



Welcome to Hyperion System 9 Performance Scorecard, Release 9.2. This document describes the new or modified features in this release.

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HYPERION SYSTEM 9

Hyperion® System™ 9 is a comprehensive Business Performance Management system. It integrates financial applications with a business intelligence platform to provide a modular system that adapts to any business need.

The major components of Hyperion System 9 are Hyperion® System™ 9 BI+™, Hyperion® System™ Applications+,™ and Hyperion® System™ 9 Foundation Services™.

HYPERION SYSTEM 9 APPLICATIONS+

Hyperion System 9 Applications+ is a set of packaged applications for planning, consolidation, and scorecarding.

HYPERION SYSTEM 9 BI+

Hyperion System 9 BI+ is a comprehensive business intelligence platform. It provides management reporting and analysis from any data source, including transactional systems, data warehouses, SAP BW, Analytic Services, and Hyperion financial applications.

Hyperion System 9 BI+ offers:

- User interaction with all types of information in one environment - viewing of reports, processing of reports and queries that include parameters, and using dynamic dashboards to view and interact with content
- A richly interactive BI+ user interface, which serves as a single thin client for reporting, analysis, and metrics management
- The broadest set of modular BI functionality in the market, including production reporting, financial reporting, ad hoc query and analysis, and advanced analytics
- Seamless integration and interaction with Microsoft Office
- Flexible and complete content access, which integrates third-party content with Hyperion content in an easy to use interface.
- Capabilities including subscription notifications, favorites, and scheduling options to support a wide range of application uses
- Integration with the full Hyperion System 9 Foundation Services for central provisioning and management of all Hyperion System 9 users

Hyperion System 9 BI+ Module includes:

Essbase Analytics and Enterprise Analytics—Collectively referred to as *Analytic Services*; provides powerful OLAP capabilities for high performance multidimensional reporting, analysis, and modeling

Interactive Reporting—Self-service, ad hoc query and analysis for relational databases that enable users to pivot interactively, and to slice and drill from summary to detailed data

Production Reporting—Visually clear, high volume, enterprise reporting with parameters

Financial Reporting—Highly formatted financial reports with access to Hyperion System 9 Applications+, Hyperion® System™ 9 BI+™ Analytic Services™, and SAP BW

Web Analysis—Interactive, visualization and reporting against Hyperion System 9 BI+ Analytic Services, Hyperion System 9 Applications+, and Hyperion® System™ 9 BI+™ Integration Connector for SAP BW™

Enterprise Metrics—Enterprise-wide metrics management and analysis delivered through personalized, interactive dashboards

Note: Availability of these new features depends on the configuration that has been purchased.

USING PERFORMANCE SCORECARD IN HYPERION SYSTEM 9 BI+ WORKSPACE

The Hyperion® System™ 9 BI+™ Workspace™ (Workspace) provides easy access to multiple Hyperion products in a single location. In Workspace, you can customize your executive dashboard to display the applications and information that you require, to easily move from Performance Scorecard to other Hyperion applications that you have installed:

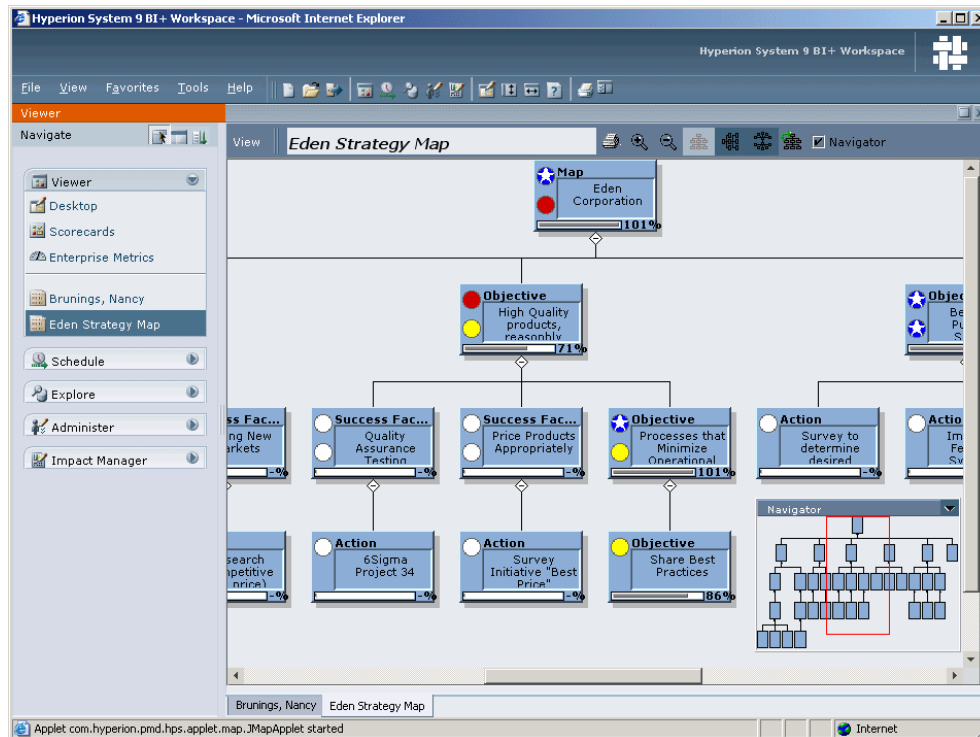
- Hyperion® System™ 9 BI+™ Analytic Services™
- Hyperion® System™ 9 BI+™ Interactive Reporting™
- Hyperion® System™ 9 BI+™ Production Reporting™
- Hyperion® System™ 9 BI+™ Financial Reporting™
- Hyperion® System™ 9 BI+™ Enterprise Metrics™
- Hyperion® System™ 9 BI+™ Web Analysis™

With this release, Performance Scorecard data is available both as a standalone application or through the Workspace.

