



ORACLE® HYPERION PERFORMANCE
SCORECARD, FUSION EDITION

RELEASE 11.1.1

NEW FEATURES GUIDE

ORACLE®
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

Welcome to Oracle Hyperion Performance Scorecard, Fusion Edition 11.1.1. This document describes the tools introduced in this release and the enhancements made to existing tools.

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EPM Workspace Integration

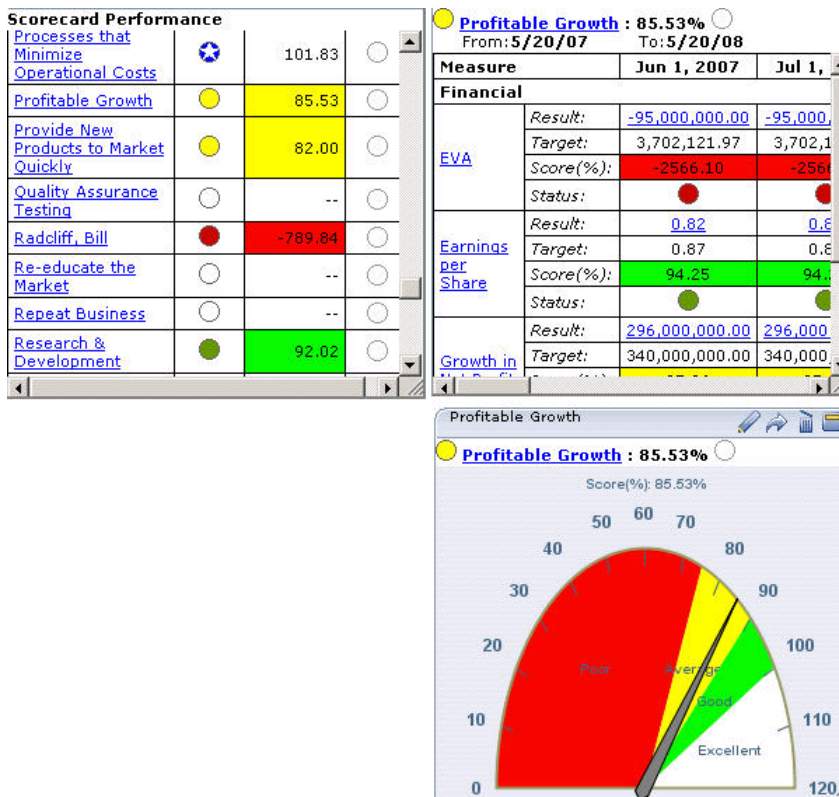
Performance Scorecard is now a fully integrated component of the Oracle Hyperion Enterprise Performance Management System System 9 platform suite and accessible from Oracle Enterprise Performance Management Workspace, Fusion Edition. This enables you to perform these tasks:

- Seamlessly access all most Oracle Hyperion product module applications in a cohesive and dynamic environment. To quickly locate product or application specific data, you can perform basic and advanced searches. See “Search” on page 3.
- Build EPM Workspace pages to build custom views that can contain a variety of Performance Scorecard and other Oracle Hyperion BI product data. See “EPM Workspace Pages” on page 2.

EPM Workspace Pages

Build EPM Workspace pages to build custom views that can contain a variety of Performance Scorecard and other Oracle Hyperion BI product data. For example, you can generate pages that display Performance Scorecard scorecards, Oracle Hyperion Planning, Fusion Edition data, and Oracle Hyperion Financial Management, Fusion Edition data on the layout of your choice. Build pages by dragging and dropping strategy details, business area details, measure data, scorecards, and a wide variety of report data. For example, the following sample presents views of scorecard performance in both report and graphical formats.




Figure 1 Sample EPM Workspace Page



You can building pages using the following Performance Scorecard data, in addition to any report from the Workspace Foundation repository:

- Employee scorecards
- Strategy element and accountability element scorecards
- Measures and dimensional measures
- Any report from the Workspace Foundation repository
- Active Alert Report
- Initiative Status Report
- Employee Profile Report
- Measure Performance Report
- Scorecard Performance Report

You can perform these tasks on EPM Workspace pages:

- Access more data about measures, scorecards, employees, and initiatives by selecting them or clicking the Launch To Scorecard button, . The object opens in Performance Scorecard.
- Open Webpages or portals displayed in Workspace pages, by selecting them.
- Modify the information displayed and the format in which it displays, by clicking the Edit button, .
- Remove objects from Workspace pages by clicking the Remove button, .

