

# Executive Scorecard

For the Windows® Operating System

Software version 1.00

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## Customization Guide

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# 1 Customization Guide Overview

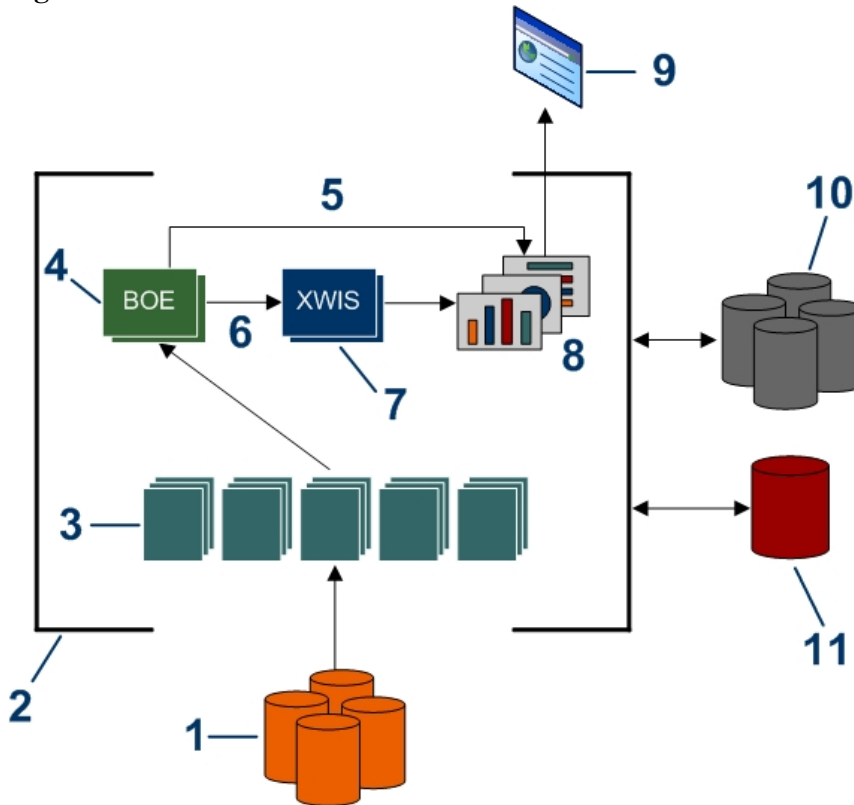
The Executive Scorecard Customization Guide provides information about the elements that the Executive Scorecard comprises. Only a user with expertise using SAP® BusinessObjects Enterprise (BOE) applications such as InfoView, Universe Designer, and Xcelsius should modify the BOE-based elements. This guide details how the elements, Xcelsius components, Web Intelligence (Webi) reports, and universes, are integrated with the Antivia Xcelsius Web Intelligence Integration Suite to create the Executive Scorecard product.

This guide provides guidelines for modifying the existing, out-of-box objects. However, HP recommends that you contact HP Software Support for assistance with extensive customizations. For more information about the products, services, and support that HP Software offers, visit the HP Software Support Online web site at <http://www.hp.com/go/hpsupport>.

## Executive Scorecard Architecture

Figure 1: Executive Scorecard Architecture on page 7 shows the high-level configuration of all of the components that Executive Scorecard comprises. This guide provides details about the Xcelsius components, Web Intelligence (Webi) reports, universes, and views used in Executive Scorecard. Table 1: Executive Scorecard Architecture Descriptions on page 8 lists the description for each of the numbered items. Figure 2: Executive Scorecard Data Flow on page 9 shows a more detailed view of the data flow. Table 2: Executive Scorecard Data Flow Descriptions on page 9 provides descriptions of the data flow items.

Figure 1: Executive Scorecard Architecture

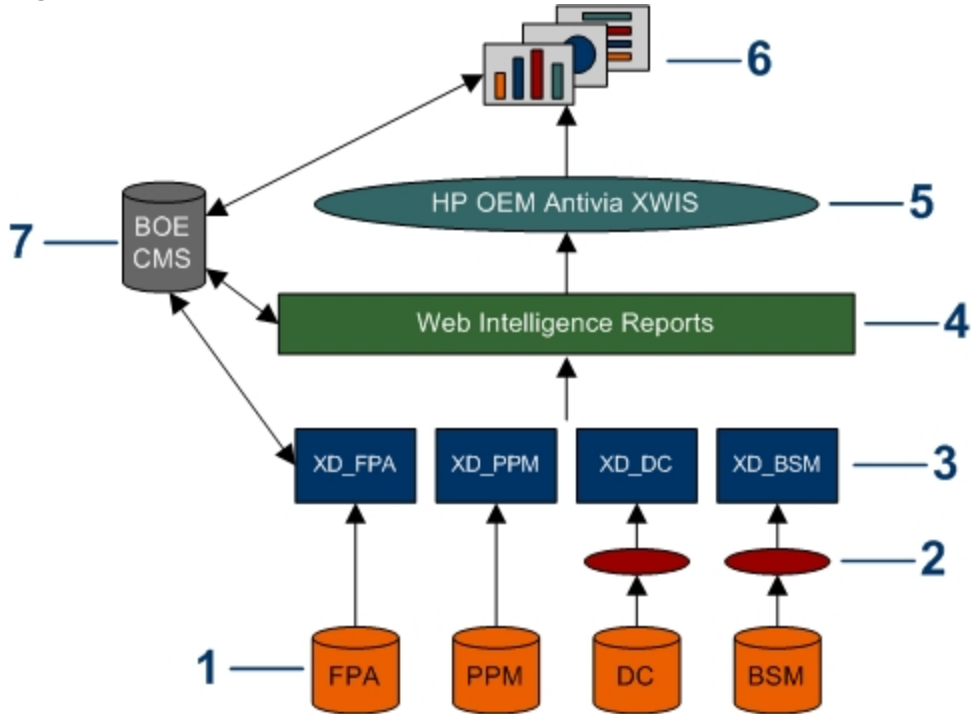


**Table 1: Executive Scorecard Architecture Descriptions**

<b>Item</b>	<b>Description</b>
1	Source Databases: Executive Scorecard is configured out-of-box to use data from HP Business Service Management 8.00, HP DecisionCenter 2.0.xx, HP IT Analytics Financial Planning & Analysis 2.0.x, and HP Project and Portfolio Management 7.50.
2	The Executive Scorecard server.
3	Analytics Content Packs (BIAR files): XD_CIO: Contains metadata and KPI reports for all four sources as well as the Executive Scorecard page analytics. XD_BSM: Contains the universe and metric reports for the components that use Business Service Management data. XD_DC: Contains the universe and metric reports for the components that use DecisionCenter data. XD_FPA: Contains the universe and metric reports for the components that use Financial Planning & Analysis data. XD_PPM: Contains the universe and metric reports for the components that use Project and Portfolio Management data.
4	SAP® BusinessObjects Enterprise XI 3.1 applications.
5	Executive Scorecard uses visual components from BusinessObjects Enterprise.
6	The Antivia Xcelsius Web Intelligence Integration Suite enables Executive Scorecard to retrieve data from the BusinessObjects Enterprise server.
7	Antivia Xcelsius Web Intelligence Integration Suite applications.
8	The Executive Scorecard application.
9	Browser: Internet Explorer 7.
10	MSSQL Databases: Executive Scorecard database, BusinessObjects Enterprise CMS database, BusinessObjects Enterprise Audit database, and Antivia Xcelsius Web Intelligence Integration Suite database.
11	Security: Lightweight Directory Access Protocol (LDAP) or Active Directory authentication.



**Figure 2: Executive Scorecard Data Flow**



**Table 2: Executive Scorecard Data Flow Descriptions**

Item	Description
1	Source databases: FPA: SQL Server PPM: Oracle DC: SQL Server or Oracle BSM: SQL Server or Oracle
2	SQL Server and Oracle views with date handling. Each view is stored in the source database.
3	Universes for each data source. The FPA and PPM universes provide date handling.
4	Metric, metadata, and key performance indicator (KPI) Web Intelligence (Webi) reports.
5	The Antivia Xcelsius Web Intelligence Integration Suite reads data automatically from a scheduled Webi report that is cached on the BusinessObjects Enterprise server.
6	BusinessObjects Enterprise Xcelsius components that display the data in the Executive Scorecard application.
7	The BusinessObjects Enterprise (BOE) Central Management Server (CMS) database manages the universes, Webis, and Xcelsius components.



## 2 Work with Existing BusinessObjects Enterprise-Based Elements

This section provides instructions for working with the existing out-of-box items that are created with BusinessObjects Enterprise (BOE) applications: BOE Xcelsius components, BOE Web Intelligence (Webi) reports, and BOE Universes.

### BOE-Based Element Reference Information

This section provides reference information to show the relationships between the Executive Scorecard Xcelsius components and their associated Web Intelligence (Webi) reports and universe files. This section also provides the platform location for the component, Webi, and universe source files.

#### Xcelsius Component Naming Conventions

This section provides a list of each out-of-box component by source name. It lists the default page for the component, and it also provides the name for the component as it appears in the Component Gallery. For information about the corresponding data sources and Web Intelligence reports for the components, see [Xcelsius Component and Webi Reference on page 14](#).

Some components are wired so that they can interact with each other on a page. For example, on the Financial page, if you select a key performance indicator (KPI) on the Financial Scorecard (XD\_Financial\_Scorecard\_P) component, the Financial KPI Trend (XD\_Financial\_KPI\_Trend\_S) component displays information related to that KPI. The Financial Scorecard component and the Financial KPI Trend components are wired so that the Financial Scorecard component publishes information to the Financial KPI Trend component. And the Financial KPI Trend component is wired to subscribe to the Financial Scorecard component.

