Performance Analytics

Powered by Horizon Business Insight

Rollout Notes

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Copyright notice

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Reader comments

Any comments or suggestions regarding this publication are welcomed and should be forwarded to the attention of:

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All software releases are cumulative. If you are not upgrading from the most recent version of this software, please review the release materials distributed with any prior releases for changes or enhancements that might affect your system.

Horizon Business Insight 15.0 Dashboard

Horizon Business Insight 15.0 introduces the Public Dashboard. Much like the Personal Dashboard, when you create a Public Dashboard page, you can display multiple objects on the page, each object in its own portlet. In addition, however, Public Dashboard pages can be viewed by any user in your organization who has been granted access to the page.

This document provides a high-level overview of how to use the new Public Dashboard and the improved Personal Dashboard. Detailed documentation is available by selecting Help from the menu bar in the Dashboard or by clicking ? on a portlet's menu bar.

About dashboard views and privileges

The new Horizon Business Insight 15.0 Dashboard has three views: the Personal Dashboard, the Public Dashboard, and the Admin view. Your access to the various views in the Dashboard is determined by the dashboard-related privileges which you have been granted.

The table below describes the Dashboard views and the privilege required to access each view.

Dashboard view	Required privilege (*in default order*)	Description
Public Dashboard	Public Dashboard Access	Allows holder to access the Public Dashboard and view those public pages to which permission has been granted.
Personal Dashboard	Personal Dashboard Access	Allows holder to access the Personal Dashboard and view, create, edit, delete and rename their own personal pages.
Admin	Public Dashboard Administration	Allows holder to access the Admin area and administer public pages for any entity to which the holder has been granted access. Administration of public pages includes the following tasks: • create new public pages, • add/edit portlet content on public pages, • view existing public pages, • edit, delete, rename existing pages, • grant user and group access to view one or more public pages.

Dashboard privileges and permission to view Public Dashboard pages are granted to users and groups in the Horizon Business Insight Administrator web site.

Access the Dashboard from the Viewer

When you click the Dashboard link in the Viewer (as shown below), you are automatically directed to the dashboard view associated with the privilege you have been granted that is highest in the default order. (Refer to the Required privilege column in the table above.)

For example, assume you have been granted both the *Personal Dashboard Access* and the *Public Dashboard Access* privileges. When you click on the Dashboard link in the Viewer, the Public Dashboard view is displayed.

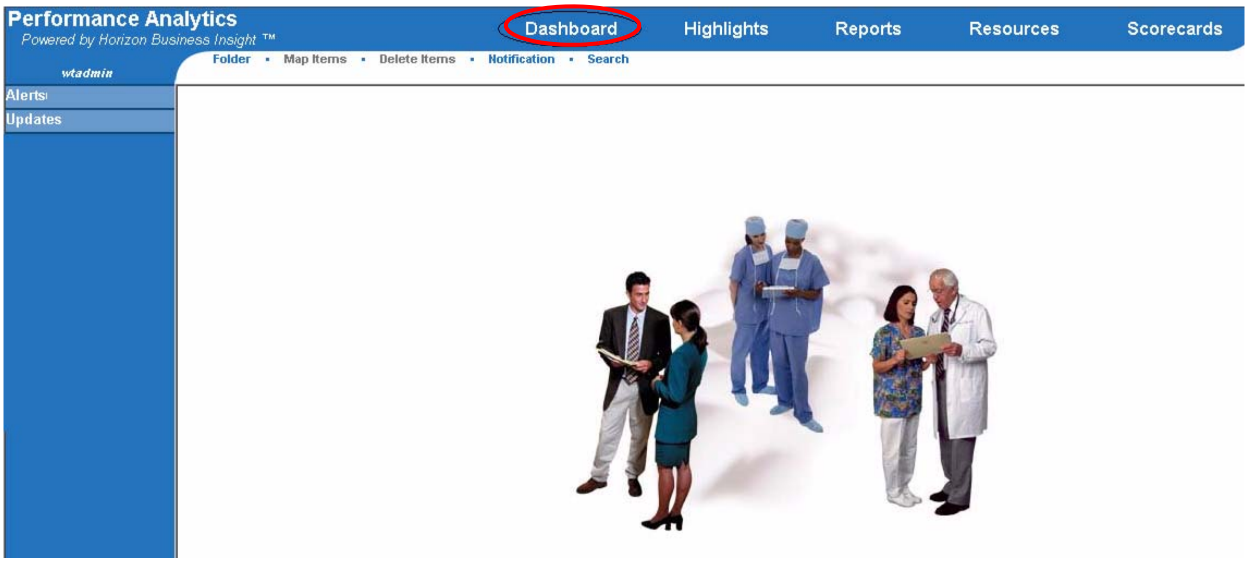


Figure 4-1 Horizon Business Insight Viewer with Dashboard link.