Search

You can search for and retrieve documents, reports, and dashboards from any repository in EPM Workspace. The search operation returns a list of results based on locating the users keywords in document-specific metadata; for example, document name, date created, and file type. You can perform these types of searches:

- General—Search keywords in any part of all supported content published in EPM Workspace
- Advanced—Search by date, date range, location, and priority.
- Context-sensitive—Search keywords associated with specific aspects of some content in all supported content published in EPM Workspace
- Within hierarchies—General or context-sensitive searches restricted to selected branches of EPM Workspace or to selected repositories
- Data or metadata—If content is static, both metadata and data is indexed (for example, filter name and selected values for the filter). If content is dynamic, then only metadata is indexed (for example, column name only).

Search results display as follows:

- Categorized based on content type, modified date, and file locations within EPM Workspace
- Sorted by relevance or by modified date
- Authorized; user credentials ensure that only user-authorized content authorized is returned

By default, results are sorted by score determined by how many times the keyword appears in the document and how many other keywords are in the document.

Unified Help

Unified Online Help Online help in Workspace is now presented in a unified User Interface providing access to help systems for all registered products in the Workspace web application. You can search across help systems and filter searches by product and by guide type. You can also navigate from one help system to another using the drop down lists in the Index and Table of Contents.

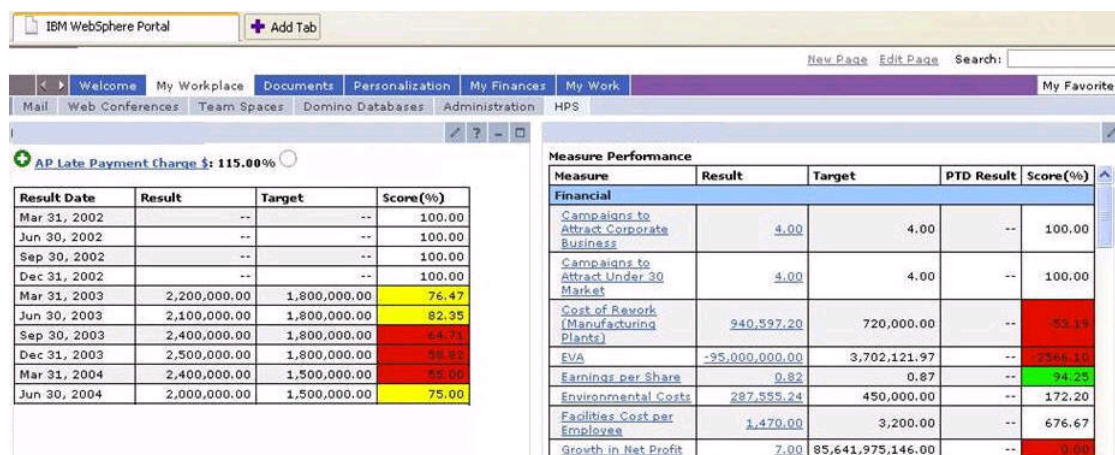
Industry Standard Portlet Pages

You can now create portlet pages that provide access to specific Performance Scorecard data, from these industry-standard portals:

- Oracle
- SAP NetWeaver Enterprise Portal
- IBM WebSphere 6.0
- BEA WebLogic
- Microsoft SharePoint Server

Portlets enable you to display, investigate, and render key data that you specify in a portlet environment. Although you launch into Performance Scorecard to access data, you cannot modify this data. Create portlets that allow you to access detailed information about key metrics such as current and previous measure scores and results, from high-level entry points such as the Measure Performance Report. For example, you can create a portlet like the following from which you can access more information about the AP Late Payment Charge measure from its Trending table. Similarly, you could can a portlet from which you can access details such as associated employees, and the ranges that evaluate measure performance for measures on the Measure Performance Report.

Figure 2 Sample Portlet Page



You build portlet pages in Edit Mode by clicking **Add Content** to specify the data to include. While this enables you identify the content to display and how to render it, you cannot modify data. You can use this data on portlet pages:

- The following information for strategy element, accountability element, and employee scorecards:
 - All components such as measures and lower-level scorecards
 - Historic trend data
 - Values and performance chart
 - Annotations and initiatives
- The following measure data including:
 - Historic trend data
 - Values and performance chart
 - Annotations
- Measure Performance Report
- Scorecard Performance Report content
- Initiative Status Report
- Employee Details Report

See the *Oracle Hyperion Portal Integration Toolkit Setup Guide*.