Component file names are appended with the following values to indicate whether the component is a subscriber, publisher, or a standalone component:

- **\_S**: The component currently subscribes to another component or is configured to be a subscriber in the future.
- **\_P**: The component currently publishes to another component.
- **\_N**: The component is a standalone component. It is not wired to subscribe or publish to other components.

Source File Name and Component Title as Shown on Default Page	Component Gallery Name	Default Page
XD_ActualVsPlannedCost_Vertical_S Actual vs. Planned Cost for FY2010 (x100,000)	Actual vs. Planned Cost (Subscriber)	Financial, Summary

Source File Name and Component Title as Shown on Default Page	Component Gallery Name	Default Page
XD_DiscVsNonDiscCost_Pie_S Discretionary vs. Non-Discretionary for FY2010 (x100,000)	Disc vs. NonDisc Cost (Subscriber)	Financial, Summary
XD_CapexVsOpexCost_Pie_S Capex vs. Opex for FY2010 (x100,000)	Capex vs. Opex Cost (Subscriber)	Financial, Summary
XD_DepartmentActualVsPlan_Bullet_N Actual vs. Planned Costs Top 5 Organizations	Actual vs. Planned by Organizations Top 5	Financial
XD_Financial_Scorecard_P No title	Financial Scorecard (Publisher)	Financial
XD_Financial_KPI_Trend_S No title	Financial KPI Trend (Subscriber)	Financial
XD_Financial_Metadata_N Financial Dashboard	Financial Metadata	Financial
XD_OverallYTDProjectHealth_HorizontalStack_N Project Health for Active Projects	Project Health for Active Projects	Program, Summary
XD_ProgramActualVsPlanned_Bullet_N Actual vs. Planned Cost Top 5 Programs	Actual vs. Planned by Program Top 5	Program
XD_ProjectHealthByRegion_Top5_HorizontalStack_N Project Health Top 5 Regions	Project Health by Region Top 5	Program
XD_SpendingbyBO_Pie_S Budget Allocation by Business Objective	Budget Alloc by Business Objective (Subscriber)	Program
XD_Program_Scorecard_P No title	Program Scorecard (Publisher)	Program
XD_Program_KPI_Trend_S No title	Program KPI Trend (Subscriber)	Program
XD_Program_Metadata_N Program Dashboard	Program Metadata	Program
XD_MonitoredAvailability_Pie_S Monitored Availability to SLA	Monitored Availability (Subscriber)	Service
XD_SLABreached_Vertical_S Reported Exceptions to SLA	Reported Exceptions to SLA (Subscriber)	Service
XD_SLAIcidentResponseTime_Vertical_S Incident Response Time to SLA	Incident Response Time to SLA (Subscriber)	Service

<b>Source File Name and Component Title as Shown on Default Page</b>	<b>Component Gallery Name</b>	<b>Default Page</b>
XD_ServiceActualVsPlanned_Bullet_N Actual vs. Planned Cost Top 5 Services	Actual vs. Planned by Services Top 5	Service
XD_Service_Scorecard_P No title	Service Scorecard (Publisher)	Service
XD_Service_KPI_Trend_S No title	Service KPI Trend (Subscriber)	Service
XD_Service_Metadata_N Service Dashboard	Service Metadata	Service
XD_ProjActualVsPlannedCost_Vertical_S Actual vs. Planned Cost Projects for FY2010 (x100,000)	Actual vs. Planned by Project (Subscriber)	Summary
XD_ServicePerformanceAnalysis_Sparkline_N Service Performance Analysis	Service Performance Analysis	Summary
XD_ServiceLevelAchievementOvertime_StackedColumn_S Monitored Availability to SLA	Monitored Availability to SLA (Subscriber)	Summary
XD_Summary_Metadata_N Summary Dashboard	Summary Metadata	Summary

## Xcelsius Component and Webi Reference

The table below lists the corresponding default data source and the associated Web Intelligence (Webi) reports and their location for each Xcelsius component.

### Financial Components

Xcelsius Component	Default Data Source	Associated Webi Report (and BOE InfoView Folder)
XD_ActualVsPlannedCost_Vertical_S	FPA	XD_FPA_ActualCost (XD_FPA)
		XD_FPA_PlannedCost (XD_FPA)
XD_DiscVsNonDiscCost_Pie_S	FPA	XD_FPA_Discretionary (XD_FPA)
		XD_FPA_Non_Discretionary (XD_FPA)
XD_CapexVsOpexCost_Pie_S	FPA	XD_FPA_Opex (XD_FPA)
		XD_FPA_Capex (XD_FPA)
XD_DepartmentActualVsPlan_Bullet_N	FPA	XD_FPA_ActualvsPlan (XD_FPA)
XD_Financial_Scorecard_P	FPA and PPM	XD_Financial_KPI (XD_Financial): FPA Tab 1: Financial Control FPA Tab 2: Innovation Delivery PPM Tab 4: Unhealthy Budget Risk
	FPA	XD_FPA_ActualCost (XD_FPA)
		XD_FPA_BusinessServiceActualCost (XD_FPA)
XD_Financial_KPI_Trend_S	FPA and PPM	XD_Financial_KPI (XD_Financial): FPA Tab 1: Financial Control FPA Tab 2: Innovation Delivery PPM Tab 4: Unhealthy Budget Risk
	FPA	XD_FPA_Discretionary (XD_FPA)
		XD_FPA_ActualCost (XD_FPA)
		XD_FPA_PlannedCost (XD_FPA)
		XD_FPA_BusinessServiceActualCost (XD_FPA)
		XD_Financial_Metadata (XD_Financial)
XD_Financial_Metadata_N	FPA and PPM	XD_Financial_Metadata (XD_Financial)

## Program Components

Xcelsius Component	Default Data Source	Associated Webi Report (and BOE InfoView Folder)
XD_OverallYTDProjectHealth_HorizontalStack_N	PPM	XD_PPM_TotalProjectCount (XD_PPM)
XD_ProgramActualVsPlanned_Bullet_N	FPA	XD_Actual_vs_Plan_Top_Programs (XD_FPA)
XD_ProjectHealthByRegion_Top5_HorizontalStack_N	PPM	XD_PPM_RegionProjectHealthByBudget (XD_PPM)
XD_SpendingbyBO_Pie_S	PPM	XD_PPM_BudgetofBOProjects (XD_PPM)
XD_Program_Scorecard_P	PPM	XD_Financial_KPI (XD_Financial): Tab 4: Unhealthy Budget Risk
		XD_Program_KPI (XD_Program): Tab 3: % Healthy Projects
		XD_BusinessObjective_ProjectCount (XD_PPM): Tab 3: Projects aligned to Business Objectives
XD_Program_KPI_Trend_S	FPA	XD_FPA_ProjectActualvsPlan (XD_FPA)
		XD_Program_KPI (XD_Program): Tab 3: % Healthy Projects
		XD_Financial_KPI (XD_Financial): Tab 4: Unhealthy Budget Risk
XD_Program_Metadata_N	PPM and FPA	XD_BusinessObjective_ProjectCount (XD_PPM) Tab 1: Total Project Count Tab 3: % Project Aligned to Business Objectives
		XD_Summary_ProjectActualCost (XD_FPA)
		XD_Summary_ProjectPlannedCost (XD_FPA) XD_FPA_ProjectActualvsPlan (XD_FPA)

## Service Components

<b>Xcelsius Component</b>	<b>Default Data Source</b>	<b>Associated Webi Report (and BOE InfoView Folder)</b>
XD_MonitoredAvailability_Pie_S	BSM	XD_BSM_Monitored_Availability (XD_BSM)
XD_SLABreached_Vertical_S	DC	XD_DC_AvailabilitySLABreachCount_AvailabilitySLATotalCount (XD_DC): Tab 1: Breached SLA Count Tab 2: Total SLA Count
XD_SLAINcidentResponseTime_Vertical_S	DC	XD_DC_IncidentResponseTime (XD_DC): Tab 1: Achieved SLA Count Tab 2: Total SLA Count
XD_ServiceActualVsPlanned_Bullet_N	FPA	XD_Actual_vs_Plan_Top_Services (XD_FPA)
XD_Service_Scorecard_P	BSM and DC	XD_Service_KPI (XD_Service): BSM Tab 1: Service Avail % BSM Tab 2: Service Response Time % DC Tab 3: % SLA Avail Breached DC Tab 4: % SLA Response Time Achieve
XD_Service_KPI_Trend_S	BSM and DC	XD_Service_KPI (XD_Service): BSM Tab 1: Service Avail % BSM Tab 2: Service Response Time % DC Tab 3: % SLA Avail Breached DC Tab 4: % SLA Response Time Achieve
XD_Service_Metadata_N	BSM and DC	XD_Service_Metadata (XD_Service)



## Summary Components

<b>Xcelsius Component</b>	<b>Default Data Source</b>	<b>Associated Webi Report (and BOE InfoView Folder)</b>
XD_ActualVsPlannedCost_Vertical_S	FPA	XD_FPA_ActualCost (XD_FPA)
		XD_FPA_PlannedCost (XD_FPA)
XD_DiscVsNonDiscCost_Pie_S	FPA	XD_FPA_Discretionary (XD_FPA)
		XD_FPA_Non_Discretionary (XD_FPA)
XD_CapexVsOpexCost_Pie_S	FPA	XD_FPA_Opex (XD_FPA)
		XD_FPA_Capex (XD_FPA)
XD_ProjActualVsPlannedCost_Vertical_S	FPA	XD_Summary_ProjectActualCost (XD_FPA)
		XD_Summary_ProjectPlannedCost (XD_FPA)
XD_ServicePerformanceAnalysis_Sparkline_N	FPA	XD_FPA_BusinessServiceActualCost (XD_FPA)
		XD_FPA_BusinessServicePlannedCost (XD_FPA)
	DC	XD_DC_%SLAAchieved (XD_DC)
	BSM	XD_BSM_%SLABreached (XD_BSM)
XD_ServiceLevelAchievementOvertime_StackedColumn_S	BSM	XD_BSM_SLACountsCategorization (XD_BSM)
XD_Summary_Metadata_N	FPA, PPM, BSM, and DC	N/A

## Working with Xcelsius Components

To make sure you open and save files in the correct location for Executive Scorecard to read, follow these instructions when you work with BusinessObjects Enterprise Xcelsius components.

