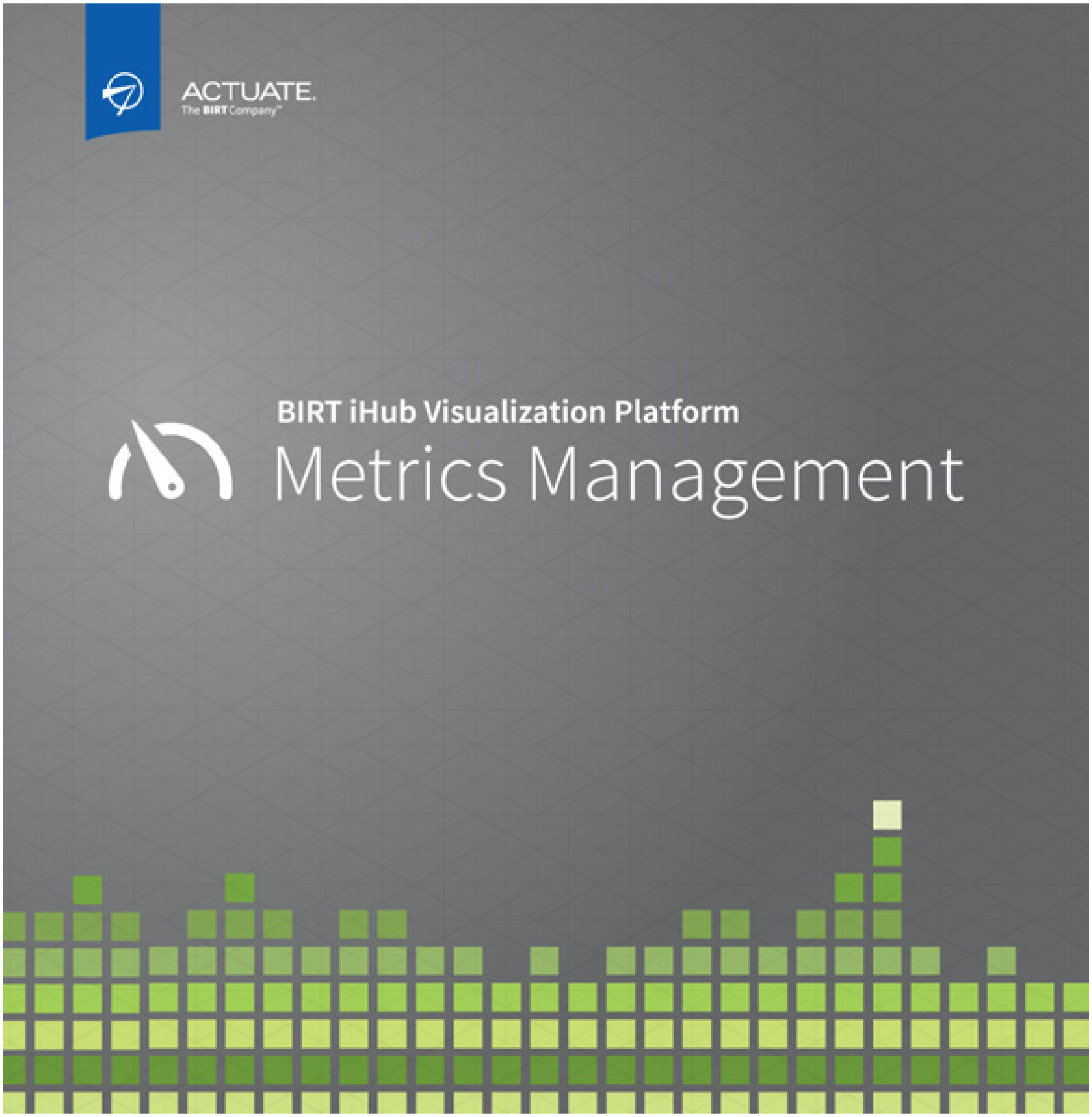


Web User Guide for Metrics Management

Contains information proprietary to:
Actuate Corporation, 951 Mariners Island Boulevard, San Mateo, CA 94404

www.actuate.com

Document No. 131215-2-540331 February 11, 2014

Contents

About Web User Guide for Metrics Management

Web User Guide for Metrics Management provides information about how to implement and best use the features of this performance management software. It provides the user with options regarding the navigation and presentation of information derived from the compiled database in Metrics Management.

Web User Guide for Metrics Management is a document for end users of Metrics Management. In the typical organization, the Metrics Management system specialist creates a preliminary database before the end users begin to work with Metrics Management. There are companion documents that cover installing and configuring the product and working as a system specialist.

Web User Guide for Metrics Management includes the following chapters:

- *About Web User Guide for Metrics Management.* This chapter provides an overview of this guide.
- *Chapter 1. Introducing Metrics Management.* This chapter introduces Metrics Management and the value of a performance management system. The chapter provides an overview of Metrics Management and shows how the basic Metrics Management elements interact to produce performance results.
- *Chapter 2. Using Metrics Management.* This chapter introduces Navigation Pane and the home page, and shows you how to use views, books, maps, dashboards, initiatives, and links. It also explains how to change your preferences.
- *Chapter 3. Working with data.* This chapter describes how to manually enter data and performance commentaries into the system.
- *Chapter 4. Presenting your data.* This chapter describes how to edit and work with initiatives and maps.
- *Glossary.* This chapter consists of a list of terms that relate to Metrics Management.

Chapter

1

Introducing Metrics Management

This chapter discusses the following topics:

- About using Metrics Management as a performance management tool
- About Metrics Management
- About views
- About briefing books
- About maps
- About dashboards
- About initiatives

About using Metrics Management as a performance management tool

Metrics Management is a management tool designed for organizations that want a comprehensive view of their performance, whether that performance be financial indicators, strategic objectives, customer satisfaction, or other business objectives. A successful Metrics Management implementation is one that measures activities that contribute to achieving organizational objectives.

Metrics Management does more than simply measure the number of sales or calls to customer service. Metrics Management can categorize the types of sales or calls to customer service to provide visibility into what is succeeding and what issues need to be addressed. An effective management team wants to know more than what percentage of customers are calling. Managers cannot take the time to inspect the individual call tracking files. Instead, they need to know how these calls can be categorized and analyzed.

For example, suppose a government agency, such as the National Park Service, implements Metrics Management to track the number of general inquiries and complaints. During implementation, the system specialist can set up the program to go beyond reporting the number of general inquiries or complaints. Metrics Management can be set up to track how many people call to ask about available amenities, fees, schedules, and reservations. In addition, Metrics Management can track the number of customers and details about those customers who lodge complaints about fees being too high, trail accessibility, and park hours. These inquires can then be grouped and compared, providing managers with detailed information that empowers them to make decisions based on data about which problems are most critical, which problems affect the largest number of customers, which problems need to be addressed urgently, and which ones fall into the nice-to-have category.

A performance management system focuses on measuring activities that contribute to achieving organizational objectives, not just things that are easy to measure. Remember that “What gets measured gets done.” An effective and properly implemented system can help to promote focus and alignment within the organization, increase communication, and help redefine a forward-looking vision.

About Metrics Management

Metrics Management displays information in various formats such as the view hierarchical structure, the briefing book format, maps, dashboards, initiatives, and performance dashboards. Metrics Management uses these different formats to maximize the flexibility of how users can access information they need. The following sections discuss these display options.

About views

A view is a hierarchical structure that displays the relationship between strategic objectives and performance measures. A view usually reflects an organization's vision, values, mission statement, and strategic plans. The view structure consists of the following primary components: measures, locations, and data. These three components provide a meaningful, hierarchical, customizable view of your data. In Metrics Management there are three types of measures: data, formula, and group. Later in this chapter, we discuss measure types.

Figure 1-1 shows a view where Overall Performance is at the top of the hierarchy, and key strategic elements are at the next level down. The structure cascades downward to include the key performance areas and elements that contribute to your organization's success.

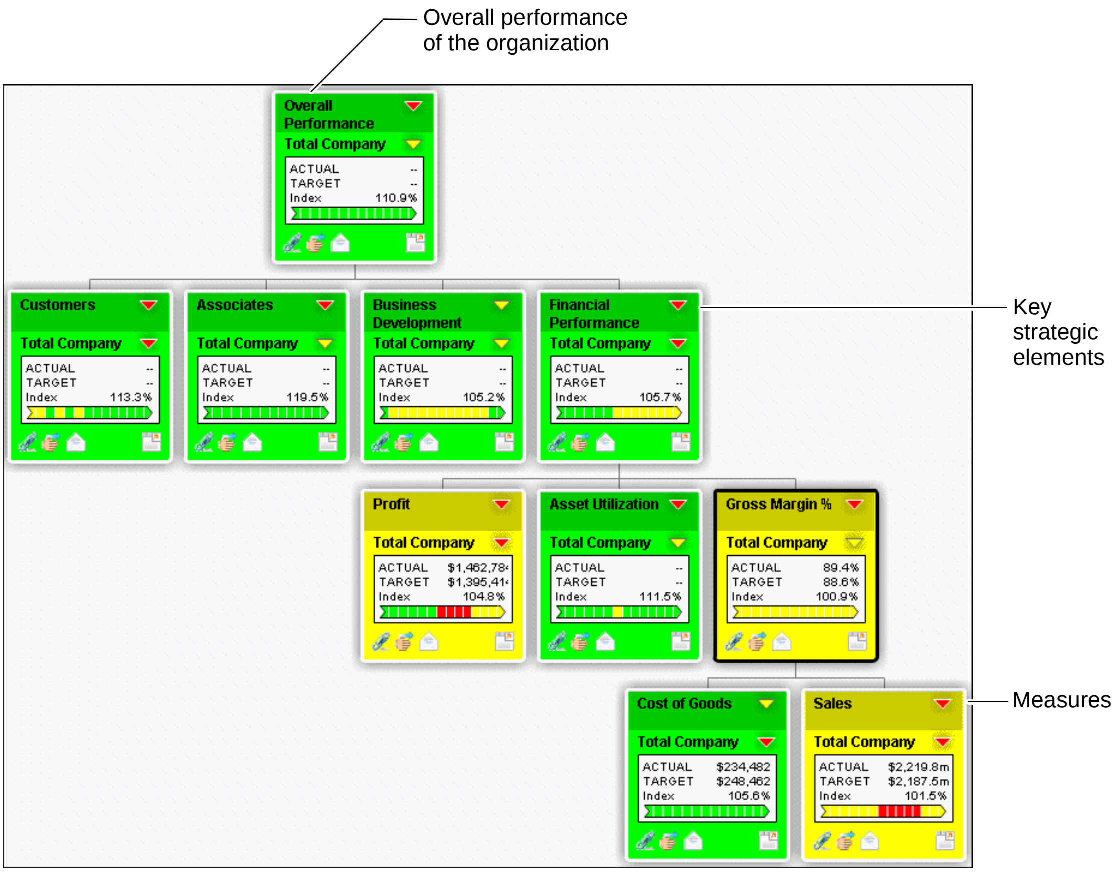


Figure 1-1 View hierarchy

Of course, you can tailor your performance framework to your organizational needs. Within your view hierarchy, you align the measures that track performance of various activities with your overall corporate strategy.

Typically, the view reflects the main concepts behind an organization's vision, values, mission statement, and strategic plans. During the implementation phase, match these overall goals with supporting key performance areas and measures. Additional views then focus on specific or unique aspects of your organization's performance.

After the main view structure is built, a variety of features can enhance the information within the view. These additional features include sorting data measures using elements, such as locations and weights, to garner specific information.

About measures and measure owners

Metrics Management uses measures as performance components that collect quantifiable data. Measures should be linked to your organization's strategic objectives. It is important that someone be accountable for each measure. Ownership should be assigned to the individual or group directly responsible for a measure's performance and data accuracy. Measure owners should then enter commentary that explains the performance of that measure. In the example shown in Figure 1-2, the VP MKTG user is the owner of the Business Development measure.

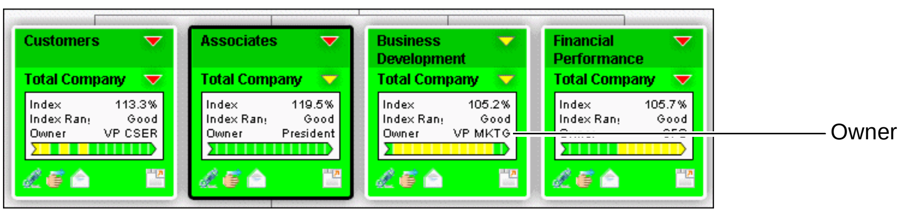


Figure 1-2 Measure owners

In Metrics Management, there are three types of measures:

- Data measures always appear at the lowest level of the view structure. They are submeasures within a view. A data measure is information that is entered either manually or imported into Metrics Management. You aggregate data measures at higher levels to make up formula measures or group measures.
- Formula measures are mathematically comprised of data measures or other formula measures in the system. They are always parent measures and provide information, such as index results.
- Group measures associate disparate measures. Formulas are not always appropriate. For instance, net income and customer survey cannot easily be associated by using a formula. Using grouping, these measures can be

associated. Creating a group measure includes the submeasures that must be weighted according to their importance.

About locations

Locations apply a measure hierarchy to geographical or operational structures in your organization. You use locations to see the overall performance of a single location or division, and to compare one location to another. For example, locations do not necessarily represent geographical locations. They can represent operational units, divisions, projects, or any other element that is meaningful to your organization. In our current global corporate environment, it is often important to reflect data about a specific group that operates across multiple countries. For example, your engineering division can include groups in San Francisco, Kansas City, Toronto, Fribourg, and Shanghai. Measure structures can contain multiple location hierarchies.

Figure 1-3 shows Total Company composed of the North America, UK, EMEA, and AsiaPac locations. Lower in the structure, the United States contains the Western US, Central US, and Eastern US locations.

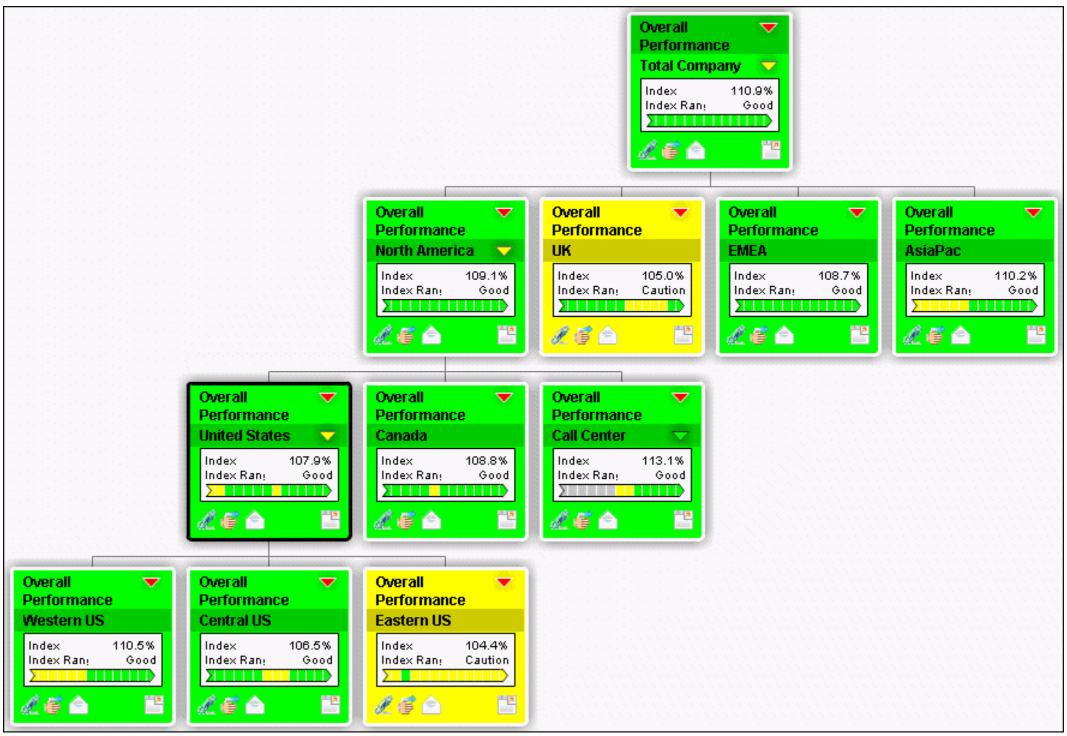


Figure 1-3 Performance by location

About performance weights

When performance is based on a group of measures, some measures can be more important than others. Use weights to assign relative importance to measures. For example, to show that Customer Complaints has more of an impact than Positive Contacts on the performance of the Consumer Contacts measure, assign Customer Complaints a weight of 60%, and Positive Contacts a weight of 40%, as shown in Figure 1-4.

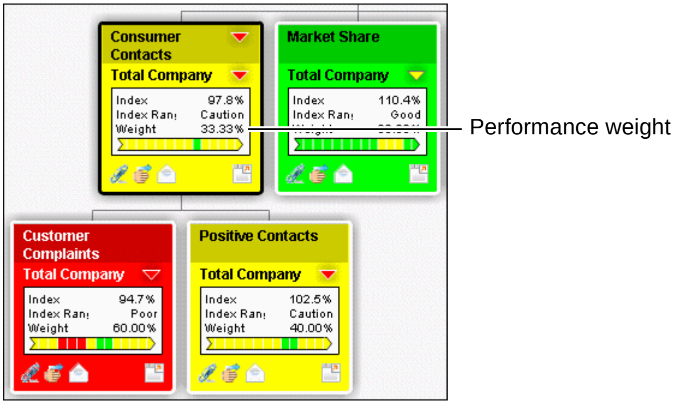


Figure 1-4 Performance weights

About performance calculations for measures

A performance management system succeeds when it provides relevant facts and data about current performance, and highlights what needs to be improved. Management's challenge is to turn raw data into useful information.

To calculate the performance of a measure, Metrics Management uses comparatives, indexing, and performance ranges and colors.

About comparatives

Without comparative data, it is difficult to determine how a measure performs. Metrics Management uses comparative data to calculate an index value for every measure. Index values standardize the measurement of performance across different types of measures, so that you can compare them.

For measures to be meaningful, compare them to some kind of target or benchmark, which is called a comparative. Common comparatives are budgets, targets, previous year results, and internal or external benchmarks.

For example, the On-time delivery measure has an actual value of 640. To give this value meaning, compare the actual data to the target comparative of 800. The following comparison shows that on-time delivery is not performing as expected and gives you a relative idea of how far off target the performance is:

Actual	=	640
Target	=	800

About indexing

Metrics Management uses an indexing system to evaluate a measure's actual performance instead of comparative data, so that an index over 100% is always positive, and below 100% is always negative.

On-time delivery	=	640
Target on-time delivery	=	800
Index	=	80%

In this simple example, the performance is poor, as compared against the target. Specifically, the On-time delivery measure is performing at 20% below the performance goal compared with the target.

For some measures, such as sales figures, a high value is good. For others, such as the number of complaints you receive, high values are bad. When you set up measures in Metrics Management, you specify the measure's polarity. That is, you specify whether high values are positive or negative. Metrics Management uses this polarity setting when it computes a measure's index.

If high values are positive, the formula for an index is:

```
100 + (Base - Comparative)/|Comparative| * 100
```

If high values are negative, the formula for an index is:

```
100 - (Base - Comparative)/|Comparative| * 100
```

In each formula:

```
|Comparative|
```

is the absolute value of Comparative.

Index charts can show trends in index values over time. In Figure 1-5, compared with the target, on-time delivery has deteriorated from being better than target, to the current level, which is well below target. You can view an index chart in the dashboard in briefing books, maps, and views.

About performance colors and performance ranges

Performance colors provide a visual cue that clearly identifies variances in performance. A measure displays a performance color depending on how it is performing. Typically, a manager sees that red indicates poor performance, yellow indicates caution, and green indicates good performance. Gray indicates that there is missing or invalid data for that time period.

To determine a measure's performance color, a measure's index value is matched against one of five performance ranges. Each range has an upper and lower index value. The range of index values is 0% through 200%. Each range has a performance color and performance indicator, such as good. Performance ranges are defined for your entire database or for individual measures.

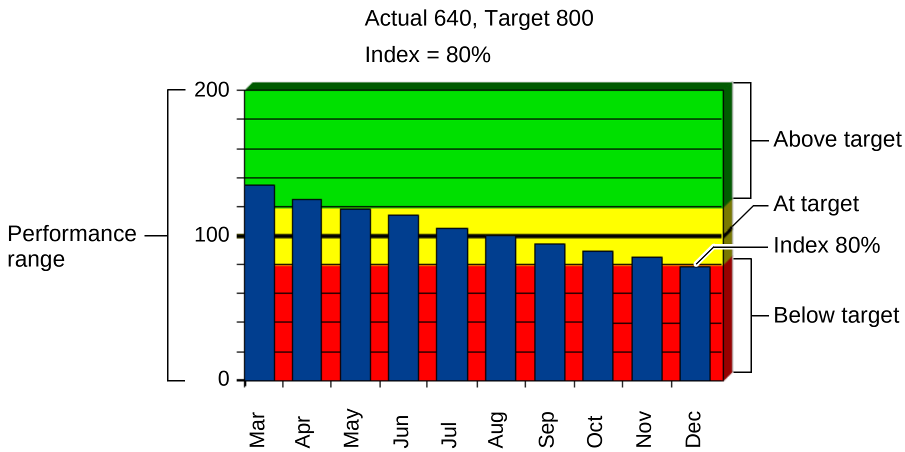


Figure 1-5 Index chart showing performance trends

For example, in Figure 1-6 the Customer Complaints measure displays a red performance color and an index value of 94.7%. By default, a measure with an index value between 50 and 95 displays a red performance color.

About trend indicators

By default, a measure displays a trend indicator. The trend indicator is an arrow that contains color-coded bars. Each bar indicates the measure's performance for a previous period. The bar at the tip of the arrow displays the most recent period. The number of periods displaying depends on the view's selected period and period range settings. The indicator displays a maximum of 14 periods. In Figure 1-6, the indicator shows performance for the first eight months of the year.

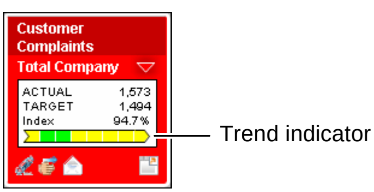


Figure 1-6 Trend indicator showing measure performance

About briefing books

Briefing books provide an alternative way of viewing measure and location information. In a view, measures display in a hierarchical measure structure that aligns measures to their respective areas of strategic focus. Briefing books display measures regardless of the measure structure.

Measures in a briefing book share some characteristics with measures in a view. If a measure has submeasures, you can drill down the measure structure as you can in a view. Like a view, the briefing book is dynamic and updates whenever new information is entered into the system.

A briefing book contains sections. Sections are pages or chapters within a briefing book. Figure 1-7 shows the Balanced Metrics Management book opened to the Objectives section. Sections contain measures that are individually selected or returned from a filter. For example, a briefing book can have a section that shows all red measures. Separate briefing books can be created for individual users, departments, or for an entire organization.

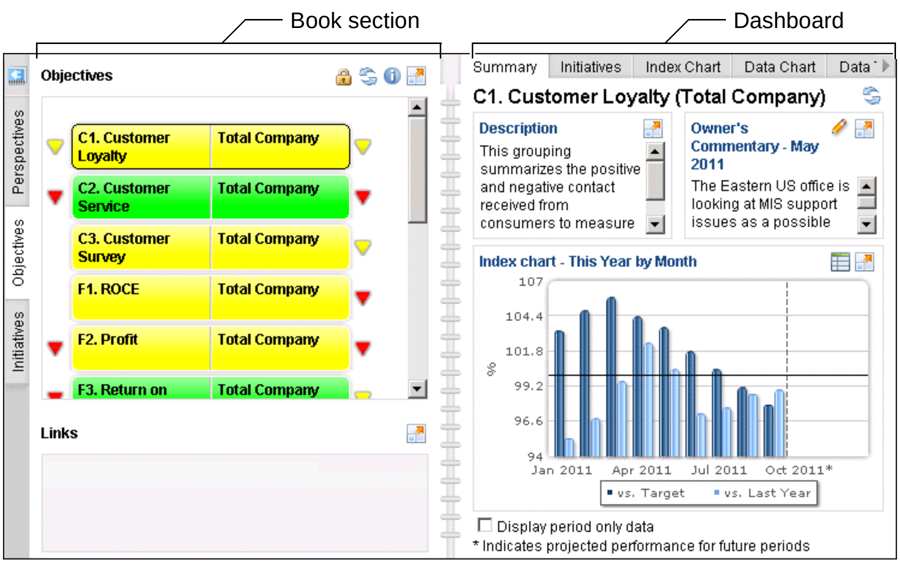


Figure 1-7 Balanced Metrics Management Book

A section displays multiple measures and locations on one side of the briefing book. The opposite side of the book displays the measure's dashboard. Sections can contain links to related information such as maps, document links, internet links, and e-mail links. Link tooltips display the link type, link, or map, followed by the link name. For example, the tooltip for a link to the Performance Highlights map displays Map: Performance Highlights.

