HP Executive Scorecard

For the Windows ® operating system

Software Version: 9.03

Getting Started Guide

Document Release Date: March 2012

Software Release Date: March 2012

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Getting Started with IT Executive Scorecard

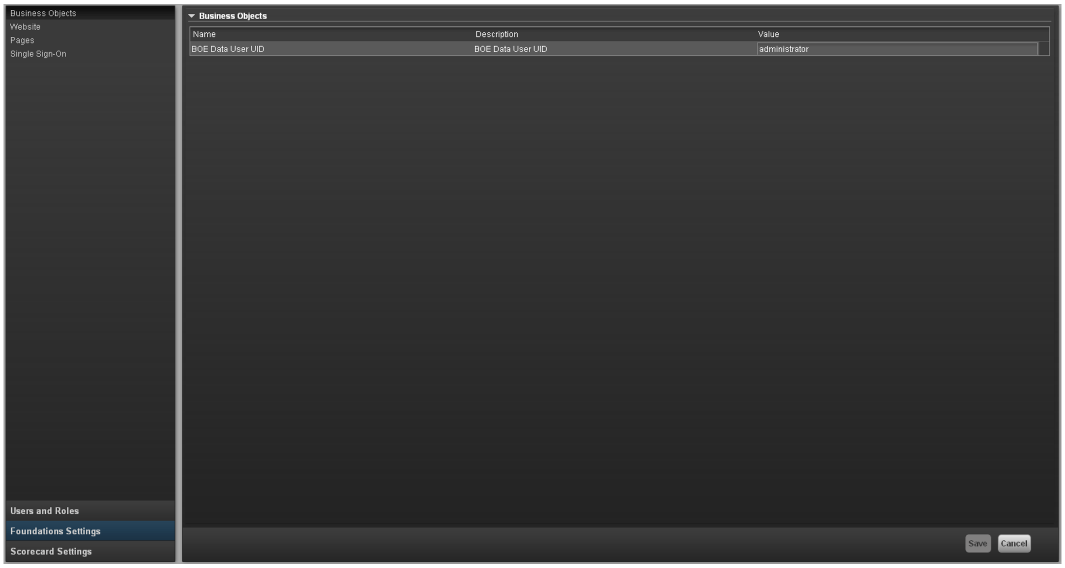
To start working with IT Executive Scorecard you must:

- Read the *Executive Scorecard Release Notes* available on the Installation DVD. The document includes release notes, getting started information, installation and upgrade information, and troubleshooting notes.
- Install Executive Scorecard and run the post-install wizard. For details, see the *IT Executive Scorecard Installation and Configuration Guide* (interactive document) available on the Installation DVD.
- Set up the users, permissions, and other general settings. For details, see "Getting Started" in **General Administration** in the online documentation library or in the *General Admin Guide*.
- Set up the Data Warehouse (integrate the data sources, configure settings, run ETLs, and more). For details, see "Getting Started" in **Data Warehouse Administration** in the online documentation library or in the *Data Warehouse Admin Guide*.
- Review the out-of-the-box Scorecards, Perspectives, Objectives, and KPIs in the Studio, and review the out-of-the-box executive pages in the Dashboard in Executive Scorecard and if necessary modify them or add more information. For details, see "Getting Started" in **Executive Scorecard Administration** in the online documentation library or in the *Executive Scorecard Admin Guide*.
- Review the end-to-end main flows. For details, see "End-to-End Flows" (on page 11).
- Review the customization flows:
  - **BO Universes.** For details, see "Add a Business Context to the Studio" in the *IT Executive Scorecard Admin Guide*.
  - **Objectives, Perspectives, or Scorecards.** For details, see "How to Customize an Active Scorecard, Perspective, or Objective" or "Assign/Unassign a KPI to/from an Objective" in the *IT Executive Scorecard Admin Guide*.
  - **Dashboard Pages.** For details, see "Add a Page to the Dashboard" or "Configure a Page Layout" or "Add Components to a Page" in the *IT Executive Scorecard Admin Guide* .

