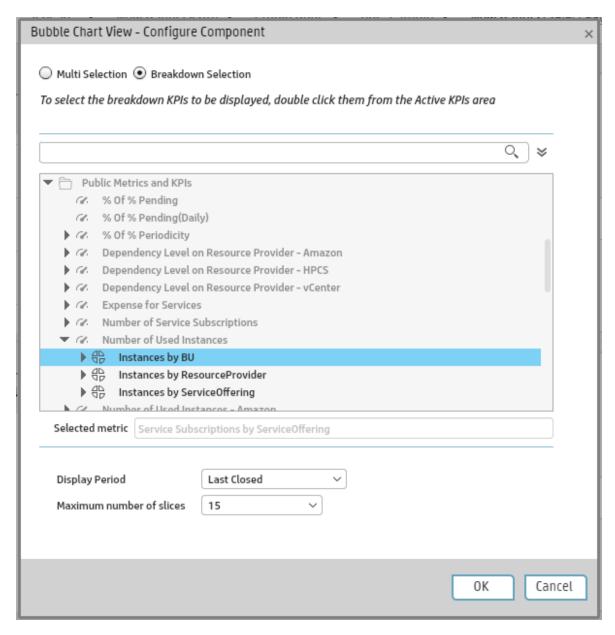
## <Component Contents>

UI Element	Description	
<display format=""></display>	fault, the component displays details about the selected KPIs or Metrics in e bar format. For details, see "Bubble Chart format" on page 243.	
(A) V		an also modify the format of the display of the component on the fly, by ing the relevant format. Some of the formats might not be applicable.
	The fo	rmats you can select are:
		To display the contents of the component using the enriched vertical column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	(h)	To display the contents of the component using the horizontal Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	₺	To display the content using the multiple line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	95	To display the content using the pie format. For details, see "Pie format" on page 236.
	ф	To display the content using the bar format. For details, see "Bar format" on page 235
	mid .	To display the content using the horizontal enriched column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	<del>)</del>	To display the content using the vertical Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on

UI Element	Description	
		page 224.
	~	To display the content using the single line graph format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	20	To display the content using the cluster bar format. For details, see "Cluster Bar format" on page 237.
		To display the content using the stacked bar format. For details, see "Stacked Bar format" on page 239.
	11	To display the content using the bar and line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	1.5	To display the content using the bubble chart format. For details, see "Bubble Chart format" on page 243.
		To display the content using the list format. For details, see "List format" on page 246.
		tails, see On-the-fly Display Format Change in Dashboard Page onents.

**Bubble Chart View - Configure Component Dialog Box** 





UI Element	Description		
Multi Selection/	• <b>Multi Selection.</b> You use this option when you want to compare several metrics or KPIs. For details, see below.		
Breakdown Selection	• <b>Breakdown Selection.</b> Select this option when you want to compare the values of the selected KPI Breakdown dimension. For details, see below.		
<search></search>	Enter the relevant string to display, in the tree, only the Metrics or KPIs (or Metric or KPI Breakdowns) whose name includes the string.		
	In addition, the child KPIs or Metrics of the filtered items are also listed even when the		

UI Element	Description		
	child names do not include the string.		
*	Multi Selection	Advanced Search. Opens additional fields to help you refine the component's filter:  • Status: Select one of the All, Good, Warning, Critical, or No	
		Data values to display only the elements with the selected status, in the Active KPIs or in the tree area. When you select No Data, the search returns only the elements with no data.  Type. Select:	
		All. To display all the elements in the Active KPIs or in the tree with the selected Status.	
		KPIs. To display, in the Active KPIs or in the tree, only the KPIs.	
		Objective. To display in the Active KPIs or in the tree, only the Objectives and their KPIs.	
		Metrics. To display, in the tree, only the Metrics.	
		You can then select the relevant item if any.	
	Breakdown Selection	<b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:	
		Status: Select one of the AII, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs area. When you select No Data, the search returns only the elements with no data.      Type. Select:	
		All. To display, in the tree, all the elements.	
		KPIs. To display, in the tree, only the KPIs.	
		Objective. To display in the tree, only the Objectives and their KPIs.	
		Metrics. To display, in the tree, only the Metrics.	
		You can then select the relevant KPI or Metric Breakdown if any.	
Active	Displayed only	when you select <b>Multi Selection</b> .	
KPIs	and KPI Breakd be selected are	s all the active Scorecards, Perspectives, Objectives, and their KPIs, owns listed in the Active KPIs pane in the Studio. The items that can highlighted (if you have selected <b>Breakdown selection</b> , only the s are highlighted).	

UI Element	Description
	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.
	<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.
Selected	Displayed only when you select Multi Selection.
KPIs	The box lists all the selected metrics or KPIs that you want to display in the component.
	To select or deselect the elements you want to display in the report, use the right and left arrows (a) (a) 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.
	<status sort=""></status>
	• Status sort to sort the selected elements in status 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:
	• <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:
<tree></tree>	Displayed only when you select <b>Breakdown Selection</b> .
	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.
	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.
Selected	Displayed only when you select <b>Breakdown Selection</b> .
metrics	The box lists the selected KPI or Metric Breakdown.
Display	Select the time period to display in the component:
Period	<ul> <li>Current. The values of the selected Metrics or KPIs (Multi Selection) or KPIs or Metric Breakdown dimensions (Breakdown Selection) whose calculation period has not yet completed according to the selected Metrics or KPIs configured periodicity.</li> </ul>
	<ul> <li>Last Closed. The values of the selected Metrics or KPIs Multi Selection or KPIs or Metric Breakdown dimensions (Breakdown Selection) whose calculation period has already completed according to the selected metrics or KPIs configured periodicity.</li> </ul>
	Yearly/Monthly/Quarterly/Weekly/Daily. The list of time periods represents the

UI Element	Description
	longest periodicity configured for the selected Metrics or KPIs (Multi Selection) or KPIs or Metric Breakdown dimensions (Breakdown Selection). When you select Yearly/Monthly/Quarterly/Weekly/Daily, 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 Multi Selection or KPIs or Metric Breakdown dimensions (Breakdown Selection) that have completed for the selected periods.
Maximum	This field is displayed only when you select <b>Breakdown Selection</b> .
Number of Slices	• 2. The item with the highest value is represented by a bubble. The 3 items with the next highest values are represented by the other bubble. A tooltip displays the details of these 3 items.
	• 3, 4, 5, 6, 7, 8, 9, 10, 15. The item with the highest value is represented by a bubble. Depending on the selected number of bubbles, each one of the other bubbles corresponds to the item with the next highest value. The last bubble represents the 3 items with the next highest values. A tooltip displays the details of these 3 items.

# The Cluster Bar Chart View Component

The Cluster Bar Chart View component displays the list of selected KPIs or Metrics, and their value, trend, and status for the measurement period in cluster bar format, by default.

#### 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.





- 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.



Main task: "Dashboard Display" on page 190

# 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.
- 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.

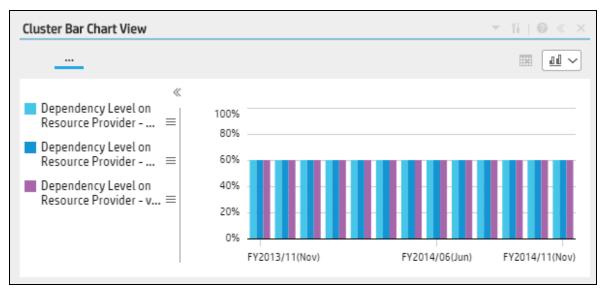
- If the target area is hidden by the Component Gallery dialog box, click the Component Gallery dialog box title bar and drag it to another location on your screen.
- If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of 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 Gallery and Component Categories" on page 218.
- 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 200.



#### **Cluster Bar Chart View Component**



## Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description		
▽	Component Menu. Opens a menu where you can select:		
	Preferences	Preferences. Depending on the	
	component you are current configuring, or <b>Preferences</b> dialog box where you can or in the page by changing the name in the	opens the <b><component_name></component_name></b> change the name of the component	
	◆ Wiring	Wiring. Depending on the	
	component you are currently configuring where you can wire the current componed details, see "Wiring Between Componer"	, opens the Wiring dialog box ent to other components. For	
	Refresh	Refresh. Refreshes the display.	
	The button is disabled in the Page Filter		
	• Open in a New Window	Open in a New Window. Opens	
	the component in a new window.		
AT	<b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.		
	Note:  • The button is disabled in the Breakdow component is filtered by the relevant at on the same Dashboard page. When y wired KPI View, Historical View, or Ro Breakdown View component displays KPI Breakdown for the selected KPI.	utomatically wired components ou select an item in one of these blodex components, the	
	<ul> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.</li> </ul>		
	Note: You can also click here in Click Here to configure it in the center of the component		
0	Opens the online documentation page relevant to the component you are currently configuring.		
*	Collapse component. Collapses the com	ponent.	

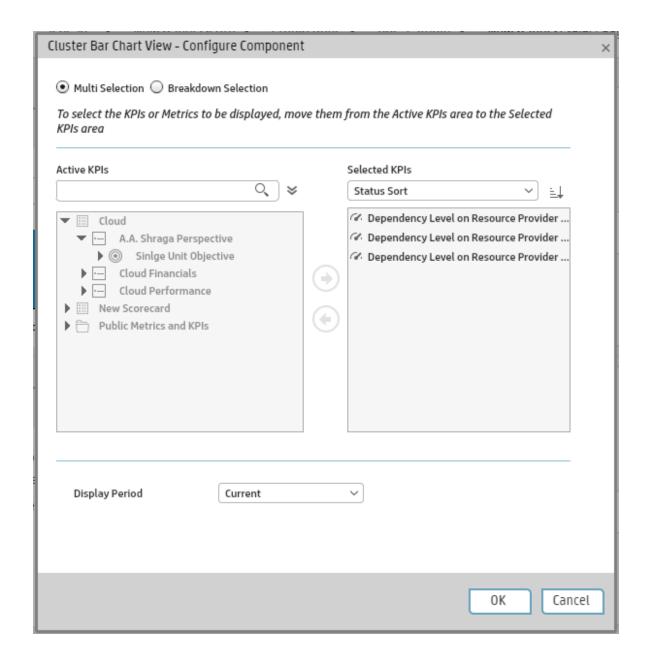
UI Element	Description	
	To expand the collapsed component, click the <sup>™</sup> button on the collapsed component.	
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.	
×	Remove Component. Removes the component from the page.	

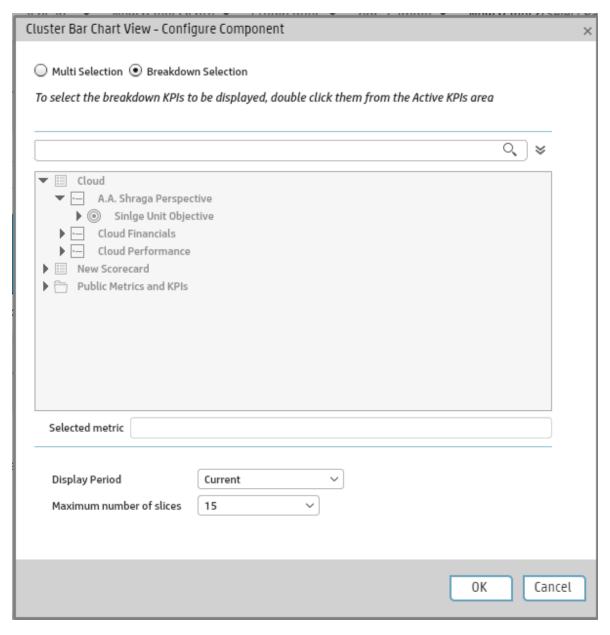
## <Component Contents>

UI Element	Description	
<display format=""></display>		fault, the component displays details about the selected KPIs or Metrics in r bar format. For details, see "Cluster Bar format" on page 237.
(4) V		an also modify the format of the display of the component on the fly, by ing the relevant format. Some of the formats might not be applicable.
	The fo	rmats you can select are:
	i i	To display the contents of the component using the enriched vertical column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	d	To display the contents of the component using the horizontal Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	₺	To display the content using the multiple line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	95	To display the content using the pie format. For details, see "Pie format" on page 236.
	щ	To display the content using the bar format. For details, see "Bar format" on page 235
	mē'	To display the content using the horizontal enriched column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	€	To display the content using the vertical Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on

UI Element	Description		
		page 224.	
	~	To display the content using the single line graph format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	11	To display the content using the cluster bar format. For details, see "Cluster Bar format" on page 237.	
		To display the content using the stacked bar format. For details, see "Stacked Bar format" on page 239.	
	<u> </u>	To display the content using the bar and line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	.*	To display the content using the bubble chart format. For details, see "Bubble Chart format" on page 243.	
		To display the content using the list format. For details, see "List format" on page 246.	
	For details, see On-the-fly Display Format Change in Dashboard Page Components.		

Cluster Bar Chart View - Configure Component Dialog Box





UI Element	Description		
Multi Selection/	• <b>Multi Selection.</b> You use this option when you want to compare several metrics or KPIs. For details, see below.		
Breakdown Selection	Breakdown Selection. Select this option when you want to compare the values of the selected KPI Breakdown dimension. For details, see below.		
<search></search>	Enter the relevant string to display, in the tree, only the Metrics or KPIs (or Metric or KPI Breakdowns) whose name includes the string.		
	In addition, the child KPIs or Metrics of the filtered items are also listed even when the		

UI Element	Description		
	child names do not include the string.		
*	Multi Selection	<b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:	
		Status: Select one of the AII, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs or in the tree area. When you select No Data, the search returns only the elements with no data.	
		Type. Select:	
		<ul> <li>All. To display all the elements in the Active KPIs or in the tree with the selected Status.</li> </ul>	
		KPIs. To display, in the Active KPIs or in the tree, only the KPIs.	
		Objective. To display in the Active KPIs or in the tree, only the Objectives and their KPIs.	
		Metrics. To display, in the tree, only the Metrics.	
		You can then select the relevant item if any.	
	Breakdown Selection	<b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:	
		Status: Select one of the AII, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs area. When you select No Data, the search returns only the elements with no data.	
		• Type. Select:	
		All. To display, in the tree, all the elements.	
		KPIs. To display, in the tree, only the KPIs.	
		<ul> <li>Objective. To display in the tree, only the Objectives and their KPIs.</li> </ul>	
		Metrics. To display, in the tree, only the Metrics.	
		You can then select the relevant KPI or Metric Breakdown if any.	
Active	Displayed only	when you select <b>Multi Selection</b> .	
KPIs	The tree box lists all the active Scorecards, Perspectives, Objectives, and and KPI Breakdowns listed in the Active KPIs pane in the Studio. The items be selected are highlighted (if you have selected <b>Breakdown selection</b> , on KPI Breakdowns are highlighted).		

UI Element	Description
	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.
	<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.
Selected	Displayed only when you select <b>Multi Selection</b> .
KPIs	The box lists all the selected metrics or KPIs that you want to display in the component.
	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.
	<status sort=""></status>
	• Status sort to sort the selected elements in status 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:
	• Alphabetical sort 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:
<tree></tree>	Displayed only when you select Breakdown Selection.
	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.
	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.
Selected	Displayed only when you select <b>Breakdown Selection</b> .
metrics	The box lists the selected KPI or Metric Breakdown.
Display	Select the time period to display in the component:
Period	<ul> <li>Current. The values of the selected Metrics or KPIs (Multi Selection) or KPIs or Metric Breakdown dimensions (Breakdown Selection) whose calculation period has not yet completed according to the selected Metrics or KPIs configured periodicity.</li> </ul>
	<ul> <li>Last Closed. The values of the selected Metrics or KPIs Multi Selection or KPIs or Metric Breakdown dimensions (Breakdown Selection) whose calculation period has already completed according to the selected metrics or KPIs configured periodicity.</li> </ul>
	Yearly/Monthly/Quarterly/Weekly/Daily. The list of time periods represents the

UI Element	Description
	longest periodicity configured for the selected Metrics or KPIs (Multi Selection) or KPIs or Metric Breakdown dimensions (Breakdown Selection). When you select Yearly/Monthly/Quarterly/Weekly/Daily, 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 Multi Selection or KPIs or Metric Breakdown dimensions (Breakdown Selection) that have completed for the selected periods.
Maximum	This field is displayed only when you select <b>Breakdown Selection</b> .
Number of Slices	• 2. The item with the highest value is represented by a bubble. The 3 items with the next highest values are represented by the other bubble. A tooltip displays the details of these 3 items.
	• 3, 4, 5, 6, 7, 8, 9, 10, 15. The item with the highest value is represented by a bubble. Depending on the selected number of bubbles, each one of the other bubbles corresponds to the item with the next highest value. The last bubble represents the 3 items with the next highest values. A tooltip displays the details of these 3 items.

# The Forecast Component

The Forecast component provides a glimpse into the future by forecasting the entity future behavior, based on historical data, of the selected KPI or Metric, so you will be able more easily understand the underlying trend and to do all you can now to improve or maintain the desired behavior.

You can view the forecast of the upcoming future of the selected KPIs, or Metrics (for which you have permission), in a period of up to 1 year from the current period.

The Forecast button is enabled only when you have the **Forecast** permission. For details about permissions, see User Management in the *IT Executive Scorecard Administrator Guide*.

#### To access:

You can view the report in the relevant page in the Dashboard.





- 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.

#### Wiring to other components

The Forecast component is automatically wired to the Historical View component. For details, see "The Historical View Component" on page 298.

#### Wiring

**Wiring.** Wiring is between components. It does not depend on the component internal format. For details, see "Wiring Between Components" on page 438.

If you drill down (to Breakdowns) in a specific component that is wired to another component on the same page, and you click the triggering component, the component with the Breakdowns is restored to its top level and filtered according to the triggering component.

The Historical View component is automatically wired to the Breakdown View component and to the Forecast component. For details, see "The Breakdown View Component" on page 254 and "The Forecast Component" above.



Main task: "Dashboard Display" on page 190

## 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 Gallery and Component Categories" on page 218.
- 5. In the component, click the Configure Component 11 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 200.



#### **Forecast Component**

The Forecast component is on the right. It displays the forecast for the KPI selected in the Historical View component or selected in the Forecast - Configure Component dialog box.



## <Component Toolbar>

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description		
▽	Component Menu. Opens a menu where ye	ou can select:	
	component you are current configuring, o		
	<b>Preferences</b> dialog box where you can che in the page by changing the name in the <b>N</b>	•	
	Wiring	<b>Wiring.</b> Depending on the	
	component you are currently configuring, where you can wire the current component details, see "Wiring Between Component	nt to other components. For	
	Refresh	Refresh. Refreshes the display.	
	The button is disabled in the Page Filter c	omponent.	
		Open in a New Window. Opens	
	the component in a new window.		
YI	<b>Configure Component.</b> Opens the Configure relevant component. For details, see the rele		
	Note:  The button is disabled in the Breakdown component is filtered by the relevant aut on the same Dashboard page. When yo wired KPI View, Historical View, or Role Breakdown View component displays the KPI Breakdown for the selected KPI.  The button is disabled in the Forecast or	tomatically wired components by select an item in one of these odex components, the he values of the	
	filtered by the relevant automatically win Dashboard page. When you select an it Historical View, the Forecast component the selected KPI.	red components on the same em in one of these wired	
	Note: You can also click here in Click He of the component	re to configure it in the center	

UI Element	Description
0	Opens the online documentation page relevant to the component you are currently configuring.
	Collapse component. Collapses the component.  To expand the collapsed component, click the   button on the collapsed component.
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

## <Graph area>

The Forecast component displays the forecast for the KPI selected in the Historical View component or selected in Forecast - Configure Component dialog box.

UI Element	Description		
<trend line=""></trend>	The trend line shows the trend for the relevant time frame. It is calculated on the fly and as the linear function.  The time frame depends on the periodicity specified when configuring the KPI or Metric:		
	KPI or Metric Periodicity	Forecast time period	
	1 day	14 days	
	1 week	4 weeks	
	1 month	3 months	
	1 quarter	3 quarters	
	1 year	3 years	
<threshold></threshold>	The thresholds of the item are displayed on the right of the component.		

UI Element	Description
<y-axis></y-axis>	The Y-axis displays the values of the item in the relevant unit.
<x-axis></x-axis>	The X-axis displays the time frame for the trend calculation, split into equal segments, depending on the Display Period.

# The Historical Metric View Component

The Historical Metric View component displays the over time value and trend of the Metrics or the over time value, trend, status, and thresholds of the KPIs you selected in the Historical Metric View Component Filter.

#### 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.





- 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.



Main task: "Dashboard Display" on page 190

# 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** buttor
- 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 Gallery and Component Categories" on page 218.
- 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**.

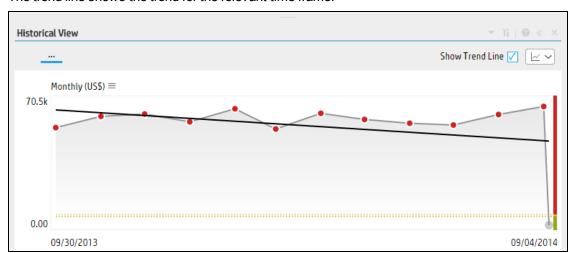
The component displays the required information.

For more information, see "Page Layout and Components" on page 200.

# Display the trend line

In the Historical Metric View component:

- 1. Make sure that the format of the component display is single line format  $\angle$ .
- 2. Click Show Trend Line
- 3. Select one of the Metrics.
- 4. The trend line shows the trend for the relevant time frame.

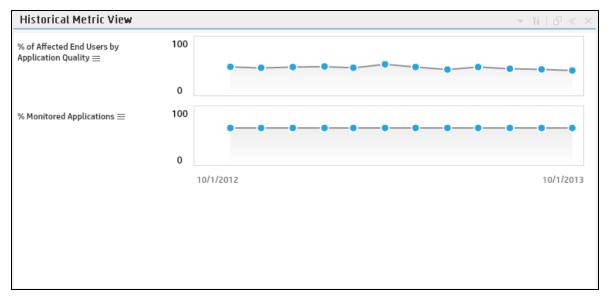




#### Historical Metric View Component (Display) Dialog Box

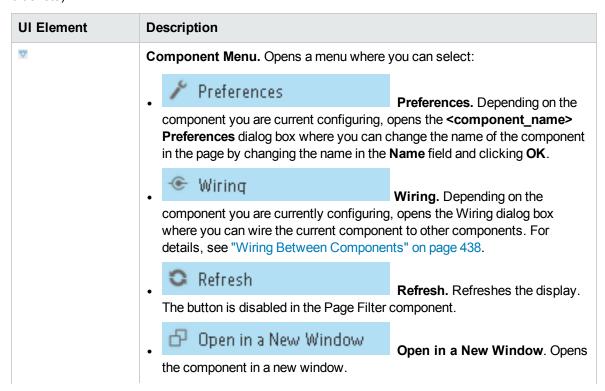
The component displays the over time value, trend, status of the KPIs or metrics you selected in the





### Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.



UI Element	Description	
YI	<b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.	
	Note:	
	<ul> <li>The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.</li> </ul>	
	<ul> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.</li> </ul>	
	<b>Note:</b> You can also click <b>here</b> in <b>Click Here to configure it</b> in the center of the component	
0	Opens the online documentation page relevant to the component you are currently configuring.	
*	Collapse component. Collapses the component.	
	To expand the collapsed component, click the ≥ button on the collapsed component.	
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.	
×	Remove Component. Removes the component from the page.	

## **Component Contents**

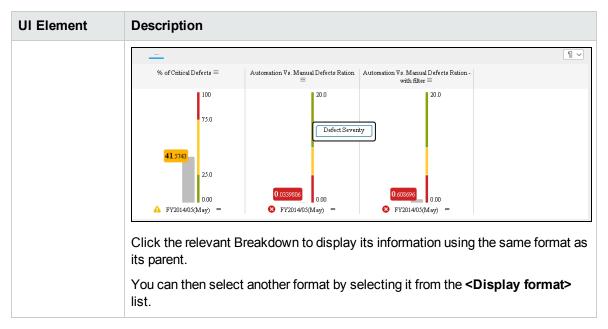
User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets):

**Note:** Some of the graphs below display thresholds. When the selected item is a Metric (that does not have thresholds), the graph displays the data without the threshold element.

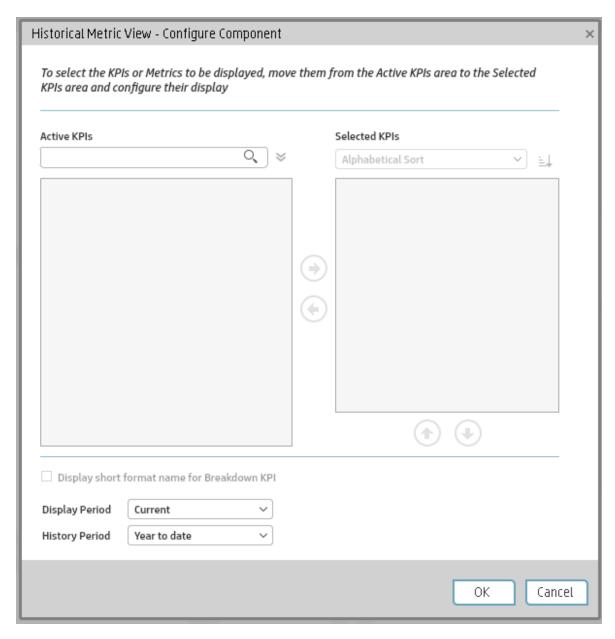
UI Element	Description	
<breadcrumbs></breadcrumbs>	When you have selected a Breakdown (see below for more details), the	

UI Element	Description
	breadcrumb displays the level of the displayed element:
	> Automation Vs. Man Defect Severity
	Click the relevant item in the breadcrumb list to go back to a previous level.
	Enables the on-demand periodicity temporary recalculation and display.
	The icon appears only for gauge, bar, or multi-line formats, and only in the following components:
	KPI Rolodex Component
	The Breakdown View Component
	The Bubble Chart View Component
	The Cluster Bar Chart View Component
	The Line and Bar Chart View Component
	The Historical Metric View Component
	The Historical View Component
	The KPI List Component
	The KPI View Component
	The Pie Chart Component
	The Stacked Bar Chart View Component
	For details, see On-demand Periodicity in Component Display.
<display format=""></display>	You can modify the format of the display of some of the components on the fly, by selecting the relevant format. Some of the formats are not applicable to some of the components.
	The components for which you can modify the display format on-the-fly are:
	KPI Rolodex Component
	The Breakdown View Component
	The Bubble Chart View Component
	The Cluster Bar Chart View Component
	The Line and Bar Chart View Component
	The Historical Metric View Component
	The Historical View Component
	The KPI List Component
	The KPI View Component
	The Pie Chart Component
	The Stacked Bar Chart View Component
	The formats you can select are:

UI Element	Description	
	To display the contents of the component using the enriched vertical column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	To display the contents of the component using the horizontal Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	To display the content using the multiple line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	To display the content using the pie format. For details, see "Pie format" on page 236.	
	To display the content using the bar format. For details, see "Bar format" on page 235	
	To display the content using the horizontal enriched column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	To display the content using the vertical Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	To display the content using the single line graph format. For details, see "Change, On-the-fly, the Component Display Format" on page 224	
	To display the content using the cluster bar format. For details, see "Cluster Bar format" on page 237.	
	To display the content using the stacked bar format. For details, see "Stacked Bar format" on page 239.	
	To display the content using the bar and line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	To display the content using the bubble chart format. For details, see "Bubble Chart format" on page 243.	
	To display the content using the list format. For details, see "List format" on page 246.	
	For details, see On-the-fly Display Format Change in Dashboard Page Components.	
<breakdowns></breakdowns>	The cursor changes from an arrow to a hand indicates that the displayed item has a Breakdown.	
	Click the displayed item to list the available Breakdowns:	



**Historical Metric View - Configure Component Filter Dialog Box** 



UI Element	Description
Q,	Enter the relevant string to display, in the tree, only the Metrics and the KPIs with a name that includes the string.
	In addition, the child Metrics of the filtered Metrics are also listed even when the child Metric names do not include the string.
⋄	<ul> <li>Advanced Search. Opens additional fields to help you refine the component's filter:</li> <li>Status: Select one of the All, Good, Warning, Critical, or No Data values to</li> </ul>

UI Element	Description
	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.
	Type: Select:
	All. To display all the elements in the tree with the selected Status.
	KPI. To display only the KPIs with the selected status.
	<ul> <li>Metric. To display a list of all the Metrics (the Status is changed to AII). If you had selected a value in Status, and then you select Metric, then the Status field is changed to AII and becomes inaccessible.</li> </ul>
	Objective. To display only the Objectives with the selected status, and their KPIs.
Active KPIs	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.
	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.
Selected KPIs	The right-side box lists all the selected KPIs or metrics that you want to display in the component.
	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.
<status< th=""><th>Select:</th></status<>	Select:
sort>	• <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:
	<ul> <li>Status sort to sort the selected elements according to their status (for example: KPIs with the Critical status, followed by KPIs with a Warning status, and then KPIs with a Good status).</li> </ul>
	Manual sort to sort the selected elements manually using the buttons. The buttons are available only when you select Manual sort.
Display Note:	
short format name for KPI Breakdown	<ul> <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</li> </ul>
	selected when you created it.

### **UI Element** Description In the Dashboard components, this can cause problems because the complete name of the KPI Breakdown is not displayed. KPI with many breakdown KPI with many breakdown KPI with many breakdown KPI with many breakdown results: 2005.0 ≡ results: 2006.0 ≡ results: 2007.0 ≡ results: 2008.0 ≡ To display, in the component, only the name of the entity and dimension instead of the complete name of the KPI Breakdown: 1. Move the relevant KPI/Metric Breakdown to the Selected KPIs area. The **Display short format name for KPI Breakdown** option is enabled. 2. Select the **Display short format name for KPI Breakdown** option and click The component display shows the short names of the KPI/Metric Breakdowns. A tooltip displays the full name of the KPI Breakdowns. YearNumber: 2005.0 ≡ YearNumber: 2006.0 ≡ YearNumber: 2007.0 ≡ YearNumber: 2008.0 = For details on KPI Breakdowns, see "KPI Breakdowns" on page 166. Display Select the time period to be displayed in the component: Period Current. 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 **History Period** list. Last Closed. The values of only the KPIs whose calculation period has completed for the time period selected in the **History Period** list. • Yearly/Monthly/Quarterly/Weekly/Daily. 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 Yearly/Monthly/Quarterly/Weekly/Daily, 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. History Select one of the following options: Period • Quarter to date. 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 **Display** Period. Half a year to date. 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 **Display** Period. Year to date. 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 **Display Period**. • 2 years to date. 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 **Display Period**.

UI Element	Description
	• 3 years to date. 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> .
	Note:
	<ul> <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 History Period field.</li> </ul>
	<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.
	<ul> <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> </ul>
	<ul> <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> </ul>
	<ul> <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> </ul>
	<ul> <li>If the report includes more than one chart, the X-axis spans the whole selected time frame.</li> </ul>

## The Historical View Component

The Historical View component displays the over time value, trend, status, and threshold of the KPIs or the over time value and trend of the Metric you selected in the Historical View - Configure Component dialog box.

