Performance Scorecard User Guide, 11.1.2

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Part I

Building Applications to Define and Evaluate Strategy

In Building Applications to Define and Evaluate Strategy:

- About Performance Scorecard
- Getting Started
- Using Performance Management Frameworks
- Working with Employees
- Using Maps
- Using Measures
- Using Dimensional Data
- Creating Scorecards
- Specifying Preferences
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Performance Scorecard

Oracle Hyperion Performance Scorecard, Fusion Edition enables you to define, evaluate, and refine corporate and departmental strategy to adapt to changing business requirements. Use Performance Scorecard to perform these tasks:

- Depict and evolve corporate and departmental strategy and accountability structures by performing these tasks:
  - Use an industry-recognized performance management framework that identifies the role of areas such as customer focus, that are key to your organization.
  - Create strategy trees that show how high level strategic goals translate into processes and actions.
  - Assign employees to a strategic goal or action.
  - Create Accountability maps that represent the reporting hierarchy.

- Evaluate the performance of strategy elements, business areas, and employees by performing these tasks:
  - Creating measures that quantify data that is critical to the health of your organization such as internal costs or net profit.
  - Creating scorecards that evaluate the progress of individual employees, strategy elements, and accountability elements.

- Monitor and react to performance changes by performing these tasks:
  - Subscribing to alerts that notify you when the performance of key business objects depart from an acceptable range.
  - Generating reports that reflect the progress of strategy initiatives, accountability elements, and employees.

Key Concepts

These topics describe the underlying concepts of Performance Scorecard:

- “Business Objects” on page 20
- “Applications” on page 20
- “Domains” on page 20

Business Objects

The items you create in Performance Scorecard, such as strategy elements and measures are called business objects. Business objects enable you perform different tasks. For example, you build strategy trees that represent corporate or departmental strategy by first creating and then organizing strategy elements. Similarly, to create scorecards to assess the performance of employees, accountability teams, and strategy elements, you must first create the measures to use on these scorecards.

The interaction of business objects is called an application. Changes to business objects are recorded in the Audit Report that an administrator can access.

See “Business Objects” on page 20.

Oracle recommends that you create business objects in the sequence identified in “Building Applications” on page 25.

Applications

An application is a concept that refers to how business objects work together to form strategy, accountability, and scorecard structures. Since an application is a concept, you cannot open, create, or delete applications.

If your organization is large, have multiple application designers create applications for each distinct corporate area, or domain.

Domains

You can organize business objects such as employees and maps by domains that represent distinct departments or locations in your organization. For example, to create an application for the Human Resources department, have an administrator create a Human Resources domain with which you can associate these objects:

- Employees and their scorecards
- Measures
For information about creating domains, see the Oracle Hyperion Performance Scorecard
Administrator’s Guide.

**Business Objects**

This topic describes how to use these business objects:

- “Employees” on page 21
- “Frameworks” on page 21
- “Maps and Strategy Trees” on page 22
- “Measures” on page 23
- “Dimensional Outlines and Dimensional Measures” on page 23
- “Scorecards” on page 24
- “Alerts” on page 24

**Employees**

Employees usually represent any Performance Scorecard user that is responsible for performing
tasks related to the objects with which they are associated, such as entering measure results,
working on strategy elements, and creating scorecards. Administrators create user accounts for
employees to which they apply these settings to grant access to data:

- Domain: Functional or geographic area in which employees work such as a department or
  office.
- Security role: Set of permissions that determine the scorecards, measures, initiatives and
  reports employees can view.

  **Tip:** To enable users to automatically access the measures, scorecards, and initiatives in their
domain, administrators must assign the **generic designer** security role. See the Oracle
Hyperion Performance Scorecard Administrator’s Guide.

**Frameworks**

Frameworks are business methodologies such as the Balanced Scorecard, that identify the
importance of business areas that are fundamental to most organizations.

Use frameworks to logically group measures that relate to each area. You can also use frameworks
as the basis of strategy since they enable you to group related strategy goals, elements, and actions.
You can use the frameworks Performance Scorecard provides, or customize one of these frameworks to suit your needs. See “Using Performance Management Frameworks” on page 39.

Maps and Strategy Trees

Depict the strategy and accountability structures in your organization by creating these objects:

- Strategy Trees that identify the individual components, strategy elements, that form corporate and departmental strategy. See “Strategy Trees” on page 22.
- Strategy maps that depict how strategy elements connect to achieve corporate and departmental strategy. See “Strategy Maps” on page 22.
- Accountability maps that identify corporate or departmental reporting structures. See “Accountability Maps” on page 22.

If you use domains to represent departments or offices with individual Strategy maps and Strategy Trees, you can link these items to represent a cohesive whole. See “Linking Maps” on page 69.

Strategy Trees

Identifying and articulating strategic goals for all levels of your organization is central to performance management. Without a central, comprehensive, and communicated strategy, your organization is not properly positioned to achieve or reevaluate its goals.

After creating a Strategy Tree that translates high-level strategic goals into processes and actions (strategy elements), assign the responsible employees. This enables employees to understand how their roles contribute to levels of corporate strategy. See “About Creating Strategy Trees” on page 60.

Accountability Maps

Use Accountability maps to represent the reporting structure of these business areas (accountability elements):

- Departments
- Task forces and committees
- Individual employees

See “Creating Accountability Maps ” on page 62.

Strategy Maps

Strategy maps illustrate how perspectives and strategy elements interact to support the corporate or domain strategy. Links between elements on a Strategy map indicate how changes to one
element affect others. This enables you to anticipate and adjust to strategy changes. See “About Creating Strategy Maps” on page 64.

**Measures**

Measures enable you to collect objective, quantifiable data that indicates progress toward a performance or strategy target. For example, if one strategic goal is improved product quality, you could create measures called “number of product returns” or “poor customer satisfaction”. These measures would reflect product quality by identifying the number of product returns and dissatisfied customers.

Use measures to evaluate and monitor the progress of these objects:

- Individual or groups of employees
- Strategic objectives and other strategy elements
- Other logically-grouped scorecards

You assign employees to measures to perform tasks such as entering results and defining targets. You can use data from an Oracle Essbase database to create dimensional measures. See “Using Measures” on page 71.

**Dimensional Outlines and Dimensional Measures**

Dimensions are hierarchical categories that you can create to organize measures. They enable you to perform these tasks:

- Analyze measures by groups, such as products, distribution channels, and geographic areas. For example, a dimension called Geography could group measures for North America, Europe, and Australia.
- Generate dimensional measures that collect data where measures intersect, such as sales by region.
- Generate a multidimensional Essbase database of application data. See the Oracle Hyperion Performance Scorecard Administrator’s Guide.
- Generate application data to an external data source for use with other Hyperion products.

Performance Scorecard automatically creates a dimensional outline that represent the strategy and accountability hierarchies you define when you create these objects:

- Strategy elements
- Accountability elements
- Employees

Each of these items is represented by a *system dimension* and member. The default dimensional outline enables you to perform these tasks:
Generate dimensional measures based on Strategy Trees and Accountability maps.

Select the members to use when you create scorecards that evaluate performance using dimensional measures. Only dimensional measures for the members you choose are used in scorecard calculations.

Select which members to use in dimensional measure generation using the member picker.

**Scorecards**

Scorecards enable you to evaluate and track the performance of these objects:

- Accountability elements, such as departments and committees
- Strategy elements, such as strategic objectives
- Other Employees

The performance status of these objects is determined by adding the measures that track their progress to their scorecards. The scores each measure achieves is evaluated by a range that corresponds to a performance indicator, that graphically reflects performance levels.

Managers create scorecards for the employees that report to them. These scorecards are primary scorecards.

The other scorecards that you can create to assess and monitor the measures, strategy goals, and business areas with which you work are called secondary scorecards. See “Creating Scorecards” on page 99.

To evaluate performance across an organization or department using common criteria, use scorecard templates. Assign a scorecard template to new scorecards to place the measures and scorecards on the template to the new scorecards. Lock scorecard templates to prevent others from adding to, or changing, the components scorecards inherit from a scorecard template.

**Alerts**

Alerts notify you by E-mail when the performance of business objects departs from an acceptable range that you define. Create alerts to monitor the performance of these objects:

- Measures
- Scorecards
- Employees
- Strategy and Accountability elements

Alerts also prompt you when tasks such as measure result collection are approaching, due, or overdue.

Designers, or users with the designer security role, can create public alerts to which others can subscribe.

See Chapter 10, “Using Initiatives”.

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Initiatives

Initiatives are individual or related tasks that must be completed within a certain period of time, such as project milestones. You can associate initiatives with measures, strategy elements, and accountability elements. As initiatives progress, update their status (such as partially complete) to reflect the performance and position of the factors involved. You can create a composite initiative view that identifies all the objects and elements involved in an initiative. This enables you to identify potential issues and obtain a more comprehensive understanding of the initiative because you can examine all the factors involved.

Initiatives are contextual and associated with a reporting period, such as a sales event, during which annotations can be used. You can group initiatives logically using categories. Administrators can specify the tasks users can perform with initiatives, such as creating and deleting.

Working With Business Objects

These topics describe the rules that you must follow when you create business objects:

- “Building Applications” on page 25
- “Naming Conventions” on page 25
- “Duplicate Business Objects” on page 26
- “Locked Business Objects” on page 26

Building Applications

Create business objects in this order to develop applications:

1. Frameworks
2. Employees
3. Measures
4. Accountability elements
5. Strategy elements and Strategy Trees
6. Strategy Maps
7. Scorecard Templates
8. Scorecards

Naming Conventions

Give business objects of the same type a unique name. For example, a scorecard and target can have the same name, but not two targets.

Do not use characters that are illegal for these components in business object names:
Essbase

The relational database that you are using

See “Restricted Dimensions, Members, and Alias Characters” on page 197.

Business object names are not case-sensitive. Consequently, a measure called NetProfit and another measure called netprofit are considered the same.

Duplicate Business Objects

If you use an upgraded database, business objects with the same name are appended. For example, if three measures called SalesSingapore exist, the last two measures are renamed as SalesSingapore1 and SalesSingapore2. These measures would then exist:

SalesSingapore
SalesSingapore1
SalesSingapore2

Locked Business Objects

Business objects become locked, meaning that you can not modify them, in these circumstances:

- The collection extension for a measure has elapsed.
  
  This means that results cannot be entered or modified. To enter results after the collection extension has expired, ask your administrator to remove the Result Collection Admin restriction from your user account.

- When another user is editing the business object.
  
  This prevents overwriting. You must wait until the user is finished.

  **Tip:** If you think a business object is incorrectly locked, ask your administrator to break the lock using the Locked Business Object Report.

Ways of Working in Performance Scorecard

The tasks that you can perform and the data that you can access are determined by the security role assigned to your account. Although administrators can create security roles, Performance Scorecard provides the following roles:

- **User:** Enables you to access and, if authorized, enter data using reports. Also enables you to use notes, initiatives, and alerts. Use the Browser View.

- **Designer:** Enables you to perform the tasks identified above, but also to build applications by creating and modify objects such as maps, measures, and scorecards, and to subscribe other users to alerts. You can use the Object and Browser Views.
• Generic Domain Designer — Enables you to perform the tasks identified above and create applications for functionally or geographically distinct areas in your organization represented by domains, such as departments or regional offices.

• Admin: Enables you to perform application management tasks such as defining custom security roles, migrating applications and application data, configuring external data sources, generating Essbase databases of application data and monitoring user activity. See the Oracle Hyperion Performance Scorecard Administrator’s Guide.
Getting Started

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Requirements

Based on your setup, an administrator must perform these tasks before you can use Performance Scorecard:

- For new users, administrators must perform these tasks:
  - Create and provision accounts in Oracle's Hyperion® Shared Services to which the user (Basic) or designer (Interactive) security role is assigned.
    See the Oracle Hyperion Enterprise Performance Management System Administration Security Guide
  - Synchronize Performance Scorecard and Shared Services. See the Oracle Hyperion Performance Scorecard Administrator’s Guide.

- For existing users, administrators must migrate accounts not set up in Shared Services, to Shared Services. See Chapter 2 of the Oracle Hyperion Performance Scorecard Administrator’s Guide.

Accessing Performance Scorecard


To access the Performance Scorecard:

1. Start Shared Services by selecting Start, then Programs, then Oracle EPM System, then Foundation Services, and then Start Shared Services.
2 Start and log on to EPM Workspace by selecting Start, then Programs, then Oracle EPM System, then Foundation Services, and then Workspace. See the *Oracle Hyperion Performance Management Workspace User Guide*.

3 Perform a task:
   - Select File, then Applications, and then Performance Scorecard.
   - Select Favorites, and then Performance Scorecard.

**Performance Scorecard in EPM Workspace**

Performance Scorecard contains two panes:
- The left View pane which contains the two view tabs that provide links to the data that you can create or access.
- The right Content pane which displays data based on the selections you make on the view tabs, from the menu bar, or from the Performance Scorecard tool bar.

Performance Scorecard includes these areas and tools:

---

Figure 1 Performance Scorecard in Workspace
1. Navigate menu at the top left that enables you to access common tools such as the impact manager and scheduler. See the *Oracle Hyperion Enterprise Performance Management Workspace User Guide*.

2. Menu bar and toolbar that enable you to perform common tasks in Workspace, but also Performance Scorecard-specific tasks.

3. Browser View that provides links to the data you can access, reports, and alerts. This view also contains a search that you can use to find data only within Performance Scorecard. See “Browser View” on page 34.

4. The Object View available only to designers, that displays the kinds of objects that you create to build applications such as employees, measures, maps, and scorecards. See “Object View” on page 33.

5. Domain and Status Filters on the Performance Scorecard toolbar that enable you to restrict the data displayed by domain and performance level.

6. Report Date list on the Performance Scorecard toolbar that enables you to select the date for data show on reports.

7. Report Target on the Performance Scorecard toolbar that contains all targets that you create. This list enables you to perform calculations using another target. The target selected is called the report target.

   To calculate and display measure or scorecard data using multiple targets on reports such as Measure Performance and Scorecard Performance, select Edit, then Customize, and select the targets to use. See Chapter 13, “Using Reports”.

8. Look up filter that enables you to find data only within a Performance Scorecard application and display it in the Browser View. For example, entering a measure name and clicking the Lookup icon, will display just that measure on the Browser view tab. See “Using Lookup and Search” on page 36.

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**Menus Commands**

This topic describes the Performance Scorecard-specific commands on these menus. For information about all other menus, see the *Oracle Hyperion Enterprise Performance Management Workspace User Guide*.

- “File” on page 32
- “Edit” on page 32
- “Scorecard Favorites” on page 32
- “Forum” on page 32
- “Help” on page 32

The Administration menu is available if you have the admin security role assigned to your account. See the *Oracle Hyperion Performance Scorecard Administrator’s Guide*. 
File
You can use these commands:

- Preferences—Specify personal preferences. See “Specifying Preferences” on page 107.
- Scorecard Configuration—Specify and optionally apply application-wide preferences such as score limit and frequency settings. See “Specifying Preferences” on page 107.
- Export to Excel—Make scorecard and measure data on reports available in Microsoft Excel.

Edit
You can use these commands:

- Copy—Copy data on Result Collection and Measure Result Reports.
- Copy Link—Create links to the current Performance Scorecard page that you can paste into other applications such as Microsoft Outlook. If the application in which you embed the link adds an SSO token, you need not log on to Performance Scorecard. Otherwise, log on to Performance Scorecard to display the linked page is displayed.
- Edit—Change business object setup data from reports. For example, you could change measure settings from the Measure Details Report.
- Customize—Modify the default content shown on reports, such as additional data or using multiple targets.

Scorecard Favorites
You can use these commands:

- Add current page—Bookmark a page as one of your favorites.
- Edit favorites—Change the order in which your favorites are displayed or their title.

Forum
You can use these commands:

- General—Create and reply to notes not pertaining to specific business objects.
- Search—Find forums with notes and annotations containing specific criteria.

See “About Notes ” on page 125.

Help
To access online help for all open product applications, select Help, and then Contents. To access context-specific help, select Help, and then Help on This Topic. For example, for help creating measures on the Measure Setup page, select Help and then Help on This Topic.
**Toolbar**

Use these Performance Scorecard-specific toolbar buttons to edit data, export data, and customize reports:

- Click the Export to Microsoft Excel button, ![Excel](image), to export some kinds of data to Microsoft Excel spreadsheet files.
- Click the Customize button, ![Customize](image), to modify the default data and settings of reports.
- Click the Edit button, ![Edit](image), to modify objects such as employees and measures from reports.

For information about other toolbar buttons, see the *Oracle Hyperion Enterprise Performance Management Workspace User Guide*.

**Object View**

The Object View tab, ![Object View](image), to the top right of the view pane lists all objects in the system, such as employees, maps and measures, organized for creation and modification. Objects are displayed hierarchically in folders and trees. You can work with objects as follows:

- Right-click and use the shortcut menu.
- Select objects to edit them.
- Select a folder and use the buttons on the list box that is displayed.

Based on your application, data is displayed as follows:

- Maps are organized by type, such as Accountability, in folders. Elements you create to build maps are displayed hierarchically below each map.
- Scorecards that monitor the performance of employees, strategy elements, and accountability elements display in Scorecard folders below each element, as shown:
If you use domains to represent distinct physical or functional areas within your organization, the objects in a domain are displayed in domain folders within object folders. For example, the measures in a Marketing domain display in a folder called Marketing in the Measure folder.

Composite measures used in other measure formulas are also shown by domain. Drilling down on a composite measure displays all children.

**Browser View**

The Browser View tab, to the left of the Object View, lists the objects in the system organized for viewing and reporting. It provides access to this data:

- The measures, maps, employees, alerts, and initiatives that you can view. Scorecards display below the objects that they evaluate. Select objects to view information. For example, selecting an initiative opens its Status Report, and selecting a measure opens a Details Report.

  If domains representing distinct areas in your organization are used, the objects in a domain are displayed in domain folders in the object explorer. For example, folders for the Marketing department domain display in map, employee, and measure folders.

- The reports that you will use to analyze and enter data. See Chapter 13, “Using Reports”.

- A search box that enables you to find data in Performance Scorecard applications. See “Using Lookup and Search” on page 36.
To organize data differently, see “Finding and Filtering Data” on page 36.

You can perform these tasks:

- Select objects to view information. For example, selecting a measure displays the Measure Details Report.
- Copy, edit, and delete objects by right-clicking and using the shortcut menu.

**Shortcut Menu**

The right-click shortcut menu enables you to perform a variety of tasks such as:

- Modify or delete objects (if permitted)
- View different kinds of employee, measure, and scorecard data. For example, to view previously collected measure results, right-click the measure and select View, then Results.
- Group data by domain and employees by manager.
- Create secondary scorecards for employees, strategy elements, and accountability elements. For example, to create a secondary employee scorecard, select their Scorecard folder, right-click and select Add.
- Copy links to attachments. This enables you to add links to attachments on different reports by pasting copied links.
- Access the Strategy Report from a map.
- Create links others can use in third-party tools such as E-mail to view application data.
- Refresh the view to reflect recent changes.
Finding and Filtering Data

This section describes how to locate notes and data. It also describes how to logically display data or display data by domain or performance status. See and .

- “Using Lookup and Search ” on page 36
- “Finding Notes” on page 36
- “Filtering Data ” on page 36
- “Using Categories” on page 37

Using Lookup and Search

You can locate and display Performance Scorecard data as follows

- Using global search from another application open in EPM Workspace—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. See “Using Cross-Product Search” on page 37. For more 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.

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 measures and scorecards.

Finding Notes

To find topics, notes, or discussion threads that contain certain criteria, select Forum, then Search and enter search criteria. See “Searching for Notes ” on page 128.

Filtering Data

Use the Domain filter to display only the data in a particular domain. This enables you to present data by distinct areas in your organization. For example, selecting a domain for a regional sales office only displays the data, such as initiatives, associated with the office.

To arrange maps, employees, and initiatives by domain, right-click their folder, and select Group by Domain from the shortcut menu. The view refreshes to present the domain structure, such as listing employees in a Human Resources domain.

To display employees below their manager to represent a reporting hierarchy, right-click the employee and select Group by Manager.
Use the Status filter to display only measures, employees, accountability elements, strategy elements, scorecards, and initiative at a particular performance status. For example, to view objects and data at risk, select the poor performance indicator.

Both filters modify the measures, initiatives scorecards, employees, maps, and map elements shown on these reports:

- Measure Performance
- Scorecard Performance
- Employee Profile
- Initiative Status
- Map Strategy Reports

**Using Cross-Product 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.

**Using Categories**

Use categories to logically organize scorecards and initiatives in reports and on view tabs.
To create categories:

1. From the Object View, click **Categories** and select a type:
   - Scorecard—Group similar kinds of scorecards, such as strategy element or employee.
   - Initiative type—Group kinds of initiatives, such as individual or departmental.
   - Initiative status—Group initiatives based on degree of completion.
   - Priority—Group initiatives by importance or urgency.

2. Click **Add**.

3. Enter a category name. For example, to create a category for financial scorecards, enter financial.

4. Summarize the category purpose in **Description**.

5. Specify the sequence in which the category is displayed in **Order**.

You can now associate scorecards or initiatives with the category.

### Portlets and EPM Workspace Pages

You can create custom views of application data by displaying the metrics and information that matter most to your team, department, or organization using custom EPM Workspace or portlet pages. Create portlet pages to display, investigate, and render key data that you specify in a portlet environment. Although you launch into Performance Scorecard to access this data, you cannot modify the data from portlets. For example, you can create a portlet that allow you to access granular, detailed information such as current and previous measure scores and results, from high-level entry points such as the Measure Performance Report. See the *Oracle Hyperion EPM System Portal Setup Guide*.

Create EPM Workspace pages to similarly display key information, from any product application installed as a Oracle Hyperion Enterprise Performance Management System component. You can simultaneously build Workspace pages that contain the following data, and refine how this data is displayed; creating highly customized and personalized presentations of key data:

- Employee scorecards
- Strategy element and accountability element scorecards
- Measures and dimensional measures
- Active Alert Report
- Initiative Status Report
- Employee Profile Report
- Measure Performance Report
- Scorecard Performance Report
- Custom reports

See “Creating EPM Workspace Pages ” on page 185.
About Frameworks

Frameworks are business methodologies that identify the importance of business areas, called perspectives, such as finance and customer relations. Frameworks help you define your business strategy based on time-honored perspectives that provide a competitive advantage. Widely used frameworks include the Balanced Scorecard Collaborative framework and the Stern Stewart Integrated EVA framework.

Frameworks enable you to perform these tasks:

- Identify the primary areas in your organization such as information and analysis.
- Group measures that monitor the performance and health of perspectives.

  For example, organizations in the banking industry might assign these measures that track customer data in the Customer perspective:

  - Loan quality
  - Aggregate credit score

- Identify the types of strategy and accountability elements you use to build maps.

Ways of Creating Frameworks

You can create frameworks as follows:

- Customize a framework provided such as the Balanced Scorecard. The framework you customize is called the base framework.
Use custom perspectives that are not provided with a framework.

**The Application Framework**

Use different frameworks to build sample Strategy and Accountability maps until you know which framework best represents your organization. When you know which framework works best, make it the *application framework*.

**Provided Frameworks**

You can customize these frameworks that Performance Scorecard provides:

- “Balanced Scorecard” on page 40
- “Stern Stewart Integrated EVA” on page 40
- “Baldrige Criteria” on page 41
- “The Key Performance Indicator Tracking Framework” on page 41

**Balanced Scorecard**

The Balanced Scorecard framework uses these perspectives.

- Financial—Defines how your organization works with its shareholders
- Internal—Defines the process your organization uses internally to create superior products.
- Customer—Describes your organization creates value for, and interacts with its client base.
- Learning and growth—Describes how your organization evolves and innovates.

**Stern Stewart Integrated EVA**

Use the Stern Stewart Integrated EVA framework (Stern Stewart) to measure not just profitability, but also economic value add and shareholder value. This framework uses this equation to identify the true profitability of your organization:

\[
\text{Net Operating Profit} - \text{Total Capital Charges} = \text{Economic Value Add}
\]

The Stern Stewart framework uses these perspectives:

- EVA and EVA drivers—Identifies the financial components of EVA and the financial EVA drivers map.
- Customer—Describes how to drive revenue by defining the customer base and managing customer needs.
- Cost—Identifies how the cost of items such as production, materials, labor transform into services and products, through activities and processes.
Capabilities—Identifies the tasks required to maintain, develop, and renew the knowledge needed to satisfy customer need.

Baldridge Criteria

The Baldridge Criteria framework largely emphasizes the role of processes in corporate strategy as follows:

- Leadership—Defines how your organization creates leadership opportunities.
- Strategic planning—Identifies how strategic objectives and goals correspond with corporate vision and direction.
- Customer and market focus—Identifies key customer relationships, acquisitions and business expansions.
- Information and analysis—Emphasizes the importance of measure, analyzing, and improving performance. Use to examine the availability of data.
- Human resources focus—Describes how to arrange your organization to improve employee cooperation, communication, and knowledge-sharing.
- Business results—Examines the role of customer satisfaction and loyalty.

The Key Performance Indicator Tracking Framework

If you do not use a performance management framework, use the Key Performance Indicator (KPI) Tracking framework. This enables you to build maps without an underlying structure and not organize measures by perspective.

Creating Frameworks

You perform these tasks to create frameworks:

- Chose to use a framework provided with Performance Scorecard. See “Defining General Settings” on page 42.
- Create perspectives.
- Create the strategic themes that you can use to group strategy elements on Strategy Trees and Strategy maps. See “Creating Strategic Themes” on page 43.
- Identify the types of strategy and accountability elements that you will use to build maps. See “Defining Element Types at the Framework Level” on page 43.
- Define the sequence in which to place strategy and accountability element levels on maps. See “Defining Element Types at the Framework Level” on page 43.
- Optional: Abbreviate strategy and accountability element type names. See “Defining Element Types at the Framework Level” on page 43.
- Optional: Replace default terms. See “Customizing Terminology” on page 44.
Use and refine the framework in a test environment to build sample Strategy and Accountability maps. Once the framework meets your needs, make it the Application Framework.

**Defining General Settings**

To create frameworks:

1. From the Object View, select **Framework List**. The Frameworks List is displayed. If another user selected an application framework, it is displayed above the Framework List.
2. Click **Add**. The Framework Setup page is displayed.
3. Enter this information:
   - Name
   - Purpose of the framework or how it is used
4. To build your framework using a provided framework, select the framework from **Base Framework**.

**Figure 3  Base Frameworks**

<table>
<thead>
<tr>
<th>Framework Name:</th>
<th>Application Framework:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Framework:</td>
<td>No Framework</td>
</tr>
<tr>
<td></td>
<td>Balanced Scorecard Framework</td>
</tr>
<tr>
<td></td>
<td>Baldridge Criteria Framework</td>
</tr>
</tbody>
</table>

**Caution!** Do not select Application Framework unless you will use the framework to create actual, not sample, Strategy and Accountability maps.

5. Click **Save**.
6. See “Creating Perspectives” on page 42.

**Creating Perspectives**

To create perspectives:

1. On the Framework Setup page, select **Display Perspectives**.
2. Click **Add in Perspectives**. The Perspective Setup box is displayed.
3. In **Order Number**, enter a number that represents the order in which to display the perspective on Strategy maps.
   - For example, to display as the third perspective, enter 3.
4. Enter the name and describe the purpose of the perspective.
5. Click **Save**. The perspectives are added to the framework.
Creating Strategic Themes

Strategic themes are high-level categories that enable you to group perspectives and strategy elements. Common themes include revenue growth, cost reduction, and productivity improvement.

To create strategic themes:
1. On the Framework Setup page, select Display Themes.
2. Click Add in Strategic Themes. The Strategic Theme Setup box is displayed.
3. Enter a number in Order Number that specifies the order in which to display the theme on maps.
4. Enter the name of the strategic theme and summarize how it is used.
5. Click Save. The themes are added to the framework.
6. Create the element types that you will use to build maps. See “Defining Element Types at the Framework Level” on page 43.

Defining Element Types at the Framework Level

Use the Strategy Hierarchy and Accountability Hierarchy tabs to identify the kinds of elements such as strategic objectives that you will use to build Strategy Trees and Accountability maps. Also use this tab to specify the order in which element levels are used on maps by creating a default hierarchy. For example, you can use the critical success factor level below the strategic objective level. This means that if you select a strategic objective on a map and add a new strategy element, the element is a critical success factor.

See:
- “Creating Strategy Element Hierarchies” on page 43
- “Creating Accountability Element Hierarchies” on page 44

Creating Strategy Element Hierarchies

This topic describes how to identify the kinds of strategy elements such as strategic objectives you will use to build strategy trees. It also describes how to arrange each element type level on maps.

Note: If a base framework is used, you can customize associated strategy hierarchy.

To create a strategy hierarchy:
2. Click Add to add elements in the order to place them on Strategy Trees.
3. Click Save.
Creating Accountability Element Hierarchies

This topic describes how to identify the accountability element types such as teams that you will use to build Accountability maps. It also describes how to customize the order in which element layers display on maps. For example, you can display the Task Force level below Department levels.

To create an accountability hierarchy:

2. Click Add to create the kinds of accountability elements such as business areas and employees that you use.

Add elements in the order to place them on maps. For example, the order in this figure means that elements added below Business Areas on maps, automatically are Departments.

3. Enter full and abbreviated names for elements.
4. Click Save.
5. **Optional:** Replace terms with those used by your organization. See “Customizing Terminology” on page 44.

Customizing Terminology

To customize framework terminology:

2. Enter replacement terms in Customized Term.
3. Click Save.

Modifying Frameworks

You can edit all frameworks except those Performance Scorecard provides.
Caution: If you use another application framework, all related perspectives are removed from measures and strategy elements. Strategy hierarchies you define at the framework level are deleted.

► To modify frameworks:
1. From the Object view, select Framework List.
2. On the list, select the framework and click Edit.
3. Change settings described in “Creating Frameworks” on page 41.

Copying Frameworks

You cannot copy frameworks from the Framework List. Instead, create a framework that uses the framework that you want to copy.

► To copy frameworks:
1. From the Object view, select Framework List.
3. On the Framework Setup page, select the framework to copy from Base Framework.
4. Modify the framework and save it under a different name.

Deleting Frameworks

You cannot delete a framework if it is the application framework or the only framework in use.

► To delete an application framework:
1. From the Object View, select Framework List.
2. Select the framework to use instead of the application framework and click Edit.
3. On Framework Setup, select Application Framework and click Save.
4. On the Framework List, delete the old application framework.

► To delete custom frameworks: Select Framework List, select the framework, and click Delete.
Employees

Employees represent any Performance Scorecard user responsible for performing tasks related to the objects with which they are associated, such as entering measure results and working on strategy elements. Because employees can use multiple scorecards to monitor the performance of objects such as measures, managers should evaluate employee performance by creating a primary scorecard for the employee.

See:

- “How Employees Access Data” on page 47
- “Employees as System Dimensions” on page 48

Basic employee information is shown on the Employee Profile Report. To view detailed information, click employees on the report to open the Employee Details Report. See “Using the Employee Profiles Report” on page 176.

How Employees Access Data

Administrators can attach employees to the user accounts that they create in Oracle’s Hyperion® Shared Services. Assigning an employee to a user account enables the person using the account to access the data that the employee can access. This, in addition to these factors governs the data that you, represented by an employee, can use:

- Security role—Specifies the measures, initiatives, scorecards, web pages, and reports that you can access. Explicit access: Enables users to only access domains that you select.
- Domain—Representation of the functionally or geographically specific corporate area in which you work, such as a regional office or department. To create objects such as maps, measures, and scorecards for a domain, an administrator must assign the **generic domain designer** security role to your account. Otherwise, the **designer role** should be assigned. To work with data in all domains below yours, an administrator must give you **implicit access**. To work only with data in a specific domain, use the **explicit access**.

To identify the accounts that need to be provisioned in Shared Services for Performance Scorecard employees, perform a Synchronize User Accounts With Employees command as described in Chapter 2 of the *Oracle Hyperion Performance Scorecard Administrator Guide*. If you have the designer security role, you can also create and assign employees to empty accounts.

### Employees Scorecards

Employees can have these kinds of scorecards:

- **Primary scorecard**—Created by managers to evaluate individual employee performance. See “Creating Primary Scorecards” on page 50.
- **Secondary scorecards**—Created by employees to assess and monitor the performance of the measures, strategy elements, accountability elements with which they work. Employees can specify who can access these scorecards.

### Employees as System Dimensions

Performance Scorecard automatically creates a dimensional outline that represents the employees, accountability elements, and strategy elements that you create to depict reporting and strategy structures. Each object is represented by a system dimension.

All employees that you create are added as members of the Employee system dimension. Creating employees changes the application’s dimensional structure. Consequently, may have to generate new or regenerate existing dimensional measures to include new or deleted employees.

### About Creating Employees

You perform these tasks to create employees:

1. Specify business and contact information, including the functional or geographic area (domain) in which employees work.
2. Specify the dimensional context, such as the dimensions, for the scorecards that employees can create. If employees use multiple scorecards that use dimensional measures, select which dimensions or members to use in scorecard calculations.
3. Create a scorecard to monitor employee performance. Because employees can be associated with multiple scorecards, the scorecard created during employee creation is their primary scorecard that evaluates their performance.
4. Assign employees to the business objects such as measures with which they will work or
transfer responsibilities between employees.

5. **Optional:** Create categories to organize the scorecards that employees can access. This
groups related scorecards in reports and on the Browser View. See “Using Categories” on
page 37.

**Note:** Creating employees changes the application’s dimensional structure. You may have to
generate new or regenerate existing dimensional measures to include new or deleted
employees.

Basic employee information is shown on the Employee Profile Report. To view detailed
information, click employees on the report to open the Employee Details Report. See “Using the
Employee Profiles Report” on page 176.

**Creating Employees**

- To create employees:
  1. From the Object View, select **Employee List**.
  2. On the Employee List, click **Add**. The General tab of the Employee Setup General page is displayed.
  3. Enter the first and last name of the employee.
  4. **Optional:** Enter this information:
     - Number
     - Job title
     - Department and manager
  5. **Optional:** To associate an employee with a distinct physical or functional area, click **Select in Domain**.

**Tip:** You can also place employees in domains by selecting employees on the Employee List
and clicking **Domain Assignment**.

6. To attach a picture of an employees, click **Browse in Picture** and navigate to select the file.

7. Navigate and select the image file.

8. To associate an employee with dimension members, such as strategy elements, click **Select in Select
Dimensions** and perform these tasks:
   a. On the Select Dimensions box, click **Select** adjacent to the kind of dimension member
to use.
     
     The member you select forms the dimensional context of the scorecard. This determines
the dimensional measures used in scorecard calculations.
   b. Expand the dimensional hierarchy to select the member to assign.
In this figure, an employee is associated with dimensional measures that monitor how to extend the customer base by finding new markets.

Figure 5  Select Dimension Member Box

- Dimension
- Strategy
- Eden Strategy Map
  - Eden Corporation
    - Attract and Retain High Quality Employees
    - Best After Purchase Services
    - High Quality products, reasonably priced
    - Increase Customer Base
    - Attracting New Customers
- Finding New Markets
  - Research (competitive and price)
  - Profitable Growth
  - Provide New Products to Market Quickly

9  Enter contact information such address, phone numbers, and E-mail address. The E-mail address is used for alert notifications and becomes a link or reports.

10  Perform any task:
  - To monitor employee performance using a primary scorecard, select the Scorecard tab. See “Creating Primary Scorecards” on page 50.
  - To assign employees to the measures, accountability, and strategy elements with which they work, select the Responsibilities tab. See “Assigning Responsibilities” on page 51.
  - To associate the primary scorecard for the employee with categories, select the Miscellaneous tab.
  - If the employee has scorecards that use dimensional measures, select the Miscellaneous tab to select the dimensions or members to use in calculations.

Additional Setup Settings

To associate the primary scorecard for the map element or employee with categories, click Select in Categories and choose the category. If the employee or element has scorecards that use dimensional measures, click Select in Dimension List and specify the dimensions or members to use in calculations.

Creating Primary Scorecards

Evaluate the personal performance of employees by creating primary scorecards. Primary scorecards are saved under the name of the employee that they monitor and are displayed in the Scorecards folder below the employees.
To create primary scorecards:

1. Select the Scorecard tab on the Employee Setup page.
2. Add and assign weights to the measures and scorecards that reflect employee performance. See “Adding Components” on page 104.
3. Select Range to define the scores, that if employee achieve on their primary scorecards, indicate their performance status. See “Defining Ranges for Primary Scorecards” on page 52.

**Tip:** To create ranges that you can use to build other scorecards, create a named range. To create ranges to use only on an employee scorecard, create a custom range.

4. Optional: Select the Miscellaneous tab to perform these tasks:
   - Choose the members for which to generate dimensional measures that you can use in scorecard calculations.
   - Create categories in which to display scorecards in reports.

See “Selecting Members and Scorecard Categories” on page 53.

## Assigning Responsibilities

Use the Responsibility tab to assign employees to objects such as strategy elements which they are associated and specify the tasks that they must perform. You can also transfer responsibilities between employee on this tab. See “Transferring Responsibilities” on page 52.

To assign employees responsibilities:

1. On the Employee Setup page, select Responsibilities.
2. Click Setup adjacent to the tasks that the employee will perform. For example, to ensure that an employee gathers results for a measure, click Select in Result Collector and choose the measure.
3. You can assign these responsibilities to employees:
   - For measures:
     - Owner—Employee is responsible for overall performance.
     - Result collection—Employee must ensure that result values are gathered or entered.
     - Target setter—Employee is responsible for entering target values.
     - Annotation creator—Employee can post annotations, which are context specific notes created for a specific reporting period, about the measure.
   - Strategy and Accountability elements:
     - Owner—Employee is responsible for overall element performance.
     - Member—Employee is associated with, and contributes to, the element.
     - Annotation creator—Employee can post annotations, which are context specific notes created for a specific reporting period, about the element.
- **Employee Manager**—The employee is responsible for the performance of selected employees.
- **For initiatives:**
  - **Owner**—Employee is responsible for completing initiatives.
  - **Member**—Employee is associated with, and contributes to, initiatives.
  - **Notified**—Employee is alerted of, and responds to, the completion of initiatives.