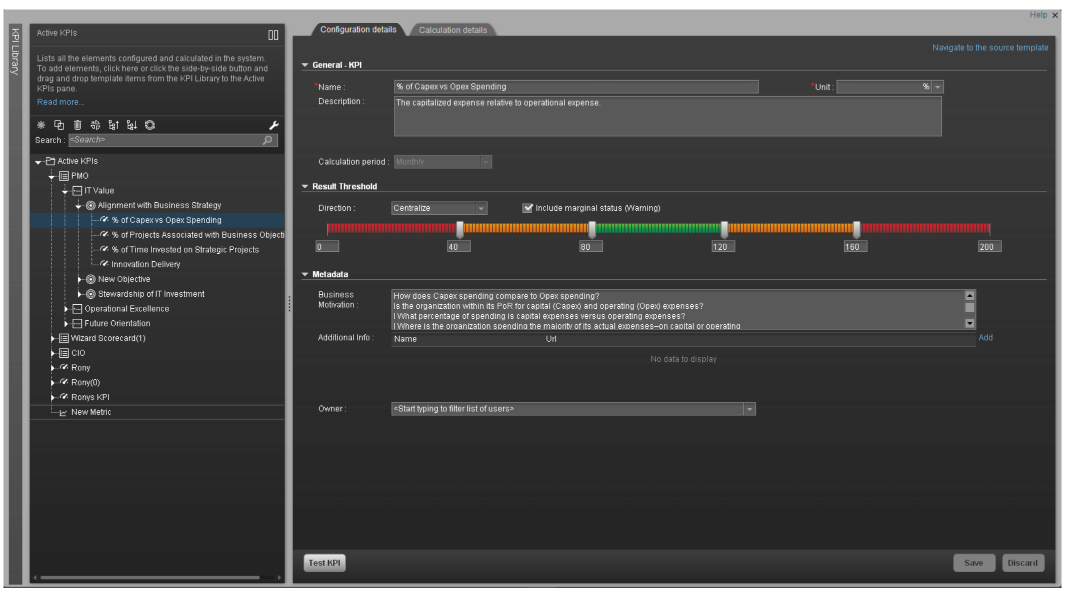
Executive Scorecard Components

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

Admin. The component where the administrator sets the users, permissions, roles, performs the administration and maintenance of Executive Scorecard, Data Warehouse, and Financial Planning and Analysis. For details, see "Getting Started" in *General Admin Guide*.



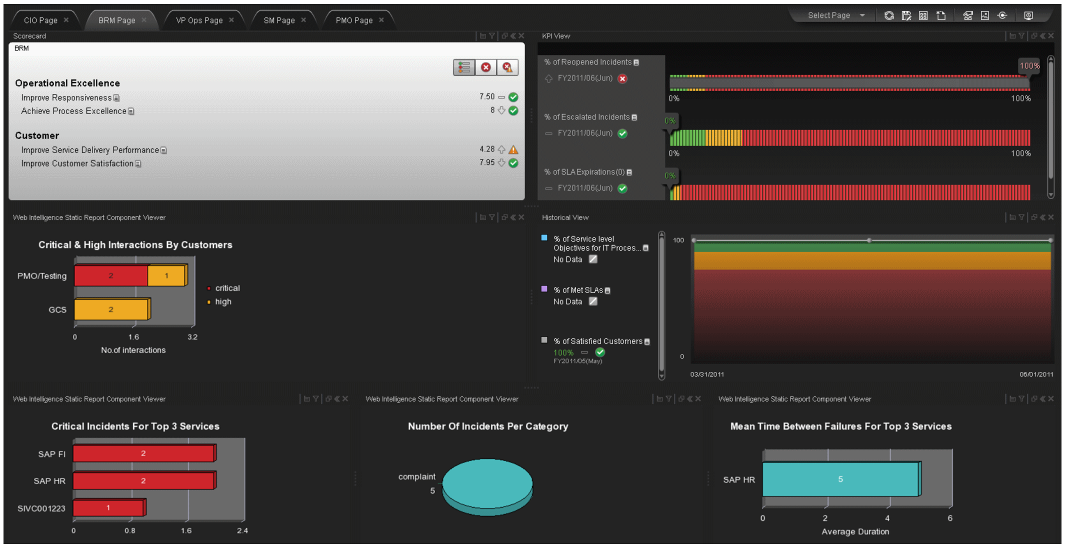
Studio. The component where the Business Analyst can manage Scorecards, Perspectives, Objectives, KPIs, Breakdown KPIs, or Orphan KPIs, change formulas, or filters, thresholds, and more. For concept details about the Studio, see "Learn about the Studio" in *IT Executive Scorecard Admin Guide* . For details about what the Business Analyst can do in the Studio, see "Plan the Executive Dashboard", "Create the Dashboard Contents" or"Enrich the Dashboard Contents" in *IT Executive Scorecard Admin Guide* .



