Oracle® Balanced Scorecard

User Guide

Release 11*i*

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Oracle Balanced Scorecard User Guide, Release 11*i*

Part No. A95235-09

Primary Author: Claudia Castro

Contributing Author: German Arcinegas, Patricia Perdomo, Christine Monk, Sameer Chhabra

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Balanced Scorecard User Guide*.

This guide is intended for users who view scorecards created in Oracle Balanced Scorecard. For information on creating scorecards, see: *Oracle Balanced Scorecard Administration Guide*.

See Related Documents on page viii for more Oracle Applications product information.

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Structure

1 Introduction
2 Using Oracle Balanced Scorecard

Related Documents

Oracle Balanced Scorecard Administrator Guide

Oracle Balanced Scorecard Install Guide

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Introduction

This chapter covers the following topics:

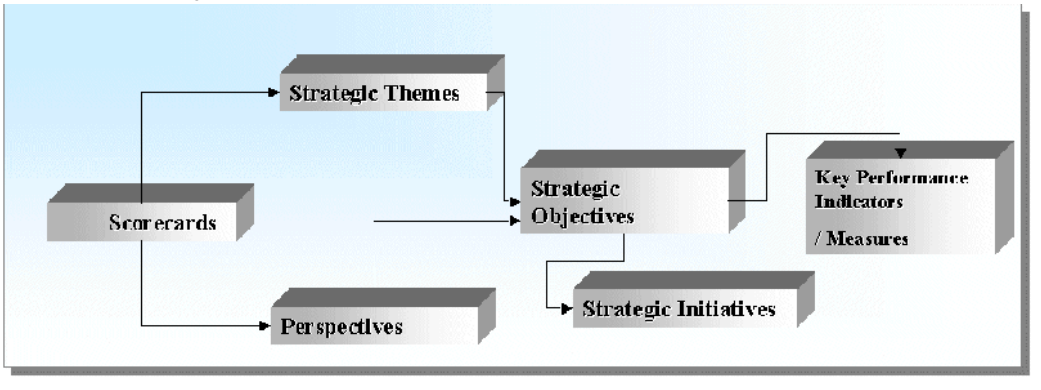
- Balanced Scorecard Methodology
- Balanced Scorecard Perspectives
- Oracle Balanced Scorecard

Balanced Scorecard Methodology

Traditional performance measurement systems typically do not provide top managers with a comprehensive view of the organization. The Balanced Scorecard is a performance measurement methodology, developed by Kaplan and Norton, that exceeds the typical scope of traditional performance measurement systems. The Balanced Scorecard methodology links the financial goals of an enterprise with the drivers that determine future success.

The Balanced Scorecard methodology translates an organization's mission and strategy into a set of strategic objectives and key performance indicators. It provides the framework for a strategic management system that enables executives to monitor the success of the strategy across the organization. While Balanced Scorecard retains an emphasis on achieving financial objectives, it also includes other important perspectives that drive these financial objectives. The following figure shows the typical elements of the Balanced Scorecard methodology.

Scorecard Theory



In the preceding figure, each scorecard contains a set of strategic themes and perspectives. These themes and perspectives are translated into strategic

objectives. Strategic objectives are supported by strategic initiatives and can contain one or more measures. Strategic initiatives are the critical projects that an organization needs to complete to accomplish a strategic objective. Measures are the areas that an organization needs to focus on to accomplish a strategic objective. Measures are usually associated with a plan and an owner, so the people involved can follow-up on the implementation of the strategy.

Balanced Scorecard Perspectives

The Balances Scorecard methodology measures performance using four perspectives:

- Financial Perspective
- Customer Perspective
- Internal Business Process Perspective
- Learning and Growth Perspective

The Balanced Scorecard methodology assumes that the **financial perspective** includes *lagging indicators,* and that management's attention should be focused on the underlying factors that drive those indicators. In the Balanced Scorecard methodology, the customer, internal business processes, and learning and growth perspectives all combine to drive financial performance.

It is important to understand how the financial perspective is related to the other Balanced Scorecard perspectives.

The **customer perspective** drives the financial perspective because customers buy a company's products and services, and they are, ultimately responsible for the company's financial success.

The **internal business process perspective** supports the customer perspective because the company must be well run in order to satisfy its customers.

The **learning and growth perspective** impacts the internal process perspective because the employees must continually re-educate themselves and learn the best processes to run the company.

Together, the four Balanced Scorecard perspectives represent a typical conceptual grouping of measures, however, measures can also be grouped by objective, organizational unit, or function. Additional perspectives can be added depending on the organization's environment and strategic goals; or the names of perspectives can be changed to better reflect the organization and its values.

Oracle Balanced Scorecard

Oracle Balanced Scorecard is a strategic management application that is based on the Balanced Scorecard methodology developed by Kaplan and Norton.

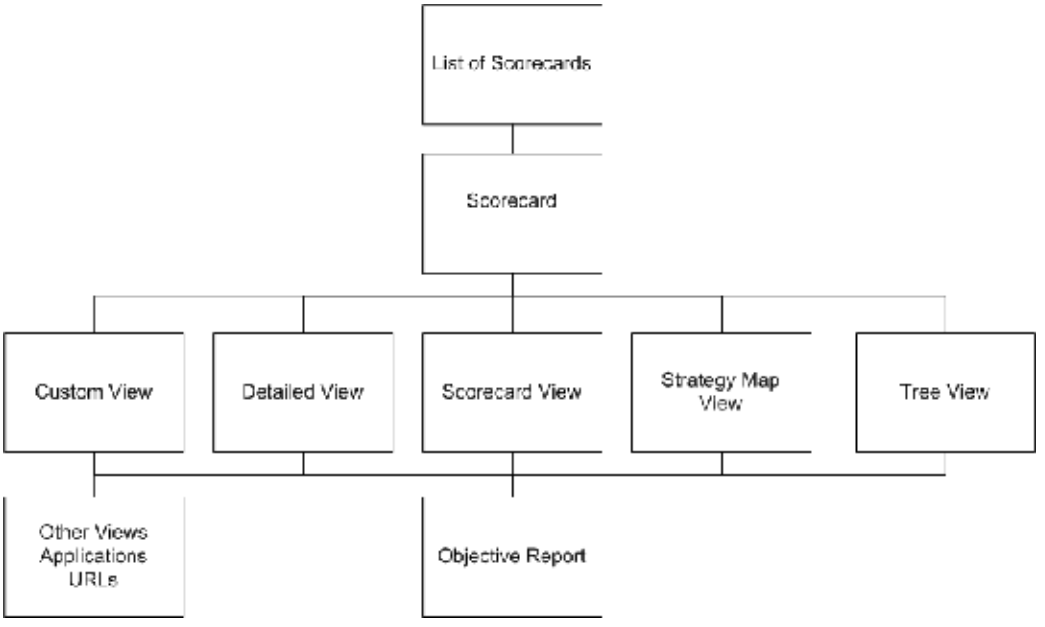
It enables companies to measure performance by representing their strategy in scorecards that are supported by objectives and KPIs.

Conceptually, each strategy can be broken down into one or more scorecards. Each scorecard contains a set of objectives that you can use to judge the performance of the scorecard. In turn, each objective can be supported by several KPIs.

Within Oracle Balanced Scorecard, each scorecard can be represented by several views. Each view lists the objectives that belong to the scorecard. You can drill on each

objective to view an objective report which provides detailed information about the objective and the KPIs that support the objective. If you drill from the Custom View you can also drill to other views, applications, or URLs.

Scorecard Navigation



The scorecards are used and supported by three different types of users:

- **Viewers** who are the end-users responsible for using scorecards to monitor performance,
- **Designers** who are responsible for creating the scorecards, and
- **Administrators** who are responsible for setting up the application and maintaining the data structure.

The *Oracle Balanced Scorecard User Guide* describes how viewers can use scorecards to monitor performance.

The *Oracle Balanced Scorecard Administration Guide* describes how designers and administrators can create the scorecards and the data required to monitor performance.