From the Selection box that is displayed, select the measure, element, employee, or initiative to which to assign an employee and click **Apply**.

To remove employees from objects, click **Setup**, beside the object, and then **Clear**.

### Transferring Responsibilities

Reallocate tasks by re-assigning responsibilities from one employee to another. This enables you to quickly adjust to organizational changes such as acquisitions and promotions. For example, when a department manager retires, you can transfer their responsibilities, such as their staff, to another employee.

To transfer responsibilities:

1. From the Object view, select **Employee List**.
2. On the Employee List, select the employee to receive responsibilities, and click **Edit**.
3. On the Employee Setup page, select the **Responsibilities** tab.
4. Click **Transfer From** adjacent to the tasks to reassign. For example, to have the employee enter measure targets, click **Transfer From** in **Target Setter**.
   
   To reassign staff, click **Transfer From** in **Managed Employees**.
5. Select the employee from whom to transfer responsibility in the Select Employee box.
6. Select an option:
   - To add the responsibility to those that the employee already has, select **Add new responsibilities**.
   - To delete their existing responsibilities and only assign the new responsibilities, select **Replace existing responsibilities**.
7. Click **Save**.

### Defining Ranges for Primary Scorecards

You must create the ranges that evaluate and represent employee performance based on their primary scorecard score. To use a range to build other scorecards, create named ranges. See “Creating Named Ranges” on page 81. To use a ranges only on one scorecard, create a custom range. See “Creating Custom Ranges” on page 82.
Selecting Members and Scorecard Categories

Use the Miscellaneous tab to select the members for which to generate dimensional measures you use in primary scorecard calculations. You can also use this tab to select categories in which to display employee scorecards and initiatives.

To select dimensional measures:
1. Select the Miscellaneous tab on the Employee Setup page.
2. In Member List, click Select.
   The Select Dimension box is displayed. The system (Accountability and Strategy) dimensions are displayed in addition to custom dimensions you have created.
3. Click Select in the dimension that contains the members to use.
   The Select Dimension Member dialog box is displayed.
4. Expand the dimensional outline to select members. Each member you select is added to the Select Dimension dialog box. Because you can only select individual members, repeat this step until you have chosen all the members for which to generate dimensional measures.
5. On the Select Dimension Member box, click OK.
   You return to the Employee Setup page. The members for which dimensional measures are generated for use in scorecards are displayed.

Modifying Employee Profiles

Modify employee profiles to reflect changes such as:
- Assignment to different business objects.
- New responsibilities
- Association with a different manager or domain

To modify employees:
1. From the Object view, select Employee List.
2. On the Employee List, select an employee and click Edit.
   The Employee Setup page is displayed.

   Tip: You can also access this page by expanding Employee List on the Object View, right-clicking the employee, and selecting Edit
3. Change any of the settings you specified in “Creating Employees” on page 49.
4. Click Save.
Copy the text below:

# Copying and Deleting Employees

Copying and deleting employees may modify the dimensional outline and dimensional measures. You may have to regenerate dimensional measures to reflect your changes.

To copy or delete employees:

1. **From the Object view, select Employee List.**
2. **On the list, display and select employees as follows:**
   - To select employees in a specific functional or geographic area represented by a domain, enter the domain name in **Filter**.
   - To select employees not listed consecutively, press **Ctrl** before selecting the employees.
3. **Click Copy or Delete.**

Employees that you copy have “Copy Of” before their name.
About Maps

This topic describes how to use these maps to represent organizational or departmental strategy and reporting structures:

- “Strategy Trees” on page 55
- “Strategy Maps” on page 56
- “Accountability Maps” on page 56

It also describes the strategy and accountability elements that you use to build maps.

Strategy Trees

Strategy trees enable you to create, develop, and communicate the strategic plan of your entire organization, or areas in your organization such as departments and offices.

Create a Strategy tree to divide high-level strategic goals into lower-level elements and actions for which business units or employees are responsible. This enables employees to understand how their efforts contribute to overall corporate strategy.
Attach scorecards to elements to monitor their progress. Two performance indicators and a scoring bar will display on each element to communicate performance levels. The first indicator represents current performance as evaluated by a scorecard. The second indicator represents the status of the lowest performing element associated with the element. The scoring bar at the bottom expresses the element performance level as a percent.

For example, the following map element has an acceptable, if lower performance level as indicated by the first, yellow, performance indicator. A lower level element associated with this element, has poor performance as represented by the second, red, performance indicator. The scoring bar indicates that current performance level is 81%.

**Tip:** If areas of your organization use separate Strategy trees, you can link these maps together to represent how the strategy of each area forms an integrated corporate strategy.

## Strategy Maps

Strategy maps identify how strategy elements are interrelated and how they work together to meet your organization’s strategic goals. For example, a strategy element called “Improved Product Quality” probably impacts strategy elements called “Reduce product returns” and “Increase customer satisfaction” since a low level of product returns indicates good product quality. Consequently, Strategy maps enable you to anticipate how changes in one strategy element affect other strategy elements. See “About Creating Strategy Maps” on page 64.

You can organize elements on Strategy maps using the perspectives and strategic themes defined by the framework you are using. See “Defining Element Types at the Framework Level” on page 43.

## Accountability Maps

Accountability maps depict the departmental and reporting structure of your organization. Create Accountability maps to depict how the levels of your organization integrate to form a cohesive reporting structure. Typical high level business areas include departments such as Finance, Operations, Manufacturing, and Human Resources to which you can link teams, tasks forces, or individual employees. For example, business areas for Administration and Accounting departments report to Finance, and Employee Services reports to Human Resources.

If your organization is very large, create Accountability maps for each distinct area or domain. For example, using the sample organization shown above, you could create maps for these departments:

- Employee Services and Customer Services
- Franchising
- Administration and Accounting
- Sales and Marketing
- Property and Construction
Accountability map elements that you create are automatically represented by members in the Accountability system dimension. This means that Accountability maps can serve as measure templates, enabling you to generate dimensional measures based on the reporting structures that you define using Accountability maps. See “Creating Scorecards Based on Maps” on page 57.

Link maps to create an overall corporate accountability structure. See “Linking Maps” on page 69.

Creating Scorecards Based on Maps

Performance Scorecard automatically creates dimensional structures, called system maps, that represent the Strategy Trees and Accountability maps that you create. You can generate dimensional measures for scorecarding purposes based on these system maps. This enables you to use maps as measure templates from which to create dimensional measures that evaluate the performance of strategy elements and business areas in your organization.

Map Elements

Map elements represent the strategy and accountability elements such as goals, critical success factors, and departments that you create and organize to form maps. The hierarchy of these elements displays in the appropriate map folder. For example, the Eden Company accountability map below is comprised of accountability elements representing departments such as Research & Development, IT and Human Resources.

To change the name of element types and the default order in which they appear on maps, see “Defining Element Types at the Framework Level” on page 43.

Attach scorecards to elements to monitor their progress. Two performance indicators and a scoring bar display on each element to represent performance levels. The first indicator to the left represents current performance as evaluated by a scorecard. The second indicator, below the first, represents the status of the lowest performing element associated with the element. The scoring bar at the bottom expresses the element performance level as a percent.
**Entities**

Entities represent the highest level on a map. If you create a single Strategy Tree for your organization, the entity represents your organization. If you are creating a map to represent the strategy of individual business areas or domains such as the Sales department, the Sales department is the entity. Place the map box that represents the entity at the top of the map.

**Strategic Objectives**

Strategic Objectives (SOs) represent high-level goals that must be met to achieve a strategy statement. For example, if part of your corporate strategy is to increase the net profit you could create these SO’s:

- Expanded client base
- Decreased internal costs

You can divide SOs into lower-level SOs or critical success factors. For example “Expanded Client Base can be refined to create lower level SOs called “Identify Potential Clients” and “Approach Potential Clients”.

**Critical Success Factors and Critical Processes**

Critical Success Factors (CSFs) and Critical Processes (CPs) represent policies or procedures that you create to achieve strategic objectives. For example, a CSF for the SO “Decreased internal spending” could be “Non—essential costs identified”, since eliminating necessary costs will help decrease internal spending.

**Actions**

Actions represent tasks that must be performed for you to achieve a strategic objective or establish a CSF or CP. For example, these actions support the SO “Decrease costs”:

- Track expenditures by department
- Evaluate expenditures on a monthly basis

**Critical Business Areas**

Critical Business Areas (CBAs) represent distinct business areas or groups of employees in an organization or domain such as:

- Departments
- Divisions
- Committees

You assign each element to the strategy elements for which they are responsible.
Requirements

Ensure that you selected an application framework before you create maps. The framework you specify determines the type of elements available to build maps and the default hierarchy in which they are added to maps. See “Using Performance Management Frameworks” on page 39.

The Map Editor

You create and organize the elements that form Accountability maps and Strategy Trees in the Map Editor. Click the new box button, to create boxes to represent each strategy and accountability element to use.

- Click the horizontal view button, to display the map with the highest-level item to the left.
- Click the radial view button, to display the map with the highest-level item in the middle.

Figure 7  Sample Strategy Tree

The performance status of elements is represented by performance indicators on the left side of each element and a scoring bar. If a map element is gray, it belongs to another map to which the current map is linked. Double-click elements to launch connected map.

Use the shortcut menu to perform these tasks that enable you to more quickly build maps:

- Set Domains—Place maps or elements in a domain that you choose.
- Link to External Map—Connect maps by linking from an element on one map to an element on another map. This enables you to connect maps, indicating how different strategy and accountability structures are integrated across a business area or organization.
Set Template—Apply scorecard templates to strategy or accountability element scorecards. This enables you to use templates without opening the existing scorecard and applying the template.

Set Template on This and Descendants—Apply scorecard templates to the scorecards of all child elements. This enables you to use templates without opening existing scorecards and applying the template.

About Creating Strategy Trees

Strategy Trees enable you to represent different levels of corporate strategy. Create Strategy Trees to transform high-level corporate goals into more specific objectives, processes, or actions.

You perform these tasks to create Strategy Trees:

- Create map boxes for strategy elements.
- Define strategy element properties, such as the following:
  - The business areas responsible for the element
  - The perspectives and strategic themes with which the element is aligned
  - The scorecard that evaluates and monitors the progress of the element

Because you must specify the business areas responsible for strategy elements, create business areas before Strategy Trees. See “Creating Accountability Elements” on page 62.

See “Creating Strategy Trees” on page 60.

Creating Strategy Trees

This topic describes how to build a Strategy Tree by creating and arranging boxes for strategy elements.

**Note:** If you use domain-based authorization, new Strategy Trees do not display on the Object view. To place Strategy Trees in a domain, select Edit, then Set Domains.

1. To create strategy elements:

   1. From the Object view, select Maps, and then Strategy Tree.
      The Map List is displayed.
   2. On the Map List, click Add
      An empty map opens in the Map Editor.
   3. Enter the name for the Strategy Tree in the Performance Scorecard toolbar.
   4. **Optional:** To place the map in a domain, select Edit, then Set Domain, then select the domain from the box that is displayed, and then click OK.
Click the new box button. A box that represents the highest strategy level of is added to the map.

Right-click the box and select **Properties**.

The Element Properties box is displayed.

In **Element Name**, enter the name of the strategy element, such as Reduce Costs.

From **Element Type** select the element type, such as strategic objective.

If you defined short names for strategy element types when you set up the framework, these names are used.

The element is added to the Strategy Tree hierarchy in the Object View.

Repeat this procedure to create boxes for each strategy element.

Drag and drop elements to create the strategy structure.

Define the properties of each strategy element. See “Setting up Strategy Elements” on page 61.

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**Setting up Strategy Elements**

To later modify elements, select them on the Object View, right-click, and select **Edit** from the shortcut menu.

To set up strategy elements:

1. Expand the Strategy Tree to access the element.
2. Click on the strategy element.

   The Strategy Element Setup page is displayed.

   If the element is beneath another element on the map, the name of the element is displayed in **Parent**.
3. Enter the name of the strategy element and describe its purpose.
4. Click **Select** in **Annotation Creators** to choose the employees that can create annotations for the element.
5. Click **Select** in **Owners** to identify the employee that owns the element.
6. Click **Select** in **Accountability Elements** to identify the business area responsible for the strategy element.
7. From **Primary Perspective**, select the perspective with which to align the element.
8. To group the element using another perspective, click **Select** in **Secondary Perspective**.

   For example the SO for High Customer Satisfaction could also be aligned with the Financial perspective because high satisfaction leads to a wider client base and number of sales.
9. **Optional**: Group elements by a **Strategic Theme** if you defined themes when you created a framework.
10. **Optional**: If you will create a scorecard for the element that uses dimensional measures, click **Select** in **Dimensional Context** to select the dimensions and members to use in scorecard calculations.
11. Perform any of these tasks:
Select the Ranges tab to specify the scores that reflect different levels of performance. These ranges are used on the scorecard of the strategy element. See “Defining Ranges” on page 104.

Select the Scorecard tab to create a scorecard that monitors the performance of the element. See “Creating Scorecards” on page 103.

**Tip:** If the element has a scorecard, you can apply a scorecard template to add common measures and scorecards to the scorecard. This frees you from having to open the existing scorecard and applying the template yourself. To apply a scorecard template, right-click the element and select Set Template.

### Creating Accountability Maps

Create Accountability maps to represent the reporting hierarchies in your organization. These are the departments, divisions, and teams that are responsible for the strategy elements that compose your corporate strategy. If you use domain-based authorization, maps you create do not display on the Object view. Associate a map with a domain by selecting Edit, then Set Domains.

To create Accountability maps:

1. From the Object view, select Maps, and then Accountability.
2. On the Map List, click Add.
3. An empty map opens in the map editor.
4. Click the new box button, A box is added to the map.
5. Right-click on the element and select Properties. The Properties box is displayed.
6. Enter a name for the element.
7. Select the type of element that you are creating from Element Type.
8. Repeat these steps to create all the elements required to build the Accountability map.

The business areas that you create are placed in the map folder on the Object View.

9. Define the properties of each business area. See “Creating Accountability Elements” on page 62.

### Creating Accountability Elements

This topic describes how to create and arrange map elements that represent the reporting structure of your organization.

**Tip:** To later modify the element, expand the map folder, select the element, right-click and select Edit from the shortcut menu.
To set up accountability elements:

1. **Expand the list of business areas in the map folder and click on each element.**
   
   If the element is beneath another map element (is a child), the name of the parent element is displayed.

2. **Enter this information:**
   - Mission—Goal or purpose of the business area
   - Vision—The future goal or purpose of the business area
   - Differentiator—Features that distinguish the element from similar areas in competitor organizations

3. **Click Select in Strategy Elements Owned and identify the strategy elements for which the business area is responsible.**

4. **Click Select in Owners to choose the employees that are responsible for the business area.**

5. **Click Select in Members to choose the employees that are part of the business area.**

6. **Click Select in Annotation Creators to choose the employees that can create annotations for the business area.**

7. **If you will create a scorecard for the element that uses dimensional measures, clickSelect in Dimensional Context to select the dimensions and members to use in scorecard calculations.**

8. **Perform any task:**
   - To place the primary scorecard for the element in a category, or to use dimensional measures on the element’s scorecard, select the Miscellaneous tab. See “Additional Options” on page 63.
   - To specify the scores that reflect different levels of performance, select Ranges. These ranges are used on the scorecard for the element. See “Defining Ranges” on page 104.
   - To create a scorecard to monitor the performance of the element, select Scorecard. See “Creating Scorecards” on page 103.

   **Tip:** If the element already has a scorecard, you can apply a scorecard template to add common measures and scorecards to the scorecard. This means you need not open the scorecard to apply the template. To apply a template, right-click the element, then select Set Template.

9. **Save your work.**

The Accountability map and elements display in the Accountability Maps folder on the Object and Browser Views.

**Additional Options**

To associate the primary scorecard for the element with categories, click Select in Categories and choose the category. If the performance of the element is monitored by scorecards that use
dimensional measures, select the Miscellaneous tab, then click Select in Dimension List and specify the dimensions or members to use in calculations.

**About Creating Strategy Maps**

You perform these tasks to create Strategy maps:

1. Create a background image in a graphics editor such as Adobe Photoshop. See “Creating the Background” on page 64.
   
   The image must contain boxes (placeholders) that represent the strategy elements and perspectives you will use on the map. It must also contain lines or arrows that indicate relationships between strategy elements.

2. Import the background image. See “Creating the Background” on page 64.

3. Build the map by placing the strategy elements, strategic themes, and perspective in placeholders on the background image. See “Adding Strategy Elements” on page 66.

**Creating Strategy Maps**

Build Strategy maps to represent how strategic goals and elements interact. This enables you to identify how changes to one strategic goal or element impact others. See

- “Creating the Background” on page 64
- “Adding Strategy Elements” on page 66

If you use domain-based authorization, new maps do not display on the Object view. To place new maps in a domain, select Edit, and then Set Domains.

**Creating the Background**

This topic describes how to create and import the image to use as a Strategy map background. The image must include placeholders to represent these items:

- Strategy elements
- Strategic themes
- Links between strategy elements

To create the map background:

**1. In a graphics editor, create boxes that are placeholders for the elements you will use on the map.**

The image must include placeholders to represent:

- Strategy elements
- Strategic themes
- Links between strategy elements
2. Create relationships and links by connecting boxes with arrows or lines.

3. Save the background as an image file in one of these formats:
   - JPG
   - GIF
   - BMP
   - PNG

4. From the Object view, select Maps, and then Strategy.

5. Click Add.

6. Select File, then Choose Image. The Choose Background box is displayed.

7. Perform a task:
   - If the image file is stored in a local directory, select Upload Image, select the file, and then Just Images from File of Type.
   - If you saved the image to a URL address, select Choose URL and enter the location.

   The image loads in the map editor. See “The Strategy Map Editor” on page 65.

8. Select File, and then Rename, and enter the map name.


The Strategy Map Editor

The following figure depicts the Strategy Map Editor and describes how you will use it to find, filter, and add elements to the map.

Figure 8  Strategy Map Editor

The map editor has these components and tools:
Adding Strategy Elements

This topic describes how to add strategy elements such from Strategy Trees, to a Strategy map.

To add strategy elements to a map:

1. From the Object view, select the Strategy Tree that has the elements that you want to use.
2. Select Snap To, then Box Color Area to select the color of the placeholder to which you will drag strategy elements.
3. On the background image, click a placeholder box.
   All placeholders on the map background to which you can place strategy elements are indicated in green. To change the color of placeholders, perform these tasks:
   a. Select Snap To, and then Box Color Area. The cursor changes to a color dropper
   b. Click the cursor on the color to assign to the placeholders. All areas of the matching color are outlined in green.
4. Select Snap To, and then Enable Snap To.
5. From the right-hand frame, drag the elements to use to the appropriate placeholder.
   To add perspectives and strategic themes, use the Item Selector to change the list of elements displayed to include perspectives and themes.
6. Save the map.
   The map is displayed in the Strategy Map folder on the Object and Browser Views.

Modifying Maps

These topics describe how to modify maps:

- “Modifying Strategy Trees and Accountability Maps” on page 67
- “Modifying Strategy Maps” on page 67

Tip: To quickly open a map select it in the map folder, right-click, and select Edit from the shortcut menu.
Modifying Strategy Trees and Accountability Maps

Modify Accountability maps and Strategy Trees by performing tasks such as the following:

- Renaming the map by selecting File, and then Rename.
- Changing the map structure by dragging and dropping elements
- Modify the properties of individual map elements. See:
  - “Setting up Strategy Elements” on page 61
  - “Creating Accountability Elements” on page 62.

See also “Modifying Strategy Maps” on page 67.

To quickly open a map, select it in the map folder, right-click, and then select Edit from the shortcut menu.

Modifying Strategy Maps

Select Maps, the map type, and then the name. Modify the layout by performing any of these tasks:

- “Changing the Background” on page 67
- “Changing Element Colors” on page 67
- “Repositioning Element Properties” on page 68
- “Changing Perspective Fonts” on page 68

Changing the Background

If you import a modified map background, you must move or resize the elements on the map.

Changing Element Colors

This topic describes how to change the background color of elements on Strategy maps.

➤ To modify the background color for a map element:

1. From the Object View, select Maps, and then Strategy.
   
   The Map List is displayed.

2. On the Map List, select the map, and click Edit.

3. Right-click on the element and select Properties.

4. Select a tab:
   - To use a color from the palette, select Swatches.
   - To use a custom color, select HSB (Hue Saturation Brightness) and RGB (Red Green Blue) and enter the color values into the boxes provided.
Review the color change in the Preview pane before applying it.

Click OK to apply the color.

Repositioning Element Properties

This topic describes how to change the information, and the position of the information, that is displayed on Strategy map elements.

To rearrange element information:
1. On the Object View, select Maps, then Strategy Maps. The Map List is displayed.
2. Select the map and click Edit.
3. On the map, click the element and select Edit then Customize Box Properties.
4. Select Sub Items and choose the information to display.
   You can display or hide the title, name, score, status, performance trend, and status of the lowest-performing element in a hierarchy.
5. Drag and drop information to change the layout of the element.
   For example, move the element name to the bottom of the box and display the status at the top.

Changing Element Display Options

This topic describes how to change the background color, shape, and font size of an element on a Strategy map.

To change display options:
1. On the Object View, select Maps, and then Strategy Maps.
2. On the map, click the element and select Edit, then Customize Box Template.
3. Select Attributes, then Background Color and set the background color for the strategy element. The Choose Background Color box is displayed.
4. Optional: Select Background Image to use an image as the background.
5. Select Border to change these properties:
   - Color of the border
   - Thickness of the border line
   - Type, shape, of the border

Changing Perspective Fonts

This topic describes how to use a different font for perspectives on Strategy maps.
To modify perspective fonts:

1. On the Object View, select Maps, and then Strategy Maps.
2. On the list, select the map and click Edit.
3. On the map, click the perspective and select Edit, then Change Text Properties.
4. In Font, click Choose to select a different font and font size.
5. Click OK.
6. In Foreground, click Choose to select the font color.
7. Click OK.
8. To reposition the font on the box, such as displaying it vertically, use Orientation.

### Linking Maps

You can link the Strategy Trees and Accountability maps of different departments or domains in your organization by connecting map elements. This enables employees to understand how the strategy and reporting structure of each department work together to support your organization’s overall strategy and accountability structures.

To link two maps:

1. Open the map from which to create the link. From the Object view, select Maps, then map type, and then map.
2. Click on the element that you want to link to another map.
3. Select Edit, then Link to External Map.
   The External Map List is displayed.
4. Expand the hierarchy and select the map to which you want to link.
5. Expand the map elements to select the element to which to connect the link.
   The linked elements become gray, and display on the others map.

Open linked maps by double-clicking either element.

### Copying and Deleting Strategy Trees and Maps

To copy or delete Strategy trees and maps:

1. From the Object view, select the Strategy Tree or map.
   The Strategy Tree or Map List is displayed.
2. Select the Strategy Tree or map.
3. Click Copy or Delete.
Maps and Strategy Trees that you duplicate are indicated by Copy of before their name.
About Measures

Also known as metrics and KPIs, measures enable you to collect objective, quantifiable data or data that indicates progress toward a performance or strategy target. For example, if one strategic goal is improved product quality, you could create measures called “number of product returns” or “poor customer satisfaction”. These measures would reflect product quality by identifying the number of product returns and dissatisfied customers. Measures enable you to perform these tasks:

- Categorize and interpret business data. Use measures to reflect the health of key areas (perspectives), in your organization such as finance. For example, a measure that tracks the return on assets for an organization in the banking industry provides financial data and should be associated with the financial perspective.
- Create scorecards to evaluate and represent the performance of strategy elements, accountability elements and employees.

Assign employees to measures to have them perform specific tasks such as enter results or establish target values. You can associate measures with the domain, such as a department, in which they are used to partition data in your application.
Components

This topic explains how measures work by describing these concepts and components:

- “Results and Scores” on page 72
- “Targets and Multivalue Targets” on page 72
- “Units” on page 73
- “About Frequencies” on page 73
- “Uncollected Measures” on page 75
- “Formulas” on page 75
- “Employees” on page 76
- “Performance Indicators and Ranges” on page 76

Results and Scores

The data collected by measures is called results. Results are expressed in units such as monetary currencies and hours. You can collect results as follows:

- Using a result formula
- Assigning employees as result collector to enter results using reports
- Importing results from an external data source using the Import/Export Flat File Utility. See the Oracle Hyperion Performance Scorecard Administrator’s Guide.
- Retrieving results from Essbase databases

You specify when and how often to gather results by selecting frequencies. Measures that do not collect results during the period of time defined by the frequency are called uncollected. Measures may be unable to collect results for these reasons:

- Results do not exist or are unavailable.
- Results were not entered during the collection period defined by the frequency.

Measures use score formulas to evaluate the results that they collect. This provides an overall reflection of performance as a percent.

The result that you want measures to collect, the desired outcome, are called targets. See “Targets and Multivalue Targets” on page 72.

Targets and Multivalue Targets

The result that you want measures to collect are called target values. Every target that you create can be used for any measure, and is displayed in the Report Target list on the toolbar. Select different targets from the list to evaluate performance and perform calculations using another target. Specify when and how often targets are used to capture and assess data using target frequencies. Specify actual target values as follows:
• Using formulas that contain functions such as mComparator or mSubTarget that reference and insert the targets for measures that you choose
• Assigning employees as target setters so that they can enter values
• Importing target values from external data sources using the Import/Export Flat File Utility.

*Multivalue targets* are those that can have numerous subtargets. For example, a target for a measure that monitors assembly settings such as Approximate Height could contain *subtargets* for maximum height, average height, and minimum height values.

### Units

Units quantify result and target values. For example, a measure that records the number of calls to customer support each week could use a “Calls per week” unit. Although you can create your own, Performance Scorecard provides predefined units such as:

• Total hours
• Number of claims
• Monetary units such as Hong Kong dollar, yen, and rand.

### About Frequencies

Frequencies determine when measure result and target values are expected to be entered (collection frequency), and the dates with which these values are displayed in reports (reporting frequency). You can use these frequencies:

• None—No frequency. You must specify the date on which results will be entered.
• Daily—Every day
• Daily (M-F)—Every weekday
• Weekly—Each week
• Semi-monthly—On the first and sixteenth days of the month (for February, on the first and the 15th)
• Monthly—Each month
• Quarterly—Each quarter year. Quarters begin one the first day of January, April, July, and October.
• Semi-annually—Twice a year.
• Annually—Once a year.

Specify the actual day on which to collect results and target values using the following periods, or subfrequencies:

• Every x periods—How much time elapses between collection. For example, if you select a monthly frequency and enter a period of 3, results or targets are collected on every third month.
• The first day of the period—Day of the week on which to collect data.

• The first day of the period—Collect data on the first day of the period. For example, if for a target you chose a monthly frequency, specify a period of 2, and this option, target values are gathered monthly, every other month on the first day of the month.

• The last day of the period—Specify the day on which to collect data. For example, for a measure, you chose the weekly frequency, specify a period of 4, and select this option, results are collected on the last day of every fourth week.

• x day of the period—Specify the day on which to collect data. For example, if for a target, you use a semi-monthly frequency, a period of 2, and specify 4 for this option, target values are gathered twice a month, every month, on the fourth day of the month.

• The last day of the period—Specify the last day on which to collect data. For example, if you chose a frequency of weekly, specify a period of 4, and select Wednesday from this list, data is collected on the last Wednesday of every week, every four weeks.

• On date—Always collect results on the date that you specify.

See:

• “Frequencies and Collection Extensions” on page 74
• “52 and 53–Week Years” on page 75

Frequencies and Collection Extensions

Report frequencies generate lists of dates of which result and target values are reflective in Performance Scorecard reports. Collection frequencies generate a series of dates on which measure result and target values are meant to be entered or available. Extensions enable you to identify the day by which values must be entered. For example, assume a measure has a result collection date of May 26. If you specify a three day collection extension, results can be entered up to and including May 29, but not afterward.

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. To ensure that results cannot be entered after February 18th, specify an extension of 3. These frequency settings ensure that although sale figure results for January are not collected until February 15th, they are displayed for January in reports. They also ensure that Sales result values cannot be entered more than three days after February 15th.

The same frequency rules apply to target values. The target collection frequency generates dates by which target values are expected to be entered. The target reporting frequency identifies the dates with which target values are associated, in reports.

When collection extension expire, measures lock, preventing users from entering result and target values. An administrator can break the lock. See the Oracle Hyperion Performance Scorecard Administrator’s Guide.
52 and 53–Week Years

If your organization is in the retail industry or government sector, use a 364 day (52 week) year. For 52–week years, quarterly and semi annual frequencies change from being month-based to week-based. For example, a quarterly frequency becomes 13 weeks, instead of three months. If you use a 52–week year, weeks are distributed in groups of 4 and 5.

See “Using a 52–Week Year ” on page 111.

Uncollected Measures

Measures are considered uncollected if a result is not entered during the collection period defined by the frequency or by the collection extension. You can specify how uncollected results are displayed in reports and used in calculations using the Scorecard Configuration page. This enables you to customize how to handle uncollected and missing data by substituting a previous result value, or excluding missing results from calculations. See “Using Uncollected or Unavailable Data ” on page 108.

Formulas

Create formulas to define how result values, target values, and scores are computed and evaluated to determine overall measure performance as follows:

- **Target formulas**—Use if the results or scores of other measures affect the target of a measure. For example, the target for a measure monitoring “Product Sales” could be the result of this measure from the previous year plus 15%.

- **Result formulas**—Use if data for other objects impacts the result of a measure. For example, a result formula for a composite measure called “Net Profit” would include results for measures such as Cost of Sales and Operating Expenses.

- **Score formulas**—Determine how results are evaluated to produce a score that reflects overall performance. By default, Performance Scorecard uses this formula that calculates scores by dividing a measure's result by its target:

  \[
  \frac{\text{Result (this)}}{\text{Target (this)}}
  \]

  “This” represents the current measure.

Use the Formula Editor to create complex formulas using functions to insert the following data:

- Measure results, scores, targets, and variances
- Variable results
- Scorecard scores

To build formulas using data previously collected, use time-related functions such as `timeOffset`.

For more information, see Appendix B, “Creating Complex Formulas”.
Employees

You assign employees to measures to perform these tasks:

- Take responsibility for the measure. The employee is the Owner.
- Enter or modify result values. The employee is the Result Collector.
- Enter single or multivalue target values. The employee is the Target Setter.
- Create annotations to discuss performance during a reporting period, such as a financial quarter. The employee is the Annotation Creator. See Chapter 11, “Using Notes and Annotations”.

You can assign employees to measures as follows:

- When you create employees. See “Creating Employees” on page 49.
- When you create measures. See “Defining Report Options and Assigning Employees” on page 86.

To prevent users from accessing measures, Administrators can define security roles that grant access only if employees have specific measure assignments, such as ownership. See the Oracle Hyperion Performance Scorecard Administrator’s Guide.

Performance Indicators and Ranges

Performance indicators are graphical representations of measure and scorecard performance levels. A set of ranges is associated with each measure and evaluates results and scores to represent performance levels. For example, to indicate high performance if a measure result is between 70 and 100, enter 70, then the less than symbol, then after x the less than symbol, and then 100 as the range for the indicator representing high performance.

Tip: If you use the same range to evaluate other measures or scorecards, create a named range. Named ranges enable you to define a range of values once, that you can later select when you define other measures or scorecards.

Performance Scorecard provides four performance indicators to represent levels of performance. Green represents high performance, yellow represents acceptable performance, red represents poor performance, and white indicates no performance level can be defined. You can modify these indicators, or create your own indicators, as required.

Basic and Composite Measures

Basic measures do not have result formulas as results are entered manually or loaded from external data sources. Basic measures are also non-dimensional.
Conversely, composite measures use result formulas to derive their result because they include data from other measures or scorecards.

**Dimensional Measures**

Dimensions are high-level categories such as Sales, and Products, that you can use to logically group related measure data. Dimensions contain members that are items that can be grouped by the dimension. The hierarchies you form with dimensions and members are *custom dimensional outlines* that enable you to generate dimensional measures that gather data where dimensions and members intersect. This enables you to collect data using multiple data points, such as Sales by Office. For example, in an international software organization, to monitor product sales by sales office, perform these tasks:

- Create a dimensional outline in which dimensions represent each sales office and product.
- Create a measure template called Product Sales, to which you add the dimensions for office and product.

**Tip:** To use Essbase dimensional measures and data, an administrator can set up a connection to Essbase as described in the *Oracle Hyperion Performance Scorecard Administrator's Guide*.

**About Creating Measures**

You perform these tasks to create measures:

- Specify basic information such as the perspective with which measures are associated and the unit that quantifies measure data.
- Define the formulas that calculate result, score, and target values.
- Specify when and how often to collect data.
- Specify the employees who own the measure, enter results, and enter target values.
- Define ranges that evaluate data for the performance indicators that represent measure performance.

**Before Creating Measures**

Perform these tasks before creating measures:

1. **Optional:** To use result and target values in an Essbase database, have your Administrator define and connect to this database.
2. Create units to quantify results. See “Creating Units” on page 78.
3. Create the variables you need for formulas.
4. **Optional:** Identify the highest and lowest scores that measures can achieve. See “Score Limits” on page 83.
5. **Optional:** Create multiple targets to evaluate results differently during other periods of time. See “Creating Targets” on page 78.

6. **Optional:** Create performance indicators if you do not want to use the defaults. See “Creating Performance Indicators” on page 80.

7. **Optional:** Have an administrator create domains that represent the business area with which measures are associated.

8. **Optional:** Create links to Business Intelligence or Intelligence Reports that you want to associate with individual measures. See the *Oracle Hyperion Performance Scorecard Administrator’s Guide*.

---

**Creating Units**

Units quantify results. For example, the unit for product sales per year would be dollars.

To create units:

1. **From the Object View, select Unit List.**
   The Unit List is displayed.

2. **Click Add.**
   The Unit Setup page is displayed.

3. **Enter the name of the unit and a description of the data that it quantifies.**

4. **To create a monetary unit, such as the Swiss franc (CSF), perform these tasks:**
   a. **Select This is a Monetary Unit.**
   b. **Enter the currency code for the unit in Currency Code.**
      If you do not know the code, click **Search**. If you know the first letter on the code, enter the letter followed by an asterisk (*). This lists all codes that begin with that letter. For example, B* lists codes that start with B such as BRL (Brazilian Real).

5. **To use the unit in another Hyperion product application, select the appropriate level of scaling from Scaling for Interoperability.**
   For example, if the unit quantifies measure data in millions of dollars, $millions, select 100 0000.

6. **Click Save.**

---

**Creating Targets**

Targets are the goals that you hope measures will achieve. You can evaluate measure and scorecard performance against different target using the Report Target list on the toolbar.

To create targets:

1. **From the Object View, select Target List.**
2 Click **Add** on the Target List.

3 Enter a name and a description.

4 To evaluate data using the target, make it first in the order.

5 To indicate that the target can have numerous values and thresholds, select **Multi-value Target**. See “Creating Multivalue Targets” on page 79.

6 Click **Next**.

7 **Optional:** To store the target value in another data source, perform these tasks:
   a. Select **Datasources**. The available data sources are displayed.
   b. Click **Edit** beside the datasource to use.
   c. On the Select Dimensions box, expand the outline to select the member that contains the value to use.

8 Click **Save**.

The target is added to the Target List and the Report Target list. You can now calculate data using the target.

### Creating Multivalue Targets

Multivalue targets are those that can have numerous subtargets. For example, a target for a measure that monitors assembly settings such as Approximate Height could contain subtargets for maximum height, average height, and minimum height values. Target Setters can enter values for multivalue targets on the Targets, and Result & Target and tabs of Measure Detail Reports.

1 To create multivalue targets:

2 Perform the steps in “Creating Targets” on page 78, selecting **Multi-value Target**.

3 Click **Add** and enter the name for the first subtarget. For example, if the target to evaluate performance, and you want to specify different performance levels, enter High.

4 Click **OK**.

5 Repeat step 2 to create all the sub-targets for the multivalue target.

6 To change the order in which the sub-targets are shown in reports, select the sub-targets and click **Move Up** or **Move Down**.

7 **Optional:** To use values from an external datasource, perform these tasks:
   a. Click **Edit** beside the data source.
   b. On the Select Dimensions box that is displayed, expand the outline to select the member that contains the target value.
   c. Click **OK**.

8 Click **Save**.
Creating Variables

Variables represent data that changes over time, such as exchange rates. Use variables in formulas to perform calculations using the most recent data.

1. From the Object View, select Variable List.
2. In the Variable List, click Add.
   The Variable Setup page is displayed.
3. In Name, enter the name.
4. In Units, click Select.
5. On the Select Units box, select the unit that quantifies the variable. For example, if you are creating a variable for a monetary exchange rate, select a currency, such as $.
   You return to the Variable Setup page.
6. In Description, summarize how the variable will be used.
7. In Result Collectors, click Select to specify the employees who can enter variable values.
8. On the Select Employee box, select the employees who can enter variable results, and click Apply.
   You return to the Variable Setup page.
9. Click Save.

Creating Performance Indicators

Performance indicators provide an instant visual symbol of the current status of a measure. You can use the default indicators, or import another image.

To determine measure status, you define ranges that evaluate measure results to determine which performance indicator is displayed. To use the same range sets to create other measures, create a named range. See “Creating Named Ranges” on page 81. To use range sets with only one measure, create a custom range. See “Creating Custom Ranges” on page 82.

Tip: If you print reports in black and white, create performance indicators that use shape, instead of color, as their distinguishing feature.

A customize option is also available to select a background color for score cells on these reports:

- Measure Performance
- Scorecard Performance
- Measure Trend
- Scorecard Report
- Scorecard Trend
The background color is selected from the Customization for the reports, and displays the selected color in the report cell for instant impact.

➤ To create performance indicators:

1. From the Object View, select Performance Indicator List.

   The Performance Indicator List is displayed.

2. Click Add.

   The Performance Indicator Setup page is displayed.

3. Under Name, enter a name for the new performance indicator.

4. Optional: Beside Color, click the color box.

   The Color dialog box is displayed. Select the color you want to display as the background in cells and charts for this performance indicator, then click OK. You can select a color sample from the palette, or set the color using HSL or RGB values. This setting does not affect the color of the actual performance indicator.