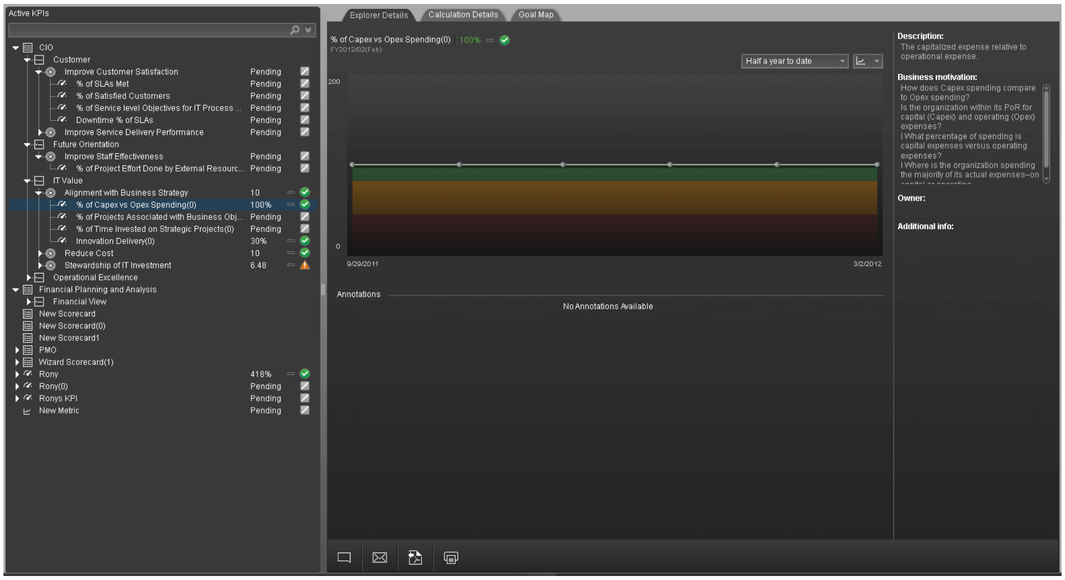
Dashboard. The component where:

- The Business Analyst can create pages and components for the customer. For concept details about the Dashboard, see "Learn About the Executive Dashboard" in *IT Executive Scorecard Admin Guide* . For details about what you can do in the Dashboard, see "Prepare the Dashboard Display" in *IT Executive Scorecard Admin Guide* .

