

Oracle® Balanced Scorecard

User Guide

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Oracle Balanced Scorecard User Guide, Release 12

Part No. B25163-02

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Preface

Intended Audience

Welcome to Release 12 of the *Oracle Balanced Scorecard User Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Computer desktop application usage and terminology

If you have never used Oracle Applications, we suggest you attend one or more of the Oracle Applications training classes available through Oracle University.

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

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Structure

- 1 Introduction
- 2 Using Oracle Balanced Scorecard
- 3 Using Dashboards and Reports

Related Information Sources

This document is included on the Oracle Applications Document Library, which is supplied in the Release 12 DVD Pack. You can download soft-copy documentation as PDF files from the Oracle Technology Network at <http://otn.oracle.com/documentation>, or you can purchase hard-copy documentation from the Oracle Store at <http://oraclestore.oracle.com>. The Oracle E-Business Suite Documentation Library Release 12 contains the latest information, including any documents that have changed significantly between releases. If substantial changes to this book are necessary, a revised version will be made available on the online documentation CD on Oracle *MetaLink*.

If this guide refers you to other Oracle Applications documentation, use only the Release 12 versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF** - PDF documentation is available for download from the Oracle Technology Network at <http://otn.oracle.com/documentation>.
- **Online Help** - Online help patches (HTML) are available on Oracle *MetaLink*.
- **Oracle MetaLink Knowledge Browser** - The Oracle *MetaLink* Knowledge Browser lets you browse the knowledge base, from a single product page, to find all documents for that product area. Use the Knowledge Browser to search for

release-specific information, such as FAQs, recent patches, alerts, white papers, troubleshooting tips, and other archived documents.

Related Guides

You should have the following related books on hand. Depending on the requirements of your particular installation, you may also need additional manuals or guides.

Oracle Applications Installation Guide: Using Rapid Install:

This guide provides information about using the Rapid Install utility to install Oracle Applications Release 12, or as a part of an upgrade from Release 11i to Release 12. Discusses Standard and Express installations, fresh or Vision Demo database installations, as well as techstack and product upgrades.

Oracle Applications Upgrade Guide: Release 11i to Release 12:

This guide provides information for DBAs and Applications Specialists who are responsible for upgrading a Release 11i Oracle Applications system (techstack and products) to Release 12. In addition to information about applying the upgrade driver, it outlines pre-upgrade steps and post-upgrade steps, and provides descriptions of product-specific functional changes and suggestions for verifying the upgrade and reducing downtime.

Oracle Applications Patching Procedures:

This guide describes how to patch the Oracle Applications file system and database using AutoPatch, and how to use other patching-related tools like AD Merge Patch, OAM Patch Wizard, and OAM Registered Flagged Files. Describes patch types and structure, and outlines some of the most commonly used patching procedures. Part of Maintaining Oracle Applications, a 3-book set that also includes Oracle Applications Maintenance Utilities and Oracle Applications Maintenance Procedures.

Oracle Applications Maintenance Utilities:

This guide describes how to run utilities, such as AD Administration and AD Controller, used to maintain the Oracle Applications file system and database. Outlines the actions performed by these utilities, such as monitoring parallel processes, generating Applications files, and maintaining Applications database entities. Part of Maintaining Oracle Applications, a 3-book set that also includes Oracle Applications Patching Procedures and Oracle Applications Maintenance Procedures.

Oracle Applications Maintenance Procedures:

This guide describes how to use AD maintenance utilities to complete tasks such as compiling invalid objects, managing parallel processing jobs, and maintaining snapshot information. Part of Maintaining Oracle Applications, a 3-book set that also includes Oracle Applications Patching Procedures and Oracle Applications Maintenance Utilities.

Oracle Balanced Scorecard Administrator Guide:

This guide describes how to set up and administer Oracle Balanced Scorecard and scorecard systems. For scorecard designers, this guide explains how to design and

prototype scorecards and measures. It also explains how to move scorecards into production. For administrators, this guide explains how to generate the database schema; load data; manage user and scorecard security; and migrate scorecards to other instances.

Oracle Balanced Scorecard Install Guide:

This guide describes how to how to install the Balanced Scorecard Architect components.

Oracle Daily Business Intelligence Implementation Guide:

This guide describes how to implement Oracle Daily Business Intelligence, including information on how to create custom dashboards, reports, and key performance indicators.

Oracle Daily Business Intelligence User Guide:

This guide describes how to use the preseeded Daily Business Intelligence dashboards, reports, and key performance indicators.

Oracle Embedded Data Warehouse User Guide:

This guide describes how to use Embedded Data Warehouse reports and workbooks to analyze performance.

Oracle Embedded Data Warehouse Implementation Guide:

This guide describes how to implement Embedded Data Warehouse, including how to set up the intelligence areas.

Oracle Embedded Data Warehouse Install Guide:

This guide describes how to install Embedded Data Warehouse, including how to create database links and create the end user layer (EUL).

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

Introduction

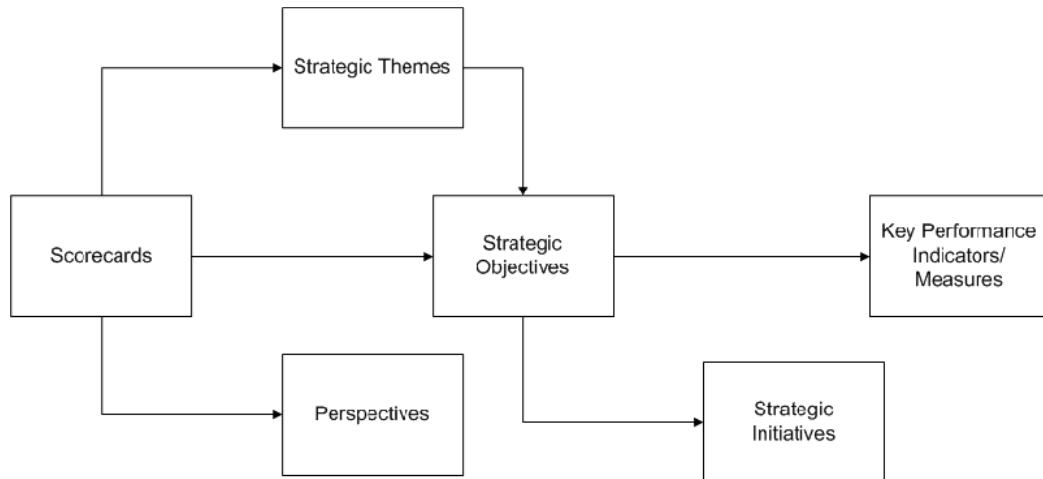
This chapter covers the following topics:

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

Balanced Scorecard Methodology

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

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



In the preceding figure, each scorecard contains a set of strategic themes and perspectives. These themes and perspectives are translated into strategic objectives. Strategic objectives are supported by strategic initiatives and can contain one or more measures. Strategic initiatives are the critical projects that an organization needs to complete to accomplish a strategic objective. Measures are the areas that an organization needs to focus on to accomplish a strategic objective. Measures are usually associated with a plan and an owner, so the people who are involved can follow up on the implementation of the strategy.

Balanced Scorecard Perspectives

The Balanced Scorecard methodology measures performance using four perspectives:

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

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

You need to understand how the financial perspective is related to the other Balanced Scorecard perspectives.

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

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

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

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

Oracle Balanced Scorecard

Oracle Balanced Scorecard is a strategic management application that is based on the Balanced Scorecard methodology developed by Kaplan and Norton. However, Balanced Scorecard can be used to represent any strategic methodology using scorecards.

Balanced Scorecard enables companies to represent their strategy in scorecards that are supported by objectives and KPIs and use those scorecards to measure performance.

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

Within Oracle Balanced Scorecard, each scorecard can be represented by several views. Each view lists the objectives that belong to the scorecard. You can drill on each objective to view an objective report which provides detailed information about the objective and the KPIs that support the objective. If you drill from the Custom View you can also drill to other views, applications, or URLs.

Oracle Balanced Scorecard is integrated with Oracle Daily Business Intelligence. Balanced Scorecard users who implement Daily Business Intelligence, can use the complete library of preseeded or custom content from Daily Business Intelligence. Leveraging preseeded Daily Business Intelligence content eliminates the need to map or load data into Balanced Scorecard, because the preseeded content is already mapped to Oracle Applications tables.

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

- **Viewers:** Are the end-users who are responsible for using scorecards to monitor performance.
- **Designers:** Are responsible for creating the scorecards.
They can also create custom dashboards and reports, and publish them.
- **Administrators:** Are responsible for setting up the application and maintaining the

data structure.

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

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

Terminology

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

- **Strategy:** A high-level plan that a company wants to follow. A strategy is generally a collection of objectives. For example, a strategy might be to improve overall business by increasing customer satisfaction, reducing the cost of goods sold, and increasing sales.
- **Scorecard:** A representation of a company strategy that maps objectives and KPIs to the strategy using the Balanced Scorecard methodology. Viewers use the scorecard to compare actual and planned performance.
- **Objective:** A strategic statement that represents a specific goal in a particular area. For example, Increase Revenue, Reduce Service Calls, and Maximize Sales Growth.
- **Objective Groups:** A group of objectives. Objective groups are used to organize content into perspectives such as financial, customer, internal, or learning.
- **Perspective:** The categories within which you classify KPIs and strategic components. Usually, four perspectives are available: financial, customer, internal, and learning. Depending on the configuration, some scorecard views display assessments that are grouped by perspective.

In the application, the perspectives can be created as Objective Groups.

- **Key Performance Indicators (KPIs):** A calculation or metric that is used to support an objective. Each objective can be supported by one or more KPIs; however, there is only one default KPI for each objective. The objective color method determines the status of the objective. KPIs can be preseeded or created by the scorecard designer.
- **Goal Type:** Indicates the direction the improvement of a KPI is desired. Balanced Scorecard supports three goal types: target met above plan, target met below plan, and target met within ranges.

Note: Goal type was previously referred to as Color Method.

- **Alarm:** Indicates the status of an objective or KPI. The possible statuses are good, acceptable, marginal, unacceptable, or critical.

The alarm status for a KPI status is based on how the KPI falls within a set of defined tolerance ranges for the KPI's expected performance. For example, if Revenue decreases by more than 5%, then the Revenue KPI alarm will indicate that Revenue is either marginal or unacceptable performance, depending on how the tolerance ranges are set.

If an objective is supported by several KPIs, then the objective color method determines the alarm status of the objective.

- **Trend:** Indicates the change in actual value of a KPI or objective over previous periods. The possible changes are acceptable decrease, acceptable increase, unacceptable increase, unacceptable decrease, no change, and no data. You cannot view trends for preseeded KPIs. The alarm color method chosen for an objective determines the objective trend.
- **Simulation:** "What if" scenarios that demonstrate the cause and effect relationship across selected KPIs.
- **Strategic Components:** Collectively, the objectives, reports, and simulations available in Balanced Scorecard are referred to as "strategic components."
- **Production:** Refers to any scorecard that is available to viewers in the List of Scorecard window. To be a production scorecard, the design must be complete and the Generate Database process and the Data Load process must have been run. Also, the user must be assigned access for the scorecard.
- **View:** A way of viewing a scorecard.

Each view is designed to provide a different perspective on that content by focusing on a different purpose, audience, layout, or organizational scheme. Five possible views are available:

- **Tree view:** It lists the perspectives or strategic themes, objectives, and KPIs of the scorecard organized into a tree like structure. This view also shows alarms and trends for KPIs and objectives.
- **Scorecard view:** It lists all objectives in the scorecard, organized into boxes. Each box represents a logical grouping of perspectives or strategic themes for the scorecard.
- **Strategy Map view:** It displays the cause and effect relationships between objectives. By depicting the strategy in this way, strategy maps explain not only what the organization wants to achieve (their financial outcomes), but also how they expect to get there through a series interrelated objectives. Strategy maps also help employees see how their jobs are linked to the organization's overall

objectives.