1. From the Windows **Start** menu, click **Programs > Xcelsius**.
2. From the File menu in Xcelsius, select **Open from Platform**.
3. Log in to BusinessObjects Enterprise.
4. In the Open dialog box, expand the **XD\_Xcelsius\_Source** folder.
5. Click the component that you want to edit, and click **Open**.
6. Click the **Info** tab in the component spreadsheet. In the Connection Info table, type the Antivia URL. This URL will have the same server name and port number as the Executive Scorecard application.  
For example: `http://xd1.secure.hp.com:8080`
7. If necessary, open the Object Browser pane. From the View menu, select **Object Browser**.
8. In the Object Browser pane, select **Antivia Connect 1**. Xcelsius displays the properties for Antivia Connect 1 in the Properties pane on the right side of the window.
9. In the Properties pane, click **Check URL** to make sure there are no errors. Xcelsius will not display any messages if the check is successful.
10. In the **Design time connection** area, type the user name and password that you used to log in to BusinessObjects Enterprise, and then click **Connect**. The Design time connection changes from Design time connection: Not connected to Design time connection: Connected.
11. Make the desired changes.
12. Save a .swf file for the Executive Scorecard application, and then save the source file:
  - a. From the Xcelsius File menu, click **Export > SAP BusinessObjects Platform**.
  - b. In the Save As dialog box, navigate to the .swf file that you want to overwrite. Select the file and click **Save**. Xcelsius exports a .swf file and saves it in place of the existing version of the component.
  - c. From the Xcelsius File menu, select **Save to Platform**.
  - d. In the Save As dialog box, navigate to the location where you want to save the source .xlf file and click **Save**.
13. Log in to the Executive Scorecard application, and click **Admin**.
14. Click **Download BOE components to Tomcat server**. Executive Scorecard downloads to the Tomcat application the component that you exported to the BusinessObjects Enterprise repository.

## BOE Xcelsius Component Spreadsheets

The BusinessObjects Enterprise Xcelsius components use embedded Microsoft Excel spreadsheets to provide the data and display properties for the component. The spreadsheets have four tabs:

- **Info:** The Info tab contains general document properties, help, and Antivia XWIS connection information.
- **Display:** The Metric, Metadata, or KPI Display tab contains component display properties such as the title text and alert colors that display on the component. For information about the display tab for each component type, see [Working with Xcelsius Component Display Properties on page 20](#).
- **Connection:** The Connection tab contains the data model for the component. It contains raw source data and control values. For information about the Connection tab for each component type, see [Working with Xcelsius Component Data Models on page 36](#).
- **Reference:** The Reference tab contains hex values for the colors that are available to use for the components.

## Working with Xcelsius Component Display Properties

Display properties such as the title text, alert colors, maximum and minimum ranges, are set in a display tab in each BusinessObjects Enterprise Xcelsius component. You can use the Metric, Metadata, or KPI Display tab in the embedded Xcelsius spreadsheet to change display properties such as component titles and the colors that are used as indicators. This section describes the Metric, Metadata, or KPI Display tab for each type of component.

- [Metadata Component Display Properties on page 21](#)
- [Pie Chart Component Metric Display Properties on page 23](#)
- [Vertical Progress Bar Component Metrics Display Properties on page 25](#)
- [Horizontal Bullet Chart and Scorecard Component Metric Display Properties on page 27](#)
- [Horizontal Stacked Bar Component Metric Display Properties on page 29](#)
- [Spark Line Component Metric Display Properties on page 30](#)
- [KPI Trend Component Metric Display Properties on page 32](#)

## Metadata Component Display Properties

On the Metadata Display tab for the metadata components you can customize the display properties for the component.

### Example

The following example shows the Metric Display tab for a metadata component. The Metadata Component Display in Executive Scorecard graphic indicates which component metric display properties correspond to each setting in the Metadata Display tab.

### Metadata Component Metric Display Tab

1	<b>Period Displayed</b>	Display period: (Unknown)
2	<b>Date of FPA Refresh</b>	FPA: (Sample Data)
3	<b>Date of PPM Refresh</b>	PPM: (Sample Data)
	<b>Dashboard Name</b>	Financial Dashboard
4	<b>Notes</b>	The Financial Dashboard displays an overview of costs across multiple vectors.

### Metadata Component Display in Executive Scorecard

	<b>Financial Dashboard</b>	3
	<b>Data Refreshed</b>	
	FPA: 07-Jun-2010 12:35:35	2
	PPM: 07-Jun-2010 12:36:31	
1	Display period: FY2010	
	<b>Comments</b>	
	The Financial Dashboard displays an overview of costs across multiple vectors.	4

The table below provides a description of the numbered items.

Item	Description
1	The display period shows the period for the data that the components display on the page. The value in this column is calculated from another cell in the spreadsheet and should not be edited.
2	The date of refresh shows the date that the last refresh report for that data source was refreshed last. The values in these fields are calculated from other cells in the spreadsheet and should not be edited.
3	The dashboard name is the title that the metadata component displays. You can edit this text.
4	The notes in this field show in the comments section of the metadata components. You can edit this text.

## Pie Chart Component Metric Display Properties

On the Metric Display tab for the pie chart components, you can customize the component title and colors for slices in the pie chart.

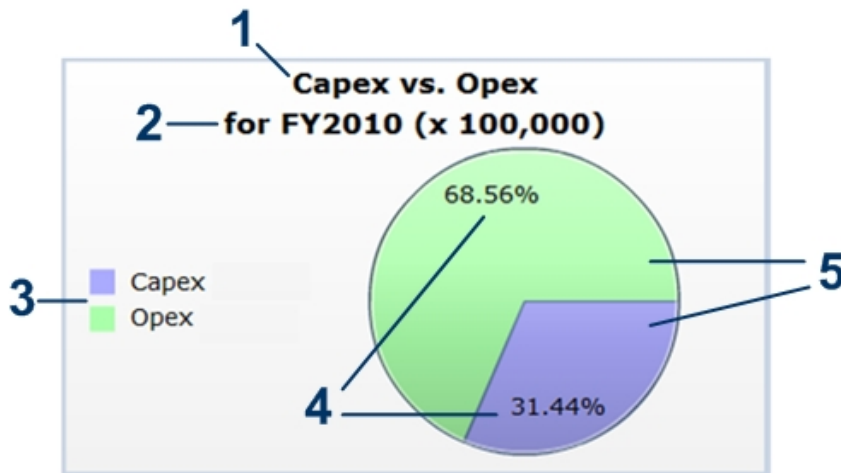
### Example

The following example shows the Metric Display tab for a pie chart component. The Pie Chart Component Display in Executive Scorecard graphic indicates which component metric display properties correspond to each setting in the Metric Display tab.

### Pie Chart Component Metric Display Tab

<b>1</b>	<b>Component Properties</b>		
	Title Text	Capex vs. Opex	
<b>2</b>	Subtitle Text	for FY2010	
	<b>Metrics</b>		<b>4</b>
	<b>Name</b>	<b>Value</b>	<b>Slice Color *</b>
<b>3</b>	Capex	-1	#AAAAFF
	Opex	100	#AAFFAA
			#FFAAAA
			#AAFFFF
			#FFFFAA
			#FFAAFF
			#FFFFFF
			#AAAAAA
			#CC44CC
			#44CC44

### Pie Chart Component Display in Executive Scorecard



The table below provides a description of the numbered items.

Item	Description
1	The title text appears at the top of the component. You can edit this field in the spreadsheet.

Item	Description
2	The subtitle text shows the period for the data. The value in this field comes from the Selected section on the Connection tab. A formula on the Connection tab determines how many digits appear in the parenthesis, and a formula in the subtitle field determines what to show.
3	The metrics list comes from the Name column in the Selected section on the Connection tab. Do not edit these values.
4	The metric values come from the Value column in the Selected section on the Connection tab. Do not edit these values.
5	This column designates the color for each slice in the pie chart. You can edit these values. Refer to the Reference tab to find the hex values for the possible colors.



## Vertical Progress Bar Component Metrics Display Properties

On the Metric Display tab for the vertical progress bar components you can customize the display properties for the component. The default values for the vertical progress bar components that are delivered with Executive Scorecard use the settings that are typical for the key performance indicator (KPI).

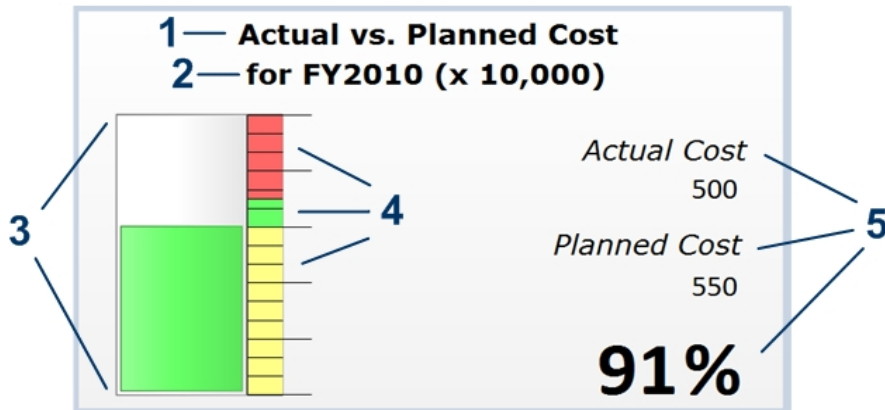
### Example

The following example shows the Metric Display tab for a vertical progress bar component. The Vertical Progress Bar Component Display in Executive Scorecard graphic indicates which component metric display properties correspond to each setting in the Metric Display tab.

