

# HP XS for Smartphone

For the Windows® operating system

Software Version: 1.00

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## Getting Started Guide

Document Release Date: January 2012

Software Release Date: January 2012



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## HP IT Executive Scorecard on a Smartphone (XS for Smartphone Mini App) Overview

XS for Smartphone allows executives to access significant business information anytime and anywhere. The mini app is designed to focus on those Business Objectives and Key Performance Indicators (KPIs) that are critical to the business success. Executives can view the up-to-date and over-time results for the relevant Objectives and KPIs. Using annotations, they can communicate and collaborate with their colleagues to improve these results. Any performance degradation sends notifications to the responsible people via proactive alerts.

The XS for Smartphone mini app enables you to select the relevant Scorecard to view your objective's statuses and trends. You can then drill down, to more detailed information about the KPIs, their values, statuses, trends, and performance over time.

You can also add, edit, or view annotations added to specific KPIs by other senior management. You can send these annotations to the relevant recipient.

## Getting Started with the XS for Smartphone Mini App

The mini app is the mobilized version of the HP IT Executive Scorecard.

As stakeholders of HP IT Executive Scorecard, when you work outside of an office or without VPN access, you can perform the necessary actions without having to log on to HP IT Executive Scorecard from your mobile devices.

Once you have downloaded and installed HP Anywhere and the relevant mini app, you can log in to HP Anywhere to access available services, including a summary view for each mini app that is applicable to your job role, the capability of drilling down to more details about the relevant Scorecard, and KPIs, a Front Page that displays alerts related to the KPIs you are tracking, and the capability to communicate and cooperate with other Executives using annotations.

## Audience

This document is designed for the following audience:

- The administrator. For details, see "[Install and Configure XS for Smartphone](#)" (on page 8). Note that the administrator can be the HP Anywhere administrator or the Executive Scorecard administrator or both roles can be combined.
- The Executive end-user. For details, see "[How to Use XS for Smartphone](#)" (on page 9).

## Related Information

The following documents include additional information related to HP Anywhere and the XS for Smartphone and XS for Tablet mini apps:

- *HP Anywhere Installation and Configuration Guide*
- *HP Anywhere Administrator Guide*

These documents are available in the [HP Live Network](https://h20117.www2.hp.com/wiki/) site (https://h20117.www2.hp.com/wiki/).

For more information related to HP IT Executive Scorecard, see the following documents:

- *IT Executive Scorecard Installation and Configuration Guide*
- *General Admin Guide*
- *Data Warehouse Admin Guide*
- *IT Executive Scorecard Admin Guide*
- *IT Executive Scorecard Troubleshooting Guide*
- *IT Executive Scorecard Universe ERDs Guide*
- *IT Executive Scorecard Release Notes*
- *IT Executive Scorecard Support Matrix*

These documents are available in the HP IT Executive Scorecard DVD or on the [Documentation Support Site](http://h20230.www2.hp.com/selfsolve/manuals) (http://h20230.www2.hp.com/selfsolve/manuals).

## Install and Configure XS for Smartphone

**Note:** This section's audience is the administrator.

This section provides information about the system requirements and how to install and configure XS for Smartphone.

### Requirements

**Version:**

- HP Anywhere 9.00
- XS for Smartphone 1.00
- HP IT Executive Scorecard 9.02 and above

**Platform:**

- Android 2.2 and above
- iOS 4.0 and later

**Supported devices:** Smartphones

### Install and Configure XS for Smartphone

The XS for Smartphone mini app runs on the HP Anywhere platform.

To configure XS for Smartphone:

1. If needed, install HP Anywhere from the HPLN publisher at <https://hpln.hp.com>. For installation details, see *HP Anywhere Installation and Configuration Guide*.
2. If needed, install HP IT Executive Scorecard. For details, see *IT Executive Scorecard Installation and Configuration Guide*.
  - a. Make sure that your organization is using the HP IT Executive Scorecard version that supports the XS for Smartphone mini app.
  - b. Create an HP IT Executive Scorecard user account with necessary access grants.
3. Configure the HP Anywhere server and the relevant mini app by specifying the HP IT Executive Scorecard hostname when configuring HP IT Executive Scorecard as a possible data source for the XS for Smartphone mini-app. For details, see *HP Anywhere Administrator Guide*.
4. Create in HP Anywhere, an HP Anywhere user account with which to log in to HP Anywhere client from your mobile device. The user account information should include user name, password, HP Anywhere server address, and port number. The user name and password should be the same user name and password as the ones used to access HP IT Executive Scorecard.
5. Publish the download link to your users (the URL is extracted from the given war file). The format used to distribute this URL depends on the customer (SMS, email, QR, and more).