- **Detailed view:** It contains a complete list of objectives and KPIs in the scorecard. This view also shows alarms and trends for KPIs and objectives. The detailed view displays the underlying data for each objective and KPI including: Actual, Plan, Variation, and Percent of Plan data. This view enables interpretation on how the alarms and trends are calculated for each objective and KPI.
- **Custom view:** It can be designed for a specific audience or organizational schemes. It enables navigation across multiple related views and drill down to more detailed information for a particular scorecard. It also contains unique features, such as, *Hotspots* that link to an objective, and *Custom View Link* that link one custom view to another.
- **Dashboard:** A dashboard is a collection of content that is designed to meet the needs of a particular responsibility. Dashboards contain regions like parameters, tables, graphs, links, and KPIs.
- **Parameter:** Each dashboard contains a set of parameters that you can use to change the data that is displayed on the dashboard. Some parameters, such as Date or Period are common to all dashboards. Other parameters, such as Commodity, are unique to a specific dashboard. Parameters are based on dimensions, which organize data into reporting hierarchies. Each dashboard has a parameter that acts as the primary dimension for the dashboard. The primary dimension differs depending on the dashboard. For example, the primary dimension on the Profit and Loss dashboard is Manager.
- **Region:** A region is a unique set of information on a dashboard. There are types of regions: parameter, KPI, table, graph, custom scorecard, RSS feed, simulation view, links, and My Approvals. You can drill down to more detailed reports or to transaction details in Oracle Applications from all regions with the exception of the parameter region.
- **Reports:** You can drill to a report from any linked value in a dashboard. In general, reports contain detailed information on one or more KPIs. Reports contain graphs and a table region and they contain more parameters than a dashboard. Reports do not contain truncated values. You can drill from some reports directly into the transactional system.
- **Administrator:** The Balanced Scorecard administrator is responsible for installing, implementing, and maintaining Balanced Scorecard. The Balanced Scorecard administrator loads data and is responsible for managing any data-related issues. The scorecard administrator is also responsible for creating and setting up users, and securing scorecards, objectives, and display options.

- **Designer:** The Balanced Scorecard designer is responsible for creating the scorecards, views, KPIs, objectives, and dimensions. The scorecard designer defines the default settings for scorecards and the objective report. The scorecard designer also sets the alarm conditions for the objectives and KPIs, the goal types for KPIs, and enables trends for KPIs..

The scorecard designer can also create custom dashboards and reports, and publish them.

- **Viewer or End User:** The Viewer is the user who is responsible for using the scorecard to compare actual corporate performance to planned or forecasted performance.
- **Preseeded:** In this guide, *preseeded* is used to denote any content that is provided with Oracle Applications. For example, Oracle Daily Business Intelligence provides several preseeded KPIs that can be reused in other applications.
- **Custom:** In this guide, *custom* is used to denote any content that is created using the application.

Using Oracle Balanced Scorecard

This chapter covers the following topics:

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

List of Scorecards

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

Scorecard Hierarchies

If you have access to several scorecards, you may have a list of scorecards in which parent-child relationships are represented. If this is the case, the List of Scorecards may display a hierarchical tree with all the scorecards and the relations among them. The following considerations apply:

- Dependent scorecards are displayed indented under the parent scorecard.
- There are no restrictions in the number of hierarchies displayed in the list of scorecards. This means, you can have access to multiple levels of hierarchies for any scorecard. The access granted to you by the system administrator through the

security module will determine the scorecards you have access to.

- All the branches with dependent scorecards have a collapse and expand icon, so that users can have a summarized or expanded view of the scorecards. This may be especially useful for cases in which the list has a large number of scorecards.
- You may have access to one or more scorecards within a hierarchy, but if you have restricted access to a parent scorecard, the branch with the missing parent might not display indentation. Instead, it might display a plain list of scorecards.
- To facilitate navigation in the List of Scorecards, use Focus in a particular branch or Search for a particular scorecard. This functionality is described below. There are several elements in the List of Scorecards window that facilitates the interpretation of the content.

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

List of Scorecards Window

Search

Search

[Expand All](#) | [Collapse All](#)

Focus Name	Owner	Additional Information Details
Scorecards		
Vision Enterprises		Used for standard demo script. Full Functionality
E-Business Transformation Scorecard		Full functionality demo, Oracle's \$1B savings strat
ABC Company	Ray, Ms. Amy	Example used in BSC.G training
ABC Suppliers		To demo filtering by Dimension at Scorecard Level
Vision Gross Profit Strategy		Scorecard to use in Custom View portlet examples
Aerospace & Defense Scorecards		
Manufacturing	Tucker, Mr. William	
Communications Sector Scorecard		
CPG Sector Scorecards		
Financial Sector Scorecards		

For each scorecard, you can view the following information:

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

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

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

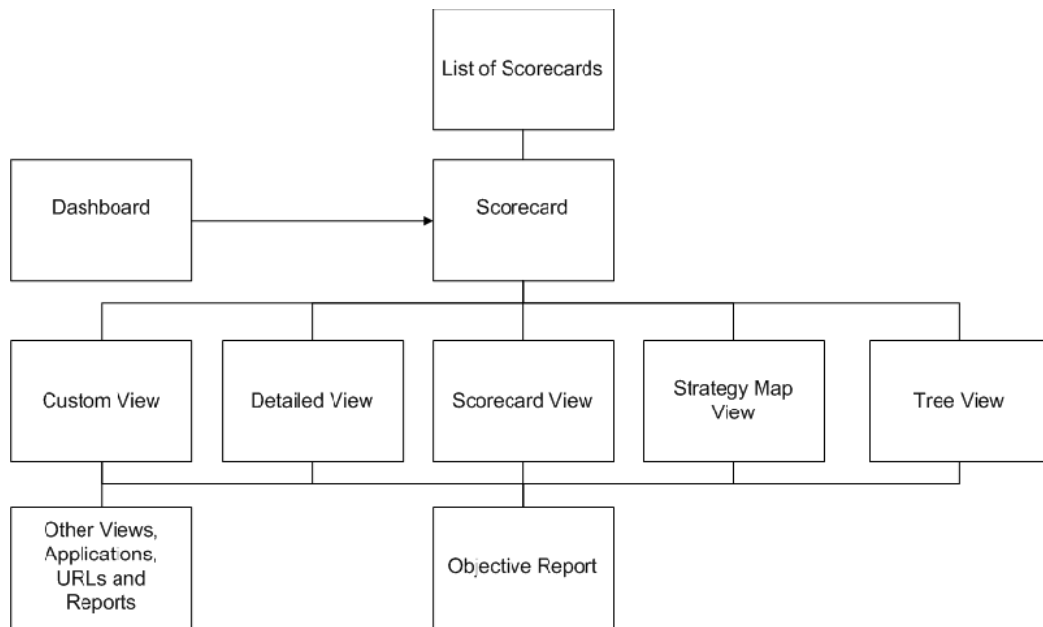
The number of scorecards that are displayed in the list of scorecards is based on the maximum number of objects profile value established for the system. This number is defined in the FND: View Object Max Fetch Size profile option. The default value is 200. Consult your system administrator for more information on this limit.

To locate a particular Scorecard, enter a search criteria using %, if required. Balanced Scorecard will list all scorecards meet the search criteria and to which user has access. This is regardless of the scorecard hierarchy in which they are located.

Scorecard Views

You can view scorecards using the following scorecard views:

- Custom view, page 2-5
- Detailed view, page 2-6
- Scorecard view, page 2-7
- Strategy Map view, page 2-8
- Tree view, page 2-9



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

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

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

Custom View

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

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

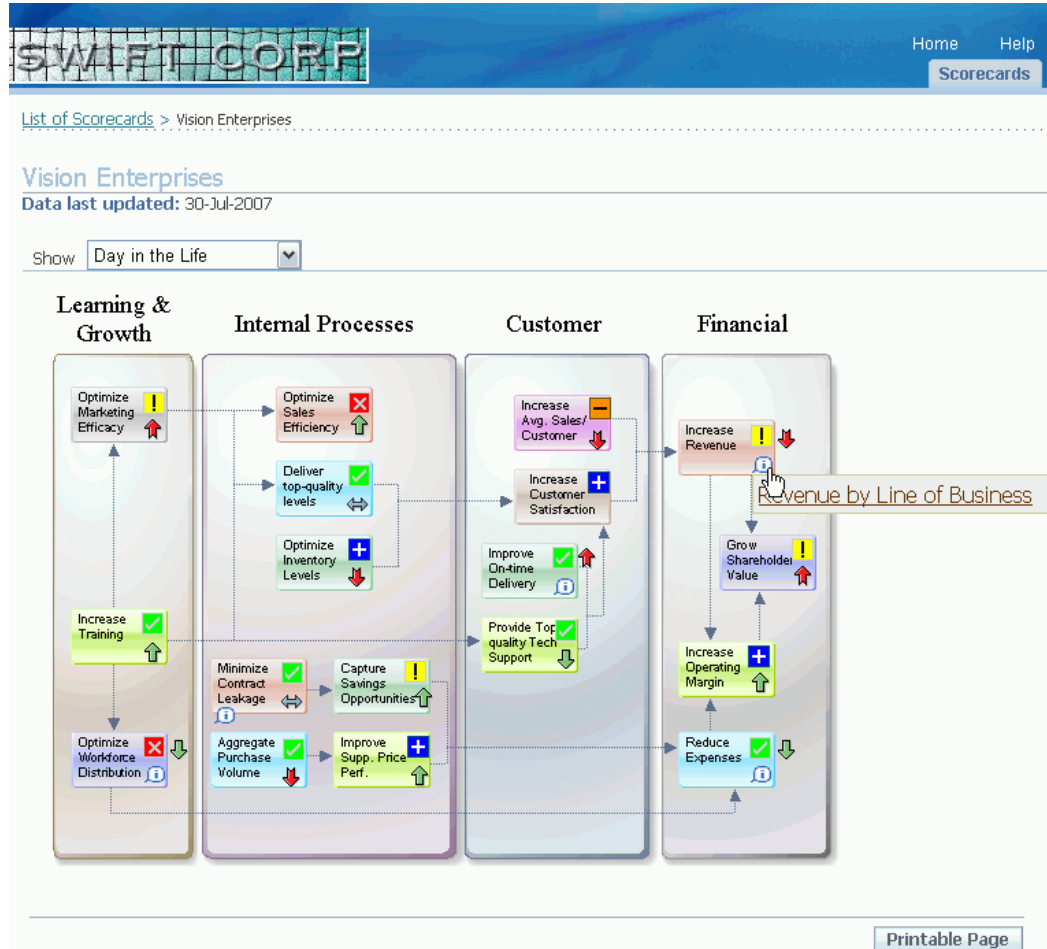
- **Hot spots:** Link to an objective or a KPI.
 - **Alarms:** Represents the performance of an objective or KPI. It is also a link to an objective or KPI.
 - **Trends:** Represents the drift in actual value of a KPI over a previous period. It is also a link to an objective or KPI.
 - **Detailed information on KPIs:** Shows actual and change data for the KPIs associated to the custom view.

Important: The custom and detailed view are the only views that show preseeded KPIs associated with the scorecard.

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

For more information about custom views, see: *Oracle Balanced Scorecard Administrator Guide*.

Custom View with Launchpad Example



Detailed View

The detailed view displays the underlying data for each objective and KPI. The underlying data includes Actual, Plan, Variation, and Percent of Plan data. You can also view trend for each KPI. Trend shows the change in actual value of a KPI over a previous period. This view enables you to interpret alarm and trend calculation for each objective and for each KPI. The alarms for objectives are based on the KPI color method set for objectives. Hover your cursor over alarms and trends to view additional information.