About maps

Maps graphically represent measure performance in an alternative format to the hierarchy found in the view. Maps contain diagrams that display performance information and that can link to other Metrics Management objects, such as a book or view. Typical examples of maps include strategy maps, process maps, geographical maps, and cause and effect diagrams. Figure 1-8 shows a map that contains Sales and Advertising performance measures by month and location.

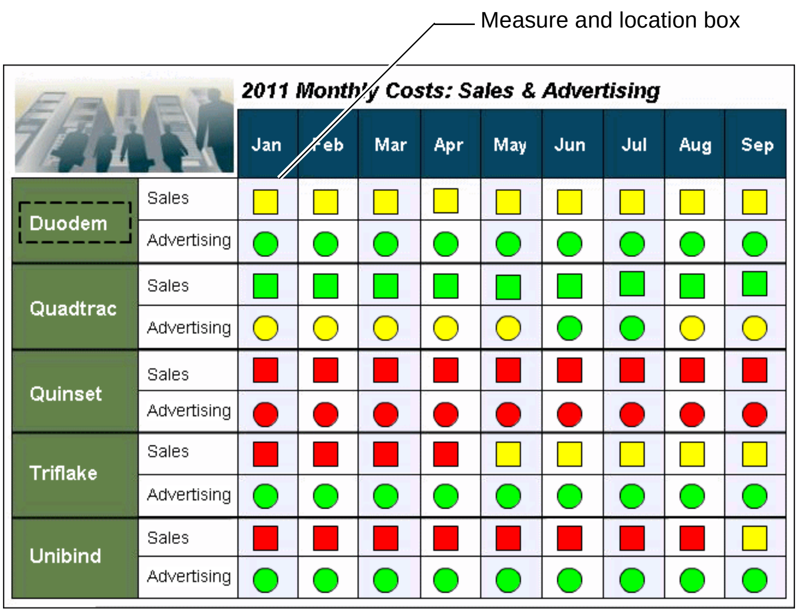


Figure 1-8 Map with performance measures

About dashboards

The dashboard displays measure performance graphically in index and data charts and numerically in table format. The dashboard displays additional information about a measure, for example, a dashboard contains owner commentary, or the initiatives associated with the measure. Optionally, a dashboard contains an embedded internal or external web site. The dashboard displays on the opposite side of a briefing book, map, or view.

A dashboard contains tabs that display measure and location information in different ways. The Summary tab displays by default when the dashboard is open. Dashboards can have different layouts for the Summary tab. The system specialist specifies the information that appears on the Summary tab. Figure 1-9 shows a data chart and data table in the dashboard.

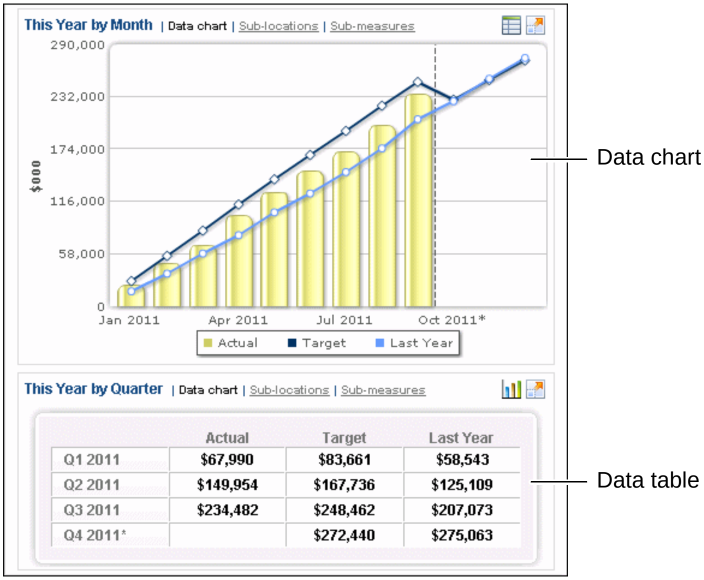


Figure 1-9 Data Chart tab in the dashboard

About initiatives

An initiative is a task associated with a measure and location pair. An initiative belongs to the measure in which it is created. Typically, a measure owner creates an initiative to address a problem with a measure's performance, or to define goals related to the organization's performance management strategy. Then, the measure owner creates subinitiatives as needed. For example, the Survey Customers subinitiative, as shown in Figure 1-10, represents a task that supports the Customer Service Improvement initiative.

To assess the performance of an initiative, the initiative's owner typically specifies start and end dates, budget values, or selects a rating. The owner enters planned, forecast, and actual data for date and budget values. A rating is a qualitative assessment of the initiative's performance. The owner updates the status of the date, budget, and rating values as work progresses on the task defined by the initiative. Metrics Management displays start and end date, budget, and rating performance indicators for an initiative, as shown in Figure 1-10.

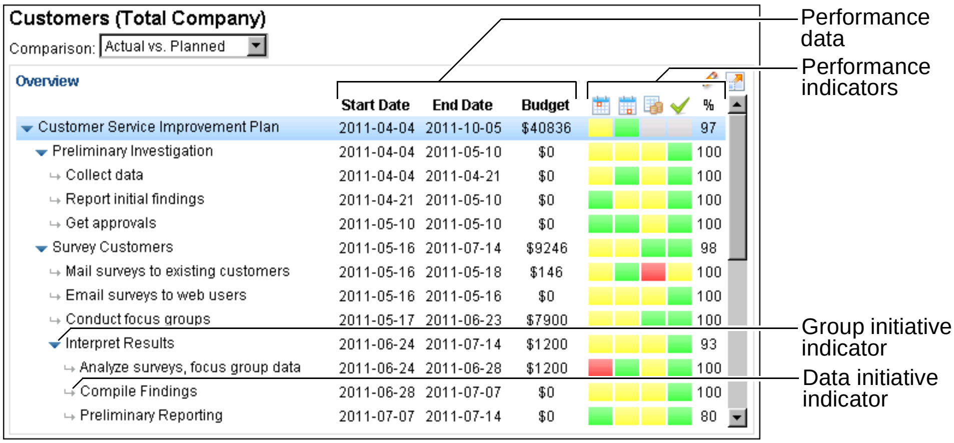


Figure 1-10 The Customer Service Improvement Plan initiative tree

There are two types of initiatives:

- Data initiatives are children of group initiatives. A data initiative can contain start date, end date, budget values, rating, and percentage complete values. A user inputs data for a data initiative. An inward pointing arrow indicates a data initiative, as shown in Figure 1-10.

- Group initiatives are parents of data initiatives or other group initiatives. A group initiative obtains performance data from the data subinitiatives at the next lowest level in the tree. Metrics Management supports assigning weights to the subinitiatives of a group initiative. A downward pointing arrow indicates a group initiative, as shown in Figure 1-10.

About performance calculations for initiatives

To display date performance colors for initiatives, Metrics Management compares planned, forecast, and actual start and end dates. Similarly, to display budget performance colors, Metrics Management compares planned, forecast, and actual budget values. The values that Metrics Management uses to calculate these performance colors depend on the comparison series selected for an initiative. Metrics Management supports selecting the Actual vs. Planned, Actual vs. Forecast, or Forecast vs. Planned comparison series. An initiative must contain date or budget values to calculate and display performance colors. An initiative must have a rating selected to display a rating performance color.

About start and end date performance indicators

Metrics Management calculates start and end date performance values by comparing dates specified for an initiative. Metrics Management supports five date ranges: week, two-week, month, quarter, and long-term. Metrics Management chooses which date range to apply to an initiative based on two criteria: the selected comparison series and the difference in days between end and start dates. Table 1-1 shows the formula, which Metrics Management uses to determine which date range to apply to an initiative.

Table 1-1 Performance date range formulas by comparison series

Selected comparison series	Performance date range formula
Actual vs. Planned	# Days = Planned end date - Planned start date
Actual vs. Forecast	# Days = Forecast end date - Forecast start date
Forecast vs. Planned	# Days = Planned end date - Planned start date

Table 1-2 shows the date ranges that Metrics Management applies to an initiative, depending on the difference in end and start dates. For example, if the difference between an initiative's planned end and start dates is 25 days, Metrics Management applies the month range.

Table 1-2 Performance date range criteria by date range

Date range	Number of days between end and start date
Week	0 to 7 days
Two-week	8 to 14 days
Month	15 to 28 days
Quarter	29 to 84 days
Long-term	More than 84 days

Metrics Management applies a performance indicator to an initiative's start or end date based on the variance between the initiative's planned, forecast, or actual dates. Table 1-3 shows the formula that Metrics Management uses to calculate an initiative's start or end date performance. Metrics Management applies a formula, depending on the comparison series selected for the initiative.

Table 1-3 Performance range formulas by comparison series

Comparison series	Date	Performance range formula
Actual vs. Planned	Start date	# Days = Actual - Planned start date
Actual vs. Planned	End date	# Days = Actual - Planned end date
Actual vs. Forecast	Start date	# Days = Actual - Forecast start date
Actual vs. Forecast	End date	# Days = Actual - Forecast end date
Forecast vs. Planned	Start date	# Days = Forecast - Planned start date
Forecast vs. Planned	End date	# Days = Forecast - Planned end date

Table 1-4 shows the lower and upper limits supported for each range. For a date range, high values are considered bad, as a high value indicates that an initiative is late.

Table 1-4 Performance date range criteria and range limits

Date range	Lower limit	Upper limit
Week	–7 days	7 days
Two-week	–14 days	14 days
Month	–28 days	28 days
Quarter	–84 days	84 days
Long-term	–168 days	168 days

About the budget performance indicator

The budget performance range specifies the colors and labels for the budget performance indicator. Metrics Management calculates budget performance values by comparing two budget values in an initiative, for example, the actual vs. planned budget values. The budget values used in the calculation depend on the comparison series selected for the initiative. Table 1-5 shows the formulas that Metrics Management uses to calculate the budget value for each comparison series.

Table 1-5 Budget performance range formulas

Selected comparison series	Budget performance range formula
Actual vs. Planned	Actual budget / Planned budget
Actual vs. Forecast	Actual budget / Forecast budget
Forecast vs. Planned	Forecast budget / Planned budget

The budget index has a range of 0-200%. The default label for an index range of 160-200% is very poor, for 105-160% is poor, for 95-105% is caution, for 50-95% is good, and for 0-50% is excellent. Ranges cannot overlap. An initiative must specify a budget value to display a budget performance indicator.

About the rating performance indicator

The rating indicator represents a qualitative ranking of an initiative by the initiative's owner. A user specifies a ranking by selecting a ranking value for an initiative. The rating limit values are not configurable. The default labels for a rating range of 4-5 is excellent, for 3-4 is good, for 2-3 is caution, for 1-2 is poor, and for 0-1 is very poor.

About group initiative performance values

Group initiatives obtain performance values from the data and group subinitiatives at the next level in the tree. Metrics Management uses the same formulas to calculate both data and group initiative date and budget performance indicators. Table 1-6 shows the date values that Metrics Management uses in group start and end date performance indicator calculations.

Table 1-6 Values used in group initiative date performance formulas

Date type	Date value used in initiative performance calculation
Actual start date	Earliest subinitiative actual start date
Forecast start date	Earliest subinitiative forecast start date
Planned start date	Earliest subinitiative planned start date
Actual end date	Latest subinitiative actual end date
Forecast end date	Latest subinitiative forecast end date
Planned end date	Latest subinitiative planned end date

Table 1-7 shows the budget values that Metrics Management uses in group budget performance indicator calculations.

Table 1-7 Values used in group initiative budget performance formulas

Date type	Budget value used in initiative performance calculation
Actual budget	Unweighted sum of subinitiative actual budgets
Forecast budget	Unweighted sum of subinitiative forecast budgets
Planned budget	Unweighted sum of subinitiative planned budgets

For group initiative rating and percentage complete indicators, Metrics Management performs the following calculations:

- For a group initiative's rating indicator, Metrics Management sums the weighted ratings of the group's subinitiatives.
- For a group initiative's percent complete indicator, Metrics Management sums the weighted percent complete values of the group's subinitiatives.

Chapter

2

Using Metrics Management

This chapter discusses the following topics:

- Opening and navigating Metrics Management
- Personalizing Metrics Management
- Using a view
- Using a book
- Using a map
- Using a dashboard
- Using an initiative
- Using a link

Opening and navigating Metrics Management

The following sections show how to log in to Metrics Management and how to navigate in Metrics Management using Navigation Pane and the Metrics Management toolbar.

Logging in

To access Metrics Management, log in using the URL provided by your system specialist.For convenience, save the URL as a favorite in the web browser. From the URL, you can log in any to the following components:

- Metrics Manager Web. Metrics Manager Web runs Metrics Management in Google Chrome, Microsoft Internet Explorer, or Mozilla Firefox. You use Metrics Manager Web to access and update performance information and create certain Metrics Management objects, such as maps.
- Metrics Manager. Metrics Manager runs the Metrics Management as an application launched from a web browser. The system specialist typically uses Metrics Manager to create and administer Metrics Management objects.

The system specialist sets up users to have access to different parts of Metrics Manager Web and Metrics Manager and has the authority to impersonate any user.

How to log in to Metrics Manager Web or Metrics Manager

1 Provide your login name and password, as shown in Figure 2-1.

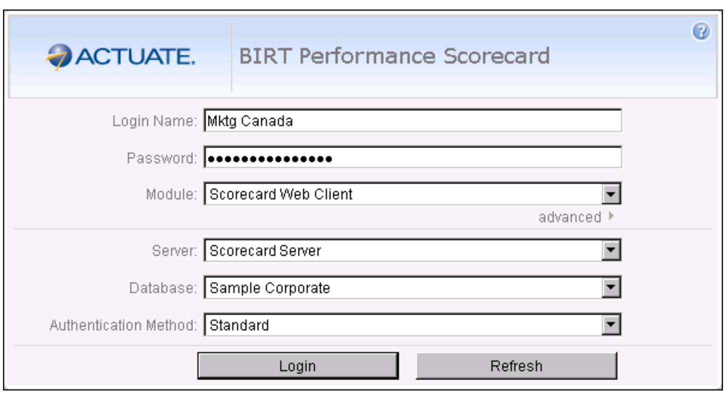


Figure 2-1 Login window

2 From Module, perform one of the following tasks:

- To log in to Metrics Manager Web, select Metrics Manager Web.
- To log in to Metrics Manager, select Metrics Manager.

3 From Server, select a server name.

4 From Database, select a database.

5 From Authentication method, select an authentication method.

The authentication method indicates which application validates your login name and password.

6 Choose Login. The Metrics Management home page appears by default for Metrics Manager Web. If you choose to launch Metrics Manager, choose Close in the confirmation message. Metrics Manager launches in a separate window.

How to download Metrics Manager

The first time that you access Metrics Manager, Metrics Management downloads files that Metrics Manager uses each time the client launches. Metrics Management also creates shortcuts on your Start menu that you can use to launch Metrics Manager.

1 In Internet Explorer, enter the URL provided by your system specialist, for example, http://MetricsManagementServer/MetricsManager.

2 In Application Run - Security Warning, as shown in Figure 2-2, choose Run.

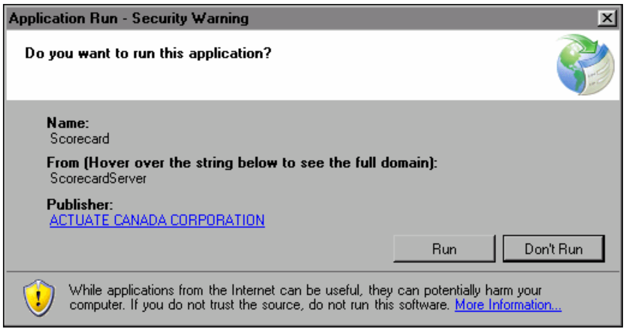


Figure 2-2 Choosing to run Metrics Manager

Metrics Manager downloads, as shown in Figure 2-3.

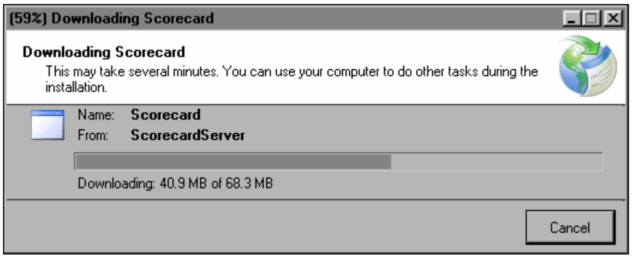


Figure 2-3 Downloading Metrics Manager

Metrics Manager launches.

Navigating Metrics Management

The following sections show to how navigate Metrics Management using Navigation Pane and how to open objects from the Metrics Management toolbar.

Using Navigation Pane

You can open objects such as books, maps, initiatives, and views from Navigation Pane, which is located at the side of Metrics Management, as shown in Figure 2-4. In Navigation Pane, objects appear in two lists, all objects and My Favorite objects. For example, choose Views to show the All Views and My Favorite Views lists. Choose a view from either list to open that view in the main window. To edit your list of favorites, see "Changing home page and Navigation Pane favorites," later in this chapter.

Showing or hiding Navigation Pane

Navigation Pane appears at the side of Metrics Management by default. Lock Navigation Pane to display it at all times. Optionally, show or hide Navigation Pane using one of the following options.

How to show Navigation Pane

To show Navigation Pane, choose Show Navigation Pane at the left edge of the screen.

How to hide Navigation Pane

To hide Navigation Pane, choose Hide Navigation Pane at the left edge of the screen.

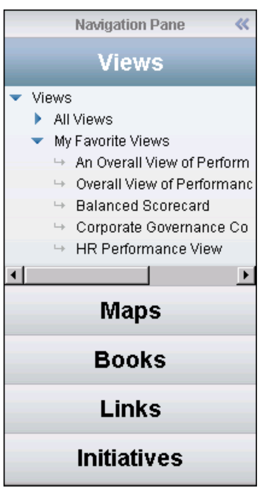


Figure 2-4 Navigation Pane

Using the Metrics Management toolbar

Figure 2-5 shows the toolbar. You can use the toolbar to navigate to areas of Metrics Management that you use frequently, for example, to open your home page or favorite book. The toolbar also contains information about the Metrics Management session that you are logged into, for example, the name of the current database.

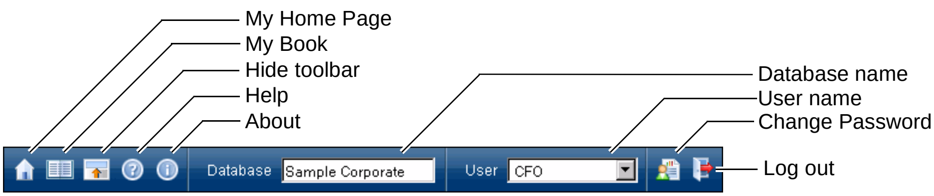


Figure 2-5 Metrics Management toolbar

The toolbar contains the following elements:

- My Home Page
  Opens the home page
- My Book
  Opens the favorite briefing book
- Hide toolbar
  Hides the toolbar in books, maps, and views
- Help
  Opens Metrics Management help
- About Metrics Management
  Opens a page displaying the Metrics Management version, and the name of the server and database to which you are logged in
- Database name
  Displays the name of the database to which you currently have access
- User name
  Displays the name of the user that you are logged in as
- Logout
  Logs out the current user

Personalizing Metrics Management

The following sections show how to personalize the Metrics Management home page and define preferences, such as your startup page, preferred location, default e-mail address, dashboard display defaults, and the language displayed in Metrics Management. The following sections also show how to change your password, home page and Navigation Pane favorites, and add a book section to your home page.

Using the home page

The home page, shown in Figure 2-6, provides a personalized perspective of the entire Metrics Management environment. The home page provides easy access to the books, initiatives, links, maps, and views that you define as favorites. To open the home page, choose My Home Page on the toolbar. To edit favorites, see “Changing home page and Navigation Pane favorites,” later in this chapter.

Links contain a user’s favorite links and the information links defined by the system specialist. Information links provide a convenient way to access other performance management content, news about your performance management initiative, and other related applications. A link is unavailable from the Web when the link contains a path that is inaccessible from the Web Client.

Figure 2-6 Home page

Defining your preferences

Your system specialist defines preference settings. To change or define these settings, complete any of the following tasks:

- Change your Metrics Management authentication password.
- Change home page and Navigation Pane favorites.
- Add a book section to your home page.

The system specialist must allow you to change your Metrics Management password before you can change it. Otherwise, this option is unavailable. Your new password must be at least eight characters, is case sensitive, and can contain special characters. The Metrics Management database that you are connecting to must use Metrics Management authentication.

How to change your Metrics Management authentication password

1 On the toolbar, choose Change Password.

2 In Metrics Management - Change Password, provide your current password, provide your new password, and confirm your new password by providing it a second time, as shown in Figure 2-7. Then, choose OK.

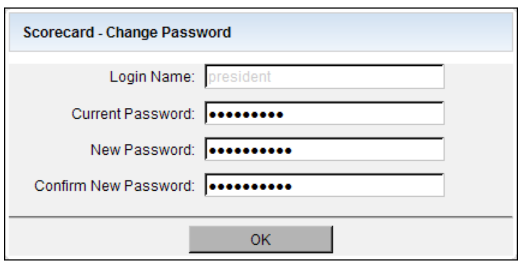


Figure 2-7 Changing your password

A message confirming that your password changed appears.

Changing home page and Navigation Pane favorites

You can personalize the list of objects that appear as favorites. Your favorites appear in Navigation Pane in My Favorite <item name>, as well as on the home page. Books, initiatives, links, maps, and views all have a favorites list.

Initiatives support defining an initiative as a favorite in Initiatives. Performing this task also defines the initiative as a favorite on the home page and in the My Favorite Initiatives list.

How to add an object as a favorite

1 On the home page, choose Edit <Object type> beside an object type. For example, beside Maps, choose Edit Maps.

2 In Edit Favorite <Object type>, to filter the available list, in Type here to Filter Available List, type one or more characters. In the example shown in Figure 2-8, Available is filtered to show maps that begin with C.

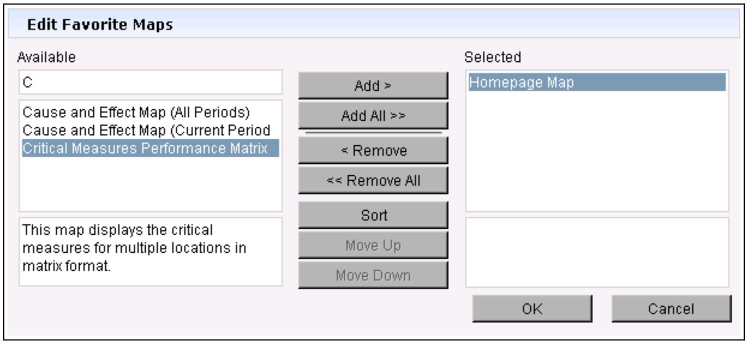


Figure 2-8 Filtering the list of favorites in Available

3 To add the object to the Selected list, choose Add. Figure 2-9 shows the Critical Measures Performance Matrix in the Selected list.

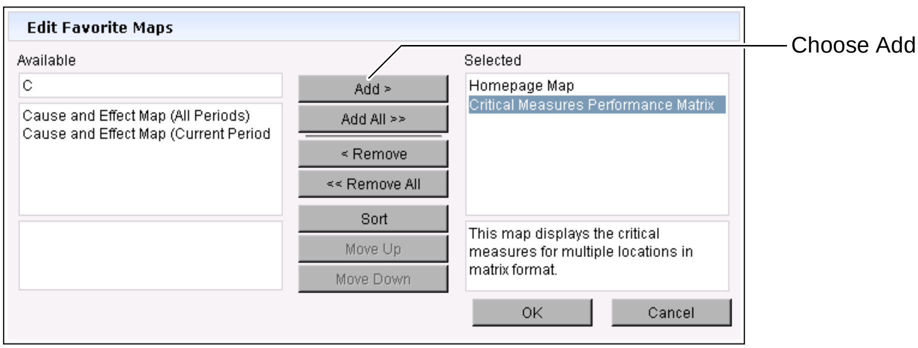
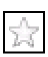


Figure 2-9 Choosing favorites

4 Choose OK. The object appears in the My favorite list in Navigation Pane and on the home page.

How to define an initiative as a favorite



In Initiatives, select Add to Favorites beside an initiative. The Add to Favorites icon appears colored, as shown for the Survey Customers initiative in Figure 2-10.

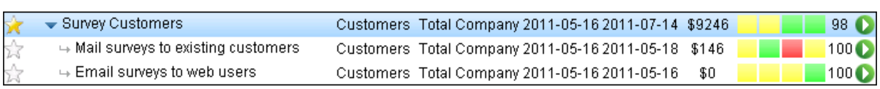


Figure 2-10 Adding an initiative as a favorite

Adding a book section to the home page

You can add a book section to the home page, as a home page alert. For example, add a section that contains measures you watch to your home page.