### Vertical Progress Bar Component Metric Display Tab

<b>1</b>	<b>Component Properties</b>	
	Title Text	Actual vs. Planned Cost
<b>2</b>	Subtitle Text	for FY2010
<b>3</b>	Vertical Minimum	0
	Vertical Maximum	150
<b>4</b>	Alert Color (Good)*	#66FF66
	Alert Color (Warning)*	#FFFF88
	Alert Color (Bad)*	#FF6666
	<b>Metrics</b>	
<b>5</b>	Measure 1	-1
	Measure 2	100
	Calculation	-1

### Vertical Progress Bar Component Display in Executive Scorecard



The table below provides a description of the numbered items.

Item	Description
1	The title text appears at the top of the component.

Item	Description
2	The subtitle text shows the period for the data. The value in this field comes from the Selected section on the Connection tab. A formula on the Connection tab determines how many digits appear in the parenthesis, and a formula in the subtitle field determines what to show.
3	The vertical maximum and minimum indicate the top and bottom values for the progress bar.
4	You can designate the colors to use to represent good, warning, and bad. Refer to the Reference tab in the spreadsheet for hex values for the colors.
5	The metrics come from the Connection tab. Do not edit these values.

# Horizontal Bullet Chart and Scorecard Component Metric Display Properties

On the Metric Display tab for the horizontal bullet chart and scorecard components you can customize the component title and the colors that are used in the bullet chart.

## Example

The following example shows the Metric Display tab for a horizontal bullet chart component. The Horizontal Bullet Chart Component Display in Executive Scorecard graphic indicates which component metric display properties correspond to each setting in the Metric Display tab. The Metric Display tab for the scorecard components is identical to the display tab for the horizontal bullet chart components.

### Horizontal Bullet Chart Component Metric Display Tab

<b>1</b>	<b>Component Properties</b>	
	Title Text	Actual vs. Planned Cost
<b>2</b>	Subtitle Text	Top 5 Programs
<b>3</b>	Gradient Color (Low End) *	#9999CC
	Gradient Color (High End) *	#CCCCFF
	Alert Color (Good) *	#66CC66
<b>4</b>	Alert Color (Neutral) *	#FFFF66
	Alert Color (Bad) *	#CC6666
<b>5</b>	Goal Marker Color *	#000000

### Horizontal Bullet Chart Component Display in Executive Scorecard



The table below provides a description of the numbered items.

Item	Description
1	The title text appears at the top of the component.
2	The subtitle text appears below the title.

Item	Description
3	The low and high end gradient colors designate the color for the background gradient, which looks gray in the Horizontal Bullet Chart Component Display in Executive Scorecard graphic.
4	The alert colors specify the color of the horizontal line that represents the actual cost. By default, the neutral color is not implemented.
5	The goal marker color specifies the color of the vertical line that represents the planned cost.

## Horizontal Stacked Bar Component Metric Display Properties

On the Metric Display tab for the horizontal stacked bar components you can customize the display properties for the component. The default values for the horizontal stacked bar components that are delivered with Executive Scorecard use the settings that are typical for the key performance indicator (KPI).

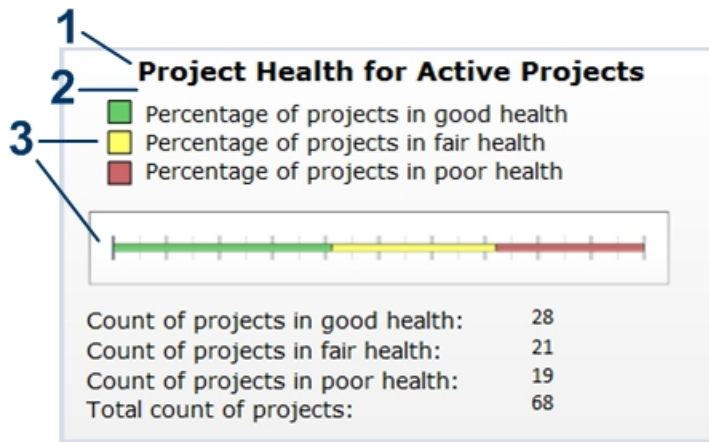
### Example

The following example shows the Metric Display tab for a Horizontal Stacked Bar component. The Horizontal Stacked Bar Component Display in Executive Scorecard graphic indicates which Component Metric Display properties correspond to each setting in the Metric Display tab.

### Horizontal Stacked Bar Component Metric Display Tab

1	<b>Component Properties</b>	
2	Title Text	Project Health for Active Projects
	Subtitle Text	
3	Alert Color (Good) *	#66CC66
	Alert Color (Neutral) *	#FFFF66
	Alert Color (Bad) *	#CC6666

### Horizontal Stacked Bar Component Display in Executive Scorecard



The table below provides a description of the numbered items.

Item	Description
1	The title text appears at the top of the component.
2	The subtitle text appears below the title.
3	You can designate the colors to use to represent good, neutral, and bad. Refer to the Reference tab in the spreadsheet for hex values for the colors.

## Spark Line Component Metric Display Properties

On the Metric Display tab for the spark line components you can customize the component title and the colors that are used in the bullet chart.

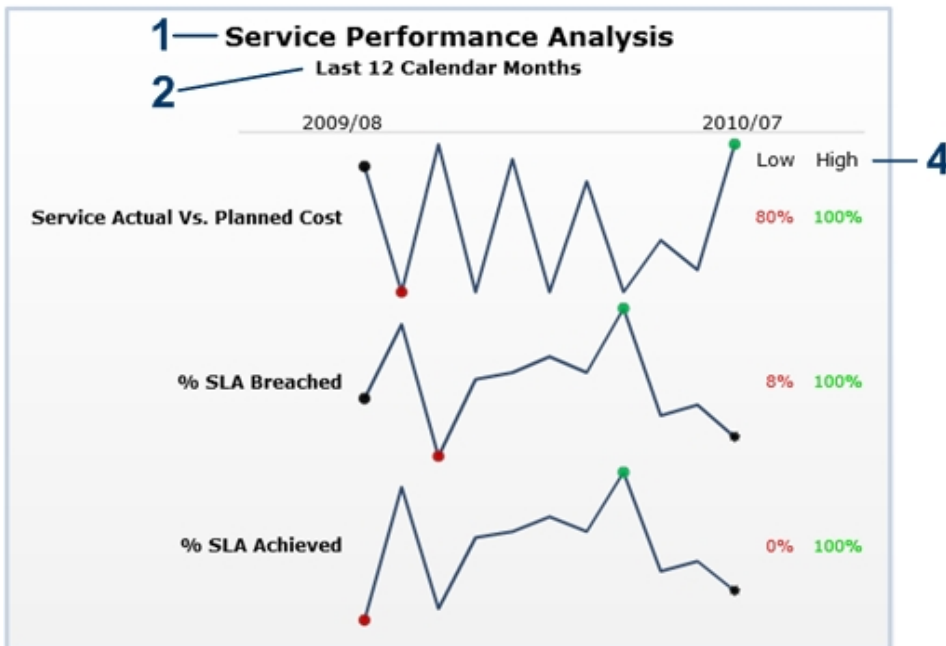
### Example

The following example shows the Metric Display tab for a spark line component. The Spark Line Component Display in Executive Scorecard graphic indicates which component metric display properties correspond to each setting in the Metric Display tab.

### Spark Line Component Metric Display Tab

1	Title	Service Performance Analysis
2	Subtitle	Last 12 Calendar Months
3	Label5	End Value
	Label1	Start Value
4	Label6	Low
	Label7	High

### Spark Line Display in Executive Scorecard



The table below provides a description of the numbered items.

Item	Description
1	The title text appears at the top of the component.
2	The subtitle text appears below the title.

Item	Description
3	By default, these labels are not used.
4	These are the labels for the columns on the right side of the component.

## KPI Trend Component Metric Display Properties

On the KPI Display tab for the KPI trend components you can customize the data options and colors that are used in the charts.

### **Example**

The following example shows the KPI Display tab for a KPI trend component. The KPI Trend Component Display in Executive Scorecard graphic indicates which component metric display properties correspond to each setting in the KPI Display tab.