Note: In the Detailed view, for an objective that is used as a default in the Comparison Graph, the fields that describe the objective may appear blank. This issue occurs because in a Comparison Graph, the color can be expressed as a color condition, not as a numeric figure.

Detailed View Example

Objective Group	Objective	Color	Trend	Actual	Plan	Variation	% of Plan
Maximize Sales Growth							
Realize E-Business Shareholder Value							
Vision Gross Profit Strategy	Optimize Inventory Management	+	↓	\$ 88.4	\$ 100.0	-\$ 11.6	88.38%
	Inventory Value:WIP	+	↓	\$ 88.4	\$ 100.0	-\$ 11.6	88.38%
	Inventory Value:In Transit	-	↓	\$ 246.4	\$ 250.0	-\$ 3.6	98.54%
	Inventory Value:On hand	X	↓	\$ 463.7	\$ 461.4	\$ 2.3	100.50%
	Inventory Value:Total	!	↓	\$ 134.7	\$ 150.0	-\$ 15.3	89.80%
	Profit Margin Simulation	✓	↑	\$ 267.6	\$ 268.3	-\$ 0.7	99.73%
	Returns Value	✓	↓	\$ 267.6	\$ 268.3	-\$ 0.7	99.73%
	Profit Margin	✓	↓	2	2	0	122.77%
	Sales	✓	↓	\$ 428	\$ 373	\$ 55	114.85%
	Cost of Goods Shipped	✓	↓	\$ 1,366	\$ 1,107	\$ 259	123.43%

The system administrator can customize the names of the headers for the first two columns in the Detailed View. So, in this view you may see names that vary from the example illustrated above. This is an option that is available only at design mode. If this option is enabled, it affects the column headers of this particular view and they are not replicated through other views. However, this option takes effect for all scorecards.

Scorecard View

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

Scorecard View Example

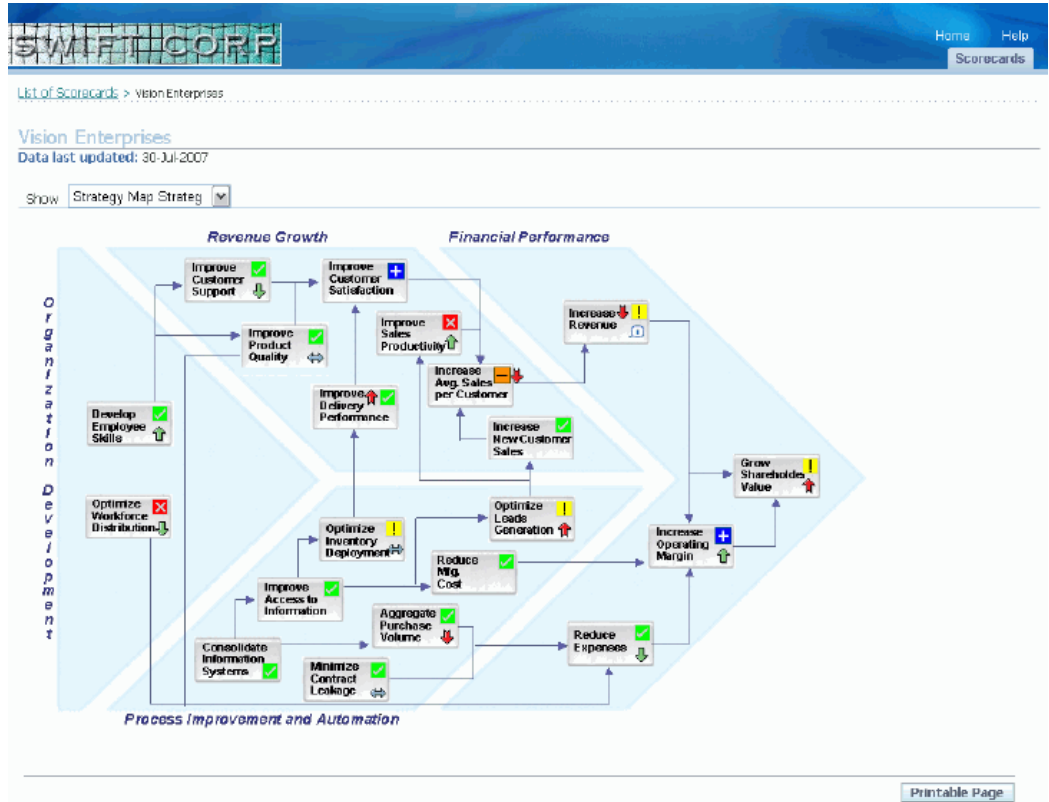
The screenshot displays a web-based scorecard interface for Swift Corp. At the top, there is a navigation bar with 'Home' and 'Help' links, and a 'Scorecards' button. Below the navigation bar, a breadcrumb trail reads 'List of Scorecards > Vision Enterprises'. The main heading is 'Vision Enterprises', with a sub-heading 'Data last updated: 30-Jul-2007'. A 'Show' dropdown menu is set to 'Scorecard View'. The main content area is divided into three sections:

- Vision Enterprises:** A list of 14 objectives, each with a status icon (arrow, checkmark, or exclamation mark) and a link to the objective details.
 - Increase Operating Margin (blue up arrow)
 - Reduce Expenses (green down arrow)
 - Increase Average Sales per Customer (orange down arrow)
 - Improve Customer Satisfaction (blue plus)
 - Improve Delivery Performance (green up arrow)
 - Improve Customer Support (green down arrow)
 - Improve Product Quality (green double-headed arrow)
 - Optimize Inventory Deployment (yellow exclamation mark)
 - Capture Savings Opportunities (yellow up arrow)
 - Improve Supplier Price Performance (blue plus)
 - Agregate Purchasing (green down arrow)
 - Improve Sales Productivity (red up arrow)
 - Optimize leads Generation (yellow exclamation mark)
 - Remove non Value Activities (green checkmark)
 - Develop Employee Skills (green up arrow)
- Purchasing KPI group:** A summary box containing one objective: Purchasing Compliance (red X).
- Vision Gross Profit Strategy:** A summary box containing two objectives: Optimize Inventory Management (blue plus) and Profit Margin Simulation (green up arrow).

Strategy Map View

The Strategy Map represents the cause-and-effect relationships between the objectives in the scorecard. For example, in the example below, the objectives are organized according to four perspectives: Revenue Growth, Financial Performance, Organization Development, and Process Improvement and Automation. The scorecard designer can use any methodology to show the cause-and-effect relationship between the objectives.

Strategy Map View Example



Tree View

The tree view lists the perspectives or strategic themes, objectives, and KPIs of the scorecard organized into a tree like structure. This view also shows alarms and trends for KPIs and objectives.

Note: The KPI that determines the alarm color and trend for an objective appears with an alarm and trend icon next to the objective.

Tree View Example

	Status	Trend
Maximize Sales Growth		
Realize E-Business Shareholder Value		
Vision Gross Profit Strategy		
Optimize Inventory Management	+	↓
Inventory Value;In Transit	-	↓
Inventory Value;WIP	+	↓
Inventory Value;On hand	✘	↓
Inventory Value;Total	!	↓
Profit Margin Simulation	✓	↑
Profit Margin	✓	↓
Returns Value	✓	↓

Alarms

Alarms indicate the status of an objective or KPI. They show the performance of the objective or KPI, evaluating whether actual data is acceptable, compared to your plan. This enables you to identify data for further analysis.

The alarm status for a KPI is based on how the KPI falls within a set of defined tolerance ranges for the KPI's expected performance.

The objective color method in combination with the KPI performance determines the alarm color for an objective. The available color methods are as follows:

- **Default KPI:** The default KPI determines the color of the objective.
The trend of the objective is the trend of the KPI that is set as default.
- **Worst KPI:** The poorest performing KPI determines the color of the objective. The trend of the poorest performing KPI is the trend of the objective.
If two or more KPIs are equally poor performers, then the first KPI is used to determine the color of the objective.
- **Best KPI:** The best performing KPI determines the color of the objective. The trend of the best performing KPI is the trend of the objective.
If two or more KPIs are equally good performers, then you can view details of the

first of those KPIs in the objective report.

- **Most Frequent KPI:** The most common KPI color determines the color of the objective. The trend of the KPI that is most frequently used is the trend of the objective. For example, if there are five KPIs listed under an objective, the alarm color of two KPIs is red and the alarm color of three KPIs is green, then the alarm color of the objective is green.

In case there is a tie between the number of red, green, or yellow or any other color KPI, then you can view details of the poorest performing KPI in the objective report.

- **Weighted Average:** The weighted average of all KPIs for the objective determines the objective color.

No trend is computed for objectives whose color method is Weighted Average.

You can click an alarm to drill down to a more detailed view of the objective.

For more details about alarm color method, see: *Oracle Balanced Scorecard Administrator Guide*.

For more details about trends, see: Trends, page 2-14.

Alarm Examples

	Unacceptable $\leq 69\%$
	Critical $> 70\% - \leq 79\%$
	Marginal $> 80\% - \leq 89\%$
	Good $> 90\% - \leq 99\%$
	Acceptable $> 99\%$

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

Alarm Status, Icon, and Color Examples

Trigger Example	Alarm Status	Icon	Color
Actual revenue is greater than 99% of plan value. The performance meets or exceeds plan and is acceptable.	Acceptable Performance	Check mark	Green
Actual revenue is 90% to 99% of plan value. The performance less than plan, but still performing well.	Good Performance	Plus mark	Blue
Actual revenue is 80% to 89%, of plan value. The performance is tolerable though less than plan.	Marginal Performance	Exclamation point	Yellow
Actual revenue is 70% to 79% of plan value. The performance is below plan and needs immediate attention to see that the revenue does not go further down.	Critical Performance	Dash	Orange
Actual revenue is less than or equal to 69% of plan value, which is less than the tolerance range and unacceptable.	Unacceptable Performance	X	Red

Trigger Example	Alarm Status	Icon	Color
<p>Actual or Plan revenue has not been provided, hence the performance cannot be evaluated.</p> <p>This alarm also applies when the objective is in prototype mode.</p> <p>If the system is in production mode "No Color" icon label is displayed.</p> <p>Navigate to the objective to view the current status of the objective.</p>	Not Data Available	None	Gray

Triggering Alarms

Alarms are triggered based on the comparison of actual data with budget data. If budget data has not been loaded, alarms are disabled.

The following factors determine how an alarm is triggered.

- System
 - Is the system in production or prototype mode?
- Objective
 - What is the color method that drives the alarm for the objective?
 - What are the dimension object defaults?
 - What is the default periodicity?
 - What are the default calculations?
- KPI
 - What is the Goal Type of the KPI?

- How many colors are used to show KPI performance?
- What are the alarm triggers or thresholds?
- Data
 - What is the percent deviation from the planned value?
 - When was the data last collected?

Alarms by KPI

Alarms for the KPIs are calculated depending on the objective view (graph) type.

Typically the alarm represents how the actual values of the KPI is performing against the plan, given a predefined set of triggers.

- **Trend Graph:** Compares the actual values against the budget values for the last updated period for a given KPI.
- **Comparison Graph:** Alarms for all KPIs in comparison mode are triggered as follows:
 - If *any* dimension object value is unacceptable, the alarm is unacceptable.
 - If *any* dimension object value is marginal, the alarm is marginal.
 - If *all* dimension object values are acceptable, the alarm is acceptable.

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

- **Simulation Tree:** Compares the actual values to budget values for a given node specified at design time by the scorecard designer.
- **Profit and Loss:** The result account for the objective (usually the net profit/loss or net income account).