Terminology

Before you begin using Oracle Balanced Scorecard, you should understand the following terms:

- **Administrator:** The scorecard administrator is responsible for installing, implementing, and maintaining Balanced Scorecard. The scorecard administrator loads data and is responsible for managing any data-related issues. The scorecard administrator is also responsible for creating and setting up users, and securing scorecards, objectives, and display options.
- **Alarm:** Indicates the status of an objective. The possible statuses are: acceptable, marginal, or unacceptable. The status is based on how the objective falls within a set of defined tolerance ranges for the objective's expected

performance. For example, if Revenue decreases by more than 5%, then the alarm will indicate that Revenue is either marginal or unacceptable performance, depending on how the tolerance ranges are set. If an objective is supported by several KPIs, then the status of the objective is the status for the default KPI for the objective.

- **Custom:** In this guide, "custom" is used to denote any content created using the application.
- **Designer:** The scorecard designer is responsible for creating the scorecards, views, KPIs, objectives, and dimensions. The scorecard designer defines the default settings for scorecards and the objective report. The scorecard designer also sets the alarm conditions for the objectives.
- **KPI:** A calculation or metric that is used to support an objective. Each objective can be supported by one or more KPIs; however, there is only one default KPI for each objective. The status of the default KPI determines the status of the objective. KPIs can be preseeded or created by the scorecard designer.
- **Objective:** A metric used to gauge performance in a particular area, for example, Increase Revenue, Reduce Service Calls, and Maximize Sales Growth.
- **Preseeded:** In this guide "preseeded" is used to denote any content that is provided with Oracle Applications. For example Oracle Daily Business Intelligence provides several preseeded KPIs that can be reused in other applications.
- **Production:** Refers to any scorecard which is available to viewers in the List of Scorecard window. To be a production scorecard, the design must be complete and the Generate Database process and the Data Load process must have been run. Also, the user must be assigned access for the scorecard.
- **Scorecard:** A representation of a company strategy that maps objectives and KPIs to the strategy using the Balanced Scorecard methodology. Viewers use the scorecard to compare actual and planned performance.
- **Strategy:** A high-level plan that a company wants to follow. A strategy is generally a collection of objectives. For example, a strategy might be to improve overall business by increasing customer satisfaction, reducing the cost of goods sold, and increasing sales.
- **View:** A way of viewing a scorecard. There are five possible views available in Oracle Balanced Scorecard:
  - Tree view
  - Scorecard view
  - Strategy Map view
  - Detailed view
  - Custom view
- **Viewer:** The Viewer is the user who is responsible for using the scorecard to compare actual corporate performance to planned or forecasted performance.

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Using Oracle Balanced Scorecard

This chapter covers the following topics:

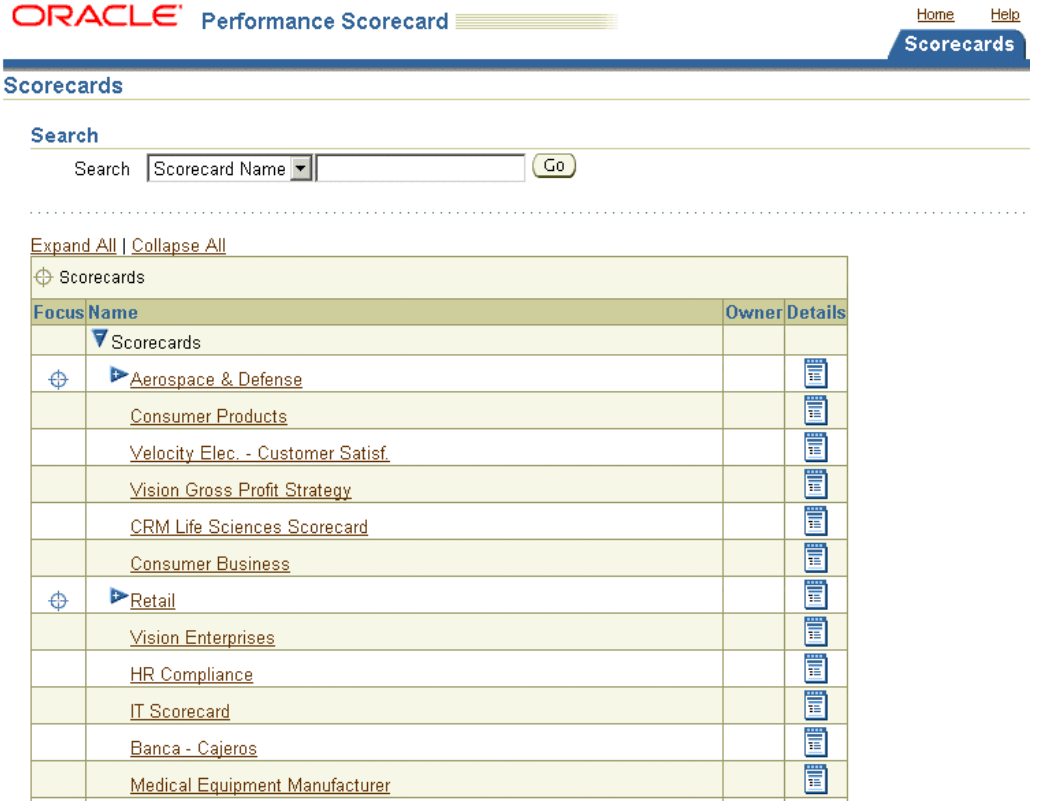
- List of Scorecards
- Scorecard Views
- Alarms
- Objective Report
- Printing
- Exporting to Excel
- Balanced Scorecard Portlets

List of Scorecards

The List of Scorecards window provides a hierarchical list all the scorecards for your responsibility.

> **Note:** The hierarchical relationships between scorecards does not imply a roll-up of data. It only indicates a logical, parent-child relationship between the two scorecards.

List of Scorecards Window



For each scorecard, you can view the following information.

- **Scorecard Name:** Click on the scorecard name to open the default scorecard view.
- **Owner:** The owner of the scorecard. The owner is either the person responsible for monitoring the scorecard or the person responsible for making decisions about the particular objectives in the scorecard. Click the owner's name to send an e-mail to the owner.
- **Details:** The name, owner, and description of the scorecard.

  Note: You must have an e-mail application installed to use the e-mail feature.

An additional column can also appear, if it is configured by the scorecard designer.

Scorecard Views

You can view scorecards using the following scorecard views:

- Custom view, page 2-3
- Detailed view, page 2-4
- Scorecard view, page 2-5
- Strategy Map view, page 2-6
- Tree view, page 2-7

Each scorecard view is based on the same content (objectives, KPIs), but each view is designed to provide a different perspective on that content by focusing on a different purpose, audience, layout, or organizational scheme. For example, the Strategy Map View displays the cause and effect relationships between objectives, whereas the Detailed View contains a complete list of objectives and KPIs in the scorecard.

The scorecard designer is responsible for creating one or more views for each scorecard, and for setting the default view for the scorecard. Not all scorecards have all views enabled.

You can switch between any of the available views by selecting the view from the list of values.