## How to Use XS for Smartphone

**Note:** This section audience is the Executive user.

Use the XS for Smartphone mini app to display the relevant Scorecard and to view the statuses and trends of the Business Objectives you are interested in. You can then drill down to more detailed information about the Key Performance Indicators (KPIs), their values, statuses, trends, and performance over time. You can also add, edit, or view annotations added to specific KPIs by other senior management.

The Client home page (Summary page) provides a summary view for each mini app that is applicable to your job role. This view provides enough information at a glance to make quick decisions and decide if you need to look at more data.

Urgent issues that require attention are listed on a Front Page view provided by the Client. This view spans all mini apps installed on the Client making it easy to prioritize tasks. In addition, any alerts that have occurred are shown on the Front Page. From the Front Page view, you can link directly to the point in a mini app where an action can take place.

This section includes the following topics:

- ["Prerequisites for Using the XS for Smartphone Mini App" \(on page 9\)](#)
- ["Configure the Mini App" \(on page 10\)](#)
- ["Configure the Mini App Alerts" \(on page 12\)](#)
- ["View Scorecards and KPIs Over Time Performance and Related Information" \(on page 14\)](#)
- ["Access Other Mini Apps" \(on page 16\)](#)

### Prerequisites for Using the XS for Smartphone Mini App

Before you can log in to HP Anywhere on your mobile device for the first time, the following items should be installed and configured:

- HP Anywhere is installed.
- HP IT Executive Scorecard is installed.
- The administrator has created for you an HP Anywhere user account with which to log in to HP Anywhere client from your mobile device. The user account information includes a user name, password, HP Anywhere server address, and port number. The user name and password should be the same user name and password as the ones used to access HP IT Executive Scorecard.
- Your mobile device has Internet connection.

You can now log in to HP Anywhere and use the XS for Smartphone mini app from your mobile device.


As a first time user, you need to initialize or complete some required settings on your mobile device before you can continue. For details, see ["Configure the Mini App" \(on page 10\)](#).

You can view requests and perform request approval actions. For details, see ["View Scorecards and KPIs Over Time Performance and Related Information" \(on page 14\)](#).





You can configure alerts to show on the Front Page of your mobile device for issues you are tracking. For details, see ["Configure the Mini App Alerts" \(on page 12\)](#).

