cxView User's Manual

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IBM Tealeaf cxView User's Manual

IBM® Tealeaf® cxView User's Manual provides information on creating and managing business process scorecards, KPI scorecards, and dashboards.

cxView product overview

IBM Tealeaf cxView enhances the IBM Tealeaf cxImpact portal with scorecards and dashboards. These features serve as entry points for drill-down into session and visitor data for further analysis. Scorecards and dashboards can be configured through the Tealeaf Portal.

cxView enables you to proactively manage your online channel by providing an early warning system into customer struggle and the ability to understand why customers complete or abandon online processes. By providing real-time awareness into critical customer experience metrics, struggle scores and Key Performance Indicator (KPIs), as well as the ability to drill-down from these metrics to understand the causes of business-process abandonment, Tealeaf cxView gives you actionable dashboards designed to expose the cost of customer struggle to your business. This insight can help you to optimize your site and increase customer success rates.

IBM Tealeaf cxView is a separately licensable component of the IBM Tealeaf CX system.

cxView features and benefits

IBM Tealeaf cxView provides many features and benefits.

IBM Tealeaf cxViewfeature highlights include:

- Real-time Top Movers reports track thousands of site and customer behaviors to automatically surface highest-impact struggle sources and other abnormalities.
- Business process and KPI scorecards automatically grade business processes, usability indicators and application health metrics against defined business goals.
- Executive dashboards display reports and scorecards in simple and viable management-level views.
- Packaged community-based templates allow you to accelerate the time-to-value of IBM Tealeaf Customer Experience Management (CEM) best practices for specific verticals.
- Scheduled HTML e-mail reports with daily, weekly, or monthly delivery options.

IBM Tealeaf cxView benefits include:

- Proactively managing your online channel using customer experience metrics, struggle scores and KPIs
- Gaining real-time awareness into the highest-impact struggle sources on your site
- Preserving and recovering revenue by effectively identifying obstacles that affect site success rates
- Aligning business and IT by properly prioritizing Web site issues for remediation based on business impact
- Providing simple and viable visibility to executive management and key stakeholders

cxView terminology

You may need to know some of the terminology associated with cxView.

The following is common terminology used in cxView:

- Scorecards enable you to track the health of key functional areas of your site. There are two types of scorecards, Business Process and KPI.
- Business Process Scorecards automatically measure and score overall success, abandonment and failure rates across and within each step of a critical online business process against defined goals.

- KPI Scorecards automatically measure and score the health of online business services based on customers' actual experiences.
- Dashboards are customizable and configurable, enabling a personalized reporting framework for IBM Tealeaf data.
- Scorecard permissions are used to restrict the viewing of a particular scorecard to specific Portal user groups. Selected user groups can see and select the scorecard on the Scorecard Report page.
- Top Movers reports act as an early warning system, leveraging algorithmic discovery to automatically surface your site's highest-impact sources of struggle so that you can quickly take action.
- Process grades are used to mark the overall rate of successful completion of a process. You can assign letter grades that are based on the percentage of sessions. It can be completed, abandoned, or failed in comparison to the total number of sessions that began the process.

cxView user administration

IBM Tealeaf cxView provides user permission controls to manage users and groups, which enables careful control over access to scorecards and dashboards.

User permissions and user group permissions can be configured, if you need more information see the *IBM Tealeaf cxImpact Administration Manual*.

Additionally, you can configure:

- Settings that apply specifically to scorecard and dashboard configuration and data retention
- Global settings that apply to all Tealeaf scorecards in the system

IBM Tealeaf documentation and help

IBM Tealeaf provides documentation and help for users, developers, and administrators.