How to add a book section to the home page

1. At the bottom of the home page, beside All Critical problems, choose Edit Section.
2. In Edit Section, to filter the available list, in Type here to Filter Available List, type one or more characters. In the example shown in Figure 2-11, Available is filtered by sections that begin with M.

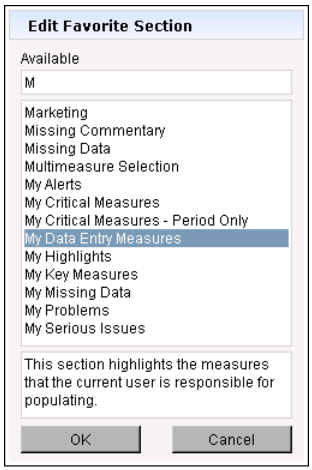


Figure 2-11 Filtering the available book sections

3. Select an available book section, as shown in Figure 2-12.

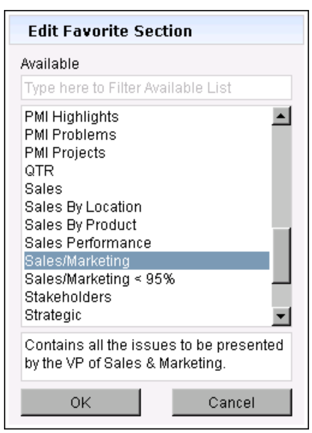


Figure 2-12 Specifying a book section as a home page alert

4 Choose OK. The book section appears on the home page.

Using a view

A view, shown in Figure 2-13, is a hierarchical structure that displays the relationship between strategic objectives and performance measures. You can use the lists at the top of the view to change the comparison series, location, or period for measure and location boxes in the view.

The following sections describe how to open and navigate through a view, specify display options for a view, and print or save a view. The section also shows how to use measure and location boxes in a view.

Figure 2-13 Overall view of performance

The view contains the following elements:

- Comparison list
  Defines the base and comparison series for measure and location boxes.
- Location list
  Defines the top location for measure and location boxes.
- Period list
  Defines the display period for measure and location boxes.
- View toolbar
  Defines display options for the view. For more information about the view toolbar, see "Using the view toolbar," later in this chapter.

- Measure and location box

  Displays a measure and location pair. For more information about measure and location boxes, see “Using a measure and location box,” later in this chapter.

Opening a view

You can open a view from Navigation Pane or from the home page. From a home page section, you can open a view with the selected measure and location as the view’s top measure and location.

How to open a view from Navigation Pane

1 In Navigation Pane, choose Views➛All Views.

2 In the main window, choose a view. The view opens in the main window.

How to open a favorite view from the home page

1 Open the home page.

2 In Views, choose a view. The view opens in the main window.

How to open a view from a home page section

1 In the home page section, place the cursor over a measure and location box.

2 Choose the arrow beside the measure and location box.

3 In the menu, choose Show View. The view opens in the main window.

Drilling down the measure or location hierarchy

A view is a visual representation of both the measure and location structure. A measure box in a view can have two drill-down arrows, a measure arrow, and a location arrow. Use these arrows to drill down the view by measure or location. The measure arrow only appears for formula or group measures with submeasures. The lowest measure in the measure or location structure does not show an arrow.

How to drill down by measure

Choose anywhere on a measure and location box, other than on an arrow, to drill down the view by measure. The measure arrow indicates that there are measures below and that you can drill down further. The color of the measure arrow indicates the performance color of the worst-performing submeasure. Figure 2-14 shows submeasures of the Consumers measure.

Figure 2-14 Drilling down by measure

How to drill down by location

Choose the location arrow in a measure and location box to drill down the location structure of the view. This arrow indicates that there are locations below and that you can drill down further. The color of the location arrow indicates the performance color of the worst-performing sublocation. Figure 2-15 shows the sublocations of the Overall Performance measure at the North America location.

Figure 2-15 Drilling down by location

Expanding or collapsing the view structure

You can expand or collapse the entire measure or location structure, and show more than one branch in the structure at a time.

How to expand the entire measure or location structure

1. Choose Actions➛Show for Tree➛Show many Branches.
2. Perform one of the following tasks:

- To expand the entire measure structure, choose Actions➛Expand All Measures.
- To expand the entire location structure, choose Actions➛Expand All Locations.

How to collapse the entire measure or location structure

Perform one of the following tasks:

- In Actions➛Show for Tree, deselect Show many Branches.
- Choose the top measure or location in the view structure.

How to show more than one branch at a time

Choose Actions➛Show for Tree➛Show many Branches. This choice supports opening another area of the view without collapsing a branch that is already open.

Changing the orientation of the view structure

You can change the orientation of the view structure. Choose to have the view appear vertically, horizontally, or in an outline form. By default, a view displays vertically. Figure 2-16 shows the horizontal view structure and outline form.

Horizontal view structure

Outline form

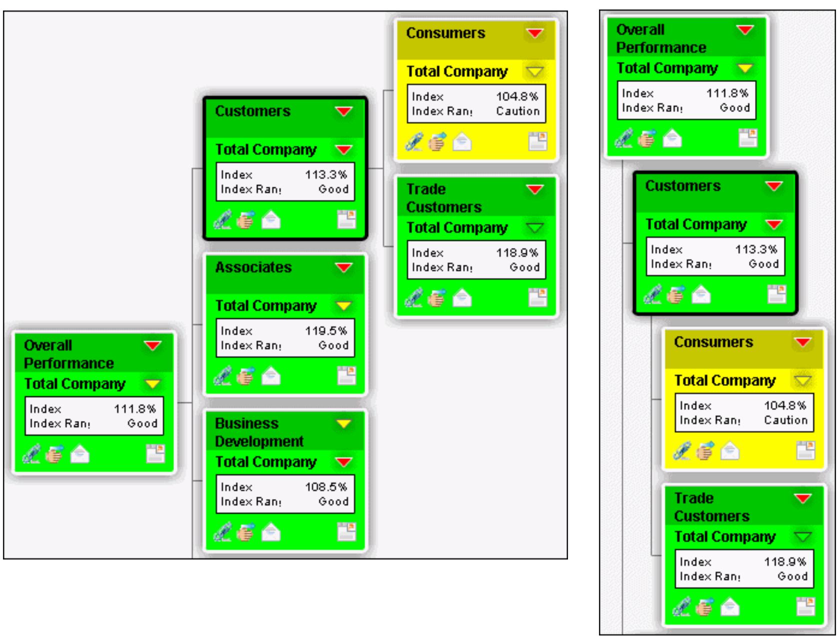


Figure 2-16 Displaying the horizontal view structure and outline form

How to change the orientation of the view structure

Perform one of the following tasks:

- To show the tree vertically, choose Actions➛Show for Tree➛Show Vertical.
- To show the tree horizontally, choose Actions➛Show for Tree➛Show Horizontal.
- To show the tree as an outline, choose Actions➛Show for Tree➛Show Outline.

Using the view toolbar

Figure 2-17 shows the view toolbar. This toolbar shows all display options available for the view. Metrics Management supports changing display options for the view and for measure and location boxes, and opening and resizing the dashboard. The dashboard displays additional information for the selected measure and location pair. The dashboard contains data tables, charts, initiatives, and commentary. For more information on using dashboards, see "Using a dashboard," later in this chapter. For more information about setting measure and location box display options, see "Specifying measure and location box contents," later in this chapter.

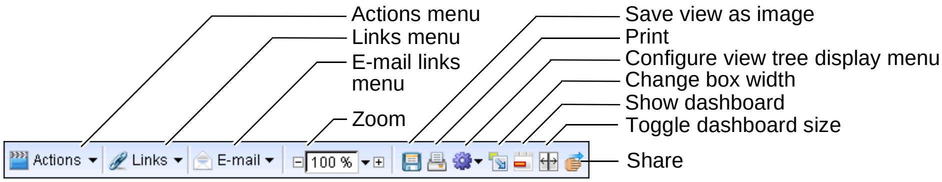


Figure 2-17 View toolbar

The view toolbar contains the following elements:

- Actions menu

  Contains options to open the dashboard, change the orientation of the view, expand or collapse the view structure, navigate the view, open an associated map, save the view as an image, export the view, or show the accessible view.

- Links menu

  Contains links to database information, and measure and location information.

- E-mail links menu

  Contains e-mail links associated with the selected measure and location pair.

- Zoom

  Changes the view magnification level.

- Save view as image

  Saves the view as the image type specified by the system specialist.

- Print

  Prints the view.
- Configure view tree display menu

  Contains options to specify the information that appears in measure and location boxes, for example, the index, target, weight, variance, and owner.
- Change box width

  Specifies one of three sizes for measure and location boxes.
- Show dashboard

  Displays the dashboard for the selected measure and location pair.
- Toggle dashboard size

  Toggles the dashboard size between 25%, 50%, 75%, and 100% of the view pane.
- Share

  Opens Share, which displays links specific to the selected measure and location pair.

Opening an associated map

From the Actions menu, you can open an associated map. An associated map is a map that is based on the view that is open.

How to open an associated map

Choose Actions➛Open Associated Map, and select a map to open.

Printing a view

Before printing a view, expand or collapse the view to show the measures and locations to print. For a large view, Metrics Management splits the print job into rows and columns and a message indicates the number of rows and columns that print. For example, the message shown in Figure 2-18 indicates that the view prints on 2 rows and 3 columns. In this case, the first row prints on pages 1-3, and the second on pages 4-6.

Figure 2-18 The number of rows and columns printed

How to print the view

To print the view, from the view toolbar, choose Print.

Saving a view as an image

Metrics Management supports saving a view as an image. The view saves in the file format defined by the system specialist.

How to save a view as an image

1. In a view, from the toolbar, choose Save view as image.
2. In Save Image, navigate to a location to save the image.
3. Type a file name.
4. Choose Save.

Using a measure and location box

Figure 2-19 shows a measure and location box. Each box represents a measure or location in the view structure.

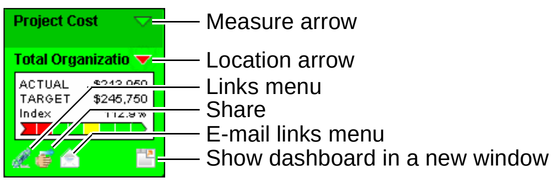


Figure 2-19 Measure and location box

A measure and location box can contain the following elements:

- Measure arrow
  Opens the next measure branch in the view structure.
- Location arrow
  Opens the next location branch in the view structure.
- Links menu
  Contains links to database, location, and measure information.
- Share
  Opens Share, which displays links specific to the selected measure and location pair.
- E-mail links menu
  Contains e-mail links associated with the selected measure and location pair.
- Show dashboard in a new window
  Opens the dashboard for the measure and location pair in a new window.

Specifying measure and location box contents

You specify the information that appears in measure and location boxes by choosing options from the Configure view tree display menu. For example, you can show the measure and location's index value, weight, variance, and owner for all boxes in a view. Figure 2-20 shows the Solvent Reduction measure with all available display options enabled. A measure arrow and submeasure index range identifier do not appear because Solvent Reduction is the lowest measure in the branch.

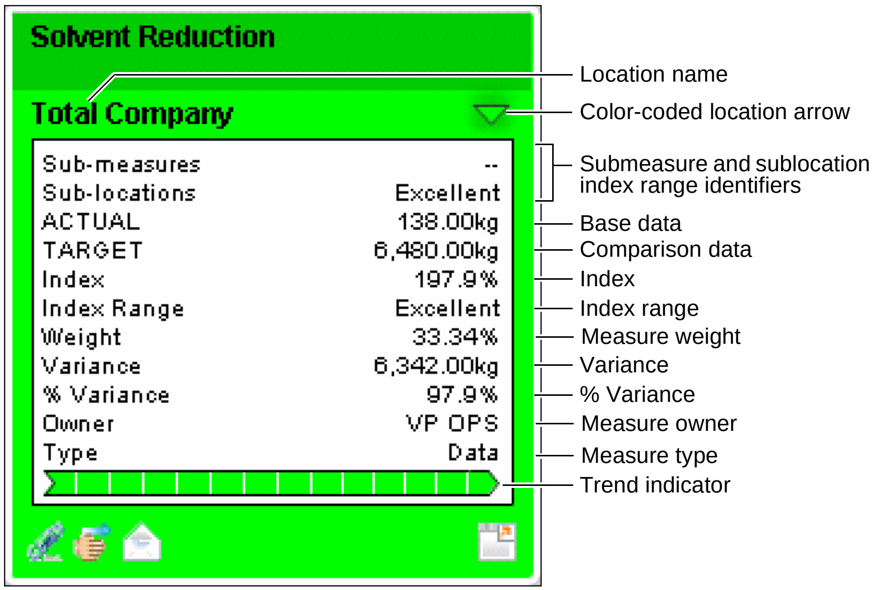


Figure 2-20 Measure and location information for the Solvent Reduction measure

You can select the following display options for measure and location boxes:

- Show Base Data
  Displays a measure's base data value.
- Show Comparison Data
  Displays a measure's comparison data value for the selected comparison.
- Show Hints
  Displays measure and location information as a tooltip when a user moves the mouse pointer over a measure and location box.
- Show Index
  Displays a measure's index value.
- Show Index Range Identifier
  Displays a text representation of a measure's index value.

- Show Location

  Displays the location name below the measure name.
- Show Location Arrow Colors

  Displays color-coding in location arrows. Color-coding indicates the performance of the worst-performing sublocation in a view branch.
- Show Measure Arrow Colors

  Displays color-coding in measure arrows. Color-coding indicates the performance of the worst-performing submeasure in a view branch.
- Show Owner

  Displays a measure's owner.
- Show Submeasure and Sublocation Index Range Identifiers

  Displays a text representation of the worst-performing submeasure and sublocation in a view branch.
- Show Summary Bar

  Displays measure and location information in a bar at the bottom of the view for the selected measure and location box.
- Show Trend Indicator

  Displays previous performance information in bars in a color-coded trend indicator arrow.
- Show Trend Indicator Hints

  Displays tooltips for a period in the trend indicator when a user moves the mouse pointer over a measure and location box. The tooltip displays the period date, index value, and index range identifier.
- Show Type

  Displays the measure type.
- Show Variance

  Displays a data or formula measure's variance, which is the difference between the measure's actual and comparative values.
- Show % Variance

  Displays a data or formula measure's percentage variance, which is the variance as a percentage of the comparative.
- Show Weight

  Displays a measure's weight.

Using a book

A book is a collection of measures and locations, organized by individual sections, which are tabs in the book. This section describes how to open and navigate through a book. Figure 2-21 shows a book.

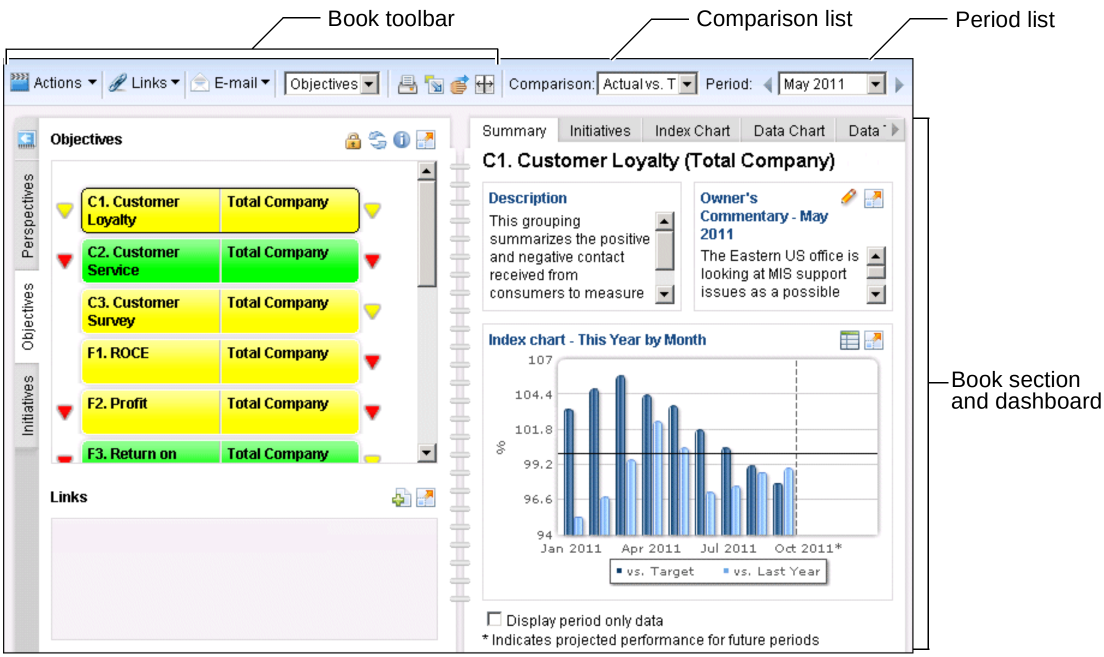


Figure 2-21 Briefing book

The following components support the use of book sections:

- Book toolbar
  Defines display and edit options for the book.
- Comparison list
  Contains a selection which defines the base and comparison series for measures and locations in the section.
- Period list
  Contains a selection which defines the display period for measures and locations in the section.

Opening a briefing book

Metrics Management supports opening a briefing book from Navigation Pane, the Metrics Management toolbar, or the home page. Opening a book from a home page section opens a book containing only that section.

Metrics Management supports opening My Book from the Metrics Management toolbar. My Book is a briefing book that the system specialist defines for your organization. My Book typically contains a strategic objective section, as well as sections showing your measures. A book opens to the book cover page. The example in Figure 2-22 shows the Balanced Metrics Management Book cover page.

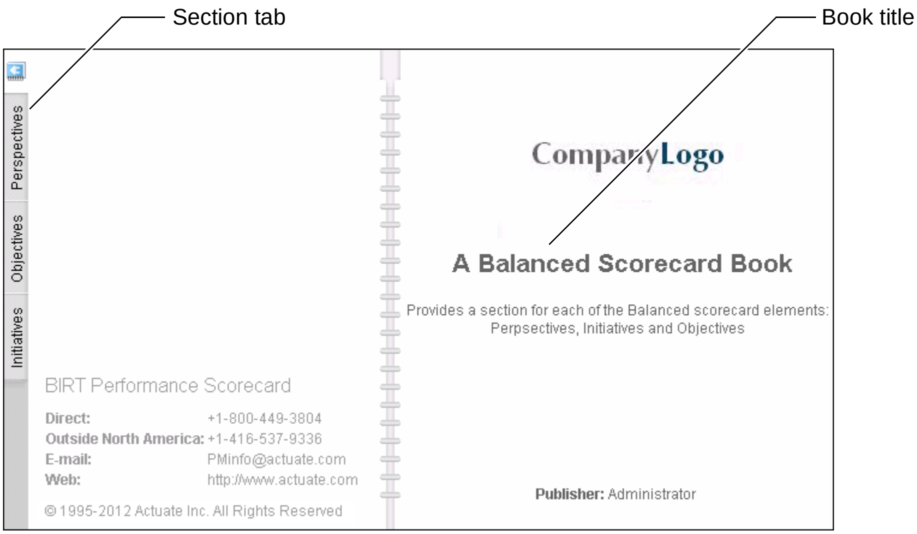


Figure 2-22 Opening the briefing book cover page

How to open a briefing book

1. In Navigation Pane, choose Books➛All Books. A list of all the briefing books opens in the main window.
2. Choose a briefing book. The briefing book opens in the main window.

How to open a favorite book from the home page

1. Open the home page.
2. In Books, choose a book. The book opens in the main window.

How to open a home page section as a separate book

To open the home page section as a book that contains only that section, in the home page section, select the home page section name. The section opens in the main window.

How to open My Book

To open My Book, choose My Book in the Metrics Management toolbar.

How to open a book section

Choose a section tab to open that section of the book. Figure 2-22 shows a section tab.

Using a section

Figure 2-23 shows a book section. A briefing book contains sections. Sections are pages or chapters within a briefing book. Sections can contain measures, links to documents, and performance commentary. A section can be used in more than one book.

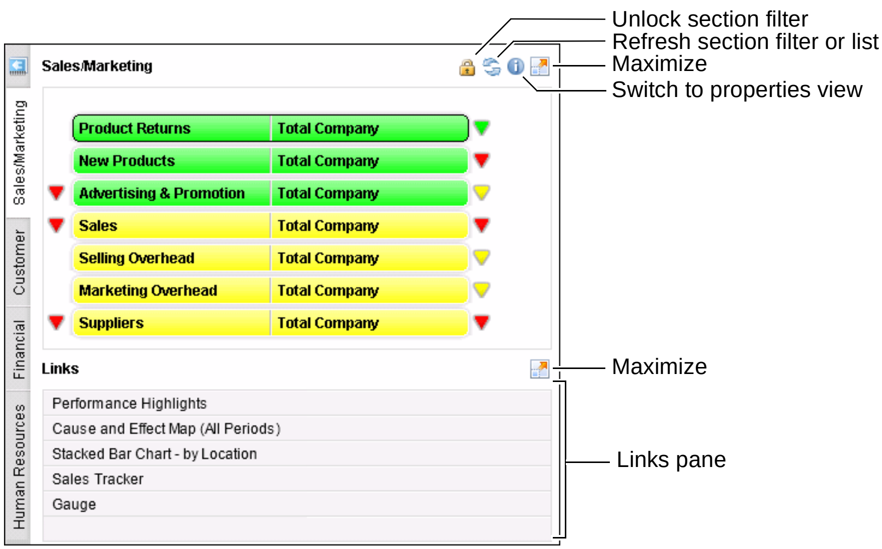


Figure 2-23 Using a briefing book section

Metrics Management supports locking or unlocking a section that is created from a filter. Changing the lock setting is unavailable when drilling down into measures or locations in a section. Changing the comparison series or period, or refreshing the section, produces the following results:

- When a section is locked, measure and location data update.
- When a section is unlocked, the filter returns measure and locations using the most recent data in the system, or the new comparison series or period.

The book section contains the following elements:

- Lock or unlock section filter
  Toggles the lock on the section filter.

- Refresh section filter or list
  Refreshes measure data in the section. When a section is based on a filter that is unlocked, refreshing returns new filter results.
- Switch to properties view
  Toggles to display measures and locations, or section and filter properties.
- Maximize
  Expands the measure and location section in the book.

Drilling down in a section

Choose a measure arrow to drill down through a measure structure, as shown in Figure 2-24. Choose a location arrow to drill down through the location structure.

Arrows only appear beside measures that have submeasures, and locations that have sublocations. The color of the arrows indicates performance levels at lower levels of the structure.

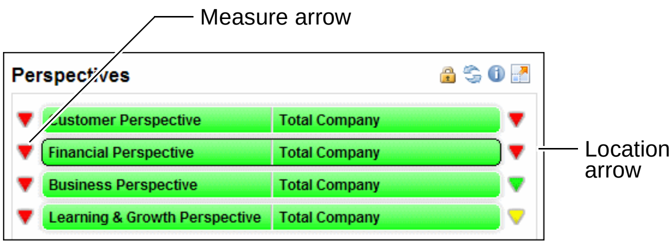


Figure 2-24 Drilling down through a measure

Using the book toolbar

Figure 2-25 shows the book toolbar. This toolbar shows all the display options available for the book.

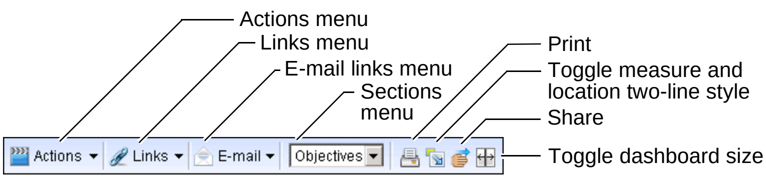


Figure 2-25 Book toolbar

The book toolbar contains the following elements:

- Actions menu
  Contains options to show or hide measure and location arrows, or show measure and location pairs on two lines.

- Links menu
  Contains links to database, measure, and location information.
- E-mail links menu
  Contains e-mail links associated with the selected measure and location pair.
- Sections menu
  Contains links to the sections in the book.
- Print
  Prints the book.
- Toggle measure and location two-line style
  Shows measure and location pairs on either one or two lines in a book section.
- Toggle dashboard size
  Toggles the dashboard size between 25%, 50%, 75%, and 100% of the view pane.
- Share
  Opens Share, which displays links specific to the selected measure and location pair.

Using the measure and location two-line style

Use measure and location two-line style if your measure or location names are long and you cannot read them in books. In Figure 2-26, measure and location names show on one line in the first image and on two lines in the second image.