5. Under Description, summarize the level of performance represented by this indicator.

   The Subrange Setup box is displayed. X represents the result that the measure collects.

6. Beside Upload file, click Browse to navigate to the image file you want to use for the performance indicator, then click Upload File. The selected graphic is displayed beside the Performance Indicator field.

7. Under Default Range, click Add.

8. Define the range by entering numeric values in the boxes and selecting comparison functions from the lists.

   For example, to display the indicator when a measure collects a result between 60 and 85, enter 60 in the first box and 85 in the second box.

   To define formulas for each range boundary, see “Creating Complex Formulas” on page 199.

9. In Order, specify the order in which to display the performance indicator on the Performance Indicator list and report.

10. Click Save.

### Creating Named Ranges

If one range of values reflects the performance of multiple measures, create a named range. You can select this range when you create other measures and scorecards.

**Note:** If you modify a named range, changes are applied to the measures that use the range.

➤ To create named ranges:

1. On the Object View, select Named Range List.
The Named Range List is displayed.

2 **On the Named Range list, click Add.**
   The Named Range Setup box is displayed.

3 **Enter a name and specify how the range is used to determine performance levels.**

4 **In the frame for each performance indicator, click Add.**
   The Subrange Setup box is displayed in which x represents the values (scores for example) that will be evaluated.

5 **Enter the range of values that display the performance indicator and click OK.**
   For example, to display the high performance indicator if results are greater than 85 but less than 95, enter 85, insert the less than symbol, go to the next field, enter the less than symbol, and then enter 95.

   **Tip:** To define formulas for each range boundary, see “Creating Complex Formulas” on page 199

6 **Click Save to return to the Named Range Setup page.**
   To modify ranges, select the range and click Edit.
   To delete ranges, select them and click Delete.

### Creating Custom Ranges

Custom ranges enable you to define ranges that you will use to evaluate only one particular scorecard or measure.

To create custom ranges:

1 **Open the measure, strategy element, accountability element, or employee.**
2 **On the Setup page, select Ranges.**
3 **On the Ranges tab, click Add Range.**
4 **From Range, select Custom.**
5 **Click the Edit button, .**
6 **Enter a name and specify the purpose of the range.**
7 **In the frame for each performance indicator, click Add.**
   The Subrange Setup box is displayed. x represents the measure results or scorecard scores that will be evaluated.
8 **Enter the range of values that display the performance indicator and click OK.**
   For example, to display the high performance indicator if results are greater than 75 but less than 90, enter 75 in the first box, then insert the less than symbol, then in the field after x insert the less than symbol, and then enter 90.
Tip: To define formulas for each range boundary. See “Creating Complex Formulas” on page 199.

9  Click **Save** to return to the Range Setup page.

10 Save your work to use the range with the measure, employee, strategy element, or accountability element.

**Modifying Performance Indicators**

You can customize performance indicators. For example, you can replace the green indicator that represents good performance with another image.

To modify performance indicators:

1  On the **Object View**, select **Performance Indicator List**.

   The Performance Indicator List is displayed.

2  Select the performance indicator and click **Edit**.

   The Performance Indicator Setup page is displayed.

3  **Modify the performance indicator by changing these settings:**
   - Name
   - Image used
   - Range that determines when the performance indicator is used

4  Click **Save**.

**Score Limits**

By default, measures can score between 0 and 100. However, you can modify these defaults to enable scoring below 0 and above 100.

The scoring ranges of other objects that use or display scorecard, measure, and perspective data are updated accordingly. See “Specifying Scoring Limits” on page 107.

**Creating Measures**

Perform these tasks to create measures:

- “Defining General Attributes” on page 84
  
  This could include setting up custom reporting features that apply to the Details Report for the measure, such as embedding external web pages, linking to external web pages, creating and attaching custom reports, replacing default Measure Report tabs with custom reports.

- “Defining Formulas and Frequencies ” on page 85

- “Defining Report Options and Assigning Employees” on page 86
Defining General Attributes

To create measures:

1. **On the Object View, select Measure List.**
2. **On the list that is displayed, click Add.**
3. **In Name, enter a unique name.**
   - If the name is long, enter an abbreviated name in Short Name. This name is used in Initiative Status reports.
4. **Optional:** **Select Primary, if the measure tracks key data that you want to display on the Browser View and in reports.**
5. **From Primary Perspective, select the perspective that best categorizes the measure.**
   - For example, a measure for Product Sales that provides financial data would be associated with the Financial perspective.
   - The perspectives available are those you created when you set up the framework.
6. **Optional:** **To associate the measure with additional perspectives, click Select in Secondary Perspective.**
   - For example, the Product Sales measure could be placed in the Customer perspective because a large number of sales indicates a large customer base.
7. **In Description, enter the purpose of the measure and the data it collects.**
8. **Optional:** **Under Domain, click Select to choose the domain in which to place the measure. If you do not know the domain name, click Search to view all domains.**
9. **Optional:** **To attach links to external Web page or associate the measure with custom reports, see “Using Custom Reporting Options” on page 84.**
10. **Click Next or select Calculations.** See “Defining Formulas and Frequencies” on page 85.

Using Custom Reporting Options

You can customize the Details Report for measures as follows:

- **Attach links to external pages or reports by performing these steps:**
  1. Enter the name of the page or report, or the name to give the link, in **Link Name.**
  2. Enter the URL of the page or report in **Link URL.**
  3. To open pages in individual browser windows, select **Launch in New Window.**
- **Embed external pages or reports in by performing these steps:**
  1. Enter the name of the page or report, or the name to give the link, in **Link Name.**
  2. Enter the URL of the page in **Link URL.**
3. Select Display URL in Tab.
   - Substitute your own reports by replacing the default tabs by entering the appropriate name in Link Name:
     - general—Replace the General tab
     - trendingChart—Replace the Chart tab
     - trendingTable—Replace the Trending Table tab
     - initiatives—Replace the Initiative tab
     - results—Replace the Results tab
     - comparators—Replace the Targets tab
     - reverse—Replace the Part Of tab
     - notes—Replace the Notes tab
     - annotationsInitiatives—Replace the Notes and Initiatives tab
     - resultsAndTargets—Replace the Results and Targets tab

   These reports can also be accessed on the Browser View by right-clicking the measure and selecting View from the context menu.

### Defining Formulas and Frequencies

> To define formulas and frequencies:

1. On the Measure Setup page, select Calculations.
2. Specify how results indicate performance levels:
   - If high results indicate good performance, select High Result.
   - If low results indicate good performance, select Low Result.
3. Click Select in Units to identify the unit that quantifies the measure. For example, a unit for a measure called Total Revenue would be dollars.
4. Click the date selector button, , in Start Date to select the date on which to start collecting results.
5. If results (including period-to-date results) are not entered by a Result Collector using reports, click Select beside Result Formula to define the formula that calculates results. See Appendix B, “Creating Complex Formulas”.
6. Accept the default formula that calculates overall performance using the result and target or click Select beside Score Formula to define a different formula. See Appendix B, “Creating Complex Formulas”.
7. If the result you expect the measure to collect is affected by other data, or if you want to evaluate performance using targets, click Select beside Target Formula.
   
   Each multivalue target you create is listed, enabling you to define a target formula for each.
**Note:** Target values entered by Target Setters using reports override values calculated by formulas.

8 **Optional:** In **Result Source Repository**, enter the name of the source from which to take results. This is purely descriptive text.

For example, if measure data is housed in a General Ledger database, enter the name of the database.

9 **Click Select** beside **Collection Frequency** to choose a frequency that determines the dates on which result values should be entered or available.

The Select Frequency box is displayed. If you use a 52/53–week year, and want to collect results monthly, select Monthly (week-based).

10 **Click Select** beside **Measure Reporting Frequency** to determine the dates with which result values are associated in reports. This frequency determines when collected result values are active in reports.

For example, if company wants track the amount of money made each month on sales they can avoid overlapping with other months by specifying a reporting frequency of monthly, with a period of the last day. This ensures that sales for January, for example, only display in January and not February. If sale figures for each month are not available until the middle of the following month, a collection frequency specifying the 15th of every month ensures that results for each month are associated with that month although they are not collected in that month. For example, although January sale results are not collected until February 15th, they are displayed for January in reports.

11 **Optional:** To give result collectors additional days in which to enter results, enter a value in **Collection Extension**.

12 **Click Select** beside **Target Collection Frequency** to choose a frequency that determines when target values are meant to be entered or calculated.

The Select Frequency box is displayed. If you use a 52/53 week year, and want to collect targets a monthly, select Monthly (week-based).

13 **Click Select** beside **Target Reporting Frequency** to generate a list of dates with which target values are associated in reports. For example, this would enable you to specify that a target value entered in March but applied in June is associated with June in reports.

14 **Optional:** To give target setters more days during which they can enter values, enter a **Target Collection Extension**.

15 **Click Next.** See “**Defining Report Options and Assigning Employees**” on page 86.

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**Defining Report Options and Assigning Employees**

Perform these steps to identify the employees who specify or enter measure data, and to specify how measure data is calculated, evaluated, and displayed on reports. You can also assign employees to measures during employee creation. See “**Assigning Responsibilities**” on page 51.
To define report options and assign employees:

1. On the Measure Setup page, select the number of decimal places to use in reports from **# Decimal Places in Reports**.
   For example, if a measure result is 345.22045, enter 2 to display 345.22.

2. **Optional:** To determine what period is used to trend and compare results, select the period from **Trend Current Period Data Against**.
   For example, to compare the result against that collected five periods ago, select 5 Periods Ago.

3. **Optional:** Perform these steps to apply a period-to-date calculation on data gathered during a period of time, or see “**Creating Period-To-Date Functions**” on page 87.
   a. Select **Perform this operation** and a function:
      For example, to add all values, use the SUM function. You can find the average, highest, or lowest value using the AVERAGE, MAX, and MIN functions respectively.
   b. Specify when to use the function and on what collected data, by selecting a frequency. This must be greater than the collection frequency.
      - Annually—Apply the function to all data points in the last year.
      - Semi-annually—Apply the function to all data points in the last six months
      - Quarterly—Apply the function to the three months within the last quarter to product the quarterly value. For example, if the start date is February 1, the quarter is February, March, and April. For a 52/53–week year, quarters have 13 weeks.
      - Monthly—Apply the function to all data points collected within a month.
      - Weekly—Apply the function to all data points collected in the last week.

4. Click **Select** to identify the employees who own the measure, can enter results and targets, and create annotations. Only the employees assigned as Result Collectors and Target Setters can enter or modify results and targets.
   
   **Note:** These employees can enter data even if they are not in the measure’s domain.

5. Select the employee and click **Apply**.
   You return to the Measure Setup page.

6. Select **Ranges** and see “**Creating Ranges**” on page 88.

### Creating Period-To-Date Functions

Define a period-to-date formula to evaluate measure results collected during a particular period of time. For example, to calculate period-to-date by dividing the measure’s result values by its annual target, you could use this formula:

\[ \frac{\text{sum} (\text{valuesToDate}(result, this, year))}{\text{sum} (\text{valuesToDate}(target, this, year))} \]

**Note:** Period-to-date values that are entered manually override those calculated by formulas.
To create period-to-date formulas:

1. Select **PTD Formula**.
2. Create the formula using a time function in the formula editor. See “Time-Related Functions” on page 212.

### Creating Ranges

Create ranges for performance indicators to evaluate and represent measure performance. If the same range of values assesses the performance of other measures, create a named ranges. See “Creating Named Ranges” on page 81.

To define ranges:

1. On the Measure Setup page, select **Ranges**.
2. Select the data type that determines measure status. For example, to use a calculated period to date value, select **Use PTD results for status**.
3. Click **Add Range** and perform a task:
   - To use a named range, perform these steps:
     1. Click the calendar icon, and select the date on which to use the range.
     2. Select the range from the drop down list.
   - To create a range, perform these steps:
     1. Select **Custom** from the list.
     2. Click the edit button.
        - The Range Setup dialog box is displayed.
        - Click **Add** in the first performance indicator frame.
        - The Subrange Setup dialog box is displayed.
        - Enter the range of values that cause performance indicators to display. For example, if results between 70 and 85 indicate good performance, enter 70 in the first box, then insert the less than symbol, then after x insert the less than symbol, and then enter 85 as the range for the appropriate indicator.
        - Click **OK**.
4. Click **Add** beside the remaining performance indicators and define ranges.
5. Click **Save**.

### Modifying Measures

To modify measures:

1. On the **Object View**, select **Measures** or right-click the measure and select **Edit**.
The Measure List is displayed.

2 Modify measures as follows:
   - Change the name and perspectives with which it is aligned.
   - Place the measure in another domain.
   - Change the formulas that calculate results, scores, and targets.
   - Change the frequencies that determine when and how often to collect results.
   - Assign different employees to the measure or remove assigned employees.
   - Change the ranges used by the performance indicators to evaluate performance.

   See “Creating Measures” on page 83.

3 Click Save.

Copying Measures

To copy measures:

1 On the Object View, select Measure List.
2 On the Measure List, select the measure.
3 Click Copy.

The measures display as Copy of name.

Deleting Measures

To delete measures:

1 From the Object View, select Measure List.
2 On the Measure List, select the measure.
3 Click Delete.
Custom Dimensional Outlines

Dimensions are high-level categories that you can use to logically group related measure data. Dimensions contain members that are items that can be grouped by the dimension. The hierarchies you form with dimensions and members are called custom dimensional outlines.

Create submembers as required. For example, you could create submembers to represent individual manufacturing plants in Cincinnati, Scottsdale, Malaysia, and Poland in the Manufacturing Plants member as shown below.
Dimensional outlines enable you to perform these tasks:

- Create groups that you can use to organize and analyze data by creating dimension that contain lower-level items called members.

- Generate dimensional measures that gather data where dimensions and members intersect. This enables you to collect data using multiple data points, such as Sales by Office.

  Performance Scorecard automatically creates an internal system dimensional outline (system map) that replicates the Strategy Trees, Accountability maps, and Employees that you create. This enables you to use strategy and accountability structures as measure templates from which to generate dimensional measures. See “System Dimensions and System Maps” on page 92.

  You can use result and target values in a Essbase database.

### System Dimensions and System Maps

Although you can create your own, Performance Scorecard automatically generates a dimensional outline that reflects the strategy structures, accountability structures, and employees that you define when you create maps. These internal dimensional representations are called system maps. For example, if you created Accountability maps for Manufacturing Plants, Sales, and Corporate Departments, these maps would be automatically represented as dimensions.
Creating Custom Dimensional Outlines

You can modify the system maps and system dimensions Scorecard creates to represent the employees, strategy structures, and accountability structures that you create. You can also define your own dimensional outlines.

CAUTION: Before creating custom dimensional outlines, review the naming conventions in “Restricted Dimensions, Members, and Alias Characters” on page 197.

To create custom dimensional outlines:

1. On the Object View, select Custom Dimension Setup. The Custom Dimension Setup page is displayed.
2. Right-click on the Dimension Explorer and select Add Dimension.
3. Enter a unique dimension name in the label and press ENTER. The name of the dimension is displayed in the Properties frame.
4. Optional: To use a different dimension name in an Essbase database, enter the name in Alias.
5. Add the members that represent the measures to organize by dimension, to dimensions.
6. Right-click the dimension to which you want to add the member and select Add Dimension Member. A member label is added beneath the dimension.
7. Enter the member name in the label and press ENTER.
8. Describe the purpose of the member measure in Description.
9. Optional: To use a different name in an Essbase database, enter the name in Alias.
10. Click Save.

About Generating Dimensional Measures

Use dimensional measures to gather and analyze data using data points that are represented by dimensions and members. For example, you could monitor product sales by location, employee, and year. Dimensional measures are generated when you attach dimensions and members to a measure template.

You can generate dimensional measures as follows:

- Using system maps that are internal dimensional outlines that represent the strategy and accountability structures used on maps. The structure of these maps act as measure templates.
- Using custom dimensions that you create.

Generating Dimensional Measures

Other than selecting dimensional data, the information you specify to generate dimensional measures is the same as that for non-dimensional measures. You can generate dimensional measures using:
● System maps that represent Strategy Trees and Accountability maps.
● Custom dimensional outlines.

➢ To generate dimensional measures:
1 On the **Object View** select **Measure Template List**. The Measure Template List is displayed.
   You can associate the template with a domain by selecting the template and clicking **Domain Assignment**.
2 Click **Add**. The General tab of Measure Template Setup is displayed.
3 To apply result, score, and target formulas to dimensional measures for the lowest level of members in a dimensional outline, select **Apply to leaves**.
4 Specify standard measure settings. See “Creating Measures” on page 83.
5 Click **Dimensions** and see “Assigning Dimensions” on page 94.

### Assigning Dimensions

➢ To finish generating dimensional measures:
1 **Optional:** To use results and targets in another data source, such as an Essbase database, perform these tasks:
   ● Select the data source from **External Datasource**.
   ● Expand the dimensional outline that is displayed and select the member with the value to use.
2 To perform calculations such as finding the highest score using all data, select a function from **Roll-up Function**. To use the resulting formula for targets, select **Apply to target formulas**.
3 In **Dimensions**, select the members for which to gather data. Your selections are added to **Candidates**. For example this template would enable you to determine the number of sales made in Australia, China, Japan, South Korea, and Taiwan.
Click Save.

Click Reset to undo your selections and return to the original settings.

**Before Modifying Dimensional Outlines**

This section identifies the implications of changing dimensional outlines and deleting dimensions. Review this information before making these modifications.

- If a dimensional measure exists and you move a member to an area on another template, the original dimensional measure is deleted. This means that results are not collected, existing results are deleted, the measure is removed from reports, and new dimensional measure is generated using the template to which the member is now assigned.

- If a dimensional measure does not exist and you move a member to an area on another template, a new dimensional measure is generated using the template to which the member is now assigned based on its new position in the outline.

If you delete a dimension, all related dimensional measures are deleted, and the dimension is removed from its template.

**Modifying Dimensional Outlines**

See "Before Modifying Dimensional Outlines" on page 95 to identify the changes that may occur if you modify dimensional outlines.

➢ To modify custom dimensional outlines:

1. On the Object View, select **Custom Dimension Setup** to display the Dimension Setup page.
2 Perform any task:
   - Change the structure of the outline by dragging and dropping dimensions and members.
   - Add or delete dimensions and members. See “Creating Custom Dimensional Outlines” on page 93.
   - Change the name, description and alias of dimensions and members by selecting them and entering different information in the Properties frame.
3 Click Save.
4 Synchronize changes to dimensional structures when prompted. This could include regenerating dimensional measures.

### About Modifying Measure Templates and Dimensional Measures

Changes you make to measure templates are applied to the dimensional measures they generate. You can edit those dimensional measures individually. You can revert and use the following original dimensional measure settings, defined by the measure template, by using the Reset button. This enables you to undo modifications made to individual dimensional measures generated by the template, and replace them with measure template settings.

- Owners - Individuals ultimately responsible
- Result collectors - Individuals who can enter and modify results
- Annotation creators - Individuals who can attach notes and annotations
- Collection extensions - Days added to the collection frequency for which results can be entered
- Collection frequencies - Dates during which results should be entered or collected
- Target extensions - Days added to the target frequency during which targets can be defined
- Target frequencies - Dates during which targets should be entered or collected
- Comparator setters - Individuals who can define targets and comparators
- Primary and secondary perspectives (range and primary)
- Domain assignments - The geographic or functional domain with which measures are associated
- Period-to-date formulas - The formula that aggregates previous results
- Units - How measures are quantified (dollars, hours, etc.)

For example, if you assigned Ian Brown as the measure template owner, but assigned Adele Reynolds as the owner of a dimensional measure generated by the template, Adele remains the dimensional measure owner regardless of changes to the measure template. To reverse this behavior so that changes to the measure template are applied to all generated dimensional measures, perform these steps:

1. Select the template on the Measure Template List.
2. Click Reset.

3. Click Yes to confirm that you want to undo changes made to individual dimensional measures generated by the templates, and replace them using the measure template settings you’ve defined.

Modifying Measure Templates

To modify measure templates:

1. On the Object View, select Measure Template List.

2. Select the template and click Edit.


4. To use result and target values in another data source, use the Datasource list.

5. To generate different dimensional measures by assigning different dimensions and members, click Dimensions and perform these tasks:
   - To remove members, so corresponding dimensional measures are not generated, remove the members from the Candidates frame.
   - To remove all members, click Uncheck All.
   - To add dimensions and members, select them in the Dimensions frame.

6. Save your changes.

Copying and Deleting Measure Templates

Caution! Deleting measure templates also deletes the dimensional measures that it generates.

To copy or delete measure templates:

1. On the Object View, select Measure Template List.

2. Select the templates.

3. Click Copy or Delete.

Duplicated templates are displayed with Copy of before their name on the Measure Template List.
About Scorecards

Build scorecards to monitor the overall performance of these objects:

- Accountability elements such as departments, divisions, and task forces that represent the reporting hierarchy of your organization.
- Strategy elements such as strategic objectives and critical processes that form levels of corporate strategy.
- Employees

The objects for which you create scorecards are called *subjects*. Although scorecards are automatically created for strategy elements, accountability elements and employees, you can create multiple scorecards to evaluate different aspects of these objects.

You create a scorecard by adding and weighting the measures (dimensional and non-dimensional) and scorecards (for lower-level objects) that reflect the performance of a subject. Thus, you can include the performance of lower levels in your organization in scorecards that evaluate the performance of higher-levels. For example, a scorecard that monitors the performance of Net Profit could use related scorecards such as Sales and Internal Costs. The measures and scorecards you use to build scorecards are called *components*.

The results and scores of scorecard components produce an overall scorecard score that is represented by performance indicators. To evaluate performance using different criteria, you can use the following:

- Multiple, secondary scorecards
- Multiple ranges
Scorecard Types

You can create three kinds of scorecards:

- **Primary**—The most important scorecard out of multiple scorecards associated with an employee, strategy element, or accountability element. If an object has multiple scorecards, the status, score, and trend of the primary scorecard are displayed on the view tabs and in reports.

- **Secondary**—Multiple scorecards used to evaluate and represent employee, strategy element and accountability element performance.

- **Derived**—Scorecards that inherit measures and scorecards from a scorecard template. See “Scorecard Templates” on page 100.

Scorecard Templates

Scorecard templates enable you to evaluate performance across an organization or department using common, uniform criteria. For example, an organization with a head office in Europe, North America, and Australia may want to assess performance in these areas using common measures for risk factors and controls, and then other, functionally—specific, measures. To gauge the performance in Europe, North America and Australia using common criteria, create a scorecard template that contains risk factors and control measures. Then attach the template to the lower-level scorecards associated with each head office. This would establish this scorecard composition:

- **Europe**
  - Common measures inherited from template: Risk Factors and Controls
  - Office-specific measures: Currency Controls and Booked Rate

- **North America**
  - Common measures from template: Risk Factors and Controls
  - Office-specific measures: Employee Turnover and Run Rate

- **Australia**
  - Common measures from template: Risk Factors and Controls
  - Office-specific measures: Sales Programs and Execution

See “Creating Scorecard Templates” on page 102.

Lock scorecard templates to prevent others from adding to, or changing, the components scorecards inherit from a scorecard template.

Perform these steps to directly assign scorecard templates to strategy and accountability element scorecards from maps:

1. From the Object View, select the map on which the element resides.
2. Right-click the element.
3. Select **Set Template**.
Weights

You assign a weight to each component to indicate how much the component impacts the overall performance of the scorecard. For example, on a scorecard that evaluates the efficiency of a Quality Assurance team, these measures might be considered more important and have higher weightings:

- Number of features tested
- Number of defects logged
- Number of client cases resolved

Ranges and Performance Indicators

Performance indicators are images that symbolize the performance levels of scorecards and measures. Different performance levels are determined by the ranges attached to each indicator.

For example, if a high level of performance is achieved by scorecards with scores between 75 and 90, specify a range of 74, less than symbol, x, less than symbol, 89 for the indicator that represents good performance.

To use the same ranges to build other scorecards, create a named range. See “Creating Named Ranges ” on page 81. To create ranges for use with only one scorecard, create a custom range. See “Creating Custom Ranges” on page 82.

Before Creating Scorecards

Perform these tasks before creating scorecards:

- Create the measures that reflect the performance of the scorecard subject. You build the scorecard using these measures. See “Creating Measures ” on page 83.
- Create a named range if the scores that evaluate performance are used with other scorecards. See “Creating Named Ranges ” on page 81.
- Optional: Create scorecard templates to apply standard organizational measures or scorecards. See “Creating Scorecard Templates” on page 102.
- Optional: Create categories to organize logically-related scorecards. Scorecards are displayed in these categories on the Browser View and in reports.
- Optional: Specify these preferences:
  - The highest and lowest scores scorecards can achieve. See “Score Limits” on page 83.
  - How to calculate scores if data for scorecard components is old or missing. See “Using Uncollected or Unavailable Data ” on page 108.
Creating Scorecard Templates

Use scorecard templates to apply standard or generic measures and scorecards to new scorecards.

To create scorecard templates:

1. From the Object View, select **Scorecard Template List**. The Scorecard Template List is displayed.
2. Click **Add**. The Scorecard Template page is displayed.
3. Enter a template name.
4. Assign the lowest weight for the template in **Minimum Weight**. This is the lowest amount the template components contribute to a derived scorecard. You can increase the weight.
   
   For example, if the template uses two scorecards that, together, should contribute 30% to any derived scorecard score, enter 30.
5. To prevent others from adding components to scorecards derived from the template, select **Locked**.
6. Add components as follows:
   - To add dimensional measures, click **Add Measure Template**, select the template and click **Add**.
   - To add scorecards, click **Add Scorecards**. The Select Scorecard box is displayed in which scorecards are grouped by type. Select a scorecard and click **Add**.
   - To add non-dimensional measures that are particular to the object, select **Advanced**. The Select Measure box is displayed. Select a measure and click **Add**.

   You return to the Scorecard Template Setup page.
7. Indicate how much the score of each component impacts scorecard performance by entering weights in the **Weight** column.
8. **Optional**: Perform a task:
   - To assign the same weight to all components, click **Equalize**.
   - To have components weights add to 100%, click **Normalize**.
9. Save your work.

Use the template to create scorecards that inherit the specified components. See “Creating Scorecards” on page 103.

About Creating Scorecards

You perform these steps to create scorecards:

1. **Optional**: Attach a scorecard template to apply standard measures and scorecards.
2. Add components to the scorecard.
3. Identify the importance of each component by assigning it a weight. You cannot assign a weight to components inherited from a scorecard template.
4. Define the ranges of score values that indicate levels of performance.

5. Specify the dimensional context of the scorecard by selecting the members to use in scorecard calculations. These are the dimensions and members you associated with elements and employees on their Setup pages.

Creating Scorecards

Create scorecards to evaluate and monitor the performance of strategy elements, accountability elements, and employees. Define multiple scorecards for these objects to assess performance using different criteria.

To create scorecards:

1. From the Object View, select the subject as follows:
   - For a primary strategy or accountability element scorecard, perform these steps:
     a. Select Strategy Trees or Accountability Maps.
     b. Expand the hierarchy, select the element, and click the Scorecard tab on the page that is displayed.
   - For a secondary strategy or accountability element scorecard, perform these steps:
     a. Select Strategy Trees or Accountability Maps.
     b. Expand the hierarchy, select the element, and then select the Scorecards folder.
     c. Right-click Scorecards, and select Add.
   - To create an employee scorecard:
     a. Select Employee List.
     b. Perform a task:
        - For a primary scorecard, select the employee and then select the Scorecard tab on the Employee Profile page that is displayed.
        - For a secondary scorecard, right-click the Scorecards folder beneath the employee, and select Add.

2. Optional: To add components from a scorecard template click Select in Template and choose the template.

   All template components are added to the scorecard. You cannot modify weights.
   If the template is locked, you cannot add measures and scorecards, or modify those inherited from a template.

3. Optional: Select Primary if you are a manager creating a scorecard to evaluate the performance of an employee.

4. See “Adding Components” on page 104.
Adding Components

To place components on scorecards:

1. **On the Scorecard Setup page, click Add Measure(s).**
   
The Select Measures box is displayed, in which measures are listed as follows:
   
   - Individually (for non-dimensional measures)
   - In folders (for dimensional measures). The templates or system dimensions that were used to generate the measures are displayed as columns.

   **Caution!** Do not add a measure template to a scorecard.

2. **To select dimensional measures, expand the appropriate folders.**
   
The dimensional data that each measure monitors is displayed. The current selection icon, indicates the item that you clicked to navigate a dimension.

   To only display members for the dimensions that you assigned to the element or employee when you created it, select Show Only Matching Dimensionality.

3. **Select a measure and click Add.**

4. **Click Close Window.**
   
The measures are organized by perspective on the scorecard. Reorganize measures in the same perspective by dragging and dropping.

5. **To include the performance of other objects, as represented by their scorecards:**
   
a. Click Add Scorecard(s). The Select Scorecard box is displayed.
   
The Select Scorecards box is displayed. Scorecards are displayed by type in folders.
   
b. Expand each group to select a scorecard.
   
c. Select each scorecard and click Add or double-click.
   
d. Click Close Window.
   
   Scorecards you add are displayed as unassigned on the Scorecard Setup page.

6. **Assign weights to components by double clicking in Weight.**

7. **Click Range and see “Defining Ranges” on page 104.**

Defining Ranges

Ranges evaluate scorecard scores to reflect levels of performance. You can assign multiple ranges to scorecards to evaluate performance differently during different times.

➢ To define ranges:

1. **On the Scorecard Setup page, select Range.**
2  Click Add Range and click the calendar button, , to specify the date on which to use the range to assess performance.

3  Perform a task:
   - Recommended: To use a named range, select it from the list. See “Creating Named Ranges” on page 81.
   - To create a range only for the scorecard, select Custom and click the Edit button,

Performance indicators and range frames are displayed.

4  Click Add in the first indicator frame.

The Subrange Setup box is displayed in which \( X \) represents the scorecard score.

5  Enter a range of scores that, if achieved, cause each performance indicator to display.

For example, if scores between 70 to 90 indicate high performance:
   a. Click Add in the frame for the performance indicator that represents high performance.
   b. Enter 70, then the less than symbol, than \( x \), then the less than symbol, and then 90.
      To define formulas for range boundaries, see “Creating Complex Formulas” on page 199.
   c. Click OK.

6  Repeat step 5 to specify ranges for the other performance indicators.

7  Optional: Select Miscellaneous to perform these tasks:
   - For secondary scorecards: Specify the employees who cannot access the scorecard. See “Restricting Access to Secondary Scorecards” on page 105.
   - If you used dimensional measures: Select the dimensions and members to use in scorecard calculations.
   - To place the scorecard in a category, click Select in Categories List. The scorecard is displayed in the category you choose on the Browser View and in reports.

**Restricting Access to Secondary Scorecards**

Secondary scorecards are those used by employees to monitor measures, strategy elements, and accountability elements. You can restrict access to these scorecards as follows:

   - To grant access only to employees who own, manage, or are members of the element, select All accessors of owning object.

   - To grant access only to employees who can view the primary scorecard, select Selected employees from owning accessors and click Select to choose the employees.

To allow these employees to modify the scorecard, select Able to Edit.
Modifying Scorecards

➤ To modify scorecards:

1. Access the Scorecard Setup page.

2. Perform any task:
   - To remove components, select the component and click Remove. You cannot remove components inherited from a scorecard template. If prompted, synchronize the dimensional context of scorecards and regenerate dimensional measures to reflect this change.
   - Add or remove dimensions and members on the General tab. If prompted, regenerate dimensional measures to reflect this change.
   - To use another range to evaluate scores, select Ranges and apply a named range or create a range. See “Defining Ranges” on page 104.

3. Click Save.
About Preferences

There are two kinds of preferences:

- Application preferences, such as the following that apply to entire applications:
  - Measure and target result collection (if not specified during measure creation)
  - Calculation settings that determine how calculations are performed if values are unavailable
  - Calendar preferences, such as the day on which the fiscal year begins

  These changes do not override personal preferences specified by other users. See “Applying Application Preferences” on page 107.

- Personal preferences that govern some display settings such as date formats, how measure confidence is indicated, and the tab on which Performance Scorecard opens. See “Applying Personal Preferences” on page 114.

Applying Application Preferences

You perform the following tasks to customize default preferences. You must use the designer account or have the designer role assigned to your account.

Specifying Scoring Limits

By default, the lowest score a measure or scorecard can have is 0, and the highest score it can have is 100. You can modify these limits to enable scoring below 0 and above 100. If you modify scoring limits, all other measures, perspectives, and scorecards are updated.
To define scoring limits:
1. Select **File**, and then **Scorecard Configuration**.
2. Select the **Scoring Limits** tab.
3. Select **Enable Score Limits**.
4. In **Lower Score Limit**, enter the lowest score that a measure or a scorecard can achieve.
5. In **Upper Score Limit**, enter the highest score that a measure or a scorecard can achieve.
6. Indicate how to use the limits:
   - To use the limits only when scores are displayed on reports, select **Apply Limits to Scores When Displayed**.
   - To apply the limits to scores whenever used, including when they are references in a formula, select **Apply limits to scores in calculation**.
     If you select this option, the results, scores, and status of all measures and scorecards are recalculated.

**Using Uncollected or Unavailable Data**

This topic describes how to perform measure and scorecard calculations if the measures involved do not have results (are NO VALUE) or have old results and targets (outdated). It also describes how to indicate these values in reports.

The preferences you apply are used in all measure, target, and scorecard calculations.

To perform calculations using old or missing data:
1. Select **File**, and then **Scorecard Configuration**.
2. Select the **Outdated Data Handling** tab.
3. In **Outdated Measure Result Data**, indicate another value to use if a current value is unavailable. You have these options:
   - Use most recently collected value—Represent missing data using a double-dash or text that you enter in Text to use for unavailable value.
   - Use a result collected in a previous year’s equivalent period—Use the result collected in this period last year. For example, if today is August 4, 2008 and a result was meant to be collected on August 1, the result collected on August 4 2007 is used. If a result was unavailable on August 4 2007, the result collected on Aug. 4 2006 is used.
   - Use this substitute value—Enter a value, such as Ø, to represent the missing result.
   - Display period-to-date value for previous period until result entered for current period—Use the most recent result collected based on a period-to-date function. This setting enables you to use a result from a previous period until a new result is collected.
4. Optional: To treat old target values in the same way, select **Apply to outdated target value**.
5. To exclude measures without results from all calculations, perform these tasks:
a. Select Ignore Missing Values (formulas and scorecard calculations). This affects operations in calculations as follows:
   - Addition or subtraction—Operands evaluating to no value are 0
   - Multiplication—Operands evaluating to no value are 1
   - Percent—Applying operation to no-value items evaluate to no value
   - OR or NOT conditions—Operands evaluating to no value are considered false
b. Select an option that determines how to calculate scores if values are missing:
   - Redistribute weight to other scorecard components—Calculate a score that compensates for a missing value by assigning the weight among the other scorecard components. Scorecards realistically reflect performance if results of heavily weighted measures are missing.
   - Do not include the component in the score calculation—Exclude the missing score from calculations and treat it as having a 0 score.

6 Click Save.

Specifying Measure and Target Frequencies

This topic describes how to apply frequency settings that determine when result and target values are expected to be entered, and the dates of which they are reflective. Your preferences are not applied to measures for which frequencies were defined.

To apply frequencies:
1 Select File, and then Scorecard Configuration.
2 Select the Dates and Frequency tab.
3 Apply the frequencies:
   - Collection Frequency—When result collectors are expected to enter result values, or when result values are meant to be available.
   - Measure Reporting Frequency—Dates of which result values are reflective. This enables you to ensure, for example, that sales figures for January are associated with January in reports even though result values are not entered until February.
   - Collection Extension—Time, in days, during which result values can be entered. For example, result collectors for a measure with a collection date of May 26 and a collection extension of three days, can enter results until May 29.
4 If you defined a measure reporting frequency, specify the date with which to associate result values gathered after the collection frequency:
   - Associate collection dates after result dates—Display result values after dates generated by the collection frequency.
   - Associate collection dates before result dates—Display result values before dates generated by the collection frequency.
5 Apply the target frequencies: see.
- **Target Collection Frequency**—When target values are meant or expected be entered.

- **Target Reporting Frequency**—Dates of which target values are reflective. This enables you to ensure, for example, that quarter-specific target values are associated with the correct month on reports, even if target values are not manually entered or gathered during that financial quarter.

- **Associate collection dates before result dates**—Display target values before dates generated by the collection frequency.

  - **Target Collection Extension**—Time, in days, during which targets values can be entered. For example, a target setter for a measure that has a collection date of September 15 and a collection extension of 6, has until September 21 to enter target values.

---

6. **If you defined a target reporting frequency, specify the date with which to associate target values gathered after the collection frequency:**

   - **Associate collection dates after result dates**—Display target values after dates generated by the collection frequency.

   - **Associate collection dates before result dates**—Display target values before dates generated by the collection frequency.

7. **Click Save.**

---

### Specifying the Fiscal Year Start Date

Performance Scorecard uses a fiscal year start date of January 1. However, you can modify this date if your organization does not start its financial year on January 1. Changing the fiscal year start date affects when measure results are collected as follows:

- **For measures with a semi annual frequency**—The collection points of January and July are shifted by the number of months and days defined by the fiscal year start date. For example, if the fiscal year begins on February 6, the collection points are offset by one month and five days. Results are collected on February 6 and August.

- **For measures with a quarterly frequency**—The collection points of January, April, July and October 1st are shifted by the number of months and days defined by the fiscal year start date. For example, if the fiscal year begins on March 1st, collection points would be shifted by two months. Results are collected on March 1, June 1st, September 1, and December 1.

- **For measures with a semi-monthly frequency**—The collection points are shifted by the number of days based on the fiscal year start date. For example, if the fiscal year begins on March 4, results are collected on the 19 and the 4 of each month.

- **For measures with a monthly frequency**—The collection points are shifted by the number of days defined by the fiscal year start date. For example, if the fiscal year begins on January 15, results are collected on the fifteenth day of each month.