Trends

Trends indicate the change in actual data for a KPI over previous periods. Trends enable you to analyze the performance of a KPI against predefined goal types. The scorecard designer can configure the following goal types for each KPI:

- Target met above plan
- Target met below plan

- Target met within ranges

Depending on the performance of the actual data of a KPI, trend is represented by any one of the following statuses:

- Acceptable Increase
- Acceptable Decrease
- Unacceptable Increase
- Unacceptable Decrease
- No Change in Data
- No Data Available

Trend Status Example



The following table shows how a trend status is calculated. The trend status for a KPI depends on the measure defined, the goal type set for the KPI, and the actual data for the KPI. The scorecard designer can enable trends for KPIs. You can view trends for KPIs in the Detailed View, Tree View, Custom View, and the objective report data table. For more information about configuring trends, see: *Oracle Balanced Scorecard Administrator Guide*.

KPI Goal Type	Current Value of KPI	Trend Status	Color and Icon
Target met above plan	More than previous period (Trend > 0)	Acceptable Increase	Green arrow pointing up
Target met above plan	Less than previous period (Trend < 0)	Unacceptable Decrease	Red arrow pointing down
Target met above plan	No change from previous period (Trend = 0)	No Change in Data	Gray double sided arrow

KPI Goal Type	Current Value of KPI	Trend Status	Color and Icon
Target met below plan	More than previous period (Trend > 0)	Unacceptable Increase	Red arrow pointing up
Target met below plan	Less than previous period (Trend < 0)	Acceptable Decrease	Green arrow pointing down
Target met below plan	No change from previous period (Trend = 0)	No Change in Data	Gray double sided arrow
Target met within ranges	More than previous period (Trend > 0)	Unacceptable Increase	Red arrow pointing up
Target met within ranges	Less than previous period (Trend < 0)	Unacceptable Decrease	Red arrow pointing down
Target met within ranges	No change from previous period (Trend = 0)	No Change in Data	Gray double sided arrow
Any of the above mentioned types	Not available	No Data	Gray rectangular box

The trend value for a KPI is calculated for the KPI's last update period. The trend status compares the current value of a KPI to the value of the KPI in the previous period and validates the value against the KPI goal type.

Note: You cannot view trends for preseeded KPIs.

Common Dimensions

User get a sense of the overall performance and status of the organization, goal, or perspective represented at first glance in the scorecard view. At times, the user can just focus on evaluating the overall status and performance of objectives for various dimension object members. This functionality is known as common dimensions. This option is available only if the dimensions are common to all the objective within a scorecard. The common dimensions, where applicable, show up at the top of the scorecard view. They apply to all scorecard view types.

To evaluate the performance for the same objectives:

- Select a value for the common dimension object. The children values will be filtered

accordingly.

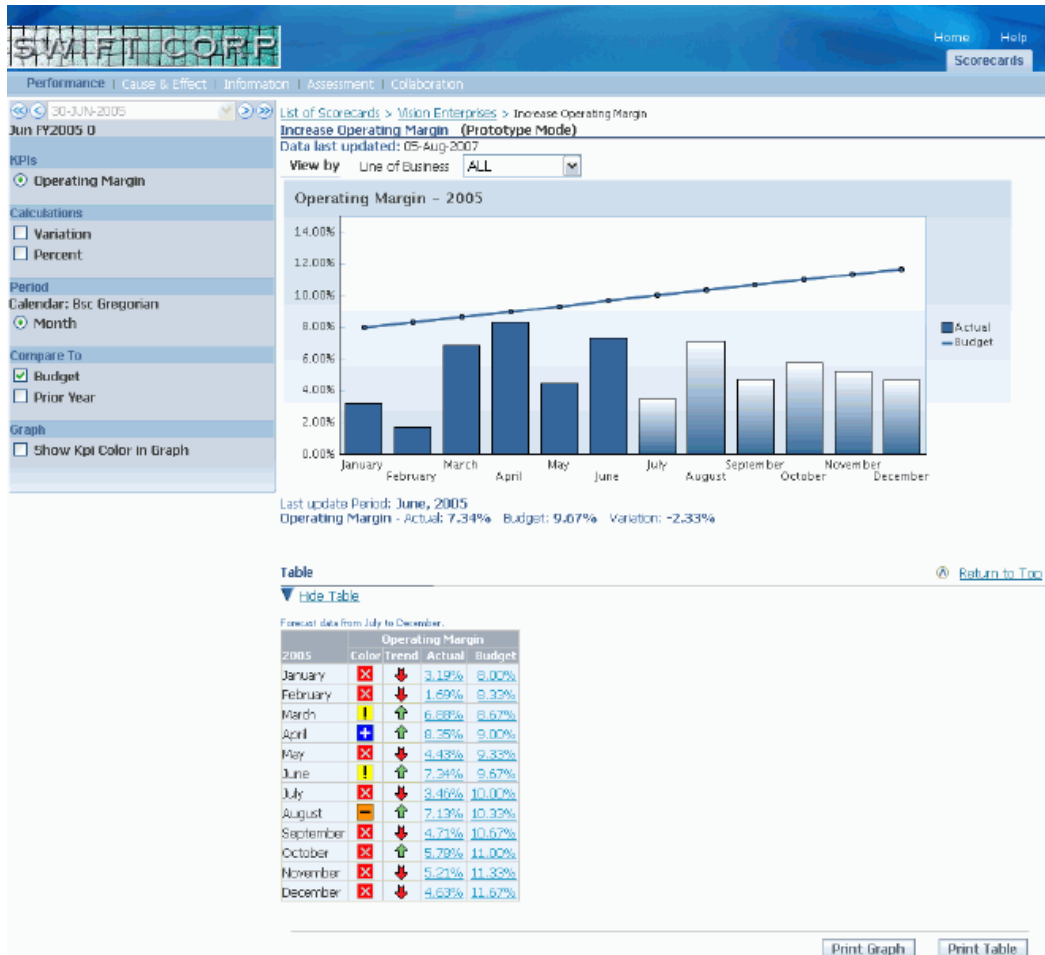
Notice that the alarms and trends change according to your selection.

- Select a value for subsequent dimension objects as required.

Objective Report

The objective report provides detailed information on an objective, allowing user analyze the KPI's performance related or associated to the objective. To drill to this report, click on the objective in any scorecard view. The objective report also enables the user to view data for previous years, if available.

Objective Report



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

Use the navigation aids provided to view data for previous periods. The arrows provided enable you to navigate through previous years.

Note: If the Period To Date calculation is enabled, you can select the calendar period that you want to view data for. See: Calculations, page 2-22.

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

- **Cause and Effect Matrix:** Shows how this objective affects and it is affected by the performance of the related objectives.
- **Information:** Describes additional information about the objective, how to interpret

the formulas and calculations, the functional owner(s) of the objective and its data and provides links to other related content. It also provides information on the alarm color method, the tolerance range (predefined set of triggers) for each color, and other related information on color alarms. This functionality can be seen by all users with access to the objective but updated only the system administrator.

- **Assessments and Collaborations:** Enable the objective owner and users to enter qualitative information about the objective performance for a given period.

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

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

KPI Options

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

KPIs and KPI Options

30-JUN-2004

Jun FY2004 0

KPIs

Revenue New Customers

Calculations

Variation

Percent

Cumulative Year To Date

Year To Year Growth

Period

Calendar: Bsc Gregorian

Year

Quarter

Month

Compare To

Budget

Prior Year

Display Options

Forecast

Graph

Show Kpi Color in Graph

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

- **KPIs:** The KPIs that are used to calculate the objective performance. KPIs are either preseeded, or they are created by the scorecard designer.
See: KPIs, page 2-21.
- **Calculations:** The calculation that is used to calculate the objective performance. Some calculations can be combined with others to create a complex performance calculation. For example, if you select Variation, Percent, and Year to Date, you can view the Year to Date variation in percentage. The Percent and Growth, Year to Date, and Year to Date Growth cannot be combined with other calculations.
See: Calculations, page 2-22.

- **Period:** The period frequency (also referred to as periodicity) that is used to calculate the objective performance. For example, you can choose to calculate the performance KPI weekly, monthly, or yearly.
- **Measures (also called Data Series):** The measures or Data Series options enable you to select separate data series for each KPI. You can display sales and percentage of availability, or both of these, and plot them against several compare to. Measures or Series options can also be used to show data correlations among multiple trend lines. For example, plotting advertising against sales to see if they are related.
- **Compare To:** The value that is used to calculate the objective performance. For example, you can compare actual data against budget, plan, prior year, competition, or industry average data. The default compare to value is the plan or budget, which drives the alarm for the objective.
- **Display Options:** The display options are used to calculate the objective performance. For example, you can compare actual data against the forecast value.
 - Note:** Display Options is available only if one of the objective KPIs is associated with a display option.
- **Graph:** You can view the performance of a KPI, in the objective report, as a trend graph for a specified period of a year.

KPIs

KPIs are calculations or metrics that are either preseeded by Oracle Applications or created by the scorecard designer. You can either create KPIs or use KPIs provided with Oracle Applications.

Custom KPIs: Any KPI that you create using Oracle Balanced Scorecard is called as a *custom KPI*. For more information about custom KPI, see: *Oracle Balanced Scorecard Administrator Guide*.

The scorecard designer configures goal types, trends, and alarm colors for custom KPIs. You can view trends and alarms for KPIs only if the scorecard designer enables trends and alarms for KPIs

Preseeded KPIs: KPIs provided with Oracle Applications, for example, Oracle Daily Business Intelligence are called preseeded KPIs.

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

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

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

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

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

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

Calculations

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

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

- **Variation:** The amount that actual results vary from the compare to value.
- **Percent:** The actual results as a percentage of the compare to value.
- **Cumulative YTD:** The cumulative actual results for the current year. This calculation accumulates actual data from the first day of the year to any point in time in the year. In the objective view for balance accounts (such as Total Assets), Cumulative YTD will be disabled because it does not apply.
- **Cumulative QTD:** The cumulative actual results for the current year presented by quarter. This calculation accumulates actual data from the first to the last quarter of the year. For instance, the accumulated figure of sales from Q1 to Q3 versus the same figure in the prior year for the same quarters. In the objective view for balance accounts (such as Total Assets), Cumulative QTD will be disabled because it does not apply.
- **YTD Growth:** The current period versus the last period of the prior year (final results for the prior year). For example, March 1999 is compared to October 1998, the last fiscal month of the prior year.
- **YTY Growth:** The growth between the current period and the same period in the prior year.
- **To Complete:** The prior period and actual period relative to the plan. The difference between accumulated results and the targeted goal is then distributed equally over the remaining periods.

- **Growth:** The percentage change between the preceding period and the current period.
- **Contribution:** The amount that each data dimension object element contributes to the total results for that dimension object. This calculation is available only for comparison graphs.
- **MAT:** The moving average for the last twelve months.
- **Data Variation:** The amount of variation between any two series in the same period is calculated. This calculation is used for multiple bar objectives only.
- **Period to Date:** Period to Date calculations enable you to compare data in one period with another period, based on an "as of date."