Names on a single line: Names on two lines:

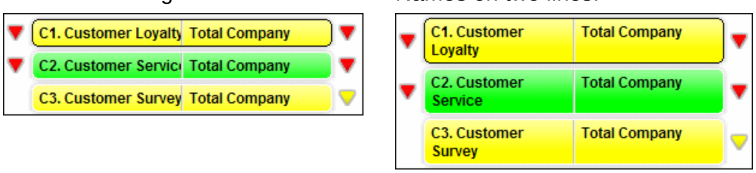


Figure 2-26 Measure and location names on one and two lines

How to display the measure and location two-line style

1 Open a book and open a section.

2 Choose Toggle measure and location two-line style to toggle between the two display settings, measure and location names appearing on a single line or on two lines.

Printing a briefing book

You can print an individual section from a briefing book.

How to print a briefing book section

1 Open your briefing book and select the section that you want to print.
2 Choose Print.
3 Specify a different printer from your default printer, if necessary.
4 Choose Print. The image you see on your screen is printed.

Using a map

A map, shown in Figure 2-27, is an interactive, visual representation of performance measures. The following sections describe how to open and use measures and locations in a map.

Figure 2-27 Sales and Advertising map

A map contains the following elements:

- Comparison list
  Contains a selection which defines the base and comparison series for measure and location boxes
- Location list
  Contains a selection which defines the location for measure and location boxes

- Period list

  Contains a selection which defines the display period for measure and location boxes

If your map boxes are based on measures, you can use the Location list to change the location for all measures in the map. If your map boxes are based on locations, use the Measure list to change the measure for all locations in the map. If your map boxes are based on measures and locations, the Map window displays only the Comparison and Period lists.

Opening a map

You can open a map from Navigation Pane or from the home page.

How to open a map

1. In Navigation Pane, choose Maps➛All Maps. A list of all the maps opens in the main window.
2. Choose a map. The map opens in the main window.

Using measures and location boxes in a map

In a map, you can perform the following actions:

- Hover over a measure and location box to display a hint.
- Ctrl-click a measure and location box to display the dashboard.
- Double-click a measure and location box to open a view based on the selected measure.
- Right-click a measure and location box and select Launch link to open a link attached to the map. A link name can be hidden in the measure and location box. Launch link does not appear if the measure and location box has no attachment.

Using the map toolbar

Figure 2-28 shows the map toolbar. This toolbar shows all the display options available for the map.

The map toolbar contains the following elements:

- Actions menu

  Contains options to show the dashboard or configure the map display
- Links menu

  Contains links to database, measure, and location information

■ E-mail links menu
Contains e-mail links associated with the selected measure and location pair

■ Zoom
Changes the map magnification level

■ Save map as image
Saves the map as the image type specified by the system specialist

■ Print
Prints the map

■ Design map
Opens the map for editing in Map Designer

■ Show dashboard
Displays the dashboard for the selected measure and location pair

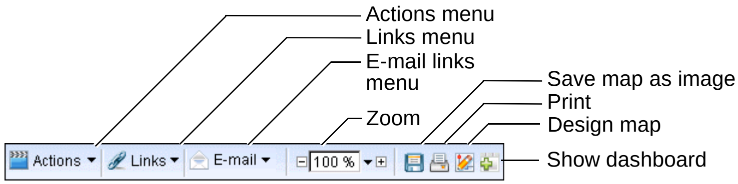


Figure 2-28 Map toolbar

You can perform any of the following tasks from the Actions menu:

■ To display the dashboard for the selected measure or location box, choose Actions➛Show Dashboard. The dashboard appears on the opposite side of the map.

■ To display a dashboard in a separate window, choose Actions➛Show Dashboard in a Window. Alternatively, Ctrl-click a measure or location box to open the dashboard in a separate window.

■ To access summary data for a measure or location, turn on hints by choosing Actions➛Configure Map Display➛Show Hints, and mouse over any object.

■ To display summary data of the selected measure or location, turn on the status bar at the bottom of the window by choosing Actions➛Configure Map Display➛Show Summary Bar, and choose any object.

■ To save the map as an image, choose Actions➛Save Map As Image.

Saving a map as an image

Metrics Management supports saving a map as an image. The map saves in the file format defined by the system specialist.

How to save a map as an image

1 In a map, from the toolbar, choose Save Map As Image.
2 In Save Image, navigate to a location to save the map.
3 Type a file name.
4 Choose Save.

Printing a map

You can print a map from the map toolbar.

How to print a map

1 Open the map that you want to print.

2 Choose Print.
3 Specify a different printer from your default printer, if necessary.
4 Choose OK.

Using a dashboard

A dashboard is an information pane that shows detailed information about a specific measure or location in a briefing book, map, or view. This section describes how to open the dashboard, and use dashboard tabs, tables, and charts.

Opening a dashboard

You can choose to display a dashboard in a view or map. In a briefing book, the dashboard associated with the selected measure always appears on the opposite page. You can open a dashboard in a separate window from a book or view, or from a home page section.

You can also open a dashboard containing initiative performance information from an initiative.

How to show the dashboard in a view or map

- To show the dashboard in a view or map, choose Show Dashboard. The dashboard appears next to the view or map.

- To close the dashboard, choose Hide Dashboard.

How to open the dashboard in a separate window from a view

To open a dashboard in a separate window from a view, choose Show Dashboard in a Window in any measure and location box.

How to open the initiative dashboard in a separate window

1. In Navigation Pane, choose Initiatives➛My Favorite Initiatives. A list of favorite initiatives opens in the main window.
2. Choose Open Initiative Detail from a specific initiative. The dashboard opens in a separate window containing the initiative and subinitiatives.

How to open the dashboard in a separate window from a book or home page section

1. Place the cursor over a measure and location pair.
2. Choose the Measure and location actions arrow beside the measure and location pair.
3. From the menu, choose Show Dashboard.

Using the Summary tab

The dashboard Summary tab is configurable by your system specialist. The Summary tab often contains the elements shown in Figure 2-29.

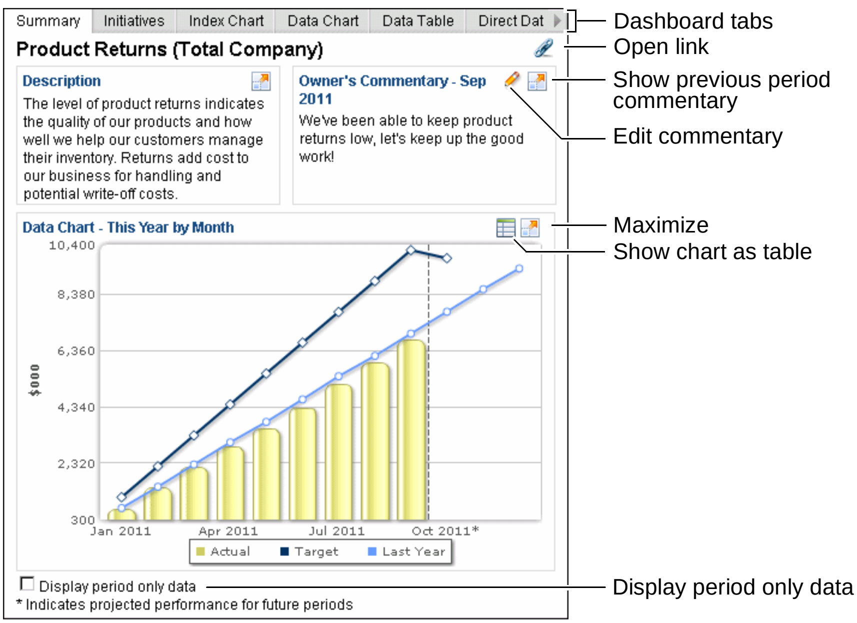


Figure 2-29 Summary tab of a dashboard

Your system specialist defines the layout of the Summary tab. The following list describes all available elements in the Summary tab:

- Open link

  Opens the link associated with the selected measure. The link only appears if a dashboard link is specified for the measure.

- Show previous period commentary

  Expands the commentary boxes to show the current and prior period commentary.

- Edit commentary

  Opens commentary for editing in the dashboard. You must have commentary entry privileges for the selected measure and location pair.

- Maximize

  Expands the chart size.

- Show chart as table

  Shows the data in the chart as a table.

- Show table as chart

  Shows the data in the table as a chart.

- Display period only data

  Shows only the data from the current period. Deselect to show consolidated data.

In addition to the Summary tab, the dashboard can contain the following tabs:

- Initiatives tab

  Displays initiatives associated with the measure.

- Index Chart tab

  Displays the performance of the measure over time in index chart format.

- Data Chart tab

  Displays the performance of the measure over time in data chart format.

- Data Table tab

  Displays the data for the measure in table format.

- Direct Data Entry tab

  Enables data input for the measure. This tab only appears if you have data entry privileges for the selected measure and location pair. For more information about direct data entry, see "Entering data for measures and initiatives" in Chapter 3, "Working with data."

- Commentary tab

  Displays commentary for the measure. If you have commentary entry privileges for the measure, you can enter commentary for the measure here.

- Web Content tab

  Displays a web page. The tab only appears if the system specialist has enabled the tab. The system specialist personalizes the name of the Web Content tab.
- Info tab

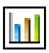
  Displays additional information for the measure, such as measure type, owner, and submeasures.

Using the Index Chart, Data Chart, and Data Table tabs

In the Index Chart, Data Chart, and Data Table tabs, you can perform the following tasks:

- Show data in a chart or table.
- Expand and collapse a chart or table.
- Show sublocations or submeasures for a measure and location pair.
- Restore the contents of a dashboard tab.

How to show data in a chart or table in the dashboard



- To display data in chart format, choose Show table as chart.

- To display data in table format, choose Show chart as table.

How to expand a chart or table size in the dashboard

- To expand a chart or table, choose Maximize.

- To collapse a chart or table, choose Restore down.

How to show sublocations or submeasures for a measure and location pair

To show data for the measures and locations lower in the hierarchy, choose Sublocations or Submeasures.

How to restore the dashboard layout for a dashboard tab

Metrics Management preserves changes to a dashboard tab when you navigate from one measure and location pair to another in a book, map, or view. Metrics Management preserves changing the size of a chart or table, changing a chart to a table or a table to a chart, and showing a measure's sublocations or submeasures. Metrics Management does not preserve changes to the dashboard font size.

To restore the default layout of charts and tables in a dashboard tab, choose Restore default dashboard layout.

Changing the dashboard size

In a view or map, you can change the dashboard size to 50%, 75%, and 100% of the main window. In a book, you can change the dashboard size to 50% or 100% of the main window.

How to change the dashboard size in a view or map

To change the dashboard size in a view or map, perform one of the following tasks:

- To increase the dashboard size, choose Toggle Dashboard Size. Choosing Toggle Dashboard Size expands the dashboard size to 25%, 50%, 75%, and 100% of the main window, and then to the original dashboard size. Alternatively, double-click the dashboard edge to toggle the dashboard size.
- To manually resize the dashboard, select the edge of the dashboard, then drag and resize the dashboard.

How to change the dashboard size in a book

To expand the dashboard to the full width of the main window, choose Toggle Dashboard Size. Choose Toggle Dashboard Size again to resize the dashboard to 50% of the main window.

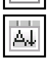
Changing the text size in the dashboard

Metrics Management supports changing the text size for presentation purposes in the dashboard, for example, to increase the text size when projecting a dashboard chart in a meeting. Changing the text size affects all expanded dashboard cells. Logging out of Metrics Management resets the text size.

How to change the text size in a dashboard tab

1. In a dashboard tab, choose Maximize to expand a dashboard cell.
2. To change the text size, perform one of the following tasks:

   - To increase the text size, choose Increase font size.



   - To decrease the text size, choose Decrease font size.

Saving or printing a chart

Open a chart in a separate window to view a larger version of the chart and to save the chart as an image, or to print the chart.

How to save or print a chart

1. In the dashboard, right-click and choose Preview Chart.
2. In Preview Chart, shown in Figure 2-30, perform one of the following tasks:

- To save the chart as an image, choose Save As Image. In the web browser dialog box, download and save the file.
- To print the chart, choose Print Chart. In the print dialog box, specify print settings specific to your system and choose Print.

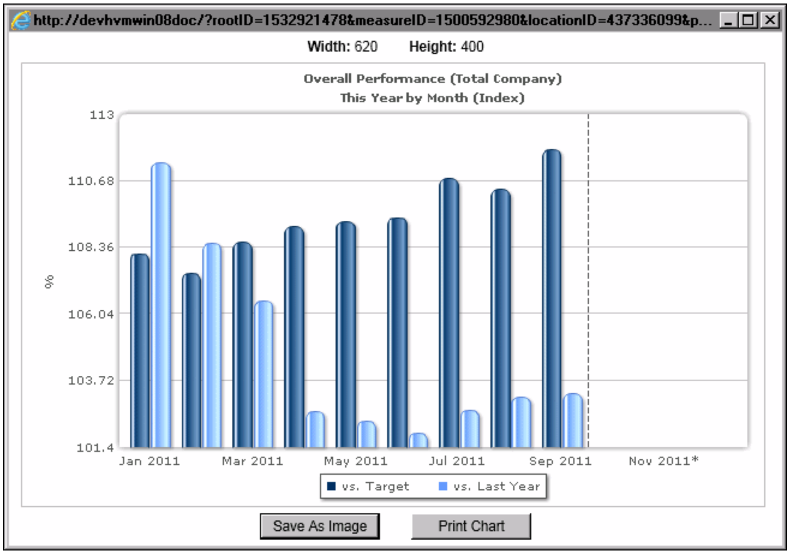


Figure 2-30 Opening an index chart in Preview Chart

3 Close Preview Chart.

Copying dashboard data

Metrics Management supports copying and pasting dashboard information into other Windows applications. Data from a Data table pasted into Excel appears in columns rather than as a pasted object.

How to copy dashboard elements

1 In the dashboard, display the dashboard information to copy.

2 Perform one of the following tasks:

- To copy text or a table:
  1 Choose and drag to select the text or table to copy.
  2 Right-click and choose Copy.
- To copy the data on which a chart is based, right-click and choose Copy Data to Clipboard.

3 Open the Windows application in which to paste the dashboard information.

4 Choose Edit➛Paste Special, and then choose which format to use to paste.

Using an initiative

An initiative is a task assigned to a measure. A measure can contain multiple initiatives, which are organized into one or more hierarchical structures. The top initiative in a structure is always a group initiative. A group initiative is an initiative that contains subinitiatives. Initiatives at the lowest level in the hierarchy are data initiatives.

This section describes how to open an initiative, view and interpret initiative performance data, and search for initiatives.

Opening an initiative

Opening an initiative opens the initiative and its subinitiatives. You view initiatives in the following locations:

- In the initiatives dashboard

  Open initiatives assigned to the selected measure in the dashboard in a book, map, or view. Open a separate dashboard from Initiatives in the main window.

- In Initiatives in the main window

  Open Initiatives from the home page or Navigation Pane. Consider opening initiatives in the main window instead of navigating to a specific measure and location pair in a book, map, or view.

How to open an initiative from a book, map, or view

1. In a book, map, or view, select a measure and location pair.
2. In the dashboard, select Initiatives. The initiatives that belong to the measure and location pair appear in the dashboard.

How to open initiatives from the home page

1. Open the home page.
2. In Initiatives, choose an initiative. For example, the Customer Service Improvement Plan initiative opens, as shown in Figure 2-31.

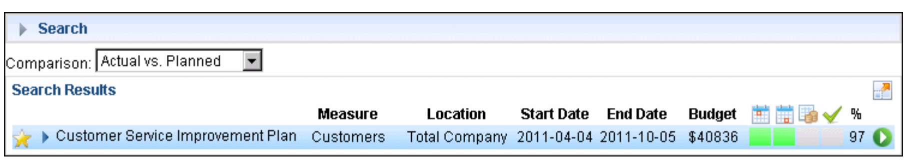


Figure 2-31 Opening initiatives from the home page

3 To show the next level of initiatives, choose Expand, as shown in Figure 2-32.

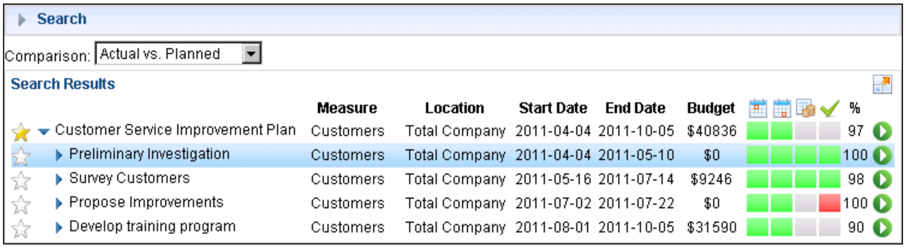


Figure 2-32 Expanding the initiatives tree

How to open initiatives from Navigation Pane

In Navigation Pane, choose Initiatives➛My Favorite Initiatives. Favorite initiatives appear in a list in the main window.

How to open an initiative in a separate dashboard window

In Initiatives in the main window, choose Open Initiative Detail for an initiative. The dashboard opens in a separate window containing the initiative and subinitiatives.

Viewing initiative performance data

Metrics Management displays start date, end date, budget performance, and rating performance indicators. Metrics Management also displays the progress of an initiative as a percentage. Figure 2-33 shows the Overview section of the Initiatives dashboard tab for the Customers measure. An initiative displays performance information depending on the selected comparison series.

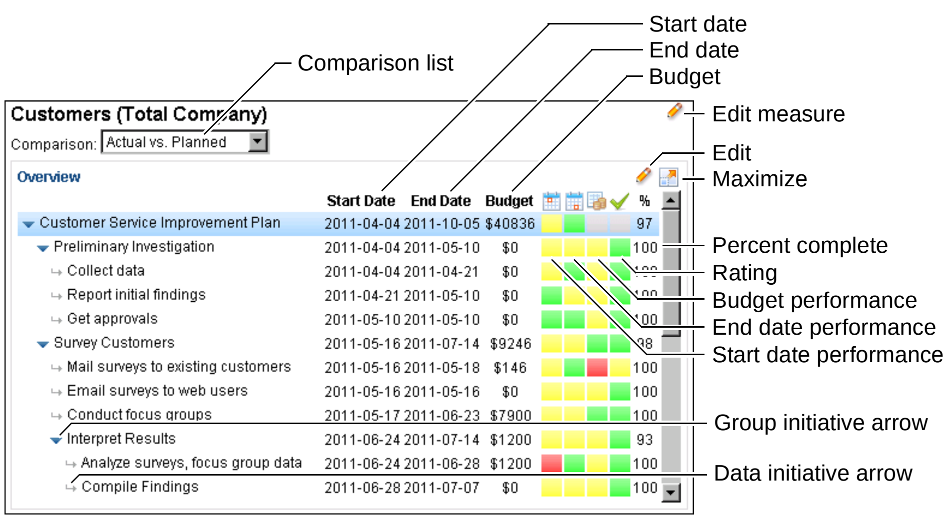


Figure 2-33 Overview section in the Initiatives tab of a dashboard

The Overview section contains the following values and performance indicators for initiatives:

- Comparison list
  Defines the base and comparison series used to calculate data for the start date, end date, and budget performance indicators. Select from the Actual vs. Planned, Actual vs. Forecast, and Forecast vs. Planned comparison series.
- Start date
  Displays the initiative start date for the base series.
- End date
  Displays the initiative end date for the base series.
- Budget
  Displays the budget value for the base series.
- Start date performance
  Indicates the performance of the start date.
- End date performance
  Indicates the performance of the end date.
- Budget performance
  Indicates the performance of the budget value.
- Rating
  Represents a qualitative evaluation of the initiative by the initiative owner.
- Percentage complete
  Represents an evaluation of initiative’s progress by the initiative owner.
- Group initiative arrow
  Indicates that the initiative is a group initiative.
- Data initiative arrow
  Indicates that the initiative is a data initiative.

How to view a text representation of a performance indicator

To view a text representation of an initiative’s performance indicator, hover the mouse over a performance indicator for an initiative. Performance data appears as a tooltip, as shown in Figure 2-34.

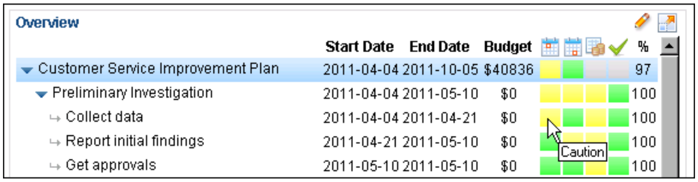


Figure 2-34 Showing the text representation of start date performance

How to change the comparison series

From the comparison list, select Actual vs. Planned, Actual vs. Forecast, or Forecast vs. Planned.

Viewing initiative detail information

Figure 2-35 shows the Details section of the Initiatives dashboard tab. Details contains additional performance information for the selected initiative. The Subinitiatives and Gantt Chart tabs only display for group initiatives. The Measure Data tab only displays for a data initiative.

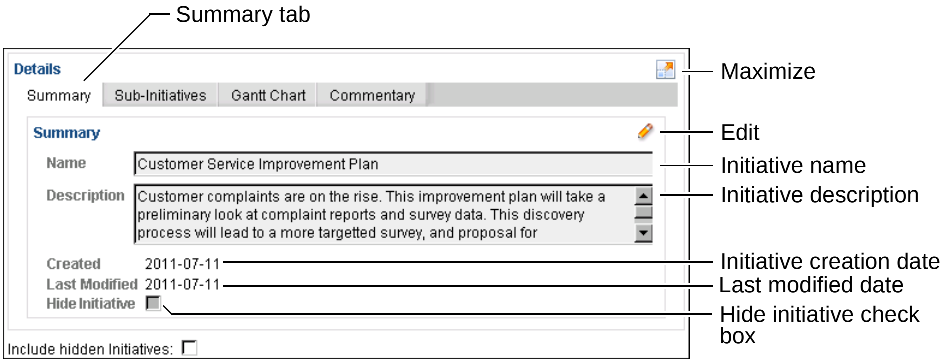


Figure 2-35 Details section in the Initiatives tab of a dashboard

The Details section contains the following elements:

- Summary tab

  Contains information on the selected initiative, including the initiative's name and description, created date, modified date, and hide initiative check box.

- Sub-Initiatives tab

  Displays the weight of subinitiatives for the selected initiative. Sub-Initiatives only appears when a group initiative is selected in Overview.

- Gantt Chart tab

  Displays a Gantt chart showing the performance of all initiatives belonging to the selected measure and location pair. You can also choose to display data in table format. Gantt Chart only appears when the top initiative is selected in Overview.

- Measure Data tab

  Displays data for planned, forecast, and actual start date, end date, and budget values. Also displays percentage complete and rating data. Measure Data only appears when a data subinitiative is selected in Overview.

■ Commentary tab

Displays commentary entered for the selected initiative.

Viewing initiative data in a Gantt chart

A Gantt chart is a bar chart that displays the progress of a series of initiatives plotted against time. This type of chart is useful for project planning, benchmarking, and providing a summary of a project's status. A Gantt chart shows all initiatives in a tree, regardless of which initiative is selected in the dashboard.

Initiatives and subinitiatives display along the *y*-axis. The *x*-axis displays the total time allotted to initiatives for the selected comparison series, separated by month. Initiatives are represented as horizontal lines. The top initiative represents the earliest start date and latest end date of the subinitiatives in the branch. A vertical line indicates today's date, if today's date occurs between the earliest start date and latest end date range.

Subinitiatives display a start and end date performance-colored icon, either a diamond, square, or triangle. A square icon represents an actual date, a diamond represents a forecast date, and a triangle represents a planned date. The color of each icon represents the performance of that start or end date. Performance for a start or end date is calculated using actual date values. If a start or end date contains no actual dates, forecast values are used, then planned values. A gray color displays for initiatives that do not contain dates.

The Gantt chart in Figure 2-36 shows the Comprehensive review of customer service call handling initiative tree comparing actual vs. planned dates.

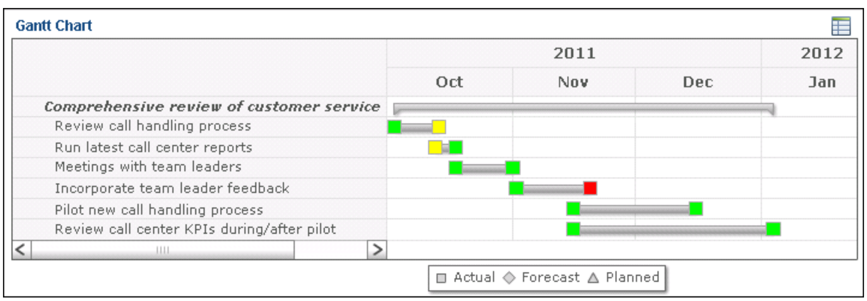


Figure 2-36 Gantt chart for an initiative tree

To show the data for initiatives in the Gantt chart in table format, choose Show chart as table. Figure 2-37 shows the Comprehensive review of customer service call handling initiative tree in table format.