---

1. **To specify the fiscal year start date:**

   1. Select File, and then **Scorecard Configuration**.
2. Select the **Dates and Frequency** tab.

3. In **Fiscal Year Start Date**, click the calendar icon, to choose the day on which the fiscal year begins.

4. Click **Apply**.

5. Click **Save**.

---

### Using a 52–Week Year

If your organization is in the retail industry and government sector you can use a 52 week year, in which weeks are distributed in repeating cycles of 4 and 5. To use a 52–week year, select one of these distribution cycles. The cycle specifies the number of weeks in each of the three months used.

- 4-4-5
- 4-5-4
- 5-4-4

For example, the 4-4-5 distribution specifies that the first month has four weeks, the second month four weeks, and the last month five weeks. If you use a 52–week year, quarterly and semi-annual frequencies change from being month-based to week-based. For example, a quarterly frequency becomes 13 weeks, instead of being three months.

Measures that use a quarterly or semi-annual frequency are also modified, as follows:

- The quarterly frequency generates an expected collection date every thirteen weeks instead of every three months.
- The semi-annual frequency generates an expected collection date every 26 weeks.

**Note:** Results previously collecting using these frequencies are not associated with the new collection dates generated by the year type.

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➢ To use a 52–week year:

1. Select **File**, and then **Scorecard Configuration**.

2. Select the **Dates and Frequency** tab.

3. In **Fiscal Year Start Date**, click the calendar icon, to choose the day on which the fiscal year begins.

4. From **Year Type**, select **52/53 Week**.

5. From **Weeks per month**, select the option that specifies how to allocate the month with the extra week in the quarter.

   For example, if the first month in the quarter contains five weeks, the second month four weeks, and the third month four weeks, select 5-4-4.

6. Beside 53 week years, click **Select** to select the years in which to apply the extra week.

7. Click **Apply**.
Linking to External Web Pages or Custom Reports

You can personalize and extend your application by adding links to external Web pages or custom reports. The links you add are displayed in the Custom Reports folder on the Browser View.

To link to external pages and reports:
1. Select File, and then Scorecard Configuration.
2. Select the Reports tab.
3. To add link to external web pages or custom reports, perform these tasks:
   a. Click Add.
   b. In Reports Name, enter the name of the Web page or report.
   c. In Reports URL, enter the URL of the Web page or report.
   d. To display the Web page or report in a separate browser window, select Launch New Window.
4. Click Save.

Creating Generic and Custom Interactive Reporting Reports

You can create and then add links to these kinds of Interactive Reporting reports that you can populate with Performance Scorecard data.

- Scorecard report—Provides the details of the selected employee scorecard. This report displays both measures and dimensional measures. You can view all, or some of the available scorecards. The details are presented in table and graphical format.
- Strategy scorecard—Provides an overview of the components of the strategic objectives, including a graphic display of the current results versus targets for a selected measure. The dashboard offers the opportunity to view the current progress of the strategy, add notes regarding the analysis, opportunities and issues that apply to the strategy, and to view actions or strategic initiatives.
- Scorecard (Measure Trend)—Provides the Trending Table details for one or more measures on the selected scorecard. You can view all, or some of the available scorecards. The details are presented in a table format, and the values and performance indicator enable you to evaluate the trend for the selected measure for the specified date or date range.

Each report is generated by a pre-formatted BQY file that specifies the Smart Cut parameters used to generate the report. You can modify the BQY files used for the default reports as a starting place to create your own customized reports. See “Default Generated Reports” on page 226.

You can also create reports that enable you to design personal views of measure and scorecard data.
Any custom reports you create are displayed in the Custom Reports folder on the Browser View.

**Specifying Scorecard Display Preferences**

This topic describes how to display measures on scorecards alphabetically, or in the order in which they were placed on the scorecard.

1. To specify scorecard measure preferences:
   1. Select **File**, and then **Scorecard Configuration**
   2. Select an option:
      - To display measures in the order in which they were added to a scorecard, select *The order they were placed on a scorecard*.
      - To display measures alphabetically, select *Alphabetically by name*.
   3. To include the scores of lower-level map elements that are on the scorecard of a higher level map element, even if scores for the lower-level elements are not available, select *When calculating scorecard’s lowest descendant, include children without scores*.
   4. To display scorecards that are accessed from maps in a separate browser window, select *When opening scorecards from maps, open in new window*.
   5. Click **Save**.

   Scorecard measures are now displayed in reports based on the option you selected.

**Creating Reporting Periods and Categories**

Create a reporting period, such as a financial quarter with which users can associate notes and annotations. This enables users to organize notes and annotations based on the context, such as a corporate event, in which they were generated.

This topic also explains how to define categories that users can use to filter notes and annotations.

1. To set up a reporting period and categories:
   1. Select **File**, then **Scorecard Configuration**, and then **Notes**.
   2. To prevent users from creating or modifying annotations that are attached to locked measures, select *Lock annotations when Measure results are locked*.
   3. In **Add Reporting Periods**, click **Add**, to select the start date of the reporting period, such as a week-long corporate event.
   4. In **Display**, enter the name of the reporting period. For example, this could be the name of a corporate event such as a sales drive.
   5. Repeat steps 3 and 4 to create all reporting periods.
   6. Select **Enabled** to activate the reporting period(s).

   To remove a reporting period, click the adjacent **Delete** button.
7 In Add Categories, click Add.

To remove a category, click the adjacent Delete button.

8 Click Save.

Users can now perform these tasks:

- Place a note or annotation in one of the categories that you defined
- Sort notes and annotations using the categories that you defined
- Associate notes or annotations with a reporting period that you defined

**Applying Personal Preferences**

To specify personal preferences:

1 Select File, then Preferences, and then Scorecard Preferences.

2 To override the defaults, select My user preferences.

3 Select your preferences:

- **View panel links are sticky**—Record the last employee, measure, accountability element or strategy element page that you viewed. During your current, but not subsequent sessions, that page is automatically displayed.

- **Date format short**—Specify how shortened dates are displayed. Enter the format in which you want to display dates. For example, if today is January 15 2008, entering yy MMM dd displays the date as 08 Jan 15.

- **Date format long**—Specify how full dates are displayed.

- **Disable day selection in calendar**—Prevent users from selecting dates using calendars.

- **Display dimensional measure data confidence**—Reflect the amount of missing results that impacts composite and dimensional measure performance. Confidence indicators display beside measures on the Browser View. You can display data confidence as a percent or fraction.

- **Default view tab**—Tab on which to open Performance Scorecard.

4 Click Save.
Part II

Part 2: Collaborating and Communicating Using Initiatives, Alerts, and Notes

In Part 2: Collaborating and Communicating Using Initiatives, Alerts, and Notes:

- Using Initiatives
- Using Notes and Annotations
- Using Alerts
Viewing Initiative Data

Initiatives are tasks that can be prioritized, and that must be completed within a certain period of time. You can assign initiatives to measures, scorecards, strategy elements, and accountability elements. Initiatives can act as project milestones because they reflect performance toward a specific outcome. Create initiatives to gather the elements and tasks together to achieve a particular goal, project or objective. By drawing together the measures, scorecards, and objectives into a single view, you have a master perspective of the progress of all elements towards the initiative's goal. This makes it easier to identify potential issue and obtain a more comprehensive understanding of the initiative because you can examine all involved factors.

Each initiative must have a reporting period, during which annotations can be associated with the initiative. Initiatives must also be grouped by category for logical display. As initiatives progress, update their status (such as partially complete or planned due date) to reflect the performance and position of the factors involved. Administrators can specify the tasks users can perform with initiatives, such as creating, updating, and deleting.

Requirements

Before creating initiatives, set up the appropriate category and priority. See “Creating Category Types” on page 118.
**Category Types**

Initiative Status Categories are used to group initiatives, based on their current status or requirements. You can create your own categories, or use these default categories:

- **Status**—Group initiatives based on their status (not started, complete, or in progress).
- **Type**—Group initiatives based on any custom criteria that you defined.
- **Priority**—Group initiatives by level of urgency or importance.

**Creating Category Types**

To create types:

1. **From the Object View, select Category, and then type.**
   A list displays any existing categories of that type.
2. **Click Add.**
3. **Enter this information:**
   - Name for the category such as high priority or delayed.
   - Description of why you are using the category to organize initiatives.
   - The order in which to display the category.
4. **Click Save.**

**Creating Initiatives**

An initiative is a task that can be prioritized, and must be completed within a certain period of time. You can assign the task to measures, scorecards, strategy elements, and accountability elements. Initiatives can act as project milestones because they reflect performance toward a specific outcome.

To create initiatives:

1. **From the Browser View, select the element or measure.**
2. **On the report that is displayed, select Initiatives.**
   The Initiatives tab is displayed. Any initiatives that have been created are listed.
3. **Right-click and select Add to create a new initiative.**
   The Initiative Setup page is displayed providing details such as time-dependant information, variables, members, completion date and so on.
4. **In Name, enter the initiative name.**
5. **In Dependencies, review the other objects and factors involved:**
   - Parent initiative (if applicable)
- Participating objects to which the initiative is attached
- Types of participating objects, such as accountability elements

6 In **Description**, summarize the purpose of the initiative.
7 From **Type**, select the kind of initiative.
8 From **Priority**, select a level that represents the importance of initiative.
9 Click **Active** to launch the initiative.
10 In **Owners**, click **Select** to choose the employees responsible for the initiative and click **Apply**.
11 **Optional:** Under **Members**, select the employees participating or associated with the initiative. See “Creating Initiatives” on page 118.
12 **Optional:** Under **Notify**, select the employees to notify by alert, regarding changes to or the progress of the initiative.
13 In **Cost**, enter the actual or estimated value required to implement the initiative. Click **Select Unit** to choose a quantifying unit, such as $000s or # Employees.
14 In **Effort**, enter the days required to complete the initiative. Use a decimal. For example 10.0 person days. Click **Select Unit** to attach a unit to the value, such as $000s or # Employees.
15 **Optional:** To attach a file, click **Upload Attachment**, and **Browse**. Select the file and click **Upload**.
16 **Do not specify a Completion Date**.
17 Beside **Initiative Data**, use the arrows to specify the reporting period. This defines the intervals during which annotations can be associated with the initiative.
18 In **Start Date** and **Due Date**, click the calendar button, to select the day on which the initiative begins and the date by which it should be completed.
19 In **% Complete**, accept the default value.
20 From **Status Symbol**, select Not Started. As progress is made, you can select a performance status.
21 Under **Annotation**, enter an annotation to be associated with this initiative. If the initiative spans multiple reporting periods or cycles, attach annotations for each cycle. The annotations are updated during the initiative to monitor the project status and input.
22 Click **Save**.
23 Repeat Step 18 to Step 24 to add additional reporting periods.
24 Click **Save**.

### Updating and Modifying Initiatives

Although you can update initiative at any time, the information in **Initiative Data** such as percentage complete, is used to track progress. You must be the owner or creator of an initiative to update it.
To update initiatives:

1. **Perform a task:**
   - From the Browser View or any report, click the object to which the initiative is assigned. Click **Initiatives** and then select the initiative to update.
   - From the Browser View, select **Reports**, then **Initiative Status**. Right-click the initiative and select **Edit**.

2. Change the appropriate settings. See “Creating Initiatives” on page 118.

3. Click **Save**.

### Deleting Initiatives

If an initiative is assigned to multiple objects, you can choose to remove it only from the current object or from all objects.

To delete initiatives:

1. From the Browser View or report, select the object to which the initiative is assigned.
2. On the report that is displayed, select **Initiative**.
3. Select the initiative, right-click, and select **Delete**.
4. Respond to the Confirmation message:
   - If the initiative is not assigned to other objects, click **OK**.
   - To only remove the initiative only from the current object, click **No**.
   - To delete the initiative from all objects to which it is assigned, click **Yes**.

### Creating Initiative Hierarchy and Dependencies

You can refine large or complex initiatives by creating lower-level, contributing child initiatives. This enables you to break down complex initiatives into a series of steps. Sub initiatives share the characteristics of the parent initiative, but their status does not roll up to the parent initiative.

To add sub initiatives to initiatives:

1. From the Browser View or any report, select the object to which the parent initiative is attached.
2. On the report that is displayed, select **Initiative**.
3. Right-click the initiative and select **Add**.
   
   The Initiative Setup page is displayed.

4. The high-level parent initiative is identified as a dependency.
5. Define the subinitiative. See “Creating Initiatives” on page 118
6. Click **Save**.
**Copying Initiatives**

You can copy initiatives to create duplicates that you can assign to another element scorecard or measure.

To copy initiatives:

1. From the Browser View, select the element scorecard or measure.
2. Select Initiative.
3. Right-click the initiative and select Copy.
4. Right-click again and select Paste and then Copy.

A copy of the initiative is added to the scorecard or measure.

**Linking Initiatives**

You can link initiatives to other elements or measures, according to these rules:

- If an initiative has no current parent initiative, it can be linked to any parent freely.
- If an initiative already has a parent, it can only be linked to other owning objects at the top level.
- If an initiative is linked to multiple owning objects, it can be moved to have a different parent; however, the original parent, new parent and child initiative must all be attached to the same parent.

To link initiatives:

1. From the Browser View, select the object that has the initiative to link.
2. Select Initiative.
3. Right-click the initiative and select Copy.
4. In the Browser View, navigate to the scorecard or measure to which to link the initiative.
5. Select Initiative.
6. Right-click, select Paste and then Link.

The initiative is added to the new scorecard or measure, and the initiatives are linked.

7. Right-click and select View.

The View Initiative is displayed, showing the linked owning objects under Dependencies.

**Customizing Initiative Report Data**

These views enable you to present different initiative information:

- Static View—Displays data that does not change.
● Trend View—Displays progress and performance related changes, such as percentage complete.

To customize initiative views:
1. From the Browser View, select Reports, then Initiative Status.
2. On the report that is displayed, select Edit, then Customize.
3. Select the view to use, and the data to display as outlined in this table.

### Table 1  Initiative Data

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set System Defaults</td>
<td>Application or generic designers: Select to apply customizations to all other users.</td>
</tr>
<tr>
<td>Group by associated object type</td>
<td>Groups initiatives by measure, accountability element or strategy element.</td>
</tr>
<tr>
<td>Show trend view as default</td>
<td>Displays tracking information such as percentage complete and status.</td>
</tr>
<tr>
<td>Name</td>
<td>Displays initiative names</td>
</tr>
<tr>
<td>Status symbol</td>
<td>Displays performance indicators representing initiative status.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Displays when initiatives start.</td>
</tr>
<tr>
<td>Completion date</td>
<td>Displays the date on which initiatives were completed.</td>
</tr>
<tr>
<td>Cost</td>
<td>Displays the cost (in dollars) of initiatives.</td>
</tr>
<tr>
<td>Creator</td>
<td>Identifies the employees who created initiatives.</td>
</tr>
<tr>
<td>Status</td>
<td>Displays the current status, such as “In Progress”.</td>
</tr>
<tr>
<td>Priority</td>
<td>Displays initiative priority. 1 indicates the highest level of priority.</td>
</tr>
<tr>
<td>Original Due Date</td>
<td>Displays the first date by which initiatives were meant to be completed.</td>
</tr>
<tr>
<td>Revised Due Date</td>
<td>Displays adjusted completion dates.</td>
</tr>
<tr>
<td>Due Date</td>
<td>Displays the date by which initiatives must be completed.</td>
</tr>
<tr>
<td>Percent completed</td>
<td>Displays completion status as a percentage.</td>
</tr>
<tr>
<td>Effort</td>
<td>Display the cost (in work days) estimate for initiatives.</td>
</tr>
<tr>
<td>Owner</td>
<td>Displays the employees assigned to initiatives.</td>
</tr>
<tr>
<td>Associated to</td>
<td>Displays the objects with which the initiative is associated.</td>
</tr>
<tr>
<td>Name</td>
<td>Displays the name of each initiative.</td>
</tr>
<tr>
<td>Owner</td>
<td>Displays the name of the owner of the initiative.</td>
</tr>
<tr>
<td>Due Date</td>
<td>Displays the expected completion date for the initiative.</td>
</tr>
<tr>
<td>Revised Due Date</td>
<td>Display the last revised due date for the initiative.</td>
</tr>
</tbody>
</table>
4  Click **Save**.

5  **Optional:** Arrange the layout as follows:
   - Move columns by clicking the column header and dragging it to another location.
   - To sort data, double-click the column header.
About Notes

Notes and discussion threads enable everyone in your company to share information, suggestions, and opinions about the measures and scorecards to which they have access. You can create and attach notes to scorecards, measures, accountability elements and strategy elements. Annotations enable you to group notes and discussion threads by reporting periods. Annotations can only be created only by an annotation creator.

See:

- “Creating Notes ” on page 126
- “Replying to Notes ” on page 126
- “Modifying Notes ” on page 127
- “Deleting Notes” on page 127
- “Accessing Notes from the General Forum” on page 125

Accessing Notes from the General Forum

In the General Forum, you can view notes for the objects such as employees, measures, and scorecards that you are authorized to view. You can post and reply to notes attached to these objects. To quickly find notes in the forum, see“Searching for Notes ” on page 128.

To access the general forum:

1. Select Forum, and then General Forum.
2. Organize and filter the information as follows:
   - By Group, using topic, author, category, and date options.
   - Show Only, using a filter:
     - Watched to display forums that contain notes or discussion threads that you flagged to monitor.
New to display only unread notes.

Last x Days to display forums that contain notes created during a past number of days. For example, to view notes created in the past week, double-click Last x Days and enter 7.

3 If authorized, you can perform these tasks:
   - Respond to notes. See “Replying to Notes” on page 126.
   - Edit your notes. See “Modifying Notes” on page 127.
   - Remove your notes. See “Deleting Notes” on page 127.

Creating Notes

To create notes for objects:
1 From the Browser View, select the object. The business object is opened in the Contents pane.
   Sort existing notes and discussion threads using the filters.
2 Click Post New Notes. A Post New Note area is added.
3 In Subject, enter the name of the note.
4 From Category, select a grouping that best represents the note contents. Administrators can customize these categories.
5 In Contents, enter the message.
   You can use HTML tags within the text of the new note. For information about using HTML tags, refer to any online HTML resource.
   Optional: To add an attachment, such as a PowerPoint presentation or Microsoft Word document, click Browse, select the file, and click Upload.
6 Click Save.
   Your note is added.

Replying to Notes

You can reply to a note, discussion thread, or another reply, to attach additional comments or documents to the original note.

To reply to notes:
1 From the Browser View, select the object to which the note applies.
   The Details page for the object is displayed.
2 Select Notes.
3 Locate the note to which you want to reply.
   - You can filter notes by topic, author, category, and date.
Under Show Only, select filters:

- Watched to display forums that contain notes or discussion threads that have been flagged as being watched.
- New to display all new, unread notes.
- Last x Days to display forums that contain messages that were created in the last specified number of days. To specify the number of days, click Last x Days. The Topics Filter Setup dialog box is displayed. Enter the number of days for which you want to filter notes, then click Save.

4 Click the Reply button adjacent to the note.
A Post New Note area is added to the page.

5 In Subject, enter a subject for your response.
6 From Category, select the category that best represents the content of the response.
7 In Contents, enter the body of the response.

Tip: You can use HTML tags in this frame. For information, refer to any online HTML resource.

8 To attach a file, click Browse to select the file, then click Upload.
9 Click Save.
The response is added to the notes list. Expand the original note to view your response.

**Modifying Notes**
You can only edit notes that you create. Administrators can edit all notes.

➢ To edit notes:
1. From the Browser View pane, select the object to which the note is attached.
2. On the object details page, click Notes.
3. Locate the note using filters, if necessary.
4. Click Edit beside the note.
5. Modify the note and click Save.

**Deleting Notes**
Only the note author or an Administrator can delete notes.

➢ To delete notes:
1. On the Browser View, select the object for which the note exists.
2. Select Notes on the details page of the object.
3 Locate the note and click **Delete**.

4 Click **Yes** to delete the note.

## Searching for Notes

Use the search to find forums, notes and discussion threads that contain specific information. Perform searches using this criteria:

1. **To search:**
   - **Select** Forum, then **Search**.

2. **Select the criteria:**
   - From **Forum**, select the forum that contains the notes and discussion threads to view.
   - From **Author**, select the name of the employee who created the note or discussion threads.
   - To view notes and discussion threads created during a certain period of time, click the **Calendar** button, and use the date selectors.
   - Select **Containing Any Of** to find notes that contain some, but not all, of text that you enter.
   - Select **Containing All Of** to find notes that contain all text that you enter.

3. **Click Search.**
   
The notes, forums, and discussion threads that contain the criteria are displayed.

## About Annotations

Annotations enable you to use notes to discuss measures, accountability elements, or strategy elements within the context of a reporting period such as a financial quarter or corporate event. As such, you must associate annotations with a reporting period. See “Creating Reporting Periods and Categories” on page 113. To create, modify, or delete annotations, you must the annotation creator. See “Assigning Responsibilities” on page 51.

**Tip:** To view multiple annotations and their associated initiatives, use the Annotations and Initiatives on the object details page. See “Annotations and Initiatives Tab” on page 130.

See:
- “Creating Annotations” on page 129
- “Modifying Annotations” on page 129
- “Deleting Annotations” on page 129
Requirements

Before creating annotations, ensure that you are assigned to the measure, accountability element, or strategy element as an annotation creator. See “Assigning Responsibilities” on page 51. You must also ensure that the reporting period in which to place the annotation, exists. See “Creating Reporting Periods and Categories” on page 113.

Creating Annotations

To create annotations:

1. Ensure that you satisfy the requirements. See “Requirements” on page 129.
2. From the Browser View, select the object.
3. Click Notes.
   The associated notes and annotations are listed.
4. Click Post New Notes.
5. Select Annotation and a Reporting Period.
   In Subject, enter the name of the note. A subject is required.
6. From Category, select a category that best represents the annotation, such as Targets, FYI, Miscellaneous. An administrator can change these categories.
7. In Contents, enter the message.
8. Optional: To attach a file to the annotation, click Browse, locate the file, and click Upload.
9. Click Save.

Modifying Annotations

To edit annotations:

1. From the Browser Viewer, select the object.
2. Click Notes.
   The associated notes and annotations are listed.
3. Locate the annotation to modify and click the adjacent Edit button.
4. Modify the annotation.
5. Click Save.

Deleting Annotations

You can only delete annotations that you created.
To delete annotations:

1. From the Browser Viewer, select the object for which the annotation exists.
2. On the object details page, click **Notes**.
3. Locate the annotation and click the adjacent **Delete** button.
4. Confirm that you want to delete the annotation.

**Annotations and Initiatives Tab**

The Annotations and Initiatives tab displays both annotations and initiatives for an object. An administrator must grant you access to this tab by removing the corresponding web page restriction. If you are an annotation creator, you can create, edit, or delete annotations from the tab.
Using Alerts

This chapter describes the alerts you can create for measures, scorecards, and initiatives, and explains how to subscribe, unsubscribe and respond to alerts.

The Administrator can monitor the activity of alerts through the Alerter Process Report. See the Hyperion Performance Scorecard — System 9 Administrator’s Guide.

Alerts

Alerts enable you to monitor corporate, business unit, and employee performance by notifying subscribers by E-mail when the performance of key measures, scorecards, or other points of vital information, depart from an acceptable range. For example, if results for a measure called “Retention of Customers” must not fall below 75%, create a Measure Result in Range alert to notify subscribers if the measure’s result data is less than 75%. Alerts can also be created that prompt subscribers when tasks such as measure result collection or initiative completion are approaching, due, or overdue.

Subscribers receive notification when alerts are triggered. They can acknowledge the alert notification, unsubscribe from the alert, or investigate the business object in alert.

Administrators can use the Alerter’s Process Report to monitor alert and alert notification activity. See the Hyperion Performance Scorecard — System Administrator’s Guide.

To use alerts, meet these conditions:

- Ensure your Administrator has configured and deployed the Alerter as described in the Hyperion Performance Scorecard — System 9 Installation Guide.
- Ensure the subscribers have the user role assigned to their accounts in order to investigate alerts.
Note: Depending on the security role assigned to your user account, you may only be able to perform certain alert-related tasks. For example, only administrators (users with the admin security roles assigned to their user accounts) can flag alerts they create as public and subscribe others to alerts.

See:
- Audience, which may be personal or public. See “Alert Audience” on page 132.
- Business Object to which the alert is to be attached. See “Data for Alerts” on page 132.

Alert Audience

Alerts may be intended for a personal or public audience:
- Personal alerts are created by a user to alert that individual about the status of a measure for which they are responsible. Personal alerts apply to only that user, and cannot be accessed by anyone else.
- Public alerts function can be created by administrators only. Public alerts work in the same way as personal alerts, but can be subscribed to by other users, or used as a template to generate new alerts that have common attributes. Only administrators can create, modify or delete public alerts.

You can inherit attributes from both public and personal alerts. When you inherit attributes from a public alert, the public alert is effectively being used as a template. When you make changes to a public alert that was used as a template, those changes are reflected in all alerts created based on the public alert.

Data for Alerts

Alerts can only be created for the business objects included on the following table.

<table>
<thead>
<tr>
<th>Business Object</th>
<th>Create Alerts For</th>
</tr>
</thead>
</table>
| Measures        | - Specific measures you select during alert creation  
                 | - Measures that are owned by you or other users  
                 | - Measures for which you, or other users, are the Result Collector  
                 | - Measures for which you, or other users, are the Target Setter  
                 | - Measures on scorecards that are owned by you or other users  
                 | - Measures on scorecards of which you, or other users, are a member  
                 | - Measures on scorecards for employees that are managed by you or other users |
| Initiatives     | - Specific initiatives that you select during alert creation  
                 | - Initiatives that are owned by you or other users  
                 | - Initiative assigned to measures to which you, or other users, have access  
<pre><code>             | - Initiatives assigned to strategy and accountability element to which you, or other subscribers, have access |
</code></pre>
<table>
<thead>
<tr>
<th>Business Object</th>
<th>Create Alerts For</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scorecards</td>
<td>■ Specific scorecards you select during alert creation</td>
</tr>
<tr>
<td></td>
<td>■ Scorecards that are owned by you or other users</td>
</tr>
<tr>
<td></td>
<td>■ Scorecards to which you, or other users, are members</td>
</tr>
<tr>
<td></td>
<td>■ Scorecards for employees that are managed by you or other users</td>
</tr>
</tbody>
</table>

**Creating Alerts**

Depending on the type of business object that has been selected for the alert, you can create and subscribe to a variety of alerts. To view the alert type available for the selected business object, refer to these sections:

- “Creating Measure Alerts” on page 133
- “Creating Scorecard Alerts” on page 139
- “Creating Initiative Alerts” on page 142
- “Creating Alerts Based on Other Alerts” on page 146

**Creating Measure Alerts**

You can create an alert to advise yourself or other users of the current status of a measure, or if the measure result is outside a specified range.

➢ To create a measure alert:

1. **Log on to Performance Scorecard.**
2 In the View pane, select **Browser View**

3 Expand **Alerts > Measure Alerts**.

A list of the available types of Measure Alerts is displayed. Refer to Table 3, “Measure Alert Types,” on page 134 for a brief description of each type of measure alert.

<table>
<thead>
<tr>
<th>Alert</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure in status</td>
<td>Notifies subscribers when a measure’s status corresponds to a certain general status represented by a default or user-defined status symbol. For example, you may want to create an alert that contacts all employees associated with a measure when its status is poor (indicated by default, by a red symbol).</td>
</tr>
<tr>
<td>Alert</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Result in range</td>
<td>Notifies subscribers when a measure’s result falls within a range you specify. For example, you may want to contact key employees in your application if a measure quantifying Customer Satisfaction falls below a certain level by creating an alert of this type.</td>
</tr>
<tr>
<td>Score in range</td>
<td>Notifies subscribers when a measure’s score enters a monitored range. For example, you may want to contact certain employees if the score for a measure called Number Customer Support Calls exceeds a score range of over 60%.</td>
</tr>
<tr>
<td>Result collection due</td>
<td>Notifies subscribers when results for certain measures are approaching, at, or past their collection dates. Create this kind of alert to make sure that measure results are collected in a timely manner.</td>
</tr>
<tr>
<td>Variance in range</td>
<td>Notifies subscribers when the percentage by which a measure’s result differs its target departs from a range you define as acceptable.</td>
</tr>
<tr>
<td>Result collection due</td>
<td>Notifies subscribers when results for certain measures are approaching, at, or past their collection dates. Create this kind of alert to make sure that measure results are collected in a timely manner.</td>
</tr>
</tbody>
</table>

4 Click the type of measure alert that you want to create, such as Measure in Status or Score in Range.

The Alert List for the selected alert type is displayed.

5 From View, select Personal to display all measure alerts that you have created.

6 Click Add.

The Type tab of the Alert Setup page is displayed.

7 Optional: Under Alert Inheritance, use the attributes of a previously created alert as the basis for the new alert, as outlined in these steps:
   a. Select Inherit Attribute Values From. The list of existing alerts is enabled.
   b. Select the alert from which the new alert is to inherit its attributes. The Measure Selection area is disabled.
   c. Continue with step 11.

8 Under Measure Selection, click Specifically Selected to enable you to choose from all measures you are authorized to access.

9 Under Where Subscriber Is, select one of these options to assign the alert to the subscriber:
   - Result Collector to assign the alert to measures for which the subscriber can collect results.
   - Target Setter to attach the alert to measures for which the subscriber can specify targets.
   - Owner to assign the alert to measures that the subscriber owns.

10 Under Where Measure is on Scorecards, select one of these options to attach the alert to measures on the selected scorecards:
   - Select Specifically Selected to assign the alert to measures on a scorecard. You can choose the scorecard(s) later.
   - Select Owned to attach the alert to measures on scorecards that the subscriber owns.
   - Select Member-of to attach the alert to measures on scorecards of which the subscriber is a member.
Select Managed Employee to assign the alert to measures on the scorecards of Employees which the subscriber manages.

11 Click Next.

The General tab of the Alert Setup page is displayed. If you assigned the alert to specific measures or scorecards, this page also has Measure Selection or Scorecard Selection tabs.

Note: The setup options will vary, depending on the type of measure alert you are creating.

The Alert Setup (General) page provides this information:
- Type of measure alert you are creating, such as Measure In Status or Result Collection Due
- Alert upon which yours is based (if applicable)
- Measures you selected to which you assigned the alert. For example, if you have attached the alert to measures on a specific scorecard, then Specifically Selected Scorecards is shown

12 In Name, enter the name of the new alert.

13 In Description, enter a brief description of the purpose of the alert.

14 For a Measure In Status alert, click the default or user-defined status symbol that prompts an alert notification to be sent to all subscribers when that status is achieved. For example, if you want all subscribers to the alert to be notified when a measure’s status is poor, click the red status symbol.

15 For a Result in Range, Score in Range, Variance in Range, or Result Collection Due alert, define the range by performing these steps:
      The Subrange Setup is displayed.
   b. In Subrange Setup, define the range that activates the alert by entering numeric values in the text boxes and selecting comparison symbols from the drop-down lists. Enter the lowest value that will trigger the alert in the left text box. The value in the right text box represents the highest value.

   Tip: Click f to open the Formula Editor to build complex formulas for each range boundary. For information about the Formula Editor, see the Hyperion Performance Scorecard — System 9 Application Designer’s Guide.

This table provides examples of the types of ranges you can specify based on the measure alert you are creating.
### Table 4  Defining Alert Activation Ranges

<table>
<thead>
<tr>
<th>Alert Type</th>
<th>Range Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Result in range</td>
<td>Define a range of results that trigger an alert notification.</td>
</tr>
<tr>
<td></td>
<td>For example, to send alert notification if the measure’s result value is</td>
</tr>
<tr>
<td></td>
<td>greater than 60 but less than 80:</td>
</tr>
<tr>
<td></td>
<td>- Enter 60 in the first text box as the low end of the range.</td>
</tr>
<tr>
<td></td>
<td>- Select &lt; (less than) from both lists.</td>
</tr>
<tr>
<td></td>
<td>- Enter 80 in the second text box as the high end of the range.</td>
</tr>
<tr>
<td>Score in range</td>
<td>Define a range of scores that trigger an alert notification.</td>
</tr>
<tr>
<td></td>
<td>For example, to send alert notification if the measure’s score is greater</td>
</tr>
<tr>
<td></td>
<td>than 50 but less than 75:</td>
</tr>
<tr>
<td></td>
<td>- Enter 50 in the first text box as the low score in the range</td>
</tr>
<tr>
<td></td>
<td>- Select &lt; (less than) from both lists</td>
</tr>
<tr>
<td></td>
<td>- Enter 75 in the second text box as the high score in the range.</td>
</tr>
<tr>
<td>Variance in range</td>
<td>Define the range of variance value that you want to monitor using the alert.</td>
</tr>
<tr>
<td></td>
<td>For example, to send alert notification if the variance is less than 50,</td>
</tr>
<tr>
<td></td>
<td>- Enter 0 in the first value</td>
</tr>
<tr>
<td></td>
<td>- Select &lt; (less than) from both lists</td>
</tr>
<tr>
<td></td>
<td>- Enter 50 in the second value</td>
</tr>
<tr>
<td>Result collection</td>
<td>Define the number of days before and after the result collection date that</td>
</tr>
<tr>
<td>due</td>
<td>alert notifications are to be sent.</td>
</tr>
<tr>
<td></td>
<td>For example, to send alert notification of the upcoming collection date a</td>
</tr>
<tr>
<td></td>
<td>week before and three days after the collection date:</td>
</tr>
<tr>
<td></td>
<td>- Enter -7 in the first text box as the first notification day</td>
</tr>
<tr>
<td></td>
<td>- Select &lt; from both lists</td>
</tr>
<tr>
<td></td>
<td>- Enter 3 in the second text box as the second notification day.</td>
</tr>
</tbody>
</table>

16 **Optional:** For Administrators only, click *This is a Public Alert* to
create a public alert that is applied to all users.

17 Depending on the alert type and whether multiple targets have been defined in the application, use *Target Used in Formulas* to select one of multiple targets to determine the measure’s status, score, result, or variance.

18 If you selected *Specifically Selected* measures, select *Measure Selection*, and perform these tasks:

   a. Beside the list of Measures, click *Select* to display the Select Measure dialog box.
   
   b. Select all the measure(s) to which you want to assign the alert.

      You can filter the measures as follows:

      - Enter the first letters of the measure’s name and then an asterisk (*) to find all
        measures whose name starts with the letter you specify. For example, *b* lists all
        measures with names beginning with b.

      - Click *Search* to list all available measures.

   c. Repeat step b for each measure that you want to add.
d. Click **Apply** when you have selected the measures.

**19** Select the **Message Setup** tab.

Depending on the alert type, the information shown on this page may vary. For example, an Exited Range checkbox may be displayed instead of the Stopped Meeting Criteria checkbox.

**20** Under **Alert Activated Message**, click **Realerting Settings** to send a subsequent alert if the conditions selected in step 22 apply.

**21** Click **Send If Value** to set the conditions that must be met to send subsequent notifications to the associated subscribers, including notification that the measure is no longer in alert.

Select the factors that cause subsequent notifications to be sent.

<table>
<thead>
<tr>
<th>Alert Type</th>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure in Status</td>
<td>Started to meet criteria</td>
<td>Sends an alert notification to advise that the measure is now in range for the selected status symbol.</td>
</tr>
<tr>
<td>Measure Result in range</td>
<td>Entered Range</td>
<td>Sends an alert notification to advise that the measure's alert activation criteria, such as result, variance, or score, now corresponds to the defined range.</td>
</tr>
<tr>
<td>Measure Score in range</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Measure Variance in range</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Result collection due</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Measure in Status</td>
<td>Meets criteria and changed</td>
<td>Sends an alert notification to advise the measure’s status corresponds to the selected status symbol, but the measure has different score or result data that determines which status symbol is displayed.</td>
</tr>
<tr>
<td>Measure Result in range</td>
<td>Inside range and changed</td>
<td>Sends an alert notification to advise that the measure criteria, such as score or variance, correspond to the defined range but has a different score, result, or variance. For example, a measure’s score could increase or decrease, but still fall within the unacceptable range that you have defined.</td>
</tr>
<tr>
<td>Measure Score in range</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Measure Variance in range</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Result collection due</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Measure in Status</td>
<td>Meets criteria</td>
<td>Sends an alert notification each time the measure’s status corresponds to the selected status symbol.</td>
</tr>
<tr>
<td>Measure Result in range</td>
<td>Inside range</td>
<td>Sends an alert notification each time the measure’s result, score, or variance is inside the specified range.</td>
</tr>
<tr>
<td>Measure Score in range</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Measure Variance in range</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Result Collection Due</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subscriber Has Not Acknowledged</td>
<td></td>
<td>Sends alert notifications for the same condition, if the subscriber has not acknowledged receipt of the original notification.</td>
</tr>
<tr>
<td>This Message NOT Been Sent in Last x Hours</td>
<td>Sends alert notifications if no notifications have been sent in the past x hours. Hyperion recommends a default of 24 hours.</td>
<td></td>
</tr>
</tbody>
</table>

**22** In **Subject and Body** enter the text for the subject and body text of the alert notification that is sent when the measure’s status meets the above criteria. Only the subject is required.
Click the function button to insert a variety of dynamic text in the subject line and body of the notification as described in “Inserting Dynamic Variables in Alert Notifications” on page 147.

23 **Optional:** In **Alert Concluded Message**, set up a notification to subscribers when the measure is no longer in alert, as outlined below:

   a. Under **Send if Value**, select **Stopped Meeting Criteria**.
   b. In **Subject**, enter the text that forms the subject line of the concluding E-mail. A subject is required.
   c. In **Body**, enter the content of the concluding E-mail.

   Click the function button to insert a variety of dynamic text options in the subject line and body of the Alert Concluded Message, as described in “Inserting Dynamic Variables in Alert Notifications” on page 147.

24 **Click Save.**

   The new alert is added to the Alert List under the selected alert type. For example, if you created a measure result in range alert, the new alert is added to the Measure Result in Range Alert List and is available if expand the Measure Alerts tree and select Result in Range.

   You can subscribe to the alert as described in “Subscribing to Alerts” on page 151.