Through the Workspace Explorer view, select Scorecards from the Viewer to display your Performance Scorecard scorecards and maps, including Strategy, Accountability and Cause and Effect maps. You can also view reports in Performance Scorecard or through extended reporting with Hyperion System 9 BI+ Interactive Reporting, or Hyperion Intelligence 8.3.

With a simple click, drill directly from the Workspace into measures in Performance Scorecard to modify data, create business objects or view additional measure details and initiatives. Changes you make in Performance Scorecard are immediately reflected in Workspace.

Depending on the configuration that you purchased, you can navigate within Workspace to other applications.



From Workspace, you can easily export information, as follows:

- Export data to Microsoft Excel, where you can modify information in the Excel spreadsheet, although you cannot reimport this information back to Performance Scorecard.
- Export report results into a PDF file for printing
- Export a Cause and Effect map as an image file.

To access Performance Scorecard data and maps through Workspace, you need to install and configure both Performance Scorecard and Workspace. Single sign-on must be enabled. With this release, external authentication can be performed in a standalone mode, or through Shared Services. See the *Hyperion System 9 Performance Scorecard Installation Guide* for instructions.

For detailed instructions on installing and using the Hyperion System 9 BI+ Workspace with Performance Scorecard, refer to the Hyperion System 9 BI+ Workspace documentation suite.

HYPERION® SYSTEM™ 9 SHARED SERVICES™ USER MANAGEMENT

Hyperion® System 9 BI+™ Shared Services™ (Shared Services) User Management enables centralized management of user access rights and accessibility to applications created under various projects of different products. The user management process allows the administrator or delegated administrator to associate users and groups to projects and give them specific roles in that application.

User IDs and groups may exist in various authentication systems and also within products in an existing installation. Also, you can create new users and groups and roles at the native level. Every product has product-specific roles defined at the product level.

A project may contain one or more applications. Users or groups can be associated with an application and can be assigned one or more roles per application.

For additional information about user management, see the *Hyperion System 9 Shared Services User Management Guide* available on the Hyperion Download Center.

CAUTION! If you are using Shared Services authentication, ensure you launch Shared Services before launching Performance Scorecard; otherwise, the authentication will fail.

USER PROVISIONING THROUGH SHARED SERVICES

You can provision users and groups for Performance Scorecard using Shared Services. This feature enables you to share existing user information between Hyperion applications, and provision multiple users at one time.

In order to provision users for Performance Scorecard from users registered with Shared Services, select this as an option after installation, when you run the Configuration Utility, as outlined in the *Hyperion System 9 Performance Scorecard Installation Guide*.

The provisioning process requires you to have both the Shared Services server and Performance Scorecard configured and running. External authentication ensures that the applications can communicate seamlessly to provision users easily and accurately.

If users exist in Shared Services and you want to provision them to Performance Scorecard all at once, bulk provisioning is available. Each of the items selected during bulk provisioning is assigned the same Shared Services security role. After saving the provisioned users, you must apply Performance Scorecard security roles individually to each user.

When you have a large number of users to migrate from the Performance Scorecard native user registry to Shared Services, you can perform a one-time bulk migration. After the initial migration, this option is disabled and cannot be used again.

When provisioning Performance Scorecard through Shared Services, user management functions can no longer be performed from Performance Scorecard. You need to access Shared Services for user management, then synchronize the records with Performance Scorecard.

For information about user provisioning in Performance Scorecard, refer to the *Hyperion System 9 Performance Scorecard Administrator's Guide*.

PRODUCT NAME CHANGES

With the launch of Hyperion System 9, most of the product names have been updated. The following table provides a mapping between some of the old and new product names:

Table 1 Mapping of Selected Product Names

Previous Product Name	Hyperion System 9 Product Name	Module Name
Hyperion Performance Scorecard	Hyperion® System™ 9 Performance Scorecard™	Performance Scorecard
Hyperion Essbase	Hyperion® System™ 9 BI+™ Analytic Services™	Analytic Services
Hyperion Essbase Integration Services (EIS)	Hyperion® System™ 9 BI+™ Analytic Integration Services™ (AIS)	Analytic Integration Services
Hyperion Essbase Administration Services (EAS)	Hyperion® System™ 9 BI+™ Analytic Administration Services™ (AAS)	Analytic Administration Services
Hyperion Intelligence	Hyperion® System™ 9 BI+™ Interactive Reporting™	Interactive Reporting
Hyperion Reports	Hyperion® System™ 9 BI+™ Financial Reporting™	Financial Reporting
Hyperion Analyzer	Hyperion® System™ 9 BI+™ Web Analysis™	Web Analysis
Hyperion Metrics Builder	Hyperion® System™ 9 BI+™ Enterprise Metrics™	Enterprise Metrics
Hyperion Financial Management	Hyperion® System™ 9 Financial Management™	Financial Management
Hyperion Planning	Hyperion® System™ 9 Planning™	Planning
Hyperion Strategic Finance	Hyperion® System™ 9 Strategic Finance	Strategic Financial
Hyperion Hub	Hyperion® System™ 9 Shared Services™ Hyperion® System™ 9 Shared Services™ User Management Console (for user provisioning)	Shared Services
Hyperion Application Link	Hyperion® System™ 9 Application Link	Application Link

Note: The product names for Hyperion Business Modeling, Hyperion Enterprise and Hyperion Pillar are unchanged with this release.

INSTALLATION AND CONFIGURATION

A common installation now enables you to install multiple Hyperion products, and configure products at the same time or individually.