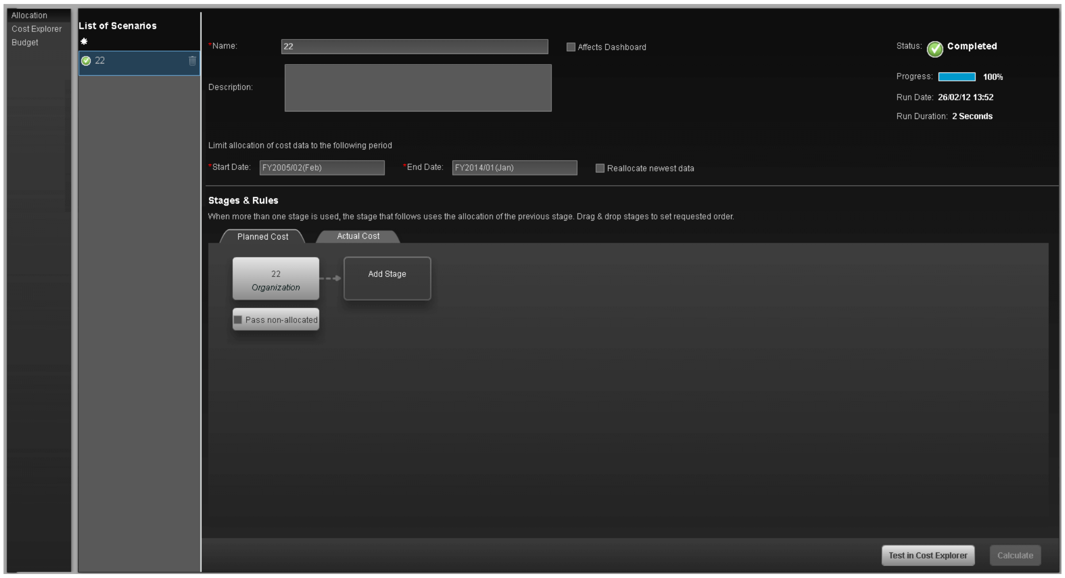
- The Executive can view the pages relevant to the Executive role. For details about what the Executive can view in Dashboard, see "View and Analyze the Business Objectives" in *IT Executive Scorecard Admin Guide* .
- The CIO, IT Financial Manager, IT Financial Analyst, and IT Manager can view Financial Planning and Analysis-related reports. For details, see "View Daily Updates on Actual versus Planned Performance" or "View the Financial Performance of Business Services, Organizations, Customers, and Programs" in *Financial Planning and Analysis User Guide*.



Explorer. The component where the Executive can view overtime information about Objectives, KPIs, Breakdown KPIs, or Orphan KPIs,and configuration information, additional information, or add, edit, and email annotations, and more. For concept details about the Explorer, see "Learn about the Explorer Page" in *IT Executive Scorecard Admin Guide* . For details about what the Executive can view in Explorer, see "View and Analyze the Business Objectives" in *IT Executive Scorecard Admin Guide* .



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



End-to-End Flows

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

This section includes the following flows:

View your Scorecards and KPIs Based on PPM, AM, and SM Data

This section presents the high level end -to-end flow you can follow to view your Scorecards, and KPIs based on data from HP Project and Portfolio Management (PPM), HP Asset Manager (AM) and HP Service Manager (SM) in the HP IT Executive Scorecard Dashboard.

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

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

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

2. **Perform the integration with PPM, AM, and SM Data Sources:**
   a. Select **Admin** > **Data Source Management** then click the **Activate** button for the PPM, AM and SM data source. Fill out the relevant fields and click **Next**.

   b. **Create the Source Data Views.** Open the database client for your PPM, AM and SM database and log in. From the database client, navigate to this directory: **<DWH_home_directory>\DataWarehouse\generated\sql\interface.** Verify that you have administrative access to the remote data sources, or identify the database administrator for each data source who can run SQL scripts for you.On the server that hosts the source data, use the appropriate RDBMS client to execute the script or scripts from **<DWH_home_directory>\DataWarehouse\generated\sq\interface.**

   c. Wait until the activation process is complete.

   For more information, see "Integrate with PPM as a Data Source","Integrate with AM as a Data Source",or"Integrate with SM as a Data Source" in the *Data Warehouse Admin Guide*.