Viewing product documentation

All IBM Tealeaf product documentation is available at the following website:

Tealeaf Customer Experience Support

Use the information in the following table to view the product documentation for IBM Tealeaf:

Table 1. Getting help

To view...	**Do this...**
Product documentation	On the IBM Tealeaf portal, go to **?** > **Product Documentation**.
IBM Tealeaf Knowledge Center	On the IBM Tealeaf portal, go to **?** > **Product Documentation** and select *IBM Tealeaf Customer Experience in the ExperienceOne Knowledge Center*.
Help for a page on the IBM Tealeaf Portal	On the IBM Tealeaf portal, go to **?** > **Help for This Page**.
Help for IBM Tealeaf CX PCA	On the IBM Tealeaf CX PCA web interface, select **Guide** to access the *IBM Tealeaf CX PCA Manual*.

Available documents for IBM Tealeaf products

The following table is a list of available documents for all IBM Tealeaf products:

Table 2. Available documentation for IBM Tealeaf products	
IBM Tealeaf products	**Available documents**
IBM Tealeaf CX	• *IBM Tealeaf Customer Experience Overview Guide* • *IBM Tealeaf CX Client Framework Data Integration Guide* • *IBM Tealeaf CX Configuration Manual* • *IBM Tealeaf CX Cookie Injector Manual* • *IBM Tealeaf CX Databases Guide* • *IBM Tealeaf CX Event Manager Manual* • *IBM Tealeaf CX Glossary* • *IBM Tealeaf CX Installation Manual* • *IBM Tealeaf CX PCA Manual* • *IBM Tealeaf CX PCA Release Notes*
IBM Tealeaf CX	• *IBM Tealeaf CX RealiTea Viewer Client Side Capture Manual* • *IBM Tealeaf CX RealiTea Viewer User Manual* • *IBM Tealeaf CX Release Notes* • *IBM Tealeaf CX Release Upgrade Manual* • *IBM Tealeaf CX Support Troubleshooting FAQ* • *IBM Tealeaf CX Troubleshooting Guide* • *IBM Tealeaf CX UI Capture j2 Guide* • *IBM Tealeaf CX UI Capture j2 Release Notes*
IBM Tealeaf cxImpact	• *IBM Tealeaf cxImpact Administration Manual* • *IBM Tealeaf cxImpact User Manual* • *IBM Tealeaf cxImpact Reporting Guide*
IBM Tealeaf cxConnect	• *IBM Tealeaf cxConnect for Data Analysis Administration Manual* • *IBM Tealeaf cxConnect for Voice of Customer Administration Manual* • *IBM Tealeaf cxConnect for Web Analytics Administration Manual*
IBM Tealeaf cxOverstat	*IBM Tealeaf cxOverstat User Manual*
IBM Tealeaf cxReveal	• *IBM Tealeaf cxReveal Administration Manual* • *IBM Tealeaf cxReveal API Guide* • *IBM Tealeaf cxReveal User Manual*
IBM Tealeaf cxVerify	• *IBM Tealeaf cxVerify Installation Guide* • *IBM Tealeaf cxVerify User's Guide*
IBM Tealeaf cxView	*IBM Tealeaf cxView User's Guide*

Table 2. Available documentation for IBM Tealeaf products (continued)	
IBM Tealeaf products	**Available documents**
IBM Tealeaf CX Mobile	• *IBM Tealeaf CX Mobile Android Logging Framework Guide* • *IBM Tealeaf Android Logging Framework Release Notes* • *IBM Tealeaf CX Mobile Administration Manual* • *IBM Tealeaf CX Mobile User Manual* • *IBM Tealeaf CX Mobile iOS Logging Framework Guide* • *IBM Tealeaf iOS Logging Framework Release Notes*

cxView business process scorecards

Business Process Scorecards automatically measure and score overall success, abandonment and failure rates across and within each step of a critical online business process against defined goals.

Business process scorecards overview

Business Process scorecards are used to review business process events.

The Process scorecard summary displays the counts for the selected process:

- Starts
- Completions
- Abandonments
- Failures

If abandonment and failure events are configured, the appropriate percentages are displayed on the Success Rate Indicators graph. The grades for each process are displayed with the associated rating. The counts for each individual step are displayed, along with the conversion rate from the previous step.

The grades for each process are displayed with the associated rating. The counts for each individual step are displayed, along with the conversion rate from the previous step.