Once you are in the Dashboard, regardless of the view, you can easily navigate between all dashboard views to which you have been granted access.

To do so, click on **Admin**, **Personal Dashboard** or **Public Dashboard** in the menu bar to access the desired view. Only links to views to which you have been granted access are displayed in the menu bar.

Figure 4-2 Dashboard menu bar with all views displayed.

You can easily return to the Viewer at any time simply by clicking on the **Performance Analytics** logo in the upper left on the menu bar.

Create a dashboard page

The steps to create a dashboard page have been streamlined in Horizon Business Insight 15.0. This section describes how to create a new public or personal page.

With the addition of the Public Dashboard and new privileges, it is important to remember that before you can create either a personal page or a public page, you must have the required dashboard privilege and you must access the proper Dashboard view where the new page is created.

1. Select Dashboard view: Choose the appropriate Dashboard view from the menu bar depending on whether you want to create a personal page or a public page.

New page type	Dashboard view	Required privilege
Personal page	Personal Dashboard view	Personal Dashboard Access
Public page	Admin view	Public Dashboard Administration

If you are creating a new public page, you must first choose the home entity for the new page. The description of the entity currently selected is displayed below the dashboard menu bar in the Admin view. Click located to the far right of the entity description and select the desired home entity for the page. All entities to which you have access are listed. Once you have created a page in an entity, you cannot change the home entity of the page.

An entity selection is not necessary when creating a personal dashboard page.

2. Select New Page icon: From the appropriate dashboard view, click the new page icon located on the far right of the Dashboard view below the menu bar. In the Admin view, the icon is located on the far right, below the entity description.

Figure 4-3 New Page icon in the Personal Dashboard.

When you click the New Page icon, a tab is created on the navigation bar for your new page.

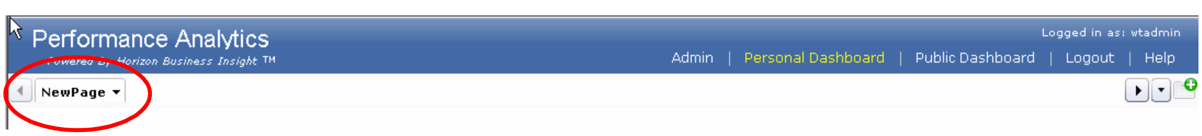


Figure 4-4 New page tab added to navigation bar in the Personal Dashboard.

3. Name the page: Double-click on the tab and type the desired name, overwriting the default text, and then click **Enter**.

In the picture below, the new page has been named: **Budget**.

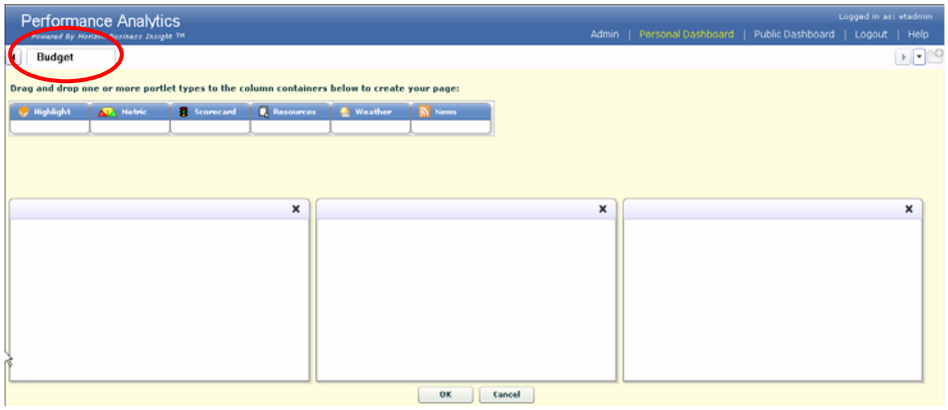
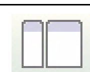
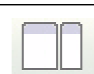


Figure 4-5 New “Budget” page with page tab shown on the navigation bar.

