

HP IT XS Financial Management for Tablet

For the Windows® operating system

Software Version: 1.00

Getting Started Guide

Document Release Date: June 2012

Software Release Date: June 2012



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

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- Manage support contracts
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Release Notes

What's New in IT XS Financial Management for Tablet Version 1.00

The Financial Planning and Analysis component of Executive Scorecard includes mobile capabilities (IT XS Financial Management for Tablet), powered by HP Anywhere to provide you with the capability to view the status of the Service, Customer, Organization, or Program status for the year and to drill down to view the KPI Breakdowns status over time from your tablet.

IT XS Financial Management for Tablet, allows executives to access significant IT financial information anytime and anywhere. The mini app is designed to focus on those KPIs that are critical to the business success. Executives can view their Dashboard pages with the relevant KPIs up-to-date and overtime results and can collaborate with their colleagues to improve these results. With IT XS Financial Management for Tablet, executives can easily navigate between different business domains to get an instant access to the full picture of their finances wherever and whenever they want.

Support Matrix

Executive Scorecard version	IT XS Financial Management for Tablet version	HP Anywhere version
9.30	1.00 Platform: <ul style="list-style-type: none">• iOS 4.0 and later• Android 3.2 and later	<p>If you want to work only with the IT XS Financial Management for Tablet, XS for Smartphone and XS for Tablet mini apps (no other HP products miniapps), install HP Anywhere 9.00 – Limited.</p> <p>If you want to work with the IT XS Financial Management for Tablet, XS for Smartphone or XS for Smartphone mini apps and other HP mini apps, install HP Anywhere 9.01.</p> <p>The following languages are supported: English, Brazilian Portuguese, French, German, Japanese, and Spanish.</p>

Internationalization and Localization

Internationalization

Localization is the process by which software applications are adapted to suit a specific local market or *locale*.

Executive Scorecard supports multi-language data input including multi-language user face (MLU). You can switch the language displayed in the application user interface by switching the Internet Explorer locale settings.

Executive Scorecard is I18N-compliant and can be installed on any Operating System locale. However, it is not UNICODE-compliant and the server supports a single locale and single character set at a time, as set by the Operating System and the environment you are using. Using the English character set is always supported in addition to the character set in the local Operating System. For example, if you install Executive Scorecard in a Japanese environment, you can use the English character set as well as the Japanese character set.

Localization

The user interface of IT XS Financial Management for Tablet has been extended to support multiple languages. This version includes translated sources.

These languages are:

- English
- Brazilian Portuguese
- French
- Spanish
- German
- Japanese

IT XS Financial Management for Tablet Mini App Overview

IT XS Financial Management for Tablet allows executives to access significant business information anytime and anywhere. The mini app is designed to focus on the status of the Service, Customer, Organization, or Program status that are critical to the business success. Executives can view the up-to-date and over-time statuses of the relevant Service, Customer, Organization, or Program.

Getting Started with the IT XS Financial Management for Tablet Mini App

The mini app is the mobilized version of the Financial Planning and Analysis component of the Executive Scorecard application.

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, you can then drill down for more details about the status of the Service, Customer, Organization, or Program status that are critical to your business success. You can also view the up-to-date and over-time results for the relevant Service, Customer, Organization, or Program.

Audience

This document is designed for the following audience:

- The administrator. For details, see "[Install and Configure IT XS Financial Management for Tablet](#)" on page 11. 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 IT XS Financial Management for Tablet](#)" on page 13.

Related Information

The following documents include additional information related to HP Anywhere and the IT XS Financial Management for Tablet mini app:

- *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*
- *Administrator Guide*
- *Financial Analyst Guide*
- *Content Reference 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 [HP Software Product Manual Site](http://h20230.www2.hp.com/selfsolve/manuals) (<http://h20230.www2.hp.com/selfsolve/manuals>).

