HP IT Executive Scorecard

For the Windows ® operating system

Software Version: 9.30

Getting Started Guide

Document Release Date: May 2012

Software Release Date: May 2012

Legal Notices

Warranty

The only warranties for HP products and services are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. HP shall not be liable for technical or editorial errors or omissions contained herein.

The information contained herein is subject to change without notice.

Restricted Rights Legend

Confidential computer software. Valid license from HP required for possession, use or copying. Consistent with FAR 12.211 and 12.212, Commercial Computer Software, Computer Software Documentation, and Technical Data for Commercial Items are licensed to the U.S. Government under vendor's standard commercial license.

Copyright Notice

Trademark Notices

• Adobe® and Acrobat® are trademarks of Adobe Systems Incorporated.

• AMD and the AMD Arrow symbol are trademarks of Advanced Micro Devices, Inc.

• Google™ and Google Maps™ are trademarks of Google Inc.

• Intel®, Itanium®, Pentium®, and Intel® Xeon® are trademarks of Intel Corporation in the U.S. and other countries.

• Java is a registered trademark of Oracle and/or its affiliates.

• Microsoft®, Windows®, Windows NT®, Windows® XP, Windows Vista® and SQL Server® are U.S. registered trademarks of Microsoft Corporation.

• Oracle is a registered trademark of Oracle Corporation and/or its affiliates.

Documentation Updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
- Software Release Date, which indicates the release date of this version of the software.

To check for recent updates or to verify that you are using the most recent edition of a document, go to:

http://h20230.www2.hp.com/selfsolve/manuals

This site requires that you register for an HP Passport and sign in. To register for an HP Passport ID, go to:

http://h20229.www2.hp.com/passport-registration.html

Or click the **New users - please register** link on the HP Passport login page.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HP sales representative for details.

Support

Visit the HP Software Support Online web site at:

http://www.hp.com/go/hpsoftwaresupport

This web site provides contact information and details about the products, services, and support that HP Software offers.

HP Software online support provides customer self-solve capabilities. It provides a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the support web site to:

- Search for knowledge documents of interest
- Submit and track support cases and enhancement requests
- Download software patches
- Manage support contracts
- Look up HP support contacts
- Review information about available services
- Enter into discussions with other software customers
- Research and register for software training

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract. To register for an HP Passport ID, go to:

http://h20229.www2.hp.com/passport-registration.html

To find more information about access levels, go to:

http://h20230.www2.hp.com/new_access_levels.jsp

Disclaimer for PDF Version of Online Help

This document is a PDF version of the online help. This PDF file is provided so you can easily print multiple topics from the help information or read the online help in PDF format.

Note: Some topics do not convert properly to PDF, causing format problems. Some elements of online help are completely removed from the PDF version. Those problem topics can be successfully printed from within the online help.

Contents

Getting Started with IT Executive Scorecard

This section contains basic steps that you can take to begin working with IT Executive Scorecard.

Prerequisites

- Read the *IT Executive Scorecard Release Notes* available on the Installation DVD. The document includes release notes, installation and upgrade information, and troubleshooting notes.
- Read the *IT Executive Scorecard Support Matrix* available on the Installation DVD. The document includes release notes, 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, general settings, Data Warehouse settings, run ETLs, and more. For details, see "Getting Started with General Admin" in the *Administrator Guide*.

Populate Executive Scorecard using Content Acceleration Packs

Content Acceleration Packs are ready-to-import packages that include one Scorecard, several KPIs, a Dashboard page that displays data in the Scorecard component and its KPI components, a Context (universe), and more.You can then use Content Acceleration Packs as the base for further configuration of KPIs, contexts, Dashboard pages or more, or you can remove the Content Acceleration Packs. For details, see "Import Content Acceleration Packs" on page 13 in the *Getting Started with IT Executive Scorecard*.

Upload data into Executive Scorecard using .CSV files

You can simply and easily upload data into the Executive Scorecard Studio using .CSV files without intergrating with external sources or other HP products. The Studio can then be used to integrate with third party data sources, testing, or for Proof of Concept (POC) sessions. For details, see "Create and Manage Contexts Using Context Designer" in the *Administrator Guide*.

Populate Executive Scorecard and upload data using integrations with supported data sources

To view dynamic data in the Dashboard pages and reports, you must integrate with supported data sources. For details, see "Getting Started with the Content Reference Guide"in the *Content Reference Guide*.

If you installed one of the data sources that have out-of-the-box support, you can use the data-source management integration. For details, see "Integrate the Data Sources"in the *Content Reference Guide*.

For details about the integrations, review the end-to-end flows. For details, see "End-to-End Flows" on page 22.

Create and customize contexts (universes)

View the out-of-the-box universes created by integrations with supported data sources. For details, see "Reference: Universes" in the *Content Reference Guide*.

You can also create your own context (universe) using the existing database tables, and tables created by importing .CSV files, and creating relationships between these tables. You can select the entities you want to use to create KPIs in the Studio, and then use these KPIs to build the relevant Dashboard pages. For details, see "Create and Manage Contexts Using Context Designer" in the *Administrator Guide*.

Combine data and contexts from all methods

You can combine contexts from the Content Acceleration Packs, from tables created using .CSV files, and tables created by integrating with supported data sources.

You can combine data obtained from the integration with supported data sources and from tables imported using .CSV files.

Review and customize the contents of the Studio and Dashboard pages

For details on working the the Studio and Dashboard,see "Getting Started with Business Analysis" in the *Business Analyst Guide*.

Review Scorecards, Perspectives, Objectives, and KPIs in the Studio. You can customize these items. For details, see "Configure a Scorecard", "Configure a Perspective", "Configure an Objective", or "Assign/Unassign KPIs to/from Objectives" in the *Business Analyst Guide*.