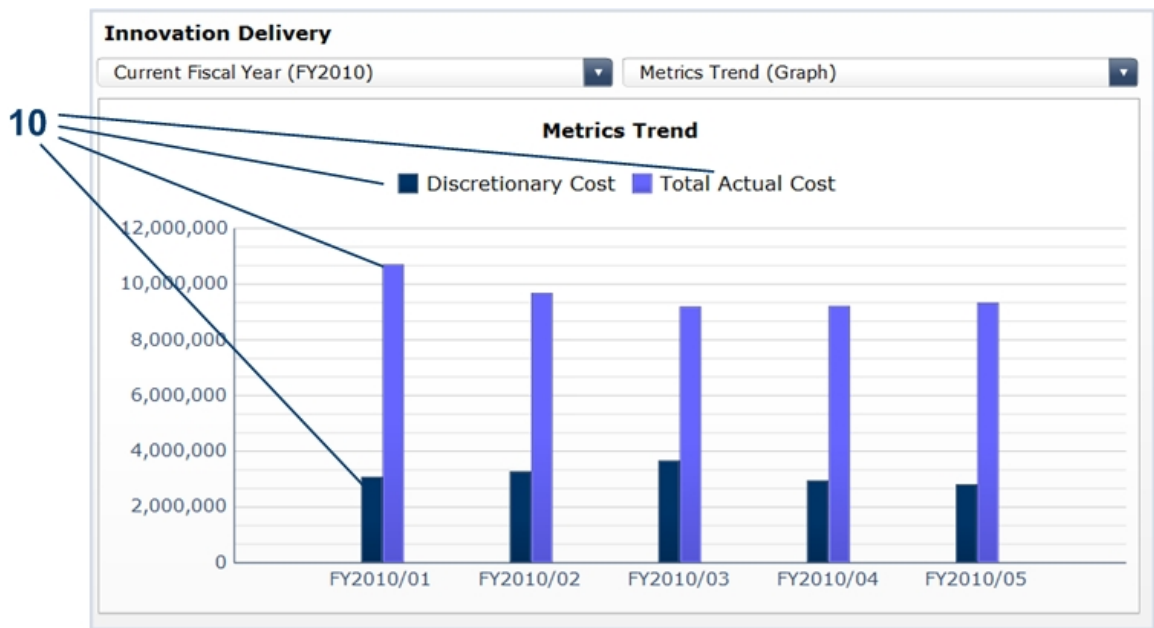
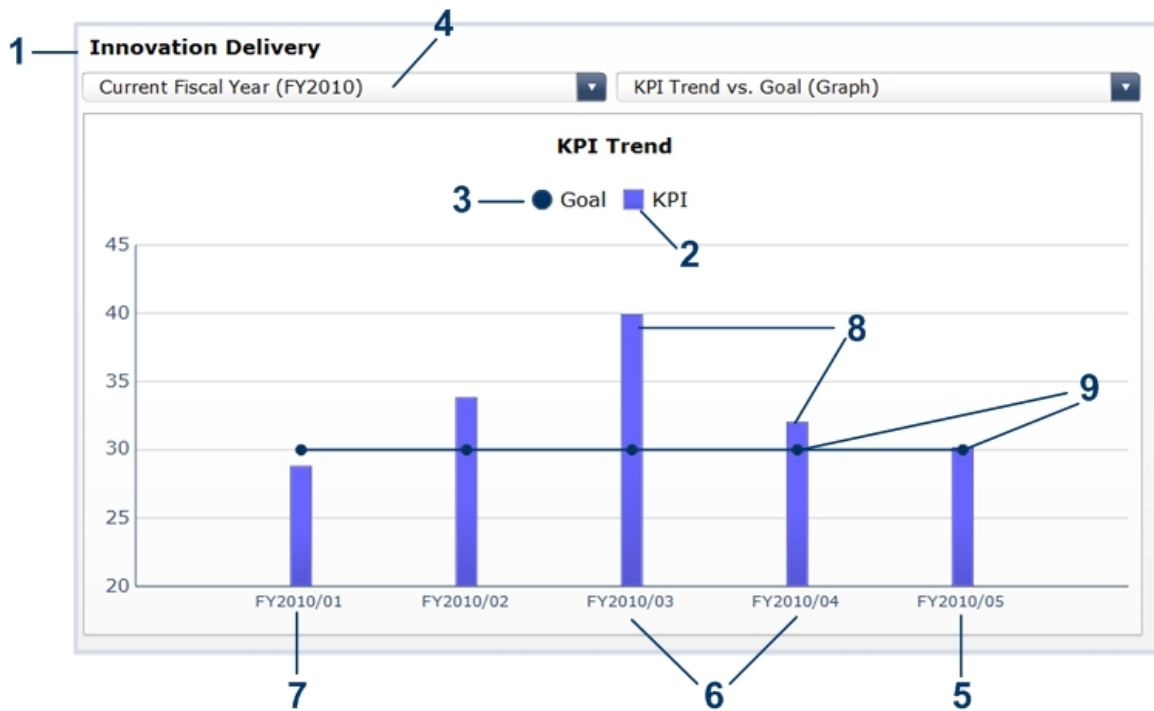
KPI Trend Component Metric Display Tab

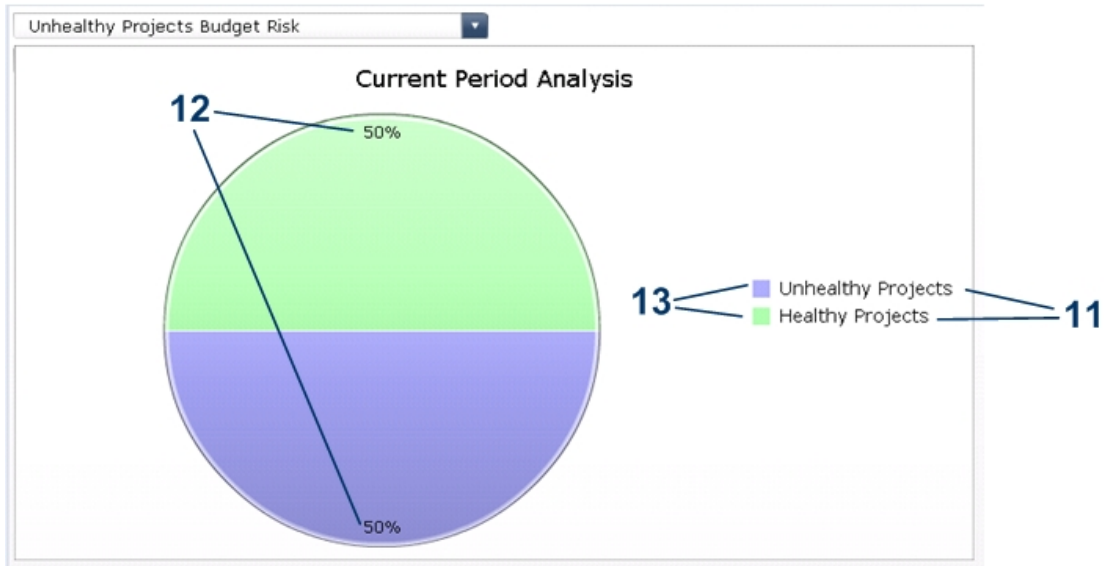
Component Properties		
1	Title Text	Unhealthy Projects Budget Risk
2	KPI Color *	#6666FF
3	Goal Color *	#003366
Data Options		
4	Name	Period Parameter **
	Current Fiscal Year (2010)	FM-00
	Last Fiscal Year (2009)	FM-11
	2 Fiscal Years Ago	FM-23
		Data Pts. ***
		11
		12
		12

Chart Data						
	Period	KPI Trend	KPI Trend ^	Goal	Discretionary Cost	Total Actual Cost
1	2010/07	0	0	0	0	0
2	2010/06	0	0	0	0	0
3	2010/05	0	0	0	0	0
4	2010/04	0	0	0	0	0
5	2010/03	0	0	0	0	0
6	2010/02	0	0	0	0	0
7	2010/01	0	0	0	0	0
8						
9						
10						
11						
12						

Pie Data		
Name	Value	Slice Color *
Unhealthy Projects	50	#AAAAFF
Healthy Projects	50	#AAFFAA
		#FFAAAA
		#AAFFFF
		#FFFFAA
		#FFAAFF
		#FFFFFF
		#AAAAAA
		#CC44CC
		#44CC44

KPI Trend Display in Executive Scorecard





The table below provides a description of the numbered items.

Item	Description
1	The title text is passed to the component by the application. The title is received from the KPI that is selected in the in the Scorecard component. Do not edit this value.
2	The color that represents the KPI in the bar chart. Refer to the Reference tab for the available hex color codes.
3	The color that represents the goal in the bar chart. Refer to the Reference tab for the available hex color codes.
4	The Name column in the Data Options table lists the options that become available in the drop-down list.
5	The row in the Connection tab that corresponds to the period you typed in the Name column. Enter the first value from the Lookup column for the last period in the series. You can also use a variable to find the end of the fiscal year.
6	The Data Points column provides the start month and the number of months back to show (up to 12 data points).
7	The periods that the chart will display. Do not edit these values.
8	The KPI values for each period. These values come from the Connection tab. Do not edit them. So that they appear red in the chart, KPI trend values that do not meet goal tolerance show as negative values in the KPI Trend column on the right.
9	The goal values come from the Connection tab. Do not edit these values.
10	The metrics that show in the Metrics Trend bar chart. In this example, Discretionary Cost and Total Actual Cost are shown. The metric values come from the Connection tab. Do not edit these values.
11	The metrics that are shown come from the Connection tab. Do not edit these values.
12	The metric values come from the Connection tab. Do not edit these values.
13	This column designates the color for each slice in the pie chart. You can edit these values. Refer to the Reference tab to find the hex values for the possible colors.

## Working with Xcelsius Component Data Models

The data model for each component is contained on the Connection tab in each component spreadsheet. The Connection tab contains raw source data and control values. This chapter provides information about the data model for each type of component.

- [Metadata Component Data Model on page 37](#)
- [Pie Chart Component Data Model on page 38](#)
- [Vertical Progress Bar Component Data Model on page 39](#)
- [Horizontal Stacked Bar Component Data Model on page 41](#)
- [Scorecard Component Data Model on page 44](#)
- [KPI Trend Component Data Model on page 45](#)

## Metadata Component Data Model

The data model for the metadata components contains the refresh dates for each data source.

### Example

1	Display Period	(Unknown)
	FPA Refresh Date	(Sample Data)
2	DC Refresh Date	(Sample Data)
	PPM Refresh Date	(Sample Data)
	BSM Refresh Date	(Sample Data)

The table below provides a description of the numbered items.

Item	Description
1	The display period shows the period for the data that the components display on the page.
2	These are the default data sources that are configured for Executive Scorecard.

## Pie Chart Component Data Model

The data model for the pie chart components has three main areas that collect data.