To replace the current documentation in your system with the recently updated documentation obtained from the Manual site, proceed as follows:

- Copy the online help to the **<HPXS>\agora\docs\<language_country_code>** directory where **<language_country_code>** is: **en_US** for English language documentation and **ja_JP** for Japanese language documentation.
- Copy the PDFs to the **<HPXS>\agora\docs\<language_country_code>\pdfs** directory where **<language_country_code>** is: **en_US** for English language documentation and **ja_JP** for Japanese language documentation.
- Copy the post-install online help to the **<HPXS>\agora\configwizard\docs** directory.

Install and Configure IT XS Financial Management for Tablet

Note: This section's audience is the administrator.

This section provides information on how to install and configure IT XS Financial Management for Tablet.

Install and Configure IT XS Financial Management for Tablet

The IT XS Financial Management for Tablet mini app runs on the HP Anywhere platform.

To configure IT XS Financial Management for Tablet:

1. If you want to work:
 - a. With the IT XS Financial Management for Tablet mini app and other HP mini apps, install HP Anywhere. For installation details, see *HP Anywhere Installation and Configuration Guide*.
 - b. Only with the IT XS Financial Management for Tablet mini app (no other HP products mini apps), proceed as follows:
 - i. Go to [HP Software Support Online \(SSO\)](http://support.openview.hp.com) (<http://support.openview.hp.com>).
 - ii. Log in with your HP Passport
 - iii. Tap the **Downloads** tab.
 - iv. Tap **Software Updates**.
 - v. Tap **My Updates**.
 - vi. Select your SAID in the drop-down list.
 - vii. Check acceptance of T&C and submit.

If a message stating that SAID is invalid is issued, go back to previous page and resubmit until successful.
 - viii. From the Product List, expand **Service Management Center**.
 - ix. Check **HP Executive Scorecard 9.30 SW E-Media** (or the relevant language) and scroll down to **Get software updates**.
 - x. Tap the relevant **Get Software**.
 - xi. Select the HP Anywhere icon on the right.
 - xii. Select whether you want to download directly or via Download Manager.
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 IT XS Financial Management for Tablet mini app.
 - b. Create an HP IT Executive Scorecard user account with necessary access grants.

Tip: Do not install HP Anywhere and HP Executive Scorecard on the same server. If you do, the MQ Broker for the first application installed on the server is overwritten by the MQBroker of the second application.

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 IT XS Financial Management for Tablet 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 the HP Anywhere client from your mobile device. The user account information includes 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 IT XS Financial Management for Tablet

Note: This section audience is the Executive user.

Use the IT XS Financial Management for Tablet mini app to display the status of the Service, Customer, Organization, or Program status that are critical to the business success. You can also view the up-to-date and over-time statuses of the relevant Service, Customer, Organization, or Program

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 IT XS Financial Management for Tablet Mini App" below](#)
- ["Configure the Mini App" on next page](#)
- ["Configure the Mini App Alerts" on page 15](#)
- ["View Over Time Status of the Service, Customer, Organization, or Program and Related Details" on page 17](#)
- ["Access Other Mini Apps" on page 21](#)

Prerequisites for Using the IT XS Financial Management for Tablet Mini App

Before you can log in to HP Anywhere on your tablet 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 tablet. The user account information includes username, 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 tablet has Internet connection.
- Download the HP Anywhere client from the provided link by the admin or download it from Apple store or the Android market place and log into HP Anywhere on the mobile device.
- The HP Anywhere icon should appear on your device.

You can now log in to HP Anywhere and use the IT XS Financial Management for Tablet mini app from your tablet.


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

You can view requests and perform request approval actions. For details, see ["View Over Time Status of the Service, Customer, Organization, or Program and Related Details" on page 17](#).