Period to Date Calculations

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

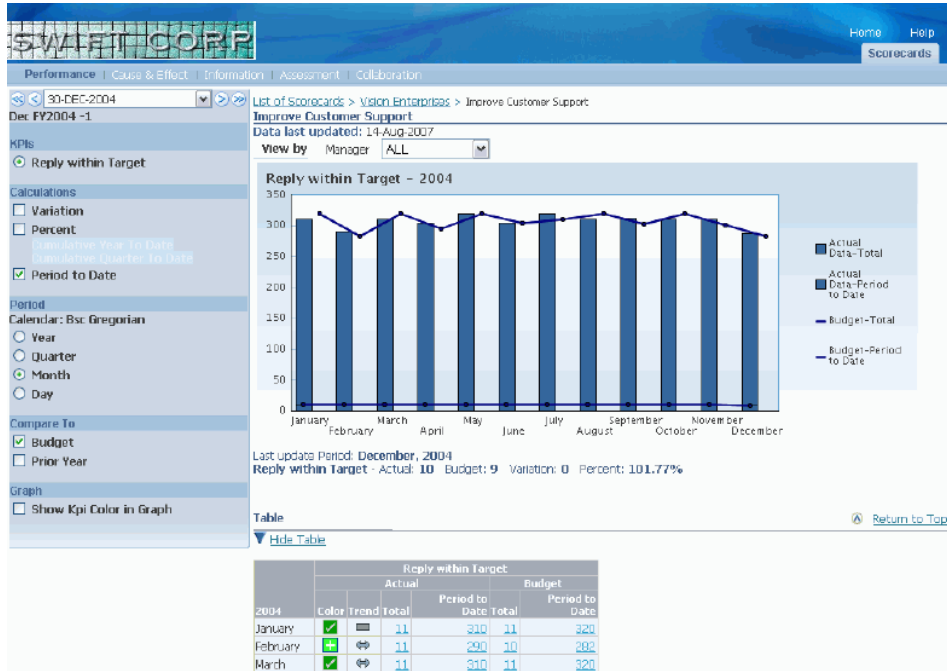
However, if the periods that are being compared are of different lengths, then the system identifies the number of days that are left in the period and uses that to calculate the period to date. For example, when the as of date is July 10, the period has 21 days remaining. When you compare that data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

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

The following rules apply to period to date calculations:

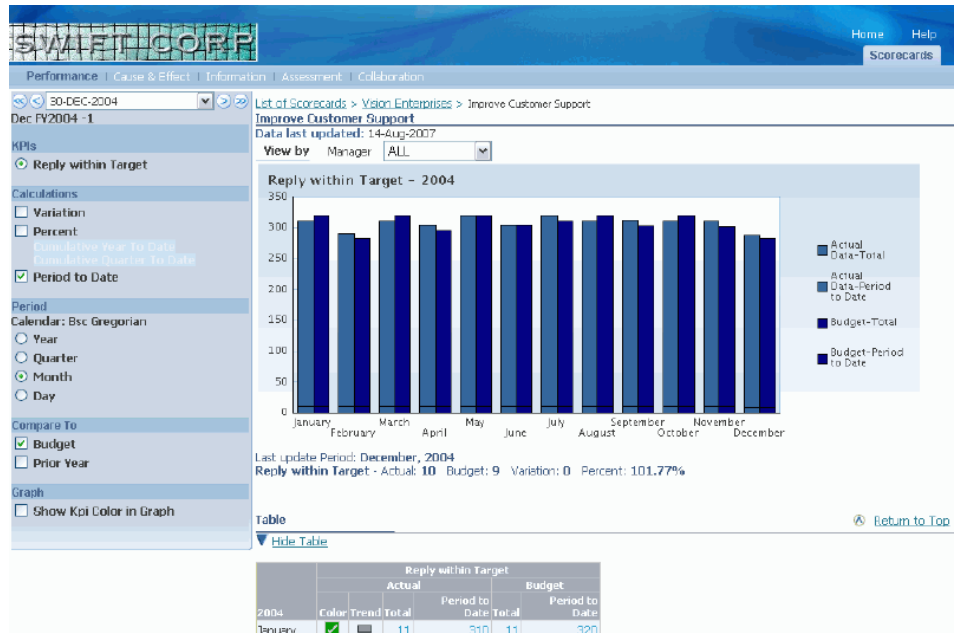
- Period to Date can be calculated only if data for the objective is collected on a daily basis.
- Period to Date cannot be selected in combination with any other calculation.
- The default as of date for the Period to Date calculation is either the current system date or the most recent date that has actual data.
- In trend graphs depending on they type of series:
 - In bar graphs, Period to Date values are shown as a line over the bar graph.

Bar Graph with Period to Date



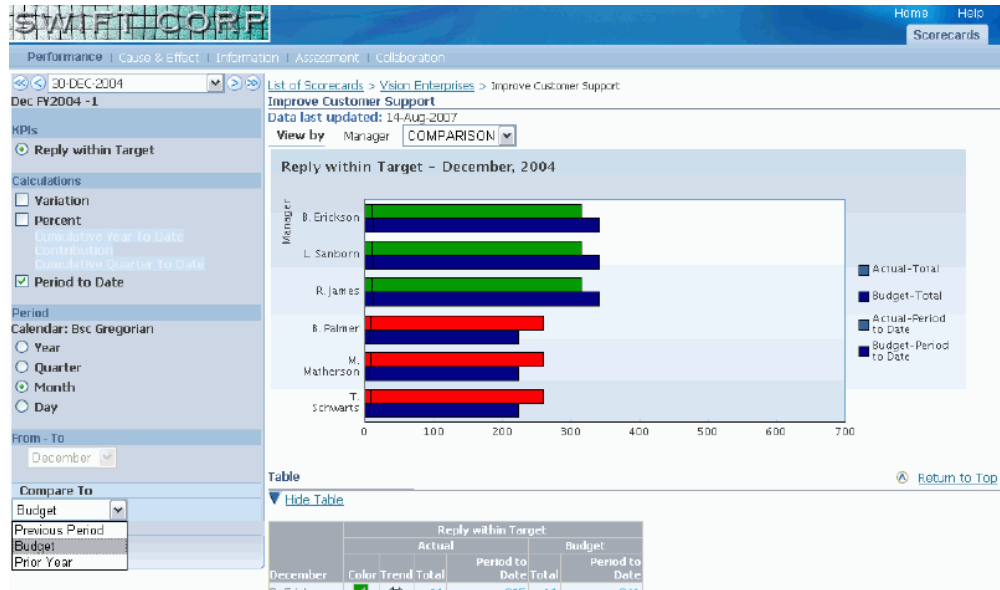
- In line graphs, a second line of the same color illustrates the Period to Date values.

Line Graph with Period to Date



- In comparison graphs, when Period to Date is selected with a compare to value:

Line Graph with Period to Date and Compare to Value



- The compare to value will appear as a second bar. A marker over the bar will indicate the Period to Date value against the total current value.
- In the case of multiple series graphs, only one benchmark can be selected when Period to Date is selected.
- Benchmarks in Comparison Graphs appear only if Period to Date calculation is selected.
- In a comparison graph, the Benchmarks values are: Prior Period, Prior Year, Budget, and any other benchmark enabled for the measure.
- You can select only one KPI and one compare to value for Period to Date calculations.
- In the table, period to date data will:
 - The data that is compared must be based on the same unit of KPI.
 - Period to Date is enabled regardless of the numeric format defined for the measure.
 - Two different columns of data will appear for each series. The data table contains two columns: Actual and Prior Year. Then two columns appear under actual and two columns under Prior Year. The first column shows the Total current value, while the second shows the Period to Date value.

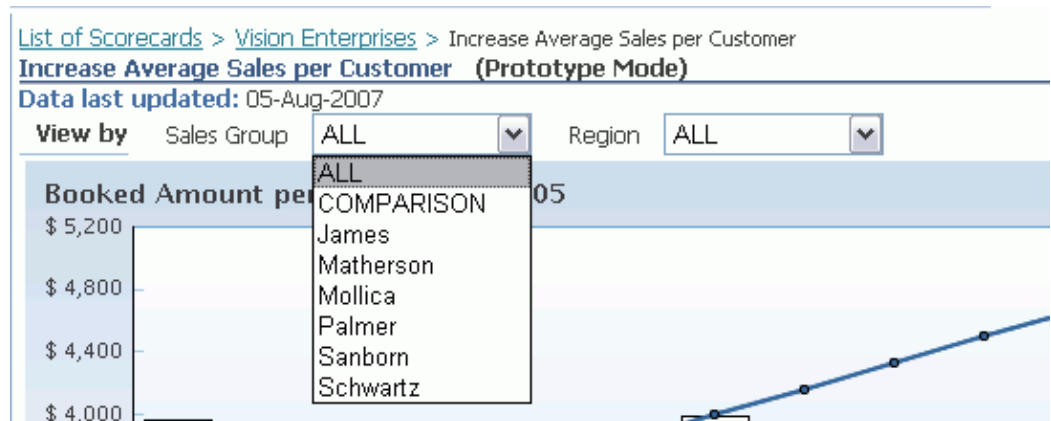
- Period to Date does not apply to special graph types such as Pie graph, Profit and Loss graph, and Simulation Tree graphs. Simulation Tree indicators only accept Year-to-Date calculation.

Dimension Objects (View By Options)

Dimension Objects, also known as View By options are similar to KPI options in that they enable you to change the data that is displayed on the objective report. A dimension object enables you to narrow the focus of your analysis by either slicing and dicing data for more granular level information, drilling down into data for additional periods, or drilling across reports.

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

Dimension Objects



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

Graphs and Other Display Options

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

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

- **Square:** Actual data
- **Line or Square:** Budget data

Note: The scorecard designer can represent budget data either as a line graph or as a bar graph.

- **Line:** Prior year data

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

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

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

The scorecard designer can also specify the number of periods that are displayed.

Trend Graphs

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

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

Trend graphs display one bar for each period, with a number of periods defined by the scorecard designer upto a maximum of the number of periods in a year. For example, if the period type is Week, the trend graph could display upto 53 weeks of data. Scorecard Designer users will define the number of periods to be displayed based on the business requirements and how many periods want to focus user attention on.

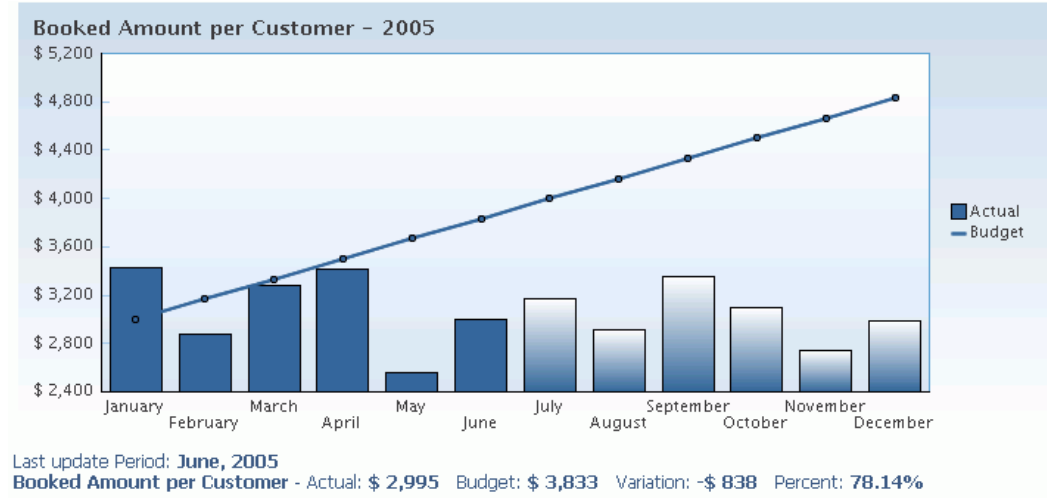
The information line below the trend graph summarizes information for the last updated period in the objective. The line is updated whenever new actual data is uploaded. The information line above the trend graph summarizes information for the last date data was uploaded for the objective (if in production mode) or last date when Scorecard Designer changed the objective definition.

- **Prototype Mode:** An objective is in prototype mode when the objective is defined and configured but not complete. The Scorecard Designer or Administrator must implement the objective to change it from prototype mode to production mode.

An objective in prototype mode can be recognized by the *Prototype mode* label showing beside the Objective name in the Objective Report page.

- **Production Mode:** An objective is in production mode when the objective is complete. The objectives in production mode will not show the "Prototype" label besides the objective name in the Objective Report page.