4 Establish your page layout: By default, a new page includes a three-column page layout. (See figure above.) Use the icons described below to define the desired layout for the current dashboard page.

- Click  to eliminate the associated column from the page layout.
- Click  (*not shown in the picture above*) to add another column to a one or two-page layout.

If you choose a two-column layout, click the applicable icon (*shown below*) to define the width of each column:

2-column layout	Layout Icon	Description
1/3 - 2/3		Column 1 is 1/3 and Column 2 is 2/3 of the total width.
1/2 - 1/2		Column 1 and Column 2 are each 1/2 of the total width.
2/3 - 1/3		Column 1 is 2/3 and Column 2 is 1/3 of the total width.

5 Add portlet types to columns on the page: Drag and drop the portlet type icons located above the column containers (See Figure 4-5.) to the desired location in each column. You can drag the icons up and down in a column and from one column to another. To remove a portlet from the page, click the **X** on the portlet type icon.

You can choose from the following portlet types in both the Personal Dashboard and the Public Dashboard:

Highlight, Metric, Scorecard, Resources, Weather, News

6 Save the page: Click **OK** to save your page design and view the new page.

Content must be added to each portlet from within the portlet. You can create and save your new page now and then come back at a later time to add content to the portlets on the page.

Alternatively, you can add the content to the portlets on the page immediately after saving the page. Follow the steps in the next section to add content to the portlets you have placed on your page.

Add content to a portlet

Before you can add content to a portlet, you must create a Public Dashboard or a Personal Dashboard page with the appropriate portlet type on the page.

To add content to a portlet, you must be in the proper Dashboard view, depending on whether the portlet is on a Public Dashboard page or a Personal Dashboard page.

Page type	Dashboard view
Personal page	Personal Dashboard view
Public page	Admin view

Content must be added from within each of the portlets. The steps for each portlet type are slightly different; therefore, the procedure provided here is only an overview. For specific instructions related to each portlet type, access the portlet-specific help by clicking located in the menu bar of the applicable portlet.

If you created a Personal Dashboard in Horizon Business Insight 14.0, you will note that the steps necessary to add content to an existing portlet have not changed in this release.

1 On the portlet menu bar, click to switch the portlet to Edit mode.

2 If the portlet is on a public page, select the home entity of the object you want to display in the portlet. You can skip this step if the portlet is on a personal page.

3 Select the desired object(s) for the portlet type: a Highlight, a Scorecard, a Scorecard row or one or more Resources. For the News portlet, enter the URL to the desired news feed; for the Weather portlet, enter the postal code for the desired location.

4 Establish portlet display settings, if any, based on the portlet type.

5 Click **OK** to save your portlet content and return the portlet to View mode.

View a dashboard page

When you access the Personal Dashboard, Public Dashboard, or Admin view, all of the existing pages in the view are shown as tabs along the navigation bar. In a dashboard view to which you have been granted the Required privilege, you can view the following:

• Personal Dashboard	All pages you have created.
• Public Dashboard	All pages which you have been granted permission to view. You can only see portlets on the page if you have been granted permission to view the object selected for display in the portlet, i.e., the highlight, the scorecard or the resources.
• Admin	All public pages created in an entity to which you have Entity Access privilege. You can only view pages for one entity at a time. If you have not been granted permission to view an object selected for display in the portlet, i.e., the highlight, the scorecard or the resources, you will see an empty portlet on the page.

The first tab on the navigation bar is your default page for the selected view and is automatically displayed when you initially access the dashboard view after logging into the Viewer. To view a page other than the default page, click on the desired tab to display the portlets on the selected page.

In the picture below, three pages are displayed on the navigation bar: **Revenue**, **Budget**, **Performance**. The Revenue page is displayed.