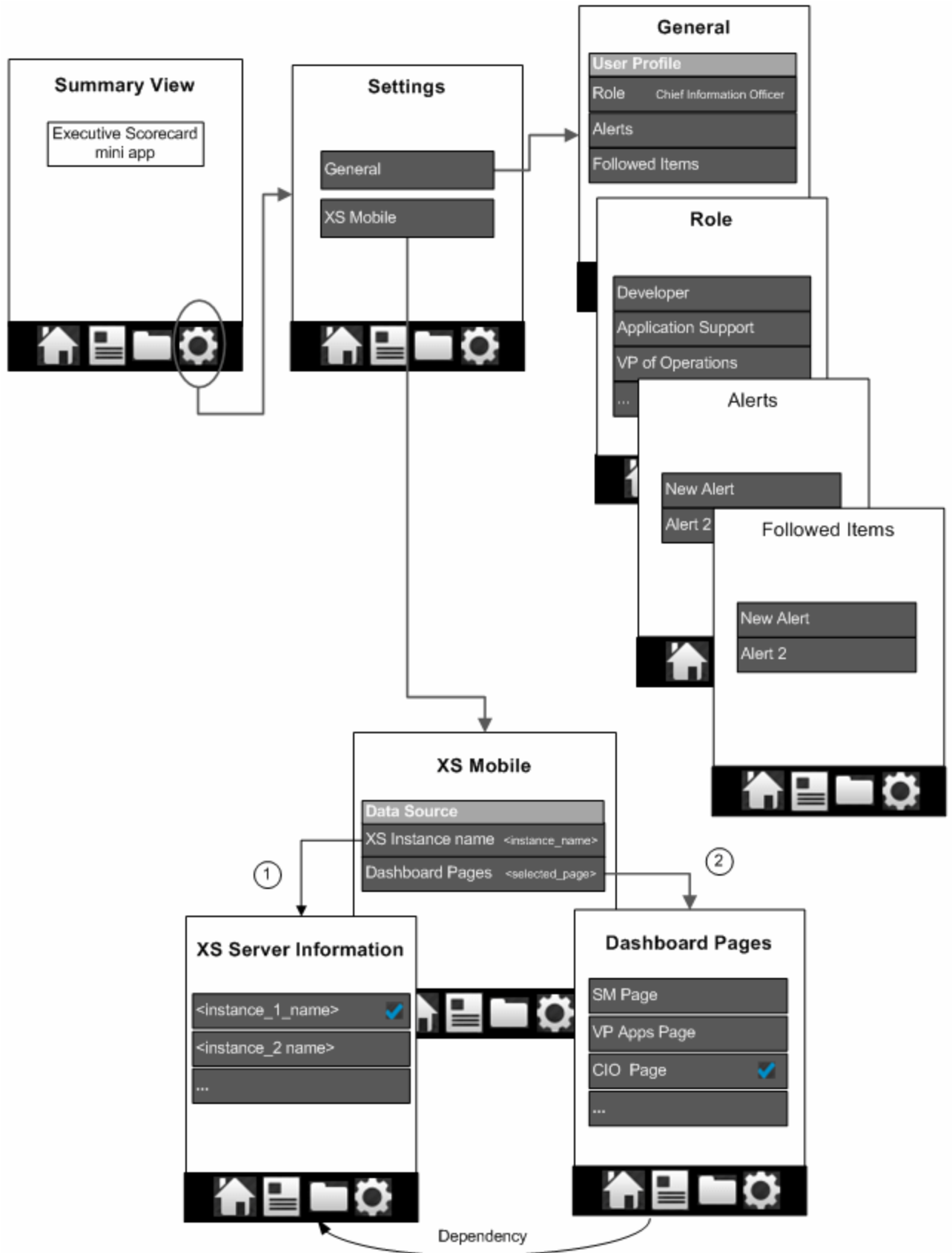
## Configure the Mini App

To configure the mini app:

1. Tap the HP Anywhere icon.
2. Enter the user,password, and URL of HP Anywhere (the first time the user accesses the mini app).
3. The **Summary View** displays a list of the mini apps installed on your Smartphone and a toolbar.
  - a. Tap .
  - b. Tap **General** to configure the **Role**, **Alerts**, and **Followed Items**, or tap **XS Mobile** to select the **XS Instance** and **Dashboard pages** (CIO, VP Apps, and more).



**Note:** In each page, the toolbar enables you to access other pages in the mini app:

-  to go back to the Summary View from all the other pages.
-  to access the Front Page. For details, see ["Configure the Mini App Alerts" \(on page 12\)](#) or ["View Scorecards and KPIs Over Time Performance and Related Information" \(on page 14\)](#).
-  to view a list of the other mini apps. For details, see ["Access Other Mini Apps" \(on page 16\)](#).
-  to access the Settings page where you can configure the XS for Smartphone mini app. See below for more information.




