

CA Clarity PPM v14.1

Strategic Alignment Documentation  
Release 4 – Installation Procedure

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# Installation Instructions

## Pre-reqs

Strategic Alignment assumes:

1. You have XOG v13 installed
2. You have a user called “xog” that has a password “gox” with **all access rights** to xog stuff in.
3. If you want to use the Strategic Heat Maps and Hierarchies you will need to load the “Hierarchical Views” package as a pre-requisite to this installation. It can be loaded at a later stage, but the Strategic Heat Maps and Hierarchies will only work after that.

## Installing the Application

1. Login as Administrator
2. Navigate to System Options
3. Set your Login Timeout to a large number (300) to make sure XOG doesn’t timeout during the installation
4. Download the Strategic Alignment ZIP file from the CA Wiki page.
5. Unzip the package file into your c:\temp folder.
6. Navigate to C:\Temp\StratAlignment\_v4
7. Right-Click the file “StratAlignment\_v4Install.bat” and select “Edit” from the Drop Down Menu
8. Locate the line where the XOG\_HOME variable is set and replace the path to reflect your XOG installation path
9. Locate the line where the SERVERNAME variable is set and replace the value with your server name or IP address
10. Locate the line where the PORTNUMBER variable is set and replace it with the appropriate value (normally, it’s 80)
11. Locate the line where the USERNAME variable is set and replace it with the username you will use (default is the ‘xog’ user)
12. Locate the line where the PASSWORD variable is set and replace it with the password for that user (default is ‘gox’)
13. Save this file
14. If there are any additional instructions inside the file – please follow those instructions
15. Run the file by double-clicking it.
16. Navigate to C:\Temp\StratAlignment\_v4\output
17. Check all the output files for errors.
18. You shouldn’t see any errors. If you do, try to verify the reason and correct it. It’s ok to run it again after you correct something. If you don’t find the problem, drop me a note and I’ll try to help you out.
19. If you find an empty file it may be because XOG Timed Out before writing the log file. Normally, the file will have been executed correctly after a while. You may run only that file again, just to be sure, or you can check CA PPM and see if the changes were correctly applied.
20. Security warnings for Pages and Portlets are normal – they will be corrected when the Groups are loaded. Security warnings for Groups are also normal – they will be corrected when Seed Data is loaded.

## Post-installation procedures

1. Login to Clarity with “Admin”
2. Go to the Admin tool
3. Click on Processes
4. Filter all processes starting with “Strat”.
5. Activate all listed processes by clicking on them, navigating to “validation” and clicking on “Validate All and Activate”.
6. There are known issues with Links and Actions. You will need to make some adjustments manually:
   1. Open the “Strategic Item” object
   2. Click Actions
   3. Open the “Generate Portfolios” action.
   4. Notice the Process name is not there. Correct that situation, selecting the Process called “Generate Portfolio”.
   5. The “Map to Attribute” attribute must be left “blank” – that means it will map to ODF\_PK
   6. Repeat steps c and d for process “Recalculate KPIs and Item Status now”
   7. Open the “Strategic Indicator” object
   8. Click Views
   9. Click Fields for the List View
   10. Click Properties for the Measurements virtual attribute
   11. Choose the Correct Link: General SubPage Strategic KPI KPI Measurement List link
   12. Click Properties for the Targets virtual attribute
   13. Choose the Correct Link: General SubPage Strategic KPI KPI Targets List link
   14. Save and Return
   15. Open the Query “Indicators By Strategic Item” and click “Links”
   16. Correct the link for “Measurements”: Strategic Indicator Indicator Measurements List Link. The Parameter is “itemintlid”
   17. Correct the link for “Targets”: Strategic Indicator Indicator Targets List Link. The Parameter is “itemintlid”
   18. Repeat steps p and q for the following queries:
       * “Strategic Hierarchy with Indicators”
       * “Strategic Indicator Hierarchy”
       * “Strategic Indicator Hierarchy by Indicator”
   19. Open the Query “Perspective Hierarchy with Indicators” and click “Links”
   20. Create two new Links
       * Name: “Measurements”
       * Code: strat\_measurements
       * Action: Strategic Indicator Indicator Measurements List Link
       * Internal ID: itemintlid