Target Enhancements

These target-related changes have been made:

- Support for multivalued targets
- Ability to define different result and target frequencies
- Simultaneous target and result entry

Multivalued Targets

You can now set up targets to have multiple values for a given date. These targets are called multivalued. For example, a target could be defined to have a high and low value.

This enables you to more meaningfully evaluate measure performance using subtargets that represent thresholds and tolerances. In previous releases, if you evaluated measure performance using targets, you could only a single value which did not provide the flexibility useful to assess performance using more than one value. For example, if you created a measure that monitors lost shipments called Rate of Lost Shipments and a target called Normal with a value of 5% to evaluate this data, a score of 5.1% or 4.9% meant that you were off target because there were no tolerances. You can now eliminate the inflexible boundaries for the Normal target values by making it multivalued, and specifying these subtargets that represent value thresholds

- Normal—high = 5.5%
- Normal—low = 4.5%

This enables you now express normal performance using a range of different values. You can create complex formulas for subtargets and use sub-target values in other object formulas using the `mSubTarget` function. See Chapter 6 of the *Oracle Hyperion Performance Scorecard, Fusion Edition User Guide*.

Evaluating Performance Using Multiple Targets

You can now calculate measure and scorecard scores and status level using multiple targets on these reports:

- Scorecard Details
- Measure Performance
- Measure Details Trend Table tab
- Measure Details Chart tab

Customize each report to specify the targets that you want to use to assess performance. See Chapter 13 in the *Oracle Hyperion Performance Scorecard, Fusion Edition User Guide*.

Differing Target and Result Frequencies

Measure results and target values are often collected at a different times determined by different frequencies. For example, you enter results monthly but establish targets annually. You can now specify a frequency for the collection of target values that is different than that for result collection. You can assign these target frequencies:

- Target Collection — Creates list of dates by which target values are expected to be entered or available.
- Target Reporting — Creates a list of dates with which target values are associated, even if values were not entered during that period of time. For example, assume that a company creates a measure called Sales to track the amount of money made each month on sales. To avoid overlapping with other months, the Sales measure could have a reporting frequency

of monthly, with a period of the last day. This ensures that sale figures for the month of January, for example, only display in January and not February. If sale figures are not available in January, but usually by the middle of the following month (February), a collection frequency specifying the 15th of every month can be used. This enables you to ensure that the context of target data is maintained.

Application and generic domain designers can apply these frequencies to all application measures without explicitly defined frequencies. See Chapters 6 and 9 of the *Oracle Hyperion Performance Scorecard, Fusion Edition User Guide*.

Simultaneous Target and Result Entry

To more quickly and conveniently update and enter measure data, Result Collectors and Target Setters can enter new or missing results and targets (single and multivalued) at the same time using the Results & Targets tab of a Measure Detail Report. If you use Essbase as an external data source, period-to-date result values are written to the Essbase database.

The dates for which authorized users can enter targets are determined by the target collection frequency. To only display and enter data for missing results and targets, select **Only Display Uncollected**. To only display missing results and target values that are manually entered and not calculated by formulas, select **Hide Calculated Values**.

See Chapter 13 of the *Oracle Hyperion Performance Scorecard, Fusion Edition User Guide*.