The installation of certain common components is now required, as follows:

- [“Hyperion License Server” on page 7](#)
- [“Hyperion Configuration Utility” on page 7,](#)
- Hyperion System 9 Shared Services, if required

To successfully install Performance Scorecard, you must follow a specific sequence of steps. The steps are included in the *Hyperion System 9 Installation Start Here* and in the *Hyperion System 9 Performance Scorecard Installation Guide*. Please read these documents before you install this release of Performance Scorecard.

HYPERION LICENSE SERVER

Hyperion now uses a common license server to provide you with a more uniform and consistent method of governing the use of your Hyperion products. Hyperion License Server uses a license file specific to your site to assist you in tracking and monitoring the following information:

- The products that you have purchased
- Your feature options
- The number of users that can access each product
- The expiration dates of your license and maintenance agreements

Hyperion License Server also uses a third-party component to give you one, centrally managed administrative tool for handling license issues. This tool provides the following capabilities:

- Ensuring license compliance
- Monitoring use of licenses
- Generating reports of license events

Because Hyperion License Server is a process, not a physical server, it need not be installed on a dedicated computer. Hyperion License Server can be installed on a shared computer, so you can install it in an environment that enables the most efficient use of resources.

For more information about Hyperion License Server, see the *Hyperion System 9 Shared Services Installation Guide* available on the Hyperion Download Center.

HYPERION CONFIGURATION UTILITY

This release of Performance Scorecard introduces a new common tool, the Configuration Utility, which replaces the previous Configuration tool that was provided with Performance Scorecard. The utility guides you through a series of screens to complete the following configuration tasks:

- Product activation
- Product registration with Hyperion System 9 Shared Services
- Configuration of relational databases as product data sources
- Automatic deployment of products to application servers

If your product has unique configuration requirements, the Configuration Utility displays additional options.

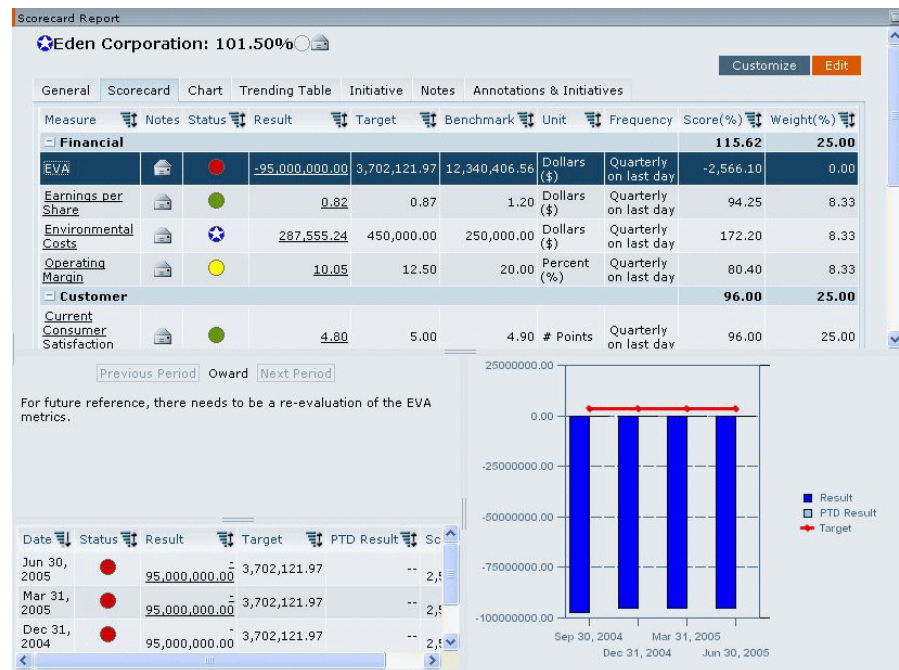
You can launch the Configuration Utility from the final screen of each product installer or from the start menu (Start -> Programs -> Hyperion System 9 Foundation -> Configuration Utility). The Configuration Utility also enables you to reconfigure Hyperion products. The reconfiguration process is similar to the initial process.

For details, see the *Hyperion System 9 Performance Scorecard Installation Guide*.

EXECUTIVE VIEW

The Executive View provides a split screen view of a scorecard, and its key associated scorecard data, including annotations, Trend Tables, Charts, and initiatives. Also called a strategy meeting or meeting view by some users, the Executive View is available to all users as a customizable feature,

You can customize the view to display the information in the format that works best for you. The Application Designer also has the option to set the layout for all users by selecting Set System Defaults on the Customize window.



Through the Executive View, you can select the following information for display:

- Annotations pane to display any comments for the associated reporting period.
- Trend Table pane to show historic measure and scorecard data for the current reporting period and back for one year. The Trend Table can be customized to show next year end's value.
- Trend Chart pane to show the trending chart from the current reporting date back one year. The Trend Chart can be customized to show next year end's value.
- Initiatives pane to display the set of initiatives, if available.

The layout of the Executive View can be customized to present the information you want to view in a choice of seven layouts.

For additional information and instructions on customizing the Executive View, refer to Chapter 2, "Getting Started" in the *Hyperion System 9 Performance Scorecard User's Guide*.

USING EXTERNAL DATA SOURCES

With this release, you can use external data sources to import measure data to populate a Performance Scorecard application. The following types of external data sources are supported in this release:

- Hyperion® System™ 9 BI+™ Analytic Services™ (formerly Hyperion Essbase)
- Hyperion® System™ 9 BI+™ Enterprise Metrics™ (formerly Hyperion Metrics Builder)

Using an easy-to-follow task flow in the Administrator's workspace, the outlines and dimensional configuration are mapped, and data selection is completed. Time hierarchies in the external data sources are aligned with the Performance Scorecard calendar and period configuration.