Line in Trend Graphs



The line displays the following data.

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

When multiple data series is selected, one line will appear for each measure or KPI associated with the series.

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

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

Note: The information line does not display variation and percent if no variation and percent are defined for the KPI.

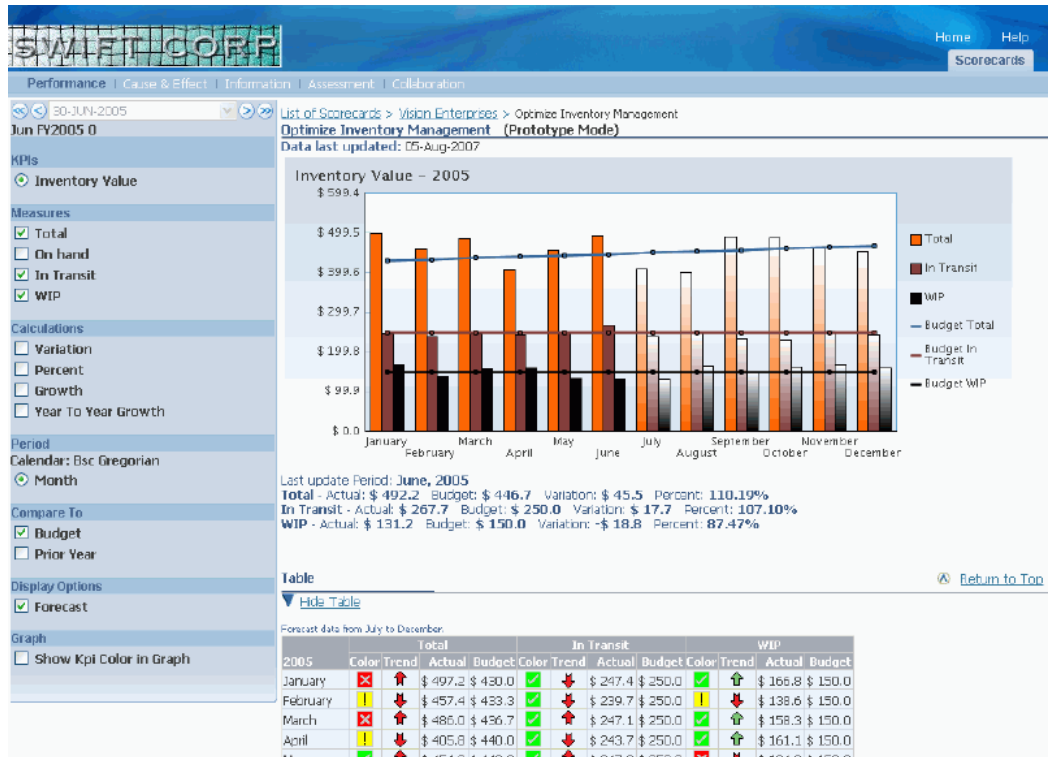
Single Bar Trend Graph



In the preceding figure, a single bar trend graph is used to show the number of customer issues being escalated against the estimated forecast values. Actual escalations are shown from January to June, forecasted escalation are shown from July to December, and the compare to value, budget is shown as the trend line across the bars.

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

Multiple Series Trend Graph

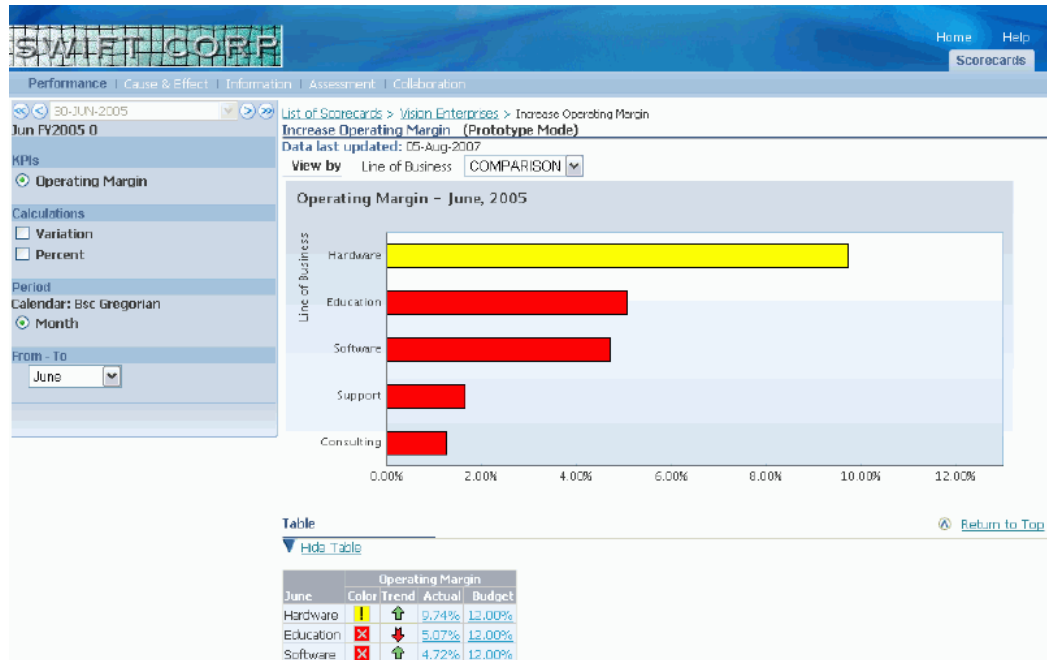


In the preceding figure, a multiple series trend graph shows Total inventory, In Transit inventory, and Work In Progress (WIP) inventory against the inventory forecast.

Comparison Graphs

Comparison graphs compare the objective performance against a plan or budget for a single period showing the alarms according to the alarm triggers and methods defined for each KPI. Comparison graphs allows you to compare only one KPI at a time. You can view comparison graphs in either bar graph or pie chart format.

Bar Graph



Comparison charts will allow you to review the performance of each element for a specific period (by default the Last Updated period). You can choose another period to compare by selecting the corresponding From-to Period.

The elements in the comparison graph will be listed in descending order based on the actual value (not performance), however this order can be changed by the scorecard designer while designing the objective and can be different for each dimension object.

The performance of each element in the comparison bar graph will be represented by its alarm color. The performance is based on the actual or each element against its plan. The same alarm is displayed in the data table.

Important: Comparison bar graphs for Period To Date calculation will not show the alarm color in the bars, since they show more than one value at the same time.

Pie charts are only available for comparison graphs. As the pies show a certain number of elements represented in slices, the pie will not show the alarm, as in the bar graph. However, the data table will continue showing the corresponding alarm.

You can only view a pie chart if no calculation method is selected or if the following calculation methods are selected:

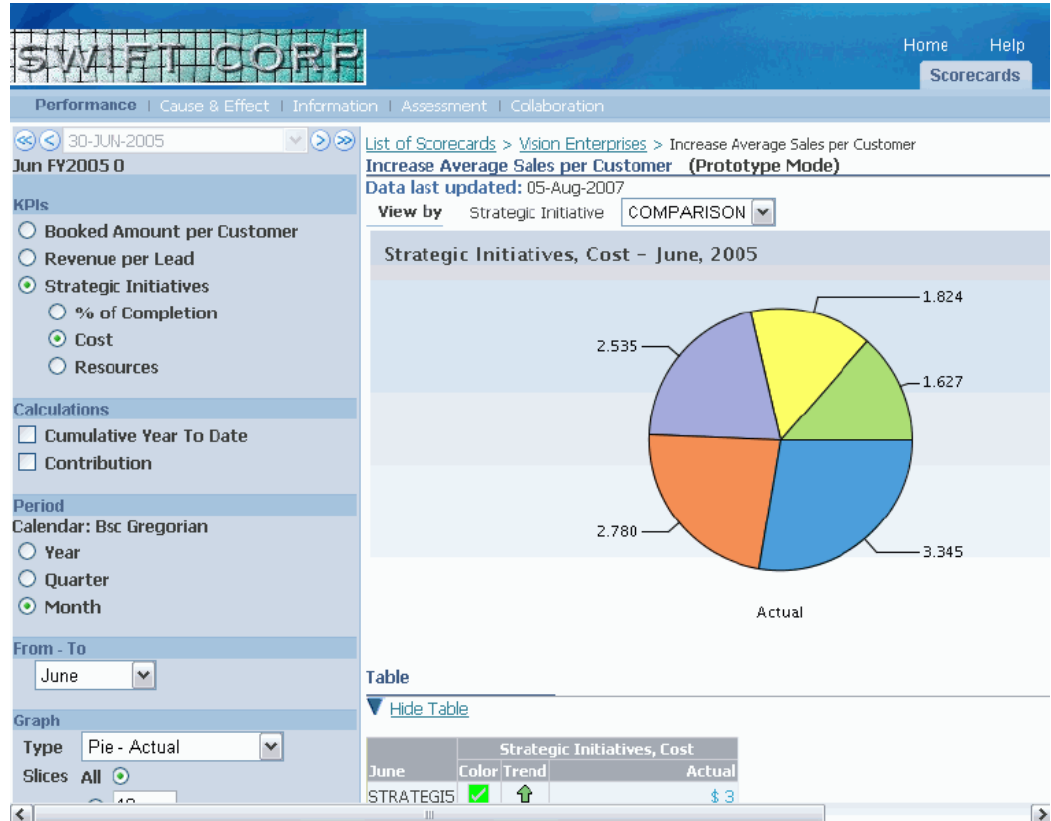
- Contribution
- Year to Date

- Quarter-to-Date

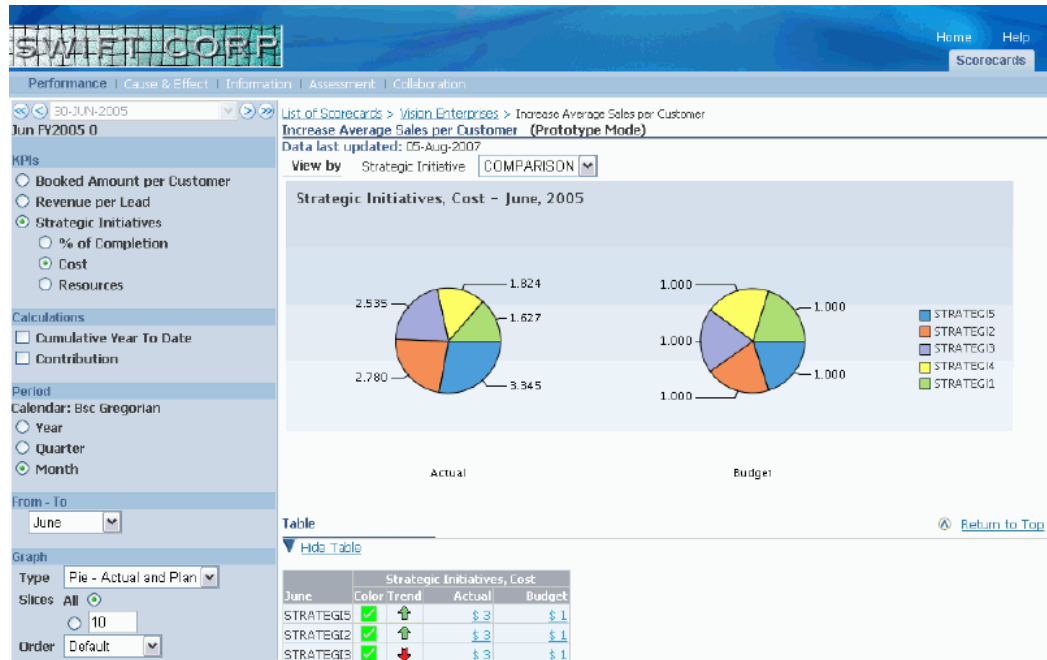
Pie charts can display actual, or actual and plan data only. They cannot display other display options.