You can:

- View Business Process scorecards
- Create new Business Process scorecards
- Edit existing Business Process scorecards
- Delete existing Business Process scorecards
- Export existing Business Process scorecards
- Export existing Business Process scorecards as report on a schedule

You must have permission to perform any tasks associated with Business Process scorecards.

A process scorecard is based on defined steps for processes on your site. A typical example is the checkout process for a retail site, in which each step is monitored by a pre-defined Tealeaf event. For each step, absolute numbers of visitors are counted, and a conversion rate is calculated. A grade can be associated with the conversion rate.

Business process scorecard terminology

Term
Definition

Abandon Step
An event or a set of events that represents abandonment of a business process by the visitor. For example, a request from the visitor's web browser for the **Order Canceled** page signifies the abandonment of an order placement process.

Availability
Measure of the percentage of all occurrences of a functional unit usage on the website when it responded normally. Timeouts, missing pages, and other errors render a web application less than 100 percent available to its users.

Business Process
A coherent unit of a workflow that is meaningful in a business sense. Examples include placing an order for products at an online shopping site or registering for a new user account at an online banking site.

Comparison Period
The time period that provides the baseline scorecard to which the focus period's scorecard is compared.
If the comparison feature is enabled, the scorecard for the focus period is compared to the scorecard generated from data for the comparison period.

Failure Events
You can define one or more Failure events, which you can use to track failures at individual steps in the process. These failures might be status code errors or error messages that are presented to the visitor through the application. To avoid double-counting, no step should occur more than once in the process.

Failure Step
An event or set of events that represent the failure of a business process. For example, the appearance of an HTTP 500 (internal server error) page signifies failure of a business process.

Focus Period
The time period that is the principal focus of the scorecard currently being viewed.

Negative Comparison
For the purposes of rating and grading, negative comparison means that lower numerical percentage values are for specific quantity result in a higher scorecard letter grade. This comparison is useful when the rated indicator is undesirable, such as the frequency of occurrence of an HTTP error status code.

Overall Abandonment Event
Each business process can have one event that signifies that the visitor abandoned the process. If defined, the overall Abandonment event is used to calculate the Abandonment grade. If it is not defined, the total of the individual Abandonment events is used instead.

- Abandonment means that the visitor stopped work on completing the process to either explore elsewhere on your website or to go to another website.
- If wanted, you can configure the scorecard to automatically calculate abandonment rates for you in the General tab.

Overall Failure Event
Each business process can have one event that signifies that the visitor failed to complete the process. If defined, the overall Failure event is used to calculate the Failure grade. If it is not defined, the total of the individual Failure events is used instead. Failure means that the visitor tried to complete the process but failed because of a workflow or technical issue.

Positive Comparison
For the purposes of rating and grading, positive comparison means that higher numerical percentage values for specific quantity result in a higher scorecard letter grade.

Process Steps

The sequence of steps that is defining the required flow through a business process. For example, the process of placing an order for products includes steps to specify the kinds and quantities of products to order. It also includes customer's identification and shipping address, and payment method information.

Process Grades

Process grades are used to mark the overall rate of successful completion of a process. You can assign letter grades that are based on the percentage of sessions. It can be completed, abandoned, or failed in comparison to the total number of sessions that began the process.

Step Abandonment Events

You can define one or more Step Abandonment events, which you can use to track abandonment at individual steps in the process. To avoid double-counting, no step must occur more than one time in the process. If wanted, you can configure the scorecard to automatically calculate abandonment rates.

Scorecard toolbar

The scorecard toolbar has many icons that you should become familiar with.

Figure 1. Scorecard toolbar

Table 3. Scorecard toolbar

Icon	Command	Description
04/05/2010	Date Selector	Select a current focus date range and optionally a comparison date range for the scorecard.
	Open	Open a selected scorecard.
	Schedule Snapshot	Schedule a snapshot of the scorecard for delivery to selected recipients through email.
	Export Report	Export the currently configured scorecard to Excel or PDF.
	Add to Dashboard	Add the current scorecard to a selected dashboard tab.
Period: Day	Period	Select the period for the scorecard, which determines what data period to use for the aggregated data: counts in daily, weekly, monthly, or quarterly periods. Based on this selection, the calendar selects ranges of the appropriate size.