The screenshot shows the 'Data Source General' configuration window. It has a tabbed interface with the following tabs: General Attributes, Measure Dimension, Values Dimension, Time Mapping, Other Dimensions, and Pinned Dimension. The 'General Attributes' tab is selected. Inside this tab, there are several input fields: 'Name', 'Description', 'Server', 'Port' (with the value '1423' entered), 'Application', 'Analytic Services Database', 'User Name', 'Password', and 'Confirm Password'. At the bottom right of the window, there are four buttons: 'Next', 'Test Connection', 'Save', and 'Cancel'.

For detailed instructions on importing data into Performance Scorecard from external data sources, refer to Chapter 4, “Using External Data Sources” in the *Hyperion System 9 Performance Scorecard Administrator's Guide*.

EXTENDED CUSTOMIZED REPORTING

With this release, you can view Performance Scorecard data through Hyperion® System™ 9 BI+™ Interactive Reporting Studio™ (Interactive Reporting). For existing users, Hyperion Intelligence Release 8.3 or earlier is also supported in this release of Performance Scorecard.

Three default reports are provided, as follows:

- Scorecard Report
- Scorecard with Measure Trends
- Strategy Dashboard

The data that is displayed in the reports is obtained from the Star Schema tables that you generate in Performance Scorecard. The reports are presented in a combination of tables that provide both detailed and summary information, and graphical charting of those results. Using these default reports as a template, you can also customize your reports to present the information you require in a format that works for you.

For details on the default reports, and instructions on generating them, refer to Chapter 9, “Extended Reporting” in the *Hyperion System 9 Performance Scorecard Administrator’s Guide*.

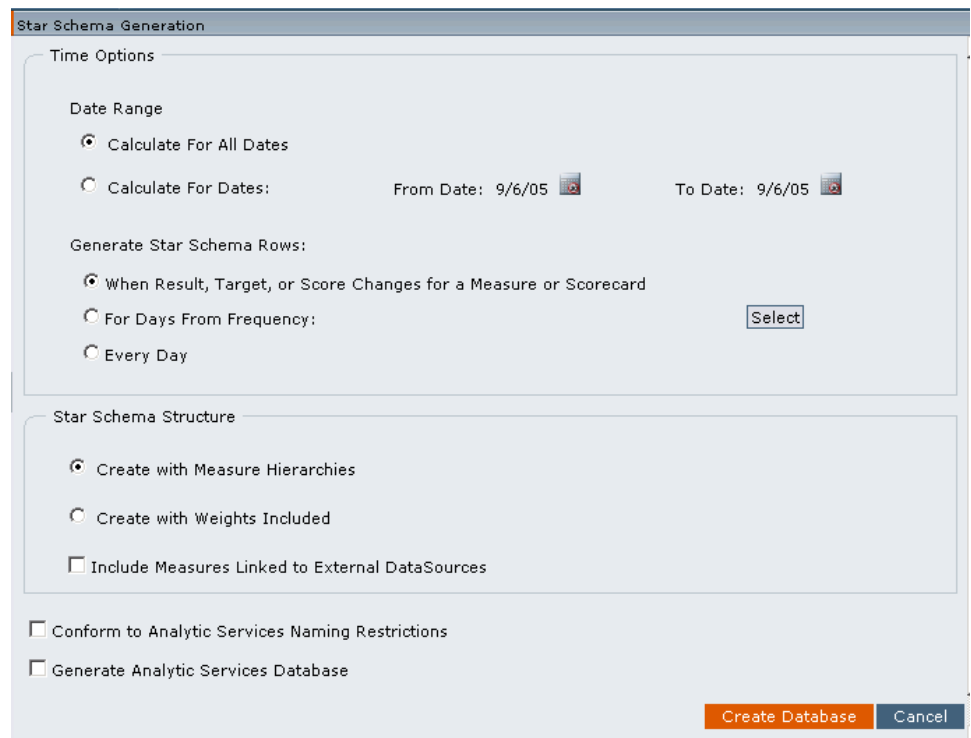
GENERATING ANALYTIC SERVICES DATABASES

You can generate Analytic Services databases using Analytic Services or other Hyperion reporting tools, such as Interactive Reporting and Enterprise Metrics.

Depending on your requirements, you can retrieve generated results using the following options:

- Generate a Star Schema database that provides pre-defined tables which contain a standard set of data from Performance Scorecard and is stored in relational database tables. You need to generate Star Schema tables if you are going to generate reports in Interactive Reporting.
- Generate an Analytic Services multidimensional database that contains all requested Performance Scorecard data and is stored in Analytic Services multidimensional database tables.

From the Performance Scorecard main menu, select **Administration > Star Schema Generation** to access the Star Schema Generation page.



The image shows a screenshot of the "Star Schema Generation" dialog box. It has a title bar "Star Schema Generation". The dialog is divided into two main sections: "Time Options" and "Star Schema Structure".

Time Options:

- Date Range:**
 - ☒ Calculate For All Dates
 - ☐ Calculate For Dates: From Date: 9/6/05 To Date: 9/6/05
- Generate Star Schema Rows:**
 - ☒ When Result, Target, or Score Changes for a Measure or Scorecard
 - ☐ For Days From Frequency: Select
 - ☐ Every Day

Star Schema Structure:

- ☒ Create with Measure Hierarchies
- ☐ Create with Weights Included
- ☐ Include Measures Linked to External DataSources

At the bottom, there are two checkboxes:

- ☐ Conform to Analytic Services Naming Restrictions
- ☐ Generate Analytic Services Database

At the bottom right, there are two buttons: "Create Database" (orange) and "Cancel" (blue).