3. **Run the corresponding ETL.**
   a. **Schedule a periodic task.** Open a command line window in the Data Warehouse server, switch to this directory: **<DWH installation directory>\bin**, run this command: **dw_abc_run_steps -register -every nn -streamId Upstream** meaning a task to start dw_abc_run_steps.bat every nn minutes. For more details, see "Schedule Periodic ETL Runs" in the *Data Warehouse Admin Guide*.

   b. **Run the ETL.** Open a command line window in the Data Warehouse server and use the two batch commands:
      - **"dw_abc_load_batch ":** For creating new ETL work-list for loading new data from sources. For details, see "How to Load a Batch Job" in the *Data Warehouse Admin Guide*.
      - **"dw_abc_run_steps ":** For working on the open ETL work-items one by one until completion. For details, see "How to Run Job Steps" in the *Data Warehouse Admin Guide*.

   c. **Schedule the ETL batch to run once or twice a day.**
      i. **Schedule a periodic task.** Open a command line window in the Data Warehouse server, switch to this directory: **<DWH installation directory>\bin**, run this command: **dw_abc_load_batch -streamId Upstream -register -every 10080**. For more details, see "Schedule ETL Run" in the *Data Warehouse Admin Guide*.

      ii. You can then check that the ETL is running as expected using the abc reports. For details, see "Audit Reports".

   d. **Check that the status of the ETL process to see if it has completed.** In the DWH Status page, click the **Select page** arrow and select **DWH Status Page** > **ABC-Op. Status**.For details, see "Check the Status of the ETL Job Steps " in the *Data Warehouse Admin Guide*.

4. **Review in the Studio KPI library, the out-of-the-box Scorecards, Perspectives, Objectives, and the PPM, AM, and SM KPIs.**
   a. Click the **Studio** tab.

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

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

   d. You can now run calculations or historical calculations depending on your needs:
      i. In the Active KPIs pane, select the KPI you have modified. Click the **Calculation options** button in the Active KPIs toolbar, and select the **Recalculate** option. In the Recalculate dialog box that opens, select the relevant context and click **Calculate**. For details, see "How to Perform a Recalculation" in the *IT Executive Scorecard Admin Guide*.

      ii. In the Active KPIs pane, click the **Calculation options** button in the Active KPIs toolbar, and select the **Calculate now** option.In the Calculate Now dialog box that opens, select the relevant context and click **Calculate**. For details, see "How to Perform a Calculation After Configuration Change" in the *IT Executive Scorecard Admin Guide*.

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

View your Scorecards and KPIs Based on BSM, UCMDB, and ALM Data

This section presents the high level end -to-end flow you can follow to view your Scorecards, and KPIs based on HP Business Service Management (BSM), HP Universal Configuration Management Database (UCMDB) and HP Application Lifecycle Management ALM) in the HP IT Executive Scorecard Dashboard.

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

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

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

2. **Perform the integration with BSM, UCMDB, and ALM Data Sources:**
   a. Select **Admin** > **Data Source Management** then click the **Activate** button for the BSM, UCMDB, and ALM data source. Fill out the relevant fields and click **Next**.

   b. Wait until the activation process is complete.

   For more information, see "Integrate with BSM as a Data Source","Integrate with UCMDB as a Data Source",or"Integrate the ALM Data Source" in the *Data Warehouse Admin Guide*.

3. **Run the corresponding ETL.**
   a. **Schedule a periodic task.** Open a command line window in the Data Warehouse server, switch to this directory: **<DWH installation directory>\bin**, run this command: **dw_abc_run_steps -register -every nn -streamId Upstream** meaning a task to start dw_abc_run_steps.bat every nn minutes. For more details, see "Schedule Periodic ETL Runs" in the *Data Warehouse Admin Guide*.

   b. **Run the ETL.** Open a command line window in the Data Warehouse server and use the two batch commands:
      i. **"dw_abc_load_batch ":** For creating new ETL work-list for loading new data from sources. For details, see "How to Load a Batch Job" in the *Data Warehouse Admin Guide*.

      ii. **"dw_abc_run_steps ":** For working on the open ETL work-items one by one until completion. For details, see "How to Run Job Steps" in the *Data Warehouse Admin Guide*.

   c. **Schedule the ETL batch to run once or twice a day.**
      i. **Schedule a periodic task.** Open a command line window in the Data Warehouse server, switch to this directory: **<DWH installation directory>\bin**, run this command: **dw_abc_load_batch -streamId Upstream -register -every 10080**. For more details, see "Schedule ETL Run" in the *Data Warehouse Admin Guide*.

ii. You can then check that the ETL is running as expected using the abc reports. For details, see "Audit Reports".

d. **Check that the status of the ETL process to see if it has completed.** In the DWH Status page, click the **Select page** arrow and select **DWH Status Page** > **ABC-Op. Status**.For details, see "Check the Status of the ETL Job Steps " in the *Data Warehouse Admin Guide*.