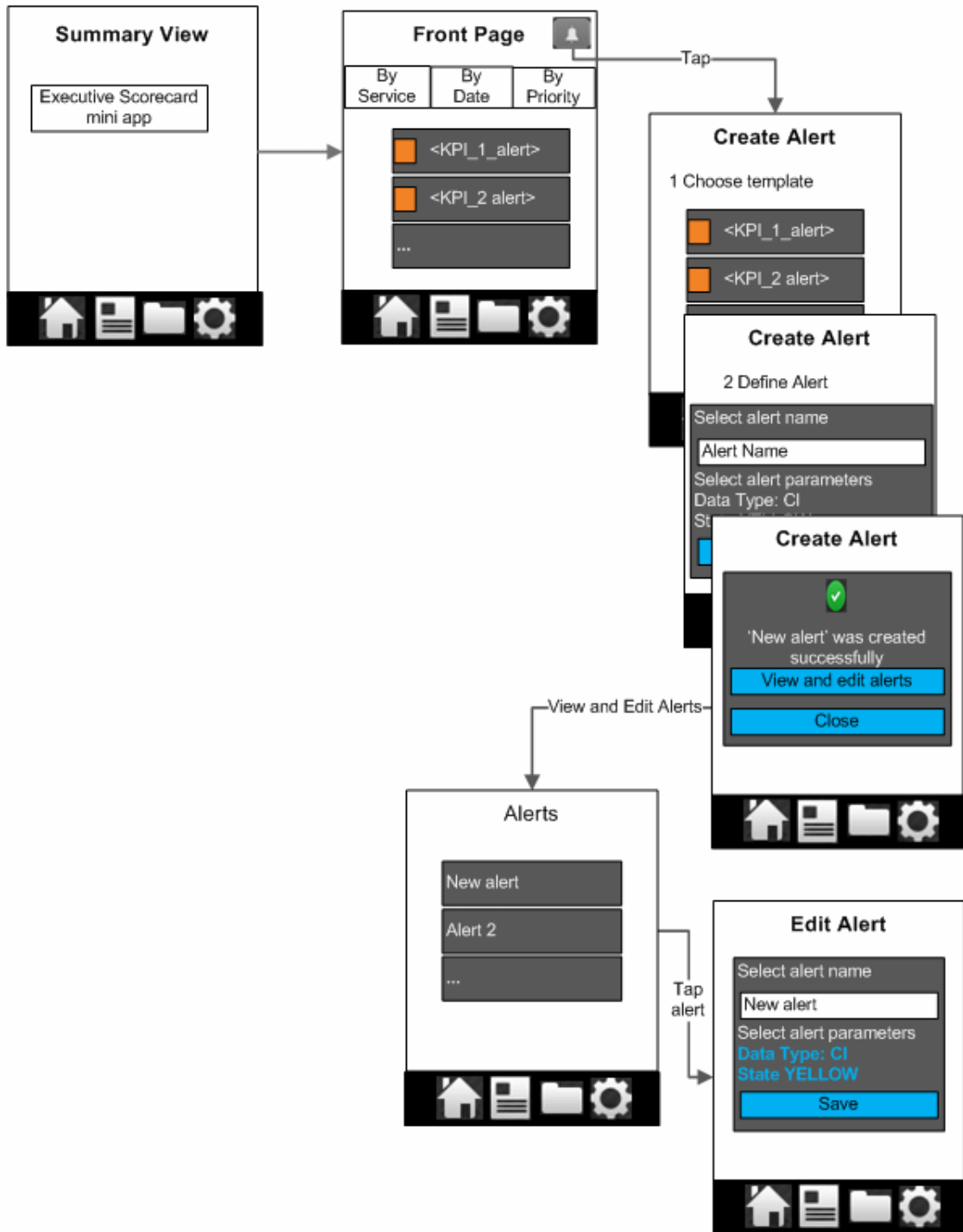
## Configure the Mini App Alerts

To view the alerts by service, date, or priority:

1. Tap the HP Anywhere icon.
2. Enter the user, password, and URL of HP Anywhere (the first time the user accesses the mini app).
3. In the **Summary View**, tap the mini app or  to display the alert information.
4. Tap  to configure, view, or edit the alerts.

To configure, view, or edit the alerts:

1. Tap the HP Anywhere icon.
2. Enter the user, password, and URL of HP Anywhere (the first time the user accesses the mini app).
3. In the **Summary View**, tap  to open the alert wizard.



The Summary Page displays a column graph representing either Objectives by Status or KPIs by Status.

The Objectives displayed in the Summary Page with the Objectives by Status format, are the Objectives included in the Scorecard component appearing on the current Executive user Dashboard page.

The Summary Page with the KPIs by Status format displays all the KPIs selected to be displayed in the KPI View, KPI List, Historical View, or KPI Rolodex components appearing on the current Executive user Dashboard page, except for the Scorecard component.

The Front Page displays all the KPIs selected to be displayed in the KPI View, KPI List, Historical View, or KPI Rolodex components appearing on the current Executive user Dashboard page, except for the Scorecard component, that have a red status (critical).

Note that KPIs displayed by drilling into an Objective or KPI on the current Executive user Dashboard page, or KPIs that appear in another component on the page, only when clicking an Objective in the Scorecard (wiring) are not displayed in the Summary Page or the Front Page.

You can create an alert template using a KPI with red status to view, in the Front Page, all the KPIs with a status that changed to red.


You can select to follow a specific KPI by swiping it in the Front Page and tapping **Follow this item** (the Executive user can also follow a specific KPI using the Followed Item setting, for details, see ["Configure the Mini App" \(on page 10\)](#)). If this KPI changes status to normal, it disappears from the Front Page.