If you are generating the Star Schema tables, you only need to complete the Star Schema Generation page, then click **Create Database**.

If you want to generate an Analytic Services multidimensional database, complete the same information and select **Generate Analytic Services Database**. The screen expands to show the additional information that is required to generate a complete Analytic Services database.

For detailed instructions on generating Star Schema tables and Analytic Services databases, refer to Chapter 3, “Generating Results with Analytic Services” in the *Hyperion System 9 Performance Scorecard Administrator’s Guide*.

SCHEDULING AUTOMATIC DATABASE GENERATION

If you plan to regenerate Performance Scorecard Star Schema tables or the Analytic Services multidimensional database on a regular basis to keep custom reports up-to-date, you can schedule the database regeneration to run automatically at a convenient time.

A `GenerateCube` file is provided for Windows or UNIX operating systems which enables you to schedule the database generation. You need to customize the file, and then run the script. After modifying the file, you schedule the task. The Star Schema or multidimensional database generation will be run at the scheduled time.

For detailed instructions on automatically generating databases, refer to Chapter 4, “Using External Data Sources” in the *Hyperion System 9 Performance Scorecard Administrator’s Guide*.

ANNOTATIONS AND NOTES

In previous releases, you could define periods of time with which to associate notes and discussion threads. With this release of Performance Scorecard, you can no longer assign a note to a specific reporting period, but this functionality is now available in annotations.

Notes are attached to scorecards, measures, accountability elements and strategy elements. You can reply or delete notes that you created from the Notes tab on the page for the associated elements or measures. If you are the author of a note, you can also modify certain attributes of a note.

Annotations are similar to notes, enabling you to append additional information or instructions to a selected business object for a specified reporting period. Annotations are attached to measures, accountability elements and strategy elements, and can be created only by an authorized annotation creator. Users cannot reply to an annotation.

As an alternative method of viewing multiple annotations and their associated initiatives for a defined category and reporting period, you can use the Annotations and Initiatives tab which combines this information into a single screen format.

For information about working with notes and annotations, refer to the *Hyperion Performance Scorecard User’s Guide*.

WORKING WITH DOMAINS

Domains enable design work to be partitioned across multiple people, departments or divisions across an organization. Several enhancements have been implemented to simplify the creation and management of domains.

To enhance the creation and management of domains, they are now created in a hierarchy, and access levels roll up from children to the top level. A Domain can have either No Parent (at the top of the hierarchy) or one parent. The parent domain must exist before the child domain can be created. In order to take advantage of a bulk domain assignment, the user must have write access to both the objects and the domain that are being created.

Domains are optional, but if they are used, access permissions to each domain must be assigned to the associated users. When access is assigned, the user has access to all business objects associated with the domain, and each business object created by that user is automatically added to the domain.

To simplify the assignment of access, permission may be assigned in one of two ways:

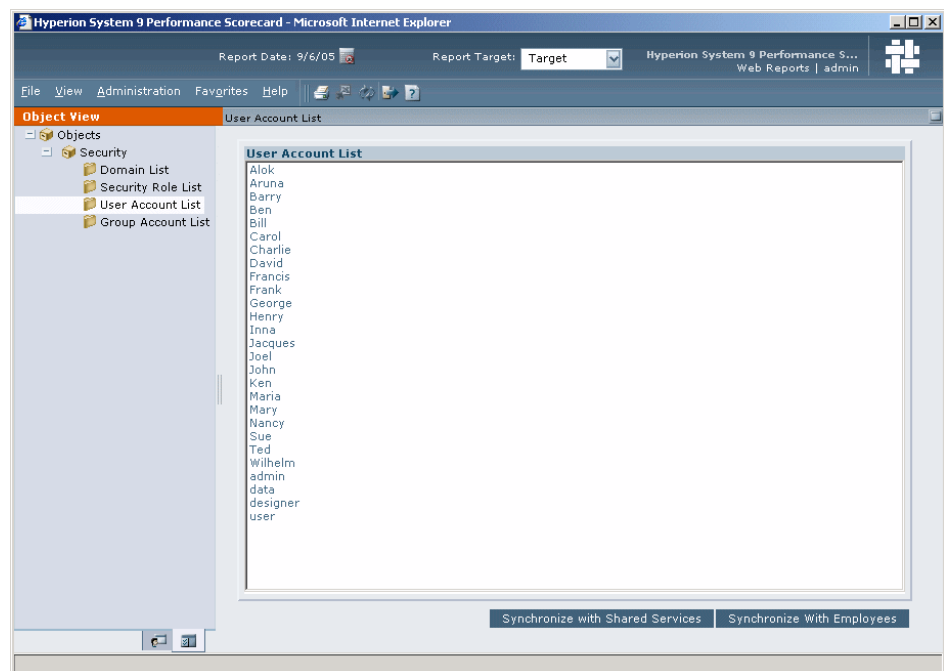
- *Explicit access* permission enables the domain designer to specifically assign Modify access to the model elements that belong to one or more assigned domains.
- *Implicit access* permission is offered by default, and enables the domain designer to be given Modify access to the selected domain and its direct and indirect children.

For more information on working with domains, refer to Chapter 2, “Managing User Accounts and Authorization” in the *Hyperion System 9 Performance Scorecard Administrator’s Guide*.