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

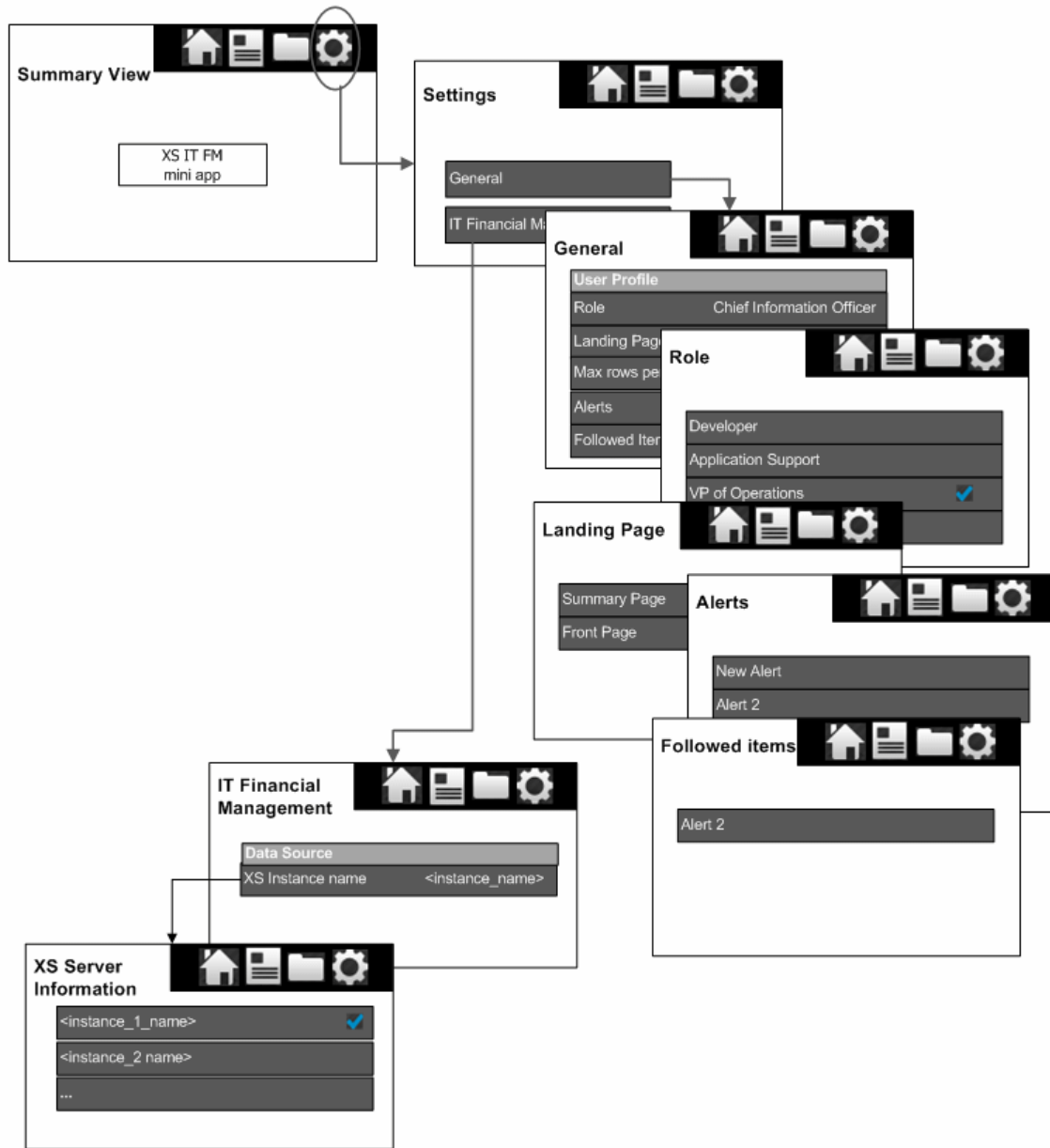
Configure the Mini App

To configure the mini app:

1. Tap the HP Anywhere icon.
2. Enter the user, password, and URL of HP Anywhere (the first time you access the mini app).
3. The **Summary View** displays a list of the mini apps installed on your Tablet 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:

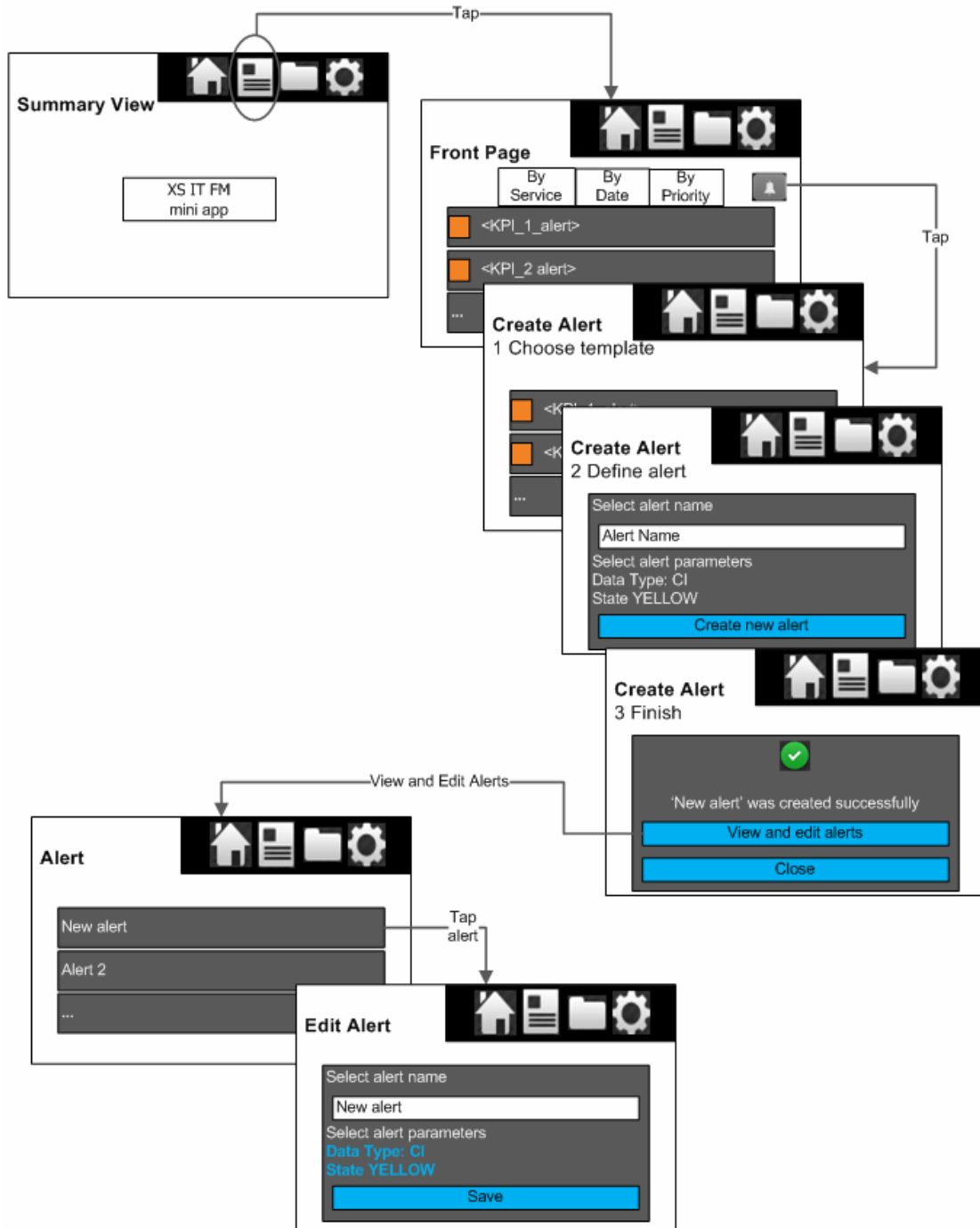
-  to go back to the Summary View from all the other pages.
-  to access the Front Page. For details, see ["Configure the Mini App" above](#) ["Configure the Mini App Alerts" on next page](#) or ["View Over Time Status of the Service, Customer, Organization, or Program and Related Details" on page 17](#).
-  to view a list of the other mini apps. For details, see ["Access Other Mini Apps" on page 21](#).
-  to access the Settings page where you can configure the IT XS Financial Management for Tablet 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 you access the mini app).
3. In the **Summary View**, tap  to display the alert information in the Front Page.
4. Tap  to configure, view, or edit the alerts.



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.