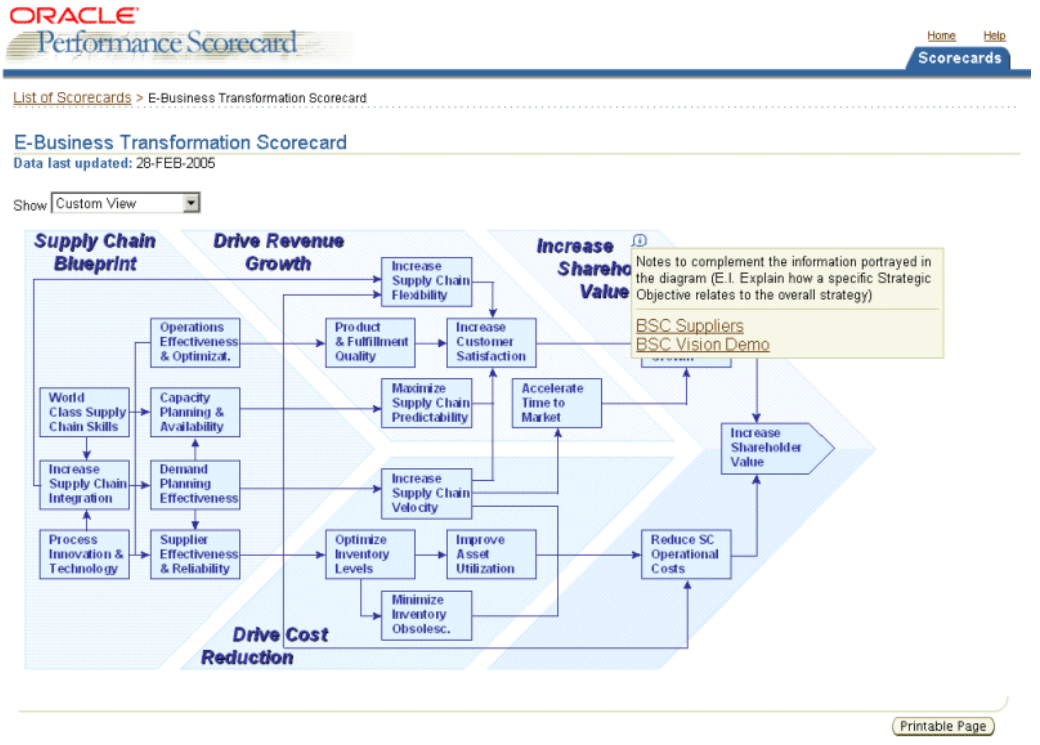
Custom View

The custom view is created by the scorecard designer. Each scorecard can have an unlimited number of custom views. Each custom view can be designed for a specific audience or organizational schemes. For example, the scorecard designer can create a custom view that shows only the top five objectives in a scorecard.

The custom view is the only view that enables you to navigate across multiple related views and drill down to more detailed information for a particular scorecard. It also contains the following unique features:

- **Hot spots:** Link to an objective.
- **Links to custom views:** Link from one custom view to another.
- **Launchpads:** Link to other related views or objects, such as other reports, workbooks, or URLs. Launchpads can also contain additional information about the objectives or strategy displayed in the view. For example, a launchpad may explain how a specific strategic objective relates to the overall scorecard strategy. Launchpads are indicated by an “i” icon.

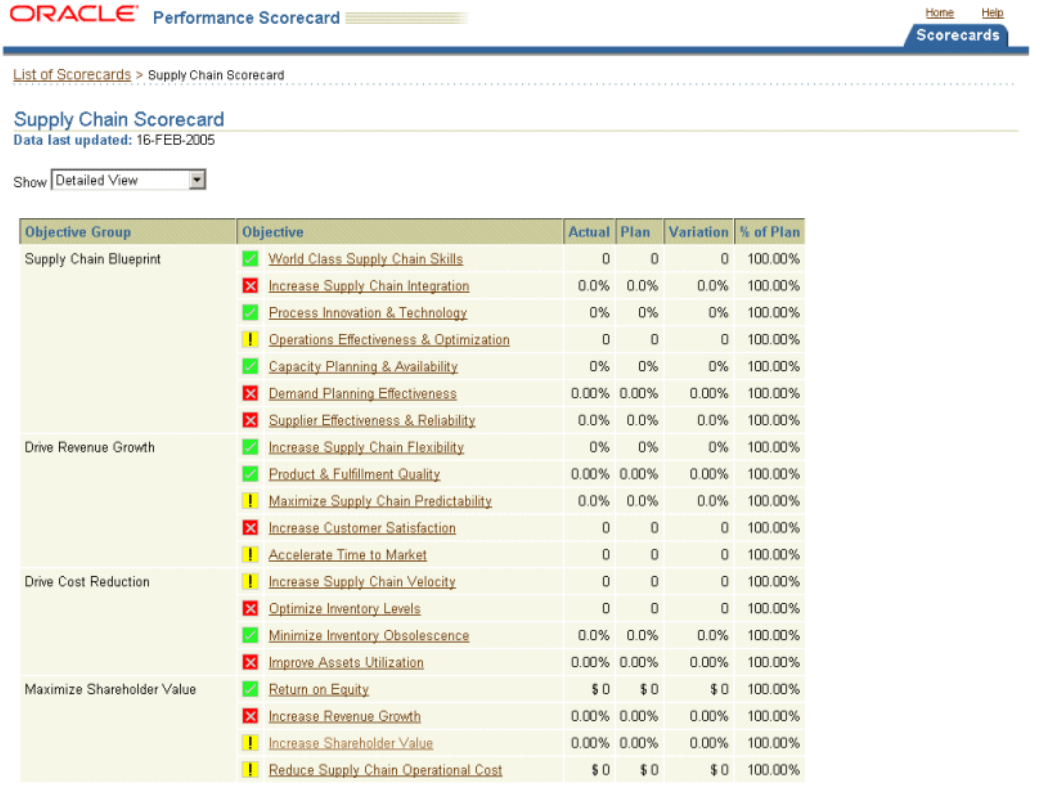
Custom View with Launchpad Example



Detailed View

The detailed view displays the underlying data for each objective. The underlying data includes: Actual, Plan, Variation, and Percent of Plan data. This view enables you to interpret how the alarms are calculated for each objective.

Detailed View Example

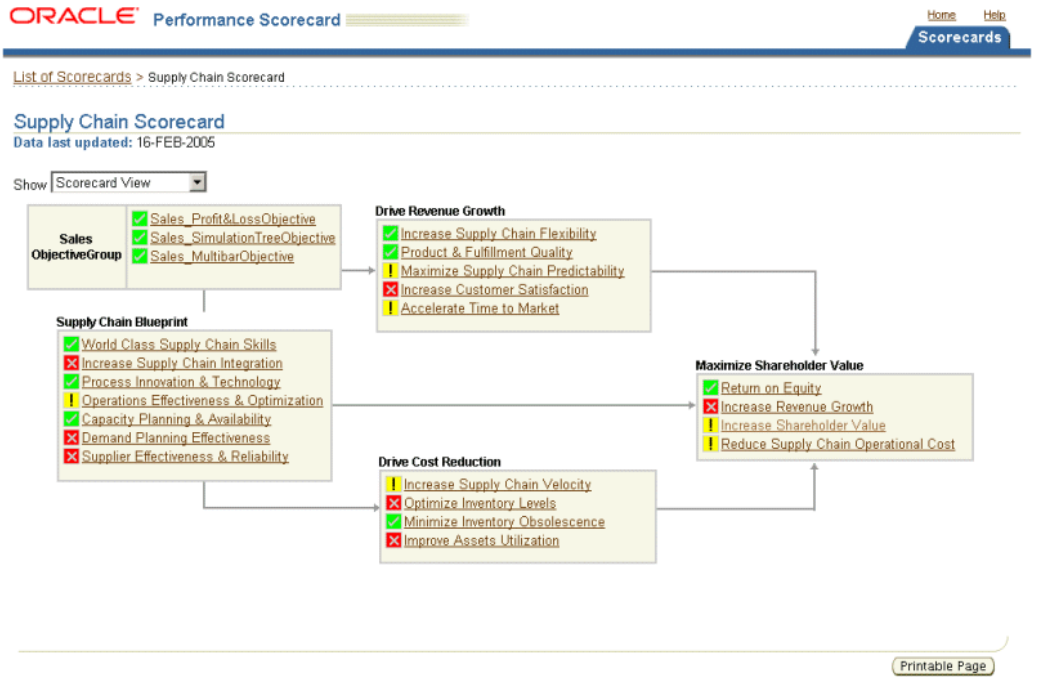


Objective Group	Objective	Actual	Plan	Variation	% of Plan
Supply Chain Blueprint	World Class Supply Chain Skills	0	0	0	100.00%
	Increase Supply Chain Integration	0.0%	0.0%	0.0%	100.00%
	Process Innovation & Technology	0%	0%	0%	100.00%
	Operations Effectiveness & Optimization	0	0	0	100.00%
	Capacity Planning & Availability	0%	0%	0%	100.00%
	Demand Planning Effectiveness	0.00%	0.00%	0.00%	100.00%
	Supplier Effectiveness & Reliability	0.0%	0.0%	0.0%	100.00%
Drive Revenue Growth	Increase Supply Chain Flexibility	0%	0%	0%	100.00%
	Product & Fulfillment Quality	0.00%	0.00%	0.00%	100.00%
	Maximize Supply Chain Predictability	0.0%	0.0%	0.0%	100.00%
	Increase Customer Satisfaction	0	0	0	100.00%
	Accelerate Time to Market	0	0	0	100.00%
Drive Cost Reduction	Increase Supply Chain Velocity	0	0	0	100.00%
	Optimize Inventory Levels	0	0	0	100.00%
	Minimize Inventory Obsolescence	0.0%	0.0%	0.0%	100.00%
	Improve Assets Utilization	0.00%	0.00%	0.00%	100.00%
Maximize Shareholder Value	Return on Equity	$ 0	$ 0	$ 0	100.00%
	Increase Revenue Growth	0.00%	0.00%	0.00%	100.00%
	Increase Shareholder Value	0.00%	0.00%	0.00%	100.00%
	Reduce Supply Chain Operational Cost	$ 0	$ 0	$ 0	100.00%

Scorecard View

The scorecard view lists all of the objectives in the scorecard, organized into boxes. Each box represents a logical grouping of perspectives or strategic themes for the scorecard.