Period-To-Date Results

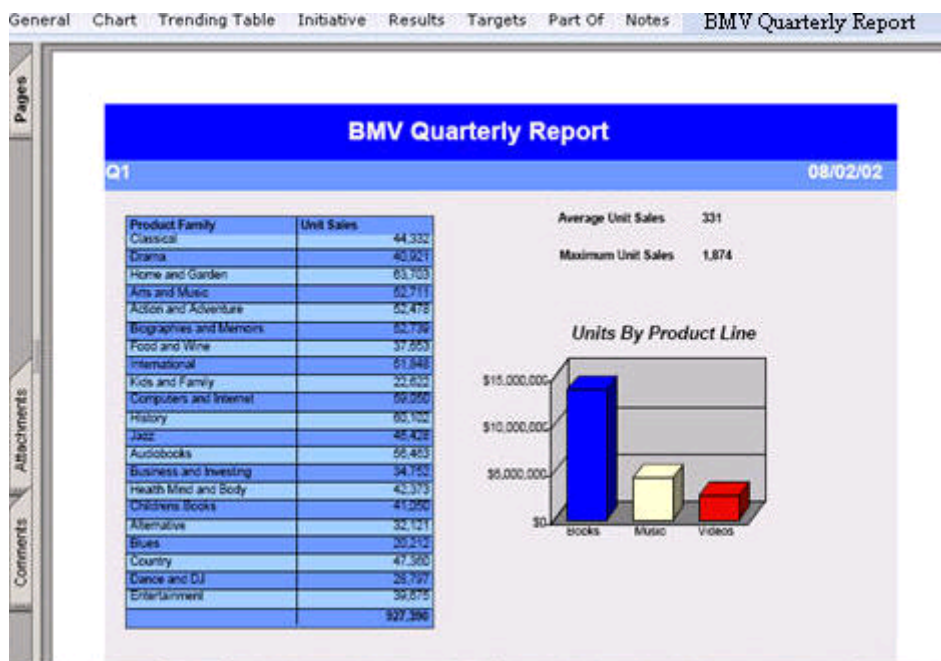
Authorized users and result collectors can now enter period-to-date (PTD) results using Result Collection and Measure Detail Reports. Results entered override those calculated using a formula or function. Implement PTD results in formulas by using the `mPTDResult` function. This enables you to perform computations on PTD result data and use these results in other formulas. `mPTDResult` will use any period-to-date value that you manually enter from a report. See Appendix A of the *Oracle Hyperion Performance Scorecard, Fusion Edition User Guide*.

Measure Reporting Enhancements

You can customize Measure Detail Reports as follows:

- Embed custom reports — You can now display your own reports pertaining to measures in individual tabs on the Measure Details Report. In the following example a PDF file containing a quarterly report has been embedded:

Figure 3 Embedded Custom Report



- Replacing tabs — You can substitute the tabs on Measure Detail Reports with your own reports. This enables you to fully personalize the report using custom data. To replace tabs, name the replacement report using the default tab key.
- Consistent display of trend data — Trend data, showing previous measure results and scores now displays in the same format as trend data for scorecards. Measures and expanded composite measures are listed vertically, enabling you to more easily display and review all measure trend data.

See Chapters 6 and 13 of the *Oracle Hyperion Performance Scorecard, Fusion Edition User Guide*.

Attachment and Page Links

To make adding attachment links to external reports easier, you can copy attachment links by right-clicking the link and selecting **Copy Link** from the context menu. Paste the link in the Report URL field for the external report to load a link to the attachment.

You can also create links to the current Performance Scorecard page that you can paste into other applications such as Microsoft Outlook. This enables you to link back to the Performance Scorecard page from the external application. If the application in which you embed the link adds an SSO token to the link, you need not log on to Performance Scorecard. Otherwise, log on to Performance Scorecard to display the linked page. To create links to Performance Scorecard pages, select **Edit**, then **Copy Link**.

User Interface Improvements

In addition to more intuitive display of data on the Object and Browser view, and the ability to filter by performance level and domain, these general user interaction improvements have been made:

- Consistent drill-down and object expansion on the Browser View and reports. You can access detailed data as follows:
 - Drill-down on dimensional measures
 - Expand composite measures to show their children
 - Expand composite measures to drill down on related scorecards
 - Expand scorecards to display its constituent measures and scorecards on which you can drill down
 - Expand initiatives to shown sub-initiatives
- Consistent context menu on Browser View that enable you to navigate, edit and if authorized, delete measures, scorecards, and reports. Authorized users can also delete objects using the context menu.
- Consistent context menu on Object View that enables you to edit, copy, and if authorized, delete objects.
- Column re-sizing on all reports except Measure and Scorecard Trending Tables.

Domain and Performance Level Filters

You can sort data on the Browser View as follows:

- By domains that represent geographic or functional areas. This enables you to display only the maps, measures, scorecards, initiatives and employee associated with a particular domain, such as a Marketing department, providing a context or business-specific approach to application data and group data for hierarchical navigation. To display data by a domain, select it from the **Domain** list below the toolbar.

To arrange maps, employees, and initiatives by domain, right-click their explorer folders and select **Group by Domain**.

If element are used on multiple maps, maps display in any domain in which at east one of its elements is associated.

To display employees by manager to represent the reporting hierarchy, right-click the employee and select **Group by Manager**.