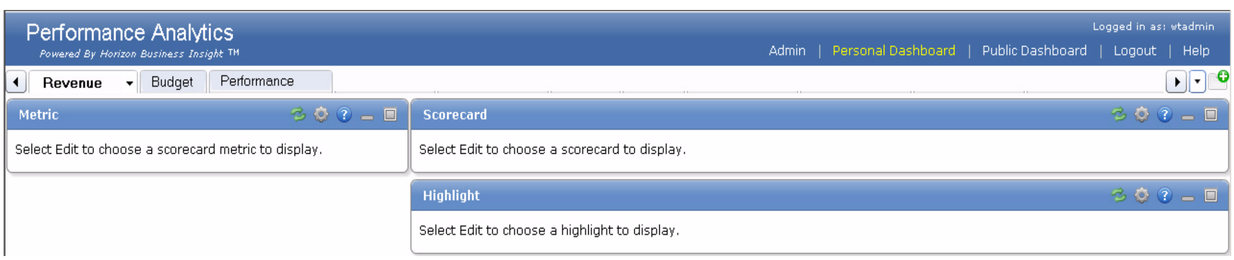


Figure 4-6 Personal Dashboard view with three pages; Revenue page includes three portlets.

The page layout for the sample Revenue page shown in the picture above is a two-column layout in the1/3 - 2/3 format.

Column 1 displays a Metric portlet; Column 2 displays a Scorecard portlet and a Highlight portlet. No content has been added to any of the portlets in this example.

Modify a dashboard page

Once you have created a public or personal page and viewed it, you may decide to perform one or more of the following procedures:

- Change the page layout
- Change or move the portlet types on the page
- Delete a page from the dashboard

To modify a dashboard page, follow the steps below.

1. Depending on whether you are working with a personal page or a public page, select either the Personal Dashboard view or the Admin view from the Dashboard menu bar.
2. Click on the tab of the desired page to make it the active page.
3. Click on the drop down icon on the tab of the active page and select the desired option, described below, from the list.

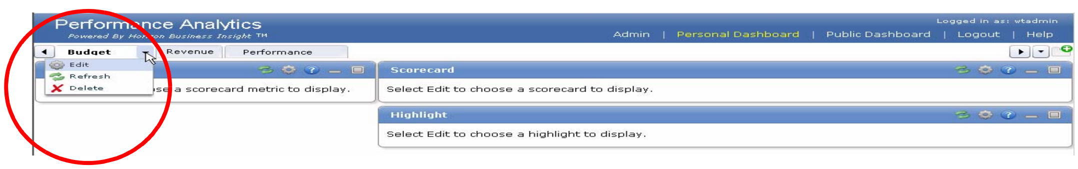


Figure 4-7 Tab drop down list with page management options. Drop down list displays the same options in the Personal Dashboard view and the Admin view.

- Edit: Select [gear icon] to modify the page layout or change portlet types or the location of the portlets on the page.

  Refer to the section of these notes entitled, Create a dashboard page on page 3 for more information about designing the page layout and adding or removing portlets on a page.

  You can also rename a page while in edit mode. (See Rename a page on page 8.)

- Delete: Select [X icon] to remove an existing page from the Dashboard.

Refresh a page; refresh a portlet

The dashboard allows you to refresh an entire page or to refresh a single portlet.

Page refresh: Click **Refresh**, located on the drop down list on the page tab, to update the active personal or public page.

Use the page refresh to display new portlets added or remove portlets eliminated from the page; to update the order of the portlets on the page, and display modifications to the page layout or page name.

Pages can be refreshed in the Personal Dashboard, Public Dashboard and the Admin view. You cannot refresh a page when you are editing it.

Portlet refresh: Click **Refresh** , located on the menu bar of any portlet, to update the content displayed in the portlet.

Use the portlet refresh to update for changes made to the portlet display settings, if any, and to update the data displayed in the portlet. In addition, any changes made to the display settings for the selected object in the Highlight Editor, Scorecard Editor or Viewer (as applicable to the specific portlet type) are also updated in the portlet.

You cannot refresh a portlet when you are editing it.

Rename a page

Follow the steps below to change the name of an existing dashboard page.

1. Depending on whether you want to rename a personal page or a public page, select either the Personal Dashboard view or the Admin view, as applicable.
2. Click on the tab you want to rename to make it the active page.
3. Double-click on the text on the tab to highlight the existing name.

   Note: Alternatively, you can combine steps 2 and 3 above. To do so, simply double-click on the tab to select the desired page and highlight the existing name in a single step.

4. Type the new name, overwriting the existing text on the tab, and then click **Enter**.

Reorder pages

Follow the steps below to change the location on the navigation bar of an existing page tab.