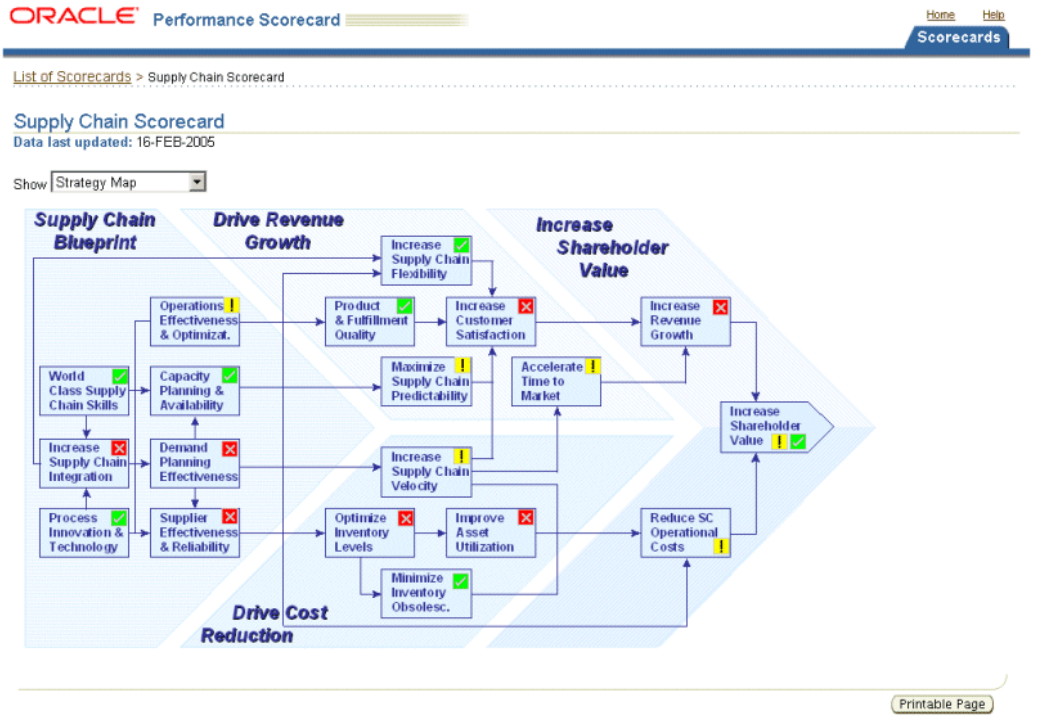
Scorecard View Example



Strategy Map View

The Strategy Map view shows the cause-and-effect relationships between the objectives in the scorecard. For example, in the example below, the objectives are organized according to the four Balanced Scorecard perspectives: Learning and Growth, Internal Process, Customer, and Financial. The scorecard designer can use any methodology to show the cause-and-effect relationship between the objectives.

Strategy Map View Example

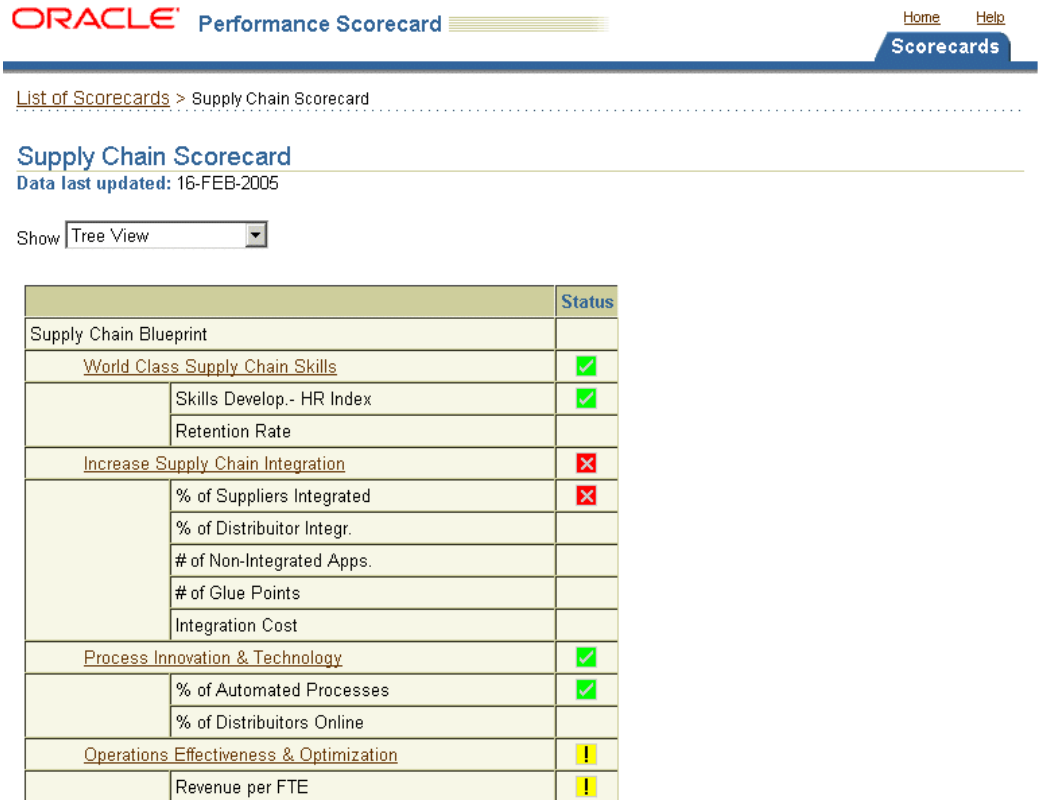


Tree View

The tree view lists all of the objectives in the scorecard, organized into a tree that represents the perspectives or strategic themes of the scorecard. This view also shows the KPIs that support the objective.

Note: The default KPI for an objective appears with an alarm next to it.

Tree View Example



Alarms

Alarms indicate the status of an objective. Alarms show if actual data is acceptable, compared to your plan, and enable you to identify data for further analysis. You can click on an alarm to drill down to a more detailed view of the objective.

Alarm Examples

Unacceptable < 90 %
Marginal >= 90 % - < 100 %
Acceptable >= 100 %

The following table shows the default alarm statuses. The scorecard designer can customize the status for each objective.

Alarm Status, Icon, and Color Examples

Trigger Example	Alarm Status	Icon	Color
Actual revenue is greater than or equal to 100%, which meets or exceeds plan	**Acceptable Performance**	Checkmark	Green
Actual revenue is 81% to 100%, which is less than plan, but tolerable	**Marginal Performance**	Exclamation Point	Yellow
Actual revenue is less than 81%, which is beyond a tolerable range	**Unacceptable Performance**	X	Red

Triggering Alarms

Alarms are triggered by comparing actual data to other data, such as a plan, budget, or forecast. If compare to data has not been loaded, alarms are disabled.

The following factors determine how an alarm is triggered.

- System
  - Is the system in production or prototype mode?
- Objective
  - What are the KPI options?
  - What are the dimension objects?
  - What is the default periodicity?
  - What are the alarm triggers?
- Data
  - What is the percent deviation from the planned value?
  - When was the data last collected?

Alarms by Objective

Alarms for the following objectives are calculated in a different manner.

- **Trend Graph:** Compares the current month's actual values against the plan or budget values for the last updated period for the default KPI.
- **Comparison Graph:** Alarms for all objectives in comparison mode are triggered as follows:
  - If *any* dimension object value is unacceptable, the alarm is unacceptable.
  - If *any* dimension object value is marginal, the alarm is marginal.
  - If *all* dimension object values are acceptable, the alarm is acceptable.