Gantt Chart

	Start Date			End Date		
	Planned	Actual	+/-	Planned	Actual	+/-
Comprehensive review of customer service call handling						
Review call handling process	2011-10-03	2011-10-03	0	2011-10-11	2011-10-14	3
Run latest call center reports	2011-10-11	2011-10-13	2	2011-10-20	2011-10-18	-2
Meetings with team leaders	2011-10-20	2011-10-18	-2	2011-11-02	2011-11-01	-1
Incorporate team leader feedback	2011-11-02	2011-11-02	0	2011-11-16	2011-11-20	4
Pilot new call handling process	2011-11-16	2011-11-16	0	2011-12-16	2011-12-16	0
Review call center KPIs during/after pilot	2011-11-16	2011-11-16	0	2011-12-31	2012-01-04	4

Figure 2-37 Showing a Gantt chart as a table

Saving or printing a Gantt chart

Open a Gantt chart in a separate window to view a larger version of the chart and to save the chart as an image, or to print the chart.

How to save or print a Gantt chart

1. On a Gantt chart, right-click and choose Preview Chart. The chart appears in a separate window in Preview Chart.
2. In Preview Chart, perform one of the following tasks:
   - To save the chart as an image, choose Save As Image. In File Download, choose Save. In Save As, specify a location and choose Save. In Download complete, choose Close.
   - To print the chart, choose Print Chart. In the print dialog box, specify print settings specific to your system and choose Print.
3. Close Preview Chart.

Searching initiatives

Metrics Management supports creating search conditions to search on all initiatives in the database. To create simple searches, for example, search on initiatives with a specific planned end date, or create more complex searches that contain multiple search conditions. In a search with multiple conditions, Metrics Management searches for initiatives that satisfy all search conditions. For example, a search on initiatives with a forecast end date of the quarter end and a percentage complete of less than 50% returns initiatives that meet both conditions.

Construct a search condition by specifying initiative criteria, a search operator, and a text or date value. For example, create a search condition that searches on initiatives containing a budget forecast value that is greater than or equal to $50,000.

Metrics Management supports creating a search from the following criteria:

- Budget
  Compares an initiative's actual, forecast, or planned budget value against the value specified in the search.
- Commentary
  Searches on commentary text or by user who entered commentary.
- Created date
  Compares an initiative's creation date against the date specified in the search.
- Description
  Searches on the text in an initiative's description.
- End date
  Compares an initiative's actual, forecast, or planned end date against the date specified in the search.
- Initiative name
  Searches on the text in an initiative name.
- Last modified date
  Compares an initiative's last modified date against the date specified in the search.
- Location name
  Searches on the text in a location name.
- Measure name
  Searches on the text in a measure name.
- Percent complete
  Compares an initiative's percent complete value against the percentage specified in the search.
- Performance of
  Compares an initiative's actual, forecast, or planned start or end date, or budget value against the performance value specified in the search.
- Rating
  Compares an initiative's rating value against the value specified in the search.
- Security permissions
  Searches initiatives on a specific user's security permissions, such as whether the user is the initiative owner, or can add or edit data for the initiative.
- Start date
  Compares an initiative's actual, forecast, or planned start date against the date specified in the search.

How to search on initiatives

1 In Navigation Pane, choose Initiatives➛Search Initiatives. Search appears in the main window.

2 To specify search criteria, choose Add Search Condition. From the drop-down lists, select an initiative property, an operator, and then provide a search value.

3 To specify a date value for search criteria based on date, choose Select Date, then select a date from the calendar, as shown in Figure 2-38.

Figure 2-38 Selecting a date from the calendar

For example, Figure 2-39 shows criteria selected that define a search for end dates that have a forecast value after November 15, 2011.

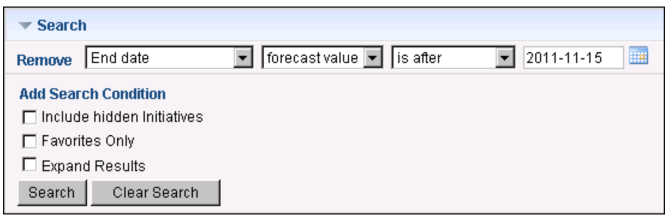


Figure 2-39 Specifying search criteria

4 In Search, perform any of the following optional tasks:

- To search on hidden initiatives, select Include hidden initiatives.
- To search on initiatives specified as favorites only, select Favorites Only.
- To show subinitiative branches expanded in the search results, choose Expand Results.

5 Choose Search. The example in Figure 2-40 shows expanded search results of initiatives with a forecast end date after November 15, 2011.

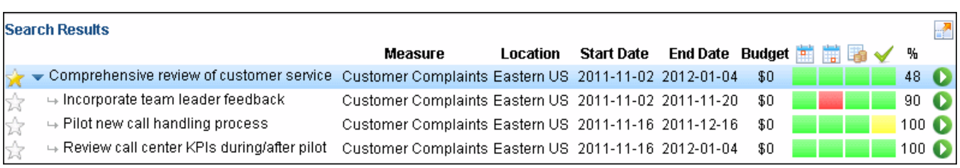


Figure 2-40 Viewing initiative search results

Using a link

You can open links from the following locations:

- The toolbar in a book section, map, or view

  - From the Links menu
    Point to either Database Info Links, Measure Links, or Location Info Links, and choose to open a specific link.

  - From the E-mail menu
    Choose to open an e-mail link.

- A measure and location pair in a view
  Choose the e-mail icon in a measure and location pair to open a menu of e-mail links.

- The home page
  Choose My Home Page, and in the Links section choose to open a link.
- Navigation Pane
  Choose Links and choose to open a link.
- From a briefing book section
  From the Link section, choose to open a link.

- From a dashboard
  Choose Open Link to open the link associated with a dashboard. If no icon appears, no link has been defined.
- From the Share page
  Access links that are organized by measure, location, category, or application type.

In Share, you can view and open the information links associated with a specific measure and location pair from a view or book. Share is context-sensitive. The links that open depend on the measure and location pair that you select. In Share, links are organized by category, measure, location, or application.

Information links are either document or web links. Links to maps, for example, cannot be opened in Share. These links appear as unavailable.

How to use Share

1 Open a view or briefing book and select a measure and location pair.

2 Choose Share. Share opens. The example in Figure 2-41 displays measure links for the Customers measure.

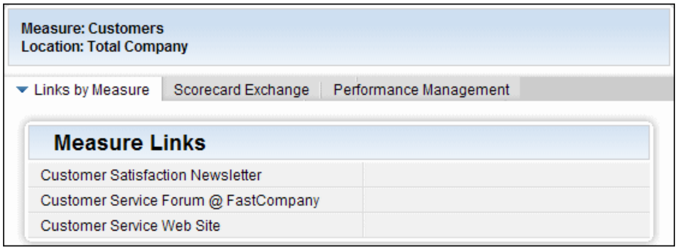


Figure 2-41 Opening the Share window

3 To change the links that display in Share, choose the arrow beside Links by Measure, and perform one of the following tasks:

- To display the links defined for the measure selected in the view or book, choose Links by Measure.
- To display the links defined for the location selected in a view or book, choose Links by Location.
- To display the links defined for the measure, location, and database, sorted by category, choose Links by Category.
- To display the links defined for the measure, location, and database, sorted by application type, for example, Excel or PDF, choose Links by Application Type.

4 To access performance management content from the Actuate web site, choose BIRT Performance Analytics. The content you see varies, depending on your license.

5 To open additional performance management resources, choose Wiki. Your system specialist can personalize this page for your organization.

Chapter

3

Working with data

This chapter discusses the following topics:

- Entering data for measures and initiatives
- Entering performance commentaries for measures and initiatives

Entering data for measures and initiatives

Metrics Management supports entering data for measures in the dashboard in any client. Entering measure data for multiple measures and locations at one time requires the Smart or Windows client. You enter measure data for multiple measures and locations in a table format in Data Entry. In Data Entry, you choose the views, measures, and locations for which to enter data. For more information on entering data for multiple measures, see *User Guide for Metrics Management*. You can enter actual and comparative measure data for any measures that you own or for which you have authority to enter data.

You enter initiative data in the dashboard and in Setup Initiatives. For all measure types, an administrator, measure owner, or measure owner assistant always has the right to enter initiative data for a measure and location. For a group measure, no other user may enter initiative data. For a data measure, a location data entry user for the measure can enter data. For a formula measure, a user who is allowed direct data entry to the measure can enter data for initiatives belonging to the measure.

If you navigate to another tab before saving changes in the dashboard, an asterisk appears beside the tab name to indicate that the dashboard contains unsaved changes.

Entering measure data in the dashboard

You can enter data manually in the dashboard for a measure or location selected in a book or view. The polarity indicator arrow in the top row of the data table indicates whether to consider high values good or bad.

How to enter data in the dashboard

1. Open a view or briefing book. If opening a view, choose Show dashboard in the toolbar.
2. Select a measure and location by drilling down.
3. Use the Period box arrows in the top-right corner of the view or briefing book to select the period for the data.
4. In the dashboard, choose Direct Data Entry.
5. Enter data into the Actual and Target boxes for the appropriate periods, as shown in the example in Figure 3-1.

6. Choose Save.

Figure 3-1 Direct data entry tab

Entering initiative data

Metrics Management supports specifying the following types of data for a data initiative:

- Planned, forecast, and actual start and end dates
- Planned, forecast, and actual budget values
- A percentage complete value
- A qualitative owner-assessed initiative rating

For a planned, forecast, or actual date, the end date must be greater than or equal to the start date. In an initiative with no dates specified, Metrics Management also enters the planned value as the forecast value for start and date and budget. For example, if you enter 10,000 as the planned budget, Metrics Management also enters 10,000 as the forecast budget.

How to enter initiative data

1 In Overview, select a data initiative.

2 In Details, in Measure Data, choose Edit. Measure Data becomes editable, as shown in Figure 3-2.

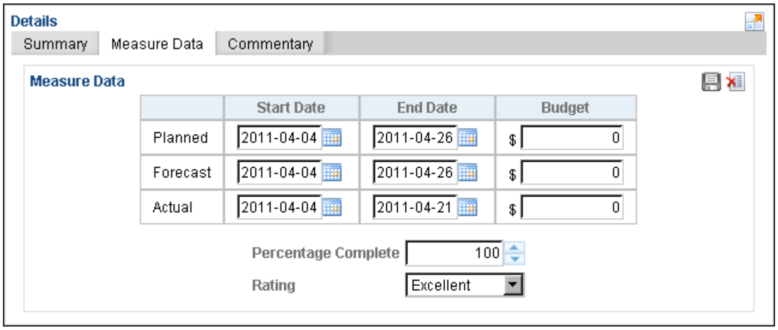


Figure 3-2 Choosing to edit measure data

3 To specify a start or end date, perform the following tasks:

1 Choose Select Date beside the appropriate planned, forecast, or actual date to open the calendar. For example, Figure 3-3 shows the calendar for the planned start date.

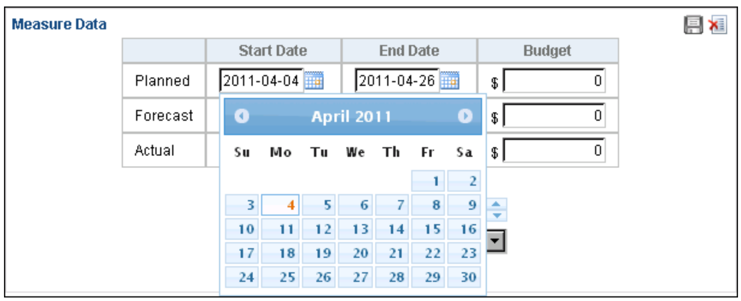


Figure 3-3 Opening the calendar

2 In the calendar, navigate to a date. Then, select the date. The new date appears, as shown in the example in Figure 3-4.

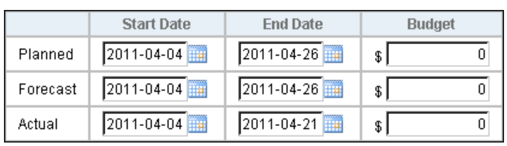


Figure 3-4 Applying a new date value

4 To specify a budget value, type a budget value for the appropriate planned, forecast, or actual date.

5 To specify the percent complete value, in Percentage Complete, type a value between 0 and 100.

6 To specify a qualitative rating, choose a rating from the Rating list.

7 Choose Save.

Entering performance commentaries for measures and initiatives

Performance commentaries provide measure owners with an opportunity to explain the reasons behind a measure or initiative’s performance or to comment about performance. You enter performance commentaries through the dashboard.

You must have commentary entry rights for a measure and location pair to enter measure commentary. With these rights, you can also add commentary to initiatives which belong to the measure and location. In addition, an administrator, measure owner, or measure owner assistant can always add commentary for initiatives which belong to the measure and location pair.

Metrics Management 10 introduces percentage-based font sizes in commentary text. Percentage-based font sizes increase when the font size is increased for a dashboard cell maximized for display purposes. Commentary formatted in previous versions of Metrics Management using point-based font sizes remains static when dashboard fonts are increased. Metrics Management supports defining the commentary text font size as 80%, 100%, or 120%.

Entering measure performance commentaries

You can enter performance commentaries in the dashboard for a measure or location selected in a book or view.

How to enter performance commentaries

1 Open a view or briefing book. If opening a view, choose Show dashboard in the toolbar.

2 Drill down to select a measure and location.

3 Use the Period box to select the period for the commentary.

4 In the dashboard, choose Commentary, as shown in Figure 3-5.

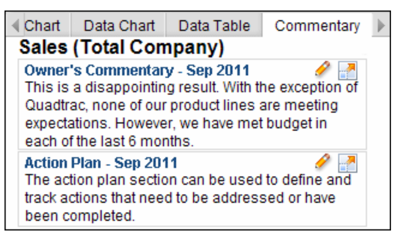


Figure 3-5 Accessing commentary

5 Choose Edit commentary beside the period for which to enter commentary. The commentary box becomes editable.

6 Type commentary in the commentary box, as shown in Figure 3-6.

If you navigate to another tab before saving, an asterisk appears beside the dashboard name to indicate that the dashboard contains unsaved changes.

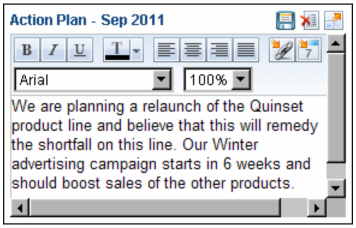


Figure 3-6 Adding commentary to a measure

7 Choose Save commentary.

The saved commentary displays the user who created the commentary, and the date and time the commentary was saved, as shown in Figure 3-7.

Figure 3-7 Saved commentary

Entering initiative performance commentaries

You can enter performance commentaries in the dashboard for initiatives which belong to a measure and location pair. Entering performance commentary in an initiative requires the appropriate privileges.

How to enter performance commentary in an initiative

1 In Overview, select an initiative for which to enter commentary.

2 In Details, in Summary, choose Add new commentary. The commentary box becomes editable.

3 Type commentary in the commentary box, as shown in Figure 3-8.

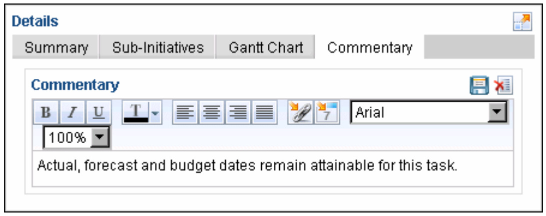


Figure 3-8 Choosing to add commentary

4 Choose Save. The commentary appears with a time stamp, as shown in Figure 3-9.

Figure 3-9 Commentary displaying a time stamp

Changing the display of initiative commentary

By default, Metrics Management displays five commentary entries for an initiative. To display the next five commentary entries, choose Show more.

How to change the display order of initiative commentary

To change the display order of initiative commentary, choose Reverse comment order. The upward pointing arrow indicates that the oldest commentary displays first. A downward pointing arrow indicates that the latest commentary displays first.

Editing a commentary entry

If Edit this commentary icon is not available, then you do not have sufficient privileges to enter commentary for the initiative.

How to edit a commentary entry

In Details➛Commentary, select Edit this comment for the commentary entry to edit.

Deleting a commentary entry

If Delete this comment is not available, then you do not have sufficient privileges to delete a commentary entry.

How to delete a commentary entry

In Details➛Commentary, select Delete this comment for the commentary entry to delete.

Formatting commentary text

Metrics Management supports formatting commentary text for measure or initiatives. For example, you can change the font text and size, specify text alignment, change the text color, create a link, and apply a date stamp to commentary.

How to format commentary text

1. In the dashboard, choose Commentary.

2. Choose Edit commentary beside the period for which to enter commentary.
3. Using the commentary toolbar, as shown in Figure 3-10, perform any of the following tasks:

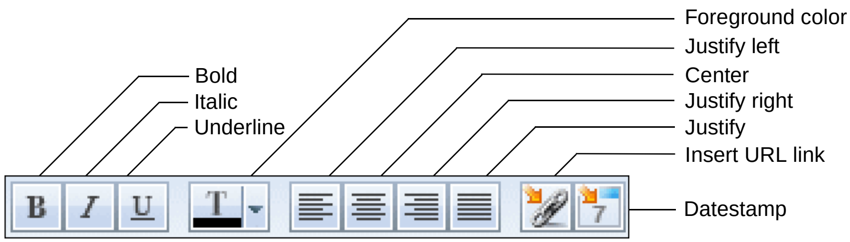


Figure 3-10 Formatting commentary text in the dashboard

- To apply formatting to the selected text, choose Bold, Italic, or Underline.
- To change the color of the selected text, choose Foreground color. In the color palette, as shown in Figure 3-11, choose a color.

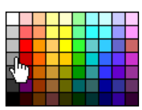


Figure 3-11 Choosing commentary text color

- To align text to the left or right margin, choose Justify Left or Justify Right.
- To align text to both the left and right margins, choose Justify.
- To center text, choose Center.
- To insert a link, choose Insert URL Link. In URL, as shown in Figure 3-12, type the URL address. Then, choose OK.

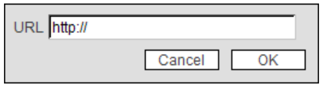


Figure 3-12 Adding a link to a commentary entry

- To insert your user name and today's date, choose Datestamp.
- To change the font of the selected text, in the font toolbar, as shown in Figure 3-13, choose Arial, Times New Roman, or Verdana.

Figure 3-13 Changing the commentary entry font

- To change the font size of the selected text, in the font toolbar, choose 80%, 100%, or 120%.

4 Choose Save commentary.

Chapter

4

Presenting your data

This chapter discusses the following topics:

- Working with initiatives
- Working with maps

Working with initiatives

Metrics Management supports creating multiple initiatives for a measure and location pair. Initiatives in a hierarchical initiative tree show relationships between initiatives. The initiative that appears at the highest level in an initiative tree is a root initiative. The root initiative for an initiative tree is always a group measure. A root initiative containing no subinitiatives is a data initiative.

Creating a subinitiative converts the parent initiative to a group initiative. A data initiative converted to a group initiative no longer contains initiative data.

Using the initiative editing toolbar

Figure 4-1 shows the initiative editing toolbar. This toolbar shows all display options available for editing an initiative tree.

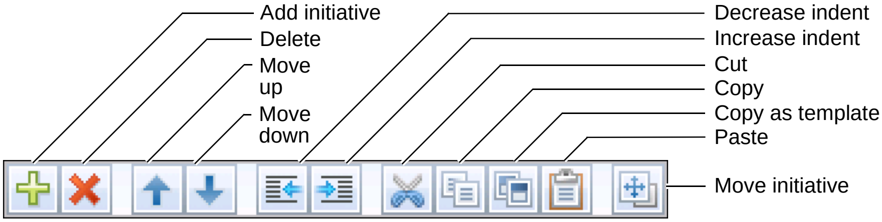


Figure 4-1 Initiative toolbar

The initiative toolbar contains the following elements:

- Add initiative
  Creates a new initiative at the next level below the selected initiative.
- Delete
  Deletes the selected initiative tree.
- Move up
  Moves the selected initiative branch up within the current level of the initiative tree.
- Move down
  Moves the selected initiative branch down within the current level of the initiative tree.
- Decrease indent
  Demotes an initiative branch to the level below that of the selected initiative.
- Increase indent
  Promotes an initiative branch to the level above that of the selected initiative.

- Cut
  Copies the selected initiative branch. When the branch is pasted, the original branch deletes.
- Copy
  Copies the selected initiative branch.
- Copy as template
  Copies the structure of the selected initiative branch.
- Paste
  Pastes the copied initiative branch.
- Move initiative
  Moves the selected initiative branch to another measure and location pair.

Creating an initiative

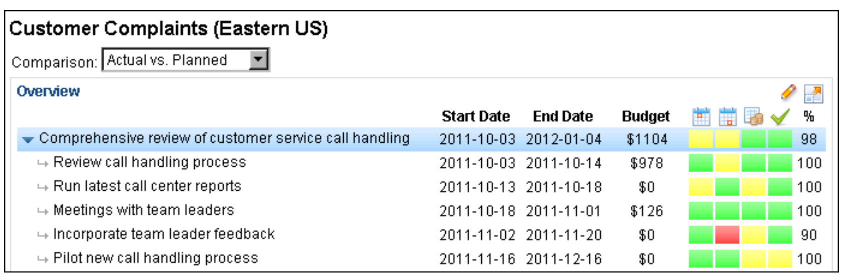
An initiative belongs to a specific measure and location pair. You must create the first initiative for a measure and location pair in the dashboard in a book, map, or view. Then, you can create additional initiatives in the dashboard or in Setup➛Initiatives. After creating an initiative or initiative tree, consider using Copy or Copy as template to create new initiatives.

How to create an initiative for a measure and location pair

1 To choose the measure and location pair in which to create a new initiative, perform one of the following tasks:

- In a book, map, or view, select a measure and location pair and open the dashboard. Then, select Initiatives.
- In Navigation Pane, select Initiatives. Then, use Search or Edit Favorites to display initiatives. In the main window, select an initiative and choose Open Initiative Detail.

2 In Overview, choose Edit. Figure 4-2 shows initiatives for the Customer Complaints measure at the Eastern US location.



	Start Date	End Date	Budget	%
Comprehensive review of customer service call handling	2011-10-03	2012-01-04	$1104	98
Review call handling process	2011-10-03	2011-10-14	$978	100
Run latest call center reports	2011-10-13	2011-10-18	$0	100
Meetings with team leaders	2011-10-18	2011-11-01	$126	100
Incorporate team leader feedback	2011-11-02	2011-11-20	$0	90
Pilot new call handling process	2011-11-16	2011-12-16	$0	100

Figure 4-2 Initiatives for the Customer Complaints measure

The initiative toolbar appears, as shown in Figure 4-3.

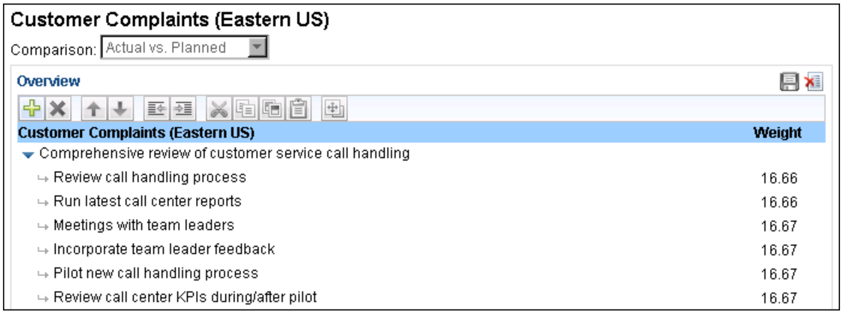


Figure 4-3 The initiatives editing toolbar

3 To create a new initiative, perform one of the following tasks:

- To create a root initiative, select the measure and location name below the toolbar, and choose Add initiative. The new initiative appears at the top level, as shown in Figure 4-4.

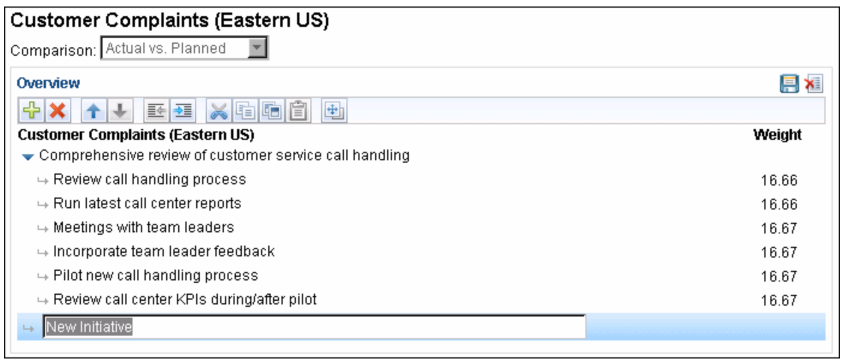


Figure 4-4 Creating a root initiative

- To create a subinitiative, select an existing initiative, and choose Add initiative. In Figure 4-5, the new initiative is created as a subinitiative of the Review call handling process initiative.