and

* + - Name: “Targets”
    - Code: strat\_targets
    - Action: Strategic Indicator Indicator Targets List Link
    - Internal ID: itemintlid
  1. Open the Portlet “Perspective Hierarchy with Indicators” and go to “Fields” in “List Column Section”
  2. Correct the link for “Measurements” and “Targets” virtual attributes accordingly.
  3. Open the Query “Strategic Top-Down Funding” and click “Links”
  4. Create a new Link
     + Name: “Strategic Top-Down Planning”
     + Code: strat\_topdown\_planning
     + Action: Strategic Item Top-Down Planning by Stage Link
     + Strategic Item Internal ID: itemintlid
  5. Open Portlet “Strategic Top-Down Benefits” and go to “Fields” in “List Column Section”
  6. Correct the Link for “Top-Down Planning” virtual attribute: should be “Strategic Top-Down Planning”
  7. Repeat step y and z for portlets:
     + “Strategic Top-Down FTEs”
     + “Strategic Top-Down Funding”

1. If you are not using Strategic Maps, perform these additional steps:
   1. Go to Portlet Pages
   2. Find “Strategic Item Default Layout”
   3. Click “Tabs”
   4. On the “Strategic Map” tab de-select the “Active” column
   5. Repeat the same process for the “Hierarchy” tab of the “Strategic Indicator Default Layout” Portlet Page



* 1. Remove The Hierarchy Icon from:
     + Object Strategic Item, List View
     + Object Strategic Indicator, List View
     + Portlet: Strategic Hierarchy with Indicators
     + Portlet: Strategic Indicator Hierarchy

## Installing Demo Data

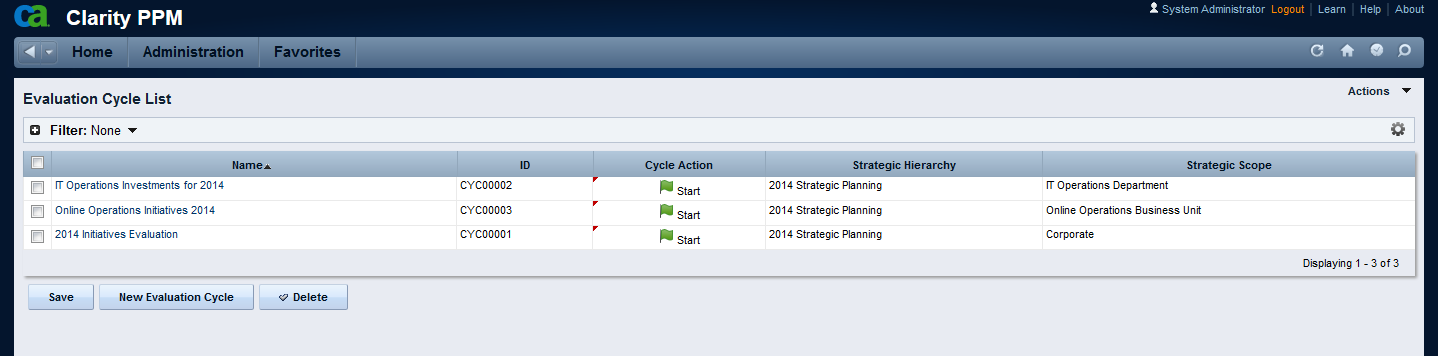
1. After installing the application, if demo data is necessary, follow these steps
2. Right-Click the file “StratAlignment\_v4Install\_Demo.bat” and select “Edit” from the Drop Down Menu
3. Locate the line where the XOG\_HOME variable is set and replace the path to reflect your XOG installation path
4. Locate the line where the SERVERNAME variable is set and replace the value with your server name or IP address
5. Locate the line where the PORTNUMBER variable is set and replace it with the appropriate value (normally, it’s 80)
6. Locate the line where the USERNAME variable is set and replace it with the username you will use (default is the ‘xog’ user)
7. Locate the line where the PASSWORD variable is set and replace it with the password for that user (default is ‘gox’)
8. Save this file
9. Run “StratAlignment\_v4Install\_Demo.bat”