If you have installed a Content Acceleration Pack, you can review the Executive page in the Dashboard. You can also create your Dashboard pages by populating them with the relevant components. For details, see "Add a Page to the Dashboard" or "Configure a Page Layout". Or add components as described in "Prepare the Dashboard Display" in the *Business Analyst Guide*.

Work with FPA: Financial Planning and Analysis

With the Financial Planning and Analysis module, you can view financial data from the Asset Manager, Project and Portfolio Management data sources in the Finance tab. You can create allocation scenario for planned costs and actual costs, perform a multi-dimensional cost analysis, finalize the budget for your organization, and view the financial performance of your organization in Dashboard pages and reports. For details, see "Getting Started with Financial Planning and Analysis" in the online help or in *Financial Analyst Guide*.

Localize and globalize XS: Executive Scorecard

The user interface of HP Executive Scorecard supports multiple languages. For details, see "Localize and Globalize Executive Scorecard" in the *Administrator Guide*.

View the Executive Scorecard on a Tablet or a Mobile

For details, see "HP IT Executive Scorecard on a Tablet (XS for Tablet Mini App) Overview" in the *Getting Started with XS for Tablet* or "HP IT Executive Scorecard on a Smartphone (XS for Smartphone Mini App) Overview" in the *Getting Started with XS for Mobile*.

Extend your content (Advanced users)

- **Develop content and model DWH schema using IDE**

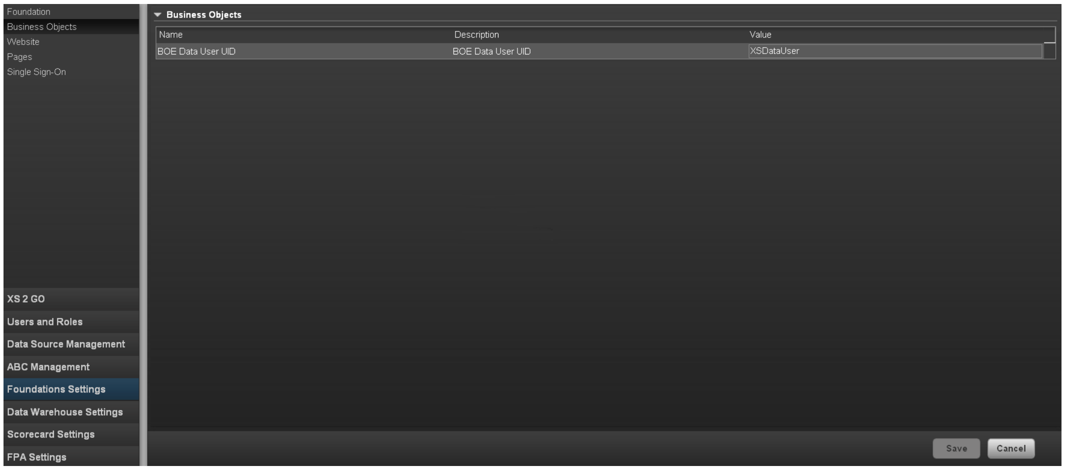
The Integrated Development Environment (IDE) allows you to develop content. For details, see "Develop New Content Using the Integrated Development Environment" in the *Content Extension Guide*.

Other capabilities are detailed in the *Content Extension Guide* available from the Executive Scorecard 9.30 in the HP Software Product Manual Site (**http://h20230.www2.hp.com/selfsolve/manuals**).

Executive Scorecard Components

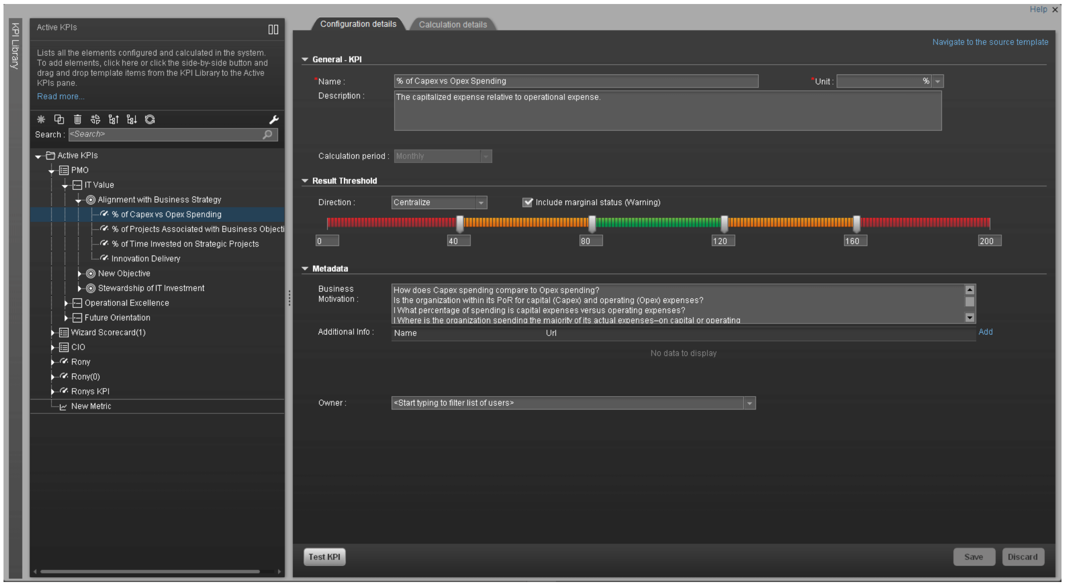
HP IT Executive Scorecard and Financial Planning and Analysis include the following user interface components:

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



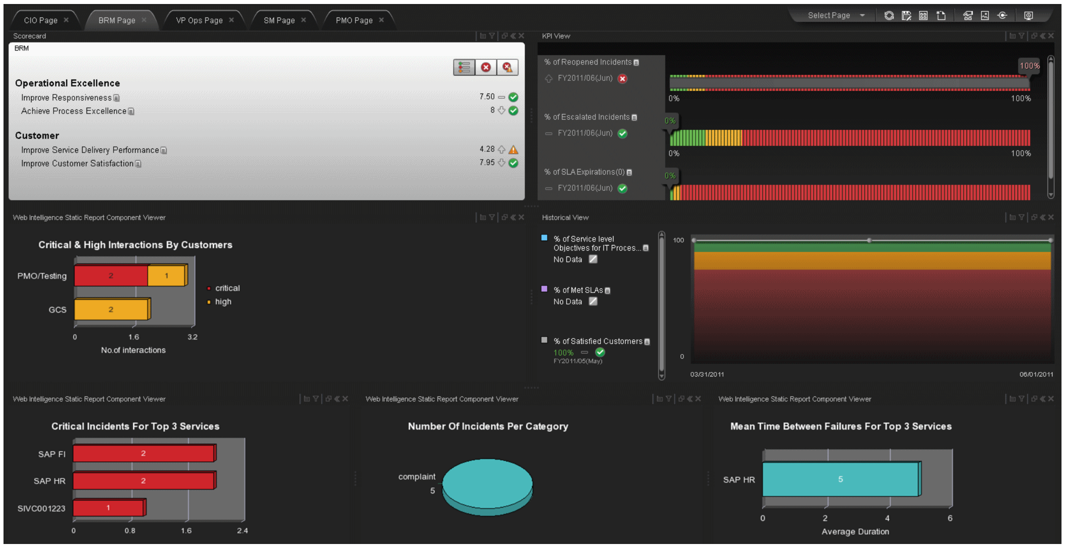
Studio. The component where the Business Analyst can:

- Manage Scorecards, Perspectives, Objectives, Metrics, Metric Breakdowns, KPIs, KPI Breakdowns, or Orphan KPIs
- Change formulas or filter thresholds, and more. For concept details about the Studio, see "Learn About the Executive Scorecard Components" in the*Business Analyst Guide* . For details about what the Business Analyst can do in the Studio, see "Plan the Executive Dashboard", "Create the Executive Dashboard Contents" or "Enrich the Dashboard Contents" in the*Business Analyst Guide* .



Dashboard. The component where:

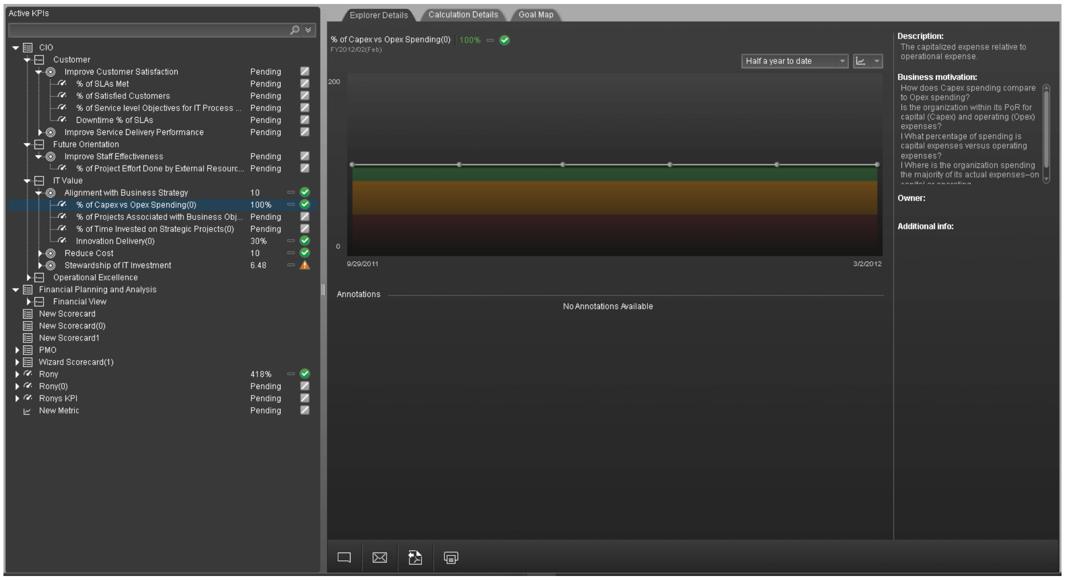
- The Business Analyst can create pages and components for the customer. For concept details about the Dashboard, see "Learn About the Executive Dashboard" in the *Business Analyst Guide*. For details about what you can do in the Dashboard, see "Prepare the Dashboard Display" in the *Business Analyst 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 the *Business Analyst Guide*.
- The CIO, IT Financial Manager, IT Financial Analyst, and IT Manager can view Financial Planning and Analysis-related reports. For details, see "View the Financial Perfomance of Your Organization" in the *Financial Analyst Guide*.



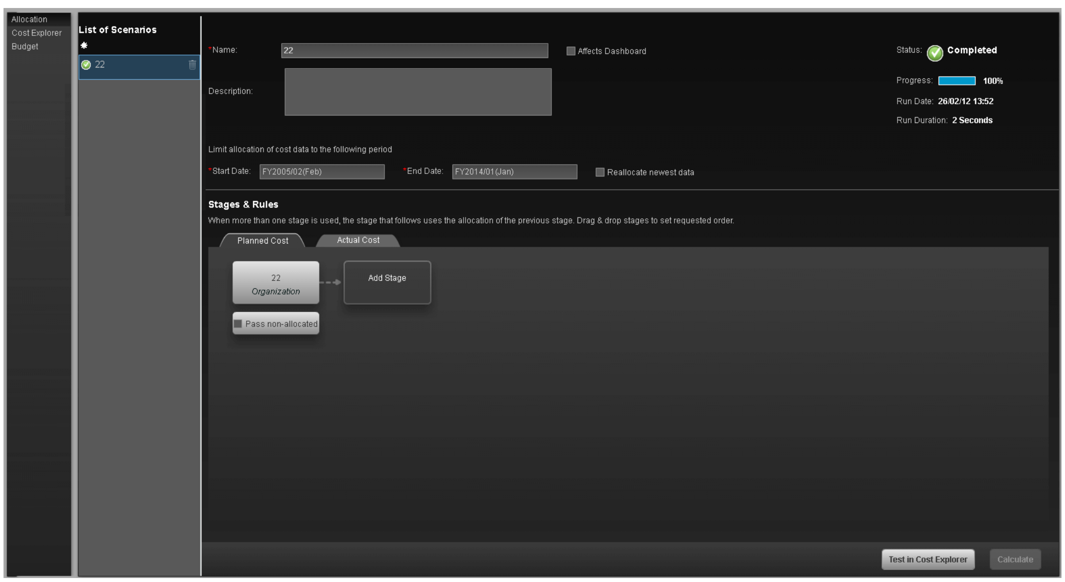
Explorer. The component where the Executive can:

- View overtime information about Scorecards, Perspectives, Objectives, KPIs, KPI Breakdowns, Metrics, Metric Breakdowns, or Orphan KPIs.
- View configuration and additional information.
- Add, edit, and email annotations.

For concept details about the Explorer, see "View and Analyze Results in the Explorer Page" in the *Business Analyst Guide*. For details about what the Executive can view in Explorer, see "View and Analyze the Business Objectives" in the *Business Analyst 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 Analyst Guide*.



Content Acceleration Packs

Content Acceleration Packs describe typical stories that show how correct implementation of Executive Scorecard drives Performance Improvement and Cost Reduction for the IT organization. Content Packs demonstrate Executive Scorecard capabilities, and to help you add basic elements that can be used to customize your Dashboard.

A Content Acceleration Pack includes one Scorecard, several KPIs, a Dashboard page, a Context (universe), and .CVS files.

This section includes the following topics:

Import Content Acceleration Packs

Content Acceleration Packs are ready-to-import packages that include Scorecards, KPIs, a Dashboard page that displays the Scorecards and KPI components, a Context (universe), and .CSV files.

To access Content Acceleration Packs:

Go to **<installation_directory>\config\cap\import\load**.

Learn More

Content Acceleration Packs Contents

The Content Acceleration Pack ZIP file includes the following folders:

- **data** - contains the .CSV files. The name of the .CSV files to be uploaded provide data for the Content Acceleration Pack KPIs. For details, see "Upload the data into the Studio" on page 16.
- **kpi** - contains the .XML files that correspond to KPIs and Scorecards. The KPIs and Scorecards are imported into the Studio Active KPIs pane. The Scorecards and relevant KPIs are also displayed in the Dashboard pages after the calculation completes and the relevant page is loaded. For details, see "Import the Content Acceleration Pack" on next page.
- **uim**- contains:
  - **Components** folder - contains the .XML files that correspond to the components that you can add to a page.
  - **Events** folder - contains the .XML files that correspond to the events that you can add to a page.
  - **Pages** folder - contains the .XML files that correspond to the demo pages.

You import the components, events, and page are into the Dashboard where they are used to build the Dashboard page. For details, see "Import Content Acceleration Packs" on previous page.

- **universe** folder- contains the .XML files that correspond to the universes. The Content Acceleration Pack installation automatically installs the universes.
- **manifest.properties** file - includes information about the following items:

`ID`	The Content Acceleration Pack ID number
`universe`	The names of the universes to be calculated (comma separated). For example, Period_Universe.
`recalculate.date`	The start date of the recalculation. You perform a recalculation after you have imported the Content Acceleration Pack. The recalculation builds a history of the data. The historical data is used in the Content Acceleration Pack Dashboard page to display over time information. The date format is: DD/MM/YYYY.
`bo.in.use`	• false - if SAP BusinessObjects Enterprise is not going to be used. • true - if SAP BusinessObjects Enterprise is also going to be used.
`version`	The version of the Content Acceleration Pack.
`type`	For internal use.

Tasks

This section includes:

- "Install a Content Acceleration Pack" below
- "Use the Scorecard, KPIs, Dashboard Page, and Explorer" on page 16
- "Uninstall an Content Acceleration Pack" on page 16

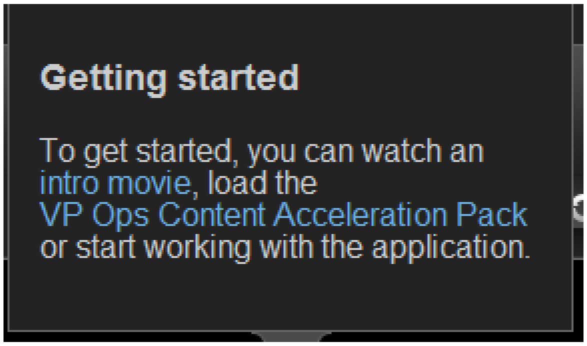
Install a Content Acceleration Pack

1. **Import the Content Acceleration Pack**

   You can install Content Acceleration packs using one of the methods listed below:

   - **Using the UI:**

     In the Executive Scorecard application, click  on the left of the top toolbar of the application. The Getting Started menu opens:



Click **intro movie** to display a movie that describes how to use the Content Acceleration Packs.

Click VP Ops Content Acceleration Pack to install the VP Ops Content Acceleration Pack.

- **Using JMX:**

  The installation process of Executive Scorecard automatically uploads the Content Acceleration Pack from the **<installation_directory>\config\demopacks\import\load** folder.

  i. Make sure you have JDK installed.

  ii. Run **jconsole** in the **<XS_server>\agora\jdk\bin**.

  iii. In the window that opens, select the **Remote Process** option, enter **<host_name>:<port_number>** and click **Connect**.

  iv. After the application completes loading, click the **MBeans** tab.

  v. Click **com.hp.btoe.studio.jmx**.

  vi. Expand **loadDemoPack**, select the **Operations** branch, and click **loadContentAccelerationPack**. In the Operation invocation area, click the **loadContentAccelerationPack** button.