Pie charts are available for KPIs in the form of numeric format. KPIs using percent format data or ratios cannot be displayed in pie charts. Also formulas with aggregation method different to SUM cannot be displayed in pie charts.

Pie Chart with Actual Data Only



Pie Chart with Actual and Plan Data



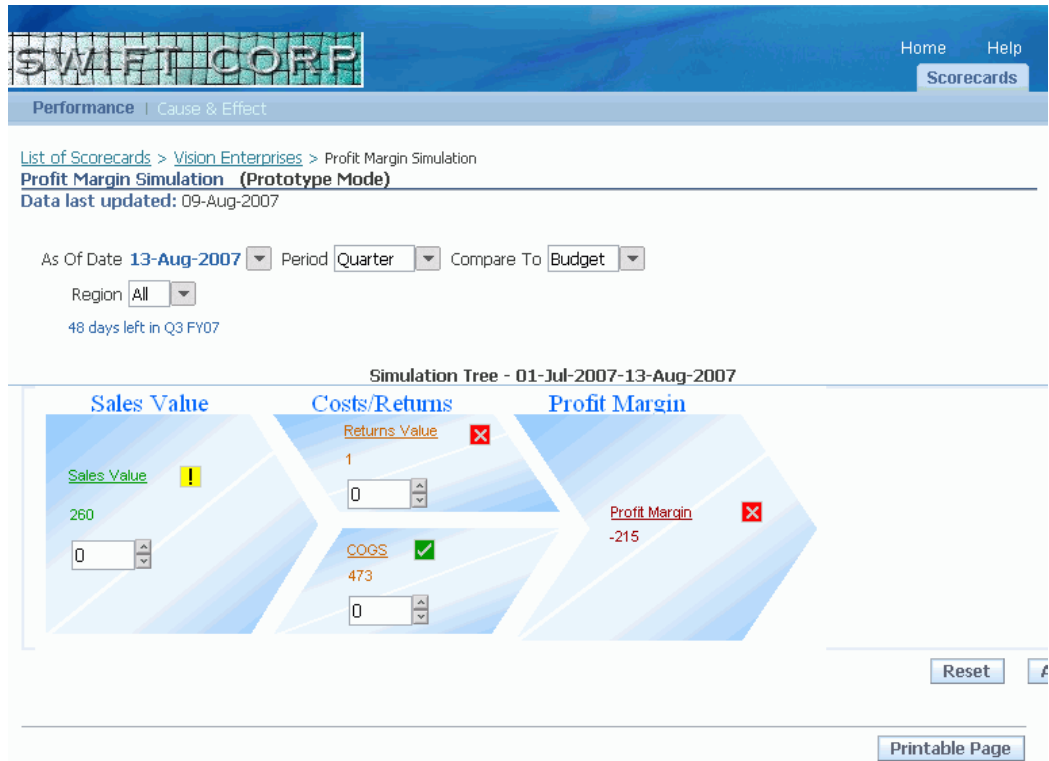
Other Display Options

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

Simulation Trees

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

Simulation Tree



In the preceding simulation tree example, each box (node) in the simulation tree represents a KPI that is driven by a measure or a formula. Formula or Calculated KPIs comprise of formula expressions between two or more KPIs. By increasing or decreasing a value in the box (node), you can determine how that KPI affects other KPIs and see how it affects performance.

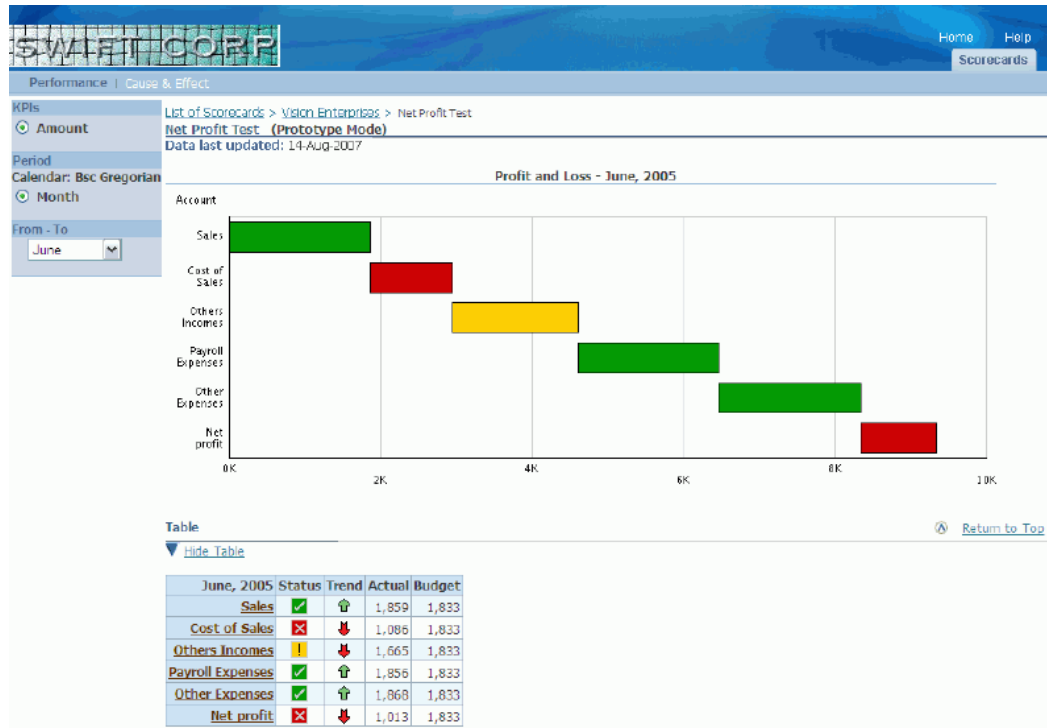
You can reset values to their original state and print the results of different scenarios; however, you cannot save your simulation tree scenarios.

The alarm status of the default node determines the color of the simulation. You can drill down to a trend graph for each KPI by clicking the KPI or the alarm color.

Profit and Loss Bar Chart

A Profit and Loss bar chart shows how financial accounts contribute to a net account, such as Net Profit or Net Income. The net profit KPI drives the alarm color of the profit and loss performance.

Profit and Loss Bar Chart



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

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

Table

The table displays a maximum of 12 periods, regardless of the period that is selected. For example, if the period is Week, only 12 weeks are displayed, instead of 52. You can click Show Full Table to view the complete the set of periods. The scorecard designer determines the default number of periods displayed. The table also shows trends and alarms for custom KPIs. For more information on trends and KPIs, see: Trends, page 2-14 and KPIs, page 2-21.

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

Cause and Effect Matrix

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

Cause and Effect Matrix

The screenshot shows a web interface for 'SWIFT CORP'. The top navigation bar includes 'Home' and 'Help' links, and a 'Scorecards' button. Below the navigation bar, there are links for 'Performance', 'Cause & Effect', 'Information', 'Assessment', and 'Collaboration'. The breadcrumb trail reads 'List of Scorecards > Vision Enterprises > Increase Revenue'. The main heading is 'Increase Revenue: Cause & Effect'. The content is divided into two sections: 'The following Objectives affect the performance of Increase Revenue' and 'Increase Revenue affects the performance of the following Objectives.' The first section lists two cause objectives: 'Increase Average Sales per Customer' (indicated by a minus sign icon) and 'Improve Customer Satisfaction' (indicated by a plus sign icon). The second section lists two effect objectives: 'Increase Operating Margin' (indicated by a plus sign and an upward arrow icon) and 'Grow Shareholder Value' (indicated by an exclamation mark and an upward arrow icon).

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

Information

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

- **Definition**

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

- **Formulas**

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

You should include administrative details about how the objectives roll up from period to period, or about how values are aggregated.

- **Strategy**

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

- **Action Items**

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

- **Objective Owner**

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

- **Related Links**

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

- **Color Alarm Information**

Information about the alarm triggers for the objective and KPI. It also provides information about the current alarm status and trend for the objective. In case of objectives whose color method is Weighted Average, you can see more information on the weighted average index and the color and weights for each KPI.

This information can be seen by all users with access to the objective, but only the designer with system administrator access can update it. Generally, these information categories are not updated frequently. The scorecard administrator or scorecard designer is generally responsible for changing this information.

Assessments

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

For example, an assessment can provide an explanation of why an objective under-performed, or why its performance is considered acceptable even if a quantitative measurement suggests otherwise. You can also provide your assessment of how the objective is performing by specifying an alarm and/or a trend status.

Assessments are labeled with the name of the author of the assessments and date. You can optionally specify the period if your assessment refers to a specific period.

Although Assessments are intended for the objective owner, it is not limited to it. Users who are not the objective owner should use the Collaboration window to enter qualitative information about performance.

Collaboration

Any user with access to an objective can use the Collaboration window to enter qualitative information about an objective. Collaborative comments are particularly

useful if several users have access to the same objectives, or when the same objective appears on multiple scorecards.

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

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

A comment as well as an assessment can be updated or removed by its owner or the system administrator user.

Preseeded KPIs in Objective Reports

Objectives and custom views can contain custom KPIs, and also KPIs that come directly from Oracle Daily Business Intelligence modules. The Objectives can now display any KPI, custom or preseeded, as its default KPI.

You may notice some differences when drilling into detailed reports of a custom KPI or a KPI report for a preseeded KPI. For preseeded KPIs, you will see additional color alarm information for all the parameters that influence color selection. These include the default dimension levels that you selected, as well as the View By characteristics of the KPI.

The Tree View can display objective colors that reflect the performance of a preseeded KPI. The KPI displays the same color as the objective. This is based on the parameters you selected when the KPI was added to the Objective.

You can also track the performance of preseeded KPIs using the Viewer application. It is reflected in Balanced Scorecard objective groups, scorecards, and portlets.

Objective View with Preseeded KPIs

For objectives that contain preseeded KPIs, you will see additional functionality in the objective report. The preseeded KPIs interact more closely with the table and with the parameters (Dimension Objects/View By) section. They might have access to other optional sections, such as Related Information.

The basic functionality enhancements that might be present in objective reports that contain preseeded KPIs are:

- **Parameters Section**

The appearance of the Parameters (Dimension Levels/View By) section might be slightly different, depending on the type of dimension levels configured for the KPI. You might see the following new elements:

- **Hide Parameters:** You can select this link to hide the parameters section.
- **Run Button:** You must select the Run button to refresh the graph, table, and related links section once they make a new selection of dimension levels

- **LOV (List of Values):** You might need to select a dimension level. You can select the LOV and you will see a new screen in which you can select the levels you want to appear in the graph and table.

- **Graph Section**

The following active links are disabled:

- Graph trend to comparison
- Comparison graph to trend
- Graph type selection to visualize the comparison as pie graphs

- **Table Section**

The following functionality is available in the objectives data table that contains preseeded KPIs:

- **Links to Drill-down or Drill-across to other Report:** This type of link allows you to go deeper in the analysis of data represented in the table. It can take you to a more detailed report with a more granular level of related information, or just drill down into data for additional periods. The definition of the link is part of the KPI definition.
- **Links to Edit Targets:** If the table displays target data, then the table might have an active link that allows you to edit those targets.

For more information on interacting with data tables that contain preseeded KPIs, see: *Oracle Daily Business Intelligence Implementation Guide*.

- **Related Information Section**

In reports that contain preseeded KPIs, you can access multiple links associated with these KPIs. This information is available on the bottom of the page below the Data Table section. Each related link was predefined by the designer and can take you to any URL or navigate to other reports or KPIs.

To use the Related Information section, you can click on the available section links for each of the KPIs. This feature is part of the defined preseeded KPIs, so it not yet available for custom KPIs in other type of Objectives.