1 Depending on whether you want to relocate a personal page or a public page, select either the Personal Dashboard view or the Public Dashboard view.

Note: Public pages cannot be reordered in the Admin view. Reorder the public pages to which you have access from the Public Dashboard view.

2 Click on the desired tab.

3 Drag the tab along the navigation bar and drop it into the desired location.

Add a public page to your Personal Dashboard

You can add a copy of an existing public page to your Personal Dashboard. To do so, follow the steps below.

1 Select the Public Dashboard view from the Dashboard menu bar.

2 Click on the tab of the desired page to make it the active page.

3 Click on the drop down icon on the page tab and select **Add to Personal**.

4 Click **OK** to confirm. The selected page is added to your Personal Dashboard with the page name displayed as: *Copy of [public page name]*.

The next time you access your Personal Dashboard, the page(s) you added can be found on the far right on the navigation bar. Scroll to the right or use the drop down list of page names to access the page. You can rename the page or reorder the page along the navigation bar.

Dashboard and portlet documentation

Detailed documentation for the Dashboard and for each of the portlet types is available as follows:

- From the Dashboard menu bar, click Help for assistance with creating and managing personal and public dashboard pages.
- From the menu bar on a portlet, click  for assistance with selecting and modifying portlet content and portlet display options. Specific help is available for each portlet type from within the portlet.

Updating your SQL Server environment for use with DTS

Microsoft has indicated that errors may be encountered when attempting to open and/or edit new or existing DTS packages in a SQL Server 2005 or SQL Server 2008 environment. In order to prevent these errors, you must update your SQL server environment.

More information related to both SQL Server 2005 and SQL Server 2008 environments can be found at the URL below:

support.microsoft.com/kb/917406

This section describes the information provided by Microsoft to assist you in resolving these environment issues. This information applies to:

- new DTS packages you create in SQL Server 2005 or in SQL Server 2008.
- existing DTS packages created and saved in SQL Server 2000 including any existing DTS packages associated with STAR Key Performance Indicators.

The specific tasks you must perform differ depending on whether your are running Horizon Business Insight 15.0 in a SQL Server 2005 or a SQL Server 2008 environment. Be sure to read the portion of the following section that is appropriate to your database environment.

Update a Microsoft SQL Server 2008 environment

Customers who intend to use DTS packages in a Microsoft SQL Server 2008 environment must perform certain procedures to install additional support for DTS packages. For more information, refer to the Microsoft article at the URL below:

http://technet.microsoft.com/en-us/library/ms143755.aspx

The Microsoft article at the link above is provided for information purposes only. You do not need to complete all the steps noted in the Microsoft article. Certain portions of the procedures have already been completed, by default, during the installation of your SQL Server 2008 software.

Follow the steps in this section to update your SQL Server 2008 environment as necessary for use with DTS.

If you are running Horizon Business Insight in a SQL Server 2005 environment, move on to the following section for the steps necessary to update your environment.

Install run-time support for Data Transformation Services packages

SQL Server 2008 does not install run-time support for DTS packages. Before you can run and manage DTS packages, you must perform the following procedure.

1 From the Microsoft website, download the following:

Microsoft SQL Server 2005 Backward Compatibility Components X64 package *(SQLServer2005_BC_x64.msi)*

This download can be accessed from the *Microsoft SQL Server 2008 Feature Pack, April 2009* page at the following Microsoft address:

http://www.microsoft.com/downloads/details.aspx?familyid=B33D2C78-1059-4CE2-B80D-2343C099BCB4&displaylang=en

2 Run the executable to install the files on the database server.

3 On the Feature Selection window, click on the arrow to select and install all of the following:

- Data Transformation Services 2000 runtime
- SQL Distributed Management Objects
- Replication component
- SQL virtual Device Interface
- Decision Support Objects

4 Click Next to continue.

5 Click Install.

6 Click Finish.

Install design-time support for Data Transformation packages

SQL Server 2008 does not install design-time support for DTS packages. You must perform the following procedure.

1 From the Microsoft website, download the following:

SQLServer2005_DTS.msi

This download can be accessed from the *Feature Pack for Microsoft SQL Server 2005 - December, 2008* at the following Microsoft address:

http://www.microsoft.com/downloads/details.aspx?FamilyID=536fd7d5-013f-49bc-9fc7-77dede4bb075&displaylang=en

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IMPORTANT: Click the **Download** button; do not download via the hyperlink on the *Feature Pack* page.