Business process scorecard field definitions

If you need more information about populating fields while working with Business Process scorecards, you can find them here.

General field names and field definitions

This list contains the field names and field definitions for the General tab:

- **Title** - The title of the scorecard.

- **Report Group** - By default, a newly created scorecard is assigned to the No Dimension Report Group report group. If the scorecard is configured to use the No Dimension Report Group report group, then no additional dimension filtration can be applied on the report, since all events share this report group by default.
- **Dimension** - If the scorecard is configured to use the No Dimension Report Group report group, then no additional dimension filtration can be applied on the report, since all events share this report group by default.
- **Automatically Calculate Abandonment** - Sets the scorecard to calculate abandonment based on the difference in step counts (step 2 vs step 1).

Permissions field names and field definitions

This list contains the field names and field definitions for the Permissions tab:

- **Title** - The title of the scorecard.
- **Base Activity** - Denominator used for KPI scorecard calculations.
- **Goal** - Displays the purpose only, the desired score percentage for the metric.
- **Events** - List of events.
- **View Alias** - Each event can be given a user friendly alias for display purposes, used instead of the actual event name.

Scorecard scheduling field definitions

If you need more information about populating fields while scheduling scorecards, you can find them here.

General field names and field definitions

This list contains the field names and field definitions for the General tab:

- **Active** - Click the check box to enable the scorecard schedule.
- **Description** - This description is displayed in the Portal.
- **Schedule** - Schedule the scorecard by type:
  - **Daily**- Select the days of the week when you want to run a scorecard.
  - **Weekly**- Select the single day of the week when you want to run a scorecard.
  - **Monthly** - From the drop-down, select the day of the month when you want to run a scorecard.
- **Send At** - Select the time when you want to run and deliver a scorecard. Time is based on the Tealeaf system time zone.
- **Period** - Select the time period. This selection defines the period to use for the aggregated data, which forces the calendar to select ranges of the appropriate size. The scorecard is updated to display report data for the relevant period. Choose from:
  - Day
  - Week - For reporting purposes, the beginning of the week is defined as Sunday.
  - Month
  - Quarter - The beginning of each quarter is January, April, July, and October.
- **Focus Day Offset** - Optionally, you can configure the number of days before the date of execution that you would like to define as "today" in the scorecard. For example, you might configure a scorecard to be run Tuesday morning to delivers Monday's data to users. In this case, you would set the offset value to 1.
- **Language** - Select the language to use in the scorecard from the drop-down.
- **Recipients** - Enter a comma-separated list of email addresses or aliases to whom to send the scorecard.
- **Scorecard** - Click the link to select the scorecard to send. Select the scorecard and click Select.

- **Data Interval** - Select the scorecard with reporting period from the drop-down list. The period is defined relative to the date of the scorecard execution, factoring the **Focus Date Offset**. For example, a scorecard that runs on Sunday evening with an offset of three days with a **Date Period of Week** delivers scorecard data from the previous Thursday back to the Thursday before it.
- **Compare** - Click this check box to include the preceding Data Interval in the report.
- **Email Format** - Select the format in which to send the dashboard: PDF, HTML, or Excel-readable XML (Excel (XML)).

History field names and field definitions

This list contains the field names and field definitions for the History tab:

- **Created At** - Time stamp for when the schedule was created.
- **Scheduled At** - Time stamp for next execution of the schedule.
- **Log Level** - Success or failure of the scheduled report.
- **Message** - Detail message on status of report execution.

Business process scorecards management

You can view, create, edit and delete business process scorecards.

You can:

- View scorecards
- Create new scorecards
- Edit existing scorecards
- Delete existing scorecards
- Export existing scorecards as a report
- Export existing scorecards as a report on a schedule
- Purge existing scorecard data

You must have permission to perform any tasks associated with scorecards.