#### 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.





- 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.

### Wiring to other components

The Historical View component is automatically wired to the Breakdown View component. For details, see "The Breakdown View Component" on page 254.

**Wiring.** Wiring is between components. It does not depend on the component internal format. For details, see "Wiring Between Components" on page 438.

If you drill down (to Breakdowns) in a specific component that is wired to another component on the same page, and you click the triggering component, the component with the Breakdowns is restored to its top level and filtered according to the triggering component.

The Historical View component is automatically wired to the Breakdown View component and to the Forecast component. For details, see "The Breakdown View Component" on page 254 and "The Forecast Component" on page 282.



Main task: "Dashboard Display" on page 190

## 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 Gallery and Component Categories" on page 218.
- 5. In the component, click the Configure Component 11 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 200.

## Display the trend line

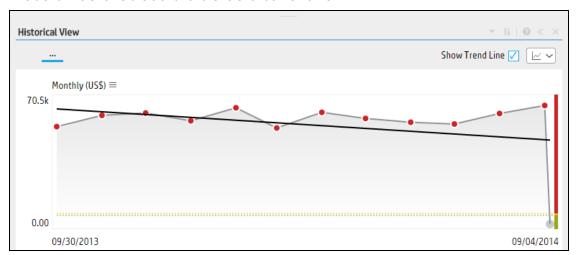
?????In the Historical View component:

		1 2
1.	Make sure that the format of the component display is single line format	100
• •	make suite that the format of the component display is single line format	

2 Click Show Trend Line

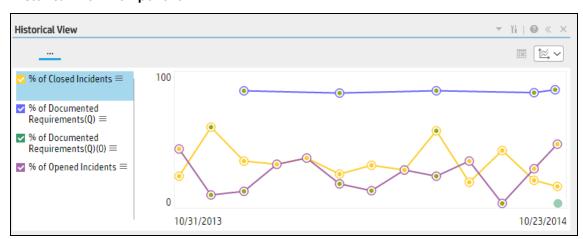
3. Select one of the KPIs.





# Ul Description

### **Historical View Component**



## Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description	
▼	Component Menu. Opens a menu where you can select:	

UI Element	Description		
	• Preferences  component you are current configuring, or Preferences dialog box where you can do in the page by changing the name in the	change the name of the component	
	component you are currently configuring where you can wire the current componed details, see "Wiring Between Componer"	ent to other components. For	
	• Refresh The button is disabled in the Page Filter	Refresh. Refreshes the display. component.	
	• Open in a New Window the component in a new window.	Open in a New Window. Opens	
YI	<b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.		
	Note:  • The button is disabled in the Breakdow component is filtered by the relevant at on the same Dashboard page. When y wired KPI View, Historical View, or Ro Breakdown View component displays KPI Breakdown for the selected KPI.	utomatically wired components ou select an item in one of these plodex components, the	
	The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.		
Note: You can also click here in Click Here to of the component		ere to configure it in the center	
0	Opens the online documentation page relevant to the component you are currently configuring.		
*	Collapse component. Collapses the com		
	To expand the collapsed component, click component.	the ♥ button on the collapsed	

UI Element	Description
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

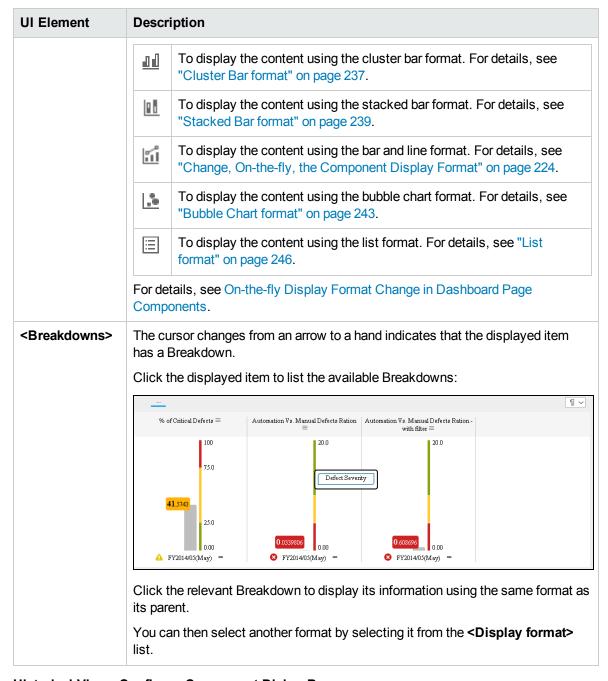
## **Component Contents**

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

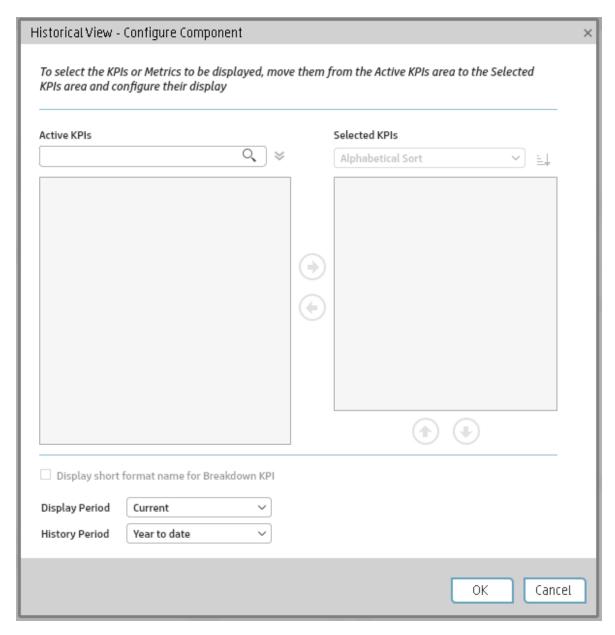
**Note:** Some of the graphs below display thresholds. When the selected item is a Metric (that does not have thresholds), the graph displays the data without the threshold element.

UI Element	Description		
<breadcrumbs></breadcrumbs>	When you have selected a Breakdown (see below for more details), the breadcrumb displays the level of the displayed element:		
	> Automation Vs. Man Defect Severity		
	Click the relevant item in the breadcrumb list to go back to a previous level.		
	Enables the on-demand periodicity temporary recalculation and display.		
	The icon appears only for gauge, bar, or multi-line formats, and only in the following components:		
	KPI Rolodex Component		
	The Breakdown View Component		
	The Bubble Chart View Component		
	The Cluster Bar Chart View Component		
	The Line and Bar Chart View Component		
	The Historical Metric View Component		
	The Historical View Component		
	The KPI List Component		
	The KPI View Component		
	The Pie Chart Component		
	The Stacked Bar Chart View Component		
	For details, see On-demand Periodicity in Component Display.		
<display< th=""><td colspan="2">You can modify the format of the display of some of the components on the fly, by selecting the relevant format. Some of the formats are not applicable to some</td></display<>	You can modify the format of the display of some of the components on the fly, by selecting the relevant format. Some of the formats are not applicable to some		

UI Element	Description		
(4) V	of the components.		
format>	The components for which you can modify the display format on-the-fly are:		
	KPI Rolodex Component		
	The Breakdown View Component		
	The Bubble Chart View Component		
	The Cluster Bar Chart View Component		
	The Line and Bar Chart View Component		
	The Historical Metric View Component		
	The Historical View Component		
	The KPI List Component		
	The KPI View Component		
	The Pie Chart Component		
	The Stacked Bar Chart View Component		
	The formats you can select are:		
	To display the contents of the component using the enriched vertical column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the contents of the component using the horizontal Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the multiple line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the pie format. For details, see "Pie format" on page 236.		
	To display the content using the bar format. For details, see "Bar format" on page 235		
	To display the content using the horizontal enriched column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the vertical Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the single line graph format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		



**Historical View - Configure Component Dialog Box** 



UI Element	Description
Q,	Enter the relevant string to display, in the tree, only the KPIs whose name includes the string.
	In addition, the child KPIs of the filtered KPIs are also listed even when the child KPIs names do not include the string.
*	<ul> <li>Advanced Search. Opens additional fields to help you refine the component's filter:</li> <li>Status: Select one of the All, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs area. When</li> </ul>

UI Element	Description	
	you select <b>No Data</b> , the search returns only the elements with no data.  • <b>Type:</b> Select:	
	<ul> <li>All. To display all the elements in the tree with the selected status.</li> </ul>	
	KPI. To display only the KPIs with the selected status.	
	<ul> <li>Objective. To display only the Objectives with the selected status, and their KPIs.</li> </ul>	
Active KPIs	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.	
	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.	
Selected KPIs	The right-side box lists all the selected KPIs that you want to display in the component.	
	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.	
<status< th=""><th>Select:</th></status<>	Select:	
sort>	• <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:	
	<ul> <li>Status sort to sort the selected elements according to their status (for example: KPIs with the Critical status, followed by KPIs with a Warning status, and then KPIs with a Good status).</li> </ul>	
	Manual sort to sort the selected elements manually using the buttons. The buttons are available only when you select Manual sort.	
#T  <u>=</u> ↓	Click to display the KPIs in ascending or descending alphabetical order.	
Display short format name for KPI Breakdown	<ul> <li>Note:</li> <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>	
	In the Dashboard components, this can cause problems because the complete name of the KPI Breakdown is not displayed.	

### **UI Element** Description KPI with many breakdown KPI with many breakdown KPI with many breakdown KPI with many breakdown results: 2007.0 ≡ results: 2005.0 = results: 2006.0 ≡ results: 2008.0 ≡ To display, in the component, only the name of the entity and dimension instead of the complete name of the KPI Breakdown: Move the relevant KPI/Metric Breakdown to the Selected KPIs area. The Display short format name for KPI Breakdown option is enabled. 2. Select the **Display short format name for KPI Breakdown** option and click The component display shows the short names of the KPI/Metric Breakdowns. A tooltip displays the full name of the KPI Breakdowns. YearNumber: 2005.0 = YearNumber: 2006.0 ≡ YearNumber: 2007.0 = YearNumber: 2008.0 = For details on KPI Breakdowns, see "KPI Breakdowns" on page 166. Display Select the time period to be displayed in the component: Period Current. 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 History Period list. <Longest\_period>. 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. **Example** If one of the selected KPI period is **Weekly** and another is **Yearly**, the Display Period field lists: Current, Yearly, and Last Closed. When you select the **<Longest period>** another field opens on the right. It lists only the corresponding periods when KPI values, statuses, and scores were calculated by the engine. **Example** If you select **Quarterly**, and the engine did not calculate the value of any KPI with the Quarterly 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. • Last Closed. The values of only the KPIs whose calculation period has completed for the time period selected in the **History Period** list. History Select one of the following options: Period • Quarter to date. 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 **Display** Period. Half a year to date. The report's display period starts 6 months prior to the current

UI Element	Description			
	date or prior to the selected year, month, quarter, week, or day in the <b>Display Period</b> .			
	<ul> <li>Year to date. 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 Display Period.</li> </ul>			
	• 2 years to date. 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> .			
	• 3 years to date. 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> .			
	Note:			
	<ul> <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>			
	<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).			
	<ul> <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> </ul>			
	<ul> <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> </ul>			
	<ul> <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> </ul>			
	<ul> <li>If the report includes more than one chart, the X-axis spans the whole selected time frame.</li> </ul>			

## 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.





- 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.



Main task: "Dashboard Display" on page 190

## 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.
- 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.

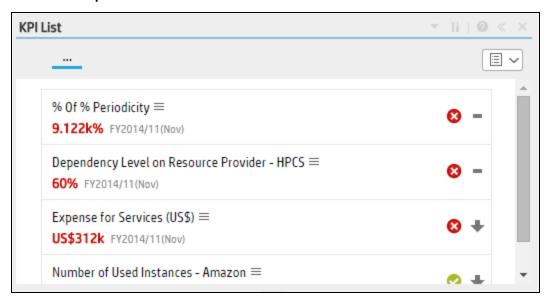
- If the target area is hidden by the Component Gallery dialog box, click the Component Gallery dialog box title bar and drag it to another location on your screen.
- If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of 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 Gallery and Component Categories" on page 218.
- 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 200.



#### **KPI List Component**



### Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description		
▽	Component Menu. Opens a menu where you can select:		
	Preferences	Preferences. Depending on the	
	component you are current configuring, opens the <b><component_name></component_name> 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> .		
	◆ Wiring	Wiring. 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 "Wiring Between Components" on page 438.		
	Refresh	Refresh. Refreshes the display.	
	The button is disabled in the Page Filter		
	• Open in a New Window	Open in a New Window. Opens	
	the component in a new window.		
AT	<b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.		
	<ul> <li>Note:</li> <li>The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.</li> </ul>		
	<ul> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.</li> </ul>		
	Note: You can also click here in Click Here to configure it in the center of the component		
0	Opens the online documentation page relevant to the component you are currently configuring.		
*	Collapse component. Collapses the com	ponent.	

UI Element	Description	
	To expand the collapsed component, click the ≥ button on the collapsed component.	
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.	
×	Remove Component. Removes the component from the page.	

## <Component Contents>

UI Element	Description			
<display format=""></display>	By default, the component displays details about the selected KPIs or Metrics in list format. For details, see "List format" on page 246.			
(A) V		an also modify the format of the display of the component on the fly, by ing the relevant format. Some of the formats might not be applicable.		
	The formats you can select are:			
		To display the contents of the component using the enriched vertical column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	45	To display the contents of the component using the horizontal Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	t≊,	To display the content using the multiple line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	94	To display the content using the pie format. For details, see "Pie format" on page 236.		
	щ	To display the content using the bar format. For details, see "Bar format" on page 235		
	mil.	To display the content using the horizontal enriched column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	<del>)</del>	To display the content using the vertical Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on		

UI Element	Description		
		page 224.	
	~	To display the content using the single line graph format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	20	To display the content using the cluster bar format. For details, see "Cluster Bar format" on page 237.	
		To display the content using the stacked bar format. For details, see "Stacked Bar format" on page 239.	
	11	To display the content using the bar and line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	1,%	To display the content using the bubble chart format. For details, see "Bubble Chart format" on page 243.	
		To display the content using the list format. For details, see "List format" on page 246.	
		tails, see On-the-fly Display Format Change in Dashboard Page onents.	

**KPI List - Configure Component Dialog Box** 



UI Element	Description	
<search></search>	Enter the relevant string to display, in the tree, only the KPIs whose name includes th string.	
	In addition, the child KPIs of the filtered KPIs are also listed even when the child KPIs names do not include the string.	
*	<ul> <li>Advanced Search. Opens additional fields to help you refine the component's filter:</li> <li>Status: Select one of the All, Good, Warning, Critical, or No Data values to</li> </ul>	

UI Element	Description		
	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.		
	• Type: Select:		
	All. To display all the elements in the tree with the selected Status.		
	KPI. To display only the KPIs with the selected status.		
	<ul> <li>Metric. To display a list of all the Metrics (the Status is changed to AII). If you had selected a value in Status, and then you select Metric, then the Status field is changed to AII and becomes inaccessible.</li> </ul>		
	Objective. To display only the Objectives with the selected status, and their KPIs.		
Active KPIs	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.		
	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.		
Selected KPIs	The right-side box lists all the selected KPIs that you want to display in the component.		
	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.		
<status< th=""><th>Select:</th></status<>	Select:		
sort>	• <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:		
	<ul> <li>Status sort to sort the selected elements according to their status (for example: KPIs with the Critical status, followed by KPIs with a Warning status, and then KPIs with a Good status).</li> </ul>		
	Manual sort to sort the selected elements manually using the buttons. The buttons are available only when you select Manual sort.		
F*  <u>L</u>	Click to display the KPIs in ascending or descending alphabetical order.		
Display short format name for KPI	<ul> <li>Note:</li> <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</li> </ul>		
Breakdown			

### **UI Element** Description name of the parent KPI followed by the names of the entity and dimension you selected when you created it. In the Dashboard components, this can cause problems because the complete name of the KPI Breakdown is not displayed. KPI with many breakdown KPI with many breakdown KPI with many breakdown KPI with many breakdown results: 2005.0 ≡ results: 2008.0 ≡ To display, in the component, only the name of the entity and dimension instead of the complete name of the KPI Breakdown: 1. Move the relevant KPI Breakdown to the Selected KPIs area. The **Display short** format name for KPI Breakdown option is enabled. 2. Select the **Display short format name for KPI Breakdown** option and click The component display shows the short names of the KPI Breakdowns. A tooltip displays the full name of the KPI Breakdowns. YearNumber: 2005.0 ≡ YearNumber: 2006.0 ≡ YearNumber: 2007.0 ≡ YearNumber: 2008.0 = For details on KPI Breakdowns, see "KPI Breakdowns" on page 166. Display Select the time period to be displayed in the component: Period • Current. 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. <Longest\_period>. 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 Weekly and another is Yearly, the Display Period field lists: Current, Yearly, and Last Closed. When you select the **<Longest period>** another field opens on the right. It lists only the corresponding periods when the engine performed calculations. For example, if you select Quarterly, and the engine did not calculate the value of any KPI with the **Quarterly** period during the first and second quarters of 2008, these periods are not listed in the second field of the Display Period field. Last Closed. The values of only the KPIs whose calculation period has completed.

## KPI Rolodex Component

The KPI Rolodex component displays the value, trend, and status of the selected KPIs or the value and trend of the selected Metrics 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 254.

#### 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.





- 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.

#### Wiring to other components

The KPI Rolodex component is automatically wired to the Breakdown View component. For details, see "The Breakdown View Component" on page 254.

**Wiring.** Wiring is between components. It does not depend on the component internal format. For details, see "Wiring Between Components" on page 438.

If you drill down (to Breakdowns) in a specific component that is wired to another component on the same page, and you click the triggering component, the component with the Breakdowns is restored to its top level and filtered according to the triggering component.

The Historical View component is automatically wired to the Breakdown View component and to the Forecast component. For details, see "The Breakdown View Component" on page 254 and "The Forecast Component" on page 282.



Main task: "Dashboard Display" on page 190

## 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.

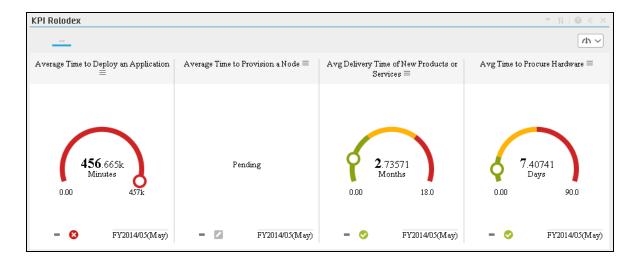
- If the target area is hidden by the Component Gallery dialog box, click the Component Gallery dialog box title bar and drag it to another location on your screen.
- If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of 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 Gallery and Component Categories" on page 218.
- 5. In the component, click the **Configure Component** 11 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 200.



**KPI Rolodex Component** 



## Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description		
▽	Component Menu. Opens a menu where you can select:		
	Preferences	<b>Preferences.</b> Depending on the	
	component you are current configuring, or <b>Preferences</b> dialog box where you can or in the page by changing the name in the	opens the <b><component_name></component_name></b> change the name of the component	
	· Wiring	Wiring. 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 "Wiring Between Components" on page 438.		
	Refresh	Refresh. Refreshes the display.	
	The button is disabled in the Page Filter		
	Open in a New Window	Open in a New Window. Opens	
	the component in a new window.		
YI.	<b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.		

UI Element	Description
	Note:
	<ul> <li>The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.</li> </ul>
	<ul> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.</li> </ul>
	Note: You can also click here in Click Here to configure it in the center of the component
0	Opens the online documentation page relevant to the component you are currently configuring.
*	Collapse component. Collapses the component.
	To expand the collapsed component, click the <sup>™</sup> button on the collapsed component.
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

## **Component Contents**

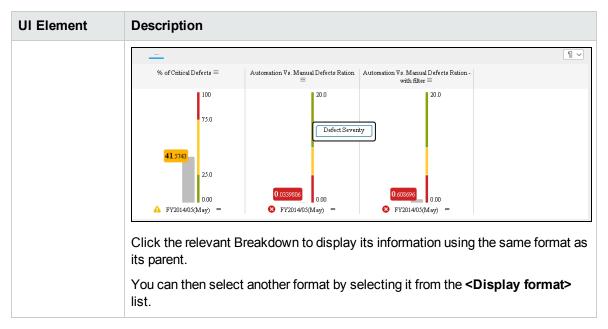
User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets):

**Note:** Some of the graphs below display thresholds. When the selected item is a Metric (that does not have thresholds), the graph displays the data without the threshold element.

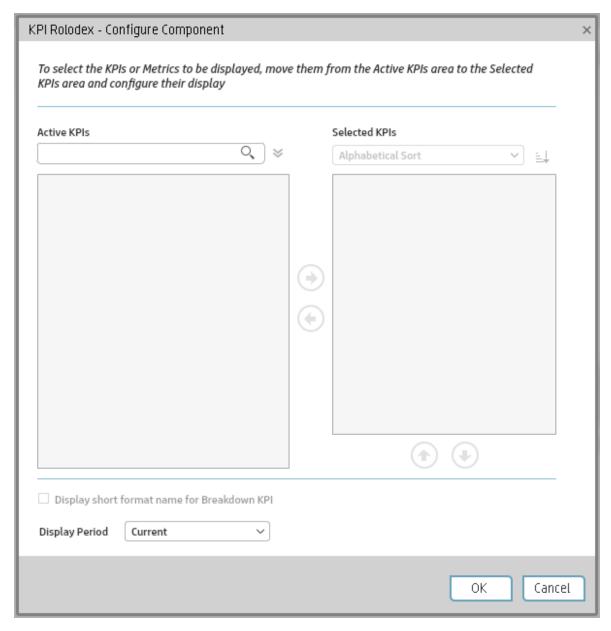
UI Element	Description
<breadcrumbs></breadcrumbs>	When you have selected a Breakdown (see below for more details), the breadcrumb displays the level of the displayed element:

UI Element	Description
	> Automation Vs. Man Defect Severity
	Click the relevant item in the breadcrumb list to go back to a previous level.
	Enables the on-demand periodicity temporary recalculation and display.
	The icon appears only for gauge, bar, or multi-line formats, and only in the following components:
	KPI Rolodex Component
	The Breakdown View Component
	The Bubble Chart View Component
	The Cluster Bar Chart View Component
	The Line and Bar Chart View Component
	The Historical Metric View Component
	The Historical View Component
	The KPI List Component
	The KPI View Component
	The Pie Chart Component
	The Stacked Bar Chart View Component
	For details, see On-demand Periodicity in Component Display.
<display format=""></display>	You can modify the format of the display of some of the components on the fly, by selecting the relevant format. Some of the formats are not applicable to some of the components.
	The components for which you can modify the display format on-the-fly are:
	KPI Rolodex Component
	The Breakdown View Component
	The Bubble Chart View Component
	The Cluster Bar Chart View Component
	The Line and Bar Chart View Component
	The Historical Metric View Component
	The Historical View Component
	The KPI List Component
	The KPI View Component
	The Pie Chart Component
	The Stacked Bar Chart View Component
	The formats you can select are:

UI Element	Description		
	To display the contents of the component using the enriched vertical column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the contents of the component using the horizontal Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the multiple line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the pie format. For details, see "Pie format" on page 236.		
	To display the content using the bar format. For details, see "Bar format" on page 235		
	To display the content using the horizontal enriched column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the vertical Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the single line graph format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the cluster bar format. For details, see "Cluster Bar format" on page 237.		
	To display the content using the stacked bar format. For details, see "Stacked Bar format" on page 239.		
	To display the content using the bar and line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the bubble chart format. For details, see "Bubble Chart format" on page 243.		
	To display the content using the list format. For details, see "List format" on page 246.		
	For details, see On-the-fly Display Format Change in Dashboard Page Components.		
Breakdowns>	The cursor changes from an arrow to a hand indicates that the displayed item has a Breakdown.		
	Click the displayed item to list the available Breakdowns:		



**KPI Rolodex - Configure Component Dialog Box** 



UI Element	Description
Q,	Enter the relevant string to display, in the tree, only the KPIs whose name includes the string.
	In addition, the child KPIs of the filtered KPIs are also listed even when the child KPIs names do not include the string.
҂	Advanced Search. Opens additional fields to help you refine the component's filter:
	• Status: Select one of the AII, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs area. When

UI Element	Description	
	you select <b>No Data</b> , the search returns only the elements with no data.  • <b>Type:</b> Select either <b>KPIs</b> or <b>Objectives</b> to display:  • Only the KPIs with the selected status.	
	The Objectives and those of their KPIs that have the selected status.	
Active KPIs	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.	
	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.	
Selected KPIs	The right-side box lists all the selected KPIs that you want to display in the KPI Overtime report.	
	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.	
<status sort&gt;</status 	• Alphabetical sort 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:   • Status sort to sort the selected elements according to their status (for example: KPIs with the Critical status, followed by KPIs with a Warning status, and then KPIs with a Good status).	
	Manual sort to sort the selected elements manually using the buttons. The buttons are available only when you select Manual sort.	
F1 11	Click to display the KPIs in ascending or descending alphabetical order.	
Display short format name for KPI Breakdown	<ul> <li>Note:</li> <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>	
	In the Dashboard components, this can cause problems because the complete name of the KPI Breakdown is not displayed.	
	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 ≡	

UI Element	Description		
	To display, in the component, only the name of the entity and dimension instead of the complete name of the KPI Breakdown:		
<ol> <li>Move the relevant KPI Breakdown to the Selected KPIs area. The Differmat name for KPI Breakdown option is enabled.</li> </ol>			
	<ol><li>Select the Display short format name for KPI Breakdown option and click OK.</li></ol>		
	The component display shows the short names of the KPI Breakdowns. A tooltip displays the full name of the KPI Breakdowns.		
	YearNumber: 2005.0 ≡ YearNumber: 2006.0 ≡ YearNumber: 2007.0 ≡ YearNumber: 2008.0 ≡		
	For details on KPI Breakdowns, see "KPI Breakdowns" on page 166.		
Display	Select the time period to be displayed in the component:		
Period	<ul> <li>Current. 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> </ul>		
	<ul> <li><longest_period>. 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 Weekly and another is Yearly, the Display Period field lists: Current, Yearly, and Last Closed.</longest_period></li> </ul>		
	When you select the <b><longest_period></longest_period></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.  • <b>Last Closed.</b> The values of only the KPIs whose calculation period has completed.		

# The KPI View Component

The KPI View component displays the list of selected KPIs or Metrics 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 254.

#### 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.





- 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.

#### Wiring to other components

The KPI View component is automatically wired to the Breakdown View component. For details, see "The Breakdown View Component" on page 254

**Wiring.** Wiring is between components. It does not depend on the component internal format. For details, see "Wiring Between Components" on page 438.

If you drill down (to Breakdowns) in a specific component that is wired to another component on the same page, and you click the triggering component, the component with the Breakdowns is restored to its top level and filtered according to the triggering component.

The Historical View component is automatically wired to the Breakdown View component and to the Forecast component. For details, see "The Breakdown View Component" on page 254 and "The Forecast Component" on page 282.



Main task: "Dashboard Display" on page 190

## 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.

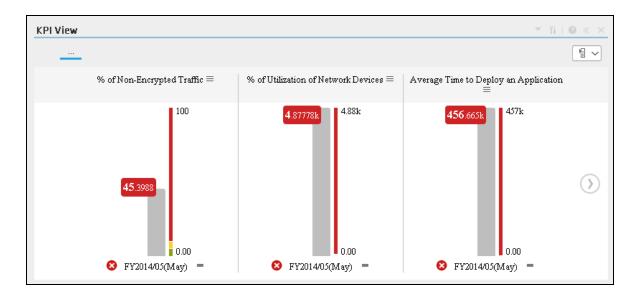
- If the target area is hidden by the Component Gallery dialog box, click the Component Gallery dialog box title bar and drag it to another location on your screen.
- If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of 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 Gallery and Component Categories" on page 218.
- 5. In the component, click the Configure Component 11 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 200.



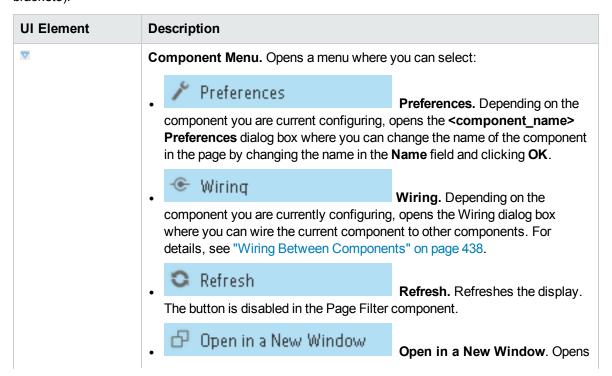
**KPI View Component** 



**Note:** This component is wired, by default, with the Page Filter component. For details, see "The Page Filter Component" on page 347.

### Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.



UI Element	Description
	the component in a new window.
YI	<b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.
	Note:
	<ul> <li>The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.</li> </ul>
	<ul> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.</li> </ul>
	Note: You can also click here in Click Here to configure it in the center of the component
0	Opens the online documentation page relevant to the component you are currently configuring.
<b>≈</b>	Collapse component. Collapses the component.
	To expand the collapsed component, click the <sup>™</sup> button on the collapsed component.
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

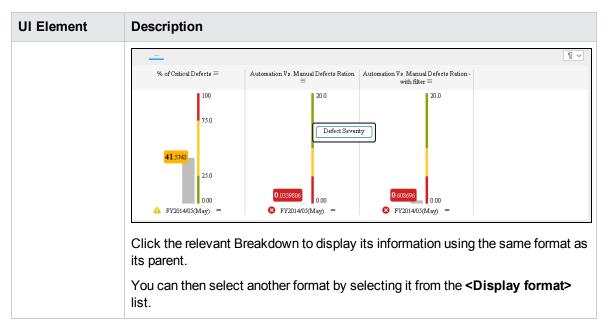
### **Component Contents**

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

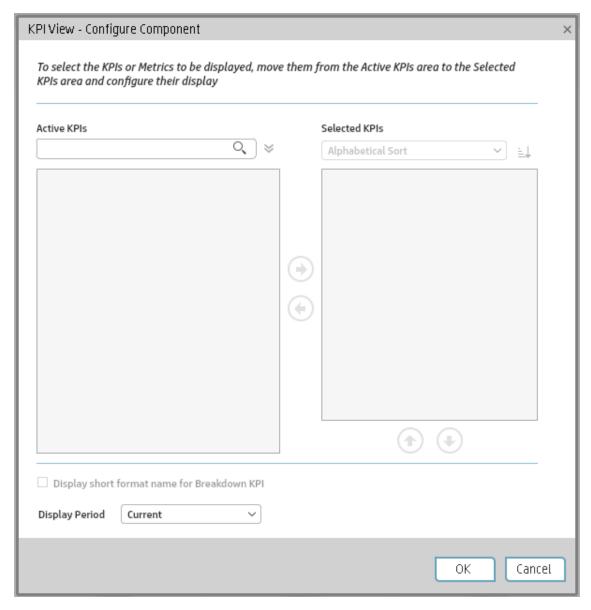
**Note:** Some of the graphs below display thresholds. When the selected item is a Metric (that does not have thresholds), the graph displays the data without the threshold element.