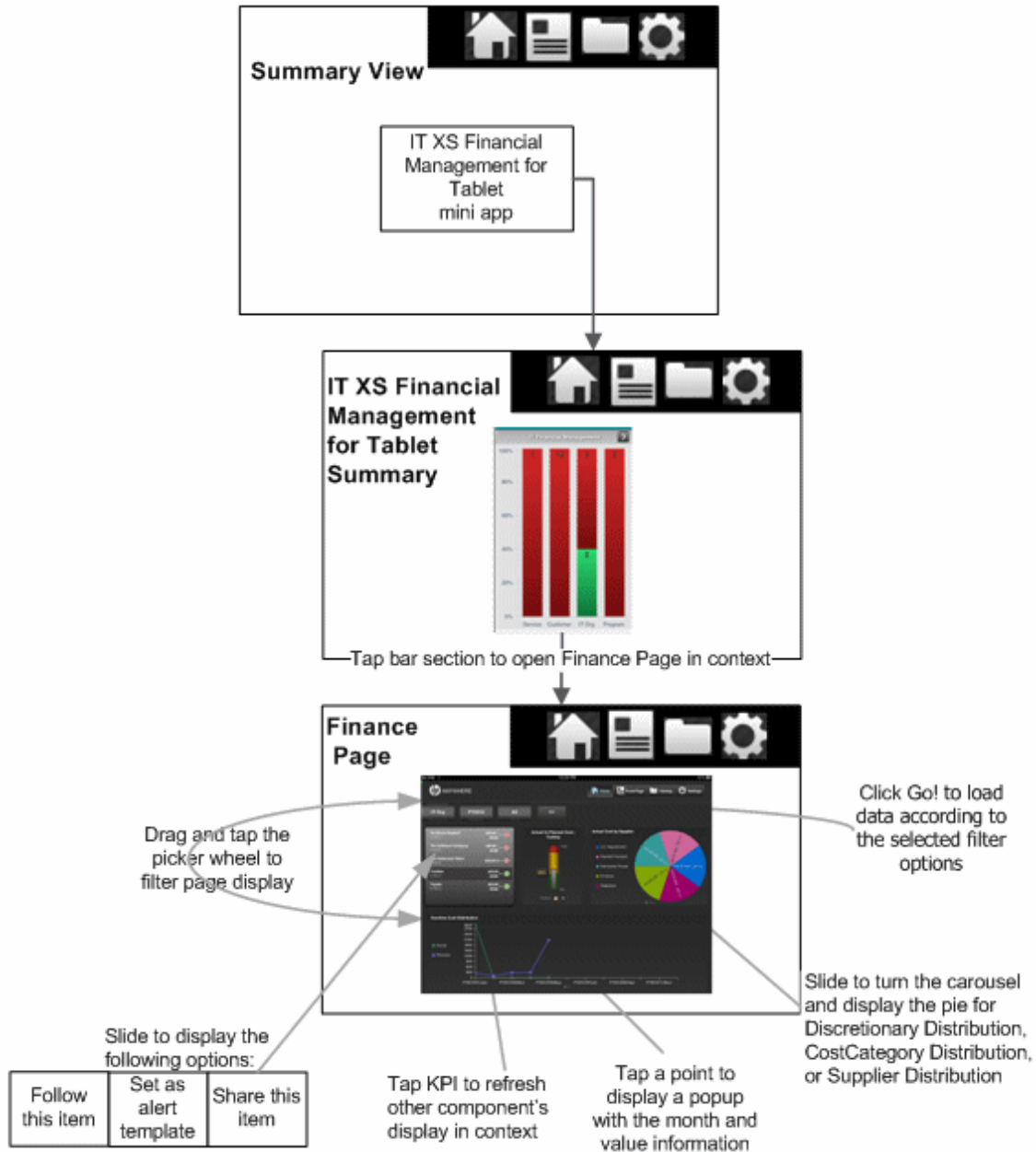
You can select to follow a specific KPI by swiping it in the Front Page and tapping **Follow this item** (the Executive user can also follow a specific KPI using the Followed Item setting, for details, see ["Configure the Mini App" on page 14](#)). If this KPI changes status to normal, it disappears from the Front Page.