### Example

Parameter	Calendar Period			Fiscal Period				
FY-00	Lookup *	Calendar Period	Capex	Opex	Lookup *	Fiscal Period	Capex	Opex
	Y-00	2010	0	100	FY-00	FY2010	-1	100
	Y-01	2009	0	100	FY-01	FY2009	0	100
	Y-02				FY-02			
	Q-00	2010/Q2	0	100	FQ-00	FY2010/Q2	0	100
	Q-01	2010/Q1	0	100	FQ-01	FY2010/Q1	0	100
	Q-02	2009/Q4	0	100	FQ-02	FY2009/Q4	0	100
	Q-03	2009/Q3	0	100	FQ-03	FY2009/Q3	0	100
	Q-04	2009/Q2	0	100	FQ-04	FY2009/Q2	0	100
	Q-05	2009/Q1	0	100	FQ-05	FY2009/Q1	0	100
	Q-06				FQ-06			
	Q-07				FQ-07			
	Q-08				FQ-08			
	Q-09				FQ-09			
	Q-10				FQ-10			
	Q-11				FQ-11			
	M-00	2010/07	0	100	FM-00	FY2010/07	0	100
	M-01	2010/06	0	100	FM-01	FY2010/06	0	100
	M-02	2010/05	0	100	FM-02	FY2010/05	0	100

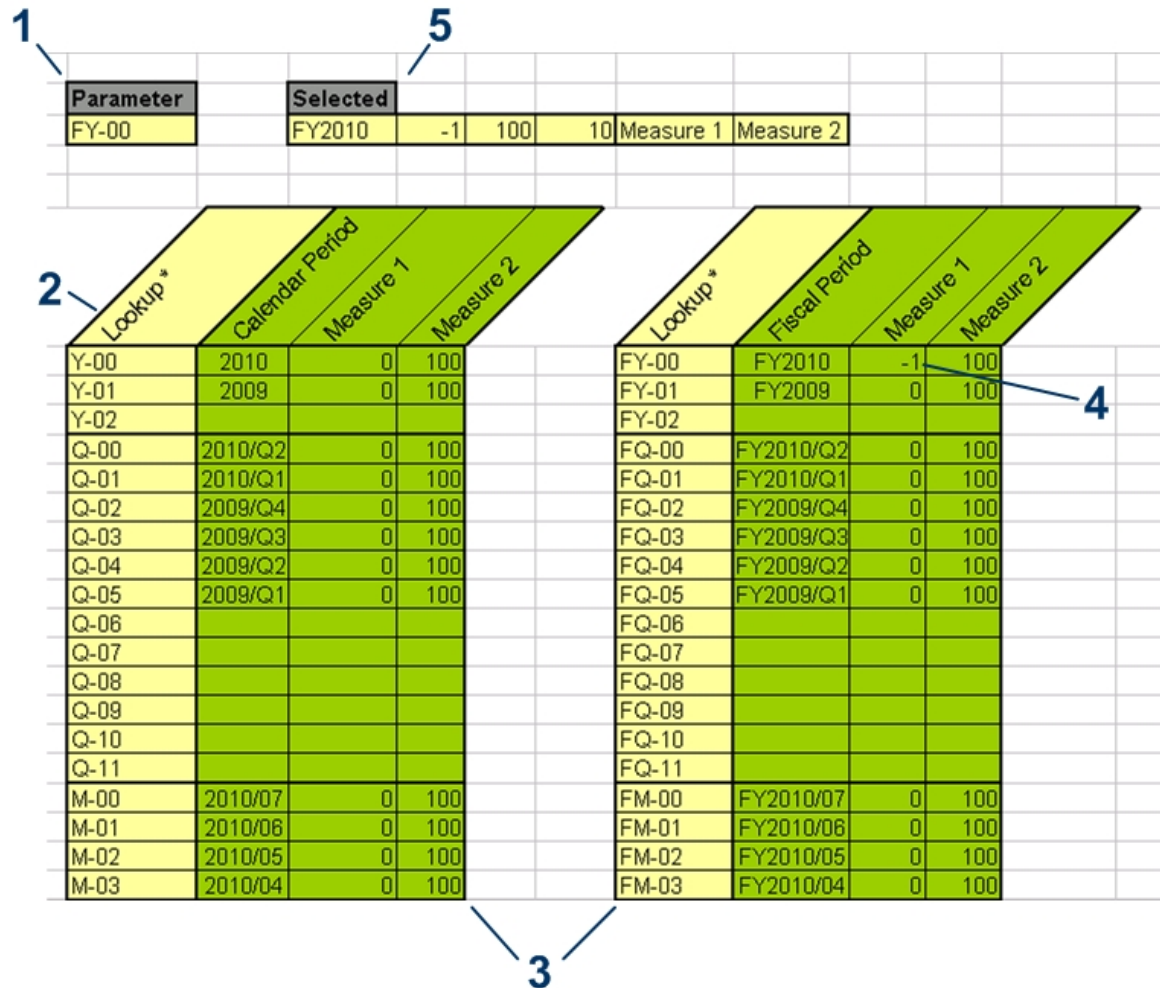
The table below provides a description of the numbered items.

Item	Description
1	The Parameter shows the period for which the component displays data. The value in this field corresponds to a value in the Lookup column and indicates which row of data to display in the component. The default setting for the pie chart components is the current year.
2	The Lookup column lists the periods that are available to display data for. By default, this column shows the current year and last 2 years, the current quarter and last 11 quarters, and the current month and last 35 months. The data moves backwards from the current day. For example, FY-01 is last fiscal year, and FM-03 is 3 fiscal months ago.
3	The Selected section shows the data from the fiscal period columns that is returned by the Parameter value. It is a staging area for the source data that the component displays. Do not make changes to the values in this section.
4	The set of columns on the left display data for calendar periods. The set of columns on the right display data for fiscal periods. By default, the pie chart components use the fiscal period columns.
5	The -1 value enables the component to finish loading data before Executive Scorecard displays the component. When the value is -1, the component displays a <b>Connecting</b> message in Executive Scorecard. Once the current data replaces the -1, the component becomes visible and shows current data. If you change -1 to a different value, Executive Scorecard displays the incomplete component until the component finishes loading.
6	You can use the extra columns to populate additional measures.

## Vertical Progress Bar Component Data Model

The data model for the vertical progress bar components is similar to the data model for the pie chart components.

### Example



The table below provides a description of the numbered items.

Item	Description
1	The Parameter shows the period for which the component displays data. The value in this field corresponds to a value in the Lookup column and indicates which row of data to display in the component. The default setting for vertical progress bar components is the current year.
2	The Lookup column lists the periods that are available to display data for. By default, this column shows the current year and last 2 years, the current quarter and last 11 quarters, and the current month and last 35 months. The data moves backwards from the current day. For example, FY-01 is last fiscal year, and FM-03 is 3 fiscal months ago.

Item	Description
3	The set of columns on the left display data for calendar periods. The set of columns on the right display data for fiscal periods. By default, the vertical progress bar components use the fiscal period columns.
4	The -1 value enables the component to finish loading data before Executive Scorecard displays the component. When the value is -1, the component displays a <b>Connecting</b> message in Executive Scorecard. Once the current data replaces the -1, the component becomes visible and shows current data. If you change -1 to a different value, Executive Scorecard displays the incomplete component until the component finishes loading.
5	The Selected section shows the data from the fiscal period columns that is returned by the parameter value. It is a staging area for the source data that the component displays. Do not make changes to the values in this section.



## Horizontal Stacked Bar Component Data Model

The data model for the horizontal stacked bar components is simple; most calculations for this type of component are completed in the Web Intelligence report.

### Example

Project Count	Count of Projects in Green	Count of Projects in Yellow	Count of Projects in Red	Percentage of Projects in Green	Percentage of Projects in Yellow	Percentage of Projects in Red	Visible
0	2	2	1	0.4	0.4	0.2	1

The table below provides a description of the numbered items.

Item	Description
1	The total number of projects.
2	The number of projects that are good (green), neutral (yellow), and bad (red).
3	The percentage of projects that are good (green), neutral (yellow), and bad (red).
4	Not implemented out-of-box.

## Horizontal Bullet Chart Component Data Model

On the Connection tab for the horizontal bullet chart components you can customize the tolerance value that indicates whether the actual cost is in alignment with planned spending.

### Example

Programs								
Name	Actual	Plan	Tolerance *	Score Calc	Visible	PM Color	Performance	Comparative
Program 1	0	100	10%	-1	1	#CC6666	0	100
Program 2	0	100	10%	-1	1	#CC6666	0	100
Program 3	0	100	10%	-1	1	#CC6666	0	100
Program 4	0	100	10%	-1	1	#CC6666	0	100
Program 5	0	100	10%	-1	1	#CC6666	0	100
Scale		0	0					

The table below provides a description of the numbered items.

Item	Description
1	Placeholders for the top five programs with the largest allocated planned cost amounts for the period. The data in these columns comes from your data source. You can manually enter the values, if necessary.
2	The tolerance is the percentage above and below the goal (planned cost) that the actual amount can fall between and still be in alignment with planned spending. You can edit the values in this column.
3	The score calculation determines the alert color for the actual cost line. 1= green, -1 = red, and 0 = yellow. The values in this column are calculated from other cells in the spreadsheet.
4	Currently not used. The values in this column are calculated from other cells in the spreadsheet.
5	This column corresponds to the score calculation and lists the hex values for the color of the actual cost line. The values in this column are calculated from other cells in the spreadsheet.
6	The performance column shows the actual cost rounded to two decimal places. The values in this column are calculated from other cells in the spreadsheet.
7	The comparative column shows the planned cost rounded to two decimal places. The values in this column are calculated from other cells in the spreadsheet.
8	The scale determines the values at which the background gradient color changes. The values in this column are calculated from other cells in the spreadsheet.

## Spark Line Component Data Model

This section provides information about the data model for the scorecard components.