UI Element	Description
<breadcrumbs></breadcrumbs>	When you have selected a Breakdown (see below for more details), the breadcrumb displays the level of the displayed element:
	> Automation Vs. Man Defect Severity
	Click the relevant item in the breadcrumb list to go back to a previous level.
	Enables the on-demand periodicity temporary recalculation and display.
	The icon appears only for gauge, bar, or multi-line formats, and only in the following components:
	KPI Rolodex Component
	The Breakdown View Component
	The Bubble Chart View Component
	The Cluster Bar Chart View Component
	The Line and Bar Chart View Component
	The Historical Metric View Component
	The Historical View Component
	The KPI List Component
	The KPI View Component
	The Pie Chart Component
	The Stacked Bar Chart View Component
	For details, see On-demand Periodicity in Component Display.
<display format="">  ✓ ✓</display>	You can modify the format of the display of some of the components on the fly, by selecting the relevant format. Some of the formats are not applicable to some of the components.
	The components for which you can modify the display format on-the-fly are:
	KPI Rolodex Component
	The Breakdown View Component
	The Bubble Chart View Component
	The Cluster Bar Chart View Component
	The Line and Bar Chart View Component
	The Historical Metric View Component
	The Historical View Component
	The KPI List Component
	The KPI View Component
	The Pie Chart Component
	The Stacked Bar Chart View Component
	The formats you can select are:

UI Element	Description
	To display the contents of the component using the enriched vertical column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	To display the contents of the component using the horizontal Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	To display the content using the multiple line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	To display the content using the pie format. For details, see "Pie format" on page 236.
	To display the content using the bar format. For details, see "Bar format" on page 235
	To display the content using the horizontal enriched column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	To display the content using the vertical Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	To display the content using the single line graph format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	To display the content using the cluster bar format. For details, see "Cluster Bar format" on page 237.
	To display the content using the stacked bar format. For details, see "Stacked Bar format" on page 239.
	To display the content using the bar and line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	To display the content using the bubble chart format. For details, see "Bubble Chart format" on page 243.
	To display the content using the list format. For details, see "List format" on page 246.
	For details, see On-the-fly Display Format Change in Dashboard Page Components.
Breakdowns>	The cursor changes from an arrow to a hand indicates that the displayed item has a Breakdown.
	Click the displayed item to list the available Breakdowns:



**KPI View - Configure Component Dialog Box** 



UI Element	Description
<search></search>	Enter the relevant string to display, in the tree in the Active KPIs box, only the KPIs whose name includes the string.
	In addition, the child KPIs of the filtered KPIs are also listed even when the child KPIs names do not include the string.
*	<b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:
	Status: Select one of the All, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the

UI Element	Description
	Active KPIs area. When you select <b>No Data</b> , the search returns only the elements with no data.
	Type: Select:
	All. To display all the elements in the tree with the selected Status.
	KPIs. To display only the KPIs with the selected status.
	Objectives. The Objectives and those of their KPIs that have the selected status.
Active KPIs	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.
	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.
Selected KPIs	The right-side box lists all the selected KPIs that you want to display in the KPI Overtime report.
	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.
<status sort=""></status>	Select:
	• Alphabetical sort 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:
	Status sort to sort the selected elements according to their status (for example: KPIs with the Critical status, followed by KPIs with a Warning status, and then KPIs with a Good status).
	Manual sort to sort the selected elements manually using the
	buttons. The buttons are available only when you select <b>Manual sort</b> .
F1 =1	Click to display the KPIs in ascending or descending alphabetical order.
Display short format name for KPI Breakdown	Note:  • 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.

UI Element	Description
	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.
	In the Dashboard components, this can cause problems because the complete name of the KPI Breakdown is not displayed.
	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 ≡
	To display, in the component, only the name of the entity and dimension instead of the complete name of the KPI Breakdown:
	<ol> <li>Move the relevant KPI Breakdown to the Selected KPIs area. The Display short format name for KPI Breakdown option is enabled.</li> </ol>
	<ol><li>Select the Display short format name for KPI Breakdown option and click OK.</li></ol>
	The component display shows the short names of the KPI Breakdowns. A tooltip displays the full name of the KPI Breakdowns.
	YearNumber: 2005.0 ≡ YearNumber: 2006.0 ≡ YearNumber: 2007.0 ≡ YearNumber: 2008.0 ≡
	For details on KPI Breakdowns, see "KPI Breakdowns" on page 166.
Layout	Select:
	<ul> <li>Vertical. The layout of the results is vertical (KPI name above graph).</li> <li>Horizontal. The layout of the results is horizontal (KPI name on the left of the graph.</li> </ul>
Display Period	Select the time period to be displayed in the component:
	<ul> <li>Current. 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> </ul>
	<ul> <li><longest_period>. 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 Weekly and another is Yearly, the Display Period field lists: Current, Yearly, and Last Closed.</longest_period></li> </ul>
	When you select the <b><longest_period></longest_period></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.
	Last Closed. The values of only the KPIs whose calculation period has

UI Element	Description
	completed.

# The Line and Bar Combination Chart View Component

The Line and Bar Combination Chart View component displays the list of selected KPIs or Metrics, and their value, trend, and status for the measurement period in line and bar format, by default.

#### 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.





- 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.



Main task: "Dashboard Display" on page 190

### 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 Gallery and Component Categories" on page 218.
- 5. In the component, click the **Configure Component** to 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 200.



### **Line and Bar Combination Chart View Component**



### Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description
☑	Component Menu. Opens a menu where you can select:
	Preferences  Preferences. Depending on the
	component you are current configuring, opens the <b><component_name></component_name> 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> .
	• Wiring. 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 "Wiring Between Components" on page 438.
	Refresh Refreshes the display.
	The button is disabled in the Page Filter component.
	Open in a New Window Open in a New Window. Opens
	the component in a new window.
YI	<b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.
	<ul> <li>Note:</li> <li>The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.</li> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.</li> <li>Note: You can also click here in Click Here to configure it in the center</li> </ul>
0	Opens the online documentation page relevant to the component you are
	currently configuring.
<b>≈</b>	Collapse component. Collapses the component.

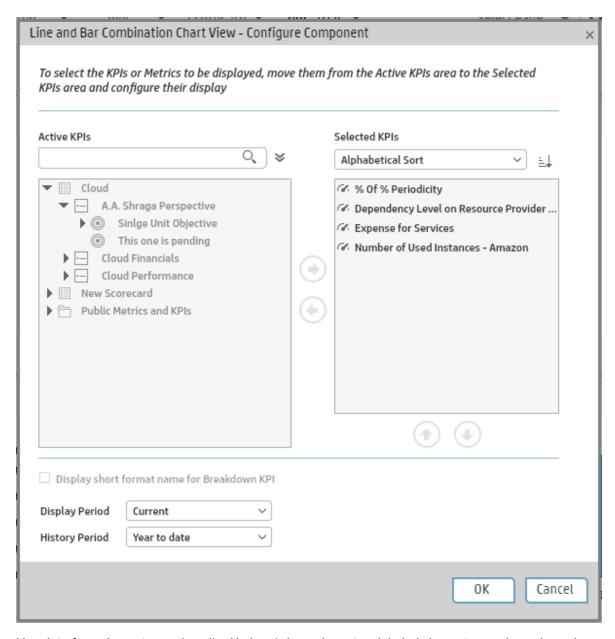
UI Element	Description
	To expand the collapsed component, click the ≥ button on the collapsed component.
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

### <Component Contents>

UI Element	Description			
<display format=""></display>	and ba	fault, the component displays details about the selected KPIs or Metrics in line ar format. For details, see "Change, On-the-fly, the Component Display Format" ge 224.		
		an also modify the format of the display of the component on the fly, by selecting evant format. Some of the formats might not be applicable.		
	The fo	The formats you can select are:		
	1	To display the contents of the component using the enriched vertical column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	45	To display the contents of the component using the horizontal Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	t≊,	To display the content using the multiple line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	44	To display the content using the pie format. For details, see "Pie format" on page 236.		
	щ	To display the content using the bar format. For details, see "Bar format" on page 235		
	mT	To display the content using the horizontal enriched column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		

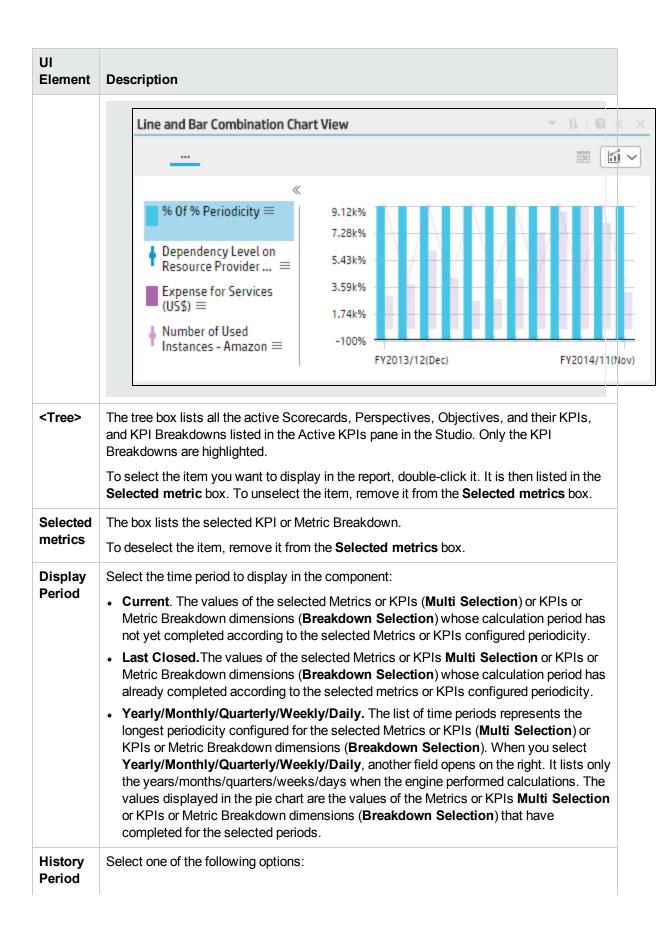
UI Element	Description		
	÷	To display the content using the vertical Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	~	To display the content using the single line graph format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	11	To display the content using the cluster bar format. For details, see "Cluster Bar format" on page 237.	
		To display the content using the stacked bar format. For details, see "Stacked Bar format" on page 239.	
	11	To display the content using the bar and line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
		To display the content using the bubble chart format. For details, see "Bubble Chart format" on page 243.	
		To display the content using the list format. For details, see "List format" on page 246.	
	For de	tails, see On-the-fly Display Format Change in Dashboard Page Components.	

Line and Bar Combination Chart View - Configure Component Dialog Box



UI Element	Description
<searc< th=""><th>Enter the relevant string to display, in the tree, only the Metrics or KPIs (or Metric or KPI Breakdowns) whose name includes the string.</th></searc<>	Enter the relevant string to display, in the tree, only the Metrics or KPIs (or Metric or KPI Breakdowns) whose name includes the string.
	In addition, the child KPIs or Metrics of the filtered items are also listed even when the child names do not include the string.
҂	Advanced Search. Opens additional fields to help you refine the component's filter:

### UI Element Description • Status: Select one of the All, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs or in the tree area. When you select **No Data**, the search returns only the elements with no data. • Type. Select: • All. To display all the elements in the Active KPIs or in the tree with the selected Status. • KPIs. To display, in the Active KPIs or in the tree, only the KPIs. • Objective. To display in the Active KPIs or in the tree, only the Objectives and their KPIs. • Metrics. To display, in the tree, only the Metrics. You can then select the relevant item if any. Active The tree box lists all the active Scorecards, Perspectives, Objectives, and their KPIs, **KPIs** and KPI Breakdowns listed in the Active KPIs pane in the Studio. The items that can be selected are highlighted. 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. Note: • If the units of the selected KPIs and Metrics are different, the Y axis is not displayed. You can view it only when you click a single item in the chart. Line and Bar Combination Chart View ▼ ĭi | @ « × ■ | 近 ~ % Of % Periodicity ≡ Dependency Level on Resource Provider ... ≡ Expense for Services (UŚ\$) ≡ Number of Used Instances - Amazon ≡ FY2013/12(Dec) FY2014/11(Nov)



UI Element	Description		
	• Quarter to date. The component'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> .		
	<ul> <li>Half a year to date. The component's display period starts 6 months prior to the current date or prior to the selected year, month, quarter, week, or day in the Display Period.</li> </ul>		
	• Year to date. The component'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> .		
	• 2 years to date. The component'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> .		
	3 years to date. The component's display period starts 3 years prior to the current date or prior to the selected year, month, quarter, week, or day in the Display Period.		
	Note:		
	<ul> <li>The leftmost point on the X-axis (beginning of the component's time frame) corresponds to the first day of the Overtime Period from the last date of the period selected in the Display Period field.</li> </ul>		
	<b>Example</b> If you select the 4th Quarter of 2013 in the <b>Display Period</b> field, and <b>3</b> years to date 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).		
	<ul> <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> </ul>		
	<ul> <li>The rightmost point on the X-axis (end of the component's time frame) corresponds to the last day of the period selected in the <b>Display Period</b> field.</li> </ul>		
	<ul> <li>If you are displaying the 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> </ul>		
	<ul> <li>If the component includes more than one chart, the X-axis spans the whole selected time frame.</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.





#### **Permissions**

**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 287.
- Historical View component . For details, see "The Historical View Component" on page 298.
- KPI View component. For details, see "The KPI View Component" on page 327.
- KPI List component . For details, see "The KPI List Component" on page 309.
- KPI Rolodex component. For details, see"KPI Rolodex Component" on page 317.
- Xcelsius Report Viewer Flash component. For details, see "The Xcelsius Reports Viewer (Flash)
   Component" on page 419.
- Web Intelligence Report Viewer component. For details, see "The Web Intelligence Report Viewer Component" on page 397.
- Pie Chart component. For details, see "The Pie Chart Component" on page 355.

You can also set up wiring between components. For additional information about wiring, see "Wiring Between Components" on page 438.

#### **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.



Main task: "Dashboard Display" on page 190

This section includes the following topics:

Add the Component to a Dashboard Page
 Filter Component in a Dashboard Page
 348

# 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 Gallery and Component Categories" on page 218.
- 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 200.

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

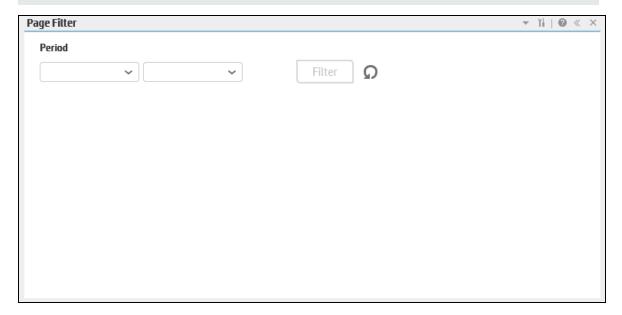
**Movie:** To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see Access Movies.



### Page Filter Component (Display) Dialog Box

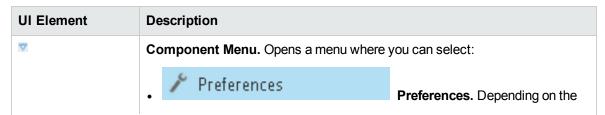
The component displays the period you can select, and the KPI/Metric Breakdowns you can select to filter the other components of the page.

**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 166 or "Metric Breakdowns" on page 172.



### Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.



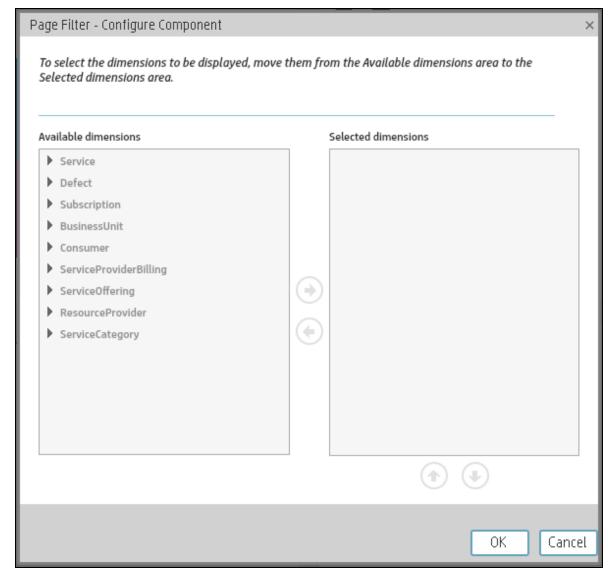
UI Element	Description		
	component you are current configuring, opens the <b><component_name></component_name> Preferences</b> dialog box where you can change the name of the component in the page by changing the name in the <b>Name</b> field and clicking <b>OK</b> .		
	component you are currently configuring where you can wire the current componed details, see "Wiring Between Componer"	ent to other components. For	
	Refresh The button is disabled in the Page Filter	Refresh. Refreshes the display.	
	🗗 Open in a New Window	Open in a New Window. Opens	
	the component in a new window.		
AT	<b>Configure Component.</b> Opens the Configure levant component. For details, see the re	,	
	Note:		
	The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.		
	<ul> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.</li> </ul>		
	Note: You can also click here in Click Hoof the component	ere to configure it in the center	
0	Opens the online documentation page relevant to the component you are currently configuring.		
*	Collapse component. Collapses the com	ponent.	
	To expand the collapsed component, click component.	the <sup>Ѡ</sup> button on the collapsed	

UI Element	Description
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

### **Component Contents**

UI Element	Description
Period	Select the display period type. It can be <b>Last Closed, Current</b> , <b>Weekly</b> , <b>Quarterly</b> , <b>Monthly</b> , or <b>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.
	Once you select one of the <b>Weekly</b> , <b>Quarterly</b> , <b>Monthly</b> , or <b>Yearly</b> display period types, another field opens where you can select the specific period corresponding to that type.
	Example If you select Quarterly, you can select FY2011/Q1, FY2011/Q2, FY2011/Q3, or FY2011/Q4.
	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> .
<entity:dimension></entity:dimension>	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.
	When a large number of entity:dimensions are selected, a scrollbar is automatically displayed.
	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> .
Filter	Click to filter the page wired components with the selections you made in the Page Filter.
Clear	Click to clear the selections you made.

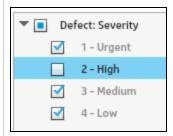
Page Filter - Configure Component Dialog Box



UI Element	Description
Available dimensions	The list of entities and dimensions corresponding to the KPI Breakdowns or Metric Breakdowns that were defined in the Studio.
Selected dimensions	The list of entities and dimensions you selected using the arrows.  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.
	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

# UI Element Description

dimension is partially filled in:







Select an entity and dimension in the Selected dimensions tree to move it up or down in the tree.

The order of the selected entities and dimensions is the order displayed in the Page Filter.

To view the information, you must have defined the correct KPI/Metric Breakdowns.

### **Example**

If the tree of KPIs and KPI Breakdowns is:

- % Attrition
  - % Attrition by Organization
    - % Attrition by Location

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 **No data**.

To prevent this problem, it is recommended to also define the other combination of entities and dimensions as follows:

- % Attrition
  - % Attrition by Organization
    - % Attrition by Location
  - % Attrition by Location

# 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.





- 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.



Main task: "Dashboard Display" on page 190

### 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** buttor
- 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 Gallery and Component Categories" on page 218.
- 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**.

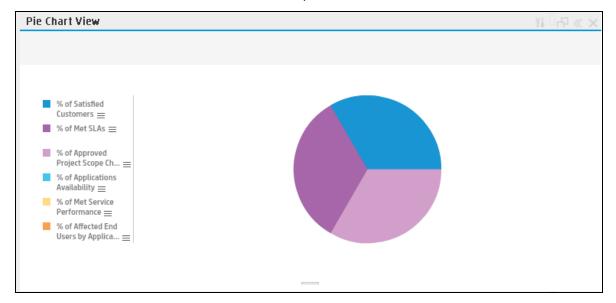
The component displays the required information.

For more information, see "Page Layout and Components" on page 200.



### **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

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description		
▽	Component Menu. Opens a menu where you can select:		
	Preferences	Preferences. Depending on the	
	component you are current configuring, opens the <b><component_name></component_name> 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> .		
	◆ Wiring	Wiring. 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 "Wiring Between Components" on page 438.		
	Refresh	Refresh. Refreshes the display.	
	The button is disabled in the Page Filter		
	• Open in a New Window	Open in a New Window. Opens	
	the component in a new window.		
AT	<b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.		
	<ul> <li>Note:</li> <li>The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.</li> </ul>		
	<ul> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.</li> </ul>		
	Note: You can also click here in Click He of the component	ere to configure it in the center	
0	Opens the online documentation page relevant to the component you are currently configuring.		
*	Collapse component. Collapses the com	ponent.	

UI Element	Description
	To expand the collapsed component, click the ≥ button on the collapsed component.
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

### **Component Contents**

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

**Note:** Some of the graphs below display thresholds. When the selected item is a Metric (that does not have thresholds), the graph displays the data without the threshold element.

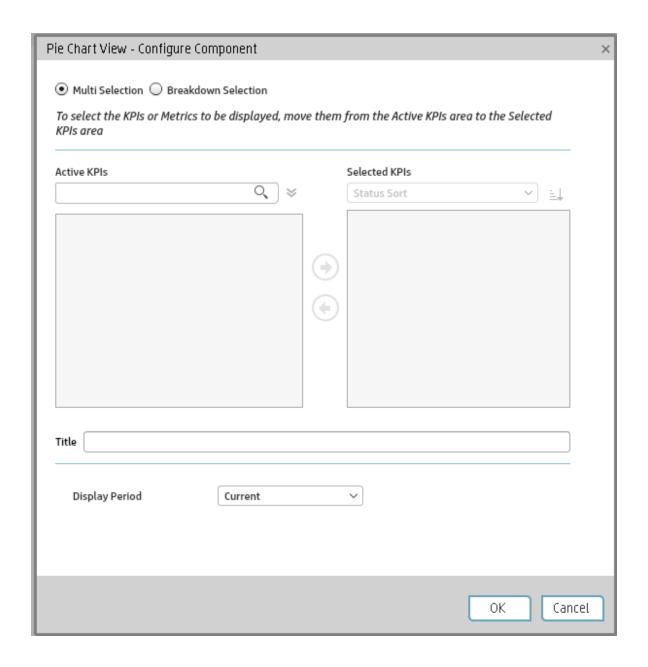
UI Element	Description
<breadcrumbs></breadcrumbs>	When you have selected a Breakdown (see below for more details), the breadcrumb displays the level of the displayed element:
	> Automation Vs. Man Defect Severity
	Click the relevant item in the breadcrumb list to go back to a previous level.
	Enables the on-demand periodicity temporary recalculation and display.
	The icon appears only for gauge, bar, or multi-line formats, and only in the following components:
	KPI Rolodex Component
	The Breakdown View Component
	The Bubble Chart View Component
	The Cluster Bar Chart View Component
	The Line and Bar Chart View Component
	The Historical Metric View Component
	The Historical View Component
	The KPI List Component
	The KPI View Component
	The Pie Chart Component
	The Stacked Bar Chart View Component
	For details, see On-demand Periodicity in Component Display.

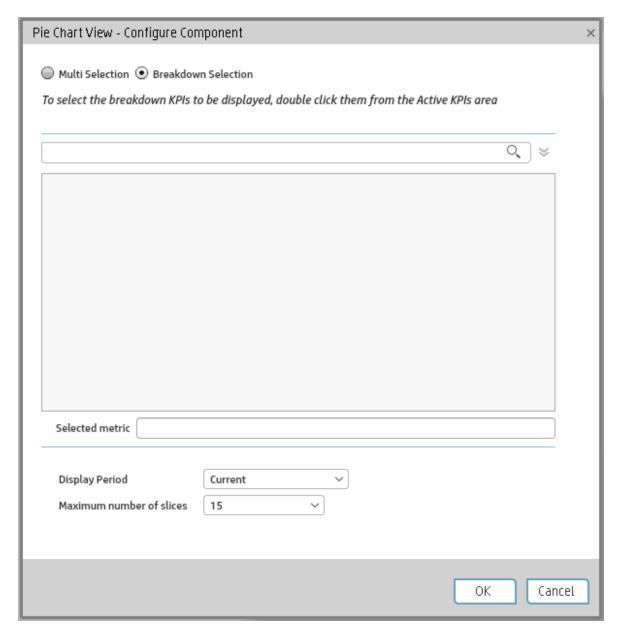
UI Element	Description		
<display format=""></display>	You can modify the format of the display of some of the components on the fly, by selecting the relevant format. Some of the formats are not applicable to some of the components.		
	The components for which you can modify the display format on-the-fly are:		
	KPI Rolodex Component		
	The Breakdown View Component		
	The Bubble Chart View Component		
	The Cluster Bar Chart View Component		
	The Line and Bar Chart View Component		
	The Historical Metric View Component		
	The Historical View Component		
	The KPI List Component		
	The KPI View Component		
	The Pie Chart Component		
	The Stacked Bar Chart View Component		
	The formats you can select are:		
	To display the contents of the component using the enriched vertical column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the contents of the component using the horizontal Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the multiple line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the pie format. For details, see "Pie format" on page 236.		
	To display the content using the bar format. For details, see "Bar format" on page 235		
	To display the content using the horizontal enriched column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	To display the content using the vertical Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		

UI Element	Description		
	~	To display the content using the single line graph format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	111	To display the content using the cluster bar format. For details, see "Cluster Bar format" on page 237.	
		To display the content using the stacked bar format. For details, see "Stacked Bar format" on page 239.	
	្ប័	To display the content using the bar and line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.	
	1.3	To display the content using the bubble chart format. For details, see "Bubble Chart format" on page 243.	
	⊞	To display the content using the list format. For details, see "List format" on page 246.	
		tails, see On-the-fly Display Format Change in Dashboard Page onents.	
<breakdowns></breakdowns>	The cursor changes from an arrow to a hand indicates that the displayed item has a Breakdown.		
	Click the displayed item to list the available Breakdowns:		
	% o	f Critical Defects ≡ Automation Vs. Manual Defects Ration ≡ Automation Vs. Manual Defects Ration with filter ≡  100 20.0 20.0	
		75.0 Defect Severity	
	2	41.5743	
	<u> </u>	25.0 0.00 0.00 0.00 0.00 0.00 0.00 0.00	
		the relevant Breakdown to display its information using the same format as	
	its par		
	You ca	an then select another format by selecting it from the <b><display format=""></display></b>	

### Pie Chart View Configure Component Dialog Box

Use the dialog box to configure the Pie Chart View component displayed in the Dashboard.





UI Element	Description	
Multi Selection/ Breakdown Selection	• <b>Multi Selection.</b> You use this option when you want to compare several metrics or KPIs. For details, see below.	
	• <b>Breakdown Selection.</b> Select this option when you want to compare the values of the selected KPI Breakdown dimension. For details, see below.	
<search></search>	Enter the relevant string to display, in the tree, only the Metrics or KPIs (or Metric or KPI Breakdowns) whose name includes the string.	
	In addition, the child KPIs or Metrics of the filtered items are also listed even when the	

UI Element	Description	
	child names do not include the string.	
*	Multi Selection	<b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:
		Status: Select one of the AII, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs or in the tree area. When you select No Data, the search returns only the elements with no data.
		Type. Select:
		All. To display all the elements in the Active KPIs or in the tree with the selected Status.
		KPIs. To display, in the Active KPIs or in the tree, only the KPIs.
		Objective. To display in the Active KPIs or in the tree, only the Objectives and their KPIs.
		Metrics. To display, in the tree, only the Metrics.
		You can then select the relevant item if any.
	Breakdown Selection	<b>Advanced Search.</b> Opens additional fields to help you refine the component's filter:
		Status: Select one of the AII, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs area. When you select No Data, the search returns only the elements with no data.  The Active Colored.
		Type. Select:  All To display in the tree all the elements.
		All. To display, in the tree, all the elements.
		KPIs. To display, in the tree, only the KPIs.
		<ul> <li>Objective. To display in the tree, only the Objectives and their KPIs.</li> </ul>
		Metrics. To display, in the tree, only the Metrics.
		You can then select the relevant KPI or Metric Breakdown if any.
Active	Displayed only	when you select <b>Multi Selection</b> .
KPIs	and KPI Breakd be selected are	s all the active Scorecards, Perspectives, Objectives, and their KPIs, owns listed in the Active KPIs pane in the Studio. The items that can highlighted (if you have selected <b>Breakdown selection</b> , only the s are highlighted).

UI Element	Description
	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.
	<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.
Selected	Displayed only when you select Multi Selection.
KPIs	The box lists all the selected metrics or KPIs that you want to display in the component.
	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.
	<status sort=""></status>
	• Status sort to sort the selected elements in status 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: ☞ □.
	• <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:  □ □ □.
<tree> Displayed only when you select Breakdown Selection.</tree>	
	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.
	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.
Title	Displayed only when you select <b>Multi Selection</b> .
	Enter the title of the component in the Dashboard page.
Selected	Displayed only when you select Breakdown Selection.
metrics	The box lists the selected KPI or Metric Breakdowns.
	To deselect the item, remove it from the <b>Selected metrics</b> box.
Display	Select the time period to display in the component:
Period	<ul> <li>Current. The values of the selected Metrics or KPIs (Multi Selection) or KPIs or Metric Breakdown dimensions (Breakdown Selection) whose calculation period has not yet completed according to the selected Metrics or KPIs configured periodicity.</li> </ul>
	• Last Closed. The values of the selected Metrics or KPIs Multi Selection or KPIs

UI Element	Description
	or Metric Breakdown dimensions ( <b>Breakdown Selection</b> ) whose calculation period has already completed according to the selected metrics or KPIs configured periodicity.
	Yearly/Monthly/Quarterly/Weekly/Daily. The list of time periods represents the longest periodicity configured for the selected Metrics or KPIs (Multi Selection) or KPIs or Metric Breakdown dimensions (Breakdown Selection). When you select Yearly/Monthly/Quarterly/Weekly/Daily, 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 Multi Selection or KPIs or Metric Breakdown dimensions (Breakdown Selection) that have completed for the selected periods.
Maximum number of slices	• 2. 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.
	• 3, 4, 5, 6, 7, 8, 9, 10, 15. 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.

# 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.





- 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.