---

**Creating Scorecard Alerts**

This section describes how to create these types of scorecard alerts:

- **Scorecard in Status alert** is used to contact subscribers when the performance of a key scorecard does not correspond to an acceptable status as indicated by a user-defined or default status symbol.

- **Scorecard Score in Range alert** is used to notify subscribers if the score for a scorecard falls outside an acceptable range.

To create scorecard alerts:

1. **Log on to Performance Scorecard.**
2. **In the Viewer, select** **Browser View**.
3. **Expand Alerts.**

   The list of Scorecard Alerts is displayed.

   The types of alerts that you can create are grouped by business object, such as scorecard and measure, in the Browser View pane. Click to expand each section to view the types of alerts you can define.

   Clicking an alert type, such as Score in Range, displays all the alerts of the selected type.

4. **Click on the type of scorecard alert to be created.**

   The Alerts List displays all alerts for the selected type.

5. **Click Add.**
The Alert Setup page is displayed.

6 **Optional:** Under **Alert Inheritance**, use the attributes of a previously created alert for the new alert, as outlined in these steps:

   a. Select **Inherit Attribute Values From**.
      The list of alerts is enabled.
   b. Select the alert from which the new alert is to inherit its attributes.
      The **Scorecard Selection** area is disabled.
   c. Continue with step 9.

7 Under **Scorecard Selection**, under **This Alert Evaluates Scorecards**, click **Specifically Selected** to assign specific scorecards to the alert.

8 Under the **Where Subscriber Is** list, select one of these options to assign the alert to the subscriber:

   - **Owned** to assign the alert to scorecards that are owned by the subscribers.
   - **Member-Of** to attach the alert to scorecards of which subscribers are a member.
   - **Manager of Employee** to assign the alert to scorecards that belong to employees who are managed by the subscribers.

9 **Click Next.**

The General tab of the Alert Setup page is displayed. If the alert has been assigned to specific measures on certain scorecards, this page also displays a Scorecard Selection tab. Based on the type of scorecard alert you are creating, the alert activation criteria displayed may vary from that shown on the following figure.

This page provides this information:

   - Type of alert you are creating, such as Scorecard Enters Status
   - Inherited attributes, if applicable
   - Method you are using to the scorecards for this alert

10 **In Name,** enter the name of the new alert.

11 **In Description,** enter a brief description of the purpose of the alert.

12 For a **Scorecard in Status** alert, click a default or a user-defined status symbol that prompts alert notifications to be sent, if that status is achieved by the scorecard. For example, to notify subscribers when a scorecard’s performance corresponds to the good performance, select the green status symbol.

13 For a **Score in Range** alert, perform these steps:

   a. Under **Alert Activation Criteria**, click **Add** to display the Subrange Setup dialog box.
   b. Use the **Subrange Setup** dialog box to define the range that activates the alert by entering numeric values in the text boxes and selecting comparison symbols from the drop-down lists. Enter the lowest value that will trigger the alert in the left text box. The value in the right text box represents the highest value.
Tip: Click f to open the Formula Editor to build complex formulas for each range boundary. See the Hyperion Performance Scorecard — System 9 Application Designer’s Guide.

c. Click OK.

14 If multiple targets have been set up for the application, from Target Used in Formulas, select the target that you want to use in the calculation that determines the scorecard’s performance status.

15 If you selected Specifically Selected Scorecards, select the Scorecard Selection tab to select the Accountability Element, Strategy Element or Employee Scorecards to which the alert is to be assigned:

- Beside the Accountability Element Scorecard, click Select to display the Select Accountability Element dialog box. Expand the tree to display the accountability element to which the alert is to be applied, then click Apply.

- Beside Strategy Element Scorecard, click Select to display the Select Strategy Element dialog box. Expand the tree to display the strategy element to which the alert is to be applied, then click Apply.

- Beside Employee Scorecard, click Select to display the Select Employee dialog box. Search for the employee to which the scorecard alert is to be applied, then click Apply.

16 Click Next to display the Message Setup tab.

17 If you want to send multiple alert notifications to subscribers under certain conditions, select Define Realerting Settings and use the following table to define the factors that cause notifications to be re-issued.

Note: The conditions you can select depend on the kind of scorecard alert you are creating.

<table>
<thead>
<tr>
<th>Alert Type</th>
<th>Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scorecard in Status</td>
<td>Started to meet criteria. Sends alert notification when the scorecard’s overall performance corresponds, for the first time, to the status symbol you selected.</td>
</tr>
<tr>
<td>Scorecard in Range</td>
<td>Entered range. Sends alert notification when the scorecard’s score enters the range you defined.</td>
</tr>
<tr>
<td>Scorecard in Status</td>
<td>Meets criteria and changed. Sends alert notification when the scorecard’s performance corresponds to the status symbol you selected, but has a different scorecard score.</td>
</tr>
<tr>
<td>Scorecard in Range</td>
<td>Inside range and changed. Sends alert notification when the scorecard’s score is still within the range you specified, but now has a different score value. For example, a scorecard’s score could increase or decrease but still fall within the range you specified.</td>
</tr>
<tr>
<td>Scorecard in status</td>
<td>Meets criteria. Sends alert notification when the scorecard’s performance corresponds to the selected status symbol.</td>
</tr>
<tr>
<td>Scorecard in range</td>
<td>Inside range. Sends alert notification when the scorecard’s score falls within the defined range.</td>
</tr>
<tr>
<td>Subscriber Has Not</td>
<td>Sends alert notifications for the same condition if the subscriber has not acknowledged receipt of the original notification.</td>
</tr>
</tbody>
</table>

Creating Alerts 141
<table>
<thead>
<tr>
<th>Alert Type</th>
<th>Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>This Message NOT Been Sent in Last x Hours</td>
<td>Sends alert notifications if no notifications have been sent in the past x hours. Hyperion recommends a default of 24 hours.</td>
</tr>
</tbody>
</table>

**18** In **Subject** and **Body**, enter the subject and body text of the alert notification. A subject is required.

Click the function button to insert a variety of dynamic text options in the subject line and body of the notification as described in “Inserting Dynamic Variables in Alert Notifications” on page 147.

**19** Optional: To notify subscribers when the measure is no longer in alert, select **Stopped Meeting Criteria** and perform these steps:

- In **Subject**, enter the subject line of the concluding notification. A subject is required.
- In **Body**, enter the content of the concluding notification.
  
  Click the function button to insert a variety of dynamic text options in the subject line and body of the notification as described in “Inserting Dynamic Variables in Alert Notifications” on page 147.

**20** Click **Save**.

The alert is added to the list of alerts of this type.

You can subscribe to the alert as described in “Subscribing to Alerts” on page 151.

### Creating Initiative Alerts

This section explains how to create initiative alerts.

 dévelop

To create an initiative alert:

1. **Log on to Performance Scorecard.**
2. In the **Viewer**, select **Browser View**.
3. Expand **Alerts**.

The list of Initiative Alerts is displayed.

The types of alerts that you can create are grouped by business object, such as initiative, scorecard and measure. Click to expand each section to view the types of alerts you can define.

Clicking each alert type, such as Initiative In Status, displays the Alert List that identifies all the alerts of this type that have been defined.

4. **Select the type of initiative alert to be created.**

The Alerts List displays all alerts for the selected type.

This table describes each kind of initiative alert type you can build.
Table 7  Initiative Alert Types

<table>
<thead>
<tr>
<th>Alert</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent Complete In Range</td>
<td>Contacts subscribers if an initiative’s completion percentage falls within or outside a range you specify.</td>
</tr>
<tr>
<td>Past Due Date</td>
<td>Notifies subscribers when an initiative has not been completed by the assigned due date and action is required to complete it.</td>
</tr>
<tr>
<td>Initiative in Status (Symbol)</td>
<td>Contacts subscribers when progress on an initiative changes status as indicated by a default or user-defined status symbol.</td>
</tr>
<tr>
<td>Initiative in Status (Text)</td>
<td>Notifies subscribers when progress on an initiative changes status as indicated by a defined state, such as Started or In Progress.</td>
</tr>
<tr>
<td>Initiative Assigned Owner</td>
<td>Notifies subscribers when a specific employee is assigned ownership of an initiative. This kind of alert is useful if you are a manager and need to know when one of your direct reports is given ownership of an initiative</td>
</tr>
<tr>
<td>Initiative Assigned To Notify</td>
<td>Contacts subscribers when a specific employee is associated with an initiative.</td>
</tr>
</tbody>
</table>

5 Click **Add**.

The Alert Setup page is displayed.

6 **Optional:** Under **Alert Inheritance**, select **Inherit Attribute Values From** to use the attributes of a previously created alert for the new alert, as follows:

a. From the list of existing alerts, select the alert from which the new alert is to inherit its attributes. The **Initiative Selection** area is disabled.

b. Continue with step 8.

7 **Select the initiatives to which you want to assign the alert:**

- Select **Specifically Selected Initiatives** to assign the alert to a specific initiative. You identify the initiative to which you want to apply the alert later on.

- Select **Initiatives On Selected Objects** to attach the alert to initiatives assigned to certain measures, Strategy elements, or Accountability teams. You select the business objects, such as measures and, Strategy elements, to which you want to assign the alert later.

- Select **Owned By Subscriber** to assign the alert to all initiatives owned by the subscriber, who is the Employee who receives the alert notification. If you select this option, the alert is assigned to all the initiatives owned by the employee subscribed to this alert.

8 Click **Next**.

The General tab of the Alert Setup page is displayed. The attributes you can specify for the alert, such as activation criteria, vary depending on the kind of initiative alert you are creating.

If you assigned the alert to specific initiatives, an Initiative Selection tab is also displayed.

This information is shown:

- Alert type you are creating, such as Initiative Percentage Done

- Alert upon which your new alert is based (if applicable)
- Method you are using to select the initiatives to assign to the alerts

9 In Name, enter the name for the new alert.

10 In Description, summarize the purpose of the alert.

11 If you are creating a Percent Complete In Range or a Past Due Date alert, perform these steps:
      The Subrange Setup dialog box is displayed.
   b. Define the range, in which $x$ represents either the completion percent or due date of the initiative, by defining one of the following:
      - The range of values that will place the initiative(s) in an alert state. For example, you may want notifications sent if an initiative is between 40% - 60% complete.
      - The range of days surrounding the initiative’s completion date that you want to monitor. For example, to send alert notification five days before the initiative is meant to be completed, and two days after the initiative is past due, you would enter -5 in the first text box, select < from both the drop down lists, and enter 2 in the second text box.
   
      **Tip:** Click $f$ to use the Formula Editor to define a formula for each range boundary. See the Hyperion Performance Scorecard — System 9 Application Designer’s Guide.
   
   c. Click OK.

12 Depending on the type of initiative alert that you are creating, select the criteria for that initiative:
   
   - For a Percent Complete in Range alert, click the default or user-defined status symbol that places the initiative in an alert state.
   - For an Initiative Enters Status (Symbolic) alert, click the default or user-defined status symbol that places the initiative in an alert state.
   - For an Initiative in Status (Textual) alert, select the status that prompts alert notifications be sent using the list. For example, to send notification to subscribers when the alert is finished, select Complete.
   - For an Initiative Assigned to Notify or Initiative Assigned to Owner alert, from the Employee to Watch list, select the employee who should receive alert notification, if they become the owner of, or associated with, an initiative. For example if you are the manager of three employees and need to know when one of them is assigned ownership of an initiative, select that employee from the list.

13 If you selected Specifically Selected Initiatives, select the Initiative Selection tab and perform these steps:
   
   a. Click Select to display the Select Initiative dialog box.
   
   b. Select the initiative(s) to which you want to assign the alert.
   
   c. Repeat step b to select all the initiatives to assign to the alert.
d. Click **Apply** when you have selected all the initiatives.

14 If you selected **Initiatives On Selected Objects** to attach the alert only to initiatives associated with measures, strategy elements, or accountability elements, click **Select** adjacent to the type of business object with which the initiative is associated.

- To assign the new alert to a measure, select the measure from the Select Measure dialog box, then click **Apply**.
- To assign the new alert to a strategy element or an accountability team, expand the tree on the Select Accountability or Strategy Element dialog box, select the business object, and click **Apply**.

15 Click **Next** to display the Message Setup page.

16 If you are creating one of the following alerts, select **Realerting Settings** to send multiple alert notifications to subscribers under certain conditions:

- Percent Complete in Range
- Past Due Date
- Initiative in Status (Symbolic and Textual)

This option includes notifications that contacts subscribers when the measure is no longer in alert.

**Note:** If you are creating an Initiative Assigned Owner or Initiative Assigned to Notify alert, you cannot define a re-alerting strategy.

The following table identifies the factors that cause notifications to be re-issued.

**Table 8  Initiative Alert Notification Re-Issuing Options**

<table>
<thead>
<tr>
<th>Alert Type</th>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiative Enters Status</td>
<td>Started to meet criteria. Sends an alert notification to advise that the initiative’s status now corresponds to the selected textual or status symbol.</td>
<td></td>
</tr>
<tr>
<td>(Textual and Symbolic)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiative Past Due</td>
<td>Entered range. Sends alert notification to advise that the initiative’s completion percentage, or due date is now within the defined range.</td>
<td></td>
</tr>
<tr>
<td>Initiative Percent Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiative Enters Status</td>
<td>Meets criteria. Sends an alert to advise that the initiative’s status corresponds to the selected status text or symbol.</td>
<td></td>
</tr>
<tr>
<td>(Textual and Symbolic)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiative Past Due</td>
<td>Inside range and changed</td>
<td>Sends alert notification to advise:</td>
</tr>
<tr>
<td>Initiative Percent Complete</td>
<td></td>
<td>- The initiative’s current completion percentage is still within the range but has increased or decreased.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- The date on which the initiative is to be completed is within the range you defined but is closer to the due date.</td>
</tr>
<tr>
<td>Alert Type</td>
<td>Condition</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-----------</td>
<td>-------------</td>
</tr>
<tr>
<td>Initiative Enters Status (textual and symbolic)</td>
<td>Meets criteria</td>
<td>Sends an alert notification to advise that the initiative’s current status corresponds to the selected status text or symbol.</td>
</tr>
</tbody>
</table>
| Initiative Past Due | Inside range | Sends alert notification to advise:  
|m | The date on which the initiative is to be completed is still within range you defined.  
|m | The initiative’s current percent complete is still within the range you specified. |
| Initiative Percent Complete | Inside range | Sends alert notification to advise:  
|m | The date on which the initiative is to be completed is still within range you defined.  
|m | The initiative’s current percent complete is still within the range you specified. |
| Subscriber Has Not Acknowledged | | Sends alert notification only if the subscriber has not acknowledged receipt of the alert notification. |
| This Message NOT Been Sent in Last x Hours | | Sends alert notification only if notification has not been sent in the past x hours. Specify how many hours should elapse between notifications in the text box provided. Hyperion recommends the default time period. |

17 In **Subject** and **Body**, enter the subject and body of the alert notification. A subject is required.

Click the function button to insert a variety of dynamic text options in the subject line and body of the notification as described in “Inserting Dynamic Variables in Alert Notifications” on page 147.

18 **Optional:** To notify subscribers when the initiative is no longer in alert, select **Exited Range** or **Stopped Meeting Criteria** and perform these steps:

- In **Subject**, enter the text for the subject line of the concluding notification.
- In **Body**, enter the content of the notification.

19 Click **Save**.

The alert is added to the list of alerts of this type.

You can subscribe to the alert as described in “Subscribing to Alerts” on page 151.

### Creating Alerts Based on Other Alerts

You can create an alert based on an existing alert using these options:

- Create the new alert based on a public alert.
  
  If you use this option, the new alert inherits all of the properties of the public alert you selected. Any changes made to the public alert are also applied to the alert you create.

- Create the new alert based on a personal alert that you previously created.

- Copy the alert upon which you want to base your alert and modify it as required.

To create alerts based on an existing alert:

1. Log on to Performance Scorecard.
2. In the Viewer, select **Browser View**.
3. Expand **Alerts**.
The list of available Alerts is displayed.

The alert types you can create are grouped by business object, such as scorecard and measure, in the Browser View pane. Click to expand each section to view the types of alerts you can define.

Clicking each alert type, such as Variance in Range or Result in Range, displays the Alert List that identifies all the alerts of this type that have been created.

4 **Click to expand the type of alert you want to create.**

5 **Click the type of measure to be created, such as Measure in Status or Score in Range.**

The Alert List for the selected alert type is displayed.

6 **To create the new alert based on the copy of a personal alert, perform these steps:**
   a. From Alert List, select the alert to be copied.
   b. Click Copy.
   c. Select the copied alert and click Edit.
      The Alert Setup page is displayed.
   d. Build the alert as described in “Creating Alerts” on page 133.

   **Note:** If you select this option, you can only specify attributes that were not given to the alert upon which yours is based.

7 **To create an alert directly based upon an existing personal alert, perform these steps:**
   a. Click Add.
      The Alert Setup page is displayed.
   b. In Alert Inheritance, select Inherit Attribute Values From.

   **Note:** If you select this option, you can only specify attributes that were not given to the alert upon which yours is based.
   c. Select the alert you want to use.
   d. Click Next.
   e. Define the alert as described “Creating Alerts” on page 133.

**Inserting Dynamic Variables in Alert Notifications**

When an alert is triggered and a notification sent, Performance Scorecard inserts the values represented by the variables in the body or subject line of the alert notification. All the variables described below are available, regardless of the type of alert you are creating. All dynamic variables that you insert must be enclosed between $ $, such as $$object_name$$. Dynamic variables should not be capitalized.

You can insert any variables in the body and subject line of the alert notification subscribers receive when an alert is triggered. However, if you insert an inappropriate variable, a warning is displayed in the alert notification E-mail, instead of the actual value the dynamic variable
references. For example if “$$\text{result}$$” is placed in an initiative alert message, “<not a measure>” is displayed.

The following table describes the variables you can use in the subject line and body of alert notifications subscribers receive when an object is in alert.

<table>
<thead>
<tr>
<th>Variable</th>
<th>Inserts</th>
<th>Applies to</th>
</tr>
</thead>
<tbody>
<tr>
<td>collection_date</td>
<td>The expected collection date specified for the measure for which you are creating an alert. This frequency of collection is specified during the measure’s setup.</td>
<td>Measure alerts</td>
</tr>
<tr>
<td>current_date</td>
<td>The current system date.</td>
<td>All</td>
</tr>
<tr>
<td>current_time</td>
<td>The current system time.</td>
<td>All</td>
</tr>
<tr>
<td>object_name</td>
<td>The name of the object (measure, initiative, or scorecard) to which the alert is assigned. For example, if you are defining an alert for a measure called Increase Customer Satisfaction, selecting this variable inserts Increase Customer Satisfaction in the alert notification message’s body or subject line.</td>
<td>All</td>
</tr>
<tr>
<td>object_type</td>
<td>The kind of business object for which you are defining an alert. For example if you are creating an alert for a scorecard, object_type is scorecard.</td>
<td>All</td>
</tr>
<tr>
<td>result</td>
<td>The current result value of the business object for which you are creating an alert, at the time the alert notification is sent. For example, if you are creating an alert for a measure, this variable places the measure’s result value in the alert notification.</td>
<td>Measure alerts</td>
</tr>
<tr>
<td>score</td>
<td>The current score of the business object for which you are defining an alert. For example, if you are creating an alert for a measure, this variable looks up the measure’s score at the time the alert notification is sent against the target you selected on the alert Setup page (if applicable).</td>
<td>Measure and scorecard alerts</td>
</tr>
<tr>
<td>status_symbol</td>
<td>The name of the status symbol</td>
<td>All</td>
</tr>
<tr>
<td>target</td>
<td>The target value you specified for the measure</td>
<td>Measure alerts</td>
</tr>
<tr>
<td>tripped_range_calculated</td>
<td>The numeric value produced when formulas specified in the alert’s sub range setup are evaluated. The numeric value in the tripped range is displayed regardless of whether it was derived from a formula or manually entered.</td>
<td>All</td>
</tr>
<tr>
<td>tripped_range_formula</td>
<td>The formula of the tripped range</td>
<td>All</td>
</tr>
<tr>
<td>user_name</td>
<td>The name of the employee who subscribes to the alert. Even though you have not yet subscribed to the alert you are creating, at the time the alert’s message is sent, the name of the Employees subscribed to the alert is looked up and inserted. If multiple employees later subscribe to the alert, each employee receives an alert notification message with their name inserted using this dynamic variable.</td>
<td>All</td>
</tr>
<tr>
<td>Variable</td>
<td>Inserts</td>
<td>Applies to</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>user_id</td>
<td>The user account name of the employee to which the alert notification is being sent.</td>
<td>All</td>
</tr>
<tr>
<td>variance</td>
<td>The numeric difference between the target established, and the result achieved by the measure for which you are creating an alert.</td>
<td>Measure alerts</td>
</tr>
<tr>
<td>initiative_due_date</td>
<td>The due date established for the initiative</td>
<td>Initiative alerts</td>
</tr>
<tr>
<td>initiative_notified</td>
<td>The name of the employee who is associated with the initiative and is notified of the initiative’s progress.</td>
<td>Initiative alerts</td>
</tr>
<tr>
<td>initiative_owners</td>
<td>The name of the employee(s) who owns the initiative</td>
<td>Initiative alerts</td>
</tr>
<tr>
<td>initiative_percent_complete</td>
<td>The initiative’s current completion state as a percentage</td>
<td>Initiative alerts</td>
</tr>
<tr>
<td>initiative_text_status</td>
<td>The current textual status (in progress, completed etc.) of the initiative</td>
<td>Initiative alerts</td>
</tr>
</tbody>
</table>

**Modifying Alerts**

You can only modify alerts that you have created and that are displayed in the Alert List when you select the My View tab. You do not need to re-subscribe to a modified alert because all changes made to an alert automatically apply to the subscription.

- To modify an alert:
  1. Log on to Performance Scorecard.
  2. In the Viewer, select **Browser View**.
  3. Expand **Alerts**.
     - The list of alert types is displayed.
  4. Click to expand the alert type, and select the alert you want to modify.
     - For example, to edit a measure variance alert, click Measure Alerts, and then Variance in Range.
  5. Click **Edit**.
     - The Alert Setup page for the selected alert type is displayed.
  6. Modify the attributes for the alert.
  7. Click **Save**.

**Copying Alerts**

Copying an alert is useful if you want to base a new alert on an existing alert.
To copy an alert:

1. Log on to Performance Scorecard.

2. In the Viewer, select Browser View.

3. Expand Alerts.
   The available alert types are displayed.

4. Click to expand the desired alert type.
   The selected Alerts List is displayed.

5. Click the alert to be copied.

6. Click Copy.
   A copy of the alert is added to the list as: Copy of <alert name>.

7. Select the copied alert and click Edit.

8. Modify the copied alert, if required, and change the name.

9. Click Save.

### Deleting Alerts

You can only delete alerts that you have created. Deleting an alert also deletes all subscriptions to the alert.

To delete an alert:

1. Log on to Performance Scorecard.

2. In the Viewer, select Browser View.

3. Expand Alerts.
   The list of alert types is displayed.

4. From the list of available alert types, click to expand the section for the type of alert to be deleted.
   For example, to delete a measure alert, click the Measure Alerts section. The list for the selected alert type is displayed.

5. Select the alert you want to remove and click Delete.
   A confirmation message is displayed.

6. Click Yes.
   The alert is removed from the Alert List and deleted from the application.
## Subscriptions

A subscription is the link between an alert and an employee to whom you wish the alert to be delivered. Users who subscribe, or who are subscribed by others to an alert, receive alert notifications when specific business objects are in an alert state and require attention.

Creating an alert and a subscription can be performed separately, although you can both create and subscribe to an alert in one step.

All users can subscribe themselves to a public alert. However, only users with the admin security role can create public alerts to which they subscribe other users.

Users can unsubscribe from any alert, including those to which an administrator has subscribed them. If the administrator does not want users to unsubscribe from a particular alert, it can be locked.

## Subscribing to Alerts

Subscribing to an alert is usually the next step in alert creation. Subscription is a one-click process unless you have not specified these attributes when you created the alert to which you want to subscribe:

- The business object (scorecard, initiative, and so on) to which you assigned the alert
- The alert activation criteria which define the unacceptable range or status that will trigger the alert
- The target against which alerting criteria are assessed
- Re-alerting strategy you want to use if you want multiple alert notifications to be sent to subscribers
- Subject of the alert notification

If you do not specify these attributes and try to subscribe to the alert, you are taken to the alert’s setup pages and prompted to enter the missing alert properties.

To subscribe to an alert:

1. **Log on to Performance Scorecard.**
2. **In the Viewer, select Browser View.**
3. **Expand Alerts.**
   - The list of alert types is displayed.
4. **Under the alert type, select the type of alert to which you want to subscribe, such as Scorecard in Status under Scorecard Alerts.**
   - The Alert List for the selected alert type is displayed.
5. **Select the alert to which you want to subscribe.**
6. **Click Subscribe To.**
If you do not select a subscription and click Subscribe To, you are taken to the Alert Setup page where you can create an alert and then subscribe to it.

**Note:** If you did not specify all of the alert properties required by subscription, the alert’s Setup page is displayed on which you must define all remaining required alert properties before attempting to re-subscribe.

The alert to which you subscribed is displayed in the Subscription List. When the conditions specified for the alert occur, and the business object is in an alert state, an alert notification E-mail is sent to notify you.

**One-Step Subscription**

If you do not want to create an alert and then subscribe to it, you can click Subscribe To on an Alert List to build an alert to which you are automatically subscribed. This is called one-step subscription.

**Note:** To use one-step subscription, you must specify all required alert attributes.

➢ To create an alert to which you are automatically subscribed:

1. **Log on to Performance Scorecard.**
2. **In the Viewer, select Browser View.**
3. **Expand Alerts.**
   The list of alert types is displayed.
   From the list of alert types under each business object, select the type of alert to which you want to subscribe, such as Scorecard in Status under Scorecard Alerts. The alert types you can create are grouped by business object, such as initiatives and measure, in the Browser View pane.
   Click to expand the desired business object alert section. For example, if you want to create and subscribe to an initiative alert, click the Initiative Alerts section. This lists the six kinds of initiative alerts you can create.
   The Alert List dialog box for the selected alert type is displayed.
4. **Click the type of alert to be created.**
   The Alert List is displayed, identifying any existing alerts of this type. The list is empty if no alerts of the selected type have been created.
5. **Click Subscribe To.**
   The Alert Setup page is displayed.
6. **Create the alert, making sure to specify all required information.** See “Creating Alerts” on page 133.
7 Click **Save** to automatically subscribe to the alert you created. A subscription is added to your Subscription List.

**Deactivating Alerts**

This section describes how to remove yourself from alerts to which you are subscribed.

**Note:** You cannot remove other employees from alert subscriptions.

➢ To deactivate alerts:

1. Log on to Performance Scorecard.
2 Select **Browser View**.

3 Click **Subscriptions**.

   A list of subscriptions to which you are subscribed is displayed.

4 **Select the alert that you no longer want to receive.**

5 **Click Unsubscribe.**

   A confirmation message is displayed.

6 **Click Yes.**

   The alert is removed from your Subscriptions list and you no longer receive alert notification messages.
Working With Subscriptions

This section describes how to disable and enable subscriptions. You can disable a subscription to make it temporarily inactive to eliminate the sending of alert notifications. You can then enable a disabled subscription to reactivate it, resuming the sending of alert notifications. See:

- “Disabling Subscriptions” on page 155
- “Enabling Subscriptions” on page 155
- “Modifying Subscriptions” on page 156

Disabling Subscriptions

Disabling a subscription renders it dormant; it does not delete the subscription. Disabling a subscription also flags the alert notification to not send any more alert notifications. Disable a subscription if you do not want to receive notifications for a period of time, but do not want to unsubscribe from the alert. For example, you may want to disable your current alert subscriptions over your holidays, but must enable them when you return to work.

To disable subscriptions:

1. Log on to Performance Scorecard.
2. In the Viewer, select the Browser View tab.
3. Click Subscriptions.
   
   A list of subscriptions is displayed.
4. Under View, select Enabled.
   
   A list of all active subscriptions is displayed.
5. Select the subscription to be temporarily disabled, and click Disable.
   
   A confirmation message is displayed.
6. Click Yes.

   The alert is added to the Disabled list under View. No alert notifications related to this subscription will be received until the subscription is re-enabled.

Enabling Subscriptions

This section explains how to reactivate a disabled subscription by enabling it.

To enable subscriptions:

1. Log on to Performance Scorecard.
2. In the Viewer, select Browser View.
3. Click Subscriptions to display the list of subscriptions to which you are subscribed.
4. From View, select Disabled.
A list of disabled subscriptions is displayed.

5 Select the subscription to be activated, and click **Enable**.

A confirmation message is displayed.

6 Click **Yes**.

The alert is added to the Enabled list under View. Alert notifications related to this subscription will be issued.

---

### Modifying Subscriptions

Subscriptions are your way of registering for a specific alert. When you subscribe to an alert you, or another employee has defined, a copy of the original alert is created, to which your subscription is linked. This way, if you modify one of your subscriptions, only your copy of the alert to which you subscribed is effected. Your changes are not applied to the subscriptions of other employees.

**Note:** You can only modify subscriptions to which you are subscribed.

Editing a subscription does not modify the alert to which it is attached, it modifies the copy of the alert.

For example, if user A created the alert to which you are subscribed and modifies any of the properties, their changes are applied to your subscriptions, since you inherited these original alert properties when you subscribed to the alert.

You cannot edit subscriptions unless you are the owner of the subscription.

To modify a subscription:

1 Log on to Performance Scorecard.

2 In the Viewer, select **Browser View**.

3 Click **Subscription**.

   The list of existing subscriptions to which you are currently subscribed is displayed.

4 Select the subscription that you want to modify and click **Edit**.

   The Setup page of the alert to which the subscription is attached, is displayed.

5 Modify all alert attributes as required and click **Save**.

---

### Alert Notifications

Alert notifications are messages whose content and delivery options are defined when you create alerts. The alert notifications are sent to users using your organization’s SMTP mail server.

Alert notifications contact you and other subscribers when the business objects being monitored are in an alert state, meaning the criteria that gauges their status, such as result or score values,
fall inside or outside of a pre-defined acceptable range. This quickly identifies the key business objects in an application that require your prompt investigation.

See:

* “Notification Types” on page 157
* “Responding to Notifications” on page 157

**Notification Types**

The following types of alert notification messages are sent:

- Alert Activated notification is sent to all the alert’s subscribers when an alert assigned to a business object is triggered.
- Alert Concluded notification is sent when a business object is no longer in a state of alert.

The frequency with which you and other subscribers receive alert notifications is determined by the conditions specified on the Message Setup tab of each alert’s Setup page.

**Tip:** If an alert notification is sent but not successfully delivered, an error is flagged in HyperionAlerter.log. This file is located in <application server>/webappsconf/log.

**Responding to Notifications**

Based on the criteria and conditions specified, when an alert is triggered, users subscribed to the alert receive a message in their E-mail application inbox.

You can respond in one of these ways to the alert notification:

- Click the first option to acknowledge receipt of the alert notification. An HTTP request is sent to the Alerter to record your acknowledgement. If you specified on the alert’s Messages Setup tab that no subsequent alert notifications will be sent after acknowledgement, no additional notifications for this alert will be sent until an alert condition changes.

- Click the second option to deactivate or unsubscribe from the alert if you no longer want to receive notifications. The alert is removed from your Subscription List.

- Select the third option to investigate the alert by examining the initiatives, measures, and scorecards in your application. You are prompted for your Performance Scorecard login credentials and taken to your Home page.
Part 3: Analyzing Data Using Reports and Portlet Pages
General Report Tasks

With a few exceptions, you can perform these tasks on all reports:

- Drill-down on objects as follows to access more information:
  - Measures—You can drill down on dimensional measures and expand composite measures to view children. You can drill down on scorecards revealed by expanding composite measures.
  - Scorecards—Select scorecards to view its constituent measures and scorecards. Select any measure on a scorecard to view its details or children.
  - Initiatives—Select any initiative to display its dependant, child, sub-initiatives.
- Resize columns by dragging and dropping them
- Modify the default content of reports by selecting Edit, and then Customize.
- Read, create, and respond to notes by selecting the notes icon, 📝
- View previous performance levels by accessing historic measure and scorecard data by selecting performance indicators.
- Sort data displayed in columns alphabetically, or by ascending or descending values by selecting the Sort icon, 📊.
Using the Measure Performance Report

The Measure Performance Report provides an overview of the performance of all the measures that you can view. Measures are grouped by perspective. Composite and dimensional measures are displayed in hierarchies that you can expand to access more information.

Figure 10 Measure Performance Report

<table>
<thead>
<tr>
<th>Measure</th>
<th>Status</th>
<th>Target</th>
<th>Score/Target</th>
<th>Status/Target</th>
<th>Benchmark</th>
<th>Score/Benchmark</th>
<th>Status/Benchmark</th>
<th>Stretch</th>
<th>Score/S仍将</th>
<th>Status/Score</th>
<th>Status/Stretch</th>
<th>Confidence</th>
<th>Score (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue Costs</td>
<td>450,000</td>
<td>172.20</td>
<td>250,000.00</td>
<td>69.96</td>
<td>--</td>
<td>--</td>
<td>19,176,241</td>
<td>19,176,249</td>
<td>--</td>
<td>172.20</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Growth in Net Profit</td>
<td>3.00</td>
<td>233.33</td>
<td>3.00</td>
<td>233.33</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>233.33</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase in Shares</td>
<td>250,000.0</td>
<td>205.97</td>
<td>375,000.0</td>
<td>190.07</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>205.97</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash Flow</td>
<td>56.00</td>
<td>42.11</td>
<td>87.00</td>
<td>41.24</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>42.11</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology Under Review</td>
<td>8.00</td>
<td>60.00</td>
<td>8.00</td>
<td>50.00</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>60.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality</td>
<td>12.50</td>
<td>80.40</td>
<td>20.00</td>
<td>80.25</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>80.40</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To open the report, select the Browser View, select Reports, and then select Measure Performance.

Although you can customize the report settings, the following information for each measure is displayed.

- If unread notes exist
- Status column indicating overall performance levels using status symbols

**Note:** Performance is evaluated using the target selected from the Report Target list on the toolbar. If you customize the report to assess measure performance using multivalue targets, columns for each multivalue target value contain the score and status symbol indicating measure performance against each target.

- Performance trend, indicating if performance has improved, declined, or is the same
- Current result value
- Current period-to-date result value. If entered manually, this value overrides period-to-date results calculated by a formula or function
- Current target value. Values for multivalue targets are also displayed.
- Unit that quantifies each measure, such as $(million) or # of Claims
- Current score as a percent
- Variance that represents, as a percent, the amount by which results deviate from those anticipated and represented by targets

You can perform these tasks:
Calculate measure data using another performance target by selecting it from the Report Target list on the toolbar.

Select individual measure to access their details and perform tasks such as enter target values, result values, create initiatives, and graph current or historic data. See “Using Measure Detail Reports” on page 164.

View the previous performance level and data of any measure, by its performance indicator

Change the content displayed by selecting Edit, selecting Customize, and applying any of these settings:

**Table 10  Measure Performance Report Options**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show composite and dimensional measures as trees</td>
<td>Displays composite and dimensional measures hierarchies. <strong>Note:</strong> If selected, you cannot export to Excel.</td>
</tr>
<tr>
<td>Name</td>
<td>Displays the name of each measure.</td>
</tr>
<tr>
<td>Notes</td>
<td>Indicates if new unread notes exist.</td>
</tr>
<tr>
<td>Status</td>
<td>Displays the performance level, as a symbol, for measures.</td>
</tr>
<tr>
<td>Trend</td>
<td>Displays the performance trend for each measure. This indicates if performance has improved, declined, or not changed.</td>
</tr>
<tr>
<td>Result</td>
<td>Lists the result for all measures.</td>
</tr>
<tr>
<td>Target</td>
<td>Evaluate performance and perform calculations using the report target. This is the target selected from the Report Target list on the toolbar.</td>
</tr>
<tr>
<td>PTD result</td>
<td>List the result of period-to-date function applied to measures.</td>
</tr>
<tr>
<td>Units</td>
<td>Displays the unit quantifying measure results.</td>
</tr>
<tr>
<td>Score</td>
<td>Displays measure scores.</td>
</tr>
<tr>
<td>Show status as background color</td>
<td>Displays the color selected for the appropriate performance indicator in the score cell on the report.</td>
</tr>
<tr>
<td>Variance (%)</td>
<td>Displays the percentage by which measure results deviate from their target. For example, if the target for Measure A is 200, and the result is 160, variance is (200-160)/100.</td>
</tr>
<tr>
<td>Data Confidence (fraction)</td>
<td>Displays, as a fraction, the extent to which missing results for dimensional or composite measures impact the performance of related measures. For example, if a dimensional measure has three children, and only one has a result, the confidence value is 1/3.</td>
</tr>
<tr>
<td>Data Confidence (%)</td>
<td>Displays, as a percent, the extent to which missing dimensional or composite measure results impact measure performance. For example, if a dimensional measure has three children, and only one has a result, the confidence value is 33%.</td>
</tr>
<tr>
<td>Targets Shown</td>
<td>Create columns that assess measure performance using each target that you select. You can represent performance levels using scores or status symbols, and display target values.</td>
</tr>
</tbody>
</table>
Using Measure Detail Reports

The tabs on a Measure Details Report enable you to perform these tasks:

- View basic measure setup data such as associated employees, frequencies and formulas on the General tab.
- Graph current and previous result values, target values, and scores on the Chart tab.
- View previous performance levels, target values, and result values on the Trending Table tab.
- View and create initiatives on the Initiative tab.
- View, and if authorized, enter or modify result and target values on the Result tab and Target tab.
- View the other objects such as scorecards, and formulas, with which a measure is associated using the Part Of tab.
- View and create notes pertaining to the measure on the Notes tab.

To substitute the tabs on the Measure Details Report with your own reports, see “Customizing Measure Detail Reports” on page 171.

To access a Measure Details Report:

1. Select the measure on the Browser View or any report.

   The report opens on the Trending Table tab displaying previous result and target values. If you use multivalue targets, these values are computed using each target. If the tab has been customized additional or different data may display.