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2 Run the executable to install the files on the database server.

3 Reboot the database server.

Copy .dll files to a new location on the database server

After you have completed the procedures above and rebooted the HBI database server, follow the steps below to ensure that the DTS designer can be used in SQL Server Management Studio.

Copy the files noted in the table below to the location on the database server indicated in the table below.

1.	Copy these files:	SEMSFC.DLL, SQLGUI.DLL, SQLSVC.DLL
	From this folder:	ProgramFiles(x86)\Microsoft SQL Server\80\Tools\Binn
	To this folder:	ProgramFiles(x86)\Microsoft SQL Server\100\Tools\Binn\ VSShell\ Common7\IDE
2.	Copy these files:	SEMSFC.RLL, SQLGUI.RLL, SQLSVC.RLL
	From this folder:	ProgramFiles(x86)\Microsoft SQL Server\80\Tools\Binn\ Resources\[*lang_id*]
	To this folder:	ProgramFiles(x86)\Microsoft SQL Server\100\Tools\Binn\ VSShell\ Common7\IDE\Resources\[*lang_id*] (e.g., for U.S.English, the land_id subfolder is “1033”.)

You can now open the DTS package(s) in SQL Server 2008 and make your modifications.

Reschedule existing SQL Server Agent jobs

Customers migrating DTS packages to a new Microsoft SQL Server 2008 environment should note that all previously existing SQL Server Agent jobs including those scheduled to run DTS packages created and saved in SQL Server 2000 <u>must be recreated</u> after you have moved the packages to your SQL Server 2008 environment.

Update a Microsoft SQL Server 2005 environment

Customers who intend to use DTS packages in a Microsoft SQL Server 2005 environment must perform certain additional procedures to install additional support for DTS packages.

Follow the steps in this section to update your SQL Server 2008 environment as necessary for use with DTS. If you have already completed any of the procedures below during the implementation of your SQL Server 2005 environment, you do not need to do so again.

If you are running Horizon Business Insight in a SQL Server 2008 environment, this section does not apply to you. Follow the steps in the previous section to update your environment.

Install design-time support for Data Transformation packages

SQL Server 2005 does not install design-time support for DTS packages. You must perform the following procedure.

1 From the Microsoft website, download the following:

SQLServer2005_DTS.msi

This download can be accessed from the *Feature Pack for Microsoft SQL Server 2005 - December, 2008* at the following Microsoft address:

http://www.microsoft.com/downloads/details.aspx?FamilyID=536fd7d5-013f-49bc-9fc7-77dede4bb075&displaylang=en

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IMPORTANT: Click the **Download** button; do <u>not</u> download via the hyperlink on the *Feature Pack* page.

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2 Run the executable to install the files on the database server.

3 Reboot the database server.

File modification required for SQL Server 2005

The following steps must be performed by customers with a <u>SQL Server 2005</u> environment before you can edit your DTS packages.

Note: The following information contains steps to modify a file on your HBI database server. It is essential that you back up the file before you modify it.

---

1 Navigate to the location shown below:

x:\Program Files(X86)\Microsoft SQL Server\90\Tools\Bin\VSShell\Common7\IDE folder

(*where x represents the drive letter where SQL Server 2005 is installed.*)

2. In the IDE folder, locate the **Sqlwb.exe.manifest** file and open it in Notepad or other text editor.
3. Remove the lines of code shown below from the **Sqlwb.exe.manifest** file.

```
<dependency>
<dependentAssembly>
<assemblyIdentity type="win32" name="Microsoft.Windows.Common-
 Controls" version="6.0.0.0" processorArchitecture="x86"
 publicKeyToken="6595b64144ccf1df" language="*"></assemblyIdentity>
</dependentAssembly>
</dependency>
```

4. Save the changes to the file and exit the text editor.

You can now open the DTS package(s) in SQL Server 2005 and make your modifications.

Exisiting scheduled jobs for DTS packages

Customers migrating DTS packages to a new Microsoft SQL Server 2005 environment should note that scheduled jobs for DTS packages that were created and saved in SQL Server 2000 still exist.

These jobs will run as previously scheduled. You do not need to recreate these scheduled jobs.