HYPERION® PERFORMANCE SCORECARD – SYSTEM 9

RELEASE 9.3.1

NEW FEATURES GUIDE

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Welcome to Oracle's Hyperion® Performance Scorecard – System 9. This document describes the new functionality in this release.

CONTENTS IN BRIEF

Application Design and Reports

Welcome to Performance Scorecard. This section describes the new tools available to designers who create objects such as maps and measures, and users who view and modify data using reports.

Scorecards

This section describes the scorecard enhancements in this release.

Scorecard Templates

Scorecard templates enable you to evaluate performance across an organization or department using common criteria. For example, this figure shows how both common corporate measures such as risk factors and regional-specific measures such as Sales Programs can be used to assess performance across an organization.
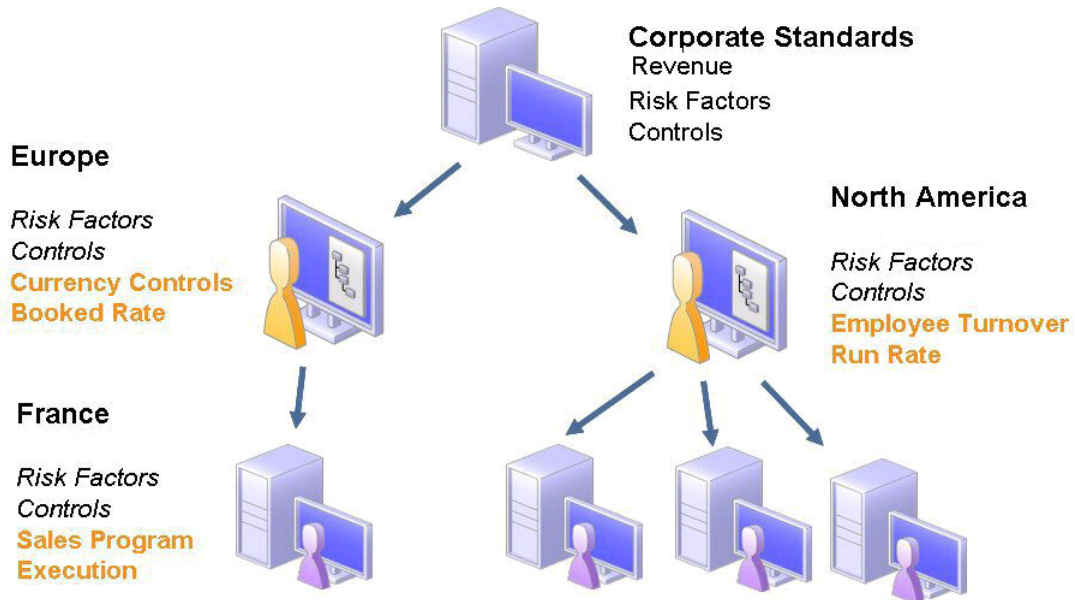
Assign a scorecard template to a new scorecard to transfer the scorecard components and their weightings to the scorecard. To guarantee that the components on the scorecard cannot be removed or modified, lock the scorecard.

See Chapter 8 of the *Hyperion Performance Scorecard – System 9 Application Designer's Guide*.

Secondary Scorecards

To evaluate and monitor the performance of your organization, strategy structures, and business areas in different context using different criteria, you can now create multiple, secondary scorecards.

Employees can use secondary scorecards to track the performance of the strategy elements, accountability elements, and initiatives with which they work.

Corporate Scorecarding

Secondary scorecards enable you to evaluate and monitor organizational performance in different business contexts using different, lower-level scorecards. In previous releases you placed these scorecards on the one scorecard attached to the entity representing your organization. To simplify this process, you can now perform these tasks:

● Create secondary scorecards using templates that contain measures templates. The dimensional context you specify for each scorecard enables you to select which dimensional measures to generate to use in scorecard calculations.

● Attach secondary scorecards directly to the Entity

See Chapter 8 of the *Hyperion Performance Scorecard – System 9 Application Designer's Guide*.

Employees and Secondary Scorecards

Most employees have a primary scorecard that their manager uses to monitor their performance. Employees can now create secondary scorecards to evaluate the performance of the objects that they can access. They can also specify which employees can access their scorecards.