   **Figure 11 Measure Details Trending Table**

<table>
<thead>
<tr>
<th>General</th>
<th>Chart</th>
<th>Trending Table</th>
<th>Initiative</th>
<th>Result</th>
<th>Targets</th>
<th>Part Of</th>
<th>Notes</th>
<th>Annotation &amp; Initiative</th>
<th>Results &amp; Targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production and Admin related costs</td>
<td>Result</td>
<td>185,235,476.00</td>
<td>185,235,476.00</td>
<td>185,235,476.00</td>
<td>185,235,476.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Target</td>
<td>185,000,000.00</td>
<td>185,000,000.00</td>
<td>185,000,000.00</td>
<td>185,000,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PTE Result</td>
<td>97.75%</td>
<td>97.75%</td>
<td>97.75%</td>
<td>97.75%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production and Admin related costs</td>
<td>Target</td>
<td>185,000,000.00</td>
<td>185,000,000.00</td>
<td>185,000,000.00</td>
<td>185,000,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benchmark</td>
<td>185,500,000.00</td>
<td>185,500,000.00</td>
<td>185,500,000.00</td>
<td>185,500,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. To view the result values, target values, scores, and performance levels from another period, click the calendar icon, [ ], in the **To** and **From** fields to specify a date range.

Accessing General Measure Data

The General tab of a Measure Details report provides basic measure information specified by an application designer.
To access general measure data, click the measure on the Browser View or any report, and select the General tab.

The following information is displayed. To learn more, see “About Measures” on page 71.
- Current performance status, score, and performance trend. The trend symbol indicates if performances has improved, remained the same, or declined. This information is displayed at the top of the report.
- Primary and secondary perspectives to which the measure is assigned
- Day on which the measure started collecting data
- Names of employees assigned to the measure to perform tasks such as set targets. Select each employee name to send them an E-mail.
- Links to related reports
- Result values, scores, target values, and period-to-date formulas that evaluate measure data.
- Unit that quantifies results, such as dollars
- Result and target frequencies that determine how often results are collected and targets defined.
- Data source, which could include external repositories or an Essbase database, from which results are taken.
- Performance indicators and ranges that evaluate and represent performance

Application designers can change this setup information by selecting Edit, and then Edit.

**Graphing Measure Data**

The Chart tab on a Measure Details Report enables you to graph the following data by a period of time that you specify:
- Result values
- Period-To-Date result values
- Score (percent)
- Target value

You can perform these tasks:
- Graph previous data by clicking the calendar icon, ⏳, in the To and From fields to specify a date range.
- Recalculate and graph data using another target or comparator by selecting it from the Report Target list on the toolbar.
- Graph different information by selecting Edit, then Customize, and choosing any of these options:
  - Display legend on chart—Text describing the data used
- **Display uncollected results in line chart**—Display indicators or substitute values for unavailable result values
- **y axis automatically**—Ensure that values are graphed legibly by selecting scale.
- **Score**—Graph scores. To display scores in another color, select the **Color** box and choose a different color from the palette that is displayed.
- **Result**—Graph result values. To display results in another color, select the **Color** box and choose a different color from the palette that is displayed.
- **PTD result**—Graph calculated period-to-date result values. To display results in another color, select the **Color** box and choose a different color from the palette that is displayed.
- **Targets**—Graph target values. To display these values in a different color, select the **Color** box and choose the color from the palette that is displayed.
- **Targets shown**—Calculate and graph performance levels using other targets that you select.
- **Combo**—Present data in one graph that represents values using bars and lines.

## Using Initiatives

The Initiatives tab on a Measure Details report enables you to view and update the initiatives associated with the measure. The owner and due date of all initiatives are displayed. The Initiatives tab also enables you to create new, or update existing measure initiatives.

- To contact the owner of each initiative by E-mail, select their name.
- To change the data displayed, select **Edit**, and then **Customize**.
- To create initiatives, perform these tasks:
  1. Create the appropriate reporting period. See “Creating Reporting Periods and Categories” on page 113.
  2. Right-click and select **Add**. The Initiative Setup page is displayed providing details such as time-dependant information, variables, members, completion date and so on.
  3. Enter a name and summarize the purpose of the initiative.
  4. In **Dependencies**, review the other objects and factors involved:
     - Parent initiative (if applicable)
     - Participating objects to which the initiative is attached
     - Types of participating objects, such as accountability elements
  5. From **Type**, select the kind of initiative.
  6. From **Priority**, select a level that represents the importance of initiative.
  7. Select **Active** to launch the initiative.
  8. In **Owners**, click **Select** to choose the employees responsible for the initiative and click **Apply**
9. **Optional:** Under **Notify**, select the employees to notify by alert, regarding changes to or the progress of the initiative.

10. In **Cost**, enter the actual or estimated value required to implement the initiative. Click **Select Unit** to choose a quantifying unit, such as $000s or #Employees.

11. In **Effort**, enter the days required to complete the initiative. Use a decimal. For example, 10.0 person days. Click **Select Unit** to attach a unit to the value, such as $000s or #Employees.

12. Beside **Initiative Data**, use the arrows to specify the reporting period. This defines the intervals during which annotations can be associated with the initiative.

13. In **Start Date** and **Due Date**, click the calendar button, to select the day on which the initiative begins and the date by which it should be completed.

14. Under **Annotation**, enter an annotation to be associated with this initiative. If the initiative spans multiple reporting periods or cycles, attach annotations for each cycle. The annotations are updated during the initiative to monitor the project status and input.

**About the Result Tab**

The Result tab of the Measure Details Report provides this information:

- Results date—Days on which result values should be collected or entered, determined by the result frequency.
- Collection date—Days by which result values must be collected or entered. Increase this by specifying a collection extension.
- Results that are entered or calculated.
- Period-to-date results calculated by a formula or function.
- Period-to-date results that were manually entered. These results override those calculated.

The locked icon, , indicates that the period in which you can specify results has expired. To resolve this issue, increase the collection extension. See “Defining Formulas and Frequencies” on page 85.

Result Collectors can modify, delete, or enter result and period-to-date result values. See “Entering Measure and Variable Result Values” on page 167 and “Modifying and Deleting Result Values” on page 168.

If authorized, you can change the measure setup, by selecting **Edit** and then **Edit**.

**Entering Measure and Variable Result Values**

You must be a Result Collector to enter result and period-to-date values. To associate yourself with a measure, see “Assigning Responsibilities” on page 51. If you use Essbase as an external data source, period-to-date values that you enter are written to the Essbase database.
To enter results and targets at the same time, see “Entering Results and Targets Simultaneously” on page 170.

To enter results:

1. **From the Browser View, perform a task:**
   - Select Reports, and then Result Collection.
   - Select Reports, then Measure Performance, select the measure from the report that is displayed, and then click Results. The following information is displayed:
     - Results Date—Lists the days on which results should be collected or entered. This is determined by the result frequency.
     - Collection Date—Lists the days by which results must be collected or entered. This can be increased by specifying a collection extension.
     - Result—Contains the result entered or calculated.
     - Calculated PTD Results—Contains results generated by a formula or function.
     - Entered PTD Results—Contains period-to-date results that you want to input without using a formula or function.

2. To view previous result values, click the calendar icon, in To and From to specify a date range.

3. To only enter missing results, select Only Display Uncollected Measures, click in empty boxes and enter values.

4. To enter new result value, click the calendar icon, to specify a date range in the To and From fields, and then enter results in the boxes provided.

5. To enter variable results, select the Variable tab and repeat steps 2 and 3.

6. Click Save.

### Modifying and Deleting Result Values

You must be a Result Collector to change or delete results. Although you cannot modify a period-to-date values generated by a formula or function, any period-to-date value that you enter overrides those generated. If you use Essbase as an external data source, modified period-to-date results are written to the Essbase database.

To modify or delete result values:

1. **From the Browser View, perform a task:**
   - Select Reports, and then Result Collection.
   - Select Reports, then Measure Performance, then the measure from the report that is displayed, and then click either the Results or the Results and Targets tab.
Perform a task:

- To change result values, select the value, click **Delete**, and enter a different value.
- To delete results value, select the value and click **Delete**.

If you deleted a result that was gathered on the scheduled collection date, the value becomes a double dash (-->). The collection date remains.

### Entering Target Values

Targets, also called comparators, specify the result values, that you expect a measure to collect. To create new targets for which you can enter values using reports, see “Creating Targets” on page 78.

To enter target values:

1. From the Browser Viewer or any report, select the measure.
2. On the Measure Details Report that is displayed, select **Targets**.

The Targets tab lists the recent targets established. If targets are multivalue, and sub-targets representing target threshold values are used to evaluate performance, columns for the sub-targets display.

To view previous targets, click the calendar icon, and select a date range.

3. To enter new single or multivalue target values, click the calendar icon, in **From** and **To** to select a date range.
4. Enter values in the boxes in the **Target** column, or in the columns for subtargets.
5. Click **Save**.

The target will be used on the date you specified.

### Modifying and Deleting Target Values

You must be a Target Setter to change or delete single, or multivalue target values. To assign yourself as a Target Setter, see “Assigning Responsibilities” on page 51.

To modify or delete targets:

1. From the Browser View or any report, select the measure.
2. On the Measure Details Report, select **Targets**.
3. To view previous targets value, click the calendar icon, to specify a date range using the **To** and **From** fields.
4. Perform a task:
   - To change target values, select the value, click **Delete**, and enter a different value.
   - To delete target values, select the value and click **Delete**.
If you deleted a result that was gathered on the scheduled collection date, the value becomes a double dash (--). The collection date remains.

5. **Click Save.**

### About the Results & Targets Tab

The Results & Targets tab enables you to view all results and targets for a measure. Result Collectors can enter, modify, or delete results. Target Setters can enter, change, or delete target values. If you use Essbase as an external data source, period-to-date values entered on this tab are written to the Essbase database.

The Results & Targets tab provides this information:

- Days on which result values should be collected or entered. This is determined by the result frequency.
- Days by which results must be collected or entered. This can be increased by specifying a collection extension.
- Result values that are entered or calculated.
- Period-to-date result values calculated by a formula or function.
- Period-to-date result values that you want to input without using a formula or function. This result overrides calculated results.
- Targets defined for the measure. If you use multivalue targets for which subtargets exist, columns for these values are also displayed.
- Target values calculated by formulas.

To view previous result and target values, click the calendar icon, in **To** and **From** to specify a date range.

If you do not want to display target or result data generated by formulas, select **Hide Calculated Values**.

### Entering Results and Targets Simultaneously

If you are a Target Setter, the Results & Targets tab to enter, modify, or delete target values. If you are a Result Collector, use this tab to enter, modify, or delete result values. If you use Essbase as an external data source, period-to-date values entered on this tab are written to the Essbase database.

**Note:** To enter data on this tab, an administrator must remove the Results and Targets tab web page restriction for your account. See Chapter 2 of the *Oracle Hyperion Performance Scorecard Administrator’s Guide*.
To enter results and targets at the same time:

1. From the Browser View or any report, select a measure.
2. On the Measure Details Report, select the **Results & Targets** tab.
3. To view previous result and target values, click the calendar icon, in **To** and **From** to specify a date range.
4. To only view and enter missing results, select **Only Display Uncollected Measures**, click in empty boxes and enter values.
5. To enter new result values, click the calendar icon, in **To** and **From** to specify a date range, and then enter a result in the box provided.
6. To enter new single or multi-target values, click the calendar icon, in **To** and **From** to select the period of time during which the targets will be used. The enter values in the appropriate target column.
7. Click **Save**.

**Identifying Measure Use**

The Part Of tab on a Measures Details Report enables you to view the scorecards on which a measure is used, and the strategy elements and the accountability elements with which it is associated.

To view the objects that use a measure, select the measure on the Browser Viewer or any report, and then select the Part Of tab. Select associated objects to view more information.

**Using Notes**

Use the Notes tab on a Measure Details Report to create, read and reply to notes pertaining to the measure. The new notes symbol, indicates that unread notes exist. See “Using Notes and Annotations” on page 125.

**Customizing Measure Detail Reports**

In addition to applying report options, you can personalize Measure Detail Reports as follows:

- Attach links to external Web pages on the General tab of the Details Report for the measure.
  
  To attach links, perform these steps:
  
  1. Select **Edit**, and then **Edit** to return to the measure setup page.
  2. Enter the name of the page in **Link Name**.
  3. Enter the URL of the page in **Link URL**.
  4. Specify how you want the linked page to display from the Measure Details Report:
     
     - To open pages in individual browser windows, select **Launch in New Window**.
     - To embed pages in separate tabs on the report, select **Display URL In Tab**.
Tip: These reports can also be accessed on the Browser View by right-clicking the measure and selecting View from the context menu.

- Replace the default tabs with custom reports by performing these steps:
  1. Select Edit, and then Edit to return to the measure setup page.
  2. In Link Name, enter the key for tab to replace. For example, to replace the Chart tab, enter trendingChart.
     - General = general
     - Chart = trendingChart
     - Trending Table = trendingTable
     - Initiative = initiatives
     - Results = results
     - Targets = comparators
     - Part Of = reverse
     - Notes = notes
     - Annotations and Initiatives = annotationsInitiatives
     - Results and Targets = resultsAndTargets
  3. In Link URL, enter the URL to the report that you want to use instead.

Using the Scorecard Performance Report

The Scorecard Performance Report provides the status and score of the scorecards that you can view. To open the report, select Reports, and then select Scorecard Performance. The report displays scorecards by type in Employee, Accountability, and Strategy Scorecard hierarchies. You can perform these tasks:

- Expand and drill-down on a scorecard to view the measures or scorecards used on the scorecard.
- Access details about each measure on a scorecard by selecting the measure. See “Using Measure Detail Reports” on page 164.
- Access details about lower-level scorecards used on a scorecard by selecting the scorecard. See “Using a Scorecard Details Report” on page 173.
- To select an employee’s primary, personal scorecard that monitors their performance, select Employee Scorecards and then employee.
- View previous scorecard performance by selecting the corresponding performance indicator.
- Select the notes icon, , to read and respond to scorecard-related notes.
- Change the content displayed by selecting Edit, then Customize and any of these options:
  - Group Scorecards By—Display scorecards by type or category. Select No Grouping to list scorecards alphabetically.
Using a Scorecard Details Report

To view a variety of scorecard information, select the scorecard on the Scorecard Performance Report or another page. Use these tabs to access a variety of information:

- **General tab**—Access basic information about the scorecard such as its Owner, Members, Parent, and scorecard scoring range. See “Accessing General Scorecard Data” on page 174.
- **Scorecard tab**—View current status, name, current score, and trend. This information is displayed at the top. View the status, score, result value, targets value, and weighting of measures and scorecards on the scorecard. Access information about each scorecard measure such as status, score, result, and weighting.
- **Chart tab**—Graph data in a variety of formats. See “Graphing Scorecard Data” on page 175.
- **Trending Table tab**—Display previous scorecard result values and refer to “Viewing Past Performance Using Trend Data” on page 176.
- **Initiative tab**—View, create, or update initiatives assigned to the scorecard. See “Creating Initiatives” on page 118.
- **Targets tab**—Display the target start date, the target value, and the benchmark value.
- **Results tab**—Display the result date, collection date, and value for a measure.
- **Part Of tab**—Display the objects, such as scorecards, strategy elements, or employees with which the scorecard is associated. Also displays the formulas in which the object is referenced.
- **Scorecard tab**—View the following:
  - Current status, name, current score (as a percentage) and trend. This information is displayed at the top of the tab.
  - A list of each measure and scorecard used on the scorecard, grouped by perspective.
  - The status, score, result, target of, and weighting of each constituent measure and scorecard. See “Viewing Scorecard Component Data” on page 174.
Accessing General Scorecard Data

The General Tab on a Scorecard Details Report provides this information about the employee, strategy element, accountability team, or strategy map that the scorecard evaluates:

- **Employee**—Displays information such as name, employee number, title, manager, and contact information.

- **Strategy tree element**—Displays the parent (element displayed above the element whose scorecard you are viewing on a Strategy tree). Also displays the employees associated with the element, the groups and business areas responsible for fulfilling the strategy element, and the performance indicator ranges that evaluate and represent scorecard performance.

- **Accountability map element**—Displays the parent (accountability element displayed above the element whose scorecard you are viewing on an Accountability map). Also displays the strategy elements such as strategic objects, which the accountability element (usually a business area or task force) must achieve or on which they work. The performance indicator ranges that evaluate and represent scorecard performance are also displayed.

- **Strategy map element**—Displays the owner of the element, information about the accountability elements responsible, and the performance indicator ranges that evaluate and represent scorecard performance.

To access this information, select a scorecard on the Browser View or any report, and select the **General** tab on the report that is displayed.

Viewing Scorecard Component Data

Use the Scorecard tab on the Scorecard Details Report to view this information about the measures and scorecards on a scorecard:

- **Current status**—name, current score (percentage) and trend. This information is displayed at the top of the tab.

- **This measure information:**
  - Name and perspective
  - Status and score
  - Result value and weighting. The result is the raw, numeric result value collected. The weighting is how much this result impacts the overall scorecard score. Underlined values indicate missing results. If you are the Result Collector, you can enter measure results. See “About the Result Tab” on page 167.
  - Target value which is the anticipated measure result value. To evaluate performance using another target, select it from the Performance Target list on the Performance Scorecard toolbar.
  - Data Confidence that represents the extent to which missing composite measure or dimensional measure results impact overall performance.
Graphing Scorecard Data

Use the Charts tab of the Scorecard Details Report to display current and previous scorecard values in these formats:

- **Scoring Dashboard**—Displays the overall performance of the scorecard. It also displays the performance of perspectives, indicating how impact the overall scorecard score.
- **Scorecard Perspective Scores bar graph**—Displays the raw and weighted score of each perspective on the scorecard.
- **Scorecard Trend graph**—Displays scorecard score over time.

You can perform these tasks:

- Graph data and values from a previous reporting period using the calendars.
- Change the data that is displayed and how it displays, select **Edit**, then **Customize**, and then apply any of these settings:
  - **Set system defaults**—Apply customizations to the entire application.
  - **Display legends**—Display brief descriptions of the data graphed.
  - **Short perspective names**—If available, use abbreviated perspective names.
  - **Scale y axis automatically**—Ensure that values display legibly.
  - Select the values, graphs, and charts to use as described in this table:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dial</td>
<td>View the scorecard on the scoring dashboard.</td>
</tr>
<tr>
<td>Perspective</td>
<td>View the scores of each perspective used on the scorecard in a bar graph format. To graph the raw and weighted measure scores, select Show Weighted Scores and Show Scores.</td>
</tr>
<tr>
<td>Trend (line)</td>
<td>Display the score achieved by the scorecard in the specified time period.</td>
</tr>
<tr>
<td>Trend (bar)</td>
<td>View the score achieved by the scorecard in the past six months in a bar graph.</td>
</tr>
<tr>
<td>Scorecard Radar</td>
<td>Display a radar chart of all your scorecard measure's performance.</td>
</tr>
<tr>
<td>Scores</td>
<td>Select this option with Perspective to view the raw scores of each perspective used on the scorecard in a bar graph format.</td>
</tr>
<tr>
<td>Show Weighted Scores</td>
<td>Select this option with Perspectives to view the weighted scores of each perspective used on the scorecard in a bar graph format.</td>
</tr>
<tr>
<td>Result</td>
<td>Select this option with Scorecard Radar to radar chart of all your scorecard measure results.</td>
</tr>
<tr>
<td>Target</td>
<td>Select this option to include measure target values in the radar chart.</td>
</tr>
<tr>
<td>Normalize Results to 100</td>
<td>Select this option with Scorecard Radar to fit scorecard measures on the radar graph.</td>
</tr>
<tr>
<td>Comparators: Targets</td>
<td>Evaluate and graph performance using another report target.</td>
</tr>
<tr>
<td>Colors</td>
<td>Select a color for each setting and perspective to represent those values on the chart.</td>
</tr>
</tbody>
</table>
Viewing Past Performance Using Trend Data

Use the Trending Table tab on a Scorecard Details Report to view the previous scores, targets, and performance levels of measures on a scorecard. This provides a performance history.

➤ To access trending data:

1 From the Browser View, select the scorecard as follows.
   - To view employee scorecard trend data, select Employee, and then employee.
   - To view accountability element or Strategy map trend data, select Map Type, then Map, and then element.
   - To view Strategy tree element trend data, select Strategy Trees, Strategy Tree, and then element.

2 Select Scorecards and then scorecard.

3 On the Scorecard Details Report that is displayed, select the Trending Table tab.

This information is displayed for each measure on the scorecard:

- Result value
- Target value
- Score as a percent
- Status
- Trend indicating if performance has improved, declined, or remained the same since the previous period

Using Notes

Use the Notes tab on the Scorecard Details Report to create, read and reply to notes and discussion threads. See “Using Notes and Annotations” on page 125.

Using the Employee Profiles Report

The Employee Profiles Report enables you to view the following information about all employees in an application:

- The scorecards associated with each employee.
- Employee number
- E-mail address
- Business role and department
- Manager
- Current performance status
- Performance trend indicating if performance has improved, declined, or remained the same
To open the report, select Reports and then Employee Profiles. You can perform these tasks:

- Select employee names to view more information such as contact information, and the strategy elements and accountability elements with which the employee works.

- View information about the lower-level scorecards and measures used on each employee’s scorecard, by expand the employee name, and each scorecard. Drill down on individual measures and scorecards to access details.

- Select the name of the manager to send them an E-mail

- Performance trend indicating if performance has improved, declined, or remained the same

- Modify the information shown by default on the report by selecting Edit, then Customize, and applying any of these options:
  - Employee name—Display the name of each employee
  - Employee number—Display the number of each employee
  - Employee E-mail—Display an E-mail link for each employee
  - Employee department—Display the department in which each employee works
  - Employee manager—Display the name of employee managers
  - Scorecard status—Display the performance status of each employee as evaluated by their primary scorecard.
  - Scorecard trend status—Indicate if employee performance has improved, remained the same, or declined.

**Using Employee Detail Reports**

Use an Employee Details Report to perform these tasks

- General tab—View contact and business information for an employee. This tab also enables you to view the performance indicators that evaluate employee scorecard data to assess employee performance levels. To contact the employee, select the E-mail link displayed. If authorized, you can modify the profile by selecting Edit and then Edit.

- Accountability tab—View the objects, such as measures or accountability elements to which the employee is assigned, and the tasks that they perform, such as collecting results.

- Scorecard tab—View the employee’s primary scorecard that assess their personal performance.

- Chart tab—Graph the employee's scorecard data in a variety of formats.

- Trending tab—View the previous performance of the measures and scorecards on the employee’s scorecard. This enables you to see if the employee’s performance has improved, declined, or remained the same over time.
Using the Active Alerts Report

The Active Alerts Report lists the alerts to which you are subscribed, that have been triggered, and are active. Use the report to identify the objects that require investigation and action to restore them to a normal status.

➢ To open the Active Alerts Report:

1 From the Browser View, select Reports, and then Active Alerts.

All the active alerts to which you are subscribed are displayed.

The report groups active alerts by alert type, such as Initiative Past Due. The report provides this information about triggered alerts:

- Type of object (scorecard, initiative, and so on) for which the alert has been triggered
- Current status, trend, and result value of the business object
- Name of the alert attached to the business object that has been triggered
- Acknowledged column which displays the date on which a user responded to an alert notification by acknowledging it.

Based on the type of alerts that is active (Measure In Status, for example), additional information is displayed on the report:

- Criteria, such as a status or range, that determines when alerts attached to the business object are triggered and activated.
- Expected collection date for the measure, if applicable
- Due dates

2 Access more information about each object in alert by selecting it.

Using the Result Collection Report

The Result Collection Report shows all measures and variables you can view. It also allows you to enter result values, target values, and PTD result values for the measures for which you are a Result Collector or Target Collector. Select measures on the report to perform these tasks:

- Enter missing result values for measures for which you are the Result Collector. You can enter period-to-date results if a period-to-date formula is not used
- Modify and delete result values for measures for which you are the Result Collector
- View previously collected result values
- Modify variable results
- Enter single, or multivalue target values

➢ To enter measure or variable results:

1 On the Browser View, select Reports, and then select the Result Collection tab.
To only display and enter results for measures that are missing results, select Only Display Uncollected Measures and enter the results in the appropriate column.

To list result values, PTD result values, and target values in ascending or descending order, click the sort icon, \(\text{ sorter }\), in each column header.

To enter results for the current period, enter the values in the appropriate boxes.

To enter or modify result values previously specified, click the calendar icon, \(\text{ calendar }\) in the To and From fields to specify a date range, then enter results in the appropriate column.

Click Save.

To modify the content displayed on this report, select Edit, then Customize, and apply any setting:

- Name—Displays the name of each measure or variable for which you can enter results
- Parents—Displays measures that use the current measure or variable in result formulas.
- Result Date—Displays the result date for each measure’s specified collection date
- Collection Date—Displays the date by which results should be collected
- Result—Displays the current result value for each measure or variable
- Target—Displays the target values for each measure or variable
- Targets Shown—Displays values for the targets you select

### Entering Variable Values

To enter variable results:

1. On the Browser View, select Reports, and then select the Result Collection tab.
2. Select the Variable tab.
3. To list result values, PTD result values, and units in ascending or descending order, click the sort icon, \(\text{ sorter }\), in each column header.
4. To enter variable values for the current period, enter the values in the appropriate boxes.
5. To enter or modify variable values previously specified, click the calendar icon, \(\text{ calendar }\) in the To and From fields to specify a date range, then enter values in the appropriate column.
6. Click Save.

### Using the Initiative Status Report

Initiatives are tasks that can be prioritized and assigned to strategy elements, accountability elements, and measures to which you have access. The Initiative Status Report lists the measures, and strategy and accountability elements to which initiatives are attached and who is responsible
for implementing and completing each initiative. It also identifies the status, priority, and assigned due date of each initiative. Use the report to update initiative progress or create new initiatives.

To launch the Initiative Status Report, select Reports, then Initiative Status. To view only the initiatives for which you are responsible, select Show My Initiatives. This information is displayed for each initiative:

- Owner of the initiative
- Current and past due dates
- Start date
- Percentage complete
- Current status
- Priority Level
- Associated employees
- Associated measures, accountability elements, and strategy elements

You can perform these tasks:

- Update the status of or edit initiatives by selecting them.
- Create initiatives by right-clicking on the report and selecting Add. See “Creating Initiatives” on page 118.
- Modify the default information displayed on the report by selecting Edit, then Customize, and applying these options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set System Defaults</td>
<td>Apply customizations to an entire application.</td>
</tr>
<tr>
<td>Group by associated object type</td>
<td>Group initiatives of the same type together.</td>
</tr>
<tr>
<td>Show trend view as default</td>
<td>Display tracking information such as percentage complete and status.</td>
</tr>
<tr>
<td>Name</td>
<td>Display initiative names</td>
</tr>
<tr>
<td>Status symbol</td>
<td>Use performance indicators representing initiative status.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Display when initiatives start.</td>
</tr>
<tr>
<td>Completion date</td>
<td>Display completion dates.</td>
</tr>
<tr>
<td>Cost</td>
<td>Display the dollar cost.</td>
</tr>
<tr>
<td>Creator</td>
<td>Identify the employees who created initiatives.</td>
</tr>
<tr>
<td>Status</td>
<td>Display the current status, such as “In Progress”.</td>
</tr>
<tr>
<td>Priority</td>
<td>Display initiative priority (1 is the highest).</td>
</tr>
</tbody>
</table>
Using the Strategy Report

Use the Strategy Report to review the objectives, measure targets, initiatives and owners for elements on the Strategy map. A separate report is generated for each Strategy map.

1. **On the Browser View, select Reports, and then Strategy.**

The following information is displayed:

- Objectives column displays separate sections for each strategic objective on the map, for each perspective, grouped by strategic theme.
- Measures column displays all measures on the scorecard for each strategic objective.
- Targets column displays the current target value.
- Initiatives column displays all initiatives for each measure.
- Owners column displays the owners for each measure.
- Specified due date and percentage completed for each initiative.
- Employees associated with each initiative.

2. **To view the corresponding Strategy map, select Show Strategy Map.**

3. **To change the data displayed, select Edit, then Customize, and apply any of these options:**

   - Strategy objective—Display the strategy objectives that are associated with the Cause and Effect map
   - Measure—Display associated measures
   - Measure target—Display the target values of associated measures
Initiative—Display initiatives attached to the map or elements on the map

Initiative owner—Display the employee responsible for initiatives.

Copying and Pasting Report Data

You can copy and paste data on reports to another application, such as Microsoft Excel. Data you copy from Excel and paste into Performance Scorecard uses Excel formatting. For example, if decimal places in Excel are set to zero, 459.32 is displayed as 459.

To copy and paste data:

1. Select the data form, such as a scorecard or spreadsheet, that contains the data.
2. Select Edit, and then Copy.
3. On the destination data form, select Edit, and then Paste.
Overview

Build EPM Workspace pages to build custom views that can contain a variety of Performance Scorecard and other Oracle Hyperion 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.
You can build 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

**What You Can Do On EPM System Pages**

- Access more data about measures, scorecards, employees, and initiatives on Workspace pages 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, . See “Customizing EPM Workspace Pages” on page 186.

Remove objects from Workspace pages by clicking the Remove button, .

Creating EPM Workspace Pages

To change the information displayed for the objects you add to Workspace pages, or to display data previously collected, click the Edit button, on each component window and see “Customizing EPM Workspace Pages” on page 186.

To create EPM Workspace pages:

1. Select File, then New, and then Workspace page.
2. Select the template, such as two columns, for the page layout.
3. Select HPS Repository from the Source list to the left.
4. From view pane to the left, drag and drop the data to use as follows:
   - To add employee scorecards—Select Employee, and then the employee or Employee List, and then the employee.
     
     You can change the data displayed (scores, status levels etc.) and the format in which it displays (such as graphs, charts, or trending table) by clicking the Edit button, . See “Customizing EPM Workspace Pages” on page 186.
   - To add measures and dimensional measures—Select Measures, and then the measure, or Measure List, and then the measure.
     
     The performance level of the measure is displayed in addition to result values, scores, and target values by date. You can change the kind of measure data that is displayed (initiatives, PTD results, trending data etc.) and the format in which it displays (such as a graph or chart) by editing the Workspace page. See “Customizing EPM Workspace Pages” on page 186.
   - To add provided reports—Select Reports, and then the report. This information is displayed:
     - Active Alerts—Identifies all alerts that have been triggered, such as scorecards departing from an acceptable range, in your application. Once you save the page, users will be able to select alerts to access more information.
     - Measure Performance Report—Result value, target value, and score for each measure by a time period that you can specify. Once you save the page, users will be able to select measures to access detailed information.
     - Scorecard Performance Report—The performance status, score, and trend (indicating how performance has changed) of all scorecards. Once you save the page, users will be able to select scorecards to access detailed information.
Employee Profile Report—Name, professional title, E-mail, performance status (as evaluated by primary scorecard), and performance trend (indicating how performance has changed) for all employees. Once you save the page, users will be able to select employees to access more information.

5 Enter a name for each component in the Title field.

6 To change the information displayed for the objects you add, click the Edit button, on each window and see “Customizing EPM Workspace Pages” on page 186.

7 Select File, and then Save.

For more information see the Oracle Hyperion Enterprise Performance Management Workspace User Guide.

Customizing EPM Workspace Pages

To change the information displayed while building Workspace pages, click the Edit button, on each component window. Click the Advanced button on the box that is displayed and select the options described in these topics:

- “Customizing Measure Data” on page 186
- “Customizing Scorecard Data” on page 187
- “Customizing Measure Performance Report Data” on page 187
- “Customizing Scorecard Performance Reports” on page 188
- “Customizing Active Alerts Reports” on page 188.
- “Customizing Employee Profile Reports” on page 189
- “Customizing Initiative Status Reports” on page 189

For information about change basic settings such as the size and scrolling of component windows on EPM Workspace pages see the Oracle Hyperion EPM Workspace User Guide.

Customizing Measure Data

- To insert a graph of measure data, select Chart from Default View
- To use data previously collected or generated, specify another data range using the To and From lists.
- To insert annotations, which are notes specific to reporting periods, select Annotations from Default View.
- To display data by collection period, select Trending Table from Default View
- Display or conceal any of the following:
  - PTD Result—Results calculated by period-to-date formulas or manually entered
- Result—Results collected during the period of time that you specify
- Target—Target value used during the period of time that you specify
- Score—Previous scores achieved during the period of time that you specify
- Status—Performance levels during the period of time that you specify
- Status as color—Apply the color corresponding to the performance level, such as green for good performance, to the page
- Trend—If performance has improved, declined, or remained the same
- Shown targets—Calculate the score or performance level of the measure using another target

**Customizing Scorecard Data**

- To insert a graph of scorecard data, select Chart from Default View
- To use previous data, specify another data range using the To and From lists.
- Display or conceal the following data:
  - Group by perspective—Display scorecard measures by perspective
  - Result—Display results
  - Target—Target values used to evaluate performance
  - Score—Previous scores
  - Status—Previous performance levels
  - Status as color—Apply the color corresponding to the performance level, such as yellow for acceptable performance, to the page
  - Trend—If the performance of the object that the scorecard evaluates, has improved, declined, or remained the same

**Customizing Measure Performance Report Data**

Select the data to display or conceal.

<table>
<thead>
<tr>
<th>Table 12</th>
<th>Measure Performance Report Options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Show composite and dimensional measures as trees</td>
<td>Displays composite and dimensional measures hierarchies. <strong>Note:</strong> If selected, you cannot export to Excel.</td>
</tr>
<tr>
<td>Name</td>
<td>Displays the name of each measure.</td>
</tr>
<tr>
<td>Notes</td>
<td>Indicates if new unread notes exist.</td>
</tr>
<tr>
<td>Status</td>
<td>Displays the performance level, as a symbol, for measures.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Trend</td>
<td>Displays the performance trend for each measure. This indicates if performance has improved, declined, or not changed.</td>
</tr>
<tr>
<td>Result</td>
<td>Lists the result for all measures.</td>
</tr>
<tr>
<td>Target</td>
<td>Evaluate performance and perform calculations using the report target. This is the target selected from the Report Target list on the toolbar.</td>
</tr>
<tr>
<td>PTD result</td>
<td>List the result of period-to-date function applied to measures.</td>
</tr>
<tr>
<td>Units</td>
<td>Displays the unit quantifying measure results.</td>
</tr>
<tr>
<td>Score</td>
<td>Displays measure scores.</td>
</tr>
<tr>
<td>Show status as background color</td>
<td>Displays the color selected for the appropriate performance indicator in the score cell on the report.</td>
</tr>
<tr>
<td>Variance (%)</td>
<td>Displays the percentage by which measure results deviate from their target. For example, if the target for Measure A is 200, and the result is 160, variance is ((200-160)/100).</td>
</tr>
<tr>
<td>Data Confidence (fraction)</td>
<td>Displays, as a fraction, the extent to which missing results for dimensional or composite measures impact the performance of related measures. For example, if a dimensional measure has three children, and only one has a result, the confidence value is (1/3).</td>
</tr>
<tr>
<td>Data Confidence (%)</td>
<td>Displays, as a percent, the extent to which missing dimensional or composite measure results impact measure performance. For example, if a dimensional measure has three children, and only one has a result, the confidence value is (33%).</td>
</tr>
<tr>
<td>Targets Shown</td>
<td>Create columns that assess measure performance using each target that you select. You can represent performance levels using scores or status symbols, and display target values</td>
</tr>
</tbody>
</table>

**Customizing Scorecard Performance Reports**

- **Group Scorecards By**—Displays scorecards by type, such as employee, or in categories. Select No Grouping to list scorecards alphabetically
- **Scorecard Name**—Displays scorecard names
- **Scorecard Notes**—Displays the notes icon that indicates if notes exist for scorecards
- **Scorecard Status**—Displays the performance indicator that represents the performance level of all scorecards
- **Scorecard Trend**—Displays trend symbols that indicate if performance levels have improved, declined, or remained the same.
- **Show status as background color**—Display scores in cells that take the color of the performance level

**Customizing Active Alerts Reports**

- Current status, trend, and result value of the business object
- Name of the alert attached to the business object that has been triggered
• Acknowledged column which displays the date on which a user responded to an alert notification by acknowledging it.

Based on the type of alerts that is active (Measure In Status, for example), additional information is displayed on the report:

• Criteria, such as a status or range, that determines when alerts attached to the business object are triggered and activated.

• Expected collection date for the measure, if applicable

• Due dates

**Customizing Employee Profile Reports**

Select the data to display or conceal:

• Employee name—Display the name of each employee

• Employee number—Display the number of each employee

• Employee E-mail—Display an E-mail link for each employee

• Employee department—Display the department in which each employee works

• Employee manager—Display the name of employee managers

• Scorecard status—Display the performance status of each employee as evaluated by their primary scorecard.

• Scorecard trend status—Indicate if employee performance has improved, remained the same, or declined.

**Customizing Initiative Status Reports**

Select the initiative data to display or conceal.

<p>| <strong>Table 13</strong> Initiative Report Options |
|-------------------------------|----------------------------------|
| <strong>Option</strong> | <strong>Description</strong> |
| Group by associated object type | Group initiatives of the same type together. |
| Show trend view as default | Display tracking information such as percentage complete and status. |
| Name | Display initiative names |
| Status symbol | Use performance indicators representing initiative status. |
| Start Date | Display when initiatives start. |
| Completion date | Display completion dates. |
| Cost | Display the dollar cost. |
| Creator | Identify the employees who created initiatives. |</p>
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Display the current status, such as “In Progress”.</td>
</tr>
<tr>
<td>Priority</td>
<td>Display initiative priority (1 is the highest).</td>
</tr>
<tr>
<td>Original Due Date</td>
<td>Display the first date by which initiatives were meant to be completed.</td>
</tr>
<tr>
<td>Revised Due Date</td>
<td>Display adjusted completion dates.</td>
</tr>
<tr>
<td>Due Date</td>
<td>Display the date by which initiatives must be completed.</td>
</tr>
<tr>
<td>Percent completed</td>
<td>Display completion status as a percentage.</td>
</tr>
<tr>
<td>Effort</td>
<td>Display the number of work days required.</td>
</tr>
<tr>
<td>Owner</td>
<td>Display the assigned employees.</td>
</tr>
<tr>
<td>Associated to</td>
<td>Display the objects with which the initiative is associated.</td>
</tr>
<tr>
<td>Owner</td>
<td>Displays initiative owners.</td>
</tr>
<tr>
<td>Due Date</td>
<td>Displays the expected completion date.</td>
</tr>
<tr>
<td>Revised Due Date</td>
<td>Displays the last revised due date.</td>
</tr>
</tbody>
</table>

**About Portlet Pages**

You can create portlet pages that provide access to specific Performance Scorecard data, from these industry-standard portals such as Oracle and SAP NetWeaver Enterprise. 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 granular, 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 could 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 create 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.