Viewing business process scorecards

You can view business process scorecards. You can view all scorecards that you create or that are shared to you. If you can not find a shared scorecard, contact your administrator or the creator of the scorecard.

Procedure

1. In the Tealeaf Portal menu, select **Analyze** > **Scorecards**.
2. Expand **Scorecards**.
3. Select the Business Process scorecard to view.
4. Click **Select**. The Business Process scorecard is displayed.
5. Optional. If you want to view scorecard data across multiple dates:
   - Update the **Start Date**
   - Update the **End Date**
   - Click **Apply**
6. Optional. If you want to compare scorecard data:
   - Update the **Start Date**
   - Update the **End Date**
   - Select the **Compare to Date Range** check box
   - Enter the dates to compare
   - Click **Apply**

7. Optional. If you want to change the **Period**, select either **Day**, **Week**, **Month** or **Quarter**.

Creating business process scorecards

You can create new Business Process scorecards.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Scorecards**.
2. In the Configuration pane, click **Process Scorecards**. The list of available Business Process scorecards is displayed.
3. Click the **+** icon.

   The Process Scorecard is displayed. There are four tabs displayed, **General**, **Events**, **Grades**, and **Permissions**.
4. Enter a **Title** for the new Business Process Scorecard.
5. Select the **Events** tab.
6. Configure the process steps.

   Select the process steps and events and complete the steps for the event:

   - **Process Steps** - You must configure at least two process steps.
   - **Overall Abandonment Event**
   - **Step Abandonment Events**
   - **Overall Failure Event**
   - **Failure Events**
7. Select the **Grades** tab.
8. Select **Completion**, **Abandonment**, and **Failure** and review the grades for each event.
9. Select the **Permissions** tab.
10. Review the **User Groups** that have permission to view and edit this scorecard. Make any changes that are needed.
11. Click **Save**.

    The new Business Process scorecard is created.

Editing business process scorecards

You can edit Business process scorecards. You must have permission to edit.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Scorecards**.
2. In the Configuration pane, click **Process Scorecards**. The list of available Business Process scorecards is displayed.
3. Select the business process score that you want to edit.
4. Click **Edit**.

   The Business Process scorecard data is displayed.
5. Update the fields in any of the tabs.
6. Click **Save**.

Deleting business process scorecards

You can delete Business Process scorecards. You must have permission to delete.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Scorecards**.
2. In the **Configuration** pane, click **Scorecards**. The list of available Business Process scorecards is displayed.

3. Select the Business Process scorecard that you want to delete.
4. Click **Delete**.
5. Confirm that you want to delete the scorecard. Click **OK**.

   The Business Process scorecard is deleted.

Exporting business process scorecards as a report

After you create business process scorecards, you can create scorecard reports based what is currently displayed in the browser. The scorecard reports can be downloaded or emailed.

Procedure

1. In the Tealeaf Portal menu, select **Analyze** > **Scorecards**.
2. Click the **Open** icon.

   The **Scorecard Selector** is displayed.
3. Expand **Scorecards**.
4. Select the scorecard.
5. Click **Export Report**.
6. Select either **Excel**, **PDF** or **Email**.
   - For Excel, you can download or save the file.
   - For PDF, you can download or save the file
   - For Email, you need to select either **PDF**, **Excel**, or **HTML** and then enter a **Message** and enter **Recipients**. Click **Send**.

Exporting scorecards as a report on a schedule

After you create KPI or Business process scorecards, you can create scorecard reports based on a schedule. These scorecard reports are delivered to specific email addresses as Excel, PDF, or HTML based on the schedule.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Scorecards**.
2. Click **Scorecard Schedules**.
3. Click <**Create Schedule**>.

   The **General** tab is displayed.
4. Select the **Scheduling** data.
   - **Daily**, **Weekly**, or **Monthly**
   - **Send At**
   - **Focus Day Offset**
   - **Language**
5. Select the **Options**.
   - <**Select a scorecard**> - click this and then select a scorecard from the list displayed and click **Select**. This can be a KPI scorecard or a Business Process scorecard.
   - **Tabs**
   - **Email Format**
6. Enter the email address for the **Recipients**.
   - **To:**
   - **Cc:**
   - **Bcc:**
7. Click **Save**.