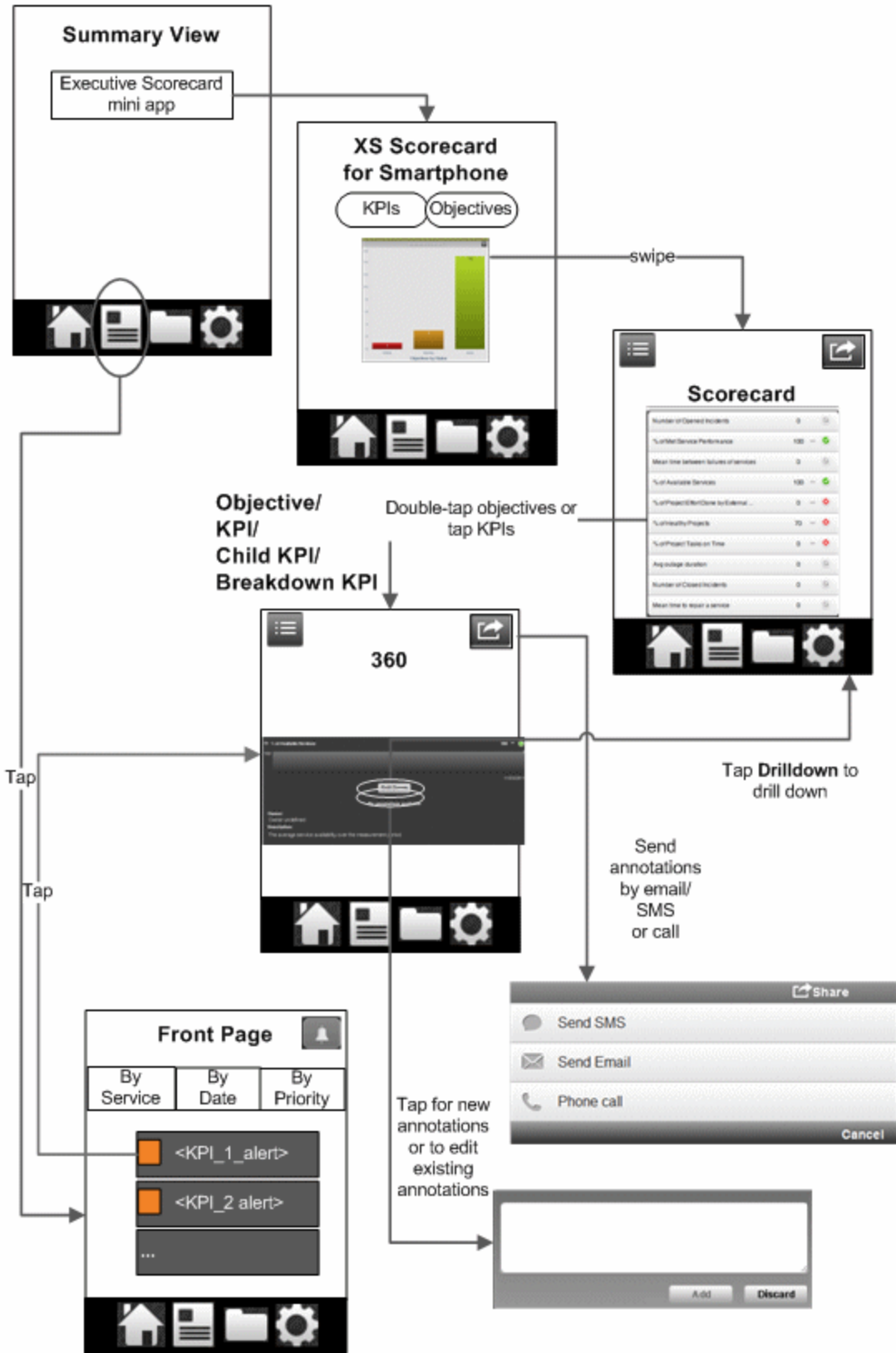
## View Scorecards and KPIs Over Time Performance and Related Information

To view Scorecards and KPI over time performance and related information:

1. Tap the HP Anywhere icon.
2. Enter the user, password, and URL of HP Anywhere (the first time the user accesses the mini app).
3. In the **Summary View**:
  - a. Tap the mini app to view the XS Scorecard for Mobile by KPIs or by Objectives.
  - b. Swipe the graph or tap one of the bars to display the **Scorecard** page.
  - c. Drill down to the **360** view by double-tapping the Objectives or tapping the KPIs. The 360 view displays over time information about the Objective or KPI, child KPIs information, configuration information, and annotations.
  - d. You can now add, delete, or edit annotations.