  - If the import operation is successful, the message **Method successfully invoked** is returned.

  - In addition, the XML file is moved to the **<XS_server>\agora\glassfish\glassfish\domains\BTOA\config\cap\import\loaded** folder.

  - If the import operation fails, an explanation of the failure is added in the relevant file in the **<XS_server>\agora\glassfish\glassfish\domains\BTOA\config\cap\import\errors** folder.

  For more details, see "Import or Export Trees and KPIs".

> **Note:** The Context (universe) is automatically imported when you import the Content Acceleration Pack. Relevant information is automatically added, with a **BO** prefix, to the relevant tables in the Management Schema.

2. **Upload the data into the Studio**

    a. In Executive Scorecard, click the **Admin** tab.

    b. Click **Context Management**.

    c. Click **Add Table**. The **Repository** area opens.

    d. Click **Add** to open the data loader wizard. Follow the steps to upload the .CSV file. For details, see "Import Content Acceleration Packs" on page 13.

    e. Click the **Upload data file** button.

    The file is uploaded. The upload operation saves the changes you made to the .CSV file. The new table appears in the External Tables area.

Use the Scorecard, KPIs, Dashboard Page, and Explorer

You can now:

- View and expand the Scorecard tree in the Active KPIs pane. For details, see "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" in the *Business Analyst Guide*.
- View the Scorecard, and KPIs configuration in the Configuration Details, and Calculation Details tabs. For details, see "Configure a Scorecard" or "Configure a KPI or a Metric" in the *Business Analyst Guide*.
- View the Content Acceleration Pack page in Dashboard. For details, see "Manage Pages"in the *Business Analyst Guide*.
- View information in Explorer. For details, see "View and Analyze Results in the Explorer Page"in the *Business Analyst Guide*.

Uninstall an Content Acceleration Pack

To uninstall the Content Acceleration Pack:

1. In the Active KPIs pane, remove the Scorecard and its KPIs.
2. In Dashboard, remove the Content Acceleration Pack page.
3. In the Context Designer, remove the Content Acceleration Pack Context (universe).

Content Acceleration Pack Use Case: 360 Degree Service View

Michael is the VP of Operations for the IT organization of a worldwide enterprise called ILD. ILD is a global manufacturer of heavy machinery and has over 20 sites in 4 continents. ILD has 48,000 employees around the globe who work in a collaborative way and consume IT services from a central IT organization. Michael manages a budget of 50M$ which represents 75% of the total IT budget. He serves a dozen lines of business. Michael must keep his organization agile and lean so he will be in the right position to provide the adequate IT solutions for the business challenges of the enterprise.

VP of Operations Main Objectives

Michael's main objectives are:

- Creating the enterprise infrastructure and operations strategy and aligning it to the business.
- Delivering IT services to the lines of business, end users, and customers at the required cost, service level, and speed.
- Optimizing infrastructure and operations to improve productivity, efficiency, service quality, and agility.
- Negotiating and managing all external contracts related to hardware, software, and co-location facilities.

The Organization Main IT Services

The main IT services of the organization are:

- **ILD.com** – The enterprise public website that should be available 24x7.
- **CRM** – Customer Relationship Management Service provided by an off-premise vendor - Salecforce.com.
- **ERP** – Enterprise Resource Planning Service provided in an on-premise mode by SAP.
- **Mail** – An on-premise Microsoft Exchange service.

Implementing the Objectives

To better meet his objectives Michael decides to adopt a performance measurement system. It will be used to track his organization's performance and identify improvement opportunities. Michael decides to deploy IT Executive Scorecard as a "single pane of glass". He is specifically interested in having a 360 service view that will provide him with an overall status of the services under his responsibility.

The 360 view includes 3 main aspects: People, Process and Technology:

People	Process	Technology
Employee	Best Practices	Systems
Partners\Vendors	Enterprise	Information
Contractor	Internal Organization	Infrastructure
User	Regulation	Applications
		Security

Michael and his staff identify a set of Key Performance Indicators that will be used to measure and track the IT Operations performance. They also set a weekly internal staff meeting in which they will review the KPIs statuses and derive actions based on the measurements they put in place. Since the business requirements are dynamic they set forth a quarterly review meeting of the KPIs and Objectives in order to align it to the business challenges and relevancy of the enterprise.

Scorecard Definition

As a result of the strategic process put in place by Michael and his staff, the definition of business objectives are grouped into 4 strategies.

Customers	IT Value	Operational Excellence	Future Orientation	Secured IT
Improve Customer Satisfaction	Reduce Cost	Accelerate Agility	Improve Staff Effectiveness	Increase Compliance
Improve Quality of Delivery	Stewardship of IT Investment	Achieve Process Excellence		Reduce Risk
Improve Responsiveness	Alignment with Business Strategy	Increase Automation Adoption		

For each one of the objectives, the team defined one or more Key Performance Indicators (KPIs) that will be used to measure if the IT Operations meet the business objectives they set or not.

Michael asks his Business Analyst to design a dashboard that will answer the following requirements:

1. Define a Scorecard that contains Objectives and KPIs.
2. Create a view that will provide a high level overview as well as details for each service.
3. Quickly identify problematic areas.
4. Be able to compare the results of each KPI during previous\parallel periods.
5. Be able to compare the results of a KPI for 2 or more different services.