  Trigger values are used to calculate a separate color for each dimension object value for the default KPI options of the comparison dimension object.

- **Simulation Tree:** Compares the actual values to plan or budget values for a specific node of the tree, as defined by the scorecard designer.
- **Profit and Loss:** The result account for the objective (usually the net profit/loss or net income account).

Objective Report

The objective report provides additional information on an objective. To drill to this report, click on the objective in the scorecard view.

Objective Report

This report shows objective performance in graph and table format. It also displays the KPIs, KPI options, and dimensions used to calculate the performance.

Depending on how the objective was defined by the scorecard designer, the objective report may also contain the following items:

- **Cause and Effect Matrix:** Shows the relationship between the underlying KPIs.

- **Additional Information:** Describes how to interpret the calculations and provides links to other related content.
- **Assessments and Collaborations:** Enable the objective owner and users to enter qualitative information about the objective performance.

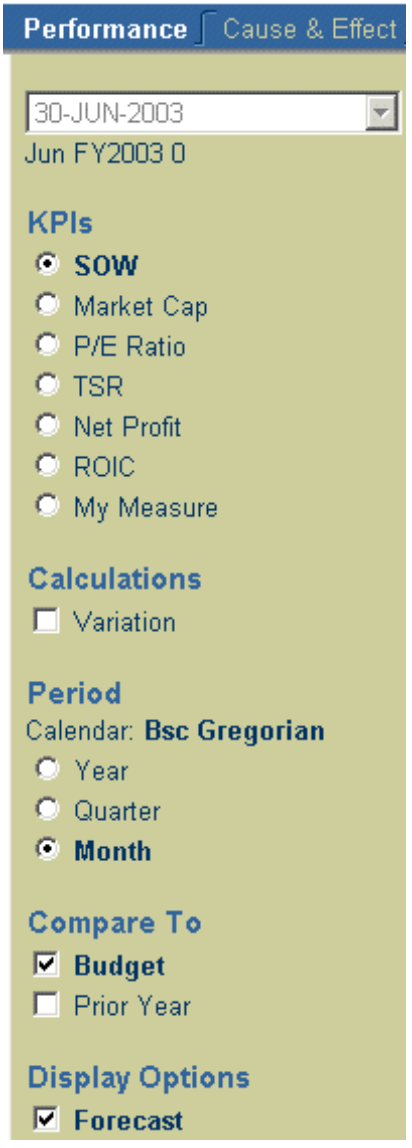
In this report you can view the trend for an objective over time to see if it matches the plan or budget, or you can compare the actual performance against a plan or budget.

Actual data is shown using darker bars, while plan or budget data is shown using lighter colors.

KPI Options

For each objective you can select the KPI and the KPI options that you want to view. These options determine how the objective performance is calculated. You can change the default KPI options to view different performance perspectives.

KPIs and KPI Options



The following is a complete list of the available KPI options. The list of available KPI options is configured by the scorecard designer.

- **KPIs:** The KPIs used to calculate the objective performance. KPIs are either preseeded or they are created by the scorecard designer.

  See: KPIs, page 2-13.

- **Calculations:** The calculation used to calculate the objective performance. Some calculations can be combined with others to create a complex performance calculation. For example, if you select Variation, Percent, and Year to Date, you can view the Year to Date variation in percentage. The Percent and Growth, Year to Date, and Year to Date Growth cannot be combined with other calculations.

  See: Calculations, page 2-13.

- **Period:** The period frequency (also referred to as periodicity) used to calculate the objective performance. For example, you can choose to calculate the performance KPI weekly, monthly, or yearly.
- **Compare To:** The value used to calculate the objective performance. For example, you can compare actual data against budget, plan, previous year, competition, or industry average data. The default compare to value is the plan or budget, which drives the alarm for the objective.
- **Display Options:** The display options used to calculate the objective performance. For example, you can compare actual data against the company or against the competition. Display options can also be used to show data correlations among multiple trend lines. For example, you can compare advertising against sales to see if they are related.

  Note: Display Options is only available if one of the objective KPIs is associated with a display option.

KPIs

KPIs are calculations or metrics that are either preseeded by Oracle Applications or created by the scorecard designer. Preseeded KPIs are delivered with Oracle Daily Business Intelligence.

Alarms for preseeded KPIs are based on the default dimension settings for the KPI, as defined by the scorecard designer. Unlike KPIs that are created by the scorecard designer, the available periods for preseeded KPIs are determined by the Time view by option.

You can change the default KPI options for preseeded KPI, but you *cannot*:

- Toggle between trend and comparison graphs
- View the comparison graph in pie chart format

If you have the appropriate security access, preseeded KPIs also enable you to:

- Drill down to related reports and links for the KPI
- Edit targets for the KPI

For more information on preseeded KPIs, see *Oracle Daily Business Intelligence User Guide*.

Calculations

You can select one or more of the calculations listed below to calculate performance. Not all KPIs have all calculations enabled. The scorecard designer is responsible for enabling the appropriate calculations.

Only the Percent and Growth, Year To Date, Year to Date Growth and Period to Date calculations cannot be combined with other calculations.

- **Variation:** The amount that actual results vary from the compare to value.
- **Percent:** The actual results as a percentage of the compare to value.
- **Cumulative YTD:** The cumulative actual results for the current year. This calculation accumulates actual data from the first day of the year to any point in time in the year. In the objective view for balance accounts (such as Total Assets). Cumulative YTD will be disabled since it does not apply.

- **Cumulative QTD:** The cumulative actual results for the current year presented by Quarter. This calculation accumulates actual data from the first to the last quarter of the year. For instance the accumulated figure of Sales from Q1 to Q3 vs. the same figure in the Previous year for the same quarters. In the objective view for balance accounts (such as Total Assets). Cumulative QTD will be disabled since it does not apply.
- **YTD Growth:** The current period versus the last period of the previous year (final results for the previous year). For example, March 1999 is compared versus October 1998, the last fiscal month of the previous year.
- **YTY Growth:** The growth between the current period versus the same period in the previous year.
- **To Complete:** The previous period and actual period relative to the plan. The difference between accumulated results and the targeted goal is then distributed equally over the remaining periods.
- **Growth:** The percentage change between the preceding period and the current period.
- **Contribution:** The amount each data dimension element contributes to the total results for that dimension. This calculation is only available for comparison graphs.
- **MAT:** The moving average for the last twelve months.
- **Data Variation:** The amount of variation between any two series in the same period is calculated. This calculation is used for multiple bar objectives only.
- **Period to Date:** Period to Date calculations enable you to compare data in one period with another period, based on an "as of date".

Period to Date Calculations

Period to date calculations introduce the concept of "as of date" reporting. The "as of date" defines the length of the period that you want to view in the objective report. For example, if the "as of date" is July 10 and the period is month, then the report displays data from July 1 to July 10 and from August 1 to August 10.

However, if the periods being compared are of different lengths, then the system identifies the number of days left in the period and uses that to calculate the period to date. For example, when the as of date is July 10, the period has 21 days remaining. When you compare that data against another period that has fewer days (such as September, which has only 30 days) the system reduces 21 from the total number of days in September. Therefore, it displays data from September 1 to 9.

In case where the period is year and the years being compared are of different lengths, such as, leap and non-leap years, the system uses the same method to display data.

The following rules apply to period to date calculations:

- Period to Date can only be calculated, if, data for the objective is collected on a daily basis.
- Period to Date cannot be selected in combination with any other calculation.
- Period to Date cannot be displayed in Pie Charts.
- The default "as of date" for the Period to Date calculation is either the current system date or to the most recent date that has actual data.

- In Bar Graphs, Period to Date values are shown as a line over the bar graph.