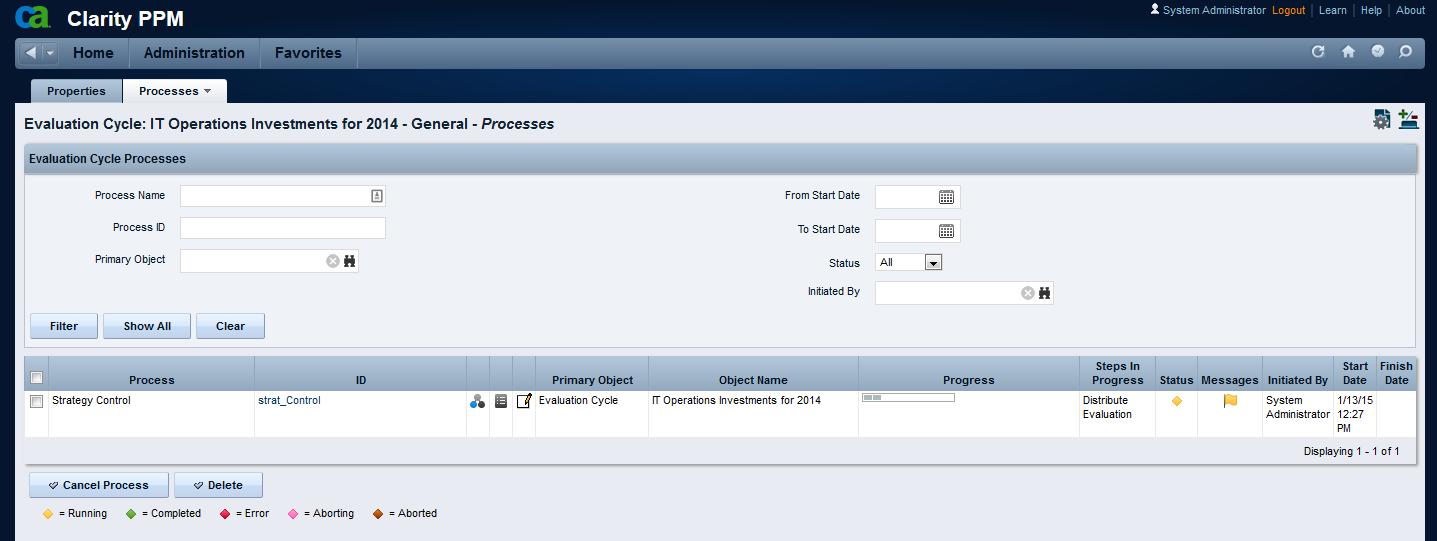
## Demo Data Post-Installation

To finish installing demo-data, follow these steps:

1. As an Admin, login to the application. Navigate to “Evaluation Cycles” under “Strategic Alignment”



1. You’ll see three different cycles. They are all in Wait state. Change the Cycle action to “Start” and Save.
2. Now there should be a process on each one of those Cycles, and they should be at the “Distribute Evaluation” Step. If the process is in error for any reason, just restart the process – or cancel and start another instance. This is known to happen for an unknown reason.