View Over Time Status of the Service, Customer, Organization, or Program and Related Details

To view the over time status of the Service, Customer, Organization, or Program, and related information:

1. Tap the HP Anywhere icon.
2. Enter the user, password, and URL of HP Anywhere (the first time you access the mini app).
3. In the **Summary View**:
 - a. Tap the mini app.
 - b. Swipe the graph or tap one of the bars to display the **Finance Page**.
 - c. Drill down to the **Finance Page** by tapping the bars, by pressing the button in the Summary view panel, or by tapping the arrow in the top right side of the summary view panel

The **Finance Page** displays distributed information by dimensions and overtime information for the selected Service,



The **IT XS Financial Management for Tablet Summary** page displays a column graph representing the status of the Service, Customer, Organization, or Program categories. Each section of the column represents the percentage of the category KPIs with the relevant status. Red is Critical status, and green is OK status. This page provides an organization's CIO, IT Financial Manager, IT Financial Analyst, or IT Manager with a financial overview of the Business Services, Organizations, Programs, or Customers from the perspective of staying between its defined Financial Budget.


- Business Services/Organizations/Programs/Customers component:** This component shows a list of all the business services, organizations, programs, or customers in your enterprise, according to the selected Select Page Dimension Type, available in the selected fiscal year, and according to the selected status. When you select an element in this

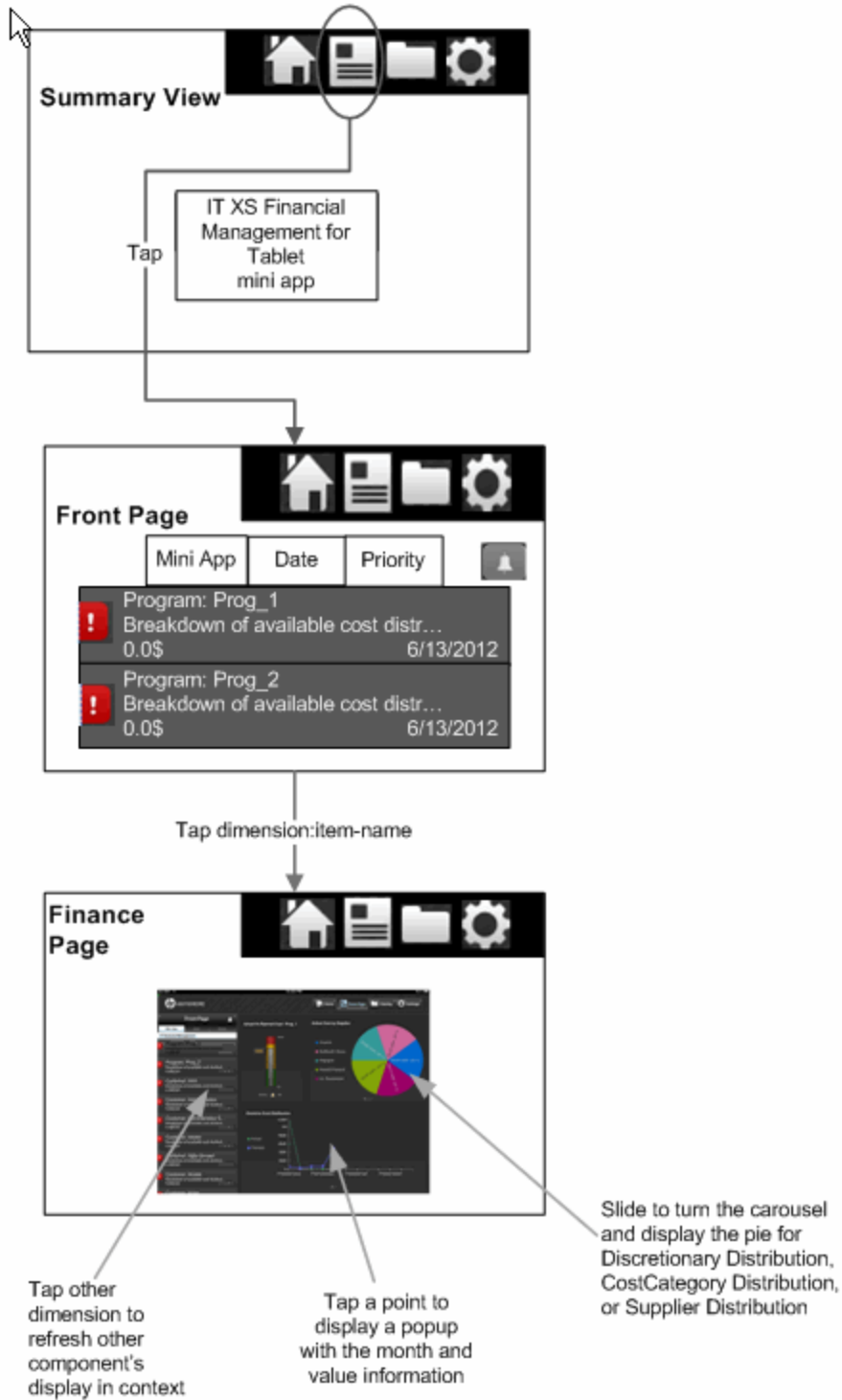
component, the data in the rest of the page is refreshed in each one of the other components displayed on the page.