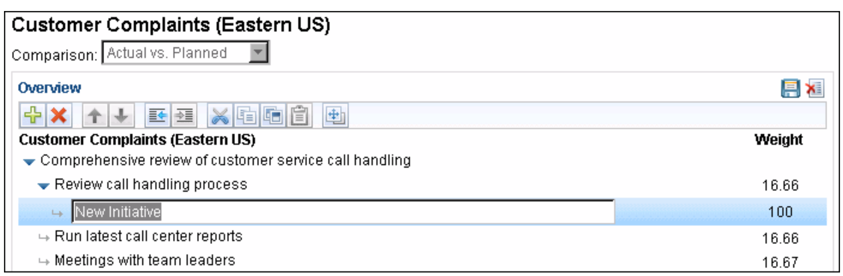


Figure 4-5 Creating a subinitiative

4 Type a name for the new initiative.

5 Choose Save.

Using Copy to create an initiative

Copy or Cut copies all initiatives and initiative data from the selected branch. Initiative data includes the initiative name, description, data, and commentary.

Pasting an initiative below a data initiative converts the parent initiative to a group initiative.

How to cut, copy and paste an initiative

1. In Overview, choose Edit. Then, select an initiative.
2. Perform one of the following tasks:
   - To copy the selected initiative, choose Copy.
   - To copy and delete the selected initiative, choose Cut.
3. To create a copy of the initiative, choose Paste. The copied initiative or initiative branch is created as a subinitiative of the selected initiative.
4. Choose Save.

Using Copy as template to create an initiative

Copy as template copies all initiatives in the selected branch. For each initiative, Copy as template copies the initiative name, description, subinitiatives, and subinitiative weightings.

Pasting an initiative below a data initiative converts the parent initiative to a group initiative.

How to copy an initiative as a template

1. In Overview, choose Edit. Then, select an initiative.
2. Choose Copy as template.
3. To create a copy of the initiative, choose Paste. The initiative or initiative branch is created as a subinitiative of the selected initiative.
4. Choose Save.

Moving an initiative in an initiative tree

You can move an initiative or initiative branch in the tree in the following ways:

- Up or down within one level in the hierarchy
- Up or down to another branch in the tree

Moving an initiative under a data initiative converts the parent initiative to a group initiative.

How to move an initiative up or down within one level in the hierarchy

1 In Overview, choose Edit. Then, select an initiative.

2 Perform one of the following tasks:

- To move the selected initiative higher within the selected branch, choose Move Up.
- To move the selected initiative lower within the selected branch, choose Move Down.

3 Choose Save.

How to promote or demote a initiative branch in an initiative tree

1 In Overview, choose Edit. Then, select an initiative.

2 Perform one of the following tasks:

- To move the selected initiative branch up to the next highest level in the tree hierarchy, choose Decrease indent.
- To move the selected initiative branch down to the next lowest level in the tree hierarchy, choose Increase indent.

  In the example shown in Figure 4-6, the Pilot new call handling process initiative is demoted to a subinitiative of the Incorporate team feedback initiative.

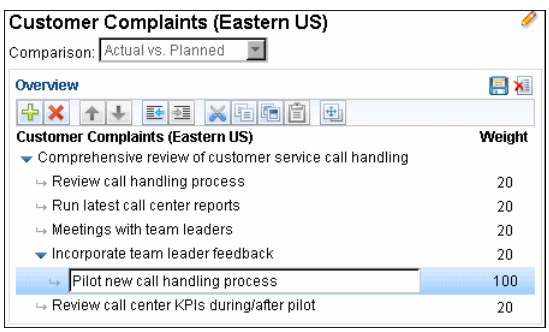


Figure 4-6 Demoting an initiative

3 Choose Save.

How to move an initiative or initiative branch to another measure

Moving an initiative to another measure and location pair deletes the initiative from the original measure and location pair.

1 In Overview, choose Edit. Then, select an initiative or initiative branch.

2 In Select measure and location, in Measure, choose Edit. Select a measure, as shown in Figure 4-7. Then, choose Save.

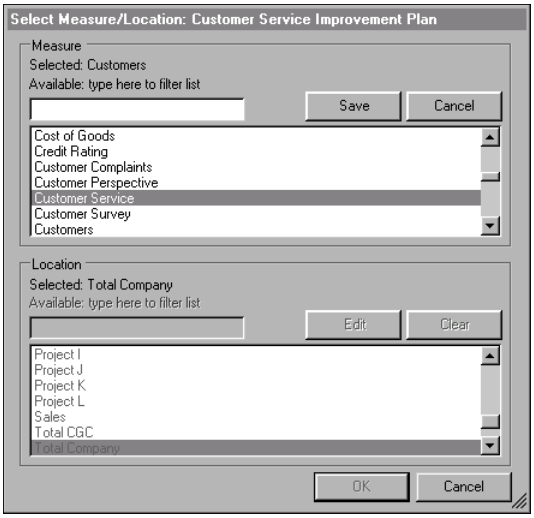


Figure 4-7 Selecting a measure

3 In Location, choose Edit. Select a location, as shown in Figure 4-8. Then, choose Save.

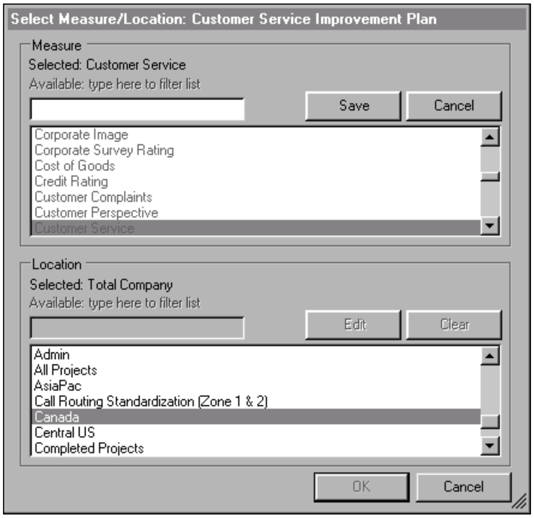


Figure 4-8 Selecting a location

4 Choose OK.

5 Choose Save. The branch moves to the new measure and location pair.

How to delete a initiative

Deleting an initiative also deletes all of the initiative's subinitiatives.

1 In Overview, choose Edit. Then, select an initiative.

2 Select an initiative.

3 From the initiative toolbar, choose Delete.

4 Choose Save.

Modifying an initiative name and description

Metrics Management supports modifying an initiative name and description.

How to modify an initiative name and description

1 In Overview, select an initiative to edit.

2 In Details, in Summary, choose Edit, as shown in Figure 4-9.

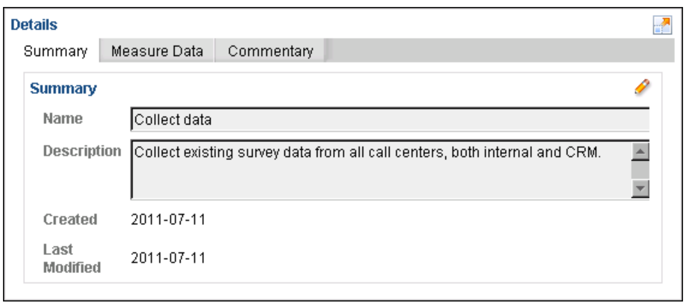


Figure 4-9 Choosing to edit an initiative

3 Modify the name and description, as shown in Figure 4-10.

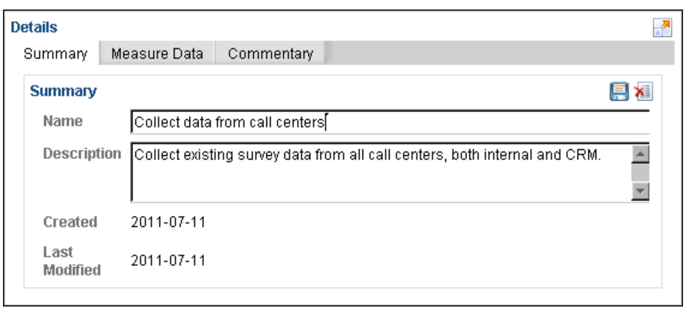


Figure 4-10 Editing an initiative name

4 Choose Save. The last modified date updates in Summary.

Changing subinitiative weights

For a group initiative, assign weights to the subinitiatives. The weights must equal 100%. By default, subinitiatives are equally weighted. If a subinitiative is deleted from a measure, the remaining subinitiatives become equally weighted, regardless of previous weightings.

How to change subinitiative weights

1 In Overview, select an initiative to edit.

2 In Details, in Subinitiative, choose Edit, as shown in Figure 4-11.

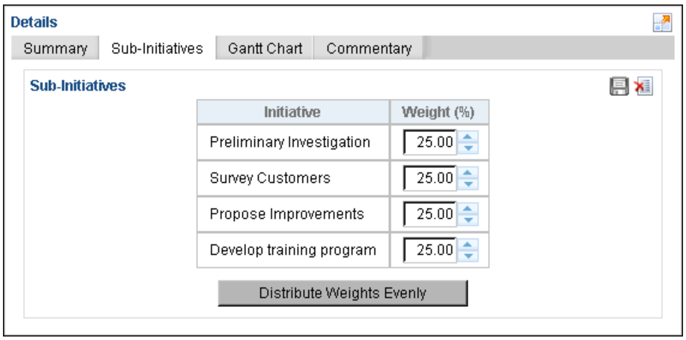


Figure 4-11 Choosing to edit subinitiative weights

3 Assign weights in one of the following ways:

- Enter values for the subinitiatives, ensuring that the total weight equals 100%, as shown in Figure 4-12.
- To equally weight the subinitiatives, choose Distribute Weights Evenly.

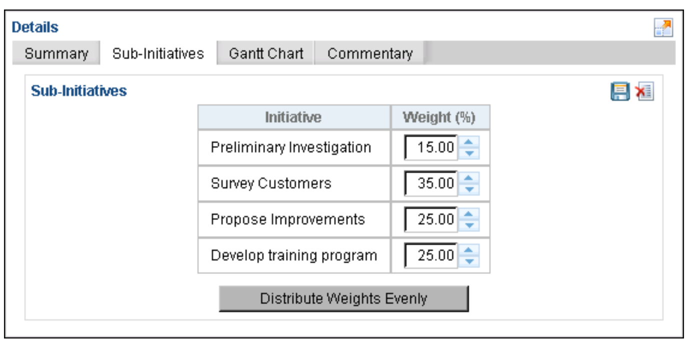


Figure 4-12 Specifying subinitiative weights

4 Choose Save.

Hiding an initiative

Hiding an initiative makes the initiative hidden in the dashboard. Consider hiding initiatives when the task which the initiative relates to is no longer relevant. For example, hide an initiative that applies to a project that has completed. Only a root initiative can be hidden. Hiding a root initiative hides the entire branch.

A hidden initiative is not hidden on the home page or in Navigation Pane in My Favorite Initiatives.

How to hide an initiative

1 Select a root initiative.

2 In Details, in Summary, choose Edit.

3 Select Hide initiative, as shown in Figure 4-13.

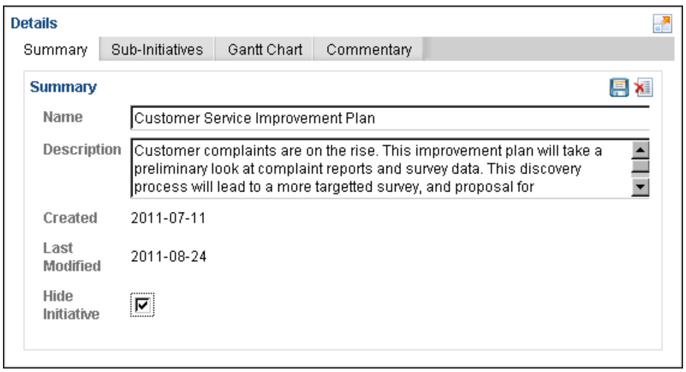


Figure 4-13 Hiding an initiative

4 Choose Save.

Working with maps

You can use maps to create graphical representations of performance beyond the causal hierarchy of a view display. When you create a map, you can place links to performance information onto the diagram of your choice. Typical examples include strategy maps, process maps, geographical maps, and cause and effect diagrams. However, these represent only a fraction of what you do with maps.

From the measures on the diagram, you can drill into underlying performance information in a personalized hierarchical view display. To display in-depth performance information regarding the currently selected item, open the dashboard.

For each map node, you can link to other Metrics Management objects, such as books or views, or to external content such as web pages or documents, as shown in Figure 4-14.

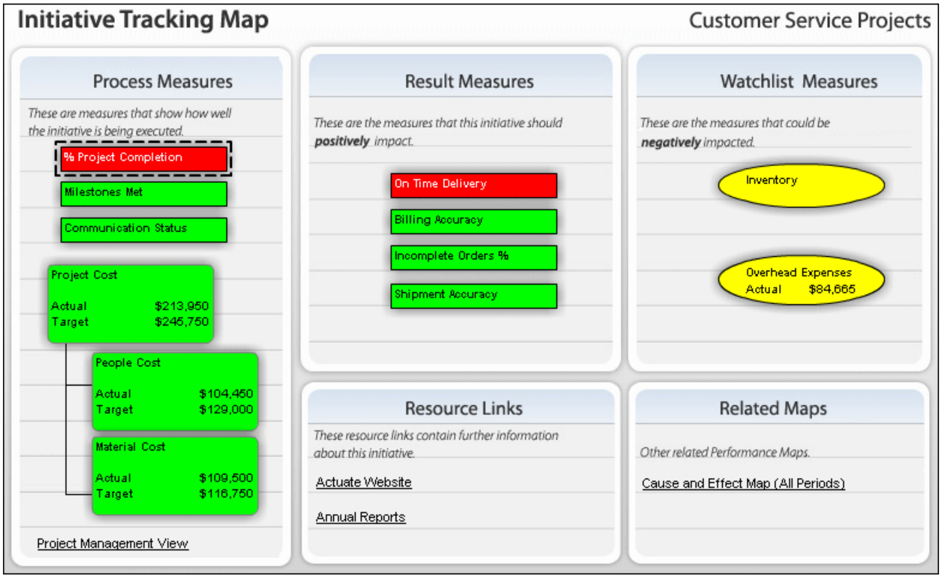


Figure 4-14 Map with diagrams

About creating a map

Creating a map requires the Windows Client or Metrics Manager. In these clients, the map owner creates a map and specifies map properties. For example, the map owner provides a map name, specifies the view from which to add measures and locations to the map, and defines default map shapes and colors for the Map Designer. The Map Designer is available from any client. Use the Map Designer to add visual elements to the map. For example, add a geographic map as a map background image and place measure and location pairs on the image.

Editing a map in the Map Designer

Map Designer, as shown in Figure 4-15, is the visual tool you use to create maps. In Map Designer, you can add measure and location boxes and text boxes, and use lines and arrows to create a relationship between the boxes. You can also add a background image to the map, change the map size, and specify the default measure and location or text box selection.

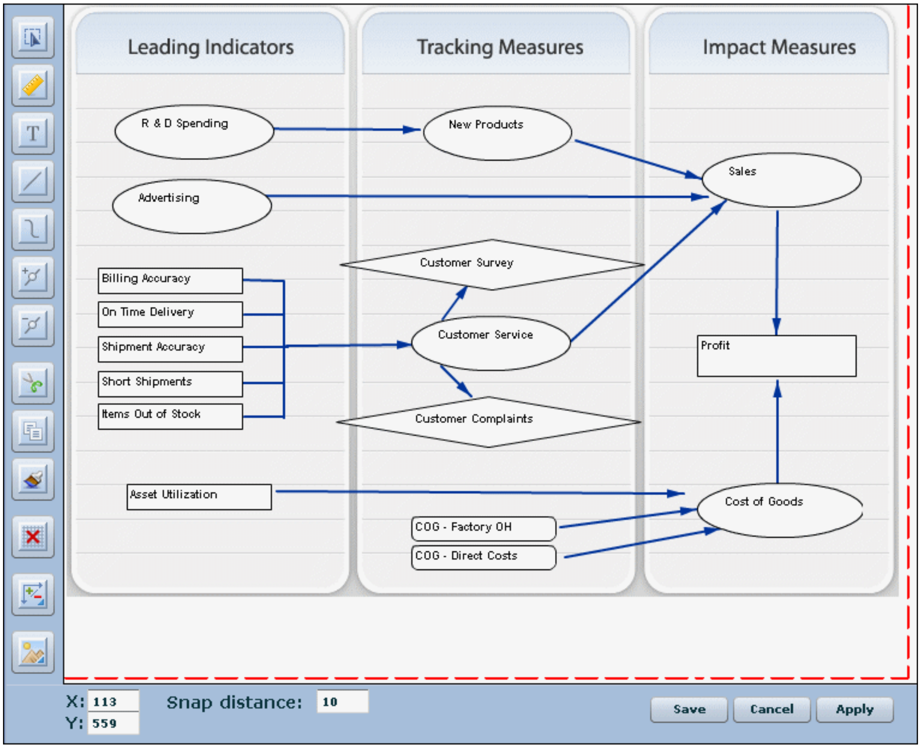


Figure 4-15 Map Designer

Figure 4-16 shows the Map Designer toolbar.

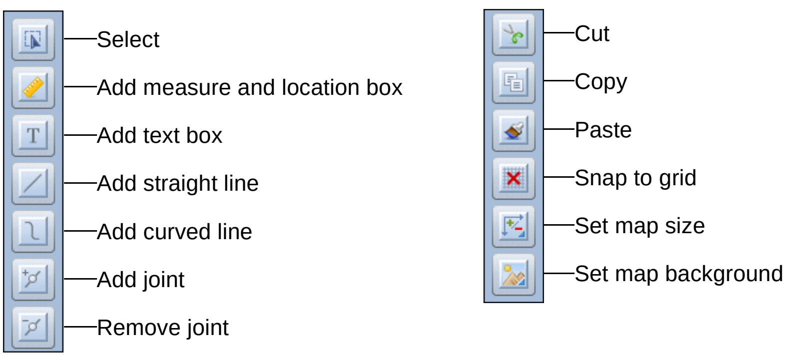


Figure 4-16 Map Designer toolbar

How to undo or redo a map action in the Map Designer

Maps support undoing or redoing a change made to a map in the Map Designer. To undo a change, right-click and choose Undo action, as shown in Figure 4-17. To reverse an undo action, right-click and choose Redo action.

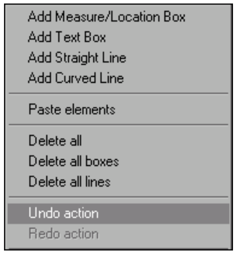


Figure 4-17 Choosing to undo a map action

How to open a map in the Map Designer

1. In Navigation Pane, choose Maps➛My Favorite Maps.
2. Select a map. The map opens in the main window.

3. In the main window, choose Design Map. The map opens in the Map Designer.

Defining a map background

You can add a background image and a background color to a map. A background image can give context to measure and location boxes. For example, use a strategy map image containing rows that you can add specific measures and locations to when you design the map.

You can also define a color as a map background. If you use both a background image and color, the image displays on top of the background color.

How to add a background image to a map

1. In the Map Designer toolbar, choose Set Map Background.
2. In Map background, select an image from the list. A preview of the image appears, as shown in Figure 4-18.

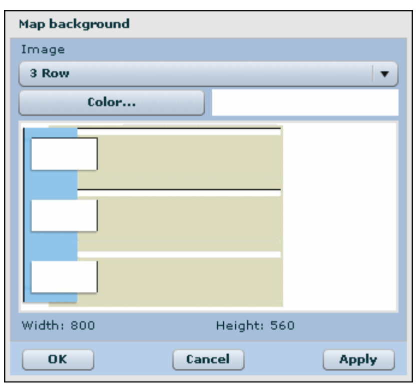


Figure 4-18 Choosing a background image

3 To define a background color, perform the following tasks, then choose OK:

   1 Choose Color.

   2 In Select color, select All colors, Shades of gray, or Standard Metrics Management index range colors.

   3 Choose the color box and select a color from the palette.

4 Choose OK.

Changing the size of a map

In the Map Designer, the dashed red line indicates the size of map. You can provide pixel values to manually increase or decrease the size of the map. Alternatively, you can permit Metrics Management to resize the map area. Metrics Management adjusts the map area to accommodate either the maximum size of the image in the map background, or map objects that are outside of the background area.

How to change the size of a map

1 Choose Set Map Size.

2 In Map size, perform one of the following tasks:

   - To manually change the map size, deselect Automatic in Width and Height, and change the pixel values in Pixels.

   - To allow Metrics Management to adjust the size of the map area, select Automatic in both Width and Height, as shown in Figure 4-19.

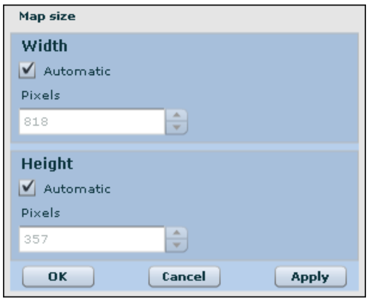


Figure 4-19 Choosing to permit Metrics Management to adjust the map size

3 Choose OK.

Creating a measure and location box

You can add a measure and location box to a map, and specify settings for the box. Measures or locations can be unavailable to measure and location boxes, depending on the choices made in Map Contents in Setup➛Maps in the Windows client. Depending on Map Contents settings, you can choose to define the following items for a measure and location box:

- The top measure and location, or a specific measure and location
- The selected period, a computed period, or a specific period
- The selected comparison series, or a specific comparison series
- The font, color, and shape of the box
- The display contents of the box

By default, a measure and location box displays text and performance indicator colors that are defined for the database. Before specifying a personalized font or background color for a measure and location box, override the database settings by deselecting Show measure and location performance colors in View Options.

Additionally, you can hide measure and location information to create a performance dot, which resembles a traffic light, to the map to align performance with background images. For example, use a country map as a map background, and add performance dots to the map to represent the performance of cities.

How to add a measure and location box to a map

You can choose a measure and location for an individual measure and location box. The Measure or Location list can be unavailable depending on the choices made by the user who created the map in the Windows Client. You can also create a box attachment, such as a briefing book or view.

1. Choose Add Measure and Location Box.
2. Click on the map to add the measure and location box.
3. Double-click the measure and location box.
4. In Measure and location box properties, choose a top measure and top location, as shown in Figure 4-20.

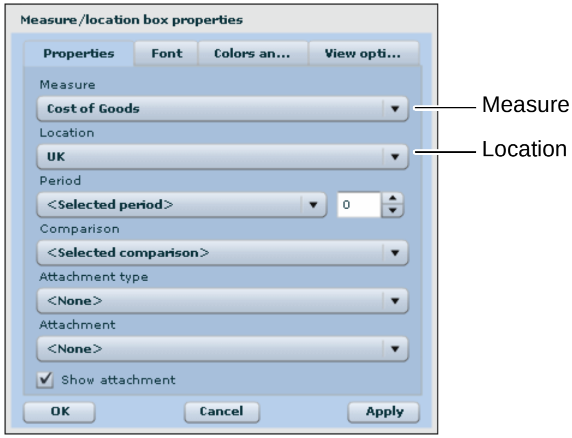


Figure 4-20 Choosing a measure and a location

5 To add a link to an object such as a briefing book or view:

   1 Select a type of object from the Attachment type list.

   2 Select an object from the Attachment list.

   3 Select Show attachment to show the link in the box. If the link is longer than the measure and location box, deselect Show attachment to hide the link. A map user opens a hidden link by right-clicking to open the menu.

6 Choose Apply.

How to define a comparison series or period for a measure and location box

You can create a specific period or a computed period for a measure and location box. A specific period is static and does not change when a user changes the period in a map. A computed period is the selected period in the map plus or minus a value that you specify. For example, if the computed period is defined as –1, and the selected period is February 2011, the computed period is January 2011.

You can use specific or computed periods to show trends from one period to another on one map. For example, create multiple measure and location boxes with the same measure, but with differing periods to show trends in sales.

You can also define a specific comparison series for a measure and location box. The comparison series does not change when a user changes the comparison series in a map. Choose a specific comparison series to show measures and locations with different comparatives, for example Actual vs. Target and Actual vs. Last Year for the same measure, on one map.

1 To assign a specific period to this measure and location, select a period from the Period list, as shown in Figure 4-21.

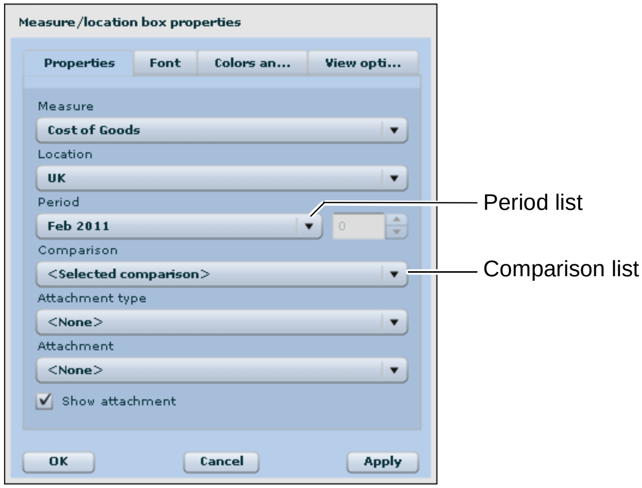


Figure 4-21 Choosing February 2011 as the selected period

2 To assign a computed period to this measure and location, select a period from the Period list, and provide a numeric value, as shown in Figure 4-22.