1. Change the Cycle Action to “Close” for all three Cycles and Save.



1. All three processes should now finish successfully.



1. The installation process of Demo Data is now complete.

# Technical Summary

## Object Description

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Object** | **ID** | **Master – Subobject** | **Description** | **Additional information** |
| Strategic Dimension | strat\_dim | Master Object | Dimensions are types of Strategic Maps and are related to Alignment Attributes in the Investment Object.  e.g. The “Department” dimension will be used to calculate the “Department Alignment Score” | Three Dimensions are delivered as “Seed Data”:   * Department; * Business Unit; * Corporate   Additional dimensions can be easily created |
| Strategic Scope | strat\_scope | Master Object | Scopes are instances of dimensions.  e.g. The “IT Operations Department” is a scope that allows the IT Strategy Team to build an IT Strategy, either stand-alone or linked to a Corporate Strategy Plan. | Five Scopes are delivered as “Seed Data”. |
| BSC Perspective | strat\_bsc\_persp | Master Object | BSC Perspectives are aligned to the Balanced Scorecard tool.  e.g. the “Customer” perspective. | Four Perspectives are delivered as “Seed Data”:   * Financial; * Customer; * Internal Processes; * Learning and Growth |
| Strategic KPI | strat\_kpi | Master Object | KPIs are used to set targets and capture measurements on Key Indicators related to your Strategic Plan. KPIs are scope-specific.  e.g. “Customer Satisfaction Index” is a Key Indicator of the “Corporate Strategy” scope; “IT Customer Index” is a Key Indicator of the “IT Operations” scope  KPIs can also have their own hierarchy and cascade status from child KPIs to parent KPIs | KPIs are delivered as “Demo Data” |
| KPI Target | strat\_kpi\_target | Subobject to Strategic KPI | Targets are used to establish your goals for a specific period.  e.g. We set a Target of “95” for “Customer Satisfaction Index” KPI at the end of 2011, “97” at the end of 2012, “99” at the end of “2013” | Targets are delivered as “Demo Data”. Demo targets are set by Year. |
| KPI Measurement | strat\_kpi\_measure | Subobject to Strategic KPI | Measurements are used to assess how we’re comparing to our targets  e.g. We have measured “Customer Satisfaction Index” on Q1 2011 as “90” and Q2 2011 as “92” | Measurements are delivered as “Demo Data”. Demo measures are set by Year, Quarter or Month, depending on the nature of the KPI. |
| Item Status Scale | strat\_item\_scale | Subobject to Strategic KPI | The Item Scale is used to normalize different KPI scales to allow more flexibility. By default the scale is initialized with a given range for each value, but those ranges can be personalized by KPI.  e.g. From 95% to 103% = On Target; From 103% to 9999% = Exceeded Target | Item Scales are delivered as “Demo Data”. |
| Strategic Item | strategic\_item | Master Object | Strategic Items are the “heart” of the system. Items are created and can be related to each other in a parent-child relation building a “Strategic Hierarchy”. Some facts about Strategic Items:   * Items are related to a Scope; * Items may be related to a Perspective; * Items are classified in Levels; * Items may have a Parent Item; * Items may be related to KPIs (that monitor their execution) * Items may be related to Alignment Metrics (that help evaluate Investments against those items) |  |
| Investment Alignment Metric | strat\_align\_metric | Master Object | Alignment Metrics are used to assess Investments (Ideas, Projects, Programs, etc) against the Strategic Items in your Strategic Plan.  e.g. “$ Cost Reduction” | Alignment Metrics are delivered as “Demo Data”. |
| Alignment Scale | strat\_metric\_scale | Subobject to Investment Alignment Metric | The Metric Scale is used to normalize different Metrics in a way they can all be compared and used in a formula.  e.g. $ Cost Reduction of 500,000 is “Above Average”, giving an alignment score of “60” | Alignment scales are part of the Alignment Metrics “Demo Data”. |
| Evaluation Cycles | strat\_eval\_cycle | Master Object | Evaluation Cycles are used to Evaluate initiatives against your Objectives by using the Alignment Metrics associated with those Objectives. | Three evaluation cycles, one for each Dimension, are delivered as “Demo Data”. |
| Strategic Evaluations | strat\_evaluation | Master Object | Strategic Evaluations are created automatically by Workflow during the execution of a cycle. They contain a “Question” about an “Investment” that should be answered by the Investment’s Manager according to the Investment Business Case. They are subject to instance-based security – only the Investment Manager can Edit these records (as well as the Administrator) | Strategic Evaluations for the three Evaluation Cycles are delivered as “Demo Data” |
| Strategic Tree Flat | strat\_tree\_flat | Master Object | This object is generated automatically via Workflow and is just used as an auxiliary table for building Multi-Scope Portlets. Users should NOT have access to this object in the UI. | Strategic Tree Flat items are delivered as part of “Demo Data” referring to Strategic Items and the three Scopes. |

## Pages

|  |  |  |  |
| --- | --- | --- | --- |
| **Page** | **ID** | **Custom TABs** | **Description** |
| [BSC Perspective Default Layout](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strat_bsc_perspFrame&id=5009062&obsType=Page&principal_type=SYSTEM&principal_id=0) | odf.strat\_bsc\_perspFrame | Dashboard | Portlets showing Strategic Items Hierarchy and Projects Hierarchy related to that BSC Perspective |
| [Evaluation Cycle Default Layout](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strat_eval_cycleFrame&id=5009056&obsType=Page&principal_type=SYSTEM&principal_id=0) | odf.strat\_eval\_cycleFrame | n/a |  |
| [Investment Alignment Metric Default Layout](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strat_align_metricFrame&id=5009038&obsType=Page&principal_type=SYSTEM&principal_id=0) | odf.strat\_align\_metricFrame | n/a |  |
| [Strategic Dimension Default Layout](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strat_dimFrame&id=5009044&obsType=Page&principal_type=SYSTEM&principal_id=0) | odf.strat\_dimFrame | n/a |  |
| [Strategic Evaluation Default Layout](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strat_evaluationFrame&id=5009050&obsType=Page&principal_type=SYSTEM&principal_id=0) | odf.strat\_evaluationFrame | n/a |  |
| [Strategic Item Default Layout](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strategic_itemFrame&id=5009020&obsType=Page&principal_type=SYSTEM&principal_id=0) | odf.strategic\_itemFrame | Top-Down Planning  Dashboard  Strategic Map | Properties page pertaining to Top-Down Planning  Strategic Items Hierarchy and Projects Hierarchy  Graphical Hierarchical Views |
| [Strategic KPI Default Layout](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strat_kpiFrame&id=5009026&obsType=Page&principal_type=SYSTEM&principal_id=0) | odf.strat\_kpiFrame | Dashboard  KPI Hierarchy | Strategic Items Hierarchy and Projects Hierarchy  Graphical Hierarchical Views |
| [Strategic Review](http://claritylatam50/niku/nu#action:npt.getPage&pageId=strat_ReviewFRAME&id=5009067&obsType=Page&principal_type=SYSTEM&principal_id=0) | strat\_ReviewFRAME | Strategic Review  Top-Down Planning  Strategic Projects  Strategic KPIs  Evaluation Cycle Results | Hierarchy of Strategic Items with their KPIs  Hierarchy of Strategic Items with their Top-Down info  Hierarchy of Strategic Items with their supporting Projects  KPI Targets and KPI Measurements information  Investment Alignment calculation from Evaluation Cycles |
| [Strategic Scope Default Layout](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strat_scopeFrame&id=5009032&obsType=Page&principal_type=SYSTEM&principal_id=0) | odf.strat\_scopeFrame | n/a |  |
| [Strategic Tree Flat Default Layout](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strat_tree_flatFrame&id=5009014&obsType=Page&principal_type=SYSTEM&principal_id=0) | odf.strat\_tree\_flatFrame | n/a |  |