- **Options Available in Objective Page**

You may have several analysis options that reflect preseeded KPIs or custom KPIs in one objective. However, these types of KPIs do not have other sections that exist for custom KPIs, such as periodicity, benchmarks, and calculations, which typically appear on the left side of the objective page, because these options are already part of the definition KPI.

- **Time View By versus Period**

The concept of periodicity is handled in custom KPIs as part of the analytical panel on the left side of the objective report. For preseeded KPIs, this is just another type of dimension object that you can select in your View By section.

Users can select any time or period pre-configured for the KPI by interacting with the View By section of the page.

For more information on how users can interact with objective reports that contain preseeded KPIs, see: *Oracle Daily Business Intelligence Implementation Guide*.

Security Considerations

You should consider the following:

- Even if you have access to an objective, you might not have access to all reports about preseeded KPIs. Therefore, when you try to use the analysis option that contains this KPI, you might get a message that you do not have access.
- Due to security settings, you might have only limited access to a preseeded report. In these cases, you might see disabled links or find links that do not work due to security restrictions. For example, you might see an editing target link, but you might be restricted from applying a change to the target.

Printing

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

The following print options are available:

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

Exporting to Excel

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

You can use the Export to Excel feature, only if it is enabled for the objective.

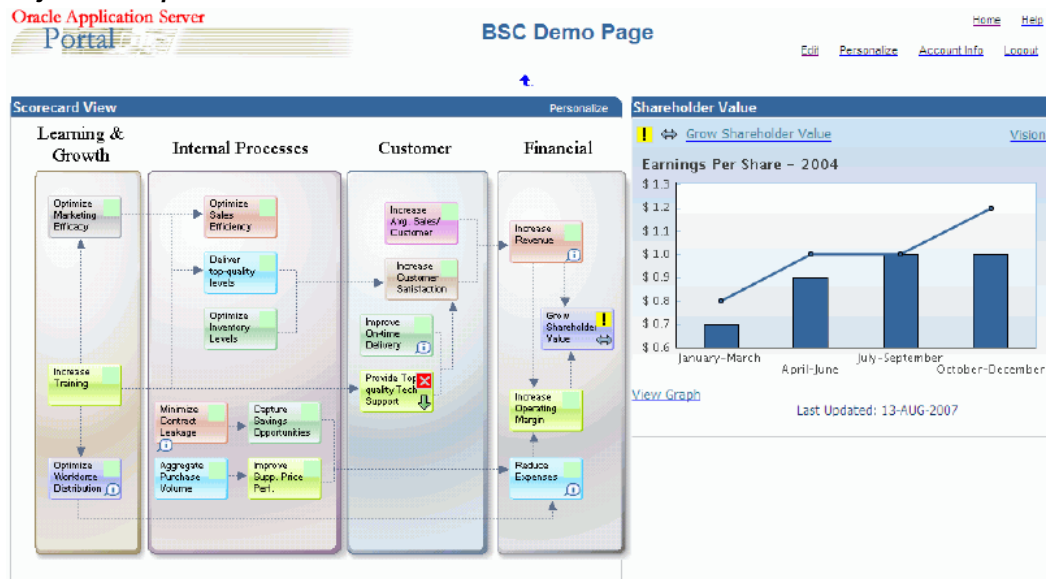
When you export data, all of the actual and projected data for that objective and all of the objective options that are selected are exported.

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

Balanced Scorecard Portlets

You can add one or more of the Balanced Scorecard portlets to your Personal Home Page or Portal: Objective Graph Portlet, List of Objectives Portlet, and Custom View Portlet. These portlets are described in the following sections.

Objective Graph Portlet



Objective Graph Portlet

Use the Objective Graph portlet to display the alarm, trend, and graph for any objective. The portlet displays the KPI graph based on the objective color method.

Note: If the objective color method is weighted average, the portlet displays the default KPI graph.

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

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

List of Objectives Portlet

List of Objectives Portlet

List of Objectives		Personalize			
		Actual	Plan	Variation	% of Plan
Vision Enterprises					
Vision Enterprises					
!	↔ Grow Shareholder Value	\$ 1.00	\$ 1.20	-\$ 0.20	83.33%
!	↔ "Earnings Per Share	\$ 1.00	\$ 1.20	-\$ 0.20	83.33%
Fr_ObjectiveGroup					
✖	↓ Improve Customer Support	9	7	1	116.07%
✖	↓ "Reply within Target	9	7	1	116.07%

Use the List of Objectives portlet to display a list of critical objectives for a particular scorecard. The status for each objective is shown using the alarm and trend. You can also use this portlet to display an additional column, to group the objectives into perspectives or other organized groups, or to view the Actual, Plan, Variation, Percent of Plan of data, trends, and alarms for each KPI.

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

Custom View Portlet



Custom View Portlet

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

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

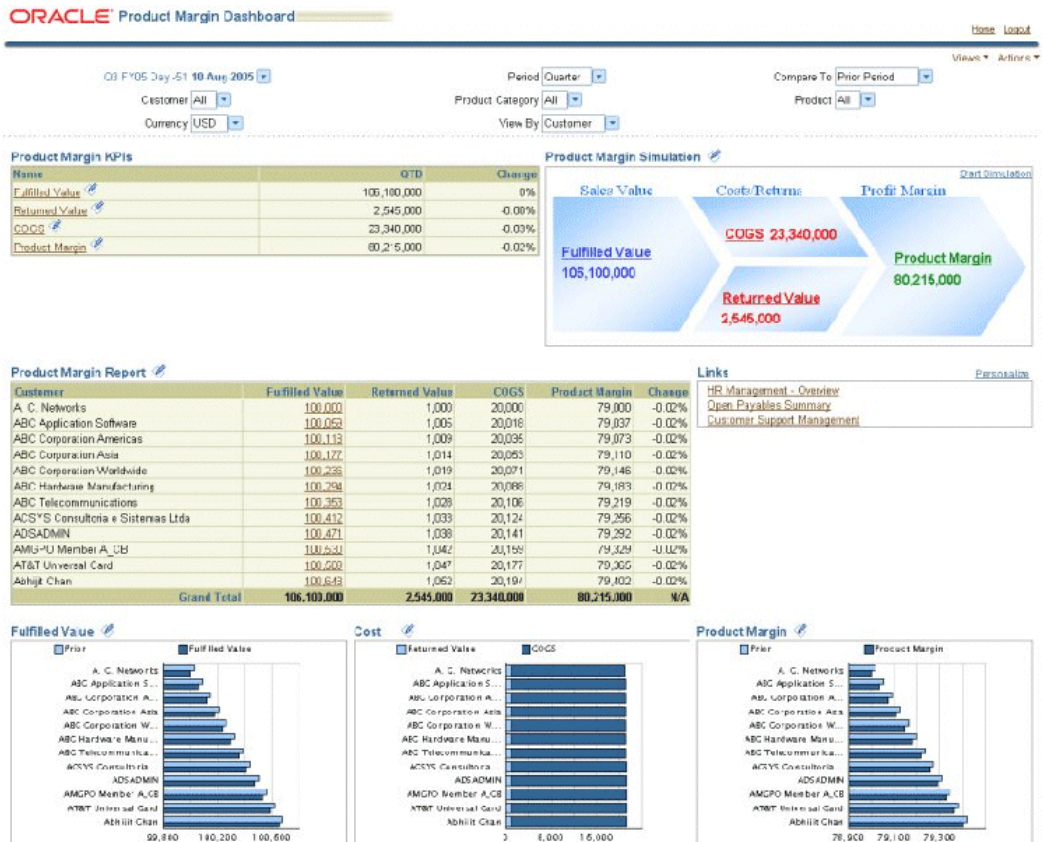
Using Dashboards and Reports

Dashboards

You create a dashboard to meet the needs of a particular management responsibility. For example, the Expense Management dashboard is designed for managers who manage expenses within their supervisor hierarchy.

To access a dashboard, the system administrator must assign the appropriate responsibility to your Oracle Applications user ID. Your Oracle Applications security settings determine the data that you can see on each dashboard. For example, a manager can only view expenses for their subordinates and for the cost centers they are responsible for.

Dashboard



While the content of each dashboard is unique, the basic features and functionality of each dashboard is the same. All dashboards contain the following features:

- Parameters
- Regions
- Links to Reports

All dashboards display the same basic functionality: ability to drill to transactional data, ability to drill and pivot on dimension values, ability to print, email, and start a web conference from a dashboard, and so on.

Related Topics

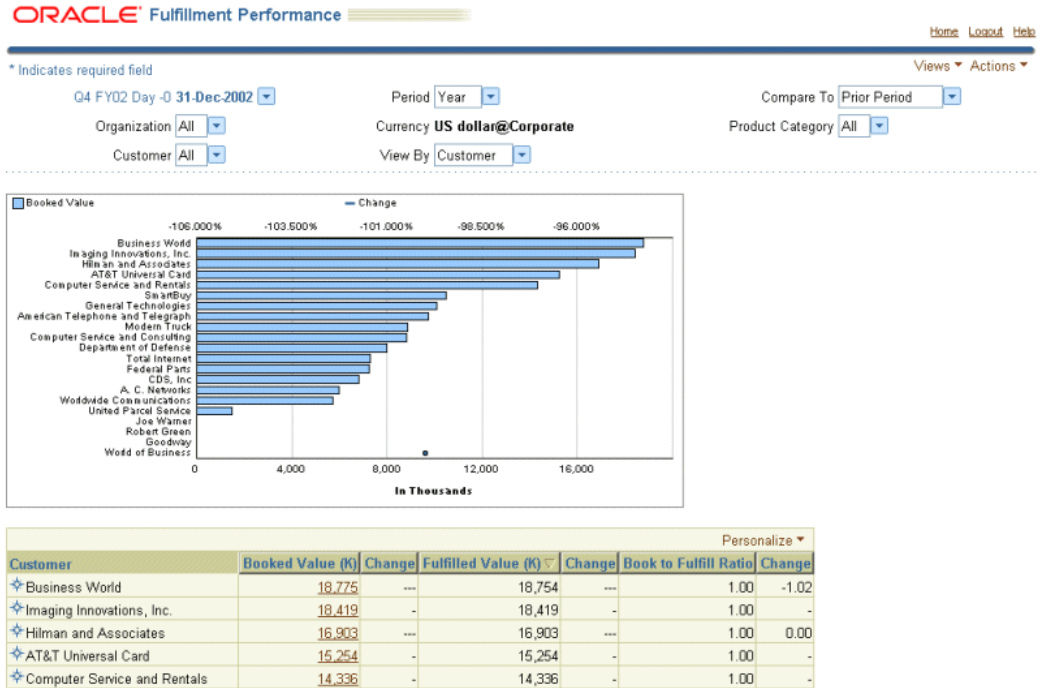
General Dashboard and Report Behavior, *Oracle Daily Business Intelligence User Guide*

Reports

Every table and graph region (and most KPIs) on a dashboard are based on a report.

You can drill from regions or KPIs to the underlying reports by clicking on the linked values and text in the regions. For example, click on the region title to view a summary report, or click on a value in a table region to view a detailed report.

Report



Reports are similar to dashboards and regions, but have the following differences:

- Reports enable you to drill and pivot on values in the first column of the report table. Drill and pivot functionality enables you to view the value by any other dimension, except for time.
- Reports can display more rows and columns of data.
- Reports do not truncate data.
- Report table columns can be sorted.
- Report data can be exported to a Microsoft Excel spreadsheet.

You can personalize the appearance of the tables in each report. Tables are personalized at the user level, so any changes you make will not affect other users. You can also use Actions and Views menus, available at the top and bottom of each report, to access different functionality in a report.

Related Topics

Reports, *Oracle Daily Business Intelligence User Guide*

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