4. **Review in the Studio KPI library, the out-of-the-box Scorecards, Perspectives, Objectives, and the BSM, UCMDB, and ALM KPIs.**
   a. Click the **Studio** tab.

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

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

   d. You can now run calculations or historical calculations depending on your needs:
      i. In the Active KPIs pane, select the KPI you have modified. Click the **Calculation options** button in the Active KPIs toolbar, and select the **Recalculate** option. In the Recalculate dialog box that opens, select the relevant context and click **Calculate**. For details, see "How to Perform a Recalculation" in the *IT Executive Scorecard Admin Guide*.

      ii. In the Active KPIs pane, click the **Calculation options** button in the Active KPIs toolbar, and select the **Calculate now** option.In the Calculate Now dialog box that opens, select the relevant context and click **Calculate**. For details, see "How to Perform a Calculation After Configuration Change" in the *IT Executive Scorecard Admin Guide*.

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

View your Scorecards and KPIs Based on NA Data

This section presents the high level end -to-end flow you can follow to view your Scorecards, and KPIs based on HP Network Automation (NA) data in the HP IT Executive Scorecard Dashboard.

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

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

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

2. **Activate the integration with the HP Network Automation Data Source.** For details, see "Integrate the NA Data Source" in the ***Data Warehouse Admin Guide***.

3. **Run the corresponding ETL.**
   a. **Schedule a periodic task.** Open a command line window in the Data Warehouse server, switch to this directory: **<DWH installation directory>\bin**, run this command: **dw_abc_run_steps -register -every nn -streamId Upstream** meaning a task to start dw_abc_run_steps.bat every nn minutes. For more details, see "Schedule Periodic ETL Runs" in the *Data Warehouse Admin Guide*.

   b. **Run the ETL.** Open a command line window in the Data Warehouse server and use the two batch commands:
      i. **"dw_abc_load_batch ":** For creating new ETL work-list for loading new data from sources. For details, see "How to Load a Batch Job" in the *Data Warehouse Admin Guide*.

      ii. **"dw_abc_run_steps ":** For working on the open ETL work-items one by one until completion. For details, see "How to Run Job Steps" in the *Data Warehouse Admin Guide*.

   c. **Schedule the ETL batch to run once or twice a day.**
      i. **Schedule a periodic task.** Open a command line window in the Data Warehouse server, switch to this directory: **<DWH installation directory>\bin**, run this command: **dw_abc_load_batch -streamId Upstream -register -every 10080**. For more details, see "Schedule ETL Run" in the *Data Warehouse Admin Guide*.

      ii. You can then check that the ETL is running as expected using the abc reports. For details, see "Audit Reports".

   d. **Check that the status of the ETL process to see if it has completed.** In the DWH Status page, click the **Select page** arrow and select **DWH Status Page** > **ABC-Op. Status**.For details, see "Check the Status of the ETL Job Steps " in the *Data Warehouse Admin Guide*.

4. **Review in the Studio KPI library, the out-of-the-box Scorecards, Perspectives, Objectives, and the HP Network Automation KPIs.**

a. Click the **Studio** tab.

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

c. Select the relevant Scorecards, Perspectives, Objectives, and the HP Business Service Management, HP Universal Configuration Management Database and HP Application Lifecycle Management KPIs of interest to your organization and drag them from the KPI Library (templates) to the Active KPIs Pane to activate them.

d. You can now run calculations or historical calculations depending on your needs:

   i. In the Active KPIs pane, select the KPI you have modified. Click the **Calculation options** button in the Active KPIs toolbar, and select the **Recalculate** option. In the Recalculate dialog box that opens, select the relevant context and click **Calculate**. For details, see "How to Perform a Recalculation" in the *IT Executive Scorecard Admin Guide*.

   ii. In the Active KPIs pane, click the **Calculation options** button in the Active KPIs toolbar, and select the **Calculate now** option.In the Calculate Now dialog box that opens, select the relevant context and click **Calculate**. For details, see "How to Perform a Calculation After Configuration Change" in the *IT Executive Scorecard Admin Guide*.