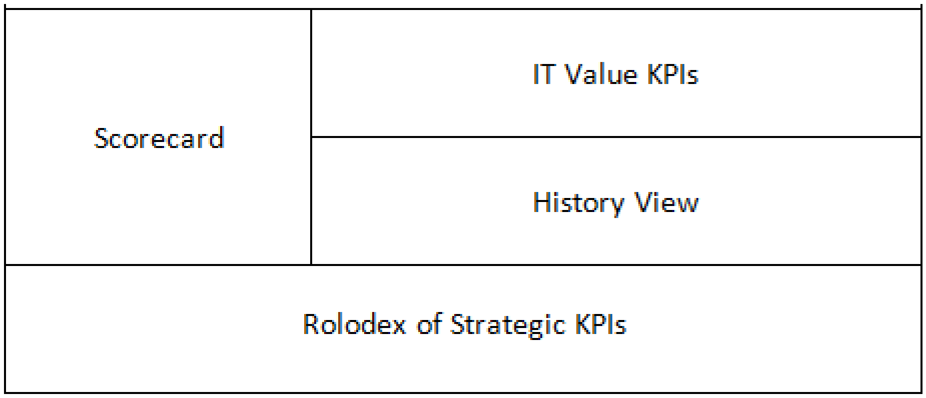
Dashboard Configuration

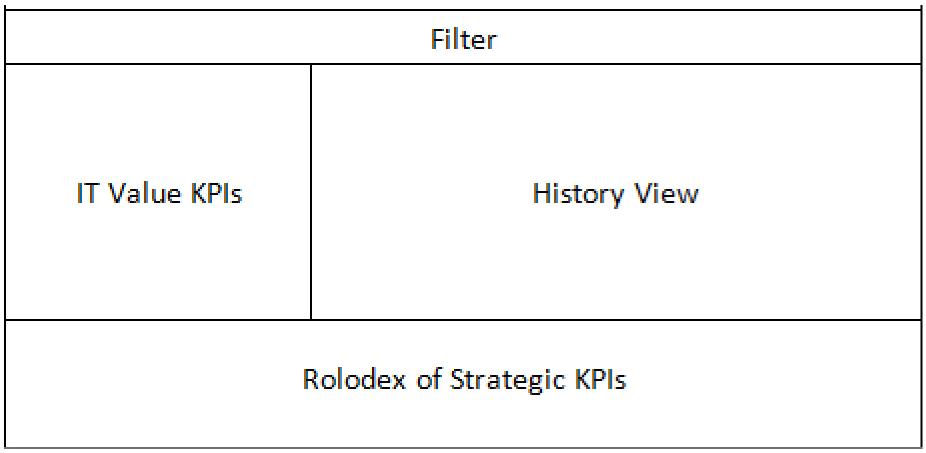
1. The Scorecard Definition in Studio (subset of the OOTB scorecard of VP Ops) should be as follows:

Strategy	Business Objective	KPI
Customers	Improve Customer Satisfaction	% of Affected End Users by Application Quality
		% of Met SLAs
	Improve Quality of Delivery	% of Failed Business Transactions

Strategy	Business Objective	KPI
		Mean Time Between Failures of Services
	Improve Responsiveness	Average Interaction Closure Duration
		Average Time to Procure Hardware
Future Orientation	Improve Staff Effectiveness	% of Project Effort Done by External Resources
IT Value	Alignment with Business Strategy	% of Capex vs. Opex Spending
		% of Time Invested on Strategic Projects
	Reduce Cost	% of Utilization of Network Devices
		% of Software Licenses in Use
	Stewardship of IT Investment	% of IT POR vs. Total Revenue
		Average Cost of IT Delivery Per Customer
Operational Excellence	Accelerate Agility	Average Time to Deploy an Application
		Average Time to Restore
		Average Delivery Time of New Products or Services
	Achieve Process Excellence	% of Successful Patches
		Backup Success Rate
		Time to Resolve an Incident
Operational Excellence	Improve Project Execution	% of Projects on Time
	Increase Automation Adoption	% of Managed Nodes
Secured IT	Increase Compliance	% of Nodes with Compliance Issues
		Frequency of Policy Checks
Secured IT	Reduce Risk	% of Non-Encrypted Traffic
		Mean Time to Recover of Business Data

2. Two Dashboard Page layouts are available:





3. The Filter configuration should be based on the Service name (according to the 4 services mentioned above).

Flow of Events

1. Michael logs in Executive Scorecard during his weekly staff meeting.
2. In his scorecard, he identifies an objective in error state - **Accelerate Agility**. Michael would like to understand what is the underlying reason for not meeting this objective.
3. Agility is specifically critical for him since the enterprise is going through a strategic change – some of the high cost facilities are relocated to low cost regions in Africa and Asia. This kind of transition in workforce has major impact on the IT. Therefore, fast and quick responses are expected in order to support the business and streamline the transition phase.
4. He clicks on the objective and finds out that the **Average Time to Deploy an Application** KPI is in **Error** state since it breached its threshold. He would like to understand if this problem is a global problem or if it is relevant to a specific service.
5. He clicks on the KPI and sees its breakdown for the 4 services IT provides: **ILD.Com**, **CRM**, **ERP** and **Email**.
6. He sees that this problem is relevant only for the **ERP** service since the deployment time of a new virtual server is 90 minutes while the predefined threshold is set to 15 min.
7. The other three services are in a **Good** status.

8. Michael would like to see the full service view by all Strategies, Objectives and KPIs for the ERP service.
9. He sets the filter accordingly.
10. The entire page is filtered and he can see that in addition to the problem with the **Average Time to Deploy an Application** KPI, there are additional KPIs in error state, **% of Met SLAs**, **% of Nodes with Compliance Issues**, and **Average Time to Restore**.
11. Michael assigns Action Items for his staff members to drill into the issues reflected by the KPIs and to provide an update with their conclusions.
12. He writes the following annotations:
    a. **% of Met SLAs** – Ann, we must maintain our SLAs objective at this time, please drill into this issue and make sure our customer satisfaction have not been decreased.
    b. **% of Nodes with Compliance Issues** – James, please understand why we have a regression in our compliance, this must be improved ASAP since a significant number of new users are expected to be activated in the coming week and we must make sure we have minimized the security and regulatory risk.
    c. **Average Time to Restore** – Tom, please understand why the backup restore times have increased. Note that we have gone through a major archiving process as a result of the old locations closure. Did it affect in some way the restore efficiency process? Please set an action plan to improve the restoration time.