To view alert-related Scorecard and KPIs over time performance and related information:

1. Tap the HP Anywhere icon.
2. Enter the user, password, and URL of HP Anywhere (the first time the user accesses the mini app).
3. In the **Summary View**:
  - a. Tap  to access the **Front Page** to view the alerts that were sent to the user.
  - b. Tap an alert to display its **360** view including over time information about the Objective or KPI, child KPIs information, configuration information, and annotations.



The Summary Page displays a column graph representing either Objectives by Status or KPIs by Status.

The Objectives displayed in the Summary Page with the Objectives by Status format, are the Objectives included in the Scorecard component appearing on the current Executive user Dashboard page.

The Summary Page with the KPIs by Status format displays all the KPIs selected to be displayed in the KPI View, KPI List, Historical View, or KPI Rolodex components appearing on the current Executive user Dashboard page, except for the Scorecard component.

The Front Page displays all the KPIs selected to be displayed in the KPI View, KPI List, Historical View, or KPI Rolodex components appearing on the current Executive user Dashboard page, except for the Scorecard component, that have a red status (critical).


Note that KPIs displayed by drilling into an Objective or KPI on the current Executive user Dashboard page, or KPIs that appear in another component on the page, only when clicking an Objective in the Scorecard (wiring) are not displayed in the Summary Page or the Front Page.

You can create an alert template using a KPI with red status to view, in the Front Page, all the KPIs with a status that changed to red.


You can select to follow a specific KPI by swiping it in the Front Page and tapping **Follow this item** (the Executive user can also follow a specific KPI using the Followed Item setting, for details, see ["Configure the Mini App" \(on page 10\)](#)). If this KPI changes status to normal, it disappears from the Front Page.

## Access Other Mini Apps

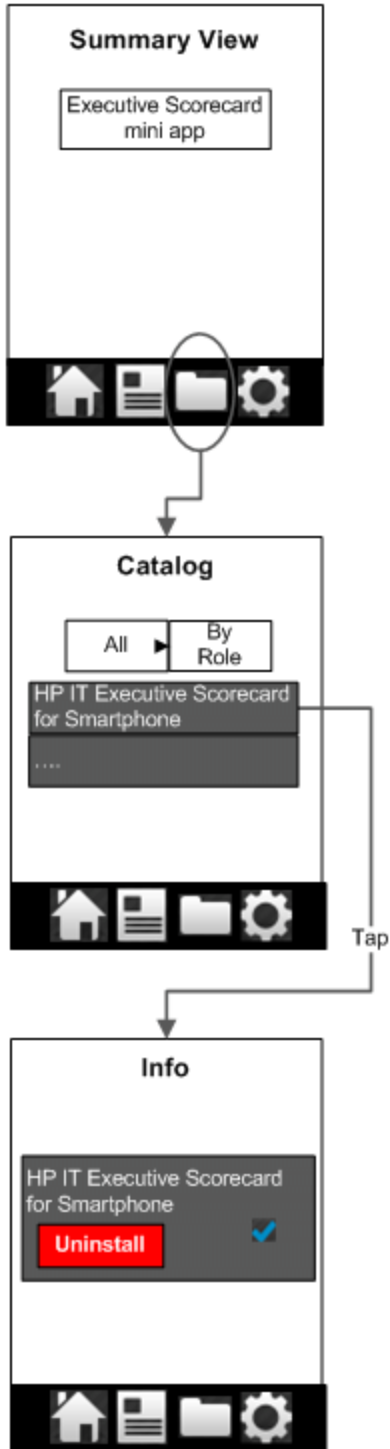
To access other mini apps:

1. Tap the HP Anywhere icon.
2. Enter the user and password.
3. Tap  to view a list of the mini apps installed on your Smartphone. To display all the mini app, tap **All**. To display the mini apps for your role, tap **By Role**.

To uninstall the mini app:

1. Tap the HP Anywhere icon.
2. Enter the user and password.
3. Tap  to uninstall the mini app. For details, see the flowchart in ["Configure the Mini App" \(on page 10\)](#).





## Troubleshooting

This section includes troubleshooting topics.

### **The relevant annotation is not displayed**

**Limitation:** Only the annotations of the current period are displayed.

For example, if an annotation was entered for a specific entity, during the previous period (the previous month if the KPI periodicity is monthly), the annotation is not displayed due to the limitation.

### **Editing or adding an annotation**

**Limitation:** This version does not currently support adding new annotations or editing current annotations. This capability will be supported in subsequent versions.

### **Editing or adding an annotation**

**Limitation:** This version does not currently support adding new annotations or editing current annotations. This capability will be supported in subsequent versions.