## Processes

|  |  |
| --- | --- |
| **Process** | **Description** |
| Strategic Alignment Metric Initialize | Every time you create a new Investment Alignment Metric this process creates a blank set of “Alignment Scales” From Null (0) to Extraordinary (100) |
| Strategic Allocation Percentage | This process is used to Initialize the Allocation Percentage used in Top-Down Planning with the same value as the Weight % calculated for each Item. On Multi-Scope systems, the overlapping nodes (i.e. a “parent” with “children” in various scopes) will do an equal split between the different scopes, as Weights sum 100% *per scope*  Also, Initializes “Allocations” and “Top-Down Received” attributes with Zero value for Benefits, Funds & FTEs. |
| Strategic Fund Allocation Initialization | Copy Top-Down Planning values to Allocated values for Lower Level Items  Resets Allocated Values for Parent Items to zero. |
| Strategic Item – Build Tree Flat | Every time you change a Strategic Item this process will create records in the Strategic Tree Flat table with the Item’s parents and children in all levels up and down. |
| Strategic Item – Clean up Tree | Every time you delete Strategic Items you should manually execute this process to Clean Up the Strategic Tree Flat table |
| Strategic Item – Rebuild Tree | Use this to rebuild the Strategic Tree Flat table in case of need (Example: if you XOG in new Strategic Items while the “Build” Process is inactive). |
| Strategic Item Status Initialize | Every time you create a new KPI this process creates a default set of “Item Scales” From 0 (Undefined) to 6 (Exceeded Target) and you may adjust the Percentage ranges corresponding to each one. |
| Strategic KPI Calculation | Every time you change KPI Targets, KPI Measurements, KPI Settings or Status Settings, Item Settings, or the KPI Item Status Scale you should run this process manually to update their “KPI Target x Measurement”, “KPI Rollup from Children”, “KPI Status” and “Item Status” attributes and the Strategic Item’s corresponding attributes. The process is available as an Action both from the Strategic Item and the Strategic KPI Properties and List views. |
| Strategic Portfolio Creation | You should execute this process after finishing your Top-Down Planning cycle to generate the corresponding portfolios automatically. You don’t need to do it for all levels, just for those you want to manage using the Portfolio Plans, Targets and Waterlines. Lower Level Items get automatically included in parent items; Investments are selected based on the “Strategic Funding Source” attribute. |
| Strategic Rollup Allocated and Committed Funding | This process is used to sum the Allocated values and the Committed values all the way from the lower-level items to their parents. |
| Strategic Top-Down Planning Calculation | This process will distribute funds from the associated Strategic Item -> Downwards using the % Allocation defined.The values will go both to the Top-Down *Received* attributes and to the Top-Down attributes. The first ones hold this value in a read-only attribute. The second ones can be adjusted to allow for some “strategic reserve” of funds/FTEs. |
| Strategy Control | Every time you create a Strategic Cycle this process will help Distribute the Evaluation Questions; once they are answered it will Calculate Weights, Calculate the Alignment Scores and Update Investments. |