### Example

Calendar Period	Service Actual Vs. Planned Cost	% SLA Monitored Breached	% SLA Reported Achieved	% Successful Changes
2009/08	0.97	0.44	0.0044	0.0044
2009/09	0.8	0.9	0.9	0.9
2009/10	1	0.08	0.08	0.08
2009/11	0.8	0.56	0.56	0.56
2009/12	0.98	0.6	0.6	0.6
2010/01	0.8	0.7	0.7	0.7
2010/02	0.95	0.6	0.6	0.6
2010/03	0.8	1	1	1
2010/04	0.87	0.3333	0.3333	0.3333
2010/05	0.83	0.4	0.4	0.4
2010/06	1	0.2	0.2	0.2
2010/07	0.83	0.1	0.1	0.1

Lookup*	Calendar Period	Actual Cost	Planned Cost	%SLA Breached	%SLA Achieved	%Successful Changes
M-00	2010/07	0	100	10	10	10
M-01	2010/06	100	100	20	20	20
M-02	2010/05	83	100	40	40	40
M-03	2010/04	87	100	33.33	33.33	33.33
M-04	2010/03	80	100	100	100	100
M-05	2010/02	95	100	60	60	60
M-06	2010/01	80	100	70	70	70
M-07	2009/12	98	100	60	60	60
M-08	2009/11	80	100	56	56	56
M-09	2009/10	100	100	8	8	8
M-10	2009/09	80	100	90	90	90
M-11	2009/08	97	100	44	0.44	0.44

The table below provides a description of the numbered items.

Item	Description
1	The calendar periods to show on the spark line component.
2	The values for the metrics that the component displays.
3	The Lookup column lists the periods that are available to display data for.
4	The values for calendar period to show on the spark line component.
5	The actual cost and planned cost values that are used to calculate the actual versus planned cost.
6	The values for the KPIs that the scorecard component displays.

## Scorecard Component Data Model

This section provides information about the data model for the scorecard components.

### Example

KPIs	1	2	3	4	5	6	7	8	9	10	11				12	13
KPI Name	Value	Goal	Status	Bullet	Previous	Goal	Tolerance**	Score Calc	Trend Calc	Trend Color	Scale 1	Scale 2	Scale 3	Scale 4	Visible	PM Color
Innovation Delivery	21	>= 30			25	30	>=	-1	-1	#CC6666	0	30	100	100	1	#CC6666
Financial Control	95	95-105			85	100	5	1	1	#66CC66	0	95	105	105	1	#66CC66
IT POR vs. Total Revenue	16.6669612	<= 2.5			58.7902938	2.5	<=	-1	-1	#CC6666	0	0	2.5	100	1	#CC6666
Business Service Cost Reduction	-68.4358591	<= 0			0	0	<=	1	-1	#66CC66	-50	0	0	50	1	#66CC66
Unhealthy Projects Budget Risk	10	<= 20			10	20	<=	1	0	#66CC66	0	0	20	100	1	#66CC66
								1	0	#66CC66	0	0	0	100	0	#66CC66
								1	0	#66CC66	0	0	0	100	0	#66CC66
								1	0	#66CC66	0	0	0	100	0	#66CC66
								1	0	#66CC66	0	0	0	100	0	#66CC66
Selected																
Parameter																

The table below provides a description of the numbered items.

Item	Description
1	The list of KPIs for the component.
2	The value of the KPI.
3	The goal for the KPI.
4	The status and bullet columns must remain empty and in the order shown above. These columns display icons in the scorecard component.
5	The value for that KPI in the pervious period.
6	The planned cost for the KPI. You can edit the values in this column.
7	The tolerance for the actual cost. This value indicates the range that the actual cost can fall above or below the planned cost and still be considered on target. You can edit the values in this column.
8	Describes wether the actual cost meets the goal.
9	The calculation of the comparison between the current value of the KPI versus the value of the KPI for the previous period.
10	Determines the color of the trend icons.
11	The scale for the background colors in the bullet charts.
12	Indicates whether the scorecard component displays the KPI.
13	This column indicates the color of the performance marker or actual cost line in the bullet chart.

## KPI Trend Component Data Model

This section provides information about the data model for the KPI trend components.

### Example

Selection						
Index	Period	KPI Trend	Goal	Metric 1	Metric 2	Score
1	2010/07	0	0	0	0	1
2	2010/06	0	0	0	0	1
3	2010/05	0	0	0	0	1
4	2010/04	0	0	0	0	1
5	2010/03	0	0	0	0	1
6	2010/02	0	0	0	0	1
7	2010/01	0	0	0	0	1
8	2009/12	0	0	0	0	1
9	2009/11	0	0	0	0	1
10	2009/10	0	0	0	0	1
11	2009/09	0	0	0	0	1
12	2009/08	0	0	0	0	1

Parameters		
2	Period	FM-00
3	Data Points	7
4	KPI	Unhealthy Projects Budget Risk
5	Tolerance	10
6	Fiscal Offset	12

Dynamic Fields		
7	Metric 1	0
7	Metric 2	0
8	KPI Trend vs. Goal	1
8	Metrics Trend (Graph)	2
8	All Data (Table)	3
9	Show Pie?	1
10	Visibility	1
11	UIM Flag	0

The table below provides a description of the numbered items.

Item	Description
1	The Selection section is a staging area for the source data that the component displays. Do not make changes to the values in this section.
2	The period for which the component displays data. The value in this field corresponds to a value in the Lookup column and indicates which row of data to display in the component.
3	The number of periods back from the current period to show.
4	The KPI that is selected in the Scorecard component.

<b>Item</b>	<b>Description</b>
5	Not used out-of-box.
6	The current fiscal month. This value comes from the metadata report.
7	The metrics used in the KPI calculation.
8	The options and order of the options in the component drop-down.
9	Indicates if a pie chart will be used. If you add a pie chart or change the KPI, you must change the text in the formula for this cell as the KPI name is hard coded into the formula.
10	Not used out-of-box.
11	Indicates if the scorecard component is being used to determine the KPI.

	Lookup *	Fiscal Period	Innovation Delivery	Financial Control	IT POR vs. Total Revenue	Business Service Cost Reduction	Unhealthy Projects Budget Risk
<b>1</b>	<b>KPI Trends</b>	FY-00	2010	0.00	5000.00	0.02	23.48
		FY-01	2009	4150.00	4050.00	0.00	0.00
		FY-02				0.00	0.00
		FQ-00	2010/Q2	1000.00	1000.00	0.00	-52.15
		FQ-01	2010/Q1	2090.00	2090.00	0.00	39.33
		FQ-02	2009/Q4	1500.00	1500.00	0.00	87.50
		FQ-03	2009/Q3	800.00	800.00	0.00	-46.67
		FQ-04	2009/Q2	1500.00	1500.00	0.00	87.50
	FQ-05	2009/Q1	800.00	800.00	0.00	0.00	
	FQ-06				0.00	0.00	
<b>2</b>	<b>Goals</b>	FY-00	2010	30	100	2.5	0
		FY-01	2009	30	100	2.5	0
		FY-02	0	30	100	2.5	0
		FQ-00	2010/Q2	30	100	2.5	0
		FQ-01	2010/Q1	30	100	2.5	0
		FQ-02	2009/Q4	30	100	2.5	0
		FQ-03	2009/Q3	30	100	2.5	0
		FQ-04	2009/Q2	30	100	2.5	0
	FQ-05	2009/Q1	30	100	2.5	0	
	FQ-06	0	30	100	2.5	0	
	FQ-07	0	30	100	2.5	0	

	Lookup *	Fiscal Period	Innovation Delivery M1	Financial Control	IT Actual Cost	Business Service Actual Cost
<b>3</b>	<b>Metric 1</b>	FY-00	2010	5000.00	5000.00	5000.00
		FY-01	2009	4050.00	4050.00	4050.00
		FY-02				0.00
		FQ-00	2010/Q2	1000.00	1000.00	1000.00
		FQ-01	2010/Q1	2090.00	2090.00	2090.00
		FQ-02	2009/Q4	1500.00	1500.00	1500.00
		FQ-03	2009/Q3	800.00	800.00	800.00
		FQ-04	2009/Q2	1500.00	1500.00	1500.00
	FQ-05	2009/Q1	800.00	800.00	800.00	
	FQ-06				0.00	

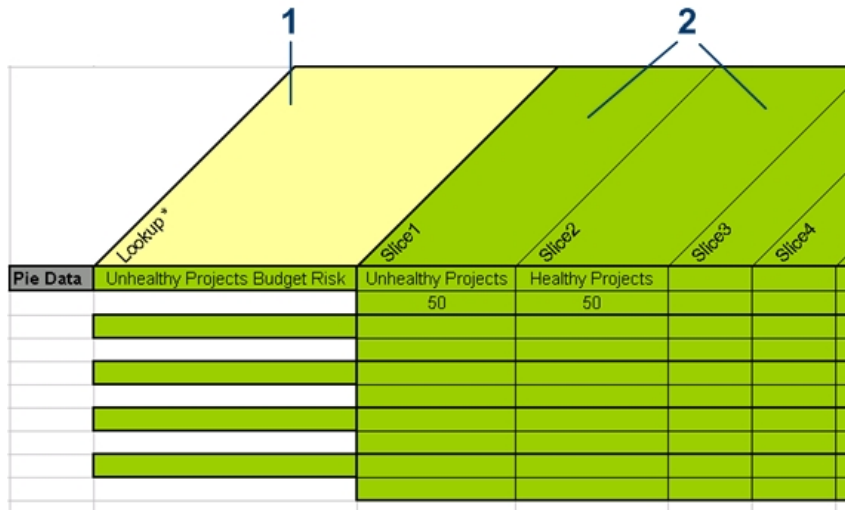
  

	Lookup *	Fiscal Period	Innovation Delivery	Financial Control	Company Revenue	Business Service Cost for Prior Month	
<b>4</b>	<b>Metric 2</b>	FY-00	2010	5000.00	5000.00	28315003.00	4050.00
		FY-01	2009	4050.00	4050.00	89706237.00	0.00
		FY-02					0.00
		FQ-00	2010/Q2	1000.00	1000.00	45000000.00	2090.00
		FQ-01	2010/Q1	2090.00	2090.00	48000000.00	1500.00
		FQ-02	2009/Q4	1500.00	1500.00	50000000.00	800.00
		FQ-03	2009/Q3	800.00	800.00	46000000.00	1500.00
		FQ-04	2009/Q2	1500.00	1500.00	40000000.00	800.00
	FQ-05	2009/Q1	800.00	800.00	48000000.00	0.00	
	FQ-06				50000000.00	0.00	

The table below provides a description of the numbered items.