Figure 4-22 Choosing a computed period of the selected period minus one

3 To assign a specific comparison series for a measure and location, select a comparison series from the Comparison list.

4 Choose Apply.

How to specify font settings for a measure and location box

1 In Measure and location box properties, choose View options. Deselect Show measure and location performance colors.

2 In Measure and location box properties, choose Font.

3 Select a font, font style, and font size, as shown in Figure 4-23.

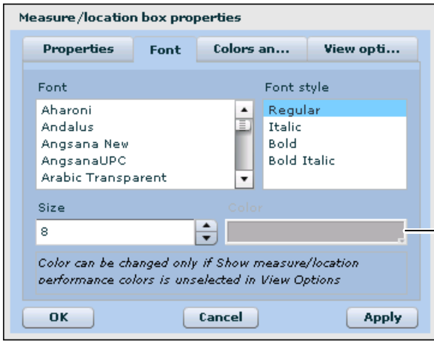


Figure 4-23 Specifying the font for a measure and location box

4 To choose a font color, choose the color box and select a color from the palette.

5 Choose Apply.

How to specify color and shape of a measure and location box

You can define the color, shape, border, relative positioning, and size of a measure and location box.

1 In Measure and location box properties, choose Colors and Shapes, as shown in Figure 4-24.

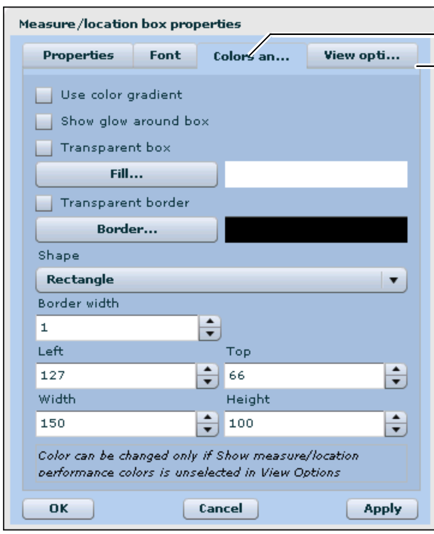


Figure 4-24 Specifying the appearance of a measure and location box

2 To apply a drop shadow to the box, select Show glow around box.

3 To make the box background transparent, select Transparent box. To make the box border transparent, select Transparent border.

4 To define a background color for the box, perform the following tasks:

   1 Choose View options. Deselect Show measure and location performance colors.

   2 Choose Fill.

   3 In Select color, select All colors, Shades of gray, or Standard Metrics Management index range colors.

   4 Choose the color box, and select a color from the palette, as shown in Figure 4-25. Then, choose OK.

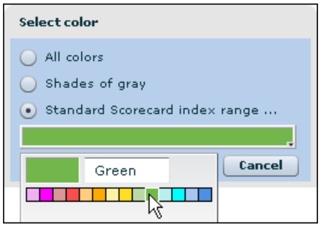


Figure 4-25 Specifying the color of a measure and location box

   5 To apply a gradient to the color, select Use color gradient.

   6 Choose OK.

5 To define a border color for the box, perform the following tasks:

   1 Choose Border.

   2 In Select color, select All colors, Shades of gray, or Standard Metrics Management index range colors.

   3 Choose the color box and select a color from the palette.

   4 Choose OK.

6 To change the box shape, select a shape from the Shape list.

7 To change the width of the box border, change the value in Border width.

8 To adjust the position of the box relative to the top left of the map, provide values in Left and Top.

9 To adjust the size of the box, provide values in Width and Height.

10 Choose Apply.

How to specify the display contents of a measure and location box

You can specify what to display in a measure and location box, such as the measure name, and the base and comparison series.

1. In Measure and location box properties, choose View options, as shown in Figure 4-26.
2. To specify display options for the measure and location box, perform any of the following tasks:
   - To display the measure's name, select Show measure name.
   - To display the location's name, select Show location name.
   - To display the period, select Show period name.
   - To display the measure and location's performance color as the box background color, select Show measure and location performance colors.
   - To display colored arrows that indicate the performance of the worst performing submeasure and sublocation in the view structure, select Show measure and location performance indicators. Performance indicators do not display in generated maps if the measure or location is the lowest in the view branch.

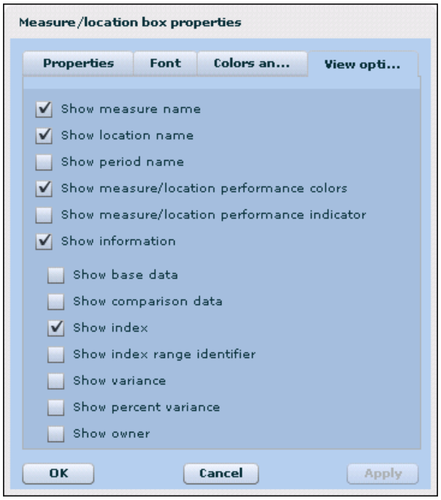


Figure 4-26 Selecting information to appear in a measure and location box

3. To show measure and location information in the box, select Show information, and then perform any of the following tasks:
   - To display the measure's base data value, select Show base data.
   - To display the measure's comparison data value, select Show comparison data.

- To display the measure's index value, select Show index.
- To display a text representation of the measure's index value, select Show index range identifier.
- To display the variance for a data or formula measure, select Show variance.
- To display the percentage variance for a data or formula measure, select Show variance.
- To display the measure owner, select Show owner.

4 Choose OK.

How to create a performance dot

1 Add a measure and location box to the map.

2 Double-click the measure and location box.

3 In Measure and location box properties, choose Colors and Shapes, and select Circle from the Shape list.

4 Choose View options, and deselect all check boxes, except Show measure and location performance colors.

5 Choose OK.

6 Resize the measure and location box.

Creating a text box

Add the text box to the map, and define the text box properties, such as font and font size, and text box background color.

Optionally, create a link to a Metrics Management object, for example a book or view. Consider creating a hidden link if the attached object's name is longer than the text box. A map user opens a hidden link by right-clicking and selecting Launch link from the shortcut menu.

How to add a text box to a map

1 Choose Add Text Box.

2 Click a location on a map where you want a text box to appear.

3 Double-click the box.

4 In Text box properties, type text that will appear in the text box.

5 To define text alignment, in Text Alignment, choose Left, Center, or Right, as shown in Figure 4-27.

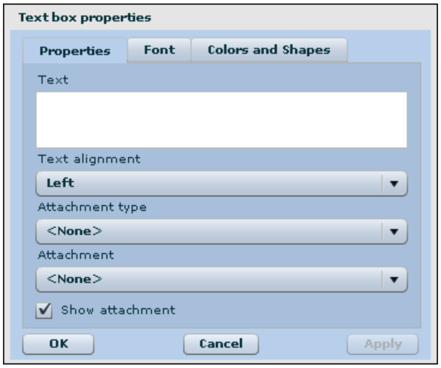


Figure 4-27 Specifying text appearance in a text box

6 To add a link to a Metrics Management object, perform the following tasks:

   1 Select a type of object from the Attachment type list.

   2 Select an object from the Attachment list.

   3 To show attachment as a link, select Show attachment. The link displays the object's name in the map. To create a hidden link, deselect Show attachment.

How to specify font settings for a text box

1 To specify font settings for a text box, choose Font.

2 Select a font, font style, and font size, as shown in Figure 4-28.

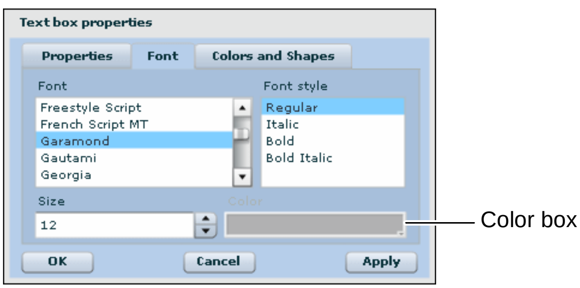


Figure 4-28 Specifying the font for a text box

3 To choose a font color, choose the color box and select a color from the palette.

4 Choose Apply.

How to specify color and shape of a text box

1 To define the color and shape properties of the text box, choose Colors and shapes, as shown in Figure 4-29.

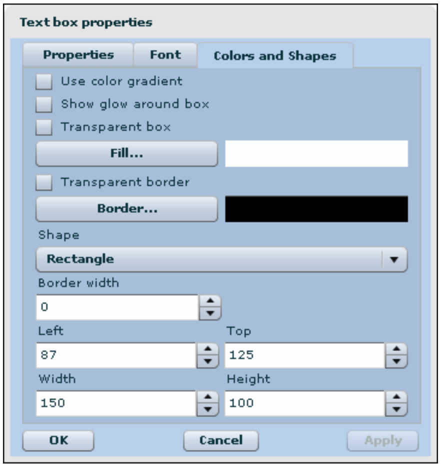


Figure 4-29 Specifying the appearance of a text box

2 To apply a drop shadow to the box, select Show glow around box.

3 To make the box background transparent, select Transparent box. To make the box border transparent, select Transparent border.

4 To define a background color for the box, perform the following tasks:

1 Choose Fill.

2 In Select color, select All colors, Shades of gray, or Standard Metrics Management index range colors.

3 Choose the color box, and select a color from the palette, as shown in Figure 4-30. Then, choose OK.

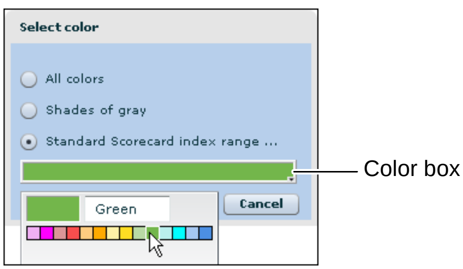


Figure 4-30 Specifying the color of a text box

4 To apply a gradient to the color, select Use color gradient.

5 Choose OK.

5. To define a border color for the box, perform the following tasks:
    1. Choose Border.
    2. In Select color, select All colors, Shades of gray, or Standard Metrics Management index range colors.
    3. Choose the color box, and select a color from the palette.
    4. Choose OK.
6. To change the box shape, select a shape from the Shape list.
7. To change the width of the box border, change the value in Border width.
8. To adjust the position of the box relative to the top left of the map, provide values in Left and Top.
9. To adjust the size of the box, provide values in Width and Height.
10. Choose Apply, then choose OK.

Specifying the default measure and location or text box selection

Metrics Management supports specifying which measure and location or text box is selected when a map opens. Consider specifying a default measure and location box to ensure that the map does not show a blank dashboard when opened.

How to specify the default measure and location or text box

Right-click a measure and location or text box and select Set as default node, as shown in Figure 4-31.

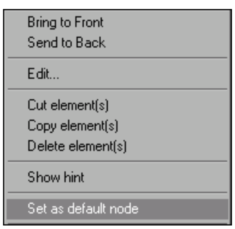


Figure 4-31 Choosing to define the default measure and location box

How to locate the default measure and location or text box

To locate the default measure and location or text box, right-click the map and select Go to default node, as shown in Figure 4-32. To specify no default node, choose Clear default node.

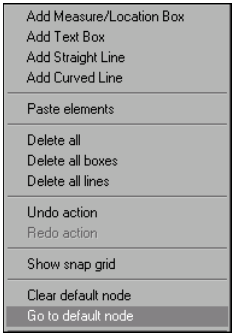


Figure 4-32 Locating the default measure and location box

Adding a line to a map

You can add a line to a map and define properties for it. You can change the position of a line on the map, change the line width, style, and color, and add or remove arrows from a line.

How to add a line to a map

1 Select one of the following line shapes:

- To create a straight line segment, choose Add straight line.

- To create a curved line segment, choose Add curved line.

2 Click the map to add the line.

3 To set properties of a line segment, double-click the selected line segment.

4 In Line properties, shown in Figure 4-33, perform any of the following tasks:

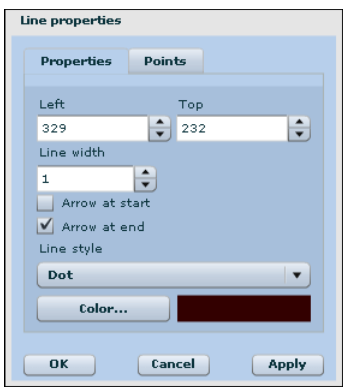


Figure 4-33 The line properties dialog box

- To adjust the position of the line relative to the top left of the map, provide values in Left and Top.

- To change the width of the line, provide a value in Line width.
- To add an arrow to the line, select Arrow at start or Arrow at end.
- To change the style of the line, select a style from the Line style list. Line styles are not available for curved lines.
- To change the color of the line:
    1. Choose Color.
    2. In Select Color, select All colors, Shades of gray, or Standard Metrics Management index range colors.
    3. Choose the color box, and select a color from the palette.
    4. Choose OK.

5 Choose OK.

How to connect a line to a map object

You can precisely connect a line to a map object.

1 Select the line to connect to a map object.

2 Move the mouse cursor over one end of the line until the cursor turns into cross hairs, as shown in Figure 4-34.

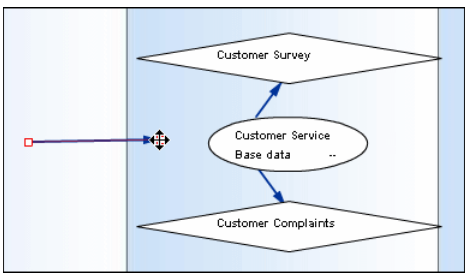


Figure 4-34 Selecting a line

3 Click and drag the end of the line toward the box until a purple outline appears around the box, as shown in Figure 4-35.

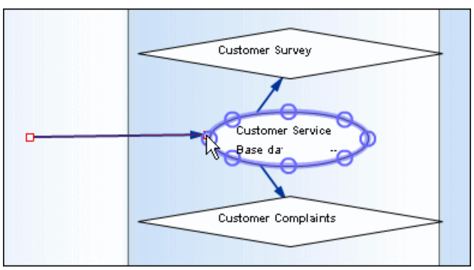


Figure 4-35 Dragging a line towards a box

4 Release the line. The end of the line connects to the edge of the box.

How to change point coordinates in a line

To change the position of the line on the map by adjusting each point individually, choose Points and change the X and Y value for each point you want to change.

At the bottom of the Map Designer, the X and Y values show the position of the cursor, where X=0 at the left of the page and Y=0 at the top of the page. As you move the cursor to the right, the value of X increases, and as you move down, the value of Y increases.

How to add a joint to a line

You can use a joint to angle a straight line or to add another curve to a curve line.

1 Choose Add Joint.

2 Move the cursor over the place on the line on which to add the joint.

   When the cursor turns red, select the line, as shown in Figure 4-36. The joint is added to the line.

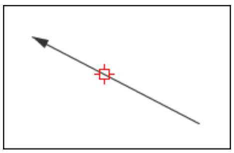


Figure 4-36 Adding a joint to a line

3 To change the angle between two joint-line segments, select the joint and drag it to a new location, as shown in Figure 4-37.

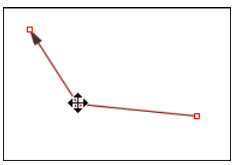


Figure 4-37 Creating an angle in a line

How to remove a joint in a line

1 Choose Remove Joint.

2 Select the line from which to remove a joint.

3 Move the cursor over the joint to remove.

4 When the cursor turns red, choose the joint, as shown in Figure 4-38.

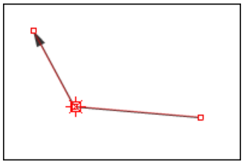


Figure 4-38 Removing a joint

The joint is removed from the line.

Aligning map objects to the grid

You can use snap to grid to align measure and location boxes, text boxes, and lines to a grid on the map. You can show or hide the grid and change the grid size. Boxes and lines snap to the grid as follows:

- The top-left corner of a box snaps to the closest grid-line intersection.
- The left end-point of a straight line snaps to the closest grid-line intersection.
- The top-left corner of a rectangle that would enclose an entire curved line snaps to the closest grid-line intersection.
- New map objects do not align to the grid until you choose Snap to Grid.

You can also show the X and Y coordinates, width, and height for an object on the map, such as a measure and location box or a line.

How to show or hide the grid

Right-click the map and choose Show snap grid, as shown in Figure 4-39, or Hide snap grid.

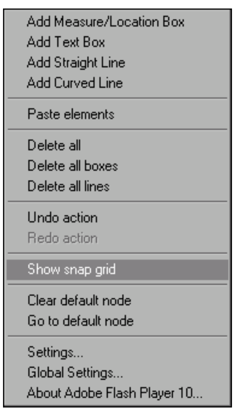
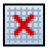


Figure 4-39 Choosing to show the map grid

How to change the size of the grid

In the bottom toolbar, provide a value in Snap distance to increase or decrease the pixel size between lines in the grid. You can enter a pixel value between 0 and 99. Decrease the pixel value to align boxes and lines with a high degree of precision.

How to align map objects to the grid



Choose Snap to Grid. All objects on the map align to the grid. To align a new map object to the grid, choose Snap to Grid again.

How to show an object's X and Y coordinates on a map

1 In the Map Designer, select an object, for example a measure and location box.

2 Right-click and choose Show hints, as shown in Figure 4-40.

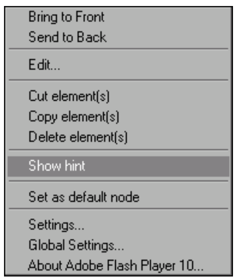


Figure 4-40 Choosing to show map hints

3 In Figure 4-41, the hint box displays the X and Y coordinates, width, and height for a measure and location box.

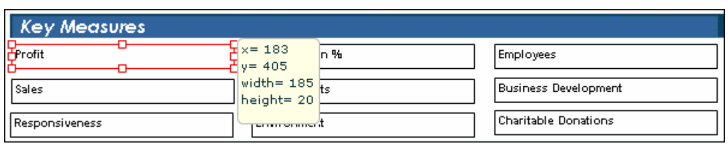


Figure 4-41 Showing hints for a measure location pair

4 Click outside the object to turn hints off.

Act as an Administrator

A privilege which grants a user full administrator status. This privilege allows the user to make any change in Metrics Management, except modifying sysadmin settings.

Related terms
Metrics Management system specialist, user privilege

action

An object security or user privilege setting that allows or denies a user from performing an activity on an object. For example, a Metrics Management system specialist allows a user the Edit action on a book. Actions vary depending on object type. An undefined action is denied.

Related terms
object-level security, user privilege

actual series

A type of comparative data. Metrics Management typically compares actual data against target data for a specific period to produce an index value.

Related terms
Metrics Management, comparative, comparison series, index value, target

Contrast with
base series

Actuate BIRT data object

A collection of BIRT cube and data set definitions created from one or more data sources using BIRT Designer Professional. Dashboards supports displaying BIRT data objects in charts, cross tabs, Flash gadgets, and tables. Interactive Crosstabs supports analyzing cube data in a BIRT data object.

Related terms
Dashboards, Actuate Interactive Crosstabs

Actuate BIRT iHub

A stand-alone server or a cluster of servers that stores report documents in an Encyclopedia volume, manages user information, handles report requests, and analyzes and delivers report documents. BIRT iHub supports BIRT reports. Several options providing additional functionality for BIRT iHub require separate purchase. Actuate BIRT iHub Integration Technology extends BIRT iHub functionality

Related terms

Business Intelligence and Reporting Tools (BIRT), Encyclopedia volume, report

Contrast with

Configuration Console, Information Console, Management Console

Actuate Interactive Crosstabs

A tool that provides interactivity to a BIRT cross tab and supports data analysis. Data analysis tasks include filtering, formatting, organizing, sorting, and viewing data, and performing calculations in a cross tab. Actuate Dashboards, Actuate BIRT Interactive Viewer, and Actuate Report Studio support using Interactive Crosstabs.

Related terms

Dashboards, Actuate Report Studio, data, Encyclopedia volume, filter

Contrast with

Actuate BIRT data object

Actuate BIRT Interactive Viewer

A component that supports viewing a BIRT report and changing the appearance and layout of report items after the report has run. For example, the user can update the sorting and grouping options, modify the data formatting, and revise the filtering options.

Related terms

Business Intelligence and Reporting Tools (BIRT), data, filter, group, report

Contrast with

Actuate Report Studio

Actuate Metrics Management (Metrics Management)

A performance management application used to display organizational performance from multiple perspectives. For example, Metrics Management can display performance data from a customer or financial perspective. Metrics Management can be used with any performance management methodology, including Balanced Metrics Management and Six Sigma. Metrics Management uses increments called measures to quantify various aspects of an organization, and consolidates the information in a way that is meaningful to the organization. There are multiple versions of Metrics Management, supporting workgroup deployments to enterprise implementations.

Related terms
Balanced Metrics Management, measure, performance management, Six Sigma

Actuate Report Studio

A tool that supports designing Actuate BIRT reports without requiring knowledge of SQL (Structured Query Language) or a programming language.

Related terms
Business Intelligence and Reporting Tools (BIRT), SQL (Structured Query Language)

Actuate SQL

A query language based on the ANSI SQL-92 standard. Information objects encapsulate Actuate SQL queries.

Related terms
information object, query, SQL (Structured Query Language)

administrator

A user who is able to perform administrative tasks on a system or application.

1. A member of the Windows Administrators group.
2. In BIRT iHub System, a member of the Administrator security role.
3. In Metrics Management, the system specialist user.

Related term
security role

audit log A log that contains information about changes to objects in a Metrics Management database.

Related term
Actuate Metrics Management (Metrics Management)

Contrast with
audit query

audit query

The set of criteria that Metrics Management uses to produce an audit log.

Related terms
Actuate Metrics Management (Metrics Management), audit log

authentication

A mechanism that validates a user’s login information.

Contrast with
authentication method

authentication method

The method used to authenticate users who want to log in to Metrics Management. The available authentication methods include the Standard and Metrics Management authentication methods. Each method references a security list when the system validates a user's login information.

Related terms
Actuate Metrics Management (Metrics Management), authentication

Balanced Metrics Management

A performance management concept that measures whether the activities of a company are meeting its objectives in terms of vision and strategy. Balanced Metrics Management provides a comprehensive view of financial outcomes and human issues in a business. This data supports taking actions that further the organization's ability to act in its long-term interests.

Related terms
Actuate Metrics Management (Metrics Management), performance management

Contrast with
Six Sigma

base series

A series that Metrics Management compares against a comparison series to calculate index values for a measure. A view contains one base series and can contain multiple comparison series.

Related terms
Actuate Metrics Management (Metrics Management), index value, measure, view

Contrast with
actual series, comparison series, target

beyond completed period

A period, which is after the completed period, for which users can enter estimated or incomplete data. This period is defined by a system specialist and is marked with an asterisk (*) on reports and in data tables.

Related terms
completed period, direct data entry, period range

Contrast with
current period, locked period

briefing book

A collection of measures and locations, organized by individual sections, which are tabs in the book.

Related terms
location, measure, section

Business Intelligence and Reporting Tools (BIRT)

An analytics and reporting platform built on Eclipse, the industry standard for open source software development. BIRT provides a complete solution for extracting data and presenting the results in a formatted document.

category

1. In Metrics Management, a label that can be used to administer and manage large groups of objects. For example, a briefing book section can use a filter that gets all measures that contain a specific category, such as the Finance category.
2. In Dashboards, one of the discrete values that organizes the data on an area, bar, bubble, column, line, step, or stock chart axis. A category axis does not use a numeric scale. Typically, category values appear on the *x*-axis of a chart. In a pie chart, category values define which sectors appear in a pie, as shown in Figure 5-1.

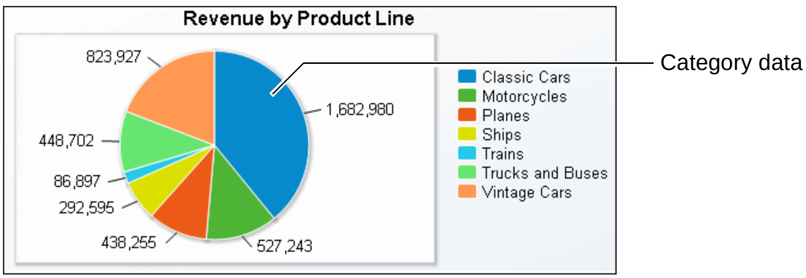


Figure 5-1 Category data

Related terms
briefing book, filter, measure, object, section

commentary

An explanation that appears in the dashboard. Typically, the measure owner uses commentary to communicate information that pertains to the performance of a measure or initiative.

Related terms
commentary type, dashboard, measure, measure owner, performance

commentary type

There are four default commentary types: action plan, customer quotes, discussion forum, and owner's commentary. Additional commentary types can be created. You select a commentary type when creating a dashboard.