You can use the following data:

- Presentation views containing this scorecard data:
  - All scorecard components
  - Historic trend data
  - Values and performance chart
  - Annotations and initiatives
- Presentation views containing this measure data:
  - Historic trend data
Using Performance Scorecard Data in Portlets

Build portlet pages in Edit mode to select the application data to display and the fashion in which to render it. You cannot change data in applications from portlet pages.

**Note:** The steps you perform to create portals and portlet pages depends on your portal, and are provided in the *Portal Integration Toolkit Setup Guide*. The following procedure only describes how to access the Performance Scorecard data that you can use on portlet pages.

To create portlet pages:

1. Log in to the portal using the credentials specified during installation and configuration. See the *Portal Integration Toolkit Setup Guide*.
2. Perform these tasks for your portal type as described in *Portal Integration Toolkit Setup Guide*:
   - Create a portal and add the Hyperion portlet.
   - Connect to the Performance Scorecard database.
   - Enable *edit mode* to add content to the portlet page.
3. Navigate the application hierarchy shown below in which data is grouped by type.
   For example, to use accountability element data, select *Accountability Maps*, then *map*, and then *element*.

**Figure 13** Portlet Creation: Select Data Type

<table>
<thead>
<tr>
<th>Look in:</th>
<th>/HPS</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accountability Maps</td>
<td>Folder</td>
</tr>
<tr>
<td>Employee</td>
<td>Folder</td>
</tr>
<tr>
<td>Measure</td>
<td>Folder</td>
</tr>
<tr>
<td>Reports</td>
<td>Folder</td>
</tr>
<tr>
<td>Strategy Trees</td>
<td>Folder</td>
</tr>
</tbody>
</table>

4. To select dimensional measures, select **Measure**, then **measure template**, and then **measure**.
For example, to select the dimensional measure quantifying Employee Satisfaction for North American offices, select Measure, then Employee Satisfaction, then North America, and then office, as shown:

Figure 14 Portlet Creation: Dimensional Measure Selection

Look in: /HPS/Measure/Employee Satisfaction - Sales & Fulfil(Sales)  ▼ Up

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Satisfaction - Sales &amp; Fulfil (North America)</td>
<td>Measure</td>
</tr>
<tr>
<td>Employee Satisfaction - Sales &amp; Fulfil (Latin America)</td>
<td>Measure</td>
</tr>
</tbody>
</table>

5 Select the data to display such as scorecard, and the associated content, such as the status, results, and so on.

For example, in the following figure the portlet page will contain the name, status, and any notes for all components on the scorecard evaluating the performance of the Profitable Growth strategy element.

Figure 15 Portlet Creation: Selecting Content


- Attract and Retain High Quality Employees Scorecard
- Best After Purchase Services Scorecard
- High Quality products, reasonably priced Scorecard
- Increase Customer base Scorecard
- Profitable Growth Scorecard
- Provide New Products to Market Quickly Scorecard

Select the data to display on measure and scorecards presentation views. See:

- “Measure Trending Table” on page 193
- “Measure Chart” on page 193
- “Annotations” on page 193
- “Scorecard Trending Table” on page 194
- “Scorecard Details” on page 194
- “Scorecard Chart” on page 195
Measure Trending Table

Click the calendar icon, in From and To to specify a date range for which to display measure data. Then select display preferences:

- PTD Result—Results calculated by period-to-date formulas or manually entered
- Result—Results collected during the period of time that you specify
- Target—Target value used during the period of time that you specify
- Score—Previous scores achieved during the time that you specify
- Status—Performance levels during the period of time that you specify
- Status as color—Apply the color corresponding to the performance level, such as green for good performance, to the page
- Trend—If performance has improved, declined, or remained the same
- Shown targets—Calculate the score or performance level of the measure using another target

Measure Chart

Click the calendar icon, in From and To to specify a date range for which to graph data. Then select display preferences:

- Display legends—Text describing the measure values graphed
- Chart type—Kind of chart to use
- Row\column layout—Specify how to display multiple charts and graphs
- Display uncollected results—Display indicators or substitute values for unavailable results
- Score—Graph scores
- Result—Graph result values
- PTD result—Graph calculated period-to-date result values
- Targets—Graph target values
- Targets show—Calculate and graph measure score or performance level using another target

Annotations

- Reporting period—The period of time, such as a corporate event or financial quarter for which context-specific annotations and notes exists.
- Show attachments—Link to file attachments
Scorecard Trending Table

Click the calendar icon, in From and To to specify a date range for which to display scorecard data. Then select display preferences:

- Group by perspective—Display scorecard measures by perspective
- Result—Display results
- Target—Target values used to evaluate performance
- Score—Previous scores
- Status—Previous performance levels
- Status as color—Apply the color corresponding to the performance level, such as yellow for acceptable performance, to the page
- Trend—If the performance of the object that the scorecard evaluates, has improved, declined, or remained the same

Scorecard Details

Click the calendar icon, in From and To to specify a date range for which to display scorecard—related data (one year ago-present). Then select display preferences:

- Notes—Link to associated notes
- PTD Result—Measure results calculated by period-to-date formulas or manually entered
- Result—Measure results
- Data confidence—Indicate as a percent or fraction the extent to which missing results impact overall performance.
- Unit—Units quantifying measures, such as hours
- Frequency—Frequency that determines when measure results are collected
- Owners—Employees who own measures
- Target setters—Employees who enter measure target values
- Data collectors—Employees who enter measure results
- Target—Current value of the measure target
- Targets shown—Calculate and display performance using multiple targets that you select. Represent performance levels using scores or status symbols
- Target score—Score based on the report target
- Score—Scorecard or measure scores
- Status—Current performance level
- Weight—Percent indicating how much scorecard components are used to evaluate performance
- Show scores—Scores for the perspectives that group measures on the Perspective Chart
- Weighted score—Indicates the extent to which perspective scores impact performance (on Perspective Chart)
- Status as color—Apply the color corresponding to the performance level, such as green for good performance, to the page
- Trend—Indicate if the performance of the object that the scorecard evaluates has improved, declined, or remained the same

**Scorecard Chart**

Click the calendar icon, ☀️, in From and To to specify a date range for which to graph data. Then select display preferences:

- Legends—Text that identifies each kind of data graphed
- Short perspective name—Use abbreviated perspective names
- Scale x y axis—Automatically adjust axis sizing to accommodate data
- Row\column layout—Specify how to display multiple charts and graphs
- Chart type—The kind of graphs to use
- Scores—Raw scores of perspectives on the Perspective Chart
- Show weighted scores—Scores of perspectives based on the weighting of the measures that they group.
- Result—Graph all measure result values in a Radar Chart
- Normalize results—Display scorecard components as adding to 100% while maintaining their relative individual weights. This scales measures so that they fit on the Radar Chart.
- Target—Graph target values
- Comparator—Calculate and graph values using a different reporting target
Restricted Dimensions, Members, and Alias Characters

In This Appendix

General Restrictions ..................................................................................... 197
Characters and Spacing................................................................................. 197

General Restrictions

Follow these rules when you name a dimension, member, or alias:

- Use no more than 80 characters when naming Unicode-mode dimensions, members, or aliases.
- Do not use quotation marks (" "), brackets ([ ]), or tabs.
- Do not use function names or function arguments.
- Do not use the names of other dimensions, members, generation names, level names, and aliases.

Characters and Spacing

Do not use the following characters in dimension, member, or alias names.

<table>
<thead>
<tr>
<th>Character</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>@</td>
<td>at signs</td>
</tr>
<tr>
<td>\</td>
<td>backslashes</td>
</tr>
<tr>
<td>{}</td>
<td>braces</td>
</tr>
<tr>
<td>,</td>
<td>commas</td>
</tr>
<tr>
<td>-</td>
<td>dashes, hyphens, or minus</td>
</tr>
<tr>
<td>=</td>
<td>equal signs</td>
</tr>
<tr>
<td>&lt;</td>
<td>less than signs</td>
</tr>
<tr>
<td>()</td>
<td>parentheses</td>
</tr>
<tr>
<td>.</td>
<td>periods</td>
</tr>
<tr>
<td>Character</td>
<td>Name</td>
</tr>
<tr>
<td>-----------</td>
<td>-----------</td>
</tr>
<tr>
<td>+</td>
<td>plus signs</td>
</tr>
<tr>
<td>_</td>
<td>underscores</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Do not use spaces at the beginning or end of a name.
Creating Complex Formulas

The Formula Editor

The formula editor enables you to create advanced formulas for measures, dimensional measures, and ranges for performance indicators that evaluate scorecard and measure performance. Use the formula editor to perform these tasks:

- Define advanced result, score, target, and period-to-date formulas.
  
  Advanced formulas involve calculations that use the values of other objects. See “Working with Measure Formulas” on page 199.

- Use formulas in the ranges attached to performance indicators that represent measure and scorecard performance. Click the formula setup button, $f$, on the Subrange Setup box to use the formula editor.
  
  See “Working with Performance Indicators” on page 200.

Working with Measure Formulas

Use the formula editor to perform these tasks:

- Create formulas that use the values of other objects such as targets and scorecards.
  
  Use functions to indicate the kind of object and values to use. You can specify the date on which the values to use were generated. You can also insert placeholders for values that are generated in the future.

- Update the formulas of dimensional measures if the template that generated the measures was modified.

- Apply an operation such as $\text{SUM}$ or $\text{MAX}$ to all item on a scorecard.
Working with Performance Indicators

Use the formula editor to create formulas for the performance indicators that assess and represent levels of measure performance. For example, if performance depends on the results or scores of other measures, you can define how these other measure values are used.

Use this in formulas to reference the current measure or scorecard for which the performance indicators are used.

Layout and Components

The following figure identifies the components of the formula editor.

![Formula Editor](image)

You will use these frames and tools to create formulas:

1. Left-hand formula frame: Use to insert functions and enter data. See “The Formula Frame” on page 201.
2. Right-hand function frame: Contains the functions that you use to define formulas. See “Function Folder” on page 201.
3. Function folders in the function frame: Group functions by type, such as mathematical and statistical. The Application Data folder contains functions that enable you to insert different kinds of application data such as measure results and scorecard scores. See “Application Data Folder” on page 201.

See:

- “Mathematical and Comparison Operations” on page 202
- “Conditional Operations” on page 202
The Formula Frame

Create formulas by placing functions and object values in the formula frame. You can insert a function in three ways:

- Dragging the function from the Function frame to the Formula frame
- Double-clicking the function in the Function frame
- Right-clicking in the Formula frame

After inserting a function, specify the data to use. Data that you must enter is represented by these place holders:

- **Value**: Used in mathematical functions such as SQRT
- **Arg**: Use to specify the kind of data to use, such as scorecard.
- **Attribute**: Use to apply a function to, or insert a value of, the following:
  - Dimensional data
  - All the measures on a scorecard
  - All the scorecards on a scorecard

Function Folder

The Function folder contains the functions that you can use to perform calculations. It also contains functions that insert values for objects such as measures, scorecards, and variables.

There are four kinds of functions:

- **Mathematical**—Provides functions that you can use to perform tasks such as inserting the square root of a value or rounding a value down. See “Mathematical Functions” on page 205.
- **Statistical**—Provides functions that enable you perform tasks such as add object values such as measures results, find the average value generated by objects, such as finding an average scorecard score. See “Statistical Functions” on page 206.
- **Logical**—Provides functions that you can use to specify conditions in a formula or specify values to use if object values are unavailable. See “IF Statements” on page 210.
- **Time**—Provides functions that enable you to use current or previously generated object values. This function also provides functions that you can use to have Performance Scorecard insert values that will be generated in the future. See “Time-Related Functions” on page 212.

Application Data Folder

The application data folder provides functions that enable you to perform calculations using the values of other objects, including:

- Measure results, scores, targets, and variances
- Targets (comparators)
• Variable results
• Scorecard scores

Use this with these function to reference the current measure or scorecard.

The Dimensional Data folder contains functions that let you perform calculations using multiple objects, such as all measures on a scorecard.

See “Using Application Data” on page 215.

Mathematical and Comparison Operations

You can use these operation buttons:

<table>
<thead>
<tr>
<th>Table 14 Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operator</strong></td>
</tr>
<tr>
<td>^</td>
</tr>
<tr>
<td>%</td>
</tr>
<tr>
<td>&gt;</td>
</tr>
<tr>
<td>&gt;=</td>
</tr>
<tr>
<td>&lt;=</td>
</tr>
<tr>
<td>==</td>
</tr>
<tr>
<td>!=</td>
</tr>
</tbody>
</table>

Conditional Operations

You can use these buttons to specify the data to use if certain criteria or conditions are met. You will probably use these buttons in an IF statement that identifies the criteria that, if met, causes a certain outcome. See “IF Statements” on page 210.

• And button, & &—Inserts an AND statement that enables you to specify multiple conditions that must exist before an outcome occurs. For example, in a composite measure that reflects customer satisfaction, measures for support calls and client references could be used. Specify that high customer satisfaction exists only if there are less than 20 support calls and more than 40 references as follows:IF (mResult (“support calls”) < 20) & & mResult (“references”) > 40
• Or button, —Inserts an OR statement that enables you to specify that one of multiple conditions must exist before something else can happen. For example, in a composite measure that monitors effective product testing, you could use measures that track defects logged by clients and the number of calls to technical support. You can specify that a good level of product testing exists if one of these is true:
  ○ Less than 100 defects are submitted by clients
  ○ Less than 1000 calls are made to technical support

You could define this in a formula as follows: IF mResult("client defects") < 100 || mScore("support calls") < 1000)

• Not button, —Inserts a NOT statement that enables you to specify conditions that are not true or that should not happen

Syntax and Conventions

After inserting an operation or function, specify the data or object values to use. These values are represented by placeholders. The placeholders used depend on the function you inserted. See “Placeholders” on page 203.

Follow these conventions with functions:

• Place the name of the objects whose values you use in quotation marks (""). For example, this formula inserts the current score of the Sales scorecard: sScorecard("Sales")

• Place functions that insert values for other objects between brackets ( ).

• Insert two close brackets ), after object names.

Tip: Colored brackets help you ensure that a formula contains the correct number of close brackets. A formula must contains two of each colored bracket.

Placeholders

Placeholders indicate the kind of data that you must provide to perform calculations. Based on the function, replace these placeholders with the values to use:

• Value: See “Value” on page 204

• Arg: See “Arg” on page 204

• Attribute: See “Attribute” on page 204

• Time intervals such as weeks and years
Value
A value placeholder represent the number to use in a calculation.
For example, to find the square root of 250, perform these tasks:
1. Double-click the SQRT function.
2. Replace value with 250.SQRT(250).

Arg
An arg placeholder represents the following:
- An object, such as scorecard or measure
- The kind of object value, such as result or score
For example, to find the average result collected by two measures, perform these tasks:
1. Double-click Average.
2. Indicate that you want to use results, by placing the cursor after average and double-clicking mResult:
   average(mResult(arg1, arg2))
3. Place the cursor before arg1, right-click, and select the first measure from the box that is displayed.
4. Delete arg2, add a closed bracket to NetProfit, and insert a comma:
   average(mResult("NetProfit")).
5. Insert average and mResult.
6. Right-click for the second mResult and select the other measure.
7. Insert a closed bracket, ) after the second measure.
   average(mResult("NetProfit"),mResult("NetProfit"))
8. Delete any remaining placeholders.

Attribute
An attribute placeholder represents one of these objects:
- All dimensional measures generated by a template that was modified
- All lower-level scorecard on a scorecard

Inserting Functions
This topic describes how to use these kinds of functions and options:
- “Mathematical Functions” on page 205
Mathematical Functions

This topic describes how to use these mathematical functions:

- **ABS**
- **INT**
- **LOG and LOG10**
- **SQRT**

**ABS**

Use ABS to insert the absolute value of a number that you specify.

This function uses this syntax, in which you replace `value` with the number to use:

\[
\text{ABS}(\text{value})
\]

For example:

\[
\text{ABS}(-4) = 4
\]

For example, \(\text{ABS}(-4) = 4\)

To insert this function:

1. Select **Functions**, then **Mathematical**.
2. Double-click **ABS**.
3. Replace `value` with the number to use.

**INT**

Use INT to round up numbers with decimal values higher than five using this syntax:

\[
\text{INT}(\text{value})
\]

For example:

\[
\text{INT}(21.8) = 22
\]
\[
\text{INT}(12.4) = 12
\]

To use this function:

1. Select **Functions**, then **Mathematical**.
2  Double-click INT.
3  Replace value with the number to use.

**LOG and LOG10**

Use LOG to insert the logarithm of the value for a base. This enables you to represent very high values using a smaller frame of reference. For example, LOG is used to assess seismic activity such as earthquakes.

LOG uses this syntax: LOG(value, base)). For example, LOG(4, 100,000))= 0.12

Use LOG10 to insert the base-10 logarithm of a number that you specify. This function uses this syntax:

For example, LOG10(86)=1.93449

➢ To use this function:
1  Select Functions, then Mathematical.
2  Double-click LOG or LOG10.
3  Replace value and base with the numbers to use.

**SQRT**

Use SQRT to insert the positive square root of a number. This function uses this syntax, in which you replace value with the number:

SQRT(value)

For example, SQRT(16)=4

➢ To insert this function:
1  Select Functions, then Mathematical.
2  Double-click SQRT.
3  Replace value with the number to use.

**Statistical Functions**

This section explains how to use these statistical functions:

- Average
- COUNT
- MIN
- MAX
- MEDIAN
- PERCENTILE
Note: If you use Ignore Missing Values in formulas and score calculations preference, measures without results are not included in formulas that contain these functions. See “Using Uncollected or Unavailable Data” on page 108.

Average

Use Average to insert the average of multiple values, such as the average score of multiple scorecards. This function has this syntax in which arg1.. represents the functions and objects to use:

\[
\text{Average}(\text{arg1}, \text{arg2}...) 
\]

For example, \(\text{Average(sScore(development cost), sScore(overhead), sScore(cost of sales)})\) inserts the average score of the three scorecards specified.

To insert this function:

1. Select Functions, then Statistical, and double-click Average.
   
   This inserts \(\text{Average}(\text{arg1}, \text{arg2}...)\)
2. Replace arg1 with the function that retrieves the data to use after the first bracket.
3. Right-click and select the object whose values to use.
4. Insert a comma and repeat steps 3-5 to identify the objects whose values to use in the calculation.

COUNT

Use COUNT to insert the number of items on a scorecard. This function using this syntax, in which \(\text{arg}\) represents the functions and objects to use:

\[
\text{COUNT}(\text{arg1}, \text{arg2}...) 
\]

For example, \(\text{COUNT(onScorecardMeasures("netprofit"))}\) identifies how many measures are on the Net Profit scorecard.

To use this function:

1. Select Functions, then Statistical, and double-click COUNT.
   
   This inserts \(\text{COUNT}(\text{arg1}, \text{arg2}...)\)
2. Delete arg1.
3. Select Application, then Scorecard, and double-click ScorecardMeasures.
4. Select the scorecard to use from the box that is displayed.
5. Repeat these steps to insert missing arguments.
**MIN**

Use MIN to insert the lowest value in a group of objects, such as a group of measures. This function has this syntax, in which arg1, arg2 represent the objects to use:

\[
\text{MIN}(\text{arg1, arg2...})
\]

For example, assume these measure results:

- The measure whose formula you are creating (represented by this): 35,000
- Car Sales=40,000
- Truck Sales=21,000

The formula inserts 21,000 since Truck Sales has the lowest result value.

To insert this function:

1. Select **Functions**, then **Statistical**, and double-click **MIN**.
   
   This inserts \(\text{MIN}(\text{arg1, arg2...})\)

2. Delete arg1 and insert the function that retrieves the values to use.
   
   For example, to find the lowest score achieved by a scorecard, insert \(s\text{Score}\).

3. Select the object to use from the box.

4. Repeat steps 2 and 3 to define subsequent arguments.

**MAX**

Use MAX to insert the highest value in a group of objects, such as a group of measures. This function uses this syntax, in which arg1... represent the function that retrieves the values of the objects to use:

\[
\text{MAX}(\text{arg1, arg2...})
\]

Assume these measure results:

- The measure whose formula you are creating (represented by this): 766
- Car Sales=9000
- Truck Sales=11000

This formula inserts 1100 since Truck Sales has the highest result value:

\[
\text{MAX}(\text{mResult}(\text{this}), \text{mResult}(\text{"Car sales"}), \text{mResult}(\text{"Truck sales"}))
\]

To use this function:

1. Select **Functions**, then **Statistical** and double-click **MAX**.
   
   This inserts \(\text{MAX}(\text{arg1, arg2...})\)

2. Delete arg1 and insert the function that retrieves the values to use.
   
   For example, to find the highest result collected by a measure, insert \(\text{mResult}\).
3 Select the object to use from the box that is displayed.
4 Repeat steps 2 and 3 to specify the remaining arguments.

**MEDIAN**

Use MEDIAN to insert the value would be in the middle of a group of values. For example, the median of these values is 80 which is the average of the two center values (70 and 90):

- 60
- 70
- 90
- 100

This function uses the following syntax. `Arg1...` represents the function that retrieves the kind of values to use and the object whose values to use:

- `MEDIAN(arg1, arg2...)`

To use this function:

1 Select **Functions**, then **Statistical**, and double-click **MEDIAN**.
   This inserts `MEDIAN(arg1, arg2...)`
2 Delete `arg1` and insert the function that retrieves the values to use.
   For example, to find the highest target defined for a measure, insert `mTarget`.
3 Select the object to use from the box that is displayed.
4 Repeat steps 2 and 3 to specify the remaining arguments.

**PERCENTILE**

Use PERCENTILE to identify a value that represents x% of a group of values. For example, you can use this function to grant bonuses only to employees with scorecard scores in the 60% percentile. This means that 60% of employees score below this level. PERCENTILE identifies the scorecard score that employees must have to receive a bonus.

PERCENTILE has following syntax. `V1` represents the kind of values you are using, such as scores or results. `K` represents the percentage to use.

- `PERCENTILE(v1, v2, v3, k)`

For example, `PERCENTILE(onScorecardMeasures(score, “scorecard”),75%)` inserts the value for which 75% of all scores are below.

To use this function:

1 Select **Functions**, then **Statistical**, and double-click **PERCENTILE**.
   This inserts `PERCENTILE(v1,v2...,k)`
2 Place the cursor after the first bracket.
3 Replace v1, v2...with the function that inserts the kind of values to use.
   For example, to use the scorecard’s score, insert the sScore function.
4 Select the object whose values to use from the box that is displayed.
5 Repeat steps 3-4 to insert all the object values to use.
6 Replace k with the percentage to use.
   For example, \texttt{PERCENTILE(onScorecardMeasures(result, \textquote{scorecard name}), \%80)}

\textbf{SUM}

Use \texttt{SUM} to add the values of a group of objects. This function has this syntax, in which you replace arg1, arg2 with the objects to use:
\begin{quote}
\texttt{SUM(arg1, arg2...)}
\end{quote}

For example, assume these scorecard scores:
\begin{itemize}
\item Net Sales = 340
\item Net Profit= 20,000,000
\end{itemize}

\texttt{SUM(sScore("Net Sales"), sScore("NetProfit"))} adds the two scores and inserts 20,000,340.

\begin{itemize}
\item \textbf{To use this function:}
\item 1 Select Functions, then Statistical, and double-click \texttt{SUM}.
   This inserts \texttt{SUM(arg1, arg2...)}
\item 2 Replace arg1 with the function that inserts the object whose values you want to use.
   For example, to add the results of a measure, insert \texttt{mResult}.
\item 3 Select the object to use from the box that is displayed.
\item 4 Repeat steps 2 and 3 to specify the remaining arguments.
\end{itemize}

\textbf{IF Statements}

These topics explain when and how to use IF statements:
\begin{itemize}
\item \texttt{\textquote{When to use IF Statements}} on page 211
\item \texttt{\textquote{Syntax and Placeholders}} on page 211
\item \texttt{\textquote{Inserting IF Statements}} on page 211
\end{itemize}
When to use IF Statements

IF statement enable you to define criteria that must be exist for another event to occur. Use an IF statement to identify the values to use, or the calculations to perform, in a particular situation.

For example, assume that a scorecard uses ten measures of equal weight. Eight measures score 90% and two score 5%. To prevent the scorecard score from being too low, use IF to calculate and use a different score. For example, you could state that 50% replaces the score for each measure if the measure’s actual score is less than 25%.

You can also use IF to specify the data to use instead if results for a measure used in other formulas are unavailable. In this situation, you could use IF to insert the most recent result collected by the measure.

Syntax and Placeholders

An IF statement has this syntax: IF(condition, then, else). These placeholders are used:

- THEN — Represents the outcome if the CONDITION is true. This could be the use of a different value or calculation.
- CONDITION — Represents criteria that must be true for an outcome to occur. If the condition is true, the outcome you define for THEN is used. You can use multiple conditions. If the condition is false, the outcome you define for ELSE is used
- ELSE — Represents another outcome to use if the outcome you define for THEN is false.

After you specify a condition, perform these tasks:

- Ensure that the condition ends with a comma (,).
- Press ENTER to insert an empty line.
- Indent the next line of code in which you specify the outcome to use if the condition is true (THEN placeholder).

Inserting IF Statements

This section describes how to create an IF statement. You can use operators to define multiple conditions or identify outcomes that must never occur:

- To define one condition out of many that must be met, click the must occur button, .
- To define a condition that cannot occur, click the must never occur button, .

Review the information that you must specify to create an IF statement. See “Syntax and Placeholders” on page 211.

To insert an IF statement:

1. Select Functions, then Logical, and double-click IF.

   This inserts IF(condition, then, else)
Place the cursor after the open bracket and replace `condition` with the function that retrieves the values to use.

For example, if the condition involves scorecard scores, insert `sScore`

Select the object whose values you want to use from the box that is displayed.

Press ENTER to insert an empty line.

Optional: Define another condition and press ENTER.

Indent the cursor and replace `then` with the value or function to use if the condition(s) are true.

Press ENTER to insert an empty line.

Indent the cursor and replace `else` with the function or value to use if the THEN outcome is false.

### Creating Formulas With Nested IF Statements

Use this syntax, ensuring that there are three brackets at the end of the formula:

```plaintext
If((mTarget(this) == 0.0), mResult(this), (mResult(this) / mTarget(this)))
```

This formula determines that if the target for the measure is 0 then the score is the result value. If the target value is not 0 then the score is the result divided by the target.

### Using `isNoValue`

Use `isNoValue` to determine if a portion of a formula contains missing values. Missing values are represented by a double dash (`--`). Use `isNoValue` with an IF statement to identify the data or an outcome to use if values are missing.

You can use `isNoValue` in two ways:

- To ensure that values exist for other objects in a formula: Select a portion of the formula. Select `Functions`, then `Logical`, and double-click `IsNoValue`. If `isNoValue` is false, then values exist for the objects that you use and the formula is valid. If `isNoValue` is true, then all values do not exist for the objects that you use and the formula is not valid.

- To substitute another value for a missing value: Use an IF statement to specify the data to use when other values are unavailable. For example, to use 50 for a scorecard score if the score is unavailable, you could use this formula: `IF(isNoValue(sScore(scorecard)), 50, sScore ("scorecard")).`

See “IF Statements” on page 210.

### Time-Related Functions

You can perform calculations using existing values or values that will be generated in the future using these functions:

- `ValuesToDate`: Insert to use all the values that an object has generated.
You cannot use `ValuesToDate` in calculations using application data such as results and scores.

- `timeOffset`: Insert to use old values, current values, or values that will be generated in a formula.

You can indicate the period of time during which values were, or will be, generated using a `time interval`, such as a week or month.

`valuesToDate`

Use `valuesToDate` to perform statistical operations on the result and score generated by an object during a particular period of time. For example, use this function to insert the highest score a measure achieved in the past six months.

You can use `valuesToDate` with the following:

- MIN and MAX
- SUM and COUNT
- Avg and MEDIAN
- PERCENTILE

To use `valuesToDate`:

1. Select Functions, then Time, and then double-click `valuesToDate`.
2. Select the measure whose values to use from the box that is displayed. To use the current measure, select This measure.

   This inserts: `valuesToDate(attribute, "measure", period)`

3. Replace `attribute` with a function that retrieves the kind of value to use.

   For example, to use the scores of a measure on a scorecard, enter `onScorecardMeasures` and select the scorecard from the box that is displayed.

   **Tip:** To calculate values using a target other than the Report Target, right-click and select Insert Target.

4. Replace `period` with one of these intervals that represents the time after which values were available:

   - day—Use if the object began generating values yesterday.
   - week—Use if the object began generating values 7 days ago.
   - month—Use if the object began generating values 4 weeks ago.
   - half-year—Use if the object began generating values six months ago.
   - year — Use if the object began generating values a year ago.
For example, to insert the highest score a measure on a scorecard has achieved this year, enter:
valuesToDate(MAX(onScorecardMeasures,"Scorecardname",year))

**mPTDResults**

Use a `mPTDResult` function to perform calculations using PTD results and to reference PTD results in the formulas for other business objects.

**Note:** PTD results entered from reports override those you calculate using formulas. `mPTDResult` always takes the value of the most recent PTD result entered from a report.

To use `mPTDResults`:

1. Select **Functions**, then **Measures**, and double-click **mPTDResults**.
2. Select the measure or dimensional measure from the box that is displayed, and click **OK**.
   
   This inserts `mPTDResult("Measure")`
3. Insert the appropriate function to perform calculations using the result value.

**timeOffset**

Use `timeOffset` to perform calculations using current or previously-generated values. You can also use this function to update a formula with values generated in the future.

You can insert previously-generated values in two ways:

- Using the date on which the values were generated
- Specifying the interval of time (month or year for example) that has elapsed

To use `timeOffset`:

1. Select **Functions**, then **Time**, and double-click **timeOffset**.
   
   This inserts: `timeOffset(subformula, - #d,w,y,m,p) or dd/mm/yy`
2. Replace `subformula` with the function that inserts the object whose value to use.
   
   For example, `timeOffset(mScore("InternalCosts"))` retrieves the score of the InternalCosts measure.
3. Perform a task:
   - To insert the current or a previously-generated value: Replace # with the number of intervals, such as months, that have elapsed since the value was generated.
   - To insert a value that has not yet been generated once it is generated: Replace - with a plus sign (+). Replace # with the number of intervals, such as weeks, after which the value will be generated with a plus sign (+).
4. Specify a time interval using `TimeOffset` depending on if you know the date on which the value was, or will be, generated as follows:
If you do not know the date on which the value was, or will be, generated use `timeOffset(subformula, # - (interval))`, with one of these variables:

- d—Insert a value that was generated `x` days ago, or that will be generated in `x` days
- w—Insert a value generated `x` weeks ago, or that will be generated in `x` weeks
- y—Insert a value generated `x` years ago, or that will be generated in `x` years
- m—Insert a value generated `x` months ago, or that will be generated in `x` months
- q—Insert a value generated `x` quarters ago, or that will be generated in `x` quarters
- p—Insert a value generated `x` periods ago, or that will be generated in `x` periods

For example, to insert a measure result that was collected six weeks ago, enter:

```
timeOffset(mResult("measure"), -6 w)
```

Use if you know the date on which the value was, or will be, generated, use `timeOffset(subformula, # dd/MM/yy)` replaced `dd/mm/yy` with the day, month, and last two digits of year on which the measure was or will be generated. For example, to insert the score that a scorecard generates on a December 1, 2007, enter `timeOffset(sScore("scorecard"), 01/12/07)`

### Using Application Data

This topic explains how to use the values of these objects in formulas:

- “Using Measures” on page 215
- “Using Scorecards” on page 219
- “Using Variables” on page 220
- “Using Dimensional Measures” on page 221

### Using Measures

The section describes how to use the following measure function. Use this with result, score, and target functions to reference the current measure or scorecard.

- Results: See “mResult” on page 216 and “mPTDResults” on page 216.
- Scores: See “mScore” on page 216
- Targets: See “mTarget” on page 217
- Sub targets for multivalue targets: See “mSubTarget” on page 218
- Other targets: See “mComparator” on page 217
- Variances: See “mVariance” on page 218

It also describes how to perform calculations using all measures on a scorecard. See “onScorecardMeasures” on page 219.
**mResult**

Use `mResult` to perform calculations using a measure result. You can also use this function to:

- Insert a previously collected result using `timeOffset`
- Insert a result that will be collected using `timeOffset`
- Perform operations, such as finding the average value of all the results a measure has collected
- Perform a mathematical, statistical, and logical function on a measure result. See “Inserting Functions” on page 204.

To use `mResult`:

1. Select **Application Data**, then **Measures**, and double-click **mResult**.
2. Select the measure to use. To use the result of the current measure, select **This Measure**.

For example, this formula inserts the current result collected by the `NetProfit` measure:

```
mResult("NetProfit")
```

To use previously collected measure results, enter:

```
timeOffset(mResult("measure name"),-interval)
```

**mPTDResults**

If you are a result collector, `mPTDResult` enables you to perform calculations using PTD results and to reference PTD results in the formulas for other business objects. PTD results entered from reports override those you calculate using formulas. `mPTDResult` always takes the value of the most recent PTD result entered from a report.

To use `mPTDResults`:

1. Select **Functions**, then **Measures**, and double-click **mPTDResults**.
2. Select the measure or dimensional measure from the box that is displayed, and click **OK**.

   This inserts:
   
   `mPTDResult("Measure")`

3. Insert the appropriate function to perform calculations using the result value.

**mScore**

Use `mScore` to perform calculations using the score of a measure that you specify.

To use `mScore`:

1. Select **Application Data**, then **Measures**, and double-click **mScore**.
2. Select the measure to use. To use the current measure, select **This Measure**.

   For example, this formula inserts the current score of the `Revenue` measure:

   `mScore("Revenue")`
To insert a previous score, enter `timeOffset(mScore("measure name"), -interval))`.

**mTarget**

Use `mTarget` to perform calculations using the target for a measure that you select. If you select a multivalue target from the Report Target list on the toolbar, `mTarget` uses the value of the first subtarget in the order you defined reating the multivalue target. For example, for this multivalue target, the Maximum subtarget is used as it is first in the order.

![Sample Multivalue Target Subtarget Order](image)

See “Creating Multivalue Targets” on page 79

To use `mTarget`:

1. Select *Application Data*, then *Measures*, and double-click `mTarget`.
2. Select the measure to use from the Select Measure box. To use the current measure, select *This Measure*.

   For example, this formula insets the current target for the Total Sales measure:

   `mTarget("TotalSales")`

   To use this function with other functions to perform calculations using previous targets, enter `timeOffset(mTarget("measure name"), -interval))`.

**mComparator**

Use `mComparator` to perform calculations as follows:

- Using a target other than that selected from the Report Target list, that you specify by name. For example, if you have targets for financial quarters called Q1, Q2, Q3, and Q4, and Q2 is the Report Target, use `mComparator` to insert values for Q1 or Q4 in a formula. If the target you select is multivalue, the subtarget highest in the order is used.
Using a target and a corresponding subtarget that you specify by name, regardless of the order of the subtarget. For example, you could insert the value for the Minimum subtarget although it is last in the defined order.

As such, `mComparator` essentially enables you to perform calculations using a particular target regardless of the selected Report Target or, for multivalue targets, the order of a subtarget.

To use `mComparator`:

1. Select Application Data, then Measures, and double-click `mComparator`.
2. Select the measure to use. To use the current measure, select `This Measure`.
3. Click `OK`.
4. Select the target to use from the Select Target box that is displayed.
5. Click `OK`.
6. Insert the functions and calculations to perform.

For example, to insert the value for a target called ShortTerm, you would use this formula: `mComparator(this, "ShortTerm")`

`mSubTarget`

Use `mSubTarget` to identify a subtarget by name, such as maximum. If a report target is chosen that is multivalue and has a subtarget called maximum, the value for maximum is used regardless of the subtarget order. If the report target is not multivalue, or is multivalue but does not have a subtarget called Maximum, then the highest order subtarget is used.

To use `mSubTarget`:

1. Select Application Data, then Measures, and then double-click `mSubTarget`.
2. Select the measure to use from the Select Measure box. To use the current measure, select `This Measure`.
3. Select the name of the sub target to use and click `OK`.

`mVariance`

Use `mVariance` to insert the difference between the result a measure collected and its target. This enables you to compare actual, against anticipated, performance.

To use `mVariance`:

1. Select Application Data, then Measures, and double-click `mVariance`.
2. Select the measure to use. To insert the current measure, select `This Measure`.

This inserts: `mVariance("measure")`
onScorecardMeasures

Use onScorecardMeasures to perform calculations using measures on an employee, strategy element, or accountability element scorecard.

For example, to identify the measure with the highest score on the ProductSales scorecard, you would enter: \( \text{MAX(onScorecardMeasures(score, "ProductSales"))} \).

To use onScorecardMeasures:

1. Select Application Data, then Measures, and double-click onScorecardMeasures.
2. Select the scorecard on which the measure is used from the Select Scorecard box.
3. Replace attribute with the kind of measure value, such as a result, to use.
   
   For example: \( \text{onScorecardMeasures(result, "EuropeanSales")} \).
4. Place your cursor before onScorecardMeasures and insert the operation to perform, followed by an open bracket.
   
   \( \text{MAX(onScorecardMeasures(result, "EuropeanSales")} \)
5. For example to use the highest result achieved by a measure on the scorecard, you would enter:
   
   \( \text{MAX(onScorecardMeasures(result, "EuropeanSales")} \)
6. Insert a close bracket at the end of the formula.
   