ACCESSING ADMINISTRATION TASKS

Previously, user management tasks were accessed from the Administration menu in the application. Now user management is available through the admin role only. The following lists are displayed on the Object Browser tab under Security:

- **Domain List** enables you to add, edit or delete domains to manage business objects, such as branch offices, geographic locations or specific departments to streamline and manage data in logical groups.
- **Security Role List** is used to add, edit or delete custom security roles to establish user and group access permissions to measures, scorecards and Web pages.
- **User Account List** enables you to add, edit or delete users and to associate those users with an employee, a domain (if required) and a security role.
- **Group Account List** enables you to add, edit or delete groups, and to associate those users and other groups who are part of the group.



For detailed instructions on creating and managing domains, security roles, and users and groups, refer to Chapter 2, “Managing User Accounts and Authorization” in the *Hyperion System 9 Performance Scorecard Administrator’s Guide*.

NEW REPORTS

Three new reports are available in this release of Performance Scorecard.

USER SESSION REPORT

The User Session Report enables the Administrator to view details about active and historical user sessions. The Administrator can query the report to display information for a particular user ID and date range, and can limit the report to currently active sessions only.

For information on the contents of the reports, refer to Chapter 10, “Managing and Monitoring Application Business Objects” in the *Hyperion System 9 Performance Scorecard Administrator’s Guide*.

ALERter PROCESS REPORT

The Alerter Process Report monitors the alerts that have been triggered. If Alerter is enabled and configured for your application, this report is available from the Performance Scorecard Administration menu.

Use the Alerter Process Report to monitor alert activity and the response of each user to the alerts that they receive. Only the Administrator can access the Alerter Process Report.

For information on the contents of the reports, refer to Chapter 8, “Managing Alerts Using the Alerter” in the *Hyperion System 9 Performance Scorecard Administrator’s Guide*.

FORMULA ERRORS REPORT

Existing Administrative users who have upgraded from a previous release can now validate the formulas of all measures and performance indicator ranges in an application using the Formula Error Report.

The report provides the following data that you can use to resolve errors:

- The name of the measure or performance indicator that has an error in its formulas
- The kind of formula that contains the error, such as a score
- The section of the formula that is invalid
- An explanation of why the section is invalid

For detailed information on using the Formula Errors Report, refer to the *Hyperion System 9 Performance Application Designer’s Guide*.

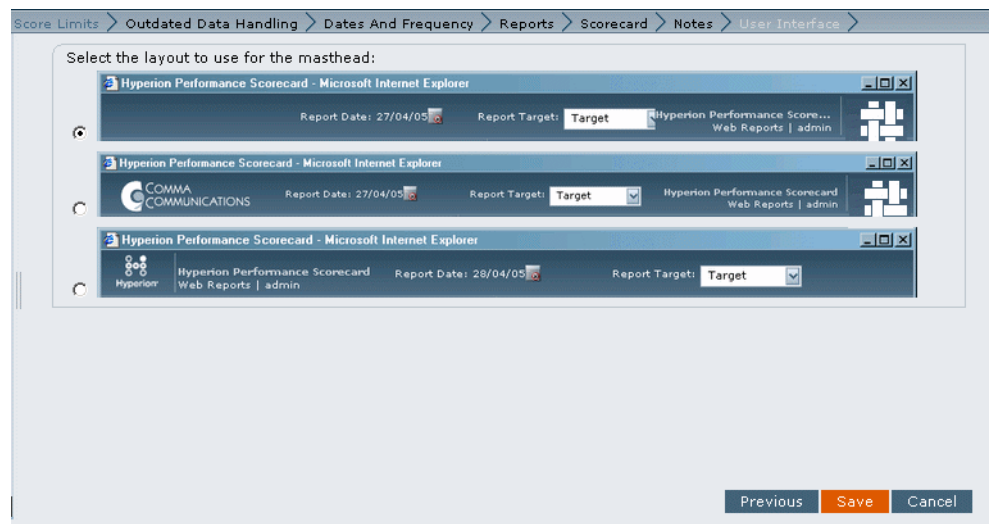
USABILITY ENHANCEMENTS

A large number of usability enhancements have been implemented with this release, to make using and managing the application much easier, including the following enhancements:

- “Customizing the Masthead” on page 14
- “Setting your Personal Display Preferences” on page 15
- “Setting Favorites” on page 15
- “Displaying Descendants and Constituent Scorecards” on page 15
- “Customizing Scorecards and Reports” on page 16
- “Setting a Start Date for Initiatives” on page 17
- “Launching Reports in a New Window” on page 17
- “Repositioning the View Pane Tabs” on page 17
- “Setting Default performance indicators” on page 17
- “Modifying UI Themes” on page 18
- “Customizing the Application using Client.css” on page 19
- “Measures and Scorecards Selection Box” on page 19
- “Formula Editor Enhancements” on page 20

CUSTOMIZING THE MASTHEAD

For the Designer only, a new tab is available under Application Preferences that enables you to customize the masthead for all users.



There are three options available, and you can modify the masthead to display your corporate logo.

For more information on customizing the application, refer to the *Hyperion System 9 Performance Scorecard Application Designer's Guide*.

SETTING YOUR PERSONAL DISPLAY PREFERENCES

You can customize the application to reflect your personal preferences for managing your personal workspace, including:

- The contents of your Home Page
- Display of your User Interface, to set sticky links, browser control, UI theme and date formats
- Password Change

The Application Designer can now set default system settings for all users.

For instructions on setting your display preferences, refer to the *Hyperion System 9 Performance Scorecard User's Guide*.

SETTING FAVORITES

The Favorites setting from the main menu offers the choice to bookmark specific pages that you reference frequently within Performance Scorecard. For example, if you often access a specific report page, you can set that page as one of your favorites. Instead of navigating to the page, select it from the Favorites drop-down list. You can also enter the URL for a Web page from outside of Performance Scorecard, such as a corporate Web page or browser.