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

View your Scorecards and KPIs Based on NNM, BSM (APM), and DP Data

This section presents the high level end -to-end flow you can follow to view your Scorecards, and KPIs based on HP Network Node Manager (NNM), HP Business Service Management (Application Performance Management (BSM-APM)) and HP Data Protector (DP) in the HP IT Executive Scorecard Dashboard.

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

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

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

2. **Activate the integration with the NNM, BSM-APM, and DP Data Sources.** For details, see "Integrate the NNM Data Source","Integrate with BSM as a Data Source",or "Integrate the DP Data Source" in the ***Data Warehouse Admin Guide***.

3. **Run the corresponding ETL.**
   a. **Schedule a periodic task.** Open a command line window in the Data Warehouse server, switch to this directory: **<DWH installation directory>\bin**, run this command: **dw_abc_run_steps -register -every nn -streamId Upstream** meaning a task to start dw_abc_run_steps.bat every nn minutes. For more details, see "Schedule Periodic ETL Runs" in the *Data Warehouse Admin Guide*.

   b. **Run the ETL.** Open a command line window in the Data Warehouse server and use the two batch commands:
      i. **"dw_abc_load_batch ":** For creating new ETL work-list for loading new data from sources. For details, see "How to Load a Batch Job" in the *Data Warehouse Admin Guide*.

      ii. **"dw_abc_run_steps ":** For working on the open ETL work-items one by one until completion. For details, see "How to Run Job Steps" in the *Data Warehouse Admin Guide*.

   c. **Schedule the ETL batch to run once or twice a day.**
      i. **Schedule a periodic task.** Open a command line window in the Data Warehouse server, switch to this directory: **<DWH installation directory>\bin**, run this command: **dw_abc_load_batch -streamId Upstream -register -every 10080**. For more details, see "Schedule ETL Run" in the *Data Warehouse Admin Guide*.

      ii. You can then check that the ETL is running as expected using the abc reports. For details, see "Audit Reports".

   d. **Check that the status of the ETL process to see if it has completed.** In the DWH Status page, click the **Select page** arrow and select **DWH Status Page** > **ABC-Op.**

Status.For details, see "Check the Status of the ETL Job Steps " in the *Data Warehouse Admin Guide*.

4. **Review in the Studio KPI library, the out-of-the-box Scorecards, Perspectives, Objectives, and the NNM, BSM-APM, and DP KPIs.**
   a. Click the **Studio** tab.

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

   c. Select the relevant Scorecards, Perspectives, Objectives, and the NNM, BSM-APM, and DP KPIs of interest to your organization and drag them from the KPI Library (templates) to the Active KPIs Pane to activate them.

   d. You can now run calculations or historical calculations depending on your needs:
      i. In the Active KPIs pane, select the KPI you have modified. Click the **Calculation options** button in the Active KPIs toolbar, and select the **Recalculate** option. In the Recalculate dialog box that opens, select the relevant context and click **Calculate**. For details, see "How to Perform a Recalculation" in the *IT Executive Scorecard Admin Guide*.

      ii. In the Active KPIs pane, click the **Calculation options** button in the Active KPIs toolbar, and select the **Calculate now** option.In the Calculate Now dialog box that opens, select the relevant context and click **Calculate**. For details, see "How to Perform a Calculation After Configuration Change" in the *IT Executive Scorecard Admin Guide*.

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

View your Scorecards and KPIs Based on Alternate Source Data

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

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

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

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

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

2. **Perform the integration with an alternate data source:**
   a. Take the sample files from **< Installation Directory>\agora\Content Packs\ETL\flatfiles\demodata**, create your own according to the rules and save them in the External sources directory (in C:\EXTERNAL).

   b. To activate the ALT content pack, go through the automation backend tool. For details, see "The Automation Tool" in the *Data Warehouse Admin Guide*.

   c. Wait until the activation process is complete.