Main task: "Dashboard Display" on page 190

## 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.
- 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.

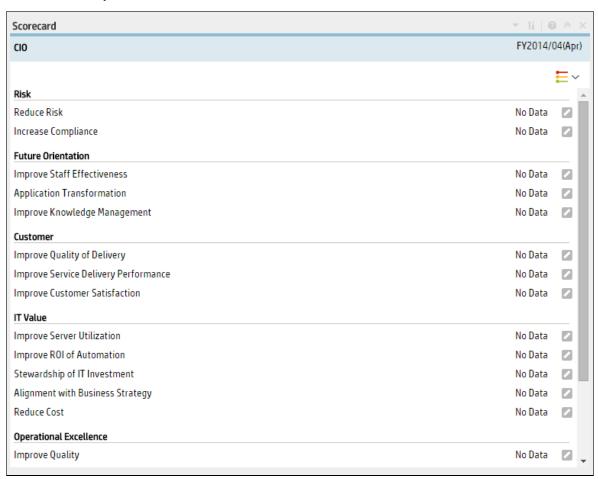
- If the target area is hidden by the Component Gallery dialog box, click the Component Gallery dialog box title bar and drag it to another location on your screen.
- If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of 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 Gallery and Component Categories" on page 218.
- 5. In the component, click the **Configure Component** 11 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 200.



#### **Scorecard Component**



## Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description
▼	Component Menu. Opens a menu where you can select:
	Preferences Preferences. Depending on the
	component you are current configuring, opens the <b><component_name></component_name> 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> .
	• Wiring. 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 "Wiring Between Components" on page 438.
	Refresh. Refreshes the display.
	The button is disabled in the Page Filter component.
	Open in a New Window Open in a New Window. Opens
	the component in a new window.
YI	<b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.
	Note:
	<ul> <li>The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.</li> </ul>
	<ul> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.</li> </ul>
	<b>Note:</b> You can also click <b>here</b> in <b>Click Here to configure it</b> in the center of the component

UI Element	Description
0	Opens the online documentation page relevant to the component you are currently configuring.
*	Collapse component. Collapses the component.
	To expand the collapsed component, click the <sup>™</sup> button on the collapsed component.
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

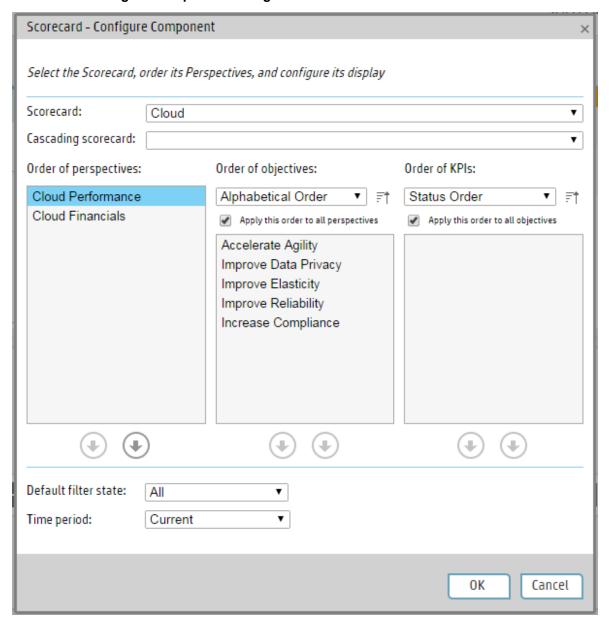
### <Component Contents>

UI Element	Description
<component< th=""><th>The following information is displayed, from left to right:</th></component<>	The following information is displayed, from left to right:
contents>	The name of the Scorecard. Double-click the name to open the EXPLORER tab filtered for the selected element.
	The timestamp of the Scorecard. It displays the period you selected in the <b>Time Period</b> box in the Scorecard - Configure Component Dialog Box.  FY2014/04(Apr)
	V 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).

## **UI Element Description** Scorecard VP Applications 🗸 Financial Planning and Analysis Secured IT Reduce Risk ≡ The name of the Perspective you selected in the Scorecard - Component Filter dialog box. For details, see "The Scorecard Component" on page 366. • The Perspective's Objectives, sorted by status (with the error status first) with: • The score of the Objective. • $\equiv$ (or $\stackrel{*=}{=}$ 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 "First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 464. The trend icon that indicates the trend of the Objective over the display period. • The status of the Objective during the display period. It can be: indicates that the status is Good. indicates that the status is Warning. 🛂 indicates that the status is Error. indicates that status was not calculated or that there was an error in the calculation. Click the button in the top right corner of the Scorecard and select the relevant status: to display all the Objectives with any Status. to display only the Objectives with an Error Status. to display only the Objectives with a Warning status. The default selection is configured in the **Default filter state** field in the Scorecard -Component Filter dialog box. For details, see "The Scorecard Component" on page 366.

UI Element	Description
<tooltip></tooltip>	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 "First Level Navigation (FLN) for an Objective, a KPI, or a Metric" on page 464.

#### **Scorecard - Configure Component Dialog Box**



UI Element	Description	
Scorecard	Select the Scorecard you want to display in the component.	
	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.	
	The list of the Scorecard's Perspectives, Objectives, and KPIs are displayed in the Order of Perspectives, Order of Objectives, and Order of KPIs areas.	
Cascading scorecard	If the selected Scorecard has Cascading Scorecards, you can select a Cascading Scorecard in the Cascading Scorecard list that is permitted for your user. For details about permissions, see User Management in the <i>IT Executive Scorecard Administrator Guide</i> .	
	The Perspectives, Objectives, and KPIs of the selected Cascading Scorecard are then listed in the lower part of the dialog box, and you can select their orders as described below.	
Order of perspectives	Select a Perspective and use at the bottom of the area to order the Perspectives as you want to display them in the Scorecard component in the Dashboard page.	
	If needed, once you have selected the order of Perspectives, click each Perspective and order its Objectives in the <b>Order of Objectives</b> area.	
Order of objectives	Select how to display the Objectives in the Scorecard component in the Dashboard page.	
	Status Order. Select to sort the Objectives by status. This is the default. Click লাঘ to select the ascending or descending order.	
	Alphabetical Order. Select to sort the Objectives in alphabetical order. Click লাঘ to select the ascending or descending order.	
	Manual Order. Select to sort the Objectives manually. Use at the bottom of the area to order the Objectives as you want to display them in the Scorecard component in the Dashboard.	
	<b>Apply this order to all perspectives.</b> If needed, select this option to apply the order you selected for the set of Objectives of the Perspective currently selected, to all the Objectives of all the Perspectives of the Scorecard.	
	If needed, once you have selected the order of Objectives, click each Objective and order its KPIs in the <b>Order of KPIs</b> area.	
Order of KPIs	Select how to display the KPIs in the KPI View components wired to the Scorecard component in the Dashboard page.	

UI Element	Description
	Status Order. Select to sort the KPIs by status. This is the default. Click to select the ascending or descending order.
	Alphabetical Order. Select to sort the KPIs in alphabetical order. Click লাঘ to select the ascending or descending order.
	Manual Order. Select to sort the KPIs manually. Use at the bottom of the area to order the KPIs as you want to display them in the components wired to the Scorecard component in the Dashboard page.
	Apply this order to all Objectives. If needed, select this option to apply the order you selected for the set of KPIs currently displayed to all the KPIs of all the Objectives of the Scorecard. This sorting includes the KPIs of child Objectives of the Objectives of the Scorecard.
Default filter state	Select the icon that is automatically selected in the Scorecard display:  • All
	Critical and Warning Critical
Time period	Select the time period to be displayed in the component:
	• <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.
	• Last Closed. 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.
	Yearly. When you select Yearly 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.
	• Quarterly. When you select Quarterly 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.
	Monthly. When you select Monthly 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.

## **UI Element** Description 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. • Weekly. When you select Weekly 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. 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. • Daily. When you select Daily 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. 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. Note: . If you select the Current Time Period, each Objective displays the results of its current period. • If you select the Last Closed Time Period, each Objective displays the results corresponding to its last closed period. • 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. 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.

# The Stacked Bar Chart View Component

The Stacked Bar Chart View component displays the list of selected KPIs or Metrics, and their value, trend, and status for the measurement period in stacked bar format, by default.

#### 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.





- 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.



Main task: "Dashboard Display" on page 190

## 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.
- 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 Gallery and Component Categories" on page 218.
- 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 200.



#### **Stacked Bar Chart View Component**



#### Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description	
▽	Component Menu. Opens a menu where	you can select:
	Preferences	Preferences. Depending on the
	component you are current configuring, or <b>Preferences</b> dialog box where you can or in the page by changing the name in the	opens the <b><component_name></component_name></b> change the name of the component
	◆ Wiring	Wiring. Depending on the
	component you are currently configuring where you can wire the current componed details, see "Wiring Between Componer"	, opens the Wiring dialog box ent to other components. For
	Refresh	Refresh. Refreshes the display.
	The button is disabled in the Page Filter	
	• Open in a New Window	Open in a New Window. Opens
	the component in a new window.	
AT	<b>Configure Component.</b> Opens the Configure relevant component. For details, see the relevant component.	
	Note:  • The button is disabled in the Breakdow component is filtered by the relevant at on the same Dashboard page. When y wired KPI View, Historical View, or Ro Breakdown View component displays KPI Breakdown for the selected KPI.	utomatically wired components ou select an item in one of these blodex components, the
	The button is disabled in the Forecast of filtered by the relevant automatically we Dashboard page. When you select an Historical View, the Forecast component the selected KPI.	rired components on the same item in one of these wired
	Note: You can also click here in Click He of the component	ere to configure it in the center
0	Opens the online documentation page relev currently configuring.	ant to the component you are
*	Collapse component. Collapses the com	ponent.

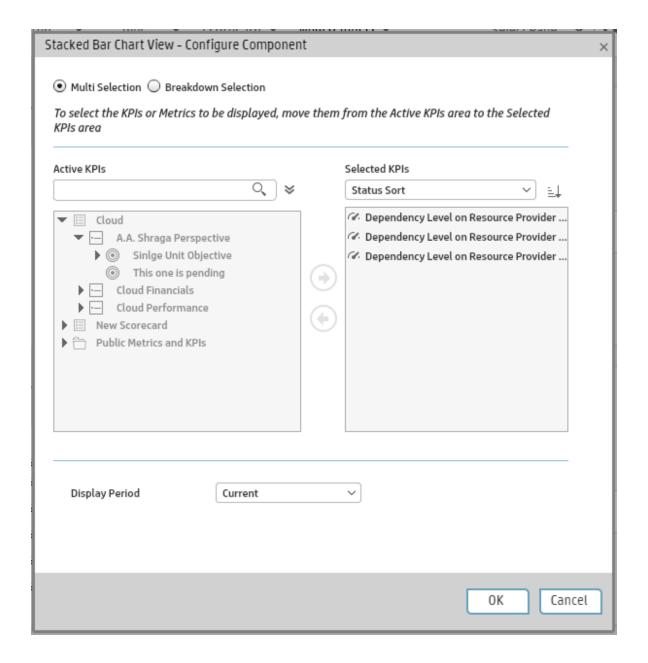
UI Element	Description
	To expand the collapsed component, click the <sup>™</sup> button on the collapsed component.
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

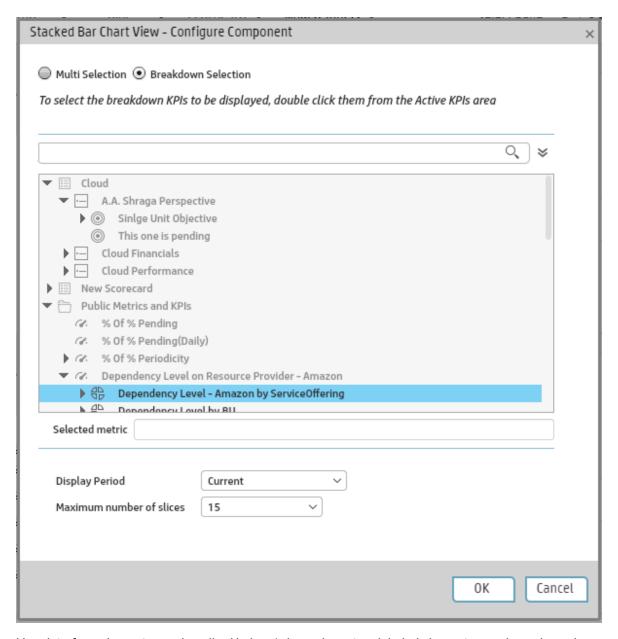
#### <Component Contents>

UI Element	Descr	Description		
<display format=""></display>		fault, the component displays details about the selected KPIs or Metrics in ed bar format. For details, see "Stacked Bar format" on page 239.		
(4) V		an also modify the format of the display of the component on the fly, by ing the relevant format. Some of the formats may not be applicable.		
	The fo	rmats you can select are:		
	Fill I	To display the contents of the component using the enriched vertical column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	ďλ	To display the contents of the component using the horizontal Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	₺	To display the content using the multiple line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	95	To display the content using the pie format. For details, see "Pie format" on page 236.		
	щ	To display the content using the bar format. For details, see "Bar format" on page 235		
	mř	To display the content using the horizontal enriched column format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.		
	€	To display the content using the vertical Rolodex or gauge format. For details, see "Change, On-the-fly, the Component Display Format" on		

UI Element	Descr	iption
		page 224.
	~	To display the content using the single line graph format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	111	To display the content using the cluster bar format. For details, see "Cluster Bar format" on page 237.
		To display the content using the stacked bar format. For details, see "Stacked Bar format" on page 239.
	<u>11</u>	To display the content using the bar and line format. For details, see "Change, On-the-fly, the Component Display Format" on page 224.
	.*	To display the content using the bubble chart format. For details, see "Bubble Chart format" on page 243.
		To display the content using the list format. For details, see "List format" on page 246.
		tails, see On-the-fly Display Format Change in Dashboard Page onents.

Stacked Bar Chart View - Configure Component Dialog Box





UI Element	Description		
Multi Selection/	• <b>Multi Selection.</b> You use this option when you want to compare several metrics or KPIs. For details, see below.		
Breakdown Selection	Breakdown Selection. Select this option when you want to compare the values of the selected KPI Breakdown dimension. For details, see below.		
<search></search>	Enter the relevant string to display, in the tree, only the Metrics or KPIs (or Metric or KPI Breakdowns) whose name includes the string.		
	In addition, the child KPIs or Metrics of the filtered items are also listed even when the		

UI Element	Description	
	child names do	not include the string.
*	Multi Selection	<ul> <li>Advanced Search. Opens additional fields to help you refine the component's filter:</li> <li>Status: Select one of the All, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs or in the tree area. When you select No Data, the search returns only the elements with no data.</li> <li>Type. Select: <ul> <li>All. To display all the elements in the Active KPIs or in the tree with the selected Status.</li> </ul> </li> <li>KPIs. To display, in the Active KPIs or in the tree, only the KPIs.</li> <li>Objective. To display in the Active KPIs or in the tree, only the Objectives and their KPIs.</li> </ul>
		Metrics. To display, in the tree, only the Metrics.  You can then select the relevant item if any.
	Breakdown Selection	<ul> <li>Advanced Search. Opens additional fields to help you refine the component's filter:</li> <li>Status: Select one of the AII, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs area. When you select No Data, the search returns only the elements with no data.</li> <li>Type. Select: <ul> <li>AII. To display, in the tree, all the elements.</li> </ul> </li> </ul>
		<ul> <li>KPIs. To display, in the tree, only the KPIs.</li> <li>Objective. To display in the tree, only the Objectives and their KPIs.</li> <li>Metrics. To display, in the tree, only the Metrics.</li> <li>You can then select the relevant KPI or Metric Breakdown if any.</li> </ul>
Active KPIs	The tree box list and KPI Breakd be selected are	when you select <b>Multi Selection</b> .  s all the active Scorecards, Perspectives, Objectives, and their KPIs, owns listed in the Active KPIs pane in the Studio. The items that can highlighted (if you have selected <b>Breakdown selection</b> , only the s are highlighted).

UI Element	Description
	To select or deselect the elements you want to display in the report, use the right and left arrows $\textcircled{-}$ 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.
	<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.
Selected	Displayed only when you select <b>Multi Selection</b> .
KPIs	The box lists all the selected metrics or KPIs that you want to display in the component.
	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.
	<status sort=""></status>
	• Status sort to sort the selected elements in status 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:
	• <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:
<tree></tree>	Displayed only when you select Breakdown Selection.
	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.
	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.
Selected	Displayed only when you select <b>Breakdown Selection</b> .
metrics	The box lists the selected KPI or Metric Breakdown.
Display	Select the time period to display in the component:
Period	<ul> <li>Current. The values of the selected Metrics or KPIs (Multi Selection) or KPIs or Metric Breakdown dimensions (Breakdown Selection) whose calculation period has not yet completed according to the selected Metrics or KPIs configured periodicity.</li> </ul>
	<ul> <li>Last Closed. The values of the selected Metrics or KPIs Multi Selection or KPIs or Metric Breakdown dimensions (Breakdown Selection) whose calculation period has already completed according to the selected metrics or KPIs configured periodicity.</li> </ul>
	Yearly/Monthly/Quarterly/Weekly/Daily. The list of time periods represents the

UI Element	Description
	longest periodicity configured for the selected Metrics or KPIs (Multi Selection) or KPIs or Metric Breakdown dimensions (Breakdown Selection). When you select Yearly/Monthly/Quarterly/Weekly/Daily, 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 Multi Selection or KPIs or Metric Breakdown dimensions (Breakdown Selection) that have completed for the selected periods.
Maximum	This field is displayed only when you select <b>Breakdown Selection</b> .
Number of Slices	• 2. The item with the highest value is represented by a bubble. The 3 items with the next highest values are represented by the other bubble. A tooltip displays the details of these 3 items.
	• 3, 4, 5, 6, 7, 8, 9, 10, 15. The item with the highest value is represented by a bubble. Depending on the selected number of bubbles, each one of the other bubbles corresponds to the item with the next highest value. The last bubble represents the 3 items with the next highest values. A tooltip displays the details of these 3 items.

# 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. SWF files have a **.swf** suffix.

#### 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.





**Tip:** 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.

**Note:** You cannot wire a SWF Reports Viewer (Flash) component with a Page Filter component in a Dashboard page.



Main task: "Dashboard Display" on page 190

This section includes the following topics:

## Add a Component to a Dashboard Page

**Note:** To view a list of the available SWF files, you must copy the reports .**swf** files to the following location:

<HP\_XS>\agora\xcelsius directory.

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).





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 Gallery and Component Categories" on page 218.
- 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 200.

# 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.
- 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



### **SWF Report Viewer Component**

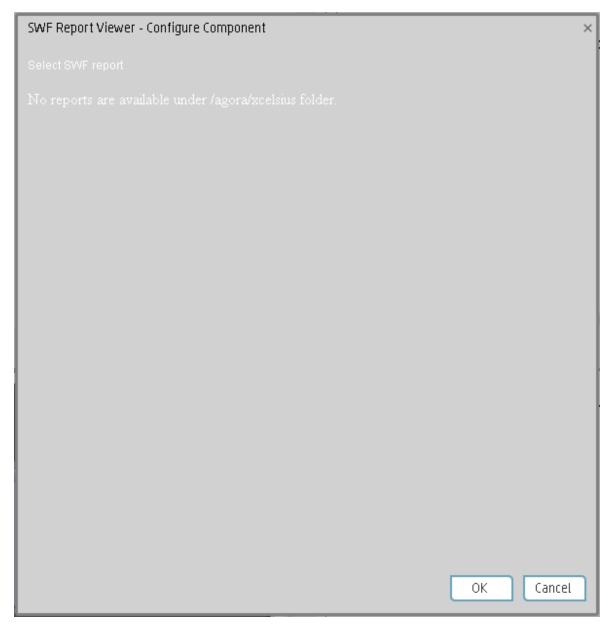
## Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description
▽	Component Menu. Opens a menu where you can select:
	• Preferences  Preferences. Depending on the component you are current configuring, opens the <component_name> Preferences dialog box where you can change the name of the component in the page by changing the name in the Name field and clicking OK.</component_name>
	• Wiring. 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 "Wiring Between Components" on page 438.
	Refresh. Refreshes the display. The button is disabled in the Page Filter component.  Open in a New Window  Open in a New Window. Opens
Yi	the component in a new window.  Configure Component. Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.
	<ul> <li>Note:</li> <li>The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.</li> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same</li> </ul>

UI Element	Description
	Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.
	Note: You can also click here in Click Here to configure it in the center of the component
0	Opens the online documentation page relevant to the component you are currently configuring.
<b>*</b>	Collapse component. Collapses the component.
	To expand the collapsed component, click the <sup>™</sup> button on the collapsed component.
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

SWF Report Viewer - Configure Component Dialog Box



UI Element	Description
<report list=""></report>	Select the SWF file you want to display in the SWF Report Viewer component.

# The US Map Component

The US Map components display the status, value, and trend of a KPI or the value of a Metric on a United States of America map. The KPI or Metric must have a Breakdown by State.

#### 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.





- 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.

#### Wiring to other components

The World Map or the US Map component is automatically wired to the KPI View component. For details, see "The KPI View Component" on page 327.



#### This section includes:

•	Prerequisites	.390
•	Add a Component to a Dashboard Page	.391
•	Display the data in map format	. 391

## Prerequisites

To enjoy the capabilities of the US Map component:

• The KPI or Metric must have breakdown by State.

- You must add a KPI View component to the page. The US Map component is automatically wired to the KPI View. This means that when you click a KPI in the KPI View, its breakdowns values are displayed in the US Map component.
- The names of the States you are using for the KPI or Metric Breakdown per State must have standard names corresponding to the States used in the map.

# Add a Component to a Dashboard Page

In a Dashboard page, add the KPI View component and the relevant World Map/US Map component. For details on how to add a component to a page, see the procedure below.

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 Gallery and Component Categories" on page 218.
- 5. In the component, click the Configure Component 11 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**.

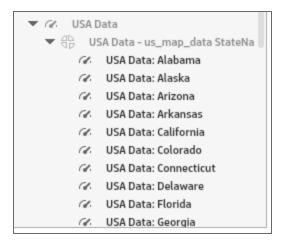
The component displays the required information.

For more information, see "Page Layout and Components" on page 200.

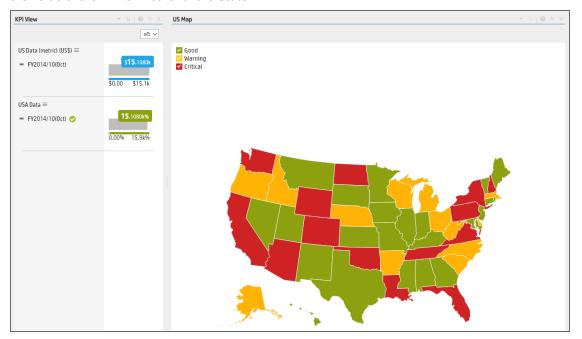
## Display the data in map format

In the Dashboard page you created:

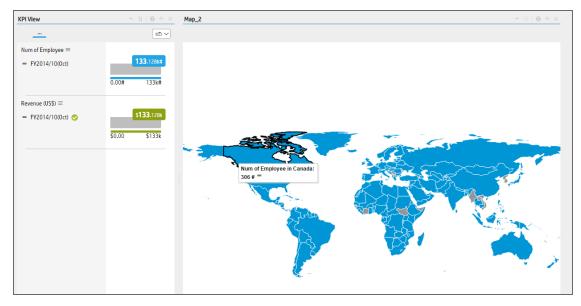
1. In the KPI View component, click if and select the relevant KPI or Metric and save. The KPI or Metric must have breakdown by State. For example:



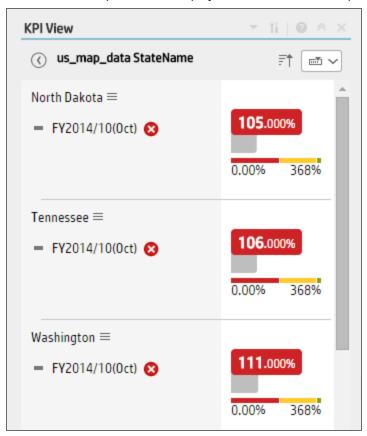
In the Dashboard page, in the KPI View component, click the relevant KPI or Metric.
 If the KPI has a Breakdown by State, the US Map component displays the color corresponding to the value of the KPI or Metric for the State.



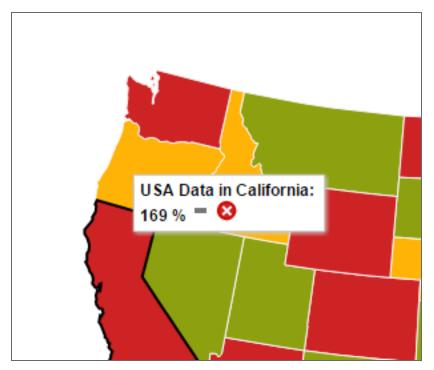
If the Metric has a Breakdown by State, the US Map component displays the State with a blue background when the Metric has a value for the State or gray when there is no data for the State.



Note that when you click the KPI or Metric in the KPI View, the corresponding list of KPI Breakdowns per State is displayed in the KPI View component.



3. In the US Map component, hover above the relevant State to display a tooltip that provides details about the KPI or Metric.



The US Map component legend provides details about the meaning of the colors:



# Reference

Only the English names of the States are supported. They must correspond to the list below:

- Alabama
- Alaska
- Arizona
- Arkansas
- California
- Colorado
- Connecticut
- Delaware
- Florida
- Georgia

- Hawaii
- Idaho
- Illinois
- Indiana
- lowa
- Kansas
- Kentucky
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Missouri
- Montana
- Nebraska
- Nevada
- New Hampshire
- New Jersey
- New Mexico
- New York
- North Carolina
- North Dakota
- Ohio
- Oklahoma
- Oregon
- Pennsylvania
- · Rhode Island
- South Carolina
- · South Dakota
- Tennessee
- Texas
- Utah
- Vermont
- Virginia
- Washington
- West Virginia

- Wisconsin
- Wyoming

## 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.





**Tip:** 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.

#### Impact of the size of Web Intelligence reports

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 in the *IT Executive Scorecard Reports Reference Guide*.



Main task: "Dashboard Display" on page 190

This section includes the following tasks:

## 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 Gallery and Component Categories" on page 218.
- 5. In the component, click the **Configure Component** to 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 200.

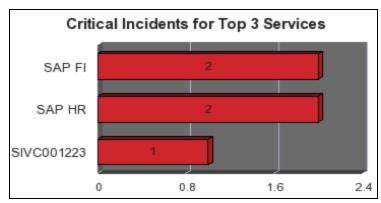
# Wire the Web Intelligence Report Viewer component to the Page Filter component

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 347.



### Web Intelligence Report Viewer Component



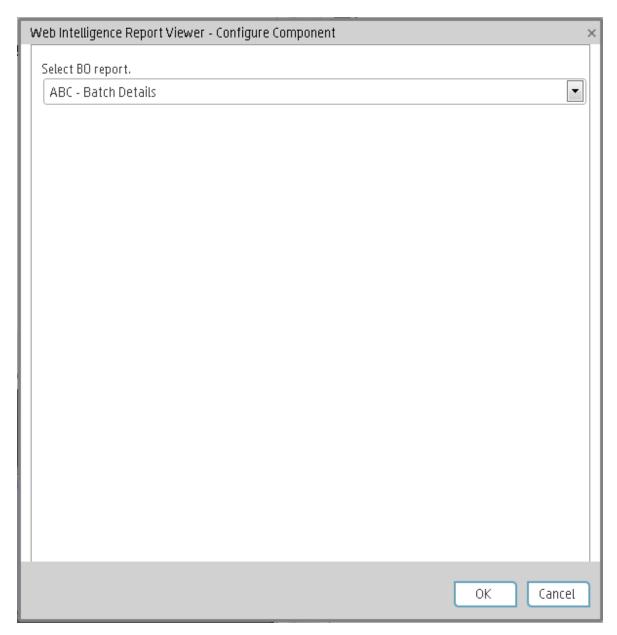
### Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description
▼	Component Menu. Opens a menu where you can select:
	• Preferences  Preferences. Depending on the component you are current configuring, opens the <component_name> Preferences dialog box where you can change the name of the component in the page by changing the name in the Name field and clicking OK.</component_name>
	<ul> <li>Wiring. 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 "Wiring Between Components" on page 438.</li> <li>Refresh</li> <li>Refresh. Refreshes the display. The button is disabled in the Page Filter component.</li> </ul>
Yi	• Open in a New Window the component in a new window.  Configure Component. Opens the Configure Component dialog box for the
	relevant component. For details, see the relevant section below.
	<ul> <li>Note:</li> <li>The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.</li> <li>The button is disabled in the Forecast component, as the component is</li> </ul>
	filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.  Note: You can also click here in Click Here to configure it in the center of the component

UI Element	Description
0	Opens the online documentation page relevant to the component you are currently configuring.
<b>*</b>	Collapse component. Collapses the component.
	To expand the collapsed component, click the <sup>™</sup> button on the collapsed component.
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

Web Intelligence Report Viewer - Configure Component Dialog Box



UI Element	Description
<report list=""></report>	Select the BO report you want to display in the Web Intelligence Report Viewer component. For details about the reports, see Getting Started with Reports in the IT Executive Scorecard Reports Reference Guide.

# 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.





#### **About BO reports**

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:

<HP\_XS>\agora\xcelsius directory.

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.

#### Impact of the size of Web Intelligence reports

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 in the *IT Executive Scorecard Reports Reference Guide*.



Main task: "Dashboard Display" on page 190

### 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.

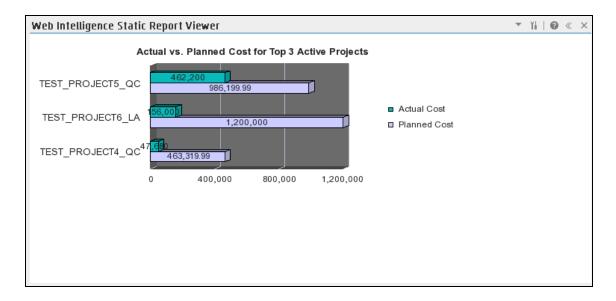
- If the target area is hidden by the Component Gallery dialog box, click the Component Gallery dialog box title bar and drag it to another location on your screen.
- If you are dragging a new component to a target area that already has a component defined, drag the new component to the title bar of 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 Gallery and Component Categories" on page 218.
- 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 200.



Web Intelligence Static Report Component Viewer (Display)



### **Component Toolbar**

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.

UI Element	Description	
▼	Component Menu. Opens a menu where	you can select:
	Preferences component you are current configuring,	Preferences. Depending on the opens the <component_name></component_name>
	Preferences dialog box where you can din the page by changing the name in the	change the name of the component
	· Wiring	Wiring. Depending on the
	component you are currently configuring where you can wire the current componed details, see "Wiring Between Componer"	, opens the Wiring dialog box ent to other components. For
	Refresh	<b>Refresh.</b> Refreshes the display.
	The button is disabled in the Page Filter	. ,
	. 🗗 Open in a New Window	Open in a New Window. Opens
	the component in a new window.	
YI	Configure Component. Opens the Config	gure Component dialog box for the

UI Element	Description
	relevant component. For details, see the relevant section below.
	Note:  • The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these
	wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.
	<ul> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.</li> </ul>
	Note: You can also click here in Click Here to configure it in the center of the component
0	Opens the online documentation page relevant to the component you are currently configuring.
*	Collapse component. Collapses the component.
	To expand the collapsed component, click the $\text{\tiny $\!$
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. 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.