The Favorites list can be edited to sequence entries in the best way for your requirements. You can also edit the actual Name and URL of the selected Web page, or delete an item from the list.

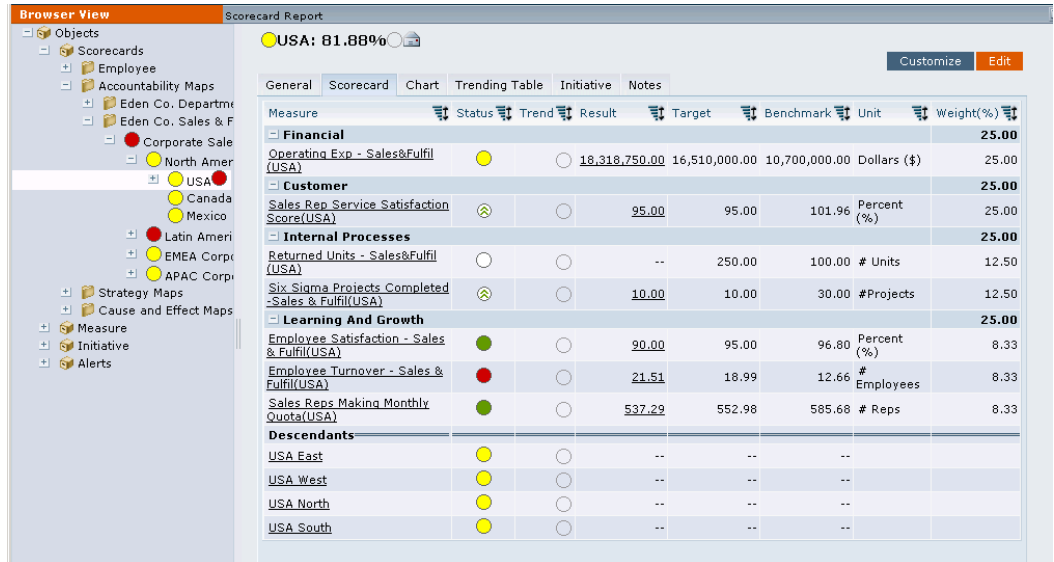
For detailed instructions on setting favorites, refer to the *Hyperion System 9 Performance Scorecard Web User's Guide*.

DISPLAYING DESCENDANTS AND CONSTITUENT SCORECARDS

You can now customize the Scorecard Report to display related scorecards and descendants of the selected scorecard.

On the selected scorecard, click **Customize** to display the Scorecard Report Customization window, where you can select one or both of the following display options:

- Select **Automatically add Accountability/Strategy children to scorecard** to display any scorecards for the children of the selected scorecard at the bottom of the window, even if that child is not actually part of the scorecard. These scorecards are listed under the heading, Descendants.
- Select **Display child scorecard constituents instead of child scorecards themselves** to display the measures from any child scorecards of the selected scorecard, rather than the child scorecard. The measures are listed at the bottom of the window, under the heading, Descendants.



For detailed instructions, refer to Chapter 2, “Getting Started” in the *Hyperion System 9 Performance Scorecard User’s Guide*.

CUSTOMIZING SCORECARDS AND REPORTS

When you click the Customize button on scorecards and reports, you have additional option available to set the display to suit your needs. In some instances, you can select the colors that you want to use for specific elements.

Scorecard Chart Customization

☐ Set System Defaults

☒ Display Legends

☒ Short Perspective Names

☐ Scale y-axis automatically

☐ Layout multiple charts in rows

☒ Layout multiple charts in columns

Chart Types

☒ Dial

☒ Perspective

☒ Trend (line)

☐ Trend (bar)

☐ Scorecard Radar

Perspective Chart Settings

☒ Show Scores

☒ Show Weighted Scores

Radar Chart Settings

☒ Result

☒ Target

☒ Normalize results to 100

Comparators

☐ Target

☐ Benchmark

Colours

Result	Financial
Target	Customer
Score	Internal Processes
	Learning And Growth

Preview Save Cancel

Make your selections, then click Save to apply the changes for the selected scorecard or report.

For additional information, refer to the *Hyperion System 9 Performance Scorecard User’s Guide*.

SETTING A START DATE FOR INITIATIVES

When you create an initiative, a Start Date is now required.

Refer to Chapter 4, “Using Performance Scorecard Reports” in the *Hyperion System 9 Performance Scorecard User’s Guide* for more information.

LAUNCHING REPORTS IN A NEW WINDOW

The Application Designer can select an Application Preference to launch reports in a new browser window.

To launch the report in a separate browser window, select File > Application Preferences, then Reports tab, and select Launch a New Window.

SELECTING NEW MEASURE PERMISSIONS

New scorecard permissions have been added to the Scorecard Permission Setup window. These permissions, for both Accountability and Strategy elements, enable you to restrict access:

- Unless the selected scorecard is a child of a scorecard to which the user has access
- Unless the selected scorecard is a parent of a scorecard to which the user has access

For a more detailed explanation of access levels and permissions, refer to Chapter 2, “Managing User Accounts and Authorization” in the *Hyperion System 9 Performance Scorecard Administrator’s Guide*.

REPOSITIONING THE VIEW PANE TABS








Depending on your personal preference, you can reposition the My View, Browser and Object tabs from the bottom to the top of the View pane. This is a preference setting. For more information, refer to the *Hyperion System 9 Performance Scorecard User’s Guide*.

SETTING DEFAULT PERFORMANCE INDICATORS

In previous releases, the default performance indicators were all the same shape, and were differentiated by color as red, green or yellow. With this release, a new set of default performance indicators are available in Performance Scorecard to make it easier to differentiate between the status indicators when printed in black and white, or for users who may not be able to distinguish colors.