- By performance level using the **Status** list below the toolbar. For example, to identify the measures, accountability elements, strategy elements, and initiatives at risk and that require analysis or increased effort, select the poor performance indicator from the **Status** list.

Use the Domain and Status lists to change the data shown on these reports:

- Measure Performance
- Scorecard Performance

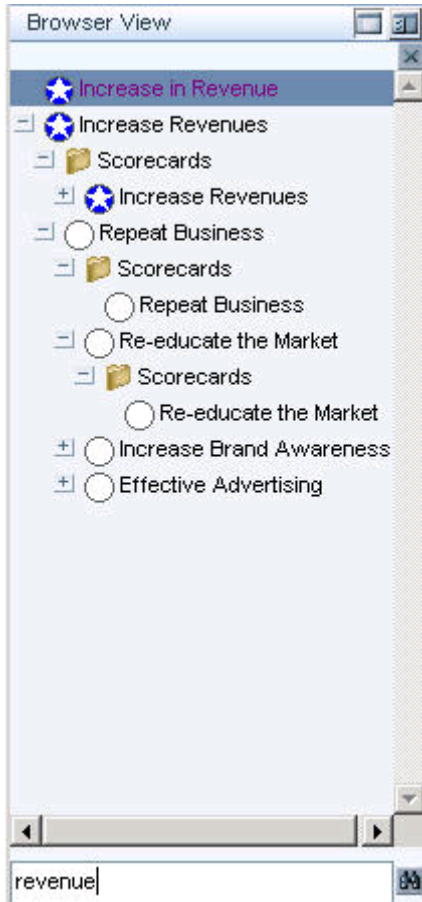
- Employee Profile
- Initiative Status
- Map Strategy

Lookup and Search

You can locate and display Performance Scorecard data as follows

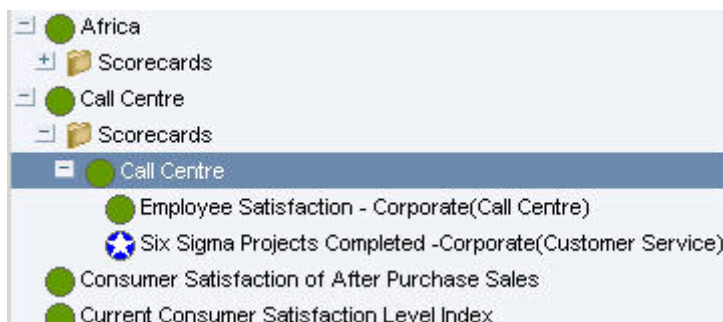
- Using global search from another application open in Oracle Enterprise Performance Management Workspace, Fusion Edition—Enter the criteria in the **Search** box in the right of the toolbar. You can perform a basic search by name, or select **Advanced Search** to search by date, location, and so on. For information see Chapter 4 of the *Oracle Hyperion EPM Workspace User Guide*
- In Performance Scorecard—To look up employees, strategy elements, accountability elements, measures, and variables, alerts, and reports, enter their name in the bottom left **Search** box on the Browser View. The data returned is displayed relative to its use in the application hierarchy. For example, entering Revenue returns all objects, such as measures, with name starting with “Revenue” in relation to their use in the application, such as scorecard association.

Figure 4 Lookup Results



You can also look up and display objects by performance status. For example, entering “good” displays all objects, that currently have a high performance level, such as the measures and scorecards in the following sample:

Figure 5 Lookup By Performance Level



Import/Export Utility Updates

These changes have been made to the Import/Export Utility that enable you to load data to or export data from Performance Scorecard:

- Measure Metadata — Supports multivalue targets and multiple target frequencies.
- Target Metadata — Supports targets with multiple values (subtargets). To import or export multivalue targets you must specify the parent target and the number of subtargets.
- Add Named Ranges to Measure Template — Enables you to load a custom range to a template to generate dimensional measures.
- Dimension and Dimension Member — Enables you to import and export custom dimensions and members from a supported external data source.

See Appendix C of the *Oracle Hyperion Performance Scorecard, Fusion Edition Administrator's Guide*.