UI Element	Description
<report list=""></report>	Select the BO report you want to display in the Web Intelligence Static Report Component Viewer component. For details about the reports, see Getting Started with Reports in the <i>IT Executive Scorecard Reports Reference Guide</i> .

# The World Map Component

The World Map component displays the status, value, and trend of a KPI or the value of a Metric on a world map. The KPI or Metric must have a Breakdown by country.

#### 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.





- 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.

#### Wiring to other components

The World Map or the US Map component is automatically wired to the KPI View component. For details, see "The KPI View Component" on page 327.



#### This section includes:

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•	Add a Component to a Dashboard Page	408
•	Display the data in map format	. 408

### Prerequisites

To enjoy the capabilities of the World Map component:

• The KPI or Metric must have breakdown per country.

- You must add a KPI View component to the page. The World Map component is automatically wired
  to the KPI View. This means that when you click a KPI in the KPI View, its breakdowns values are
  displayed in the World Map component.
- The names of the countries you are using for the KPI or Metric Breakdown per country must have standard names corresponding to the country names used in the maps.

### Add a Component to a Dashboard Page

In a Dashboard page, add the KPI View component and the relevant World Map component. For details on how to add a component to a page, see the procedure below.

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 Gallery and Component Categories" on page 218.
- 5. In the component, click the Configure Component 11 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 200.

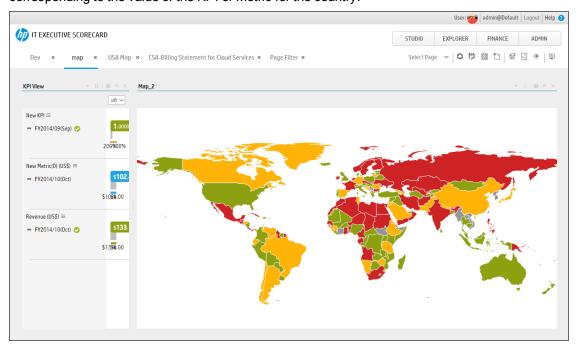
### Display the data in map format

In the Dashboard page you created:

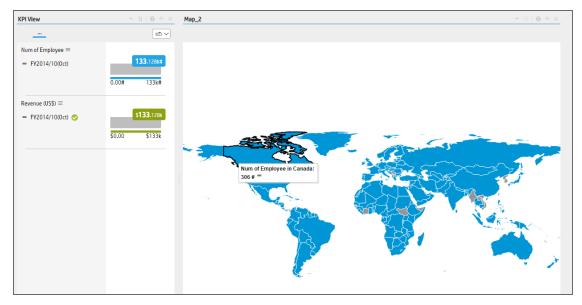
1. In the KPI View component, click if and select the relevant KPI or Metric and save. The KPI or Metric must have breakdown per country. For example:



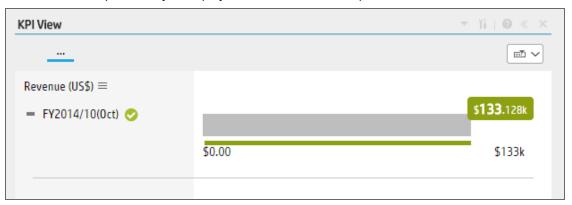
2. In the Dashboard page, in the KPI View component, click the relevant KPI or Metric. If the KPI has a Breakdown by country, the World Map component displays the color corresponding to the value of the KPI or Metric for the country.



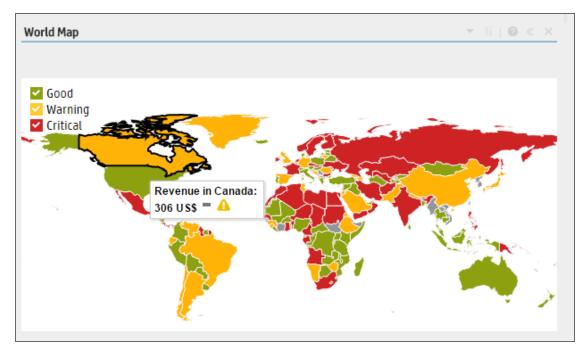
If the Metric has a Breakdown by country, the World Map component displays the country with a blue background when the Metric has a value for the country or gray when there is no data for the country.



Note that when you click the KPI or Metric in the KPI View, the corresponding list of KPI Breakdowns per country is displayed in the KPI View component.



3. In the World Map component, hover above the relevant country to display a tooltip that provides details about the KPI or Metric.



The World Map component legend provides details about the meaning of the colors:



# Reference

Only the English names of the countries are supported. They must correspond to the list below:

- Afghanistan
- Akrotiri
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda
- Argentina

- Armenia
- Aruba
- · Ashmore and Cartier Islands
- Australia
- Austria
- Azerbaijan
- · Bahamas, The
- Bahrain
- Bangladesh
- Barbados
- · Bassas da India
- Belarus
- Belgium
- Belize
- Benin
- Bermuda
- Bhutan
- Bolivia
- Bosnia and Herzegovina
- Botswana
- Bouvet Island
- Brazil
- British Indian Ocean Territory
- British Virgin Islands
- Brunei
- Bulgaria
- Burkina Faso
- Burma
- Burundi
- Cambodia
- Cameroon
- Canada
- · Cape Verde
- Cayman Islands
- Central African Republic
- Chad
- Chile
- China

- · Christmas Island
- Clipperton Island
- Cocos (Keeling) Islands
- Colombia
- Comoros
- Democratic Republic of the Congo
- Republic of the Congo
- · Cook Islands
- · Coral Sea Islands
- Costa Rica
- Cote d'Ivoire
- Croatia
- Cuba
- Cyprus
- Czech Republic
- Denmark
- Dhekelia
- · Djibouti
- Dominica
- Dominican Republic
- Ecuador
- Egypt
- El Salvador
- · Equatorial Guinea
- Eritrea
- Estonia
- Ethiopia
- Europa Island
- Falkland Islands (Islas Malvinas)
- Faroe Islands
- Fiji
- Finland
- France
- French Guiana
- French Polynesia
- French Southern and Antarctic Lands
- Gabon
- · Gambia, The

- Gaza Strip
- Georgia
- Germany
- Ghana
- Gibraltar
- Glorioso Islands
- Greece
- Greenland
- Grenada
- Guadeloupe
- Guam
- Guatemala
- Guernsey
- Guinea
- Guinea-Bissau
- Guyana
- Haiti
- · Heard Island and McDonald Islands
- Holy See (Vatican City)
- Honduras
- Hong Kong
- Hungary
- Iceland
- India
- Indonesia
- Iran
- Iraq
- Ireland
- · Isle of Man
- Israel
- Italy
- Jamaica
- Jan Mayen
- Japan
- Jersey
- Jordan
- Juan de Nova Island
- Kazakhstan

- Kenya
- Kiribati
- · Korea, North
- · Korea, South
- Kuwait
- Kyrgyzstan
- Laos
- Latvia
- Lebanon
- · Lesotho
- Liberia
- Libya
- Liechtenstein
- Lithuania
- Luxembourg
- Macau
- Macedonia
- Madagascar
- Malawi
- Malaysia
- Maldives
- Mali
- Malta
- Marshall Islands
- Martinique
- Mauritania
- Mauritius
- Mayotte
- Mexico
- · Micronesia, Federated States of
- Moldova
- Monaco
- Mongolia
- Montserrat
- Morocco
- Mozambique
- Namibia
- Nauru

- Navassa Island
- Nepal
- Netherlands
- · Netherlands Antilles
- · New Caledonia
- New Zealand
- Nicaragua
- Niger
- Nigeria
- Niue
- · Norfolk Island
- Northern Mariana Islands
- Norway
- Oman
- Pakistan
- Palau
- Panama
- · Papua New Guinea
- Paracel Islands
- Paraguay
- Peru
- Philippines
- Pitcairn Islands
- Poland
- Portugal
- Puerto Rico
- Qatar
- Reunion
- Romania
- Russia
- Rwanda
- Saint Helena
- · Saint Kitts and Nevis
- · Saint Lucia
- · Saint Pierre and Miquelon
- · Saint Vincent and the Grenadines
- Samoa
- San Marino

- Sao Tome and Principe
- Saudi Arabia
- Senegal
- Serbia and Montenegro
- Seychelles
- · Sierra Leone
- Singapore
- Slovakia
- Slovenia
- Solomon Islands
- Somalia
- South Africa
- South Georgia and the South Sandwich Islands
- Spain
- Spratly Islands
- Sri Lanka
- Sudan
- Suriname
- Svalbard
- Swaziland
- Sweden
- Switzerland
- Syria
- Taiwan
- Tajikistan
- United Republic of Tanzania
- Thailand
- Timor-Leste
- Togo
- Tokelau
- Tonga
- · Trinidad and Tobago
- Tromelin Island
- Tunisia
- Turkey
- Turkmenistan
- Turks and Caicos Islands
- Tuvalu

- Uganda
- Ukraine
- United Arab Emirates
- United Kingdom
- United States
- Uruguay
- Uzbekistan
- Vanuatu
- Venezuela
- Vietnam
- Virgin Islands
- Wake Island
- · Wallis and Futuna
- West Bank
- Western Sahara
- Yemen
- Zambia
- Zimbabwe

# 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.



### 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 Metric Breakdown Report in the *IT Executive Scorecard Reports Reference Guide*.



Main task: "Dashboard Display" on page 190

This section includes the following tasks:

- Prerequisite Make sure the Xcelsius component works properly
- Add the Component to a Dashboard Page ......421
- Create your own Flash report to be displayed in the Xcelsius Reports Viewer (Flash) Component 422

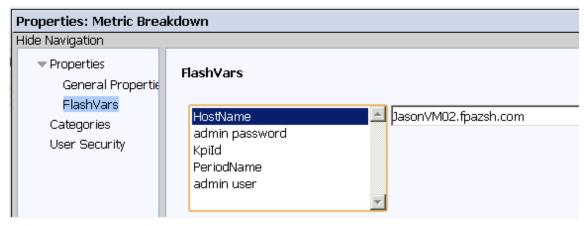
# Prerequisite - Make sure the Xcelsius component works properly

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 installations for Development, Test, and Production environments. 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.dtd">
<cross-domain-policy.dtd">
<cross-domain-policy.dtd">
<cross-domain-policy.dtd">
<cross-domain-policy.dtd</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:

```
height:100%;
overflow:hidden;
}
```

b. Change the background-color from white (#FFFFF) 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 directories:

- 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.
- 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 Gallery and Component Categories" on page 218.
  - 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 11 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
- 7. The component displays the required information.

## Create your own Flash report to be displayed in the Xcelsius Reports Viewer (Flash) Component

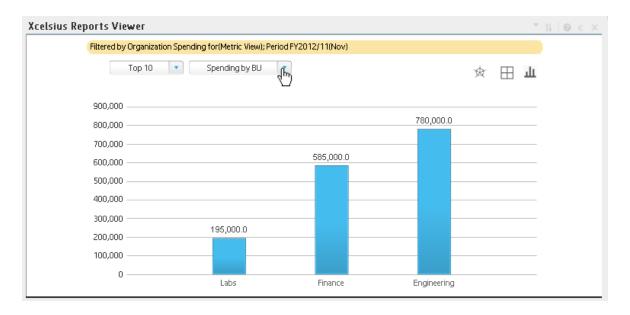
Create your Flash report in Xcelsius and make sure that:

- 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.



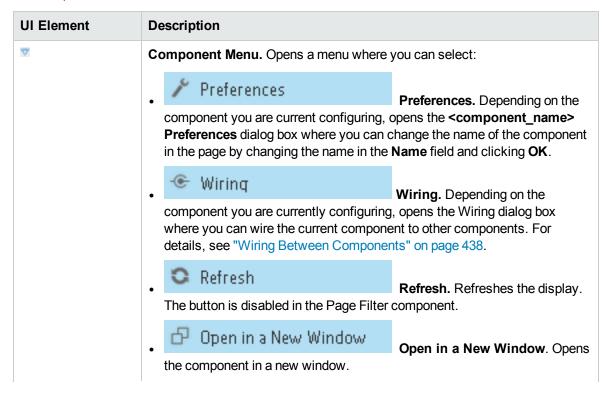
### **Xcelsius Reports Viewer (Flash) Component**

This is an example of the Xcelsius report viewer with a Metric Breakdown report.



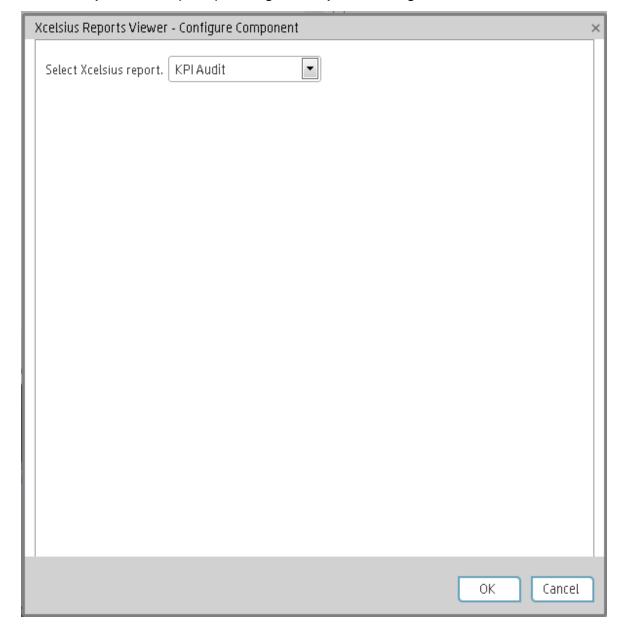
### Component Toolbar

**Note:** The component toolbar description is common to all components. Some of the elements might be disabled in some of the components.



UI Element	Description
AI	<b>Configure Component.</b> Opens the Configure Component dialog box for the relevant component. For details, see the relevant section below.
	Note:
	<ul> <li>The button is disabled in the Breakdown View component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired KPI View, Historical View, or Rolodex components, the Breakdown View component displays the values of the KPI Breakdown for the selected KPI.</li> </ul>
	<ul> <li>The button is disabled in the Forecast component, as the component is filtered by the relevant automatically wired components on the same Dashboard page. When you select an item in one of these wired Historical View, the Forecast component displays the forecast data for the selected KPI.</li> </ul>
	Note: You can also click here in Click Here to configure it in the center of the component
0	Opens the online documentation page relevant to the component you are currently configuring.
*	Collapse component. Collapses the component.
	To expand the collapsed component, click the ≥ button on the collapsed component.
	Drag the Resize handle to enlarge or reduce horizontally the area occupied by the component.
×	Remove Component. Removes the component from the page.

### Xcelsius Reports Viewer (Flash) - Configure Component Dialog Box



UI Element	Description
<report list=""></report>	Select the Xcelsius Report in Flash format you want to display in the Xcelsius Reports Viewer (Flash) component.
	For details, see KPI Audit, Metric Breakdown Report, Project Cost Reduction, and System Health Report and System Health Page in the <i>IT Executive Scorecard Reports Reference Guide</i> .

UI Element	Description
	<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.

# 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.

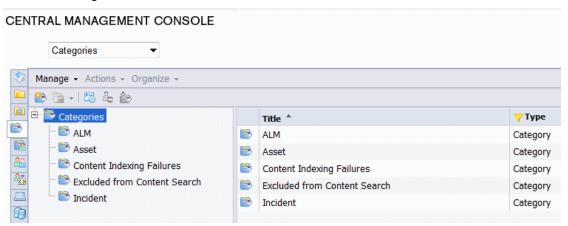
#### To access:

Access the Central Management Console console.

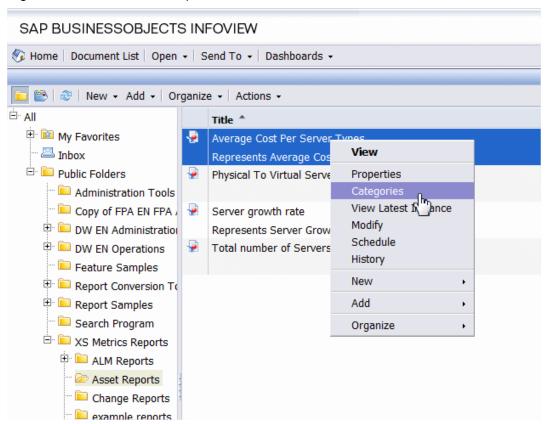


### Create categories

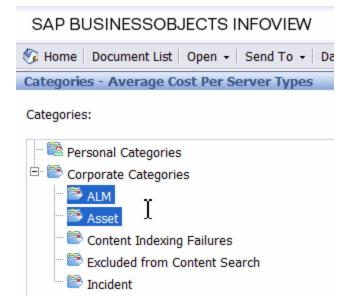
- 1. Access the Central Management Console console.
- 2. Create the categories:



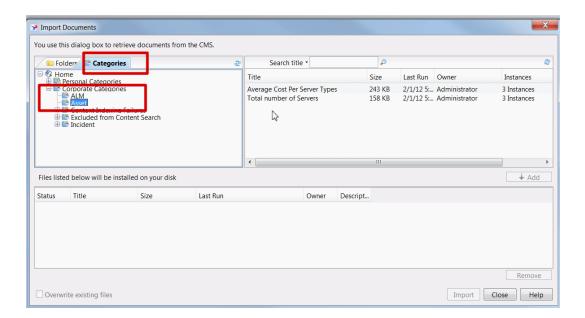
You can now associated metrics (reports) and categories. You can assign more than one category to a report. a. Right-click the relevant Webi report.



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.



# 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.





**Note:** The URL for an external component must begin with one of the following: **https://**, **http://**, or **ftp://**.



Main task: "Dashboard Display" on page 190

This section includes:

•	Create a simple URL component	.430
•	Create a dynamic URL	.431
•	New/Edit Component Dialog Box	432

### 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.

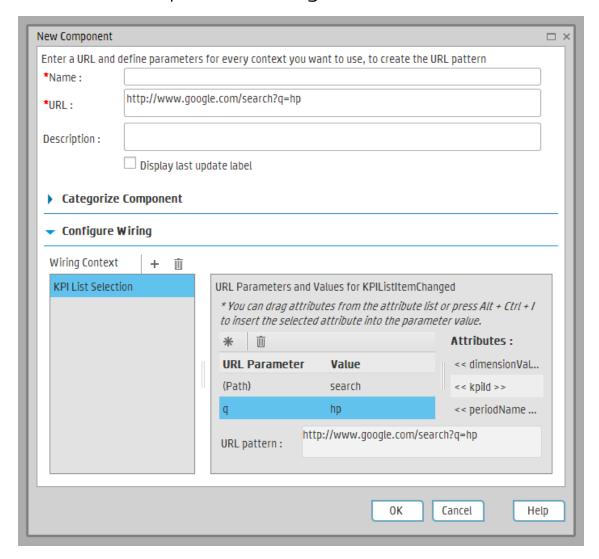
### Create a dynamic URL

- 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



### <Upper Pane>

User interface elements are described below:

UI Element	Description
0	<b>Refresh</b> . If you have edited the static part of the URL, click refresh to update the URL pattern below.

UI Element	Description
Name	Enter the name you want to assign to the component.
URL	Enter the URL of the component.  If you are creating a dynamic URL using parameters, enter the static part of the URL here.
	<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> .
Description	The description of the component.

## **Categorize Component Area**

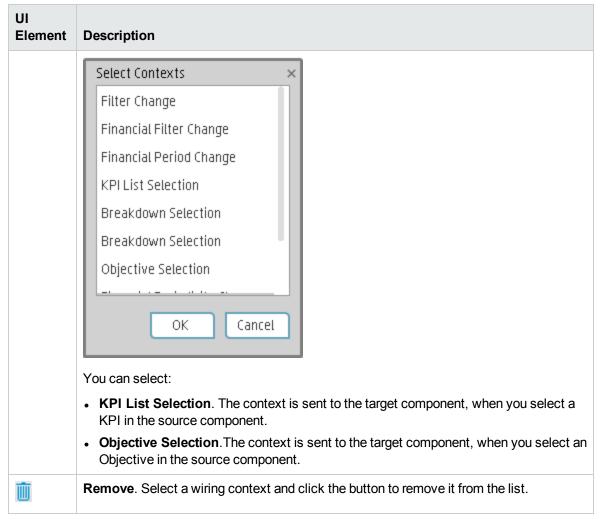
Click on the drop down element to display a list of the existing categories. You can select one or more categories. You can also create new categories. For details, see the Left Pane section of user interface in the "Component Gallery and Component Categories" on page 218.

## **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.
+	Add Context. Click to add a context whose attributes can be used to define the URL pattern.  You must enter a URL in the URL box before you click the Add Context button.  The Select Contexts dialog box enables you to select which context to add.

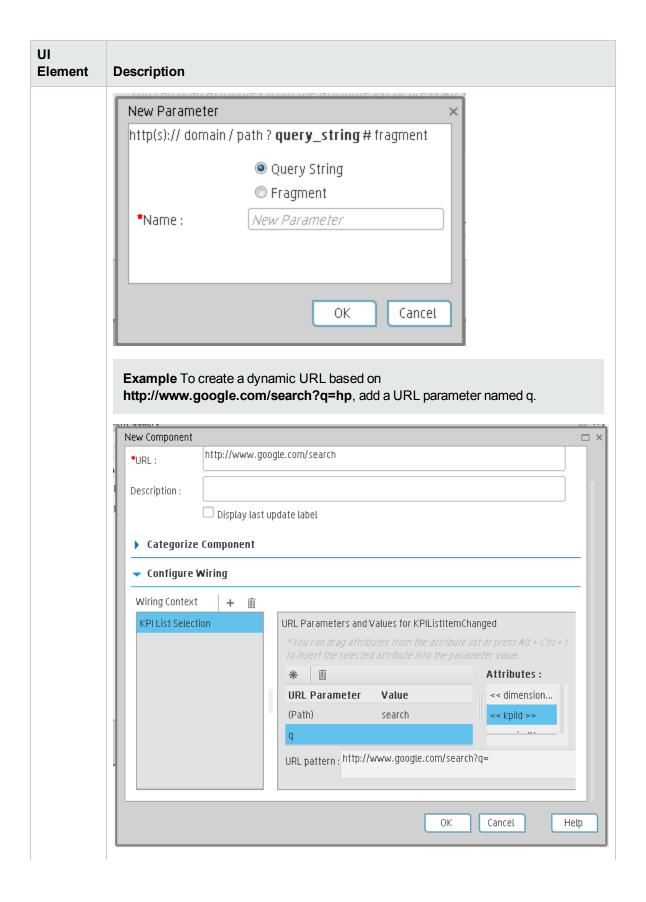


## URL Parameters and Values Area for KPI List Selection or Objective Selection

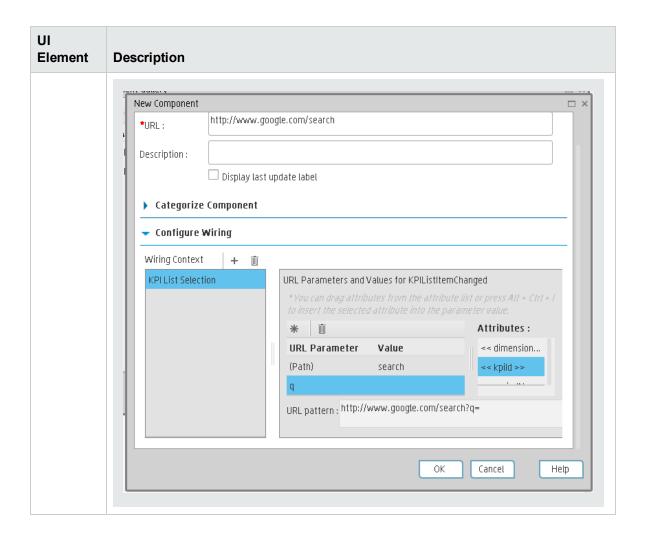
This area enables you to add URL parameters and values to build the URL pattern, using wiring context attributes.

User interface elements are described below:

UI Element	Description
*	<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> :
	Path. The parameter is used in the path part of the URL.
	Query String. The parameter is used in the query string of the URL.
	Fragment. The parameter is used in the rest of the URL.
	Type the parameter name in the <b>Name</b> box in the URL Parameters dialog box that appears.



UI Element	Description
Ū	Remove. Select a URL parameter and click this button to remove it from the list.
URL	Lists the URL parameters you have already configured.
Parameter and Value	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.
	To edit a parameter value, click the value itself and edit its contents.
Attributes	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.
	• If you select KPIChange in the Wiring Context area, the attribute < <kpild>&gt;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.</kpild>
	<ul> <li>If you select ObjectiveChanges in the Wiring Context area, the attributes &lt;<id>&gt; and &lt;<type>&gt; are available to build your URL pattern. The &lt;<id>&gt; parameter represents the ID of the Objective and the &lt;<type>&gt; parameter represents the type of the Objective on which you click in the source component to run the external UR with the ID of the KPI as a parameter.</type></id></type></id></li> </ul>
	To use an attribute as the value of a URL parameter, drag the attribute from this area the Value area of the parameter.
URL Pattern	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.
	<b>Example</b> The result of the creation of a dynamic URL based on http://www.google.com/search?q=.



# 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 430.

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.

Learn More Tasks UI Description



## Wiring

Wiring is between components. It does not depend on the component internal format.

If you drill down (to Breakdowns) in a specific component that is wired to another component on the same page, and you click the triggering component, the component with the Breakdowns is restored to its top level and filtered according to the triggering component.

The wiring between components is set up as follows:

Source Components	Contexts	Target Components
Historical Metric View	Breakdown Selection	Breakdown View
Historical View	Breakdown Selection	Breakdown View
KPI List	KPI List Selection	-
KPI List	Breakdown Selection	Breakdown View
KPI View	KPI View Selection	Historical View
KPI View	Breakdown Selection	Breakdown View
KPI Rolodex	Breakdown Selection	Breakdown View
Scorecard	Objective Selection	KPI View

For details, see "Wiring Between Components" above.



## 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.

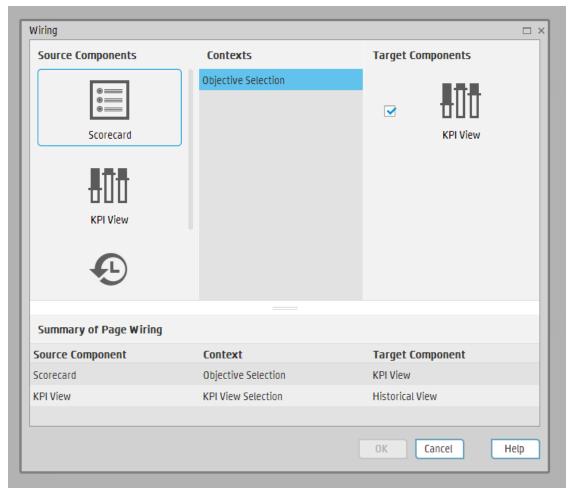
**Example** The selection of one KPI in the KPI View component causes the display of the details of the same KPI in the Historical View component on the same page, if the two components are wired and the KPI View component is the source.

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.

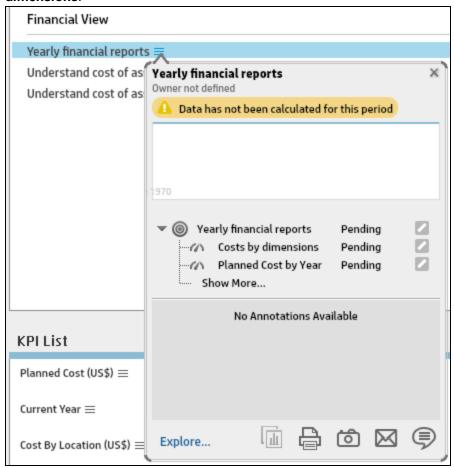
To configure the wiring between components on a page:

- 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.
- 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.
- 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.



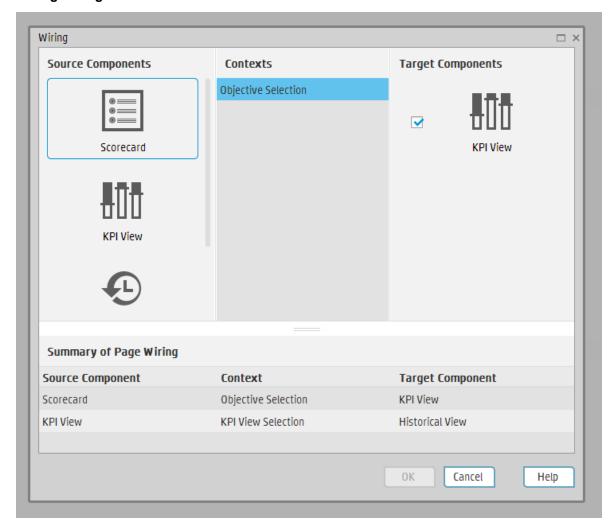
7. In the Scorecard component, click the relevant Objective. The KPI View component that is wired to the Scorecard component immediately refreshes to display the KPI View for the Objective's KPIs, for example: **Costs by dimensions**. In addition, the time period of the KPI View component is reset to 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.

# Ul Description

## **Wiring Dialog Box**



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

UI Element	Description
Source components	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.
Contexts	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.  Select the context you want to send to one or more targets, and then select the target component.

The contexts are:

- KPI View Selection. When the user selects a KPI in the KPI View component, a
  KPI Selection event is published. The Historical View component wired to the
  KPI View component receives that event and its display is updated to show the
  selected KPI history.
- Breakdown Selection. When the user selects a Metric in the Historical Metric View component, a Breakdown Selection event is published. The Breakdown View component wired to the Historical Metric View component receives that event and its display is updated to show the selected Metric Breakdowns. When the user selects a KPI in the Historical View, KPI View, or KPI Rolodex component, a Breakdown Selection event is published. The Breakdown View component wired to the Historical View, KPI View, or KPI Rolodex component receives that event and its display is updated to show the selected KPI Breakdowns.
- Objective Selection. When the user selects an Objective in the Scorecard component, an Objective Selection event is published. The KPI View component that is wired to the Scorecard component receives that event and update its display to show the details of Objective children (Objectives, KPIs, or KPI Breakdowns).
- Filter Change. 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:
  - KPI View
  - KPI List
  - KPI Rolodex
  - · Pie Chart View
  - Historical View
  - · Historical Metric View
  - Dimension Scoring
  - Web Intelligence Report Viewer
  - Xcelsius Reports Viewer

# Target components

This column displays all the page components that have the ability to receive contexts from other components on the page.

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.

Select one or more target components that can receive contexts from the source

component by clicking the check box.



# Summary of page wiring

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.



# Personalize a Dashboard Page

You can personalize a Dashboard page by adding the user's picture to the Dashboard frame.





## 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, .png, .tif, or .bmp
- For best display, the recommended image ratio is 3 x 4.

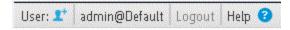
During the image upload, the image is automatically resized to 100 x 100 pixels and the size of the file is reduced.