   For more information, see "Integrate Alternate Sources" in the *Data Warehouse Admin Guide*.

3. **Run the corresponding ETL.**
   a. **Schedule a periodic task.** Open a command line window in the Data Warehouse server, switch to this directory: **<DWH installation directory>\bin**, run this command: **dw_abc_run_steps -register -every nn -streamId Upstream** meaning a task to start dw_abc_run_steps.bat every nn minutes. For more details, see "Schedule Periodic ETL Runs" in the *Data Warehouse Admin Guide*.

   b. **Run the ETL.** Open a command line window in the Data Warehouse server and use the two batch commands:
      i. **"dw_abc_load_batch ":** For creating new ETL work-list for loading new data from sources. For details, see "How to Load a Batch Job" in the *Data Warehouse Admin Guide*.

      ii. **"dw_abc_run_steps ":** For working on the open ETL work-items one by one until completion. For details, see "How to Run Job Steps" in the *Data Warehouse Admin Guide*.

   c. **Schedule the ETL batch to run once or twice a day.**
      i. **Schedule a periodic task.** Open a command line window in the Data Warehouse server, switch to this directory: **<DWH installation directory>\bin**, run this

command: **dw_abc_load_batch -streamId Upstream -register -every 10080**. For more details, see "Schedule ETL Run" in the *Data Warehouse Admin Guide*.

ii. You can then check that the ETL is running as expected using the abc reports. For details, see "Audit Reports".

d. **Check that the status of the ETL process to see if it has completed.** In the DWH Status page, click the **Select page** arrow and select **DWH Status Page** > **ABC-Op. Status**.For details, see "Check the Status of the ETL Job Steps " in the *Data Warehouse Admin Guide*.

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

a. Click the **Studio** tab.

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

c. Select the relevant Scorecards, Perspectives, Objectives, and the HP Business Service Management, HP Universal Configuration Management Database and HP Application Lifecycle Management KPIs of interest to your organization and drag them from the KPI Library (templates) to the Active KPIs Pane to activate them.

d. You can now run calculations or historical calculations depending on your needs:

i. In the Active KPIs pane, select the KPI you have modified. Click the **Calculation options** button in the Active KPIs toolbar, and select the **Recalculate** option. In the Recalculate dialog box that opens, select the relevant context and click **Calculate**. For details, see "How to Perform a Recalculation" in the *IT Executive Scorecard Admin Guide*.

ii. In the Active KPIs pane, click the **Calculation options** button in the Active KPIs toolbar, and select the **Calculate now** option.In the Calculate Now dialog box that opens, select the relevant context and click **Calculate**. For details, see "How to Perform a Calculation After Configuration Change" in the *IT Executive Scorecard Admin Guide*.

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

Customization

This section includes the following topics:

Customize KPIs

Executive Scorecard enables you to customize KPIs as follows:

You can:

- Activate KPIs by dragging KPI templates from the KPIs Library pane to the Active KPIs pane in the Studio. For details, see "How to Create and Activate KPIs Using Templates" (on page 1) in the *IT Executive Scorecard Admin Guide*.
- Create KPIs by cloning existing active KPIs. For details, see "How to Create and Activate a New KPI by Cloning an Existing KPI" in the *IT Executive Scorecard Admin Guide*.
- Customize a formula or filter. For details, see "Modify a KPI or Metric Formula or Filter" in the *IT Executive Scorecard Admin Guide*.
- Customize a KPI's Business Context. For details, see "Modify a KPI or Metric Business Context" in the *IT Executive Scorecard Admin Guide*.
- You can enrich the Dashboard contents with Breakdown KPIs, overrides, Cascading Scorecards, and more. For details, see "Enrich the Executive Dashboard Contents" in the *IT Executive Scorecard Admin Guide*.
- You can create and manage Breakdowns for a KPI according to the KPI dimensions. For details, see "Create and Manage Breakdown KPIs or Metrics" in the *IT Executive Scorecard Admin Guide*.

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