Item	Description
1	This section contains the data for each KPI. These values come from other cells in the spreadsheet or the data source. Do not edit these values.
2	This section contains the goals for each KPI. You can edit the values in the white cells.

Item	Description
3	This section contains the data for metric 1 in the KPI. These values come from other cells in the spreadsheet or the data source. Do not edit these values.
4	This section contains the data for metric 2 in the KPI. Type the values for the Company Revenue metric manually. The value in each row is the revenue for the company for the corresponding period (listed in the Lookup column). The values for the other metrics come from other cells in the spreadsheet or the data source. Do not edit these values.



The table below provides a description of the numbered items.

Item	Description
1	This column contains the KPI. The data model is set up to hold five KPIs.
2	The slice columns contain the data for the metrics that make up the pie chart.



# Working with BOE Web Intelligence Reports

You can use BusinessObjects Enterprise (BOE) InfoView to change existing Web Intelligence (Webi) reports. Follow the recommendations in [Guidelines for Modifying Web Intelligence Reports on page 49](#) when you modify Webi reports.

## Working with Webis

To make sure you open and save files in the correct location for Executive Scorecard to read, follow these instructions when you work with Web Intelligence (Webi) reports.

1. From the Windows **Start** menu, select **Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects Enterprise Java InfoView**.
2. Log in to InfoView.
3. Click **Document List**.
4. Expand **Public Folders**.
5. View the report folders for Executive Scorecard. The names of the out-of-box folders are prefixed by **XD\_**. For information about which folder a report exists in, see [Xcelsius Component and Webi Reference on page 14](#).
6. Click the folder that contains the report that you want to modify. Right-click the Webi in the right pane and select **Modify**.
7. Make the desired changes, following the guidelines in [Guidelines for Modifying Web Intelligence Reports on page 49](#).
8. Save and close the Webi.

## Guidelines for Modifying Web Intelligence Reports

If you use the Antivia Xcelsius Web Intelligence Integration Suite (XWIS) application to push data to the BusinessObjects Enterprise Xcelsius components, follow these guidelines when you modify Web Intelligence (Webi) reports.

- XWIS does not read Webi customizations such as variables. It reads only the data provided by the base Webi query. To make sure XWIS can read the Webis, do not use Webi customizations.
- Do not use synchronized SQL Select statements; XWIS will not read them.
- Data does not sort if the sorting is applied in the Webi. You must set up sorting in the Report tab in the Antivia Table for each Xcelsius component.
- The key performance indicator (KPI) calculations are created in the universes, not in the Webi reports.

**Note:** XWIS does not upload data from Webis to the Xcelsius component data model. Therefore, although the data does get passed to the Xcelsius component .swf file, you cannot view the data by opening the source component in Xcelsius.

# Working with Universes and Views

You can use BusinessObjects Enterprise (BOE) Universe Designer to change and create universe files. When you modify the existing out-of-box universes, refer to the [Universe Reference Information on page 51](#) and [Date Handling on page 50](#) sections for important details about the universe files.

## Working with Universes

When you work with universe files, make sure to open the files from the BOE CMS database and then export the files back to the database after you make your changes.

To open universe files from your CMS database

1. From the Windows **Start** menu, click **Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > Designer**.
2. Log in to Universe Designer.
3. From the File menu in Designer, click **Open**.
4. In the Open dialog box, navigate to the **webi universes** folder for your CMS, select the universe you want to edit, and then click **Open**.

To export universe files to your CMS database

1. Save your universe changes.
2. From the File menu in Designer, select **Export**.
3. In the bottom pane of the Export Universe dialog box, select the universe.
4. Click **OK**.

## Date Handling

Since each data source has unique date or period dimensions, the Executive Scorecard requires the use of customized date dimensions to standardize the date handling. The standardized date dimensions are created using derived tables in the Financial Planning & Analysis (FPA) and Project and Portfolio Management (PPM) universes. The same date handling (SQL code) exists in the views for DecisionCenter (DC) and Business Service Management (BSM) data rather than in the DC and BSM universes.

This section provides details about the date handling for Executive Scorecard data:

- The date dimensions provide three years of data, which is 36 or 51 rows to BusinessObjects Enterprise Xcelsius. The Antivia Xcelsius Web Intelligence Integration Suite (XWIS) requires a set number of cells whether data is present or not.
  - The 51 rows is for data that originates in FPA: 3 year values, 12 quarter values, and 36 month values.
  - The 36 rows are month values for data that originates in PPM, DC, or BSM.
- A standalone date dimension produces the fixed date cells. This standalone dimension is merged with a date dimension that is joined to the source date data.

- A union query in the Web Intelligence (Webi) reports combines the data from the standalone derived table with the date dimension that is joined to the source data.
- Dates are determined based on the latest date, usually the current day.
- A sort key is provided so that data can be sorted in Xcelsius.
- Since XWIS requires 36 or 51 rows of data, zero is used if some rows do not contain data.
- Variables are used to enable one derived table to read column values from other derived tables.

## Universe Reference Information

This section provides reference information about the Executive Scorecard universes.

- Each data source has one universe.
- The universes contain the key performance indicator (KPI) calculations. The KPI calculations are not created in the Web Intelligence (Webi) reports.
- Since each data source has unique date or period dimensions, the Executive Scorecard universes for FPA and PPM data use derived tables to standardize date handling. The names of the derived tables are prefixed with **DT\_**. The same date handling exists in the views for DC and BSM data rather than in the DC and BSM universes. For more information about date handling, see [Date Handling on page 50](#).
- Each universe has an ODBC connection to the corresponding source database.



# 3 Work with the Executive Scorecard Customizable Workspace









Executive Scorecard provides a customizable environment for viewing information. You can add pages or change the layout of an existing page, you can add or remove components on a page, and you can edit or create external components.

## Executive Scorecard Tools

The Executive Scorecard provides page-level and component-level tools that enable you to customize the application.







### Page Management Toolbar

The Page Management toolbar, on the upper right of the workspace, enables you to create pages, add components to pages, and define component properties. The tools available depend on the page. Some of these tools may not be available.



Tool	Description
	Click to refresh the visual elements of the work space.
	Click to save changes to a page. The current page saves to the Page Gallery. A dialog box enables you to name the page, give the page a description, and select a category for the page.
	Click to open the Page Gallery. The Page Gallery contains default pages as well as pages you have created. You can create pages, edit page definitions, or open pages from the Page Gallery. You can drag a page from the gallery to your workspace to open the page.
	Click to open a new blank page.
	Click to open the current page in edit mode so that you can change the layout.
	Click to open the Component Gallery, which contains default components as well as components you have added. From the Component Gallery, you can edit component definitions or add components to a page. You can drag a component from the gallery to a page in your workspace, then save the component on that page.
	Click to define the wiring between components on a page. This determines how components interact with one another.
	Click to start a slide show of open pages. Each page is displayed for 10 seconds.

## Component Toolbar


The Component toolbar on the upper right of each component enables you to perform administration tasks for the component. The tools available depend on the component. Some of these tools may not be available.


Tool	Description
	Click to open the Component Menu. The options in the menu depend on the component. Some of these options may not be available: <b>Preferences:</b> Enables you to rename a component. <b>Wiring:</b> Enables you to customize how this component interacts with the other components on the page. <b>Refresh:</b> Click to manually refresh the component. <b>Help:</b> Click to open the component help.
	Click to define filtering for the component if the component supports internal filtering.
	Click to display the component in a separate popup window.
	Click to collapse a component.
	Click to expand a component.
	Click to close a component. This removes the component from the page.

## Add a Page to the Executive Scorecard



1. Click **Page Gallery** to open the Page Gallery. 
2. In the Categories pane, click the category for the page that you want to add.
3. Select the page and click **Open Page**. 

## Add a Component to a Page


1. Open that page that you want to add the component to.
2. Click **Components** to open the Component Gallery. 
3. In the Categories pane, click the category for the component that you want to add.
4. Click the component and drag it to a location on the open page.
5. Click **Close** to close the Component Gallery.

You can drag the components on the page to rearrange them. Then click **Save** to save the page. 



## Create an External Component

1. Click **Components** to open the Component Gallery. 
2. Click **Add external component**. 
3. In the New Component window, provide these details:
  - **Name:** Type a name for the new component.
  - **URL:** The URL for an external component must begin with https://, http://, or ftp://.
  - **Description:** Type a brief description of the new component.
  - **Categorize Component:** If necessary, click **Categorize Component** to expand the list of categories. Select the category or categories you want to file the new component in.

You do not need to provide Wiring Context or URL Parameter information.
4. Click **OK**. The new component becomes available in the Component Gallery.

You can click the new component and drag it onto a page. Click **Save** to save the new component on the page. 

## Edit an External Component

1. Click **Components** to open the Component Gallery. 
2. Select the component you want to edit.
3. Click **Edit Component Properties**. 
4. In the New Component window, edit any of these details:
  - **Name:** Type a name for the component.
  - **URL:** The URL for an external component must begin with https://, http://, or ftp://.
  - **Description:** Type a brief description of the component.
  - **Categorize Component:** If necessary, click **Categorize Component** to expand the list of categories. Select the category or categories you want to file the component in.
5. Click **OK** to save the changes to the component properties.