End-to-End Flows

This section describes the major end-to-end flows you must 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:

Flow 1: View Data from External Data Sources

This section presents the high level end -to-end flow you can follow to view your Scorecards and KPIs in the HP IT Executive Scorecard Dashboard. The data displayed in the Dashboard is based on data from:

- HP Project and Portfolio Management (PPM)
- HP Asset Manager (AM)
- HP Service Manager (SM)
- HP Business Service Management (BSM) and (Application Performance Management (BSM-APM))
- HP Universal Configuration Management Database (UCMDB)
- HP Application Lifecycle Management (ALM)
- HP Network Automation (NA)
- HP Server Automation (SA)
- HP Network Node Manager (NNM)
- HP Data Protector (DP)
- HP Operation Orchestration (OO)

Prerequisite:

1. 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.

2. 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.

3. 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*.

Perform the integration with the Data Sources:

1. Check the relevant integration documentation for eventual prerequisite steps. For more information, see in the *Content Reference Guide*:

   - "Integrate with the PPM Data Source"
   - "Integrate with the AM Data Source"
   - "Integrate with the SM Data Source"
   - "Integrate with the BSM Data Source"
   - "Integrate with the UCMDB Data Source"
   - "Integrate with the ALM Data Source"
   - "Integrate with the NA Data Source"
   - "Integrate with the NNM Data Source"
   - "Integrate with the BSM Data Source"
   - "Integrate with the DP Data Source"
   - "Integrate with the OO Data Source"

2. Select **Admin** > **Data Source Management** then click **Add data source**. Select the relevant data source instance. Fill out the relevant fields and click **Next**.

   Note: BSM, UCMDB, SA, and ALM data sources do not support multiple instances.

3. Wait until the activation process is complete.

Run the corresponding ETL.

1. **Select Admin** > **ABC Management**.

2. **Schedule a periodic task.** For details, see "To verify or schedule the run_steps command:" in the *Administrator Guide*.

3. **Create a new ETL work-list for loading new data from sources.** For details, see "To load or resume a batch job:" in the *Administrator Guide*.

4. **Schedule the ETL batch to run once or twice a day.** For details, see "To schedule a batch job:" in the *Administrator Guide*

5. **Check the status of the ETL process to see if it has completed.** For details, see "To view active streams:" in the *Administrator Guide*. You can then drill down for more details. For more details, see "DW ABC Streams Management User Interface" in the *Administrator Guide*.

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

1. Click the **Studio** tab.
2. Click the **Show Trees Side-by-Side** icon in the top right corner of the Active KPIs pane to display the KPI Library pane.
3. Select the relevant Scorecards, Perspectives, Objectives, and KPIs of interest to your organization and drag them from the KPI Library (templates) to the Active KPIs Pane to activate them.
4. You can now run calculations or historical calculations depending on your needs:
   a. 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 "Recalculate Displayed Values after Configuration Change" in the *Business Analyst Guide*.

   b. 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 "Calculate Displayed Values after Configuration Change" in the *Business Analyst Guide*.

   c. In the Active KPIs pane, click the **Calculation options** button in the Active KPIs toolbar, and select the **Schedule context calculation** option. In the Business Context Calculation Scheduling dialog box that opens, select the schedule. For details, see "Schedule Business Context Calculations" in the *Business Analyst Guide*.

   d. In the Active KPIs pane, click the **Calculation options** button in the Active KPIs toolbar, and select the **Calculation monitoring** option . In theCalculation Monitoring Dialog Box dialog box that opens, select the schedule. For details, see "Monitor the Calculation and Recalculation Processes" in the *Business Analyst Guide*.
5. 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 *Business Analyst Guide*.

Flow 2: 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 an alternate data source in the HP IT Executive Scorecard Dashboard.

The data displayed in the Dashboard is based on data from:

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

Prerequisite:

1. 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.
2. 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.
3. 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*.

Perform the integration with an alternate data source:

1. 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).
2. To activate the ALT content pack, go through the automation backend tool. For details, see "The Automation Tool" (on page 1) in the *Administrator Guide*.
3. Wait until the activation process is complete.

For more information, see "Alternate Sources Integration" in the *Content Reference Guide*.

Run the corresponding ETL.

1. **Select Admin** > **ABC Management**.
2. **Schedule a periodic task.** For details, see "To verify or schedule the run_steps command:" in the *Administrator Guide*.
3. **Create a new ETL work-list for loading new data from sources.** For details, see "To load or resume a batch job:" in the *Administrator Guide*.
4. **Schedule the ETL batch to run once or twice a day.** For details, see "To schedule a batch job:" in the *Administrator Guide*
5. **Check the status of the ETL process to see if it has completed.** For details, see "To view active streams:" in the *Administrator Guide*. You can then drill down for more details. For more details, see "DW ABC Streams Management User Interface" in the *Administrator Guide*.

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

1. Click the **Studio** tab.
2. Click the **Show Trees Side-by-Side** icon in the top right corner of the Active KPIs pane to display the KPI Library pane.
3. Select the relevant Scorecards, Perspectives, Objectives, and KPIs of interest to your organization and drag them from the KPI Library (templates) to the Active KPIs Pane to activate them.
4. You can now run calculations or historical calculations depending on your needs:
   a. 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 "Recalculate Displayed Values after Configuration Change" in the *Business Analyst Guide*.

   b. 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 "Calculate Displayed Values after Configuration Change" in the *Business Analyst Guide*.

   c. In the Active KPIs pane, click the **Calculation options** button in the Active KPIs toolbar, and select the **Schedule context calculation** option. In the Business Context Calculation Scheduling dialog box that opens, select the schedule. For details, see "Schedule Business Context Calculations" in the *Business Analyst Guide*.

   d. In the Active KPIs pane, click the **Calculation options** button in the Active KPIs toolbar, and select the **Calculation monitoring** option . In theCalculation Monitoring Dialog Box dialog box that opens, select the schedule. For details, see "Monitor the Calculation and Recalculation Processes" in the *Business Analyst Guide*.
5. 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 *Business Analyst Guide*.