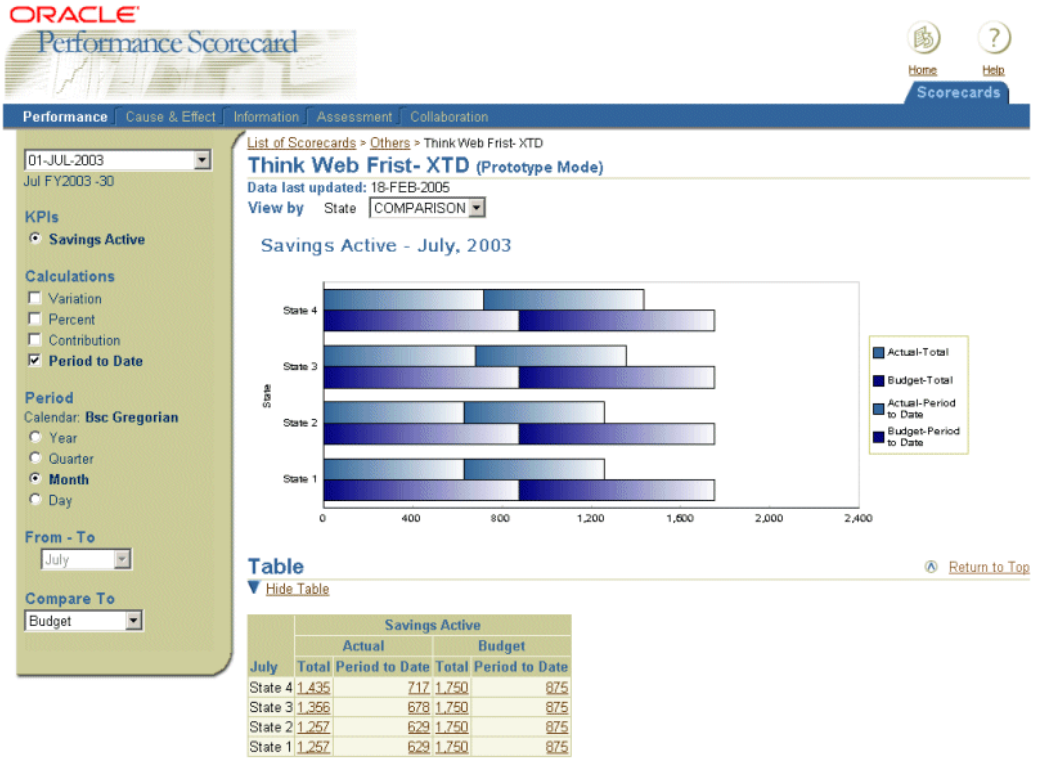
Bar Graph with Period to Date

- In Line Graphs, a second line of the same color illustrates the Period to Date values.

Line Graph with Period to Date

- When Period to Date is selected with a compare to value, the compare to value will appear as a second bar. A marker over the bar will indicate the Period to Date value against the total current value.

Line Graph with Period to Date and compare to value



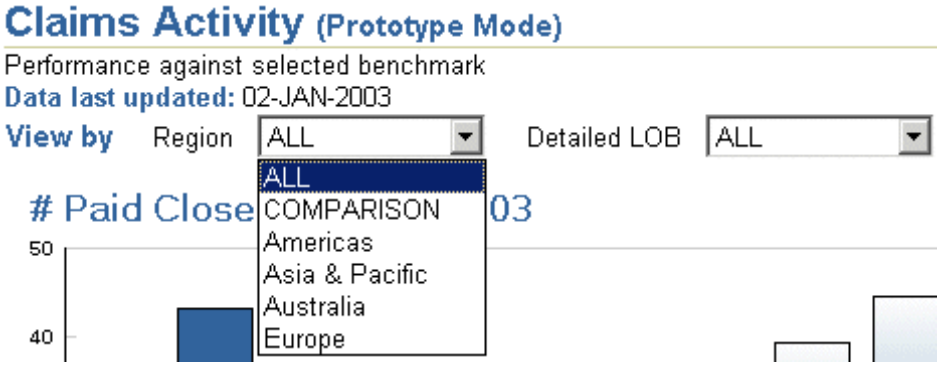
- You can only select one KPI and one compare to value for Period to Date calculations.
- The data compared must be based on same unit of KPI.

Dimensions (View By Options)

Dimensions, also known as View By options are similar to KPI options, in that they enable you to change the data displayed on the objective report. A dimension enables you to narrow the focus of your analysis by drilling down on a single perspective for an objective.

For example, you can view sales results for all locations or drill down along the geography dimension to view the results for a specific territory (Europe, North America, Asia) or location (London, New York, Tokyo) in your organization. Choose "All" to see the summarized result for the dimension, or "Comparison" to compare all of the objects in the dimension.

Dimensions



The list of available dimensions objects and values is defined by the scorecard designer.

Graphs and Other Display Options

The objective report can display objective performance using trend graphs, comparison graphs, simulation trees, or profit and loss bar charts.

Trend and comparison graphs are the most common method of showing performance. The following icons are used to represent different types of data in trend and comparison graphs:

- **Square:** Actual Data
- **Circle:** Budget Data
- **Diamond:** Previous Year Data

Other icons are assigned randomly to the rest of the display options.

You can toggle between trend and comparison graphs by clicking on a value in the graph.

In both graph types, the scorecard designer defines the default number of periods displayed in the trend graphs.

If the scorecard designer enables the Viewport feature, you can also specify the number of periods displayed.

Trend Graphs

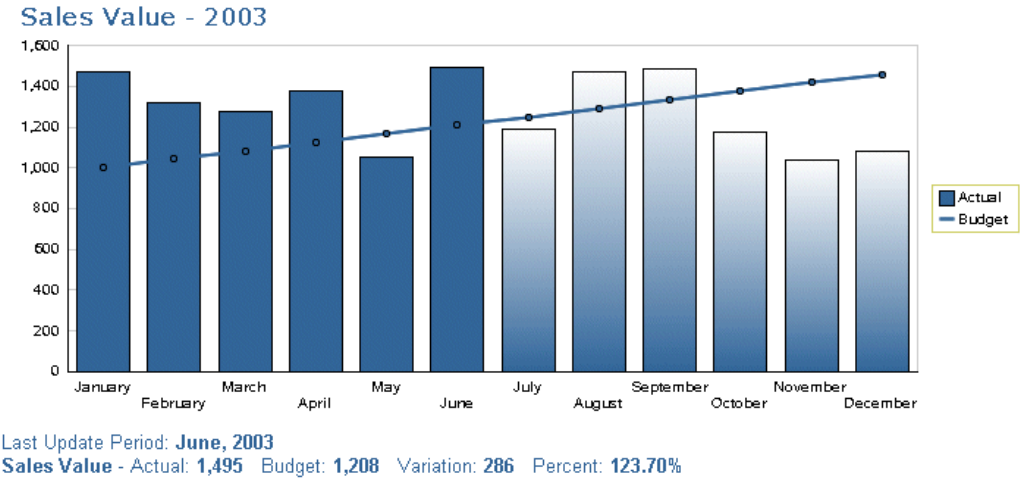
Trend graphs plot data over time. Depending on the KPI options you choose, you can either view a trend graph for single display options and compare to value (single bar trend graph), or for multiple display options and compare to values (multiple series trend graphs).

In all trend graphs, actual data is shown in bar format and compare to values are shown as a trend line.

Trend graphs display one bar for each period, with a maximum of 12 periods. For example, if the period type is Week, the trend graph would display 12 weeks of data, not 52 weeks.

The information line below the trend graph summarizes information for the last updated period in the graph. The line is updated whenever you change a KPI option.

Line in Trend Graphs



The line displays the following data.

- **Actual:** Actual data for the last period displayed.
- **Compare To:** Compare to values for the last period displayed.
- **Variation:** Difference between the actual and compare to data.
- **Percent:** Actual data divided by compare to data, expressed as a percentage of the selected compare to data.
- **Last Period:** The last actual period displayed.

When there are multiple display options selected, one line will appear for each display option.

The information line shows only actual and last period data in the following cases:

- Two or more compare to values are selected
- The analysis does not have a plan defined and there is no other compare to value selected.

> **Note:** The information line does not display variation and percent if there is no variation and percent defined for the KPI.

Single Bar Trend Graph

In the figure above, a single bar trend graph is used to show the units of beers sold against the sales forecast. Actual sales are shown from January to June, forecasted sales are shown from July to December, and the sales plan is shown as the trend line across the bars.

Multiple series trend graphs show actuals for several display options and several compare to values over time in the same graph. A legend at the bottom of the graph indicates which series and which compare to values are shown on the graph.