# Add the user's picture to the Dashboard frame

To add the user's picture to the Dashboard frame.

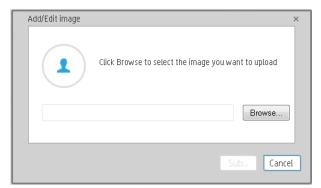
1. Move the cursor above the graphic next to User:



2. Click the Add Image button that is displayed.



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.



# 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 or Web Intelligence Static Report Component Viewer - Configure Component Dialog Box in the *IT Executive Scorecard Business Analyst Guide*.

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

Tasks UI Description



#### This section includes:

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

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

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

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

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



The Web Intelligence report categories are:

- "ALM Defect Reports" below
- "ALM Requirement Reports" on the next page
- "ALM Test Instance Reports" on the next page
- · "Asset Reports" on the next page
- · "Change Reports" on the next page
- "Incident Reports" on page 450
- "Interaction Reports" on page 450
- "Project Reports" on page 450
- "Service Status Reports" on page 450
- "SLA Reports" on page 451
- "Studio Analysis Reports" on page 451
- "Operational Reports" on page 451

### **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 Report
- Average Defect Fix Duration for Urgent Severity by Project in Current Quarter Report
- Average Fix Time per Defect for Top 3 Active Projects Report
- Average Number of Cycles per Active Project Report
- 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 Report
- Number of Defects per Status for Top 3 Active Projects Report
- Number of Detected Defects per Cycle for Top 3 Active Projects Report
- Number of Prolonged Defects for Top 3 Projects Report
- · Number of Reopened Defects by Cycle Report
- Percentage of Non-Reproducible Defects for Top 3 Active Projects in Current Quarter Report
- Percentage of Reopened Defects for Top 3 Active Projects Report
- Total Fix Time per Project for Top 3 Active Projects Report

### **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 Report
- Number of Open Requirements per Type for Top 3 Projects Report
- Number of Requirements per Cycle for Top 3 Projects in Current Quarter Report
- Number of Requirements per Status for Top 3 Projects in Current Quarter Report

### **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 Report
- Average Delay in Test Instance Run for Top 3 Cycles Report
- Number of Cycles by Active Project Report
- Number of Irrelevant Tests by Test Status Report
- Number of Tests by Test Status for Top 3 Active Projects Report
- Number of Tests by Test Status for Top 3 Cycles Report
- Number of Tests by Test Type for Top 3 Active Projects Report
- Number of Tests by Test Type for Top 3 Cycles Report
- Percentage of Test Instances Linked to Defects for Top 3 Active Projects Report
- Percentage of Test Instances Linked to Defects for Top 3 Cycles Report
- Percentage of Tests Linked to Defects for Top 3 Active Projects Report
- Percentage of Tests Linked to Defects for Top 3 Cycles Report

### **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 Report
- Physical to Virtual Server Ratio Report
- Total Number of Servers Report
- · Server Growth Rate Report

#### **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 Report

## **Incident Reports**

The Incident reports are based on the business model taken from the HP Service Manager data source.

## The reports are:

- · No. of Critical Incidents by Customer Report
- Critical Incidents for Top 3 Services Report
- Incident Closure Time for the Top 3 Services Report
- Number of Incidents Caused by Changes vs Total Number of Incidents Report
- · Percentage of Breached Incidents Report
- Percentage of Incidents Attended by Service Report
- Percentage of Service Requests Posted via Web (Self-Help) Report

## **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 Report

Number of Interactions by Category Report

#### **Project Reports**

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

### The reports are:

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

## **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 Report

## **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 Report
- · SLA Not Met by Services Report
- Top 3 Services Suppliers Report

## **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 licon 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 licon 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 464.
- 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 474.

## Dashboard

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.

**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.

#### To access:

Click the relevant tabs in the Dashboard





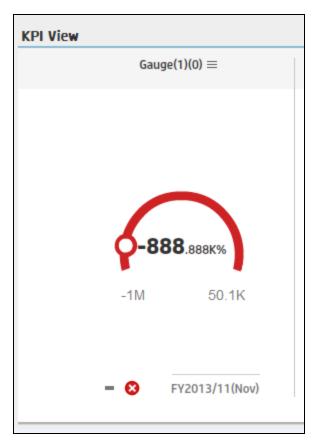
### Out-of-the-box pages

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 13.

#### **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:





## This section includes:

•	View the relevant objectives in your pages	.455
•	Analyze your objectives using the components on your pages	. 455
•	Drill down to your subordinate's Scorecards	456
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• Drill down to more details about the Objectives, KPIs, or KPI Breakdowns in the EXPLORER to	ab458
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Analyze the raw data for a KPI or Metrics	
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# 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:

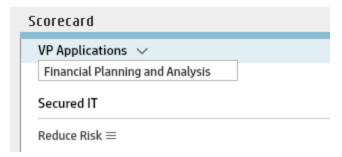
- KPI List component. For details, see "The KPI List Component" on page 309.
- Historical Metric View component. For details, see "The Historical View Component" on page 298.
- Historical View component. For details, see "The Historical View Component" on page 298.
- KPI Rolodex component. For details, see "KPI Rolodex Component" on page 317.
- KPI View component. For details, see "The KPI View Component" on page 327.
- Pie Chart View component. For details, see "The Pie Chart Component" on page 355.
- Scorecard component. For details, see "The Scorecard Component" on page 366.

- Web Intelligence Reports Viewer component. For details, see "The Web Intelligence Report Viewer Component" on page 397.
- Web Intelligence Static Report Viewer component. For details, see "The Web Intelligence Static Report Viewer Component" on page 402.
- Web Intelligence Dynamic Report Viewer component. For details, see "The Web Intelligence Report Viewer Component" on page 397
- Xcelsius Report component. For details, see "The SWF Report Viewer Component" on page 385.

## 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.

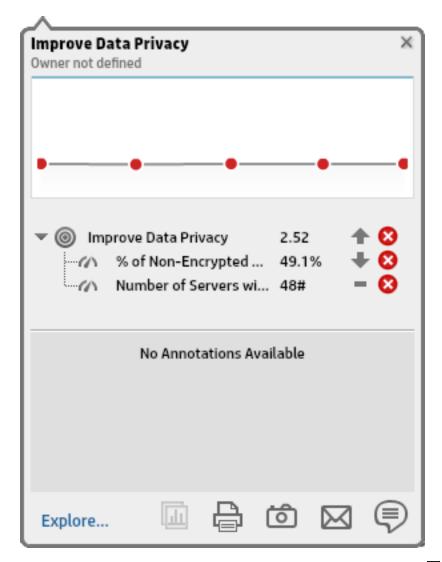
To return to the parent Scorecard, click the X to close the subordinate Scorecard display. Note that you can only access one level down (meaning that if the subordinate Scorecard has subordinates, to access their information, you must create a Scorecard component for the first level of subordinate Scorecard).

For details, see "The Scorecard Component" on page 366.

# Display more information about a specific Objective or KPI

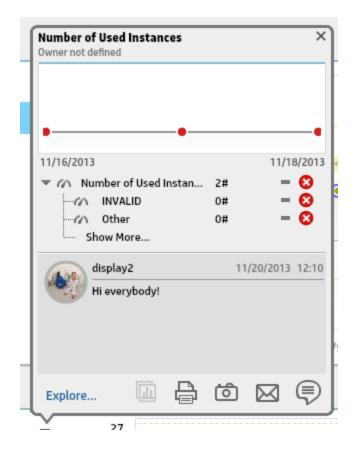
From a Scorecard component, move the cursor above the licon at the end of the Objective's name to view over time information about the Objective, details about the Objective's KPIs and the annotations added to the Scorecard by users.

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 464.



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 464.



# 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 438

# 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 474.

# 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 474.

# 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 "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.

The Objectives include groups of KPIs of different types that can represent different aspects of the goal. For details, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" on page 51.

**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 166.

# 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.

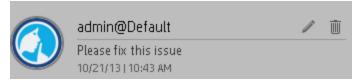
For additional details, see "Explorer" on page 474.

# 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 474.

## 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.

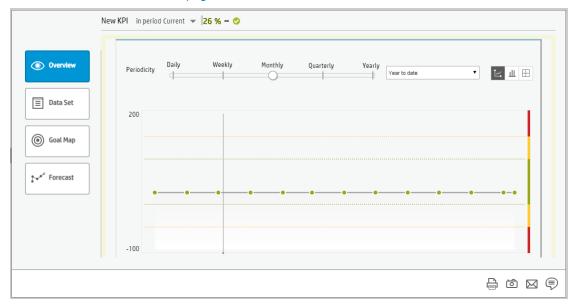
For additional details, see "Explorer" on page 474

# 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.

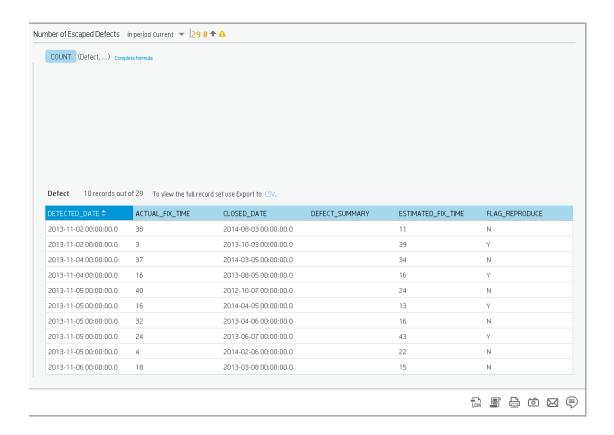
The Overview area in Explorer displays information about the selected Scorecard, Objective, Perspective, KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI, over time information beginning from the current period. You can also display past information by selecting a past period of time. The area displays different information depending on the type of item you selected.

For details, see "Overview" on page 482.



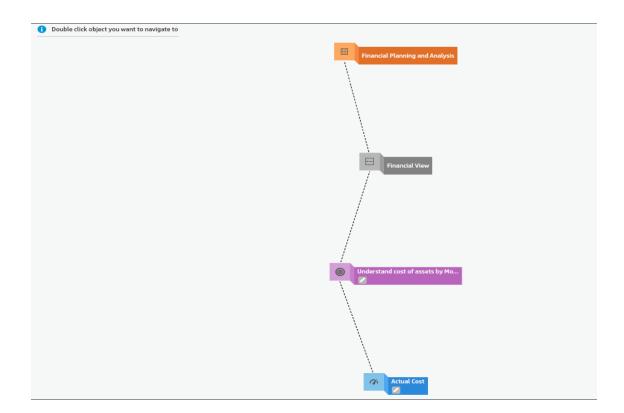
# Analyze the raw data for a KPI or Metrics

- 1. In Explorer, click the relevant KPI or Metric in the Active KPIs tree.
- 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 501.



# 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 517.



# 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 connear 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 hear a KPI or Metric in a Dashboard component to display the KPI First Level Navigation (FLN) area.

Move the cursor above the or rear an Objective in a Scorecard component to display the Objective First Level Navigation (FLN) area.

Tasks UI Description



This section includes the following tasks:

# Display more information about a specific Objective

From a Scorecard component in a page, move the cursor above the  $\equiv$  or  $\stackrel{*=}{=}$  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 "First Level Navigation (FLN) for an Objective, a KPI, or a Metric" above.

# Display more information about a specific KPI or Metric

From any other out-of-the-box component, move the cursor above the  $\equiv$  or  $\stackrel{*=}{=}$  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  $\equiv$  or  $\stackrel{*}{\equiv}$  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) for an Objective, a KPI, or a Metric" on the previous page.

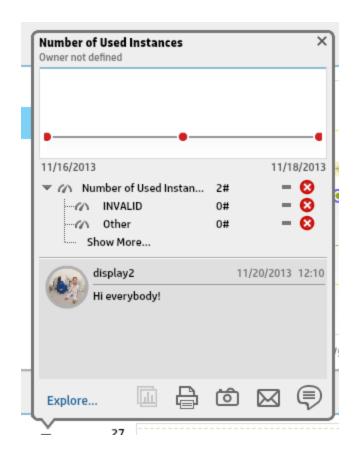
Use Case - Add an Annotation, Send Email, Save as PDF, and Print

For details, see Use Case - Add an Annotation, Send Email, Save as PDF, and Print in the *Getting Started with IT Executive Scorecard*.

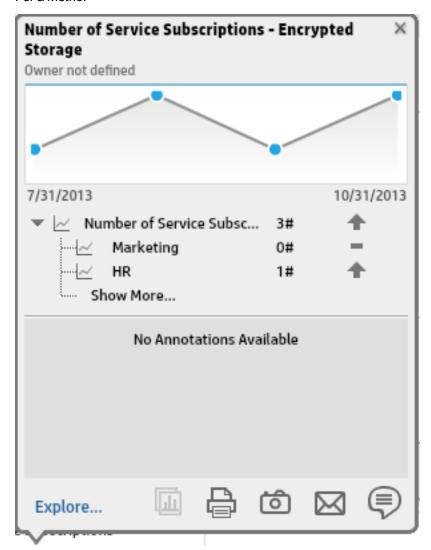


First Level Navigation (FLN) area

For a KPI



### For a Metric:

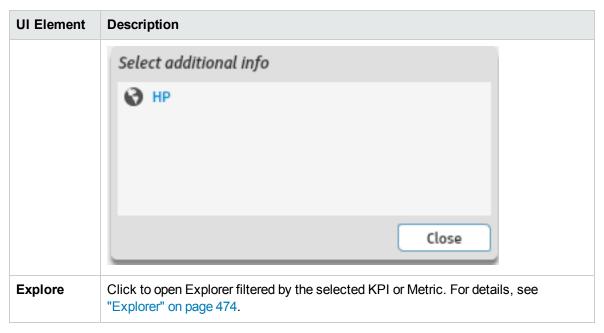


User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets):

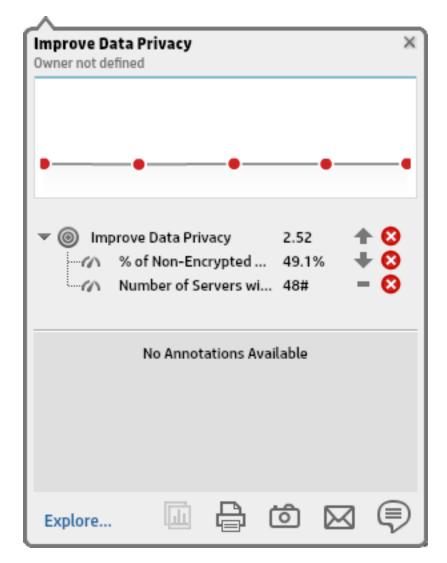
UI Element	Description
Name>	The name of the KPI or Metric.
<over time="" value=""></over>	The graph displays the over time value of the KPI or Metric for 5 periods in the past from the period configured in the Display Period for the KPI or Metric.
	<b>Example</b> If the KPI or Metric Display Period 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.
	To add an annotation to the chart, you can click to open an annotation box.

## UI Element Description <KPI, KPI This section displays: Breakdown, • The name of the KPI or Metric, its value, trend, and status (for a KPI). Metric, or • If the KPI has more than 3 KPI Breakdowns, only the 2 Breakdowns with the Metric lowest score are displayed in the FLN area with their name, value, trend, and Breakdown> status. 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. • If the KPI or Metric has more than 3 KPI or Metric Breakdowns, a **Show more** 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. 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 **No data** 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. 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. Annotations 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 **Show more** 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. **Add annotation**. Opens a box where you can add your annotation: George, Please explain these results. Thanks. Add Discard Explore... Enter the text of the annotation and click **Add** to add the annotation to the list or **Discard** to discard the annotation. **Send mail.** Opens an Outlook email that includes: $\mathbb{M}$ The owner (if it was defined in the Studio) of the selected KPI or Metric, or KPI or Metric Breakdown listed in the **To** box, • The name of the selected KPI or Metric, or KPI or Metric Breakdown in the Subject box.

#### **UI Element** Description • The text of the just written annotation in the body of the email if an annotation was entered. A link to the KPI or Metric, or KPI or Metric Breakdown entity from the component FLNs (not from the Scorecard component) is added at the end of the email. In the email, click the link to open Explorer in the context of the entity with the selected period. \_ D X 32 | 🔛 ۵ (?) Message Insert Options Format Text Review Developer Diagnostics · A A Attach File 1 Attach Item ▼ Names Paste Tags Zoom - E = = >¶ ¶4 A Signature \* Clipboard 👨 Include Zoom To... - 1 Cc... Send Bcc... Subject: % of Met SLAs <u>.</u> John, Please send an explanation as soon as possible. Link to the "% of Met SLAs": https://raid.um01472.him.il /fndwar/loadedApplication.jsp? forceRedirect=true&type=kpi\_type&entityId=3464&startDate=1385848800000&timeRange: Note: The link does not request a user/password combination when it is activated during the same session. Save snapshot. Opens your list of directories, where you can select the location of O the PDF you are creating. **Print.** Opens a dialog box where you can select and configure the printer, and send the FLN area contents to print. Additional info. Opens a pop up that lists all the additional info configured for the 址 KPI or Metric: reports, Dashboard pages, or external URLs. The button is enabled only when the KPI or Metric has additional information.



Objective First Level Navigation (FLN) area



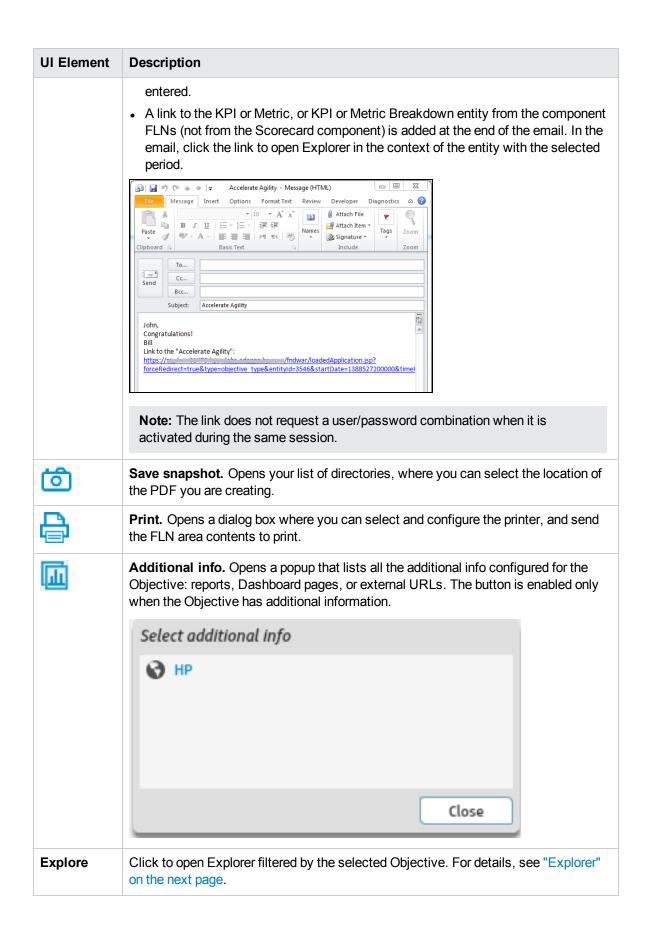
User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets):

UI Element	Description	
Name>	The name of the Objective.	
<over time="" value=""></over>	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.	
	<b>Example</b> If the Objective period is 1 month, the graph displays the value of the Objective over the past 5 months.	
	To add an annotation to the chart, you can click to open an annotation box.	
<objective></objective>	This section displays:	

## **UI Element** Description • The name of the Objective, its value, trend, and status. • 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. If the Objective has more than 3 KPIs, a Show more 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. Note: • 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 **Objective has been calculated** with partial data and clicking the Objective in the Objective FLN area displays the EXPLORER tab with the same message. When an Objective does not display data because none of its KPIs has data, the Objective FLN area is available. • 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. Annotations 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 **Show more** link. Click the link to open Explorer filtered for the selected Objective, where you can see all the annotations of the selected Objective. $\equiv$ **Add annotation**. Opens a box where you can add your annotation: George, Please explain these results. Thanks. Add Discard Explore... Enter the text of the annotation and click **Add** to add the annotation to the list or **Discard** to discard the annotation. × **Send mail.** Opens an Outlook email that includes: • The owner (if it was defined in the Studio) of the selected Objective listed in the To

The name of the selected Objective in the **Subject** box.

• The text of the just written annotation in the body of the email if an annotation was



## **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 or The Historical Metric View Component in the IT Executive Scorecard Business Analyst Guide.

Learn More Tasks UI Description



- 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.



This section includes the following tasks:

<ul> <li>Access Explorer to display detailed information about a selected KPI, Met</li> </ul>	tric, or Objective475
Use Case - Drill down in Explorer to View More Information	475
Overview	482
Data Set	501
Goal Map	517
Forecast	525
Annotations	537

# 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 page 482

"Data Set" on page 501

"Goal Map" on page 517

## Use Case - Drill down in Explorer to View More Information

In this section you will learn how to drill down into Explorer to view more information related to the Scorecard, Perspective, Objective, KPI, Metric, KPI Breakdown, or Metric Breakdown you selected in Dashboard.

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.

<sup>&</sup>quot; Forecast" on page 525

<sup>&</sup>quot;Annotations" on page 537

To access Explorer, do one of the following:

1. Click the Explorer tab. For details, see Explorer in the *IT Executive Scorecard Business Analyst Guide*.

#### 2. In the **Overview** tab:

Depending on the selected item, the tab displays:

- For a **Scorecard** or a **Perspective**, the name and description of the item as defined in the Studio, and if they exist, the Cascading Scorecards or the Scorecard.
- For an **Objective**, **KPI**, **Metric**, or **Unassigned KPI**, the selected item over time information, in graph, table, or bar format, spanning a time period up to the current time period for the selected Objective, KPI, or Unassigned KPI, as defined in the item configuration or for the period you selected in the Overview tab. In addition, the tab displays the configuration and calculation details as defined in the Studio.

You can move the cursor above the graph to display a line that shows the exact date and value of a specific point.

For a KPI Breakdown or a Metric Breakdown, a pie chart is displayed as well as 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.

The pie includes up to 10 slices.

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 Breakdown, the value of the dimension. The tooltip of the 10th slice shows the list of all the other values.

For more details, see Overview in the IT Executive Scorecard Business Analyst Guide.

#### 3. In the Data Set tab:

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.

• View the numeric result of each aggregation function. You can view the numeric result of each aggregation function used in the formula of a selected KPI or Metric:

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.

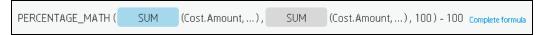


Move the cursor above that area to display the value of that function.



• View the table of raw data used for each aggregation function. You can view the table of raw data used for each aggregation function used in the formula of a selected KPI or Metric:

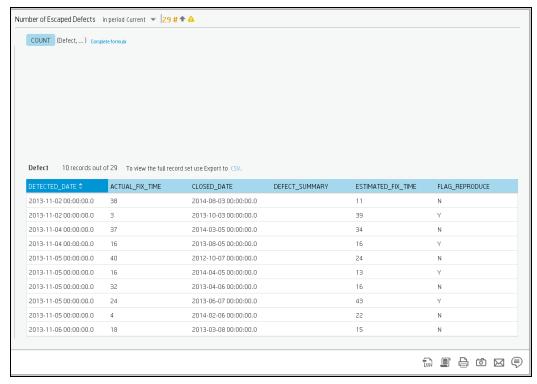
 The formula used to calculate the KPI or Metric is displayed at the top of the page. The activated aggregation function has a blue background.



 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.



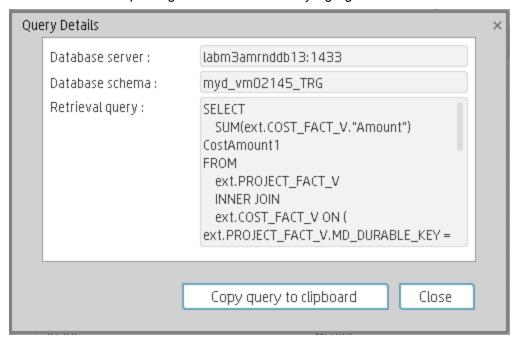
- You can sort the columns and sort the table to view additional information from the database.
- Export all the data included in the Target database that is used to calculate the

**function.** 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. 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 SQL query that is used by the formula. To view the SQL phrase that is executed

in the database and the relevant database connection details (DB server and DB schema): 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.

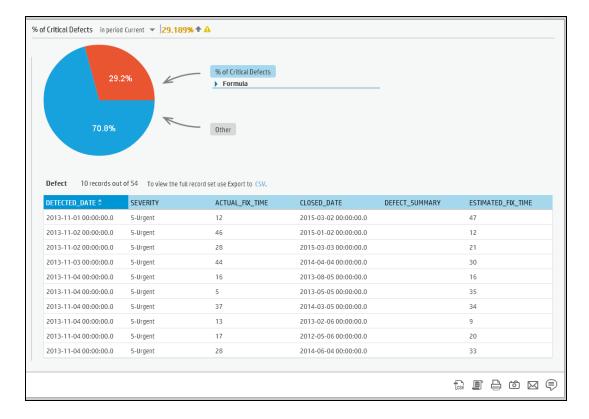
Click the relevant aggregation function and then click
 A dialog box opens and displays the name of the machine on which the database is installed followed by the port used, the name of the Target schema, and the SQL query that is run to perform the calculation corresponding to the function currently highlighted in the formula.



• View a detailed description of the percentage formula. To view a detailed description of the percentage formula:

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.



#### · You can also:

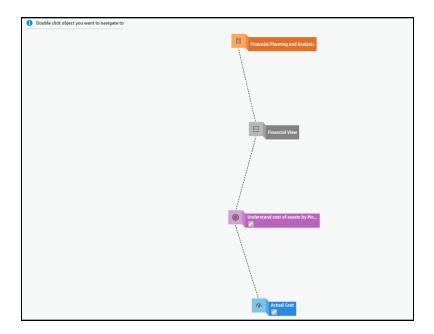
- Send the contents of the Data Set page by Email.
- Export the contents of the Data Set page to a PDF file
- Print the contents of the Data Set page

For more details, see Data Set in the IT Executive Scorecard Business Analyst Guide.

#### 4. In the Goal Map tab:

The Goal Map provides a tree of nodes that represents the impact of the selected KPI, or KPI Breakdown on the relevant Objectives, Perspectives, and Scorecards for the current period of the selected KPI, or KPI Breakdown. In addition, the display of the Goal Map depends on the user permission.

• 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, and click the **Goal Map** tab.



#### You can also:

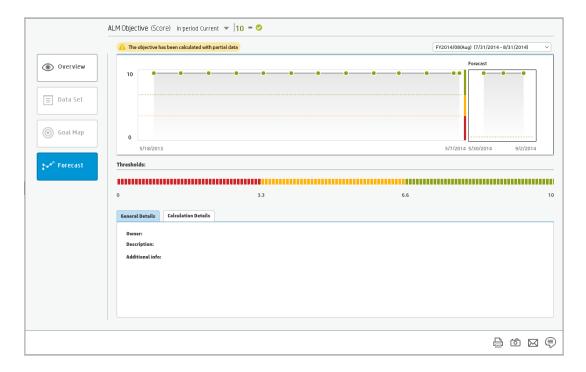
- Send the contents of the Goal Map page by Email.
- Export the contents of the Goal Map page to a PDF file
- Print the contents of the Goal Map page

For more details, see Goal Map in the IT Executive Scorecard Business Analyst Guide.

#### 5. In the **Prediction** tab:

Executive Scorecard provides information regarding the status and values of Objectives, KPIs, or Metrics on the past and current periods in the Dashboard and Explorer tabs. The Forecast tab in Explorer provides a glimpse into the future by forecasting the entity future behavior, based on historical data, so you will be able more easily understand the underlying trend and to do all you can now to improve or maintain the desired behavior.

• Double-click an Objective, KPI, or Metric in the Active tree and click **Prediction**. The tab displays the same information as the Overview tab with the addition of the prediction window to the right of the graph.



- You can also:
  - Send the contents of the Prediction page by Email.
  - Export the contents of the Prediction page to a PDF file
  - Print the contents of the Prediction page

For more details, see Forecast in the IT Executive Scorecard Business Analyst Guide.

**Movie:** To display the relevant movie, open the XS application, click **Help** in the top right corner of the application main page and select the **Movies** option. Select the relevant movie. For details, see Access Movies in the *Getting Started with IT Executive Scorecard*.



**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 501

"Goal Map" on page 517

" Forecast" on page 525

"Annotations" on page 537

## 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.

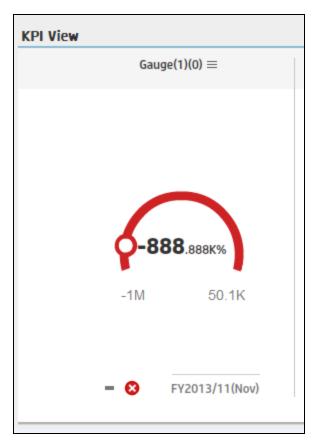


- When you double-click a point in the Historical View or Historical Metric View component, or  $\equiv$  or in any component, the Explorer tab displays only the details for the selected item for which you have the correct permissions. Click the X to the right of the search box to display all the nodes 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:





This section includes:

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 Level 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 Access Movies in the Getting Started with IT Executive Scorecard.

## 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**



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 Access Movies in the Getting Started with IT Executive Scorecard.

## Print the contents of the Overview area

- 1. In the EXPLORER tab, click the relevant item in the Active KPIs tree and click **Overview**.
- To print contents of the Overview area, click the Print 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 Access Movies in the *Getting Started with IT Executive Scorecard*.

### Add an Annotation

- 1. In the EXPLORER tab, click the relevant item in the Active KPIs tree and click **Overview**.
- To add an annotation, click the **Show annotations** icon. The Annotation area opens. For details, see "Annotations" on page 537.

**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 in the *Getting Started with IT Executive Scorecard*.

## Change the KPI or Metric Periodicity, On-Demand

- In the EXPLORER tab, click the relevant KPI or Metric in the Active KPIs tree and click Overview.
- 2. Use the Periodicity slider to locally change the periodicity of the KPI or Metric. The KPI or Metric are immediately recalculated and their values displays in the Overview tab. The KPI or Metric periodicity is not modified in the other tabs of EXPLORER, the STUDIO, or the Dashboard. The selected periodicity is persistent in **Explorer > Overview**.

This feature is also available for KPI Breakdowns and Metric Breakdowns.