   \( \text{MAX(onScorecardMeasures(result, "EuropeanSales")}) \)

Using Scorecards

These topics explain how to use scorecard data in formulas:

- “sScore” on page 219
- “onScorecardScorecards” on page 220

sScore

Use sScore to perform calculations using the score of a scorecard that you specify. You can use the score of an employee, strategy element, or accountability element scorecard.

Use this in formulas using this function to reference the current scorecard.

To use sScore:

1. Select Application Data, then Scorecards, and double-click sScore.
2. Select the scorecard as follows:
   - Employee scorecard: Expand Employee and click the employee
   - Strategy or accountability element scorecard: Expand the appropriate Map folder and navigate the map structure to select the element.

   For example, to insert the score of an employee called Ted Burns, enter:
To use a previous score, enter: `timeOffset(sScore("name"), - intervals))`. For example, to insert the score Ted achieved one year ago, enter: `timeOffset(sScore("TedBurns"), -1y)`

### onScorecardScorecards

Use `onScorecardScorecards` to:

- Insert the scores of all lower-level scorecards on a scorecard
- Apply changes to all lower-level scorecards on a scorecard
- Perform operations on all lower-level scorecards on a scorecard

**Tip:** You can use this in formulas using this function to reference the current scorecard.

To use `onScorecardScorecards`:

1. Select Application Data, then Scorecards, and double-click `onScorecardScorecards`.
2. Select the scorecard.
   
   A sample scorecard for a strategic objective, Decreased Costs, is used.
   
   `onScorecardScorecards("Decreased Costs")`
3. Place the cursor before `onScorecardScorecards`, insert the operation or function, and insert an open bracket.

   For example, to use the average score achieved last year of all the scorecards on the Decreased Costs scorecard, you would enter:

   `timeOffset(Average(onScorecardScorecards("Decreased Costs")), -1y)`

### Using Variables

Use `vResult` to perform calculations using a variable.

To use `vResult`:

1. Select Application Data, then Measures, and double-click `vResult`.
2. Select the variable to use.

   For example, to insert the current value of the American dollar, you would enter:

   `vResult("US Dollar")`
Using Dimensional Measures

Use `dimensionalMeasure` to perform calculations using a single dimensional measure. See “`dimensionalMeasure`” on page 221.

Use `dimensionalChildren` to perform calculations using the values of dimensional measures and their children. For example, a calculation you perform using the ItalianOffices measure in this dimension outline, is also applied to the Florence, Venice, and Rome child measures.

- European Offices
  - Italian Offices
    - Florence (child)
    - Rome
    - Venice

NOTE:

Data for child dimensions may be omitted from the Trending Table on reports if you aggregate results using this function in result formulas. For example, assume this dimensional outline:

- APAC
  - Australia
    - Sydney
  - Korea
    - Seoul

Assume that you specify the following as the APAC measure result formula, in which Region is the name of the measure template: `SUM(dimensionalMeasure(result, "Region", ["Australia", "Korea"]))`

Because you cannot specify multiple child nodes in the same dimension in formulas, resolve this issue by adding the SUM of each node as follows:

```
SUM(dimensionalMeasure(result, "Region", ["Australia"])) +
SUM(dimensionalMeasure(result, "Region", ["Korea"]))
```

See “About Using `dimensionalChildren`” on page 222.

dimensionalMeasure

Use `dimensionalMeasure` to perform calculations using the values of one dimensional measure or child measures in an outline. For example, you could use this function to perform calculations using only data for the Venice measure in this outline:

- Italian Sales Offices
  - Florence
  - Rome
To use `dimensionalMeasure`:

1. Ensure that you are modifying the template that generates the dimensional measure to use.
2. Select Application Data, then Dimensional Data, and double-click `dimensionalMeasure`.
3. Select the template that generates the dimensional measures to use from the Select Template box.

   This inserts: `dimensionalMeasure(attribute, "template", ["dimensional member1", "dimensional member2"...])`

4. Replace `attribute` with the kind of value, such as score, to use.
5. Replace `dimensional member1` and `dimensional member2` with the names of the dimensions used to generate the dimensional measure to use.

   Note: If the measure is generated using only one dimension, delete the `dimensional member2` placeholder. If the measure is generated using more than two dimensions, specify each dimension.
6. Place the cursor before `dimensionalMeasure` and insert the operation or function to perform.

   For example, this formula finds the highest product revenue result gathered by the Venice dimensional measure:

   \[
   \text{MAX(dimensionalMeasure(result, "Revenue", ["Venice", "Products"]))}
   \]

### About Using `dimensionalChildren`

Use `dimensionalChildren` to perform a calculation, or use the values of all child measures belonging to a higher-level dimensional measure.

`dimensionalChildren` has this syntax:

\[
\text{dimensionalChildren(attribute, "template", ["dimension1", "dimension2"...]})
\]

Replace the placeholders with this information:

- **Attribute**: Specify the kind of measure value, such as result, to use.
- **Template**: Specify the name of the template that generates the dimensional measures you want to use.
- **Dimension1**: Specify the name of each dimension that generates the dimensional measures to use.

For example, assume an organization has sales offices in Europe and North America. The number of sales (Revenue) each office makes is tracked using a Revenue template, a Product dimension, and an Office dimension. To identify the office that makes the largest number of sales, you could use this formula:

\[
\text{MAX(dimensionalChildren(result, "Revenue", [Office", "Products"])})
\]
Using `dimensionalChildren`

To use `dimensionalChildren`:

1. Ensure that you are modifying the template that generates the dimensional measures to use.
2. Select **Application Data**, then **Dimensional Data**, and double-click “`dimensionalChildren`”.
3. Select the template that generates the dimensional measures to use from the Select Template box.

   This inserts: `dimensionalChildren(attribute, “template”, [
   “dimension1,” “dimension2”...])`

4. Replace `attribute` with the value, such as `score`, to use.
5. Replace `dimension1` and `dimension2` with the names of the measures to use, and whose children to use.
6. Place the cursor before `dimensionalChildren` and insert the operation or function to perform.

   For example, this formula uses the average score of the dimensional measures and their children to track the revenue of each Italian office:

   ```
   Average(dimensionalChildren(score, Revenue, [Italy, Products]))
   ```

Validating Formulas

You can perform two levels of validation to identify and resolve formula errors:

- To validate the formula of an open measure or performance indicator, select the formula and click Validate. See “Resolving Common Errors” on page 223.
- To validate the formulas of all measures and performance indicators, use the Formula Error Report. See “Validating all Formulas” on page 224.

Resolving Common Errors

The following are common errors:

- Enclose all functions, such as `mResult`, in brackets. A formula must have a set of each colored bracket.
  
  This is incorrect: `Average(mresult "measurename")`. This is correct: `Average(mResult("Measure")).`

- Enclose the name of any object you use in a measure, in quotation marks.
  
  This is incorrect: `MIN(onScorecardMeasures) score,Revenue)`. This is correct: `MIN(onScorecardMeasures) score,"Revenue")`.

- Enclose the name of all dimensional measures that you use in a formula in square brackets.
  
  This is incorrect: `MAX(dimensionalMeasure result, “Revenue”, [“Venice, “Products”])`. This is correct: `MAX(dimensionalMeasure result, “Revenue”, [“Venice”, “Products”]).`
Validating all Formulas

Use the Formula Error Report to identify objects in an application that have errors in their formulas. The report identifies errors in the following:

- Measure result, target, score, and period-to-date formulas
- The range for performance indicators
- Formulas that are used to trigger alerts

To generate a Formula Error Report, select Administration, then Formula Errors. The report provides this data that you can use to resolve errors:

- The name of the measure or performance indicator that has an error in its formulas
- The kind of formula, such as score, that contains the error
- Section of the formula that is invalid
- An explanation of why the section is invalid
Using Performance Scorecard Data With Interactive Reporting

You can use Oracle's Hyperion® Interactive Reporting Studio to access Performance Scorecard data. The data displayed is obtained from the Star Schema tables that are generated in Performance Scorecard by administrators. By default, you can access Performance Scorecard data in Interactive Reporting using these pre-formatted reports:

- Scorecard
- Strategy scorecard
- Scorecard (Measure Trend)

To use Performance Scorecard with Interactive Reporting, perform these tasks:

1. Create an ODBC connection, and add the connection to the DAS service.
2. Create a database connection (an OCE file), that contains connection parameters. The integration retrieves results from the Interactive Reporting Server, using BQY files that are also created in Interactive Reporting. For detailed instructions on creating the OCE file, see the Interactive Reporting documentation.
3. Publish the OCE file.
4. Publish the BQY file which contains the queries and parameters for the report. See the Interactive Reporting documentation.
5. Launch Performance Scorecard to generate the Star Schema database, and create the custom report links to view the reports.
Default Generated Reports

By default, these pre-formatted Performance Scorecard reports are available:

- Scorecard report
- Strategy scorecard report
- Scorecard (Measure Trend)

Each report is generated by a pre-formatted $BQY$ file that specifies the Smart Cut parameters used to generate the report. You can modify the $BQY$ files used for the default reports as a starting place to create your own customized reports.

You can also create generic reports that enable you to use Performance Scorecard data with custom Interactive Reporting reports. This enables you to report on multiple scorecards or measures, access more data, and generate reports on queries, such as a Debug report.

Scorecard Report

The Scorecard Report is generated by the $Scorecard.bqy$. It provides this information about a selected employee scorecard using measures and dimensional measures:

- Scorecard name
- Perspective, if available
- Measure name
- Measure unit
- Measure Target
- Measure Result
- Measure Score
- Performance Indicator

Use these parameters:

- ScorecardName is the name of the scorecard in Performance Scorecard.
- Date is the reporting date for the scorecard, in the format $MMDDYYYY$ where $MM$ starts at 01 for January.

Use the list to select measures on the report for review.

Scorecard with Measure Trends

The Scorecard with Measure Trends Report is generated by the $Scorecard_withTrend.bqy$. It provides the Trending Table details for one or more measures on a selected scorecard. You can view all, or some of the available scorecards. The details are presented in a table format, and
the values and performance indicator enable you to evaluate the trend for the selected measure for the specified date or date range:

**Note:** This report does not display dimensional measures.

Use these parameters:

- ScorecardName is the name of the scorecard in Performance Scorecard
- Date1 - Date6 requires at least one of the six dates

The Display Measure list displays all of the measures that are listed on the report. Use the list to select an individual measure from the report for review.

The Employee Scorecard Report with Trends provides this information:

- Measure name
- Performance Indicator
- Measure score, result and target for each selected date

**Strategy Scorecard**

The Strategy Scorecard Report is generated by the `StrategyDashboard.bqy`. It provides an overview of the components of the strategic objectives, including a graphic display of the current results versus targets for a selected measure. The dashboard offers the opportunity to view the current progress of the strategy, add notes regarding the analysis, opportunities and issues that apply to the strategy, and to view actions or strategic initiatives.

**Note:** This report does not display dimensional measures.

The BQY file uses these parameters:

- ScorecardName is the name of the strategy element in Performance Scorecard
- Date1 - Date6 requires at least one of the six dates

Use the Measure list to select measures on the report for review. The Results versus Targets are displayed in a graphical format.

The Strategy Dashboard provides this information:

- Selected dates or date range for the strategy
- Strategy owners
- Strategy Name and description
- Perspective, if available
- Theme
- Name of the associated measures, available from the list
Bar chart that illustrates the Results versus Target for the selected measure for the strategy. This chart is only displayed if a unit is associated with the measure.

- Notes and comments on various subjects relating to the strategy to provide analysis of the strategy, opportunities for improvement or change, or issues that must be addressed.

- Current Actions and Strategic Initiatives that are associated with this strategy element

**Interactive Reporting and BI Report Settings**

To generate custom measure reports:

1. On the Report Setup box, select **Test or Generic**.
2. In **Name**, enter the name of the report.
3. In **Server**, enter the name of the server.
4. Click **Scorecard** to select a measure on a scorecard.
5. Click **Select** in **Measure** to select a measure.
6. Click **Select** in **Dimension** to use data intersection points.
7. Specify the date on which to generate the report by clicking the Calendar icon, ☀️, and selecting the day.
8. Click **Add** to insert fields for the content of the report. Enter the name of each field in the first box to the left.
9. You can use this data:
   - Reporting Date—Current reporting date selected in the Performance Scorecard toolbar. Specify in dd/MM/yyyy format.
   - Reporting Day—Number of the day (dd) of the reporting date. Use to construct your own date format.
   - Reporting Month—Number of the month (MM) of the reporting date. Use to construct your own date format.
   - Reporting Year—Number of the year (yyyy) of the reporting date. Use to construct your own date format.
   - Reporting Period—Name of the reporting period corresponding to the current reporting date, such as a financial quarter.
   - Current Target Name—Name of the target selected from the Report Target list on the Performance Scorecard toolbar.
   - Current Target Key—The primary key of the report target
   - Current Target ID—ID that uniquely identifies the report target in Performance Scorecard.
10. Click **Save**.
Generating Interactive Reporting Containing Performance Scorecard Data

You can generate reports through the Interactive Reporting from the Performance Scorecard database, as outlined in these procedures:

- Create an Interactive Reporting database connection (OCE file).
- Import the Open Catalog Extension (OCE) file.
- Publish the file.
- Generate the Star Schema database and the report. See the Oracle Hyperion Performance Scorecard Administrator’s Guide.
- View the reports.
- Create links to the generated reports.

Creating the OCE File

An Interactive Reporting database connection file (OCE) is a portable file that describes the connection to your data source for the relational or Essbase database. The file can be created in Interactive Reporting, and stores information about the database connections, such as user names and passwords.

If you frequently generate the same report, you only require one OCE file. If you create custom reports that access data from multiple sources, you may need many OCE files for one report.

To create an Interactive Reports OCE file:

1. Create an ODBC connection on the Interactive Reporting computer to the database that is to be used by the report.
2. Add the ODBC connection information including the connection type (ODBC), database type and the name of the data source, which is the ODBC connection name.
3. Select Start, then Programs, then Oracle EPM, and then Interactive Reporting Studio to create the OCE file.
   The Database Connection Wizard is displayed.
4. Under Create a New Document, click A New Database Connection File, and select Repository Document from the list.
5. Complete the wizard screens to define the database connection information:
   - Select ODBC as the type of connection software.
   - Select the database type.
   - Enter the database User Name and password
   - Enter the IP address or name of the ODBC database host
6. Click Finish.
7. Save the OCE file.
Close the Interactive Reporting Studio.
Import and publish the file to the Interactive Reporting Server.

**Importing the OCE File**

After creating the OCE file, it must be imported to the EPM Workspace server for use in generating the reports.

To import the OCE file:

1. Log on to EPM Workspace as an Administrator, and ensure that the Hyperion Workspace Agent and Web Application services are running.
2. Select Explore and navigate to the location of the repository.
3. Right-click, and then select New Folder to create a folder for the imported file. If you do not want to create a folder, leave the file under the Root (/:).

   The Create New Folder box is displayed.
4. Enter the name of the new folder, then click OK.
5. Select the new folder.
6. Right-click to display the shortcut menu, and select Import, then File to publish the .OCE file within Interactive Reporting.

   The Choose File tab is displayed.
7. Under File on the Choose File tab, click Browse to navigate to the location of the .OCE file.

   By default, the file is located in c:\hyperion\products\BIPlus\data\OpenCatalogExtensions.
8. Click Next.
9. Under Processing OCE Options, select these options and information:
   - From Data source access, select Use the username/password specified below.
   - Enter the Username and Password for the database.
   - Select Allow pass-through where end user’s authentication system is enabled for it.
10. Click Finish.

**Importing the BQY File**

Within Interactive Reports, a report is stored as a BQY file that defines the format and structure.

These sample BQY files are provided:

- Scorecard.bqy.
- Scorecard_withMeasureTrend.bqy.
- StrategyDashboard.bqy.
Use these files as a basis for creating your own reports.

To import BQY fileS:

1. Log on to EPM Workspace as an Administrator.
2. On the View Pane, navigate to the location of the .OCE folder.
3. Right-click on the folder to display the shortcut menu, and select Import File to access the sample BQY reports.
4. Under File on the Choose File tab, click Browse to navigate to the location of the selected BQY file, then click Next. By default, the sample files are located in C:\Hyperion\products \PerformanceScorecard\AppServer\InstallableApps\common\Reports \Template_BI+.
5. Click Next.

The Choose File tab is displayed.
6. From the Choose File tab, click Edit Permissions to display the Properties page to set the access level for the reports.
7. Select the users, roles or groups who are to be given access to the report from the Available Users, Groups and Roles list.
8. Move the identified users to the Selected Users, Groups and Roles list.
9. Click Edit.
10. From Edit Permissions, select the appropriate level of Access to File, such as No Access or Full Control.
11. Select the Adaptive State, or the level of access the user will have to modify the report, such as View Only or Query and Analyze.
12. Under Favorite, select Inherit or Pushed.
13. Click OK to close the Edit Permissions dialog box.
14. From the Properties dialog box, click OK to save the new permissions.
15. Click Next.

The IR Properties tab is displayed.
16. From the Set all queries to obtain the username/password: list, select From OCE Default.
17. From Connection, select the OCE file for each Query/Data Model Name.

The Username Password and Options information is automatically populated from the OCE file.
18. Under Interactive reporting Options, select Enable ADR.
19. Click Next.

The Username Password and Options information is automatically populated from the .OCE file. The report is now published and available for generation in Performance Scorecard.
Generating an Interactive Reporting Report

After the OCE and EQY files are imported to Interactive Reporting, you can generate reports.

To generate a report through Interactive Reporting:

1. From the Windows menu, select Start, then Settings, then Control Panel, and then Services to display the Services window.

2. Ensure that the Hyperion Workspace Agent and Hyperion Workspace Web Application services are running.

3. Launch Oracle Enterprise Performance Management Workspace, Fusion Edition, using this URL:
   `http://server:port/workspace`

4. Log on to Performance Scorecard as an Administrator.

5. Select Administration, and then Star Schema Generation.
   The Star Schema Generation page is displayed.

6. Select the desired content:
   - Under Time Options, select the dates for which to view results. If you do not need data for all dates, select Calculate for Dates from Date, and select a date range from the calendar.
   - Under Generate Star Schema Rows, select the dates that you require data to be generated for the report.
   - Under Star Schema Structure, select the appropriate option. If you use measure weights, select Create with Weights Included.

7. Clear Generate Oracle Essbase Database and Conform to Essbase Naming Restrictions.

8. Click Create Database.

9. Optional: Create a link to the report.

Viewing Generated Reports

To view generated reports:

1. In Performance Scorecard, select Reports, and then Custom Reports on the Browser View.

2. Select the customized report that you added to your preferences. The name of the report is the name that you entered when generating the report.
Adding Links to Custom and Interactive Reporting Reports

You can generate and create links to default and custom Interactive Reporting reports from your application. Links to these reports display in the Custom Reports folder on the Browser View.

To create links to custom reports:

1. In Performance Scorecard, select File, and then Scorecard Configuration.
2. Select Reports.
3. Click Add Report.
   The Report Setup is displayed.
4. Under Select Report Type, select the type of report to generate:
   - Scorecard
   - Strategy Scorecard
   - Scorecard (Measure Trend)
   - Generic Reports
   The Report Setup for the selected report type is displayed.
5. Under Name, enter a unique name for the Interactive Reporting or Interactive Reporting report.
   This information is displayed:
   - Server—Name of the Interactive Reporting or Interactive Reporting server.
   - Port—Server port number.
   - Location—Path to the Interactive Reporting BQY or OCE file.
6. Beside Scorecard Name, click Scorecard to select the scorecard to use to generate the report.
   Note: If you need to generate a report for multiple scorecards, select the Generic report type.
7. From Select Scorecard Type, select the type of scorecard, such as Strategy, for the report.
8. From the box that is displayed, select the scorecard as follows:
   - For Employees, click Search, and then select the employee name.
   - For Accountability and Strategy Elements, expand the map on which the element is used to select the element.
   The scorecard name is displayed under the Value column.
9. Beside Date, click the calendar button, , to select the date for which to generate the report.
   The dates available differs by scorecard type.
   - Scorecard Report has one
   - Strategy Scorecard Report has two
Scorecard (Measure Trend) Report has six dates

10 Click Save.

The name and URL for the new report are added to the list of external reports on the Report Setup tab.

11 Optional: Select Launch In New Window to display the report in a separate browser window.

12 Click Save.

13 Optional: Add the new link to the Report Type list:

   a. Navigate to ReportTypes.xml to add the report type. By default, this file is installed in
      
      C:\oracle instance\epmsystem1\HPS\AppServer\InstalledApps
      \Embedded Java Container (Tomcat)\5.0.28\webreportsDomain\webapps
      \HPSWebReports\WEB-INF\classes

   b. Locate this section of text:

      <ReportType name="Test" type="IR" sortOrder="4" port="19000"
      server="localhost" location="workspace/browse/get/HPSWebReports/
      Test.bqy"

   c. Add the new report type before the final /ReportType tag, in this format:

      <parameter name="(report)" type="(type)" sortOrder="(Sequence of Display on Report
      List)" required="(True or False)="/>

      The report is displayed in the Custom Reports folder.

Linking to Generic Performance Scorecard Reports

You can create generic reports in Performance Scorecard that have different requirements than the default reports. For example, create generic reports to reflect multiple measures and queries. Add links to these reports on the Performance Scorecard Browser View as follows.

To create links to generic reports:

1 Select File, and then Scorecard Configuration.

2 Select Reports.

3 Click Add Report.

   The Report Setup is displayed.

4 Under Select Report Type, select Generic.

   The Generic Report Setup is displayed.

5 Under Name, enter a unique name for the Oracle's Hyperion® Interactive Reporting or Business Intelligence report.

6 If you are creating a Business Intelligence report, select BI. If you are creating an Intelligence Reporting report, select IR:
The name and port number of the Interactive Reports server is displayed, and the location of the BQY and OCE files.

7 **Specify values for these Parameters:**
   - ScorecardName—Name of the selected scorecard
   - MeasureName—Name of the selected measure
   - Date—Date for which to generate the report in ddMMyyyy format
   - DimensionName—Name of the selected dimension
   - Query—Enter true to use a query. Otherwise enter false

8 **Optional:** Click Add to create an additional row for new parameters and values. Repeat this step to add as many rows as required.

9 Click Save.

The name and URL for the new report are added to the list of external reports.

10 **Optional:** Select Launch in New Window to display the report in a new browser window when viewed.

11 Click Save.

12 **Optional:** Add the new link to the Report Type list:
   a. Navigate to ReportTypes.xml to add the report type and name. By default, this file is installed in:
      \Hyperion\hps\9.5\AppServer\InstalledApps\Embedded Java Container (Tomcat)\5.0.28\webreportsDomain\webapps \HPSWebReports\WEB-INF\classes
   b. Locate this section of code:
      ```xml
      <ReportType name="Test" type="IR" sortOrder="4" port="19000" server="localhost" location="workspace/browse/get/HPSWebReorts/Test.bqy"
      
      c. Add the new report name and type to the list before the final /ReportType tag, using this format:
      ```xml
      parameter name="(report)" type="(report type)"
      sortOrder="(sequence on report list)" required="(True or False)"/>
      ```

   **Note:** To use a special character such as an apostrophe, enter a backslash (\), before the character. For example, LastQuarter’s Financial Report.

The report is displayed in the Custom Reports folder on the Browser View.
Images and Attachments

Why do image files with special characters in the file name sometimes not display correctly?

Images with non-standard characters in their names, such as the Euro symbol, may not display on Tomcat. Perform this procedure to resolve this issue.

1. Open `HPS deployment\server.xml` in any text editor.
2. Locate this portion of code:
   ```xml
   enableLookups="true" redirectPort="8443"
   acceptCount="100" debug="0" connectionTimeout="20000"
   useURIVалиdationHack="false" disableUploadTimeout="true"/>
   ```
3. Add this code to the last line:
   ```xml
   URIEncoding="UTF-8"/>
   ```
   The code should now look like this:
   ```xml
   enableLookups="true" redirectPort="8443"
   acceptCount="100" debug="0" connectionTimeout="20000"
   useURIVалиdationHack="false" disableUploadTimeout="true" URIEncoding="UTF-8"/>
   ```
4. Save and close the file.
Maps

Do I have to define Strategy Trees and Accountability maps?

No. However, the ability to align performance with individual strategy goals and business units is a key feature of the product. Consequently, building maps enables you to identify the elements responsible for performance and adjust these elements as needed to improve performance.

I am using UNIX and receive an “Unable to load Strategy map” error message when I open a Strategy map. How can I resolve this issue?

Perform the steps for your application server:

On Tomcat:

➢ To open a Strategy map:

1 Stop Performance Scorecard and the application server.

2 In any text editor, open startHPS.sh.

   This file is in: Performance Scorecard install\AppServer\Tomcat\5.0.28\webReportsDomain\bin

3 Change this line of code:
   CATALINA_OPTS="Xms256 -Xm1024M"

   to:
   CATALINA_OPTS=-Xms256M -Xmx1024M -Djava.awt.headless="true"

4 Save and close the file.

5 Restart the application server and Performance Scorecard

On WebLogic:

➢ To open a Strategy map:

1 In any text editor, open startHPS.sh.

   This file is in: HPS install\AppServer\WebLogic\WebLogic version\webReportsDomain

2 Change this line of code:
   JAVA_OPTIONS=-server -Xms256m -Xmx1024

   to:
   JAVA_OPTIONS=-server -Xms256m-Xmx1024m -Djava.awt.headless=true

3 Save and close the file.

On WebSphere:

➢ To open a Strategy map:

1 Log on to the WebSphere Administration Console.
2 Select Application Servers\webreportsDomain\Process Definition\Java Virtual Machine\Custom Properties.

3 Enter “java.awt.headless” in the appropriate box.

4 Enter true as the filed value.

5 Click Apply and then Save Link.

6 Log out of the console.

Measures and Scorecards

Can I insert measure data from different sources in applications?

Yes, you can use data from multiple sources such as SAP, JD Edwards, Oracle Financials, Analytic Services and spreadsheets using Oracle’s Hyperion® Application Link.

How many characters can I use in a measure formula?

You can use 2000 characters in a formula. However, large formulas may become difficult to maintain and impact performance.

Alerts

Why do changes that should increase alert notifications being sent, not trigger notifications as quickly as expected?

Oracle Hyperion Performance Scorecard, Fusion Edition looks for changes to business objects that may trigger alerts every 150 seconds. Follow the steps below to change this interval.

To change the alert time interval:

1 Navigate to the directory for your application server:
   • Tomcat: hps\9.5\Appserver\installedApps\Tomcat\5.0.28\webappsconf\config
   • WebLogic and WebSphere: application server\webappsconf\config

2 Open AlerterConfig.properties in any text editor.

3 Scroll to Data Change Monitor Settings.

4 Change the default value of 150 seconds as required:
   hyperion.hps.data_watcher_service.class_name=com.hyperion.pmd.hps.service.datawatcher.AuditTrailWatcherWithCacheSynchronizer
   hyperion.hps.data_watcher_service.change_check_interval_seconds=150

5 Save and close the file.
accountability element or team  Usually used on an Accountability map, the accountability element represents the individuals or groups responsible for performing specific tasks or taking ownership of specific strategy elements.

accountability map  A visual, hierarchical representation of the responsibility, reporting, and dependency structure of the accountability teams (also known as critical business areas) in an organization.

admin security role  One of three default security roles provided, this role enables users to whose account it is applied to perform administrative tasks, such as create domains, manage user accounts, generate a Hyperion Essbase database, monitor alert activity, enable external authentication, and use Shared Services.

alert  Object to which you subscribe to receive e-mail notification when performance for business objects departs from a defined acceptable range. Alerts can also be created to prompt subscribers when application-building tasks, such as measure result collection or initiative completion, are approaching or past their specified completion date.

alerter  Component of Hyperion Performance Scorecard that facilitates alert notification e-mail and enables administrators to monitor alert activity. The alerter is deployed as a separate application to the Web application server.

application  1) A software program designed to run a specific task or group of tasks such as a spreadsheet program or database management system. 2) A related set of dimensions and dimension members that are used to meet a specific set of analytical requirements, reporting requirements, or both.

Audit Report  An administrative feature that contains a record of all modifications made to the application and application components. Use the report to access information about which applications or application components have been modified, when, and by whom.

Balanced Scorecard  A framework that emphasizes the role of your organization’s strategy and the achievement of strategic goals based on the use of financial, customer, internal, and learning and growth perspectives.

business area  See critical business area (CBA), or accountability element or team.

business object  Any application component, such as a scorecard, measure, employee, variable, or framework. Changes to business objects are tracked using the Audit report.

cascading scorecard  A scorecard that uses the scores of other, lower-level scorecards. For example, if you are building a scorecard for an element or employee that is responsible for, or whose performance should be affected by a lower-level scorecard score, you can add the lower-level scorecard to the scorecard you are building.

cause and effect map  A map that depicts how the elements that form your corporate strategy relate and how they work together to meet your organization’s strategic goals. A Cause and Effect map tab is automatically created for each Strategy map.

child  An application component that is directly connected to another (parent) component as seen on Strategy maps, Accountability maps, and with scorecards.
collection extension  An additional number of days that increase a measure’s frequency, during which a measure’s result collector can enter or modify measure results before the measure is locked. For example, for a measure with an expected collection date of May 26th, giving a collection extension of 3 days means that result collectors for the measure have until May 29th to enter or modify result values. After this date, May 30th and onward, the measure is locked.

collection frequency  Generates a list of expected measure result collection dates. For example, to collect measure data twice a year, specify a collection frequency of semi-annually. If the dates calculated by this frequency elapse without a result being entered, and a collection extension for the measure is not given, the measure becomes locked and result collectors cannot enter result data.

comparator  Also called a target, a comparator is a specific result value which a measure is expected or anticipated to collect in a particular period of time. Use multiple measure comparators to assess measure results against a variety of internal or external values. For example, you may want to establish a short and a long term comparator for a measure. Comparator values are entered using Hyperion Performance Scorecard’s reports.

composite measure  A measure that uses other measure result data to calculate its results. For example, employee productivity can be expressed as a composite measure because it can be assessed by examining: hours worked by employee, quantity of employee work, and quality of employee work.

critical business area (CBA)  An individual or a group organized into a division, region, plant, cost center, profit center, project team, or process; also called accountability team or business area.

critical success factor (CSF)  A capability that must be established and sustained to achieve a strategic objective; owned by a strategic objective or a critical process and is a parent to one or more actions.

designer  Security role assigned to users and employees who build and modify applications and scorecards using the Designer work area. A designer user account is also provided with the product that can be used to log on and use Hyperion Performance Scorecard before specific user accounts have been created.

designer security role  One of three default security roles provided, this role enables users to whose account it is applied to build and modify business objects using the object view.

dimension  A data category used to organize business data for the retrieval and preservation of values. Dimensions usually contain hierarchies of related members grouped within them. For example, a Year dimension often includes members for each time period, such as quarters and months.

dimension measure template  Template with one or more associated dimensions that is used to create dimensional measures. Associating a dimension with a Dimension Measure Template automatically creates a dimension measure for each dimension member within the associated dimension.

dimensional measure  A measure to which dimensional information is assigned. A dimension lets you group and analyze measure logically.

domain  Object defined by an administrator that represents either a functionally or geographically distinct business area, such as a regional office, or a department within an organization. Most business objects, such as measures, employees, and scorecards, are assigned to a particular domain. For example, scorecards assessing employee productivity may belong to the Human Resources domain.

employee  A user responsible for, or associated with, specific business objects. Employees need not work for an organization; for example, they can be consultants. Employees must be associated with user accounts, for authorization purposes.

employee profile report  Provides detailed information about each employee in your application, including the employee’s scorecard and responsibilities.

equalize.  A scorecard building feature that enables users to assign the same weighting to all measures on a scorecard.

external authentication  Logging on to Oracle EPM System products with user information stored outside the application. The user account is maintained by the EPM System, but password administration and user authentication are performed by an external service, using a corporate directory such as Oracle Internet Directory (OID) or Microsoft Active Directory (MSAD).
framework  A methodology that facilitates a disciplined approach to translate performance strategy into action. Frameworks identify areas that are critical to the achievement of organizational goals and performance targets and outline how they must act to achieve the mission and vision of the organization. Often called "The pillars of success". Commonly used frameworks include Balanced Scorecard, Malcolm Baldridge, and Andersen Value Dynamics.

frequency  Determines when, how often, and the latest possible date on which measure results must be collected. See collection frequency and result frequency.

initiative  A task or group of tasks that an organization executes to achieve one or more strategic objectives. In a Hyperion Performance Scorecard application, each action box represents an activity or task that helps to accomplish a strategic objective. See action.

initiative status report  Lists the strategy and accountability elements to which initiatives are attached and the individuals or groups who are responsible for carrying them out. The Initiatives Status report also identifies the status, priority, and assigned completion date of each initiative.

integration  A process that is run to move data between Oracle's Hyperion applications using Shared Services. Data integration definitions specify the data moving between a source application and a destination application, and they enable the data movements to be grouped, ordered, and scheduled.

Locked Business Object Report  Identifies and unlocks business objects such as measures, targets, and reports that are locked because they are being modified or have become otherwise frozen.

Map Navigator  A feature that displays your current position on a Strategy, Accountability, or Cause and Effect map, indicated by a red outline.

measure  Objective, quantifiable data that indicates the level of progress toward a performance target. Measure results can be scalable (fall within a range of values) or absolute. Measures are associated with strategy elements and accountability teams.

measure performance report  Hyperion Performance Scorecard report that provides detailed information about each measure.

measure permissions  Setting specified for a user account’s security role that provides global or conditional access to measures.

metadata  A set of data that defines and describes the properties and attributes of the data stored in a database or used by an application. Examples of metadata are dimension names, member names, properties, time periods, and security.

mission  A statement that defines the immediate, key business goals of the accountability teams or critical business areas that form the structure of that organization.

model 1) In data mining, a collection of an algorithm’s findings about examined data. A model can be applied against a wider data set to generate useful information about that data. 2) A file or content string containing an application-specific representation of data. Models are the basic data managed by Shared Services, of two major types: dimensional and nondimensional application objects. 3) In Business Modeling, a network of boxes connected to represent and calculate the operational and financial flow through the area being examined.

multidimensional database  A method of organizing, storing, and referencing data through three or more dimensions. An individual value is the intersection point for a set of dimensions. Contrast with relational database.

non-dimensional model  In Shared Services, a type of model that includes application objects, such as security files, member lists, calculation scripts and Web forms.

normalize  This feature is a scorecard building option that can be used if a scorecard’s weight must add to 100, but users want to retain the different weighting ratio for each measure and perspective on the scorecard.

owner  The individual or group responsible for a strategy element.

parent  An application component, such as an Entity or strategic objective that has one or more application components below it on a map that are directly connected to it. These components are called its children. Scorecards can also be parents if lower-level scorecards are attached to them.
**performance indicator**  An image file used to represent measure and scorecard performance based on a range you specify; also called a status symbol. You can use the default performance indicators or create an unlimited number of your own.

**permission**  Security role setting that defines a user’s access to scorecards and measures.

**perspective**  A category used to group measures on a scorecard or strategic objectives within an application. A perspective can represent a key stakeholder (such as a customer, employee, or shareholder/financial) or a key competency area (such as time, cost, or quality).

**primary measure**  A high-priority measure important to your company and business needs. Displayed in the Contents frame.

**product**  In Shared Services, an application type, such as Planning or Performance Scorecard.

**promotion**  Means of transferring application data to a different environment or database server. Promotion is essentially the replication of application data from one environment such as development to another environment such as production.

**restriction**  Means of denying access to specific measures, scorecards, and web pages. Restrictions are applied to security roles which are applied to user accounts.

**result date**  The day on which Hyperion Performance Scorecard collects a measure result value as determined by a measure’s frequency, for use in reports.

**result formula**  A measure’s result formula determines how measure result data is calculated and assessed. For example a result formula for the measure Net Income could be: \((\text{mResult("Net Sales") - mResult("Cost of Sales") - mResult("Operating Expenses")})\).

**result frequency**  The algorithm used to create a set of dates to collect and display results.

**role**  The means by which access permissions are granted to users and groups for resources.

**score**  The level at which targets are achieved, usually expressed as a percentage of the target.

**scorecard**  A business object that represents the progress of an employee, strategy element, or accountability element toward goals. Scorecards ascertain this progress based on data collected for each measure and child scorecard added to the scorecard.

**scoring formula**  A score formula for a measure determines how the measure’s results will be assessed to produce a final measure score.

**secondary measure**  A low-priority measure, less important than primary measures. Secondary measures do not have Performance reports but can be used on scorecards and to create dimension measure templates.

**service provider**  Authentication provider.

**Shared Services Registry**  The part of the Shared Services repository that manages EPM System deployment information for most EPM System products, including installation directories, database settings, computer names, ports, servers, URLs, and dependent service data.

**Stern Stewart's EVA Framework**.  Framework reputed to capture the true economic profit of an organization by calculating the net operating profit minus an appropriate charge for the opportunity cost of all capital invested in an enterprise. This framework is meant to provide the most accurate measure of corporate performance over any given time.

**strategic objective (SO)**  A long-term goal defined by measurable results. Each strategic objective is associated with one perspective in the application, has one parent, the entity, and is a parent to critical success factors or other strategic objectives.

**strategic theme**  High-level categories of strategy you can use to group lower-level strategy elements on Cause and Effect maps.

**Strategy Map**  Represents how the organization implements high-level mission and vision statements into lower-level, constituent strategic goals and objectives.

**synchronized**  The condition that exists when the latest version of a model resides in both the application and in Shared Services. See also model.

**target**  Expected results of a measure for a specified period of time (day, quarter, and so on).
**user directory**  A centralized location for user and group information, also known as a repository or provider. Popular user directories include Oracle Internet Directory (OID), Microsoft Active Directory (MSAD), and Sun Java System Directory Server.

**vision**  Definition created by a business or organization of its goals and business strategies.

**weight**  A value assigned to an item on a scorecard that indicates the relative importance of that item in the calculation of the overall scorecard score. The weighting of all items on a scorecard accumulates to 100%. For example, to recognize the importance of developing new features for a product, the measure for New Features Coded on a developer’s scorecard would be assigned a higher weighting than a measure for Number of Minor Defect Fixes.
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