See Chapter 7 of the *Hyperion Performance Scorecard — System 9 Application Designer's Guide*.

Default Scorecards and Scorecard Explorers

Performance Scorecard creates one empty scorecard for each employee, strategy element, and accountability element that you create. These scorecards are displayed in Scorecard explorers below each object on the Browser and Object view tabs.

Access scorecards as follows:

● Employee scorecards: Expand the Employee List explorer, select the employee, and then select the Scorecards explorer.

● Strategy or accountability element scorecards: Select the map of strategy tree, and then the Scorecard folder below the element. In the following example, scorecards for the Executive branch are displayed in the first Scorecards explorer. Scorecards for departments within the Executive branch, such as Human Resources, are displayed below.

Scorecard Categories

You can organize scorecards in reports and on the Browser View using categories. For example, to manage a sales office, a team of sales people, and record product returns you could create these scorecards and categories:

Table 1   : Sample Scorecard Categories

Category	Scorecard
Sales	
	Product1
	Product2
	Product3
Returns	
	Product1
	Product2
	Product3
Sales Team	
	Employee1
	Employee2
	Employee3

See Chapter 2 of the *Hyperion Performance Scorecard – System 9 Application Designer's Guide*.

System Dimensions

Performance Scorecard automatically creates an internal *system dimensional outline*, also called a *system map*, that represents the strategy elements, accountability elements, and employees that you define when you create maps. Changes you make to Strategy Trees and Accountability maps are automatically updated in the system. This dynamic system dimensional outline enables you to generate specific dimensional measures to monitor the performance of strategy and accountability elements represented in map structures.

See Chapter 5 of the *Hyperion Performance Scorecard — System 9 Application Designer's Guide*.

Maps

These changes have been made to maps:

- You can generate measure templates for scorecarding purposes based on Strategy Trees and Accountability 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.

- To better adhere to business performance management standards, such as the Balanced Scorecard Collaborative, Cause and Effect maps are called Strategy maps. Strategy maps are called Strategy Trees.

- Because maps are associated with the domains in which their strategy and accountability elements reside, new maps may not display as expected if you are using domain-based authorization. To associated maps with domains, use the Set Domain menu option in the Map Editor.

See Chapter 5 of the *Hyperion Performance Scorecard — System 9 Application Designer's Guide*.

Strategic Initiatives

Initiatives enable you to use measures, strategy elements, and business areas to achieve goals or projects associated with a particular reporting period. To develop more complex and interrelated initiatives, you can create initiative hierarchies associated with multiple objects. You can place the elements used to achieve initiatives on a single composite view to monitor their progress, troubleshooting as required. You can organize and filter initiatives by priority or status using categories. See the *Hyperion Performance Scorecard — System 9 User's Guide*.

Employee Responsibilities

You can create and manage employees faster by performing these tasks when you set up employees:

- Assign employees to the measures, strategy elements, and accountability elements with which they are associated. For example, you can specify the measures for which an employee must enter results.

- Transfer responsibilities between employees. This enables you to quickly reallocate tasks and assignments due to organizational changes such as acquisitions, retirements, and promotions. For example, when a departmental manager retires, you can transfer their responsibilities, such as their staff, to a replacement employee.

See Chapter 4 of the *Hyperion Performance Scorecard – System 9 Application Designer's Guide*.

Ranges

These enhancements enable you to create and apply more complex, variable, and customizable ranges:

- Named ranges: Enable you to use the same range of values to evaluate the performance of multiple measures or scorecards. This makes it faster and easier to create measures and scorecards when non-default ranges are used.

- Custom ranges: Enable you to modify named ranges for use with specific measures and scorecards during measure or scorecard setup.

- Formulas: You can define formulas for the range boundaries that evaluate the performance of measures, dimensional measures, scorecards, and alerts. You can use this in these formulas to reference the current measure or scorecard.

Measures

This section describes measure-related enhancements.

Dimensional Measure Generation

These enhancements have been made to dimensional measure generation:

- You can select the members for which to generate dimensional measures from complex custom dimensional outlines using the member selector.

- You can use the same result, score, and target formulas for dimensional measures that gather data for the lowest members in dimensional outlines.

- You can apply roll up functions such as MAX and SUM to the targets associated with dimensional measures.