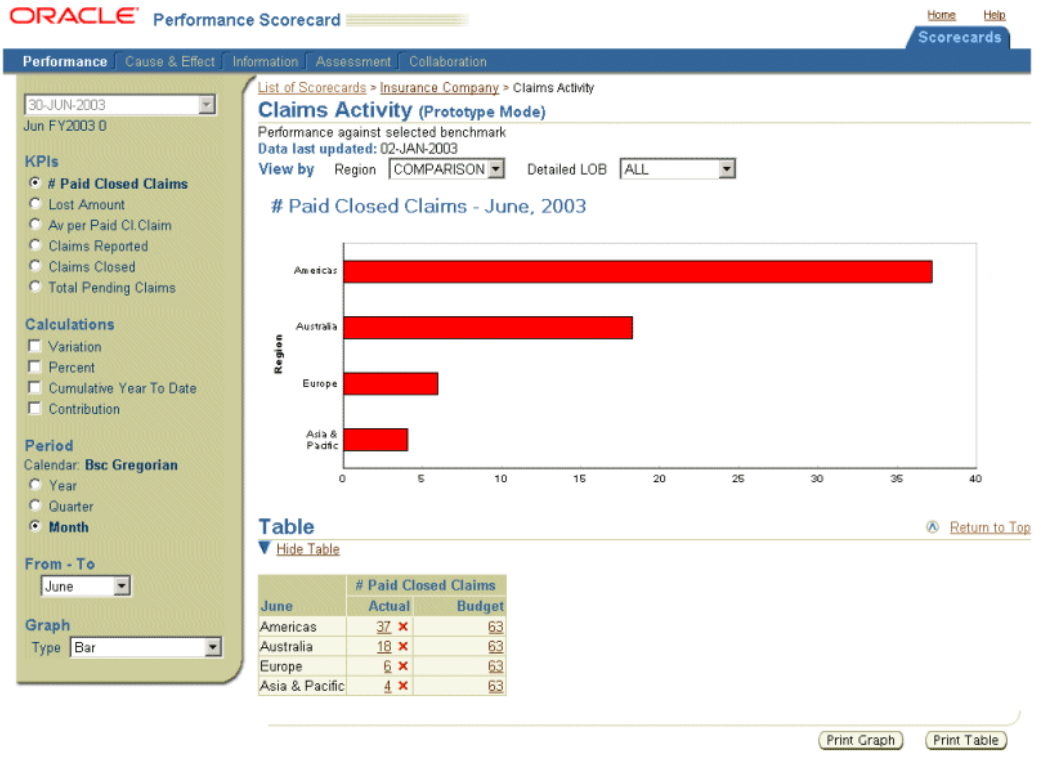
Multiple Series Trend Graph

In the figure above, a multiple series trend graph shows Sales, % Availability, and Market Share data against the sales forecast.

Comparison Graphs

Comparison graphs compare the objective performance against a plan or budget for a single period. You can view comparison graphs in either bar graph or pie chart format.

Bar Graph

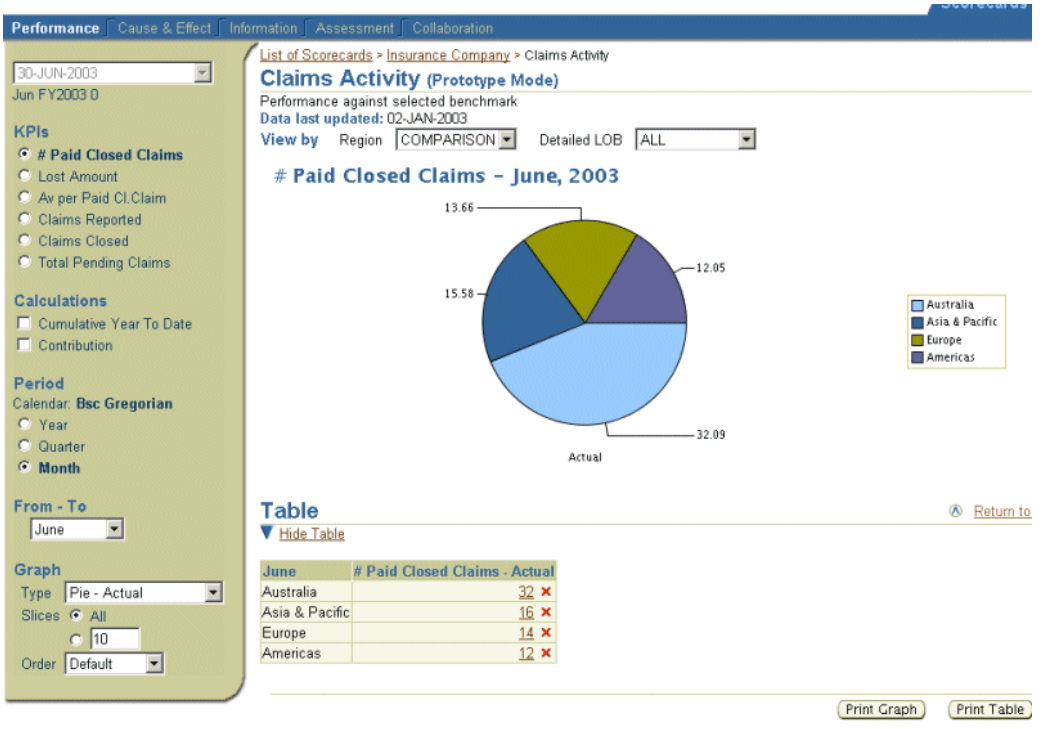


Pie charts are only available for comparison graphs. You can only view a pie chart if no calculation method is selected or if the following calculation methods are selected:

- Contribution
- Year to Date
- Quarter-to-Date

Pie charts can display actual, or actual and plan data only. They cannot display other display options.

Pie Chart with Actual Data Only



Pie Chart with Actual and Plan Data

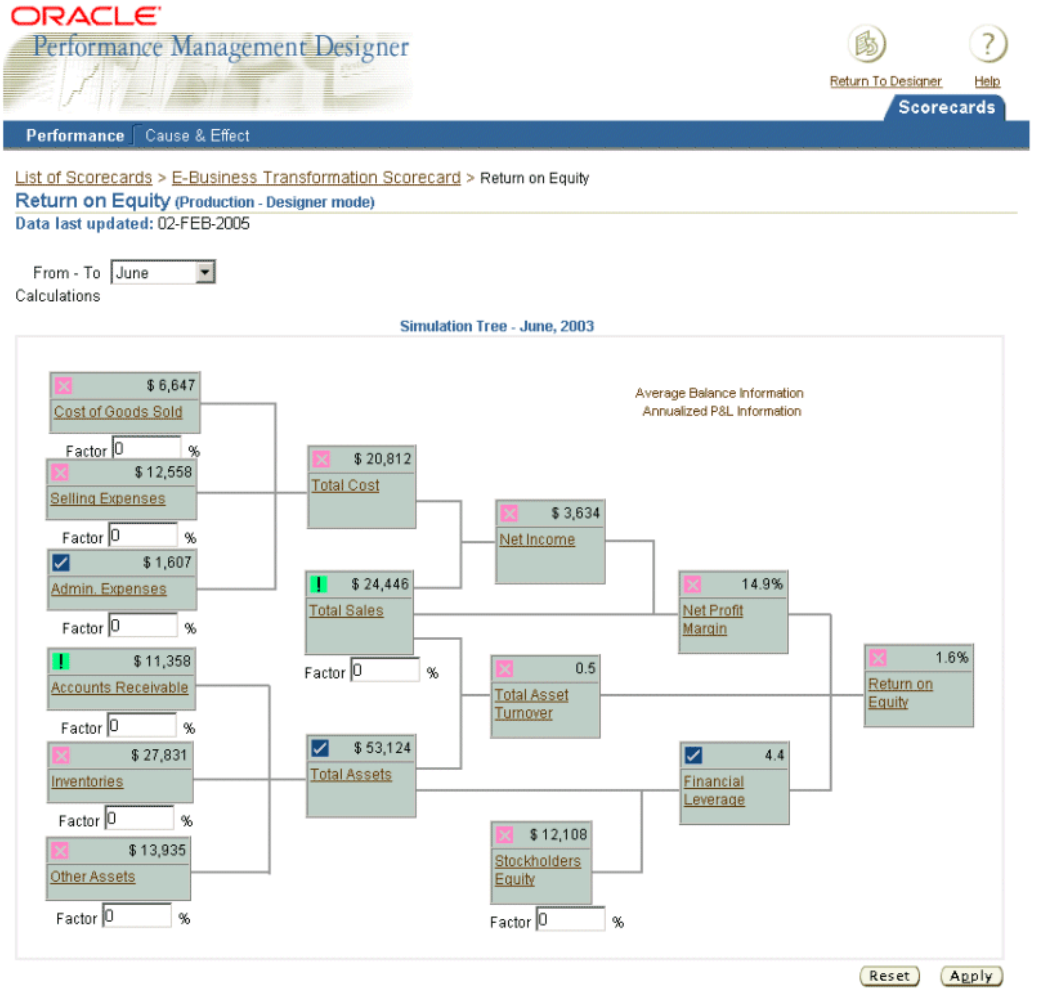
Other Display Options

In addition to trend or comparison graphs, you can view certain objectives using simulation trees, and profit and loss objectives.