Flow 3: View Data from an External File

You can upload data from an external file into the Studio using Context Designer:

1. Upload data in .CSV format using the Context Designer. For details, see "Create and Manage Contexts Using Context Designer" in the *Administrator Guide*.
2. Create KPIs based on the new Context.
3. Calculate the KPIs.
4. Display the calculation results in the Dashboard.

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 "Activate Scorecards, Perspectives, Objectives, Metrics, or KPIs Using Templates" in the *Business Analyst Guide*.
- Create KPIs by cloning existing active KPIs. For details, see "Create Active Scorecards, Perspectives, Objectives, Metrics, or KPIs" in the *Business Analyst Guide*.
- Customize a formula or filter. For details, see "Modify a KPI or Metric Formula" or "Modify a KPI or Metric Filter" in the *Business Analyst Guide*.
- Customize a KPI's Context. For details, see "Customize a KPI or a Metric Business Context" in the *Business Analyst Guide*.
- Enrich the Dashboard contents with Metric Breakdowns and KPIs, overrides, Cascading Scorecards, and more. For details, see "Enrich the Dashboard Contents" in the *Business Analyst Guide*.
- Create and manage Breakdowns for a KPI or a Metric according to the KPI or a Metric dimensions. For details, see "Manage KPI Breakdowns" or "Manage Metric Breakdowns" in the *Business Analyst Guide*.

  When you configure a KPI Breakdown, 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 KPI Breakdowns. In addition, you may want to change the thresholds of some of the KPI Breakdowns. For details, see "Manage Overrides" in the *Business Analyst Guide*.
- 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 *Business Analyst Guide*.

Other Customizations

You can also customize the following:

- **Objectives, Perspectives, or Scorecards.** For details, see "Configure an Objective", "Configure a Perspective", "Configure a Scorecard", or "Assign/Unassign KPIs to/from Objectives" in the *Business Analyst Guide.*
- **Dashboard Pages.** For details, see "Add a Page to the Dashboard" or "Configure a Page Layout" in the *Business Analyst Guide*.

How to Find Information

Executive Scorecard Help Center includes the following documents:

Document	Description	Available Formats	Location
Release Notes	Includes last minute information, fixed issues, and limitations.	PDF	DVD
Support Matrix	Describes hardware requirements, software requirements, and supported environments.	PDF	DVD
Installation and Configuration	Enables you to select installation and configuration options, and then view or print a customized guide.	HTML	DVD
Upgrade Guide	Describes how to upgrade Executive Scorecard to the new version	PDF	DVD
Getting Started Guide	Provides useful information for getting up and running with Executive Scorecard.	"Getting Started with IT Executive Scorecard " on page 7 and *Getting Started with IT Executive Scorecard* PDF	Help Center and DVD
General Administration Guide	Describes Executive Scorecard Administration tasks.	Help and *Administrator Guide* PDF	Help Center and DVD
Business Analyst User Guide	Describes how to work with Executive Scorecard Studio and Dashboard to create and activate Scorecards, Perspectives, Objectives, Metrics, and KPIs.	Help and *Business Analyst Guide* PDF	Help Center and DVD
Financial Analyst User Guide	Describes how to use FPA to consolidate and allocate planned and actual costs from HP Asset Manager, HP Project and Portfolio Management, and alternate data.	Help and *Financial Analyst Guide* PDF	Help Center and DVD
Content Reference Guide	Provides reference information on Contexts (universes), out-of-the-box KPIs and metrics, Web intelligence and operational	Help and *Content Reference Guide* PDF	Help Center and DVD

Document	Description	Available Formats	Location
	reports, and integrations with supported data sources.		
Content Extension Guide	Includes information on extending content and developing new content using the Integrated Development Environment (IDE).	Available from the Executive Scorecard 9.30 in the HP Software Product Manual Site (**http://h20230.www2.hp.com/selfsolve/manuals**).	
Open Source and Third Party Software License Agreements	Contains the license information for open source and third-party software included in Executive Scorecard.	PDF	Help Center and DVD
Getting Started with XS for Smartphone	Provides information on viewing Executive Scorecard on a smartphone.	Help and *Getting Started with XS for Mobile* PDF	Help Center and DVD
Getting Started with XS for Tablet	Provides information on viewing Executive Scorecard on a tablet.	Help and *Getting Started with XS for Tablet* PDF	Help Center and DVD

How to Search Help Center

To search Help Center, click the Search button at the bottom left corner of the Help Center Home page.

You can search for a single word, multiple words, or a specific combination of words that are always next to each in the same order. To search for a specific combination of words, enter the search words within quotation marks. For example: “out-of-the-box KPIs”.

Documentation Updates

Executive Scorecard documentation is also available on the HP Software Manuals site.

To check for recent updates or to verify that you are using the most recent edition of a document, go to:

http://h20230.www2.hp.com/selfsolve/manuals

This site requires that you register for an HP Passport and sign in. To register for an HP Passport ID, go to:

http://h20229.www2.hp.com/passport-registration.html

Or click the **New users - please register** link on the HP Passport login page.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HP sales representative for details.

Videos

The following videos are available on the Internet:

HP IT Executive Scorecard -- Overview (http://www.youtube.com/watch?v=-TAySeyF4bU)

A Day in the Life of a VP of Operations (http://www.youtube.com/watch?v=nx_GMlLrrUI)

Java™
COMPATIBLE