#### **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.

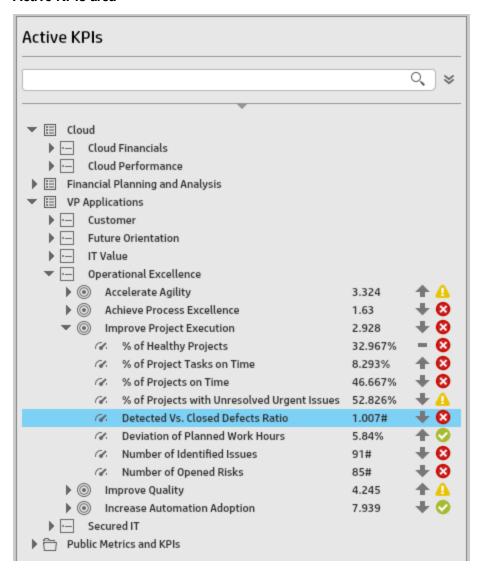
The Overview area includes the following areas:

"Active KPIs area" on the next page

"Overview area" on page 488

"Toolbar" on page 499

#### **Active KPIs area**



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

UI Element	Description
Q <search></search>	Enter the relevant string to display, in the tree, the nodes whose name includes the string.
	In addition, the child nodes of the filtered nodes are also listed even when the child node names do not include the string.
	If the display is filtered (in case you accessed the Explorer from one of the components in the Dashboard), the <search> box displays information about the filter. For example:</search>

## UI Element Description Active KPIs × Actual Cost Actual Cost Pending **Advanced Search.** Opens additional fields to help you refine the component's filter: ℽ • Status: Select one of the All, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs area. When you select **No Data**, the search returns only the elements with no data. • Type: Select: • All. To display all the elements in the tree with the selected status. KPI. To display only the KPIs with the selected status. Metric. To display a list of all the Metrics (the Status is changed to All). If you had selected a value in Status, and then you select Metric, then the Status field displays AII, and becomes inaccessible. Objective. To display only the Objectives with the selected status, and their KPIs. Active Depending on how you accessed the Explorer tab, the pane lists all the Scorecards, **KPIs** Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, and Unassigned KPIs, active in the HP IT Executive Scorecard or a subset of these items. 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. **Note:** 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 **Refresh** button to display the Scorecard. 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. 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: The name of the item. The value of the item.

UI Element	Description	
	• The trend icon indicates the trend of the value calculated over the current period.	
	The status of the item, during the current period. It can be:	
	• oindicates that the status is Good.	
	indicates that the status is Warning.	
	indicates that the status is Critical.	
	<ul> <li>indicates that the status is <b>Pending</b> and that the calculations have not yet been performed or completed.</li> </ul>	

### Overview area

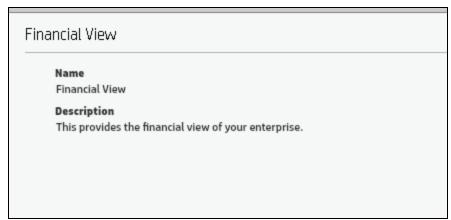
- <Graph or table area>
  - For a Scorecard:

Fi	Financial Planning and Analysis	
	Name Financial Planning and Analysis	
	<b>Description</b> Financial Planning and Analysis	
	Cascading Scorecards: New Scorecard	

UI Element	Description
<name></name>	The name of the Scorecard you selected in the Active KPIs pane.
Name	The name of the Scorecard you selected in the Active KPIs pane.
Description	The description of the Scorecard as it appears in the Scorecard Configuration Details pane.
Cascading Scorecards	The list of Cascading Scorecards assigned to the Scorecard.
	Note: This field appears only for Scorecards and when the Scorecard

UI Element	Description	
	has been assigned Cascading Scorecards.	

#### • For a Perspective:

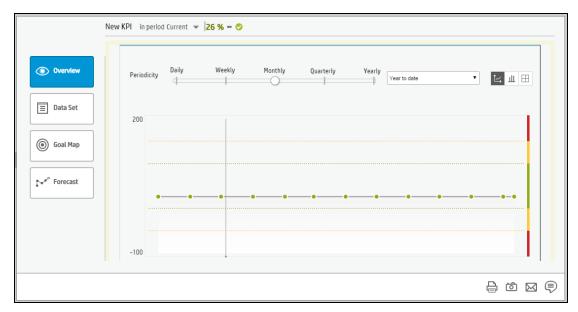


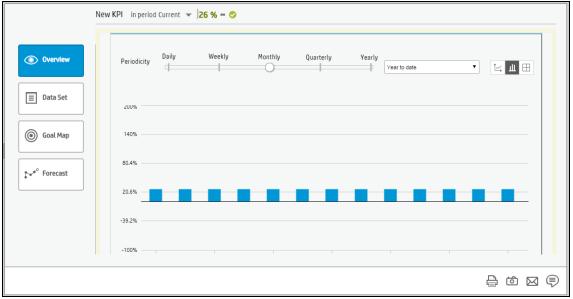
UI Element	Description
<name></name>	The name of the Perspective you selected in the Active KPIs pane.
Name	The name of the Perspective you selected in the Active KPIs pane.
Description	The description of the Perspective as it appears in the Perspective Configuration Details pane.

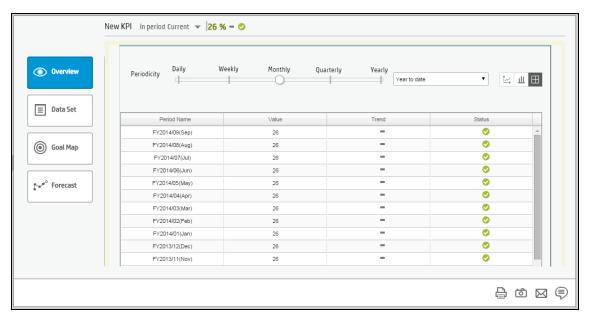
### • For an Objective, KPI, Metric, or Unassigned KPI:

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.

For KPIs or Metrics, you can also use the Periodicity slider to change, on-demand, the periodicity displayed in the tab.

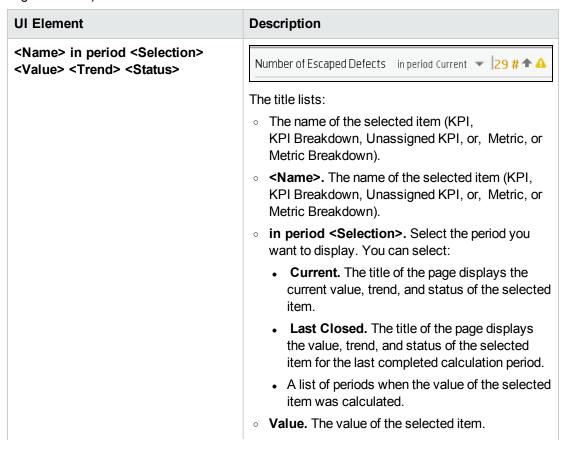




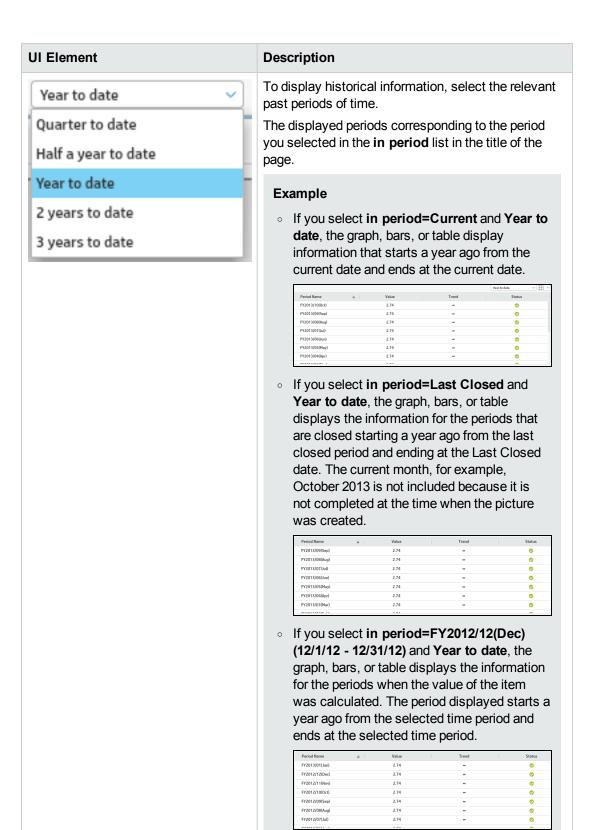


The area displays the selected item over time information spanning a time period up to the current time period for the selected Metric or for the period you selected in the Overview tab.

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



UI Element	Description
	<ul> <li>Trend. 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> </ul>
	<ul> <li>Status. The status of the KPI, KPI Breakdown (Metrics, and Metric Breakdowns do not have a status), during the current period. It can be:</li> </ul>
	• oindicates that the status is Good.
	A indicates that the status is Warning.
	indicates that the status is Critical.
	<ul> <li>indicates that the status is Pending or No data, meaning that the calculation of the status was not yet completed or the status was not calculated or that there was en error in the calculation.</li> </ul>
Periodicity	<b>Note:</b> The slider is displayed only for KPIs, Metrics, KPI Breakdowns, and Metric Breakdowns.
	Periodicity Daily Weekly Monthly Quarterly Yearly
	By default, the periodicity slider indicates the periodicity selected during the configuration of the KPI or Metric.
	Slide the cursor to the left or right, to locally change the periodicity of the KPI, Metric, KPI Breakdown, or Metric Breakdown. The recalculation is performed immediately and the values displayed in the graph, line, or bars in the Overview tab only.
	The periodicity in the configuration of the KPI or Metric in the STUDIO, in the other tabs of EXPLORER, or in the Dashboard, is not modified when you use the Periodicity slider.
	The selected periodicity is persistent in <b>Explorer</b> > <b>Overview</b> .



UI Element	Description
	Select one of the following chart types:
	to display the information in line chart format.
	to display the information in bar chart format.
	to display the information in table format.
<bar format=""></bar>	<ul> <li><x-axis>. The X-axis displays the time frame you selected, split into equal segments corresponding to the configured period of the item.</x-axis></li> </ul>
	<ul> <li><y-axis>. The Y-axis displays the values of the selected item in the relevant unit.</y-axis></li> </ul>
	<tooltip>. Displays the value of the item for the relevant time frame.</tooltip>
<line chart="" format=""></line>	Indicates a regular "point" corresponding to a division of the time period.  You can move the cursor above the graph to display a line that shows the exact date of a specific point.  Indicates a regular "point" corresponding to a division of the display a line that shows the exact date of a specific point.  Indicates a regular "point" corresponding to a division of the display to a division above the graph to display a line that shows the exact date of a specific point.  Indicates a regular "point" corresponding to a division of the display to a specific point.  Indicates a regular "point" corresponding to a division of the display to a specific point.  Indicates a regular "point" corresponding to a division of the display to a specific point.  Indicates a regular "point" corresponding to a division of the specific point.

UI Element	Description
	example: division by zero), an arithmetic error due to missing data, or other reasons.
	<ul> <li><threshold>. The chart automatically displays the thresholds if you have selected an Objective or KPI.</threshold></li> </ul>
	<ul> <li><x-axis>. The X-axis displays the time frame of the selected item, split into equal segments.</x-axis></li> </ul>
	<y-axis>. The Y-axis displays the values of the selected item in the relevant unit.</y-axis>
<table format=""></table>	<ul> <li>Period Name. The list of relevant periods. For details see the explanation for Year to date and other historical periods higher in the table.</li> </ul>
	<ul> <li>Value. The value of the selected item for that period.</li> </ul>
	<ul> <li>Trend. The trend icon indicates the trend of the value calculated over the period configured for the item.</li> </ul>
	Status. The status of the item during the period. It can be:
	• oindicates that the status is Good.
	A indicates that the status is Warning.
	indicates that the status is Critical.
General Details tab	Owner. The owner of the item (Objective, KPI, KPI Breakdown, Metric, Metric Breakdowns or Unassigned KPI) selected in the Active KPIs pane.
	<b>Description.</b> The description of the item selected in the Active KPIs pane.
	<b>Business Motivation.</b> The business motivation of the KPI or KPI Breakdown selected in the Active KPIs pane.
Calculation Details tab	The tab displays the configuration of the Objective, KPI, or Metric as it appears in the Studio.

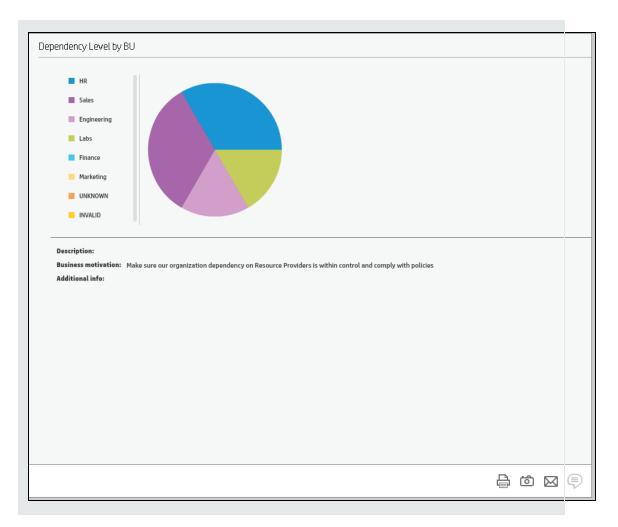
## **UI Element** Description General Details | Calculation Details | Forecast Details Calculation period: Monthly Business Context: ALM\_DefectDemo RATIO\_MATH(COUNT(Defect, Defect.ClosedDate IN\_PERIOD),COUNT(Defect, Defect.DetectedDate IN\_PERIOD)) Unit. The unit of the Metric, KPI, or KPI Breakdown or Metric Breakdown. **Calculation Period.** The period of the Objective, Metric, KPI, or KPI Breakdown. Business Context. The context assigned to the Metric, KPI, or KPI Breakdown or Metric Breakdown. KPI/Metric Formula. The formula used to calculate the KPI/Metric value. **Filter.** The filter assigned to the KPI/Metric. **Comments.** The comments added to the KPI/Metric definition. Calculated By. The type of rule used to calculate the Objective's score according to the score of its children. It can be: 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 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 (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

UI Element	Description
	weighted average.
Additional Info	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.
	When an Objective, KPI, Metric, KPI Breakdown, or Metric Breakdown has been assigned a Dashboard page in Additional Info, and if you change the name of the page in the Dashboard, the change is not reflected in Explorer. Explorer is updated only after the cache is refreshed for example by editing in the Studio or by performing a calculation.
	Note for the System Administrator: 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 parameter bo.in.use is configured as true in the SETTINGS_MANAGEMENT table in the Management database.

#### • 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></name>	<ul> <li><name>. The name of the selected item (KPI, KPI Breakdown, Unassigned KPI, or, Metric, or Metric Breakdown).</name></li> </ul>
<legend></legend>	The legend displays the representative color and the value of the KPI Breakdown or Metric dimension.
<pie></pie>	The pie includes up to 10 slices.  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.
Description	The description of the KPI Breakdown or Metric Breakdowns selected in the

UI Element	Description
	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.
	When an Objective, KPI, Metric, KPI Breakdown, or Metric Breakdown has been assigned a Dashboard page in Additional Info, and if you change the name of the page in the Dashboard, the change is not reflected in Explorer. Explorer is updated only after the cache is refreshed for example by editing in the Studio or by performing a calculation.

## Toolbar

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

UI Element	Description
$\bowtie$	<b>Send mail.</b> Opens an Outlook email, with the name of the selected entity in the <b>Subject</b> box.
<b>©</b>	<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.
	<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.
	The printout includes:
	The contents of the area that was selected while you clicked the button.
	The Annotations Area.
	<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 "Annotations" on page 538.
	Click the button again to close the Annotation area.
	Note: The Show/Hide Annotations icon with a little + sign in the bottom toolbar indicates that a new annotation was added to the selected item during the past week.  The number of days during which the annotations are considered to be new is a

UI Element	Description
	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.

## 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.



This section includes:

## Access Explorer to display detailed information about a selected KPI or Objective

To view more detailed information for a selected KPI or Objective:

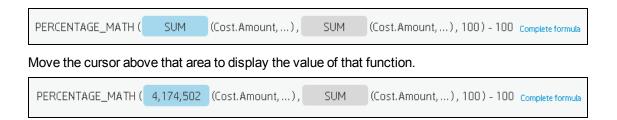
- Move the cursor over the relevant item in the KPI or Scorecard component in the Dashboard page. In the tooltip that opens, click Explore... The EXPLORER tab opens for the selected item.
   Or click the Explorer tab to display the Active KPIs tree, and by clicking the relevant KPI, KPI Breakdown, Metric, Metric Breakdown, or Unassigned KPI in the tree, display detailed information about the selected item in the EXPLORER tab.
- 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.



## 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.

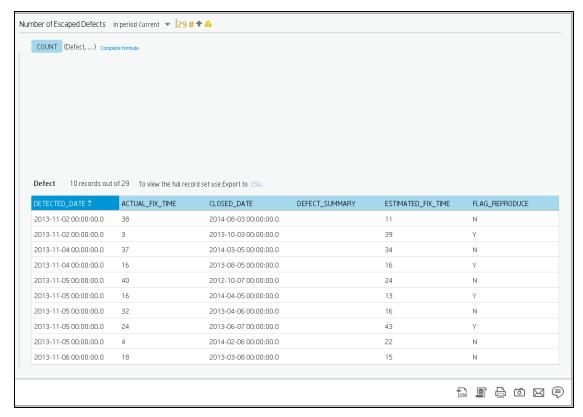
The formula used to calculate the KPI or Metric is displayed at the top of the page. The activated aggregation function has a blue background.



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.



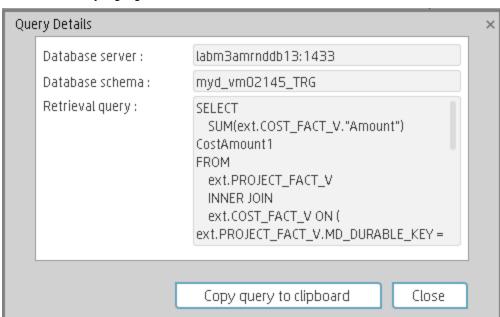
You can sort the columns and sort the table to view additional information from the database.

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):

- 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.
- 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:

- 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.



3. Click Cor 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:

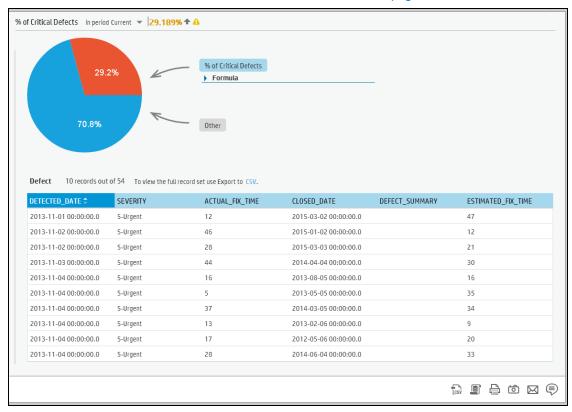
 Move the cursor over the relevant item in the KPI, Metric, or Scorecard component in the Dashboard page. In the tooltip that opens, click **Explore...**. The EXPLORER tab opens for the selected item.

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 509.



## 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" 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 in the *Getting Started with IT Executive Scorecard*.

## 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 Access Movies in the *Getting Started with IT Executive Scorecard*.

## 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 Access Movies in the *Getting Started with IT Executive Scorecard*.



#### **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:

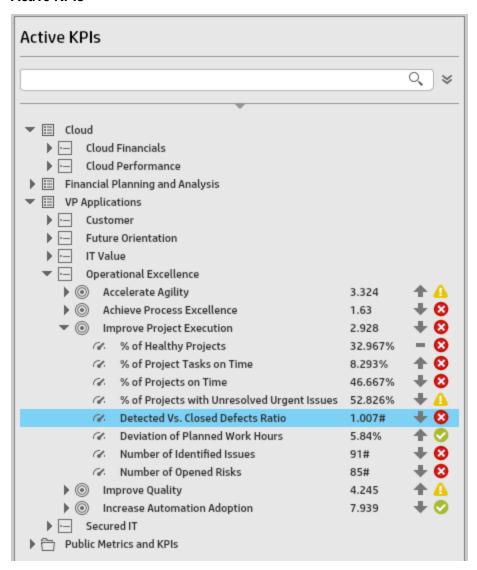
"Active KPIs" on the next page

"Data Set" on page 509

"Toolbar" on page 514

"Additional Buttons in Toolbar" on page 515

#### **Active KPIs**

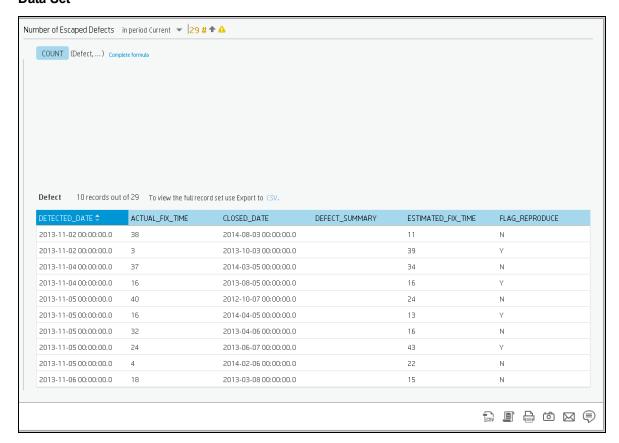


UI Element	Description
◯ <search></search>	Enter the relevant string to display, in the tree, the nodes whose name includes the string.
	In addition, the child nodes of the filtered nodes are also listed even when the child node names do not include the string.
	If the display is filtered (in case you accessed the Explorer from one of the components in the Dashboard), the <search> box displays information about the filter. For example:</search>

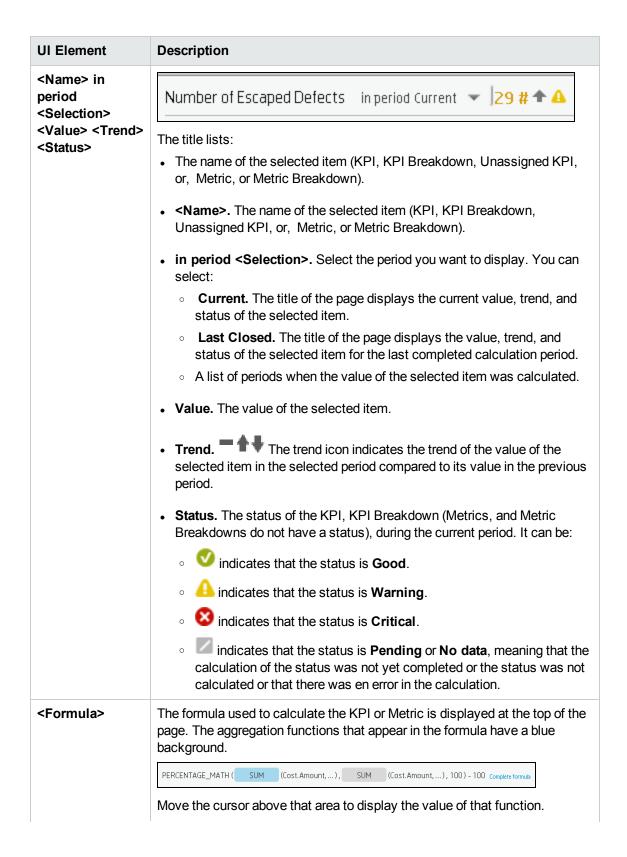
## UI Element Description Active KPIs × Actual Cost Actual Cost Pending **Advanced Search.** Opens additional fields to help you refine the component's filter: ℽ • Status: Select one of the All, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs area. When you select **No Data**, the search returns only the elements with no data. • Type: Select: • All. To display all the elements in the tree with the selected status. • **KPI.** To display only the KPIs with the selected status. Metric. To display a list of all the Metrics (the Status is changed to All). If you had selected a value in Status, and then you select Metric, then the Status field displays All, and becomes inaccessible. Objective. To display only the Objectives with the selected status, and their KPIs. Active Depending on how you accessed the Explorer tab, the pane lists all the Scorecards, **KPIs** Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, and Unassigned KPIs, active in the HP IT Executive Scorecard or a subset of these items. 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. Note: 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 **Refresh** button to display the Scorecard. 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. 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: The name of the item. The value of the item.

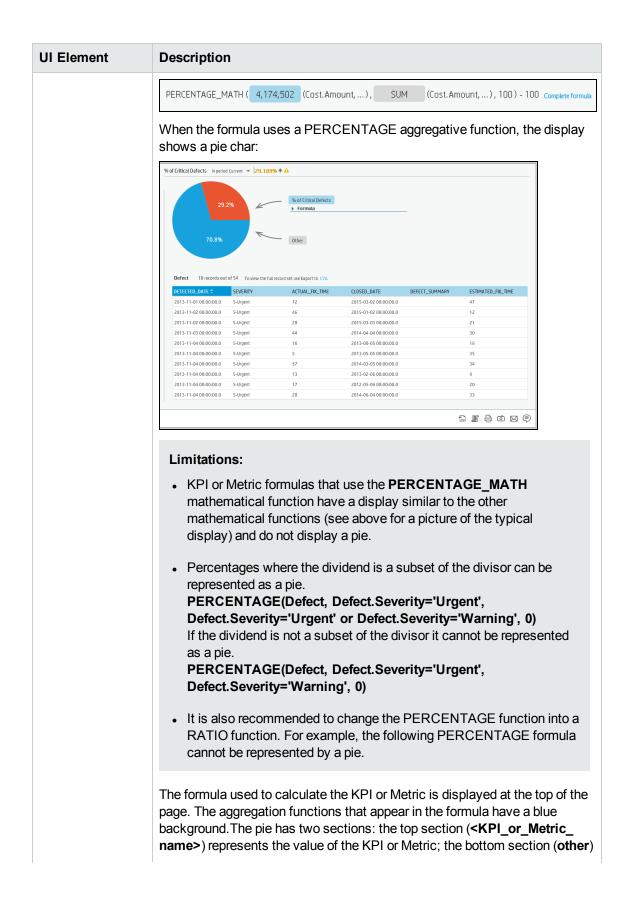
UI Element	Description
	• The trend icon indicates the trend of the value calculated over the current period.
	The status of the item, during the current period. It can be:
	• oindicates that the status is Good.
	A indicates that the status is <b>Warning</b> .
	indicates that the status is Critical.
	<ul> <li>indicates that the status is <b>Pending</b> and that the calculations have not yet been performed or completed.</li> </ul>

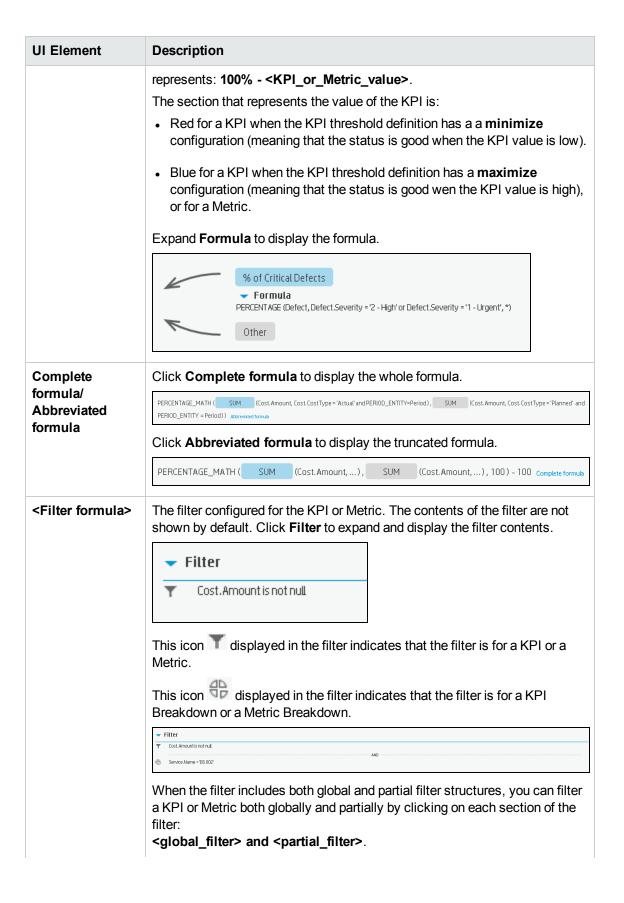
#### **Data Set**

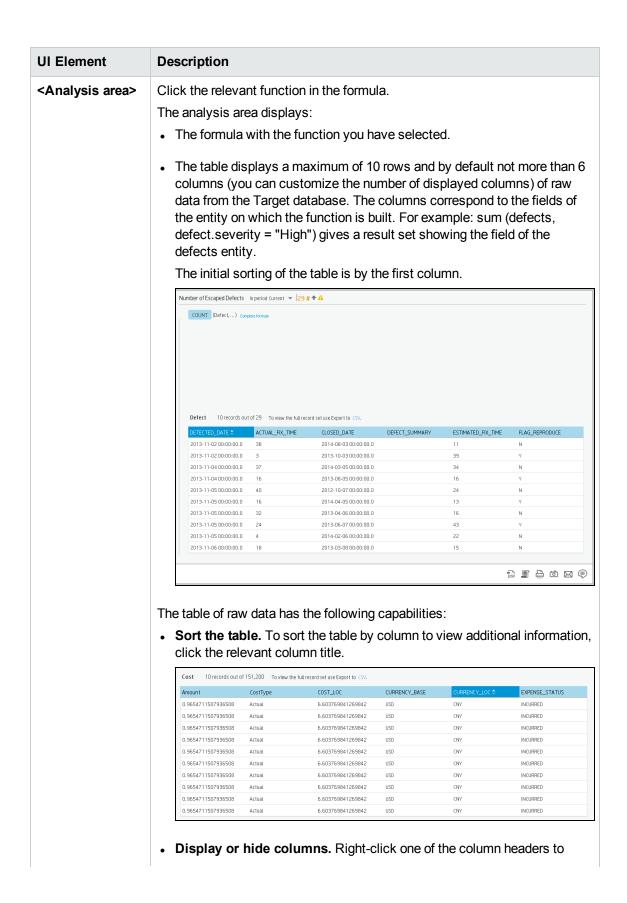


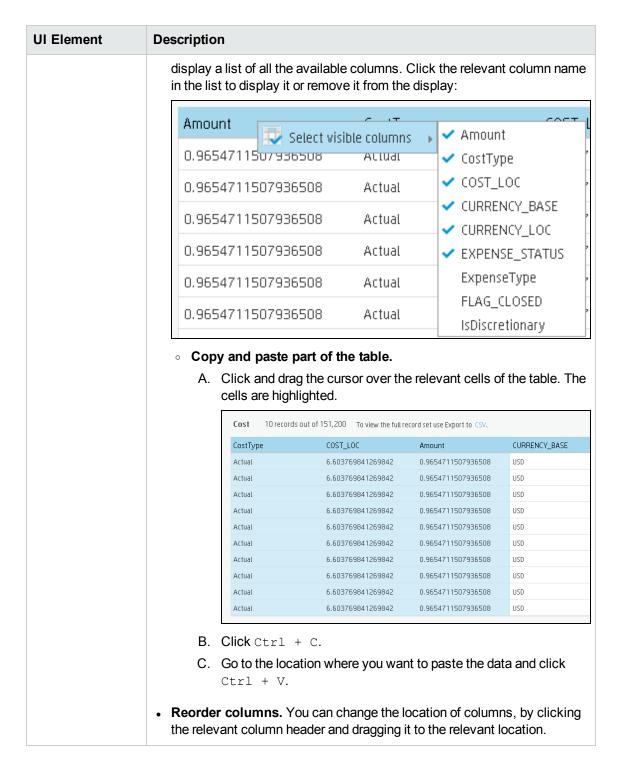
#### <Analysis area>











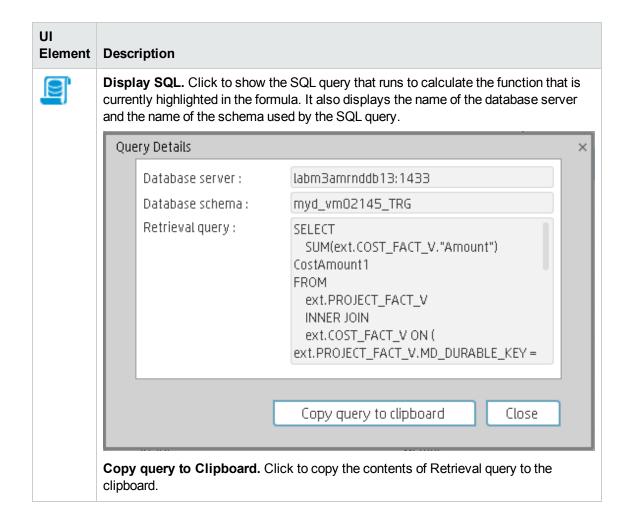
Toolbar

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

UI Element	Description
$\bowtie$	<b>Send mail.</b> Opens an Outlook email, with the name of the selected entity in the <b>Subject</b> box.
<b>6</b>	<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.
	<ul> <li>Print. Displays the Print dialog box where you can select the printer and how to print the content of the corresponding Explorer tab.</li> <li>The printout includes:</li> <li>The contents of the area that was selected while you clicked the button.</li> </ul>
	The Annotations Area.
	<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 "Annotations" on page 538.
	Click the button again to close the Annotation area.
	Note: The Show/Hide Annotations icon with a little + sign in the bottom toolbar indicates that a new annotation was added to the selected item during the past week.  The number of days during which the annotations are considered to be new is a setting that is configurable by your administrator in Admin > Scorecard > Dashboard Settings > Number of days annotations are considered new. For example, if the administrator gives the setting the value 14, then the + sign will indicate that the annotation was added in the last 2 weeks. The default is a week.