See Chapter 7 of the *Hyperion Performance Scorecard — System 9 Application Designer's Guide.*

Measure Confidence

The measure confidence report setting enables you to indicate how many of the measures that affect the results and scores of dimensional measures, have results. By enabling you to identify how many contributing results are missing, you can more realistically interpret dimensional measure data. See the *Hyperion Performance Scorecard – System 9 User's Guide.*

Outdated and Missing Data

These enhancements have been made to application preferences that enable you to specify how to perform measure and scorecard calculations using missing (no value) or old (outdated) data:

- You can exclude measures without results from all calculations, and indicate missing values using a provided or custom representation.

  This option effects calculations that use functions such as SUM and AVERAGE, because the missing values are not considered data points.

- You can apply the settings that handle outdated measure results to outdated targets. This enables you to use targets defined for a previous period.

See Chapter 9 of the *Hyperion Performance Scorecard — System 9 Application Designer's Guide.*

Score Display

To better depict performance levels visually, you can specify background colors for measure and scorecard scores that are displayed in graphs, charts, and these reports:

- Measure Performance

- Measure Trend

- Scorecard Performance

- Scorecard Trend

- Scorecard Details

This enables you to communicate the performance levels that scores indicate. For example, although by default red represents poor performance, you can display scores indicating poor performance in purple, or another color that you choose. You select the background colors for scores when you create performance indicators that evaluate and represent measure and scorecard status.

Result and Target Entry

You can now enter results and targets simultaneously using the Results&Targets tab on Measure Detail reports. Also, targets automatically align with the collection dates determined by the result and collection frequencies. This means that you do not have to select the date on which to use a target since a list of dates is displayed and Performance Scorecard uses the target defined until the next result or collection date.

Note: Targets you enter override those calculated by a formula.

Custom Reporting

To leverage and maximize data, you can add links to generic Performance Scorecard reports and custom Oracle's Hyperion® Interactive Reporting – System 9 reports to your applications. If these reports are used frequently, you can add links on the Scorecard toolbar.

See the *Hyperion Performance Scorecard — System 9 Administrator's Guide*.

Alerts

Administrative users can prevent users from unsubscribing themselves, or others, from alerts. This ensures that the appropriate users continue to receive, and respond to alerts. To prevent users from unsubscribing from alerts, select the Prevent Users from Unsubscribing option when you create subscriptions. See Chapter 8 of the *Hyperion Performance Scorecard – System 9 User's Guide*.

Performance Scorecard Adapter Methods

The following are new or modified methods provided with this release of the Adapter. For information about each method, refer to the Adapter online help.

Table 2   Adapter Enhancements

Method	Description
Load and Extract Scorecards	The Scorecard Name port enables you to specify which scorecards, associated with an employee, strategy element, or accountability element, to load or extract.
Load Measure Annotation Creators	Annotations enable you to discuss the status and communicate action plans for business objects within a particular context or period of time, such as a financial quarter. This method enables you to assign employees to measures as Annotation Creators.
Load Measure Named Range	Create named ranges to use the same values to evaluate measure performance. This method enables you to attach an existing named range to measures.
Load Scorecard Named Range	Create named ranges to use the same values to evaluate scorecard performance. This method enables you to attach an existing named range to scorecards.

Navigational Enhancements

This section describes new features that make it easier to locate and work with business objects.

Application-Wide Search

The Search field on the toolbar enables you to find and view the current performance of employees, strategy elements, accountability elements, measures, and initiatives. You can locate these objects by searching by name or by performance status. For example, to find objects with poor performance, enter poor in the Search box. You can also enter a perspective name to list the measures associated with a perspective. Click links on the search result report to access more information about objects.

Context Menus

The context menu that is available on all view tabs enables you to perform these tasks:

- View certain kinds of employee, measure, and scorecard data.

  For example, to view previously collected measure results, right-click the measure and select View > Results.

- Create secondary scorecards for employees, strategy elements, and accountability elements. For example, to create a secondary employee scorecard, select their Scorecard explorer, right-click and select Add.

- Create links others can use in third-party tools such as E-mail to view application data. For example, to send colleagues a link to a scorecard, right-click the scorecard and select Copy Link, and paste the link in an E-mail message.