The default performance indicators are shown on the following table.

Table 2 Default Performance Indicators

SYMBOL	PERFORMANCE DESCRIPTION
	Poor
	Poor, but improving
	Poor, and declining
	Good
	Good, and improving
	Good, but declining
	Average

The default performance indicators are available in the Performance Scorecard installation directory. By default, the folder is located at <Hyperion Installation Directory>\webreportsDomain\webapps\HPSWebReports\images\status\508_compliant.

Alternatively, you can access the folder using the following URL:

`http://<computer name>:18080/HPSWebReports/images/status/508_compliant`

For detailed instructions on using default or custom performance indicators, refer to the Hyperion System 9 Performance Scorecard *Application Designer's Guide*.

MODIFYING UI THEMES

This release of Performance Scorecard supports multiple visual themes, and enables end-users to select the theme they wish to use. Each theme contains a set of cascading style sheets and images that is used to create the graphical look when that theme is selected. Many visual aspects of the application are controlled by these themes, such as fonts, colors, icons, backgrounds, and so on.

Performance Scorecard uses two UI themes: Hyperion and Hyperion Alternate. These UI themes are very similar, with Hyperion Alternate offering a higher-contrast look for enhanced visibility. You can select an existing UI theme as your preference, as outlined in the *Preferences* chapter in the *Hyperion System 9 Performance Scorecard User's Guide*.

You can also modify the existing Hyperion UI theme, or add a new theme to a deployed Hyperion Performance Scorecard application, as outlined in *Hyperion System 9 Performance Scorecard Administrator's Guide*.

CUSTOMIZING THE APPLICATION USING CLIENT.CSS

If customers modify their theme style sheets, they need to be updated each time a new release of Hyperion Performance Scorecard is installed.

With this release, an empty file called the `client.css` file is available for you to add your style customizations for Performance Scorecard. Make any modifications or style sheet customizations to this file, and they are automatically implemented in the application. If there is a need for a subsequent upgrade, these changes are automatically picked up.

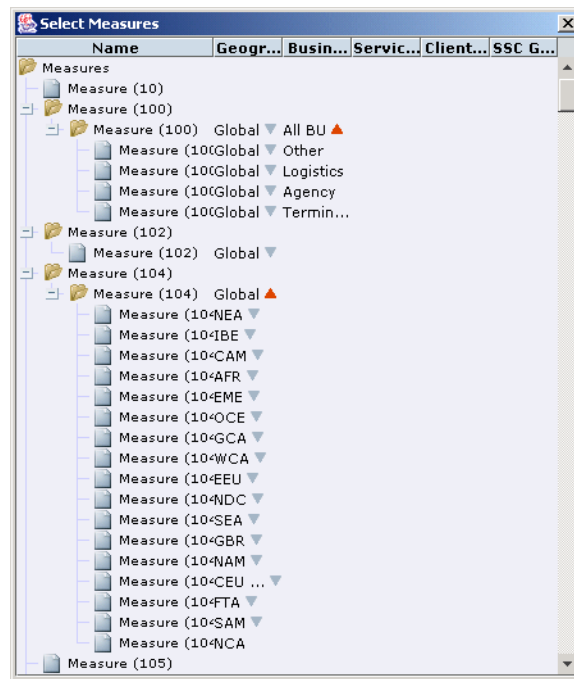
When the application is updated with Performance Scorecard changes, the changes you have made in the `client.css` file not be affected.

For additional information on customizing Performance Scorecard, refer to Appendix A, “Customizing Hyperion System 9 Performance Scorecard and the Alerter” in the *Hyperion System 9 Performance Scorecard Administrator’s Guide*.

MEASURES AND SCORECARDS SELECTION BOX

Previously, when selecting measures or scorecards, the list was displayed in a flat format, which showed a single long list and required lots of scrolling to select an item.

Now when selecting measures or scorecards from a selection box, they are displayed in a hierarchical format to make selection easier.

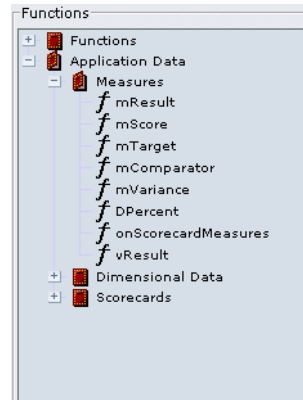


Expand the hierarchy to display all available scorecards or measures.

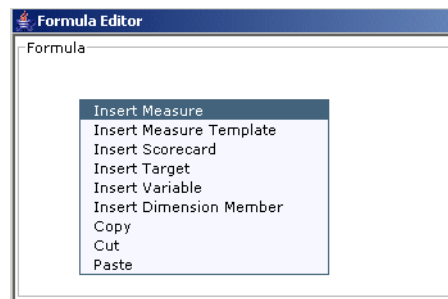
FORMULA EDITOR ENHANCEMENTS

The Formula Editor that you use to build complex measure and range formulas has been enhanced to provide:

- More intuitive arrangement of functions. Functions that you can use to perform calculations using business objects are grouped by type.



- Additional ways to use functions, such as right-clicking in a formula to insert values such as measure results and scorecard scores.



For detailed information on using the Formula Editor, refer to the *Hyperion System 9 Performance Application Designer's Guide*.

PERFORMANCE SCORECARD ADAPTER

This release provides the following versions of the Performance Scorecard Adapter:

- Version 3.0.7 if you are using Vignette Business Integration Studio (VBIS) 6.1 and Hyperion Application Link 3.0
- Version 9.2 if you are using Vignette Business Integration Studio (VBIS) 7.0 and Hyperion System 9 Application Link 9.2.

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