#### · Additional Buttons in Toolbar

UI Element	Description
Lcsv	<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.
	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.



# 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:

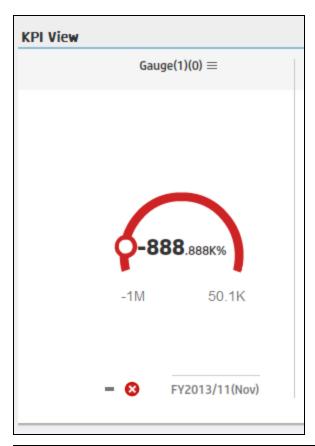
Click the **Explorer** tab to access detailed information about all the Scorecards, Objectives, Perspectives, KPIs, KPI Breakdowns, Metric, or Metric Breakdown that are active in Executive Studio. In the EXPLORER tab, click the relevant item and click the **Goal Map**button.



#### **Decimal precision**

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

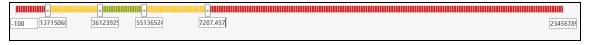
• Studio/Dashboard/Explorer Active Tree/Thresholds in Explorer. The values of KPIs and Metrics are displayed with a maximum of 6 digits and if needed a decimal point. Digits after the decimal point are rounded to 3 digits maximum. Digits before the decimal point are rounded to 3 digits maximum and K, 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:





This section includes:

# Access the Goal Map to display detailed information

To view more detailed information for a selected KPI:

- 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.
- 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 in the *Getting Started with IT Executive Scorecard*.

## 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 in the *Getting Started with IT Executive Scorecard*.

## 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" 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 in the *Getting Started with IT Executive Scorecard*.



#### **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.

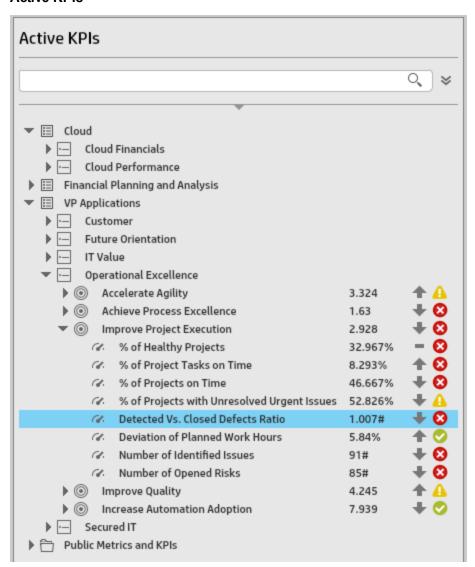
The Explorer - Goal Map page includes the following areas:

"Active KPIs" below

"Goal Map" on page 522

"Toolbar" on page 524

#### **Active KPIs**



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

## UI Element Description Enter the relevant string to display, in the tree, the nodes whose name includes the Q string. <Search> In addition, the child nodes of the filtered nodes are also listed even when the child node names do not include the string. If the display is filtered (in case you accessed the Explorer from one of the components in the Dashboard), the <Search> box displays information about the filter. For example: Active KPIs Actual Cost Actual Cost Pending **Advanced Search.** Opens additional fields to help you refine the component's filter: ℽ • Status: Select one of the All, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs area. When you select **No Data**, the search returns only the elements with no data. • Type: Select: • All. To display all the elements in the tree with the selected status. • **KPI.** To display only the KPIs with the selected status. • Metric. To display a list of all the Metrics (the Status is changed to AII). If you had selected a value in Status, and then you select Metric, then the Status field displays AII, and becomes inaccessible. Objective. To display only the Objectives with the selected status, and their KPIs. Active Depending on how you accessed the Explorer tab, the pane lists all the Scorecards, **KPIs** Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, and Unassigned KPIs, active in the HP IT Executive Scorecard or a subset of these items. 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. Note: 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 **Refresh** button to display the Scorecard.

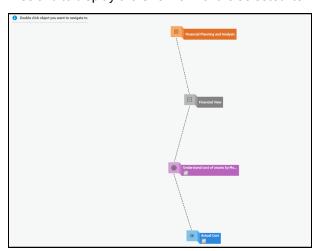
UI Element	Description	
	Click one of the Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs to display their detailed information in the other pane.	
	The area also displays on the right side of the Active KPIs pane, a subset of the following items depending on the type of item you selected:	
	The name of the item.	
	The value of the item.	
	• The trend icon indicates the trend of the value calculated over the current period.	
	The status of the item, during the current period. It can be:	
	• oindicates that the status is Good.	
	indicates that the status is <b>Warning</b> .	
	indicates that the status is Critical.	
	<ul> <li>indicates that the status is <b>Pending</b> and that the calculations have not yet been performed or completed.</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.



UI Element	Description
<name> in period <selection> <value> <trend> <status></status></trend></value></selection></name>	Number of Escaped Defects in period Current ▼  29 # ♠ ♠
	The title lists:
	The name of the selected item (KPI, KPI Breakdown, Unassigned KPI, or, Metric, or Metric Breakdown).
	<ul> <li><name>. The name of the selected item (KPI, KPI Breakdown, Unassigned KPI, or, Metric, or Metric Breakdown).</name></li> </ul>
	• in period <selection>. Select the period you want to display. You can select:</selection>
	<ul> <li>Current. The title of the page displays the current value, trend, and status of the selected item.</li> </ul>
	<ul> <li>Last Closed. The title of the page displays the value, trend, and status of the selected item for the last completed calculation period.</li> </ul>
	A list of periods when the value of the selected item was calculated.
	Value. The value of the selected item.
	Trend. 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.
	Status. The status of the KPI, KPI Breakdown (Metrics, and Metric Breakdowns do not have a status), during the current period. It can be:
	• Vindicates that the status is Good.
	indicates that the status is Warning.
	indicates that the status is Critical.
	<ul> <li>indicates that the status is Pending or No data, meaning that the calculation of the status was not yet completed or the status was not calculated or that there was en error in the calculation.</li> </ul>

UI Element	Description
Financial Planning and Analysis	Represents the parent Scorecard of the selected KPI, KPI Breakdown, or Unassigned KPI.  The name of the Scorecard is displayed near the icon.
Financial View	Represents the parent Perspective of the selected KPI, KPI Breakdown, or Unassigned KPI.  The name of the Perspective is displayed near the icon.
Understand cost of assets by Mo	<ul> <li>Represents one of the following:</li> <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>
Actual Cost	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

UI Element	Description
$\bowtie$	<b>Send mail.</b> Opens an Outlook email, with the name of the selected entity in the <b>Subject</b> box.
Ö	<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.
	<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.
	The printout includes:
	The contents of the area that was selected while you clicked the button.
	The Annotations Area.
	<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 "Annotations" on page 538.
	Click the button again to close the Annotation area.

UI Element	Description
	Note: The Show/Hide Annotations icon with a little + sign in the bottom toolbar indicates that a new annotation was added to the selected item during the past week.  The number of days during which the annotations are considered to be new is a setting that is configurable by your administrator in Admin > Scorecard > Dashboard Settings > Number of days annotations are considered new. For example, if the administrator gives the setting the value 14, then the + sign will indicate that the annotation was added in the last 2 weeks. The default is a week.

## **Forecast**

Executive Scorecard provides information regarding the status and values of Objectives, KPIs, or Metrics on the past and current periods in the Dashboard and Explorer tabs. The Forecast tab in Explorer provides a glimpse into the future by forecasting the entity future behavior, based on historical data, so you will be able more easily understand the underlying trend and to do all you can now to improve or maintain the desired behavior.

You can view the forecast of the upcoming future of the selected Objectives, KPIs, or Metrics (for which you have permission), in a period of up to 1 year from the current period.

The Forecast button is enabled only when you have the **Forecast** permission. 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 Objective, KPI, or Metric, and click the **Forecast**button.

Learn More Tasks UI Description



#### Calculation method for forecast

The correctness of the forecast calculation is based on the historical data of the entity and is calculated using the DoubleExponentialSmoothingModel algorithm. The more data there is the more precise the forecast is.

• 
$$f_t = \alpha . Y_t + (1 - \alpha)(f_{t-1} + b_{t-1})$$

• 
$$b_t = \gamma . (f_t - f_{t-1}) + (1 - \gamma) . b_{t-1}$$

where:

 $\cdot$   $\mathbf{Y}_{\mathbf{t}}$  is the observed value at time t.

- f<sub>t</sub> is the forecast at time t.
- b<sub>t</sub> is the estimated slope at time t.
- $\alpha$  (alpha) is the first smoothing constant, used to smooth the observations. Its value is: 0.6.
- γ (gamma) is the second smoothing constant, used to smooth the trend. Its value is: 0.6.

To forecast:

$$f_{t+m} = f_t + mb_{t-m}$$
  
where m=1 (The time interval).

The initial point is:  $f_1 = y_1$ ;  $b_1 = y_2 - y_1$ 

#### Minimum historical data

The best forecasts are based on a large amount of historical data.

To provide the best forecast using the above algorithm, the calculation relies on as much historical data as is available. The following table indicates what are the minimum historical periods needed to calculate a certain future period.

Future Period	Minimum historical data to calculate single future period	Maximum period possible for this periodicity	Maximum historical data to calculate maximum future period
1 day	30 days	14 days	420 days
1 week	12 weeks	4 weeks	48 weeks
1 month	12 months	3 months	36 months
1 quarter	6 quarters	3 quarters	18 quarters
1 year	3 years	3 years	9 years

#### Limitations

If you select a forecast period that cannot be calculated due to the lack of data, the error message **The minimum requirements to calculate the forecast for this period are insufficient** is issued, and the forecast calculation is not performed. When the historical data is less than the value of the **Minimum historical data to calculate single future period**, the Forecast is not calculated.

So for a yearly KPI, only when the historical data is less than 3 years, there will be insufficient data to calculate a 3 years, 2 years, and 1 years forecast.

If the selected item (KPI, Objective, or Metric) has historical data but it has not been calculated for the current period, the item is considered invalid, and the **Forecast** button is disabled.



## View the forecast of a entity

To view the forecast of an entity:

- 1. Click Explorer.
- Select the relevant entity in the Active KPIs pane, and click Forecast.The tab is enabled only when you have the Forecast permission.
- 3. Select **Current Mode** in the in period <period> in the title of the page.
- 4. In the Forecast page, select the Forecast period:
  - a. For Day Periodicity the list should present the dates of the upcoming 14 days in days granularity.
  - b. For Week Periodicity the list should present the dates of the upcoming 4 weeks in weeks granularity.
  - c. For Month Periodicity the list should present the dates of the upcoming 3 Months forecast in months granularity.
  - d. For Quarter Periodicity the list should present the dates of the upcoming 3 quarters forecast in quarter granularity.
  - e. For Year Periodicity the list should present the dates of the upcoming 3 Years forecast in years granularity.

The forecast calculation is then performed.

## Use cases

#### Use Case #1 - View a 3 months forecast for a KPI:

While checking the current status of a KPI, you noticed that there is a trend that indicates that the KPI threshold is about to be breached. Since it is very important to make sure that the KPI state stays as stable as possible during the upcoming 3 months, open Explorer, select the KPI and click the **Forecast** tab to see how the KPI is supposed to behave in the upcoming 3 months. You note that it is possible that during the next month, the KPI will be breached. You cannot wait any longer and make a drastic change so the KPI results improve immediately.

Use Case #2 – View 14 days forecast for an Objective with insufficient historical data: You want to check the forecast of an Objective in the upcoming 14 days (all the KPIs under the objective are daily). Open Explorer, select the Objective, click Forecast, and set the Forecast period to 14 days ahead. Once the selection is done, the system notifies you that there is insufficient historical data to calculate the desired future period. You then decide to recalculate the Objective to ensure there are more than 30 days history data for this Objective.



#### **EXPLORER Tab - Forecast**

**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.

**Note:** The **Forecast** button is displayed only if you have the correct permission.

The Explorer - Forecast page includes the following areas:

"Active KPIs" below

"Forecast" on page 530

"Toolbar" on page 536

#### **Active KPIs**



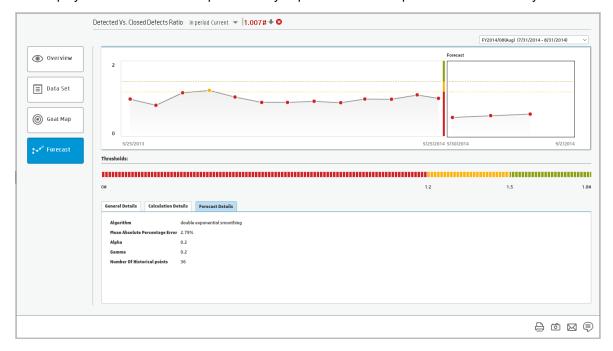
User interface elements are described below (when relevant, unlabeled elements are shown in angle brackets):

## UI Element Description Enter the relevant string to display, in the tree, the nodes whose name includes the Q string. <Search> In addition, the child nodes of the filtered nodes are also listed even when the child node names do not include the string. If the display is filtered (in case you accessed the Explorer from one of the components in the Dashboard), the <Search> box displays information about the filter. For example: Active KPIs Actual Cost Actual Cost Pending **Advanced Search.** Opens additional fields to help you refine the component's filter: ℽ • Status: Select one of the All, Good, Warning, Critical, or No Data values to display only the elements with the selected status, in the Active KPIs area. When you select **No Data**, the search returns only the elements with no data. • Type: Select: • All. To display all the elements in the tree with the selected status. • **KPI.** To display only the KPIs with the selected status. • Metric. To display a list of all the Metrics (the Status is changed to AII). If you had selected a value in Status, and then you select Metric, then the Status field displays AII, and becomes inaccessible. Objective. To display only the Objectives with the selected status, and their KPIs. Active Depending on how you accessed the Explorer tab, the pane lists all the Scorecards, **KPIs** Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, and Unassigned KPIs, active in the HP IT Executive Scorecard or a subset of these items. 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. Note: 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 **Refresh** button to display the Scorecard.

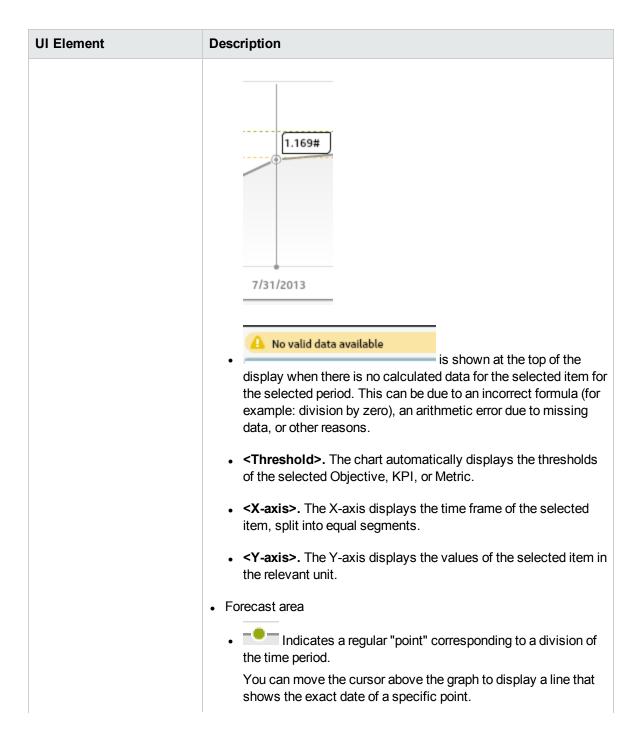
UI Element	Description
	Click one of the Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs to display their detailed information in the other pane.
	The area also displays on the right side of the Active KPIs pane, a subset of the following items depending on the type of item you selected:
	The name of the item.
	The value of the item.
	• The trend icon indicates the trend of the value calculated over the current period.
	The status of the item, during the current period. It can be:
	• oindicates that the status is <b>Good</b> .
	A indicates that the status is <b>Warning</b> .
	indicates that the status is Critical.
	<ul> <li>indicates that the status is <b>Pending</b> and that the calculations have not yet been performed or completed.</li> </ul>

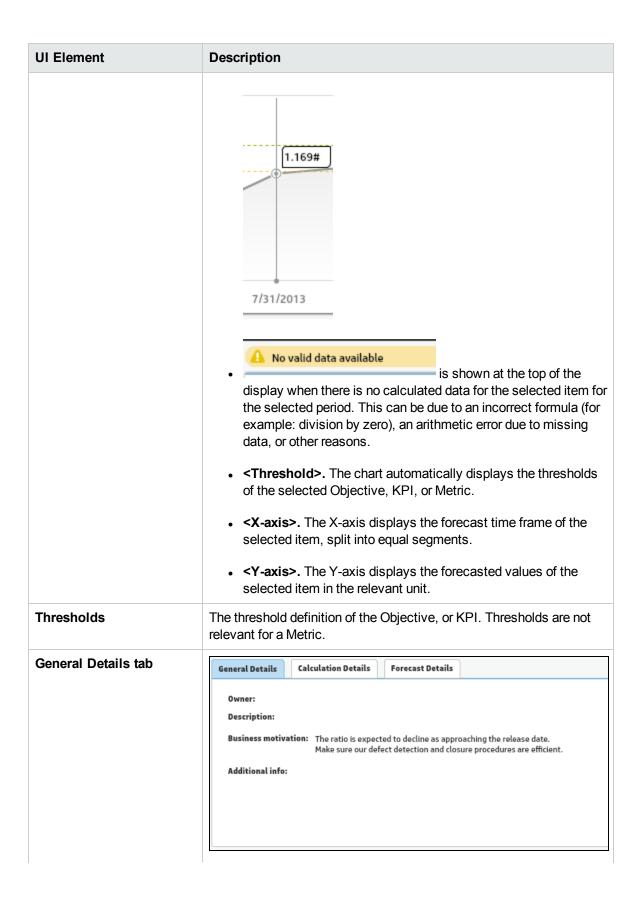
#### Forecast

The display of the Forecast for a specific entity depends on the user permission for the entity.



UI Element	Description
<name> in period <selection> <value> <trend> <status></status></trend></value></selection></name>	Avg Delivery Time of New Products or Services (Months) in period Current ▼ 2.736 ■ ◆  The title lists:  • <name>. The name of the selected entity (Objective, KPI, or Metric).  • Value. The value of the selected item.  • Trend. 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.  • Status. The status of the KPI, KPI Breakdown (Metrics, and Metric Breakdowns do not have a status), during the current period. It can be:  • Indicates that the status is Good.  • Indicates that the status is Warning.  • Indicates that the status is Pending or No data, meaning that the calculation of the status was not yet completed or the status was not calculated or that there was en error in the calculation.</name>
<date list=""></date>	Note: Make sure that Current Mode is selected in the in period <period> in the title of the Overview page.  The list of periods that is displayed corresponds to the periods for which the forecast can be calculated based on the available historical data.</period>
<graph format=""></graph>	Historical data (left-hand area):     Indicates a regular "point" corresponding to a division of the time period.     You can move the cursor above the graph to display a line that shows the exact date of a specific point.





UI Element	Description
	<b>Owner.</b> The owner of the entity (Objective, KPI, or Metric) selected in the Active KPIs pane.
	<b>Description.</b> The description of the entity selected in the Active KPIs pane.
	<b>Business Motivation.</b> The business motivation of the KPI selected in the Active KPIs pane.
	<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.
	When an Objective, KPI, or Metric has been assigned a Dashboard page in Additional Info, and if you change the name of the page in the Dashboard, the change is not reflected in Explorer. Explorer is updated only after the cache is refreshed for example by editing in the Studio or by performing a calculation.
	Note for the System Administrator: Xcelsius and BO Reports can be added as Additional Info in the Objective, KPI, or Metric when the parameter bo.in.use is configured as true in the SETTINGS_MANAGEMENT table in the Management database.
Calculation Details tab	The tab displays the configuration of the Objective, KPI, or Metric as it appears in the Studio.
	General Details Calculation Details Forecast Details
	Unit: #
	Calculation period: Monthly  Business Context: ALM_DefectDemo
	KPI Formula: RATIO_MATH(COUNT(Defect, Defect.ClosedDate IN_PERIOD),COUNT(Defect, Defect.DetectedDate IN_PERIOD))
	Filter: Comments:
	<b>Unit.</b> The unit of the Metric, KPI, or KPI Breakdown or Metric Breakdown.
	<b>Calculation Period.</b> The period of the Objective, Metric, KPI, or KPI Breakdown.
	<b>Business Context.</b> The context assigned to the Metric, KPI, or KPI Breakdown or Metric Breakdown.
	<b>KPI/Metric Formula.</b> The formula used to calculate the KPI/Metric value.
	Filter. The filter assigned to the KPI/Metric.
	Comments. The comments added to the KPI/Metric definition.

UI Element	Description				
	Calculated Using. The type of rule used to calculate the Objective's score according to the score of its children. It can be:				
	<ul><li>KPIs) or of the 0</li><li>Best child. The assigned to the</li></ul>	parent Objectiv Objectives assign Objective scorparent Objectiv	re (whe gned to re is the re (whe	n the Objective ha the parent Object	is child ive. the KPIs is child
	Weighted aver scores of the KF the relevant wei average of the s relevant weights additional colum weight of each of	age. The Objective en you select the course of the characteristic (Weight) which ild (Objective en you select the characteristic).	etive so the pa bjectiv ild Obje lect thi ere the or KPI nis valu		of the tiplied by ives, the by the b, an e the average
Forecast Details tab	The tab displays the configuration of the Objective, KPI, or Metric as it appears in the Studio.				
	General Details	Calculation De	tails	Forecast Details	
	Algorithm		double	exponential smoothi	ing
	Mean Absolute F	ercentage Error	2.79%		
	Alpha		0.2		
	Gamma		0.2		
	Number Of Histo	rical points	36		
	Algorithm. The na method for forecas	_		or details, see "Ca	alculation
	Mean Absolute P the forecast results	_			•
	Alpha. The value used for the Alpha parameter in the algorithm.				
	Gamma. The value	e used for the G	Samma	parameter in the a	algorithm.
	Number of Histor	rical Points.Th	e numl	per of historical po	ints used in

UI Element	Description
	the calculation.

## Toolbar

UI Element	Description
$\bowtie$	<b>Send mail.</b> Opens an Outlook email, with the name of the selected entity in the <b>Subject</b> box.
	<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.
	<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.
	The printout includes:
	The contents of the area that was selected while you clicked the button.
	The Annotations Area.
<b>(</b>	<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 "Annotations" on page 538.
	Click the button again to close the Annotation area.
	Note: The Show/Hide Annotations icon with a little + sign in the bottom toolbar indicates that a new annotation was added to the selected item during the past week.  The number of days during which the annotations are considered to be new is a setting that is configurable by your administrator in Admin > Scorecard > Dashboard Settings > Number of days annotations are considered new. For example, if the administrator gives the setting the value 14, then the + sign will indicate that the annotation was added in the last 2 weeks. The default is a week.

## **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:







- 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.

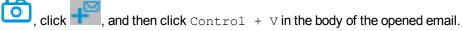


This section includes:

# 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





5. The annotation is added to the list.

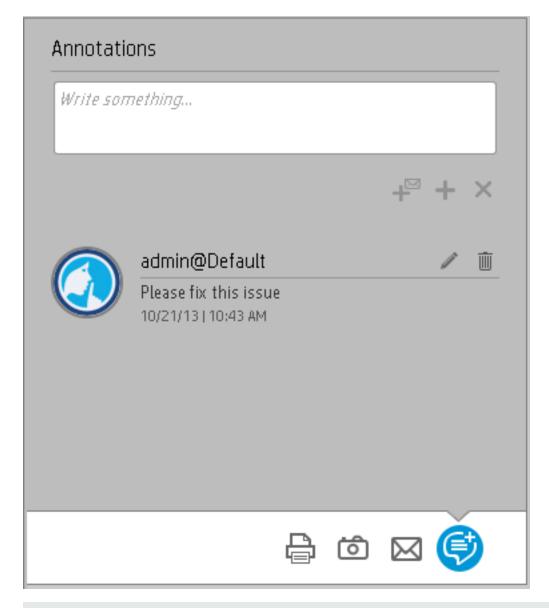


# Send annotations by email

- 1. In the EXPLORER tab, click the relevant item in the Active KPIs tree.
- 2. Write the annotation and click

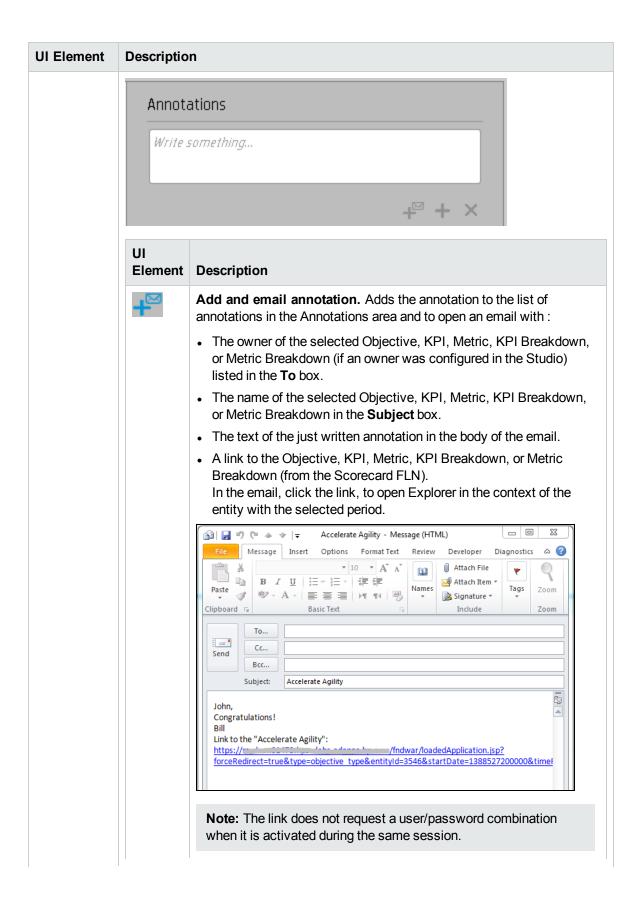


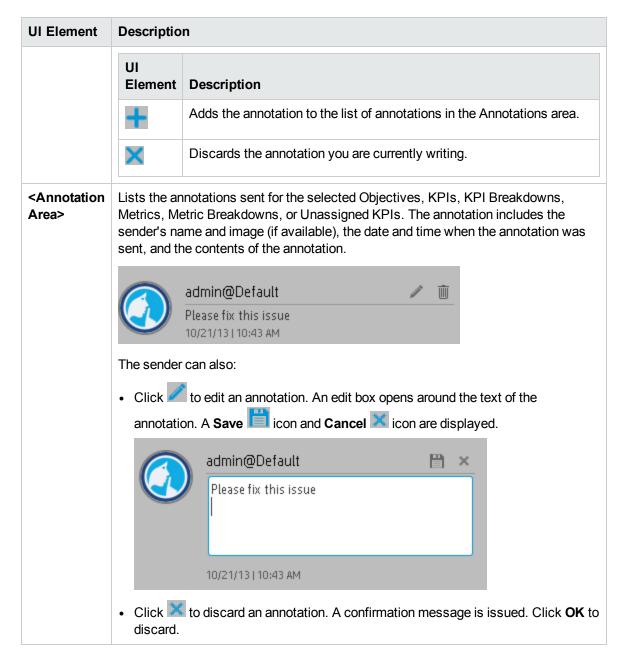
#### **Annotations**



**Note:** This area is displayed only for Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Unassigned KPIs.

UI Element	Description
<annotation box=""></annotation>	Enter your annotation, and click <b>Add Annotation</b> to add the annotation to the list of annotations in the Annotation area.





#### Toolbar

UI Element	Description	
$\bowtie$	<b>Send mail.</b> Opens an Outlook email, with the name of the selected Objective, KPI, Metric, KPI Breakdown, or Metric Breakdown in the <b>Subject</b> box.	

UI Element	Description
<b>6</b>	<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.
	<ul> <li>Print. Displays the Print dialog box where you can select the printer and how to print the content of the corresponding EXPLORER tab.</li> <li>The printout includes:</li> <li>The contents of the area that was selected while you clicked the button.</li> <li>The Annotations Area.</li> </ul>
<b>(</b>	Show/Hide Annotations. 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 "Annotations" on page 538.  Click the button again to close the Annotation area.
	Note: The Show/Hide Annotations icon with a little + sign in the bottom toolbar indicates that a new annotation was added to the selected item during the past week.  The number of days during which the annotations are considered to be new is a setting that is configurable by your administrator in Admin > Scorecard > Dashboard Settings > Number of days annotations are considered new. For example, if the administrator gives the setting the value 14, then the + sign will indicate that the annotation was added in the last 2 weeks. The default is a week.

# Send Documentation 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 9.50)

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.

We appreciate your feedback!