- Delete or modify objects.

List Filters and Selection

To quickly locate objects such as measures, you can filter data displayed on selection lists using this criteria:

- By dimension (for generically-named and well-formed dimensional measures): To select only from dimensional measures generated by a template, enter the template name in the Filter box on the Select Measure list.

- By name: To filter objects by name, begin typing the name in the Filter box on all selection lists.

You can select objects on long lists as follows:

- To select objects displayed consecutively, press **Shift** and select the items.

- To select objects that are not displayed consecutively, press **Ctrl** and select the items.

Administration

This section describes the administrative changes in this release.

Date Mapping in External Analytic Services Databases

If you use data in external Oracle's Hyperion® Essbase® – System 9 databases, in which you want to reverse the order of dimensional tuples mapped to dates, select the Is Reverse Order option on the Time Mapping tab of the External Datasource Setup page. See the *Hyperion Performance Scorecard — System 9 Administrator's Guide*.

Account and Security Role Duplication

To quickly specify the access rights of new Performance Scorecard users, you can copy user accounts, group accounts, and security roles. This enables you to apply the settings that determine access to data, such as permissions, from an existing user to a new user who requires similar access. Copied items display as `Copy of <name>` on security role and account type lists. The security roles attached to accounts that you copy are applied to new accounts.

See Chapter 2 of the*Hyperion Performance Scorecard — System 9 Administrator's Guide*.

Generic Domain Designer Security Role

To grant users access to only the business objects in the domain for the employee attached to their account, assign the generic domain designer role. To create a custom security role that provides the same level of access, select the Include employee domain option when you specify the permissions for the security role.

See Chapter 2 of the *Hyperion Performance Scorecard — System 9 Administrator's Guide*.

Security Role Setup

These enhancements have been made to the Security Role Setup page:

● The scorecard and measure permissions that determine the data that users can access are displayed in folders. Restricted reports and pages are displayed in the Webpage Restrictions folder.

● You can create, modify, or delete permissions by right-clicking and using the context menu. For example, to create a permission that provides access to measures, right-click Measure permission, and select Add.

See Chapter 2 of the *Hyperion Performance Scorecard — System 9 Administrator's Guide*.

Task-Based Permissions

Task-based permissions such as edit and delete enable you to define the tasks that users can perform on the measures and scorecards that they can access. For example, to prevent users from deleting the scorecards that they can access, disable the Delete permissions on the scorecard permissions page.

To enable users to monitor the performance of the objects they can access using strategic initiatives and secondary scorecards, select the Create Strategic Initiatives and Create Secondary Scorecards permissions.

See Chapter 2 of the *Hyperion Performance Scorecard — System 9 Administrator's Guide*.

Webpage Restriction

To prevent users from accessing specific features or types of information, such as certain scorecards, apply the corresponding webpage group restriction to security roles attached to user accounts. See Chapter 2 of the *Hyperion Performance Scorecard — System 9 Administrator's Guide*.

The Import Export Flat File Utility

In previous releases, Oracle's Hyperion® Performance Scorecard – System 9 provided Oracle's Hyperion® Application Link Basic (HAL) required for the Scorecard Adapter. In this release, the Scorecard Adapter requires the full version of HAL, which is not provided.

To use the Adapter without purchasing Oracle's Hyperion® Application Link Advanced, install the Import Export Flat File Utility component included in the Scorecard installation. See the *Hyperion Performance Scorecard — System 9 Installation Guide*. If you do not want to use Oracle's Hyperion® Application Link Advanced, install the Hyperion Data Integration Management Adapter for Scorecard. See the *Hyperion Performance Scorecard — System 9 Installation Guide*.

Installation and Configuration

These changes have been made to the installation and configuration:

- Custom component-based installation: You can select which Performance Scorecard components, such as the Alerter, to install using a custom installation. Custom installations enable you to:

  - Install only optional components.

  - Return through the installation, to select components that you may have forgotten.

  - Over-install selected components.

- Custom reconfiguration: Although you must perform all tasks required to initially configure Hyperion products, you can select individual reconfigruation tasks.

- Support for manual deployment to Java Enterprise and Oracle 10G application servers

- Common product and documentation source.

See the *Hyperion Performance Scorecard — System 9 Installation Guide.*

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