Simulation Trees

A simulation tree lets you simulate objective performance by creating multiple "what-if" scenarios.

Simulation Tree



In the simulation tree example above, each box in the simulation tree represents a KPI that is driven by a formula or part of a formula. By increasing or decreasing a value in the formula, you can determine how that KPI affects other KPIs, and see how it affects performance.

You can reset values to their original state, print the results of different scenarios, however, you cannot save your simulation tree scenarios.

You can drill to a trend graph for each KPI by clicking on the KPI.

Profit and Loss Bar Chart

Profit and Loss bar chart shows how financial accounts contribute to a net account, such as Net Profit or Net Income.

Profit and Loss Bar Chart

In the profit and loss example above, each floating bar represents a financial account and the value range for each account is displayed. The chart starts with the main income account, then for each account that contributes to the net income, the floating bars move up or down depending on whether the account represents a profit or loss. You can change the KPI options to see how different options affect your accounts.

You drill to a trend graph for each account by clicking on the account.

Table

The table displays a maximum of 12 periods, regardless of the period selected. For example, if the period is Week, only 12 weeks are displayed, instead of 52. You can click Show Full Table to view the complete set of periods. The scorecard designer determines the default number of periods displayed.

Click on a value in the table to view the comparison graph.

Cause and Effect Matrix

The Cause and Effect matrix shows how objectives relate to one another.

Cause and Effect Matrix

Cause objectives are objectives that directly or indirectly affect the performance of a reference objective. Effect objectives are the ones that directly or indirectly are affected by the reference objective. The relationship between cause and effect objectives is defined by the scorecard designer, and should reflect your organization's strategic goals.

Information

Additional information can be provided by the scorecard designer for each objective:

- **Definition**

  Description of the objective, why it is important, and what drives its performance.

- **Formulas**

  Description of the formulas used to calculate performance and how to interpret the formulas.

  It is a good idea to include administrative details about how the objectives roll-up from period to period, or about how values are aggregated.

- **Strategy**

  Description of how the objective relates to your company's strategy, possibly including details on cause and effect.

- **Action Items**

  Actions necessary for the objective to be successful. This should provide information on the due date, budget, resources assigned, and status information for each action item.

- **Objective Owner**

  The person responsible for the objective performance. This section may also provide details on the expected duties and responsibilities of the objective owner. Generally, there is one owner for each objective.

- **Related Links**

  List of related links for the objective. For example, a link to a presentation or corporate website.

- **Alarms**

  Information on the alarm triggers for the objective.

Generally, these information categories are not updated frequently. The scorecard administrator or scorecard designer is generally responsible for changing this information.

Assessments

The objective owner can use this window to enter qualitative assessments relating to the performance of an objective. Assessments should complement the quantitative information provided in the form of plan data, actual data, and triggered alarm colors.

For example, an assessment can provide an explanation of why an objective under-performed, or why its performance is considered acceptable even if a quantitative measurement suggests otherwise.

Assessments are labeled with the owner's name and date. You can optionally specify the period, if your assessment refers to a specific period.

Users who are not the objective owner should use the Collaboration window to enter qualitative information on performance.

Collaboration

Any user with access to an objective can use the Collaboration window to enter qualitative information about an objective. Collaborative comments are particularly useful if several users have access to the same objectives, or when the same objective appears on multiple scorecards.

A collaborative comment can include recommended performance improvements, explanations of performance, or any other feedback.

Each comment is labeled with the user's name and date. You can optionally specify the period for the comment, if your comment refers to a specific period.

Printing

When you print a scorecard view or KPI report, the content of the view or report is automatically optimized for printing by removing any unnecessary headers and footers. You can additionally optimize the page format using your web browser's print options.

The following print options are available:

- **Printable Page**: Generates a printer-friendly version of a scorecard view or objective report.
- **Print Graph:** Generates a printer-friendly version of the graph on the objective report.
- **Print Table:** Generates a printer-friendly version of the table on the objective report.

Exporting to Excel

You can export data from the objective report to Microsoft Excel for analysis and reporting purposes. You can also import Microsoft Excel spreadsheets into Oracle Balanced Scorecard.

To use this feature, the scorecard designer must enable the Export to Excel feature for the objective.

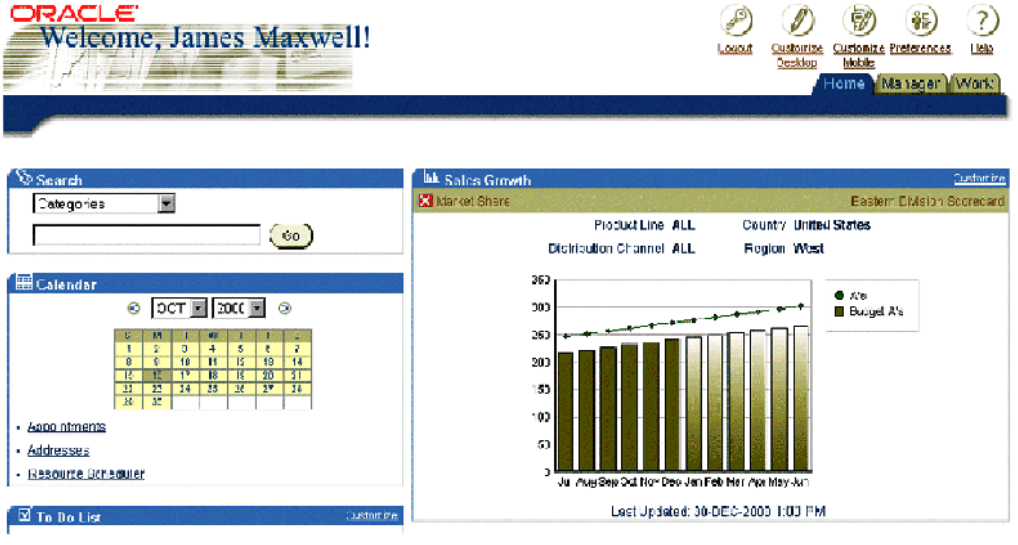
When you export data, all of the actual and projected data for that objective and all of the objective options that are selected, are exported.

> **Note:** To avoid performance problems, it is strongly recommended that you limit the options selected for export.

Balanced Scorecard Portlets

You can add one or more of the Balanced Scorecard portlets to your Personal Home Page or Portal: Indicator Graph Portlet, List of Indicators Portlet, and Custom View Portlet. These portlets are described below.

Indicator Graph Portlet



Indicator Graph Portlet

Use the Indicator Graph portlet to display the alarm and graph for any objective. This portlet only displays the default analysis options for the objective.

You can click on the objective name to view the complete report where you can change the analysis options. You can also click on the scorecard name to view the scorecard that the objective belongs to.

You cannot use the Indicator Graph portlet to display a simulation tree for an objective.

List of Indicators Portlet

Use the List of Indicators portlet to display a list of critical objectives for a particular scorecard. The status for each objective is shown using the alarm. You can also use this portlet to display an additional column, to group the objectives into perspectives or

other organized groups, or to view the Actual, Plan, Variation, and Percent of Plan of data for each KPI.

From this portlet, you can click on the scorecard name to view the scorecard or click on an objective to view the objective report.

Custom View Portlet

Custom View Portlet

Use the Custom View portlet to display any custom view as a portlet.

> **Note:** Because the Custom View portlet does not validate the size of the view, check with the scorecard designer to ensure that the view is the appropriate size for portlets.