Administration

Data Migration Using Life Cycle Management

Life Cycle Management (LCM) enables you to copy the following product data across different environments and operating systems:

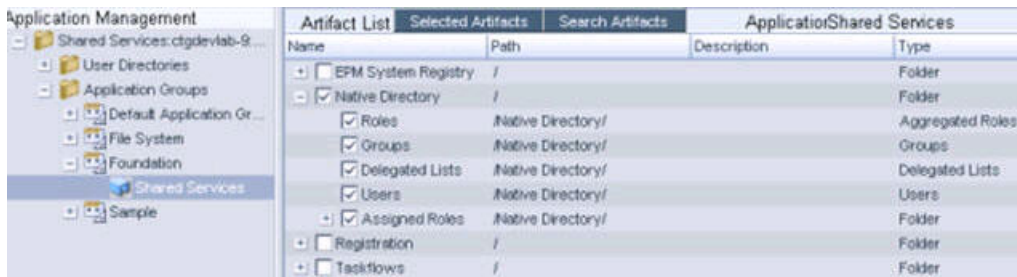
- Entire applications
- Data repositories such as the Oracle's Hyperion® Shared Services registry and cubes
- Individual artifacts such as scripts, data forms, and rule files

Use LCM to perform these tasks:

- Repeatedly promote all artifacts from one Performance Scorecard application to another
- Promote only specific artifacts
- Promote imported artifacts to a file system
- Export promoted artifacts to a file system
- Promote multiple applications

You can use LCM from Shared Services or from a command-line utility. The following sample depicts how you select the product application artifacts and data that you want to migrate from Shared Services. See the *Oracle Hyperion Enterprise Performance Management Lifecycle Management Guide*.

Figure 6 Pre-Migration Artifact Selection



To only promote artifacts that have changed since a previous promotion or those that were deleted from an application, use Oracle Hyperion Performance Scorecard, Fusion Edition promotion. See Chapter 5 of the *Oracle Hyperion Performance Scorecard, Fusion Edition Administrators Guide*.

User and Group Account Management

All user account management and authentication is now performed in Oracle's Hyperion® Shared Services. If you are a new user, create, provision, and manage all accounts in Shared Services as described in this guide. You can provision users as follows:

- Using the security roles provided by Shared Services.
- Using custom domains you create in Performance Scorecard to represent geographically or functionally distinct areas in your organization. This determines the data users can access.
- Using custom security roles that you create in Performance Scorecard that determine the scorecards, measures, initiatives, and reports users can access.

See the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

If you upgraded to this release, perform any of these steps required to support your existing authorization setup:

- Transfer existing accounts not yet available in Shared Services, by performing a one-time migration.
- Create a list that identifies the accounts that you must create in Shared Services to accommodate Performance Scorecard employees, perform a Synchronize User Accounts With Employees command.
- To perform a bulk synchronization between users and groups provisioned with Performance Scorecard roles in Shared Services against those provisioned in Performance Scorecard, perform a Synchronize Security With Shared Services command.

See Chapter 2 of the *Oracle Hyperion Performance Scorecard—Fusion Edition Administrator's Guide*.

Common Logging

Performance Scorecard supports the following logging enhancements:

- Aspect-based messages relating to system-wide components such as databases, security, promotion, and auditing
- Logs written to a central location for ease of debugging and auditing
- Ability for audit-type messages to be localize at view time instead of at generation.

These settings are defined in the Common Logging section of the HPSCconfig.properties file. If you do not want to use common logging, see Appendix A in the *Oracle Hyperion Performance Scorecard, Fusion Edition Administrator's Guide*.

Installation and Configuration

The new Oracle Hyperion Enterprise Performance Management System Installer, Fusion Edition and Oracle's Hyperion Enterprise Performance Management System Configurator provide a streamlined and simplified approach to product installation, upgrade, and configuration. Oracle's Hyperion Enterprise Performance Management System Configurator uses the new Oracle's Hyperion Shared Services Registry, which simplifies product configuration by storing and re-using configuration information. Oracle's Hyperion Enterprise Performance Management System Diagnostics confirms that product components were successfully installed, configured, and are up and running. The reorganized installation and configuration documentation set reduces the number of installation guides and makes it easier to find the information you need. Individual product installation guides are replaced by the following guides:

- *Oracle Hyperion Enterprise Performance Management System Installation Start Here*
- *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*
- *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*

Additional and supplementary information can also be found in these guides:

- *Oracle Hyperion Enterprise Performance Management System Manual Deployment Guide*
- *Oracle Hyperion Enterprise Performance Management System High Availability Guide*
- *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*
- *Oracle Hyperion Enterprise Performance Management System Backup and Recovery Guide*
- *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*
- *Oracle Hyperion Enterprise Performance Management System SSL Configuration Guide*

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