- **Actual Cost Vs Planned Cost component:** The component displays the total IT planned costs versus actual costs for the selected fiscal year and the selected business service, organization, program, or customer.
- **Supplier Distribution component:** The component enables you to view the cost distribution of the top five suppliers listed by the highest actual cost for the selected year.
- **Cost Category Distribution component:** The component enables you to view the actual cost distribution by cost category for the selected year.
- **Discretionary Distribution component:** The component enables you to view the distribution of your total discretionary and non-discretionary costs for the selected year.
- **Overtime Cost Distribution Component :** This component displays the planned cost versus the actual cost month-by-month for the selected Business Service, Organization, Program, or Customers. The chart starts with the first month of the selected fiscal year.
- **Year-Over-Year Actual vs Planned Cost Component:** This component displays, for up to 3 years (current, previous, and two years ago) the year-over-year ratio of actual (spent) per month vs planned total cost for the fiscal year. The chart starts with the first month of the selected fiscal year. This chart enables the business analyst to compare monthly costs spending over the years.

For details about these components, see [View the Distribution of Cost \(Cost Distribution Overview Page\)](#) in the *Financial Analyst Guide*.

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 all the Service, Customer, Organization, or Program items appearing in the current fiscal year Budget that have an error status.
 - b. Tap an item to display the **Finance Page** detailed information about the selected item.



The **Finance Page** provides an organization's CIO, IT Financial Manager, IT Financial Analyst, or IT Manager with a financial overview of the Business Services, Organizations, Programs, or Customers that have exceeded their Financial Budget in the current fiscal year.

- **Business Services/Organizations/Programs/Customers in Critical Status list component:** This component shows a list of all the business services, organizations, programs,


or customers in your enterprise with a cost that exceeded the budget during the fiscal year. You can click another item in the list to display its details in the other components in the page.

- **Actual Cost Vs Planned Cost component:** The component displays the total IT planned costs versus actual costs for the current fiscal year and the selected business service, organization, program, or customer.
- **Supplier Distribution component:** The component enables you to view the cost distribution of the selected supplier for the current fiscal year.
- **Cost Category Distribution component:** The component enables you to view the actual cost distribution for the selected cost category for the current fiscal year.
- **Discretionary Distribution component:** The component enables you to view the distribution of the discretionary and non-discretionary costs for the current fiscal year.
- **Overtime Cost Distribution Component :** This component displays the planned cost versus the actual cost month-by-month for the selected Business Service, Organization, Program, or Customers starting with the first month of the current fiscal year.


For details about these components, see [View the Distribution of Cost \(Cost Distribution Overview Page\)](#) in the *Financial Analyst Guide*.

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 Tablet. 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 14](#).