Related terms
commentary, dashboard

comparative

A reference point that is measured against another reference point to produce meaningful data. A system specialist uses a comparative to create a comparative series. Comparative series are added to measures, either as a base or comparison series. Metrics Management calculates a measure's index value from the base and comparison series. Default comparatives include actual, budget, benchmark, target, and previous year.

Related terms
Actuate Metrics Management (Metrics Management), base series, comparison series, index value, series

comparison series

Used to calculate index values for measures. A base series and a comparison series are used to do the calculation. Examples of comparison series include actual, budget, and target.

Related terms
actual series, base series, comparative, index value, measure, target

completed period

A period of time, defined by a system specialist, for which data is considered complete. Briefing books and views display data for the completed period by default.

Related terms
briefing book, period range, view

Contrast with
beyond completed period, current period, locked period, period range

Configuration Console

A tool used to configure Actuate BIRT iServer System. For example, you can configure logging and e-mail notification. In Actuate BIRT iHub, the advanced view provides more options, such as adding or removing servers in a cluster and taking an Encyclopedia volume offline.

Related terms
Actuate BIRT iHub, Encyclopedia volume

Contrast with
Management Console

consolidation

A way of combining data across periods and locations. Metrics Management supports the following types of consolidations: sum, average, and take last known value.

Related terms
Actuate Metrics Management (Metrics Management), location

Contrast with
consolidation range, location consolidation, period consolidation

consolidation range

The time period that Metrics Management uses in the consolidation of measure data. Year to date and moving year are typical consolidation ranges.

Related terms
Actuate Metrics Management (Metrics Management), consolidation, measure

current period

A period of time, defined by a system specialist, against which a user can enter data.

Contrast with
beyond completed period, completed period, locked period, period range

dashboard

1 In Dashboards, a self-contained application that displays business information as content-rich gadgets on a web page. A dashboard supports creating new gadgets and displaying real-time or static data as interactive charts, cross tabs, Flash visualizations, formatted text, and Reportlets. A dashboard contains one or more gadgets that display information or accept user input to change the content of a linked gadget. Dashboards supports the creation and use of dashboards on a BIRT iHub System, as shown in Figure 5-2. Actuate JavaScript API (JSAPI) supports the presentation and linking of Actuate gadgets on a dashboard.

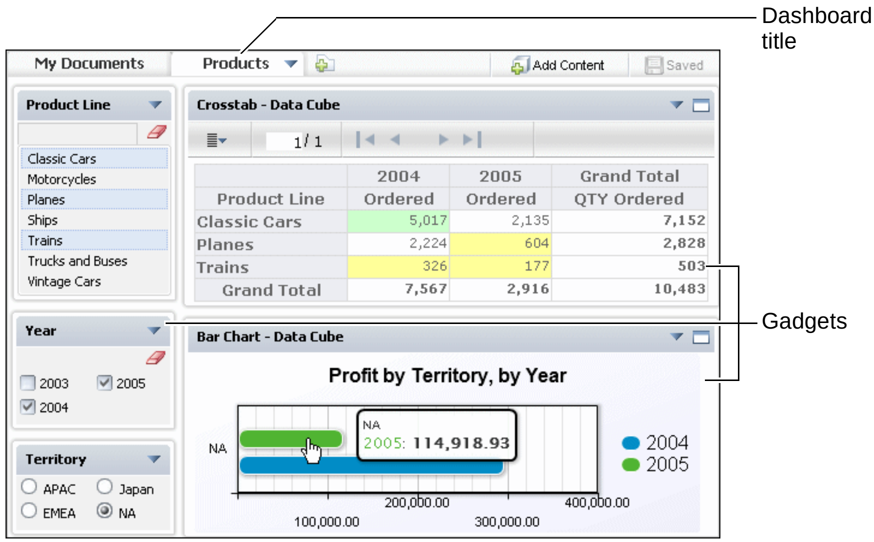


Figure 5-2 A dashboard appearing in Dashboards

2 In Metrics Management, an information pane that shows detailed information about a specific measure or location in a view, briefing book, or map. A dashboard can contain data charts, index charts, data tables, and commentary about measure performance.

Related terms
Dashboards, briefing book, commentary, data chart, index chart, location, map, measure, Reportlet, view

Dashboards

A tool that supports building BIRT dashboards and mashups, and viewing and graphically analyzing data in BIRT dashboards, as shown in Figure 5-3. This tool is an additional license option on an BIRT iHub System. Using BIRT content in a dashboard additionally requires Actuate BIRT option.

Related terms
dashboard, data, mashup

Contrast with
Metrics Management

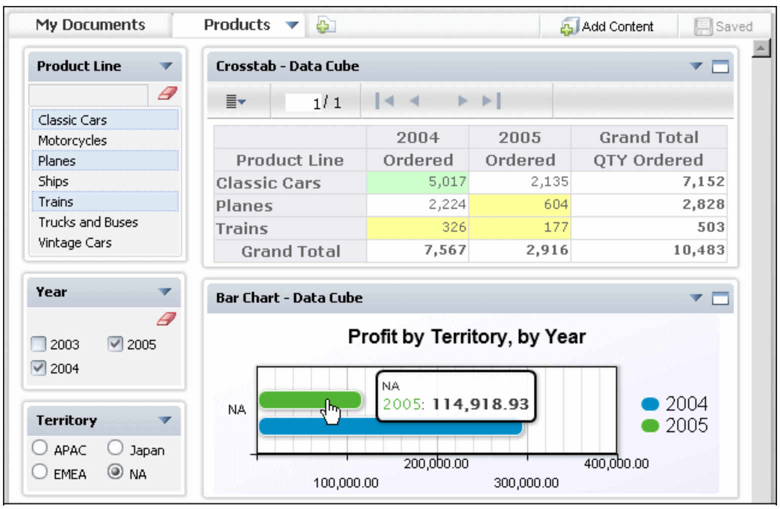


Figure 5-3 Displaying an analytic dashboard using Dashboards

data Information stored in databases, flat files, or other data sources.

Related term
data source

data chart A type of chart that shows data for a given measure. Data charts are found in dashboards and can contain consolidated or unconsolidated data.

Related terms
dashboard, measure

Contrast with
index chart

data connection definition (.dcd) file

A file created using BIRT Information Designer that contains connection properties and security settings for a data source.

Related term

data source

data export

A process that transfers information from a Metrics Management database to an external location. Data can be exported to XML, as a comma-separated values (.csv) file, or to another database using an ODBC connection.

Related terms

database, link, Metrics Management database, Metrics Management system specialist

data import

A process that transfers information from an external source to a Metrics Management database. In Metrics Management, data can be imported from XML, a comma-separated values (.csv) file, and from another database or application using an ODBC connection.

Related terms

Actuate Metrics Management (Metrics Management), database, Metrics Management database

data measure

A measure type that contains data. Measure data can be imported or manually entered into Metrics Management. Data measures are always at the lowest level of a view structure, and their data is aggregated at higher levels, such as a formula measure or a group measure.

Related terms

Actuate Metrics Management (Metrics Management), data import, direct data entry, formula measure, group measure, measure, submeasure, view

data source

1. A relational database or other data repository. For example, an Extensible Markup Language (XML) file, a flat file, an information object, or a Java application can be a data source. A report can include any of these types of data. This data source provides data rows to a report or a gadget on a dashboard through a data source element.
2. A design construct that retrieves data rows from a relational database or other data repository.

Related terms

database, information object, report

database An integrated collection of logically related records that provides data for information application platforms, such as BIRT. The database model most commonly used is the relational model. Other typical models are entity-relationship, hierarchical, network, object, and object-relational.

Contrast with
Metrics Management database

DataMart A specialized version of a data warehouse. DataMarts contain a snapshot of Metrics Management data for export to a Microsoft SQL Server or Oracle relational database format for external reporting and analysis purposes.

Related terms
Actuate Metrics Management (Metrics Management), data export, database

direct data entry

The ability to enter actual or comparative data into Metrics Management using the Data Entry tab in the main window or in a dashboard.

Related terms
Actuate Metrics Management (Metrics Management), comparative, dashboard

Contrast with
actual series, comparison series

display range

The time period for which Metrics Management displays data and information.

Related terms
Actuate Metrics Management (Metrics Management), view

DMAIC A Six Sigma performance management methodology. DMAIC is an acronym for Define, Measure, Analyze, Improve, and Control.

Related terms
performance management, Six Sigma

drill down The ability to choose a measure or location box in a view or section to reveal the submeasures and sublocations below it in the hierarchy.

Related terms
section, sublocation, submeasure, view

effective security

Effective security represents the actions that a user can perform on a specific object after considering the user's group membership, object security, related action, publisher hierarchy, and user privilege settings.

Related terms
object-level security, publisher, user privilege

e-mail link A link in Metrics Management that launches a user's default e-mail application and creates an e-mail to the address specified in the link.

Related terms
Actuate Metrics Management (Metrics Management), link

Contrast with
information link

Encyclopedia volume

A BIRT iHub System repository for managing data and metadata. Encyclopedia volume data includes objects such as designs, documents, and information objects, stored as files in partitions. Metadata consists of information about Encyclopedia volume channels, data objects, groups, roles, users, and other configuration elements, stored in a third-party relational database management system (RDBMS) such as PostgreSQL or Oracle.

Related terms
Actuate BIRT iHub, report, user privilege

Everyone A group of users in Metrics Management that contains all users in the database. A user cannot modify the membership list for this group.

Related terms
Actuate Metrics Management (Metrics Management), database, group

Contrast with
user privilege

filter

1 In Metrics Management, a set of criteria by which measures are collected to create a section.

2 In Dashboards, a mechanism that enables a user to reduce the number of items in a list.

Related terms
measure, section

formula measure

A type of measure that applies a mathematical formula to data measures to calculate a value. A formula measure must be a parent measure.

Related terms
measure, parent measure

Contrast with
data measure, group measure, submeasure

group

1 In Metrics Management, a collection of users for which security can be defined on objects. Most objects have delete, edit, and view security actions.

2 In Dashboards, a set of data rows organized by one or more common values. For example, in a sales report, a group consists of all the orders placed by a single customer.

Related terms
object, object-level security

Contrast with
Everyone, user privilege

group measure

A type of measure that consists of a weighted average of the values of its submeasures. A group measure must be a parent measure.

Related terms
measure, parent measure, submeasure

Contrast with
data measure, formula measure

iHub

See Actuate BIRT iHub.

impersonation

The ability to allow one user to impersonate another. This functionality is primarily used by a system specialist. Impersonation enables the system specialist to test the privileges and security that are defined for a user.

Related terms
Metrics Management system specialist, user privilege

index chart

A type of chart that shows index values for a given measure in a specific period of time.

Related terms
index value, measure

Contrast with
data chart

index mapping

Functionality that allows users to map the default index range values to customized index values. For example, measure staff turnover using a bipolar index mapping, which maps both high and low index values to Poor. Here a high index value can indicate that the organization has trouble retaining staff, and a low value may indicate that the organization cannot attract new employees.

Related terms
index range, index value

index range

A feature that assigns a color and a label to range of index values that describe performance. For example, the color red and the label Poor can describe the range of index values between 0 and 95%.

Related term
performance

Contrast with
index value

index value

A percentage between 0% and 200% that reflects the performance of a measure. Metrics Management calculates this figure using a base series and a comparison series. An index value of 100% or greater indicates that the measure is performing well, regardless of the polarity of the measure.

Related terms
Actuate Metrics Management (Metrics Management), base series, measure, polarity

Contrast with
comparative, comparison series

Information Console

An Actuate BIRT iHub component that supports running and viewing reports stored in an Encyclopedia volume.

Related terms
Actuate BIRT iHub, Encyclopedia volume

information link

A link from Metrics Management to a specific document, URL, or other source of information to which a user has shared access, such as a company web site. There are three types of information links: database information links, location information links, and measure information links.

Related terms
Actuate Metrics Management (Metrics Management), database, link, location, measure

Contrast with
e-mail link

information object

A named SQL (Structured Query Language) query that simplifies access to one or more heterogeneous data sources. An information object retrieves data using database tables and views, stored procedures, and ODA data source queries as well as other information objects. A data modeler writes the query in Actuate SQL. The integration service generates a native query for each data source and retrieves the data. A report developer or business user who uses the information object as a data source in BIRT Designer Professional or Report Studio does not require detailed knowledge of the underlying data sources.

Related terms
Actuate SQL, data source, database, query, SQL (Structured Query Language), view

Contrast with
object

initiative A task belonging to a measure and location pair that typically addresses a problem with a measure's performance, or defines goals related to the organization's performance management strategy.

Related term
location, measure, performance, performance management

Contrast with
subinitiative

link A feature that enables a user to access information outside of Metrics Management, such as documents or web sites.

Related terms
Actuate Metrics Management (Metrics Management), information link, e-mail link

location A geographic or operational unit within an organization that supports the application of hierarchical measures.

Related term
measure

location consolidation

The mathematical method that Metrics Management uses to combine data across locations. Metrics Management supports sum and average consolidations across locations.

Related terms
Actuate Metrics Management (Metrics Management), consolidation, location

Contrast with
consolidation range

location hierarchy

The relationship between locations in Metrics Management. For example, an organization might have several offices in different geographical locations and several divisions within these offices. The location structure would have the separate divisions at the bottom of the structure, the different geographical locations at the level above, and then the Total organization location at the top.

Related terms
Actuate Metrics Management (Metrics Management), location

location owner

An individual who is accountable for performance of measures for a specific location.

Related terms
location, measure, performance

locked period

A period, defined by a system specialist, against which users cannot enter data. Typically, the locked period is one that was previously completed.

Related term
period range

Contrast with
beyond completed period, completed period, current period

Management Console

A set of web pages that provide volume management functions, such as creating channels, roles, security, and users for Encyclopedia volumes.

Related term
Encyclopedia volume

Contrast with
Configuration Console

map

An interactive, visual representation of performance information. Examples of types of maps include cause-and-effect, geographical, process, and strategy. A map can contain links to other objects, such as briefing books. A user also can drill down through a map to the underlying data.

Related terms
briefing book, drill down, link, measure, object, performance

mashup

A web application that combines data and functionality from multiple sources into a single presentation. For example, the Google Maps® mashup combines maps and directions to assist a user in locating and traveling to a destination.

Related term
data

measure

A performance component that collects quantifiable data about a function or process. In Metrics Management, there are three types of measures: data, formula, and group.

Related terms
Actuate Metrics Management (Metrics Management), data measure, formula measure, group measure, performance

measure detail export

A detailed summary of the characteristics and attributes of all measures in a Metrics Management database that is exported from Metrics Management to an XLS file. The measure detail export can be used to perform a quality assessment on a database.

Related terms
Actuate Metrics Management (Metrics Management), database, measure, Metrics Management database

measure owner

Each measure in Metrics Management requires an owner. The owner needs to be an individual or group who is directly responsible for the results that the measure tracks. A measure owner also ensures that commentary is entered to explain measure performance.

Related terms
Actuate Metrics Management (Metrics Management), commentary, group, measure, performance

Contrast with
object owner

measure hierarchy

The relationship between measures in Metrics Management. Data measures are at the bottom of the hierarchy, with formula and group measures above them. For example, the Customer Complaints and Customer Satisfaction data measures determine the value of the Customer Service measure, which is above them in the measure hierarchy.

Related terms
Actuate Metrics Management (Metrics Management), data measure, formula measure, group measure, measure

Contrast with
location hierarchy

Metrics Management

A web application used to create and display performance management information a dashboard. For example, a user can create a personalized dashboard containing performance books, maps, or views using Metrics Management.

Related terms
Actuate Metrics Management (Metrics Management), Balanced Metrics Management, data, performance, performance management, Six Sigma

Metrics Management database

A structured collection of records and data that is stored on a server. Metrics Management accesses these records to answer queries and to save objects.

Related terms
Actuate Metrics Management (Metrics Management), query, object

Metrics Management object

See object.

Metrics Management system specialist

The individual responsible for setting up and maintaining the Metrics Management database. This person has unlimited access to the database and can limit what other users see by changing security and privilege settings.

Related terms
object-level security, Metrics Management database, user privilege

Contrast with
location owner, measure owner, publisher

named path

A shortcut to an application, file, or folder on a network. Using named paths can help save time when creating alerts and links or when importing and exporting data. A system specialist creates and maintains named paths in the Metrics Management database configuration.

Related terms
link, Metrics Management database, Metrics Management system specialist

note

Additional information about a measure that appears on the Info tab in a dashboard. A note can be defined for a measure in the measure's setup form

Related terms
dashboard, measure

notification

1. A message sent by e-mail or listed on the Channels page in Information Console or Management Console.
2. A message from Actuate BIRT iHub regarding the status of a scheduled report or query. A requested report is available for viewing if the report or query has been successfully run.

Related terms
Actuate BIRT iHub, Management Console, query, report

object

An item that has a defined set of properties. For example, briefing books, filters, locations, maps, and users are all objects.

Related terms
briefing book, filter, location, map

Contrast with
information object, object owner, object-level security

object-level security

A set of security permissions defined at the object level. A system specialist or object owner defines object-level security. Acting on an object requires both the appropriate privileges and security settings.

Related terms
object, object owner, Metrics Management system specialist, user privilege

object owner

The user assigned as the owner of an object. By default, the object owner is the user or group who created the object. The object has security settings specific to the object owner.

Related terms
group, object

Contrast with
object-level security

object type

The structure of an object that constrains its characteristics, such as properties and permitted operations. For example, location is an object type, and UK and South America are specific location objects.

Related terms
location, object

Contrast with
object-level security, object owner

order of calculation

The mathematical order of operation used to calculate performance across measures, locations, and periods.

Related terms
measure, location, performance

Contrast with
period consolidation

owner See object owner.

parent measure

A measure that has submeasures. A formula or group measure can be a parent measure.

Related terms
formula measure, group measure, submeasure

Contrast with
data measure

partition A disk location storing Encyclopedia volume data. The logical name for a partition points to the path or physical location on disk. By default, the logical name for the default partition points to the following path on Windows:

```
\Actuate\iHub\data\encyc\
```

Related term
Encyclopedia volume

performance

Progress in strategies, goals, and other activities that may contribute to achieving organizational objectives.

Contrast with
commentary, performance calculation, performance management

performance calculation

A calculation that combines data to show performance. Typically, this calculation is the aggregate of measure data over a period of time.

Related terms
measure, performance

performance commentary

See commentary.

performance management

The sum of methodologies, metrics, processes, and technology used to carry out the goals of a company, such as clear communication of strategy and goals, fostering accountability, meeting all data access and information delivery requirements, and involving as many people as possible in a closed-loop performance management process.

Related term
performance

performance map

See map.

performance range

A set of five index ranges. The five index ranges are percentage values that total 200%. Each index range has a color and label that indicate a measure's performance.

Related terms
index range, measure, performance

period consolidation

The mathematical method used to combine data across time periods, such as sum, average, and take last known value.

period range

A defined period of time for which data is consolidated and displayed in Metrics Management and reports.

Related terms
Actuate Metrics Management (Metrics Management), report

polarity A property of a measure that indicates how a high or low data value is interpreted in terms of performance. For example, High values are good is a polarity that is suitable for a sales measure. On the contrary, High values are bad is suitable for a measure of customer complaints.

Related terms
measure, performance

Contrast with
index value

preferred location

The default location for a user when opening a view or briefing book.

Related terms
briefing book, location, view

privilege See user privilege.

published An attribute assigned to an object by a system specialist or object owner. If an object is published, it can be viewed by the users who have viewing rights for the object. If an object is not published, it can only be viewed by the object's publisher and a system specialist.

Related terms
object, object owner, publisher, Metrics Management system specialist

publisher The user who makes an object available to other users. The object's owner is the object's publisher, by default, but the owner can assign another user as the publisher.

Related terms
object, object owner

Related terms
published

query A statement that specifies which data rows to retrieve from a data source. For example, a query that retrieves data from a database typically is a SQL SELECT statement.

Related terms
data source, database, SQL (Structured Query Language)

report A category of documents that presents formatted and structured content using data from the measures and locations in a view. Typically, a report uses a filter or section to specify how to select measures from an existing or customized view.

Related terms
category, filter, location, measure, section, view

Contrast with
Actuate Metrics Management (Metrics Management), briefing book, data source, database

Reportlet In Actuate BIRT technology, a portion of a report that can be embedded in a web page.

Related terms
report

restriction A security setting which allows a user to only enter measure commentary or data for specific commentary types, comparatives, or locations.

Related terms
object-level security, user privilege

section A Metrics Management object that contains a selected list of measures and locations, dashboards, and links to documents and maps. A briefing book can contain multiple sections.

Related terms
Metrics Management, briefing book, dashboard, link, location, map, measure, object, report, section

security role

A name for a set of privilege levels. Assigning a security role to a user defines the user's privileges.

Related term
privilege

series

1. In Metrics Management, a set of data that is compared against another set of data to produce performance information. Specifically, Metrics Management compares base series data against comparison series data to calculate the index for each measure.
2. In Dashboards, a sequence of related values. In a chart, for example, a series is a set of related points. Figure 5-4 shows a bar chart that displays a series of quarterly sales revenue figures over four years.

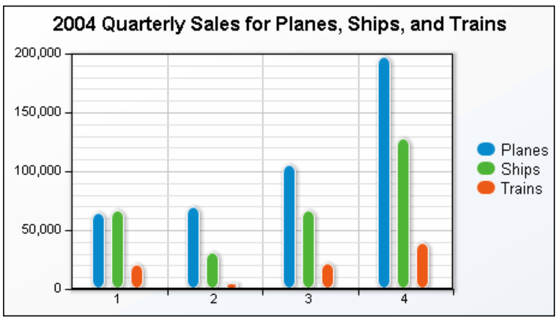


Figure 5-4 Series in a chart

Related terms
Actuate Metrics Management (Metrics Management), base series, comparison series, index value, measure, performance

Contrast with
category

Share An organized collection of links, online resources, and other resources that are accessed from a view or briefing book. The links that appear in Share are context sensitive, depending on the selected measure. They are organized by measure, location, category, and application.

Related terms
briefing book, category, link, location, measure, view

Six Sigma A methodology for minimizing mistakes and maximizing organizational performance. The methodology works on two fundamental levels: managerial and technical.

Contrast with
Balanced Metrics Management

SQL (Structured Query Language)

A language used to access and process data in a relational database.

Related term
database

subinitiative

Any initiative with a parent initiative. A subinitiative can be a data initiative or group initiative. Date, budget, and rating values of subinitiatives are consolidated or otherwise processed to provide performance indicator values to initiatives above.

Related term
initiative, measure, performance

sublocation

A location that is nested within another location. For example, if Metrics Management is set up to monitor performance for a region, the sublocations could be the district offices within the region.

Related terms
Actuate Metrics Management (Metrics Management), location, performance

Contrast with
submeasure

submeasure

Any measure with a parent measure. A submeasure can be a data measure, formula measure, or group measure. The indexes of these measures are consolidated or otherwise processed to provide index values to the measure above.

Related terms
data measure, formula measure, group measure, index value, measure, parent measure

Contrast with
sublocation

target A comparison series of data that often represents an aspiration or goal.

Related terms
comparison series

Contrast with
actual series, base series

translators

Associate labels and names used to effectively import and export information external to Metrics Management while using the Metrics Management name for the item.

Related terms
Actuate Metrics Management (Metrics Management), data export, data import

two-line style

An option in sections that allows longer measure names to appear on two lines instead of one.

Related terms
measure, section

unit type A descriptive label for data in Metrics Management. Examples of unit types include number, percent, days, and dollars. A unit type determines how data appears, for example, the number of decimal places that a numerical value displays.

Related term
Actuate Metrics Management (Metrics Management)

user group

See group.

user privilege

A security permission, granted by a system specialist, that defines the actions that a user can perform on a specific object. Acting on an object requires both the appropriate privileges and object-level security settings.

Related terms
object, object-level security, Metrics Management system specialist

user template

A standard user setup page that has specific settings defined, such as user privileges. Metrics Management comes with six default user templates: Administrator, Location administrator, Regular user or measure owner, Restricted administrator, Restricted location administrator, and View only user.

Related terms
Actuate Metrics Management (Metrics Management), measure owner, Metrics Management system specialist, user privilege, view only user

view A hierarchical structure that displays the relationships between strategic objectives, locations, and measure performance in an organization.

Related terms
location, measure, performance

view only user

A Metrics Management user for which specific user privileges are defined. These users can view objects, but they cannot create, edit, or delete objects.

Related terms
Actuate Metrics Management (Metrics Management), object, user privilege

Contrast with
object-level security, user template

volume See Encyclopedia volume.

weight The relative importance of submeasures in a group measure. The sum of the weights for all the submeasures in a group measure must be 100.

Related terms
group measure, submeasure

Index

C

D

E

F

G

H

I

J

L

M

N

O

P

Q

R

S

T

U