A message is displayed which states the schedule was successfully saved. The schedule is listed in the **Scorecard Schedules** pane.

Purging business process scorecard data

If needed, you can purge data for individual business process scorecards.

About this task

Purging scorecard data permanently deletes data specific to the selected scorecard. Scorecard data is stored separately from base IBM Tealeaf cxImpact data, which is unaffected by this operation.

If a fact is used by multiple scorecards, its count data is not purged. If the fact is used only for the selected scorecard, all data that is associated with it is removed.

You can repopulate the scorecard by purging the scorecard data. Set the Aggregation Date to an earlier date after you purge the data. This action forces the reaggregation of all scorecard data that begins with that date.

If you do not repopulate the scorecard, data is accumulated in the scorecard from the time when its data was purged onward.

Procedure

1. In the Tealeaf Portal menu, select **Analyze** > **Scorecards**.
2. Select **Data Management**.
3. Click **Purge Data**.
4. Click **<Select a Scorecard>**.
5. Select the business process scorecard and click **Select**.
6. To permanently delete the data for the selected scorecard, click **Purge Data**.
7. Confirm the deletion.

   The data is purged.

Rolling back scorecards aggregation dates

If scorecard definition changes must be applied retroactively, you can use the rollback feature to apply the changes.

About this task

Suppose that you change your scorecard definition and must populate the changed scorecard data retroactively. If the latest Aggregation Date for a specific interval is rolled back, then scorecard data is reaggregated from the date forward, across all intervals.

- Depending on the number of scorecards in your Tealeaf solution, rolling back the scorecard aggregation date can be expensive in terms of processing resources. Tealeaf recommends performing this rollback at an off-peak time.
- Rolling back the scorecard date also performs reaggregations for any full weekly or monthly intervals that occur between the previous aggregation date and the new one. For example, if you set the scorecard date back 32 days, 32 daily aggregations, 4 weekly aggregations, and one monthly aggregation are performed.
- Before you roll back the scorecard date, you must verify that the Scorecard tables contain data for all intervals that are reaggregated. For example, if your Scorecard tables contain only six days of data. Now, setting the scorecard date back 32 days results in all weekly and monthly aggregations to be based on empty data.
- After the scorecard date is reset, when the scorecard data for that interval is next processed, Tealeaf effectively recalculates the scorecard data from that date forward. After a scorecard definition is changed by adding or removing events, previously calculated data becomes invalid.

Procedure

1. Select **Configure** > **Scorecards** from the Tealeaf Portal menu.
   The Scorecard Configuration page is displayed.
2. Click the **Data Management** link.
3. Click **Aggregation Dates**.
   The dates of the most recent scorecard aggregation runs are displayed in the right panel.
4. Set the new **Date**.
5. Click **Save**.

Business process examples

Use these examples to help understand a scenario for creating business process in cxView.

Business process example: creating a business process

In this example, you want to define a commonly encountered business process: order placement. In this example, the business process is defined as follows

Process Steps for this example

Procedure

1. The beginning of the order placement process is defined as the moment when the visitors first add an item to their shopping basket. It also includes retrieval of a previously saved shopping basket.
2. The next major step of the process is when the visitor begins the order submission sequence by clicking **Checkout**.
3. On the next page, the visitor provides shipping and payment information.
4. Following that is the final order inspection/submission page.
   - If the visitor clicks **Submit Order** here, the order confirmation page is presented.
   - If the **Cancel Order** button is clicked instead, the order cancellation page is presented.
5. Finally, if the **Continue Shopping** button is clicked, the visitor is returned to the site's home page and can continue to shop for more items.

Results

If order confirmation page or order cancellation page is displayed after order inspection/submission page, then it marks the end of this business process.

Note: Order cancellation page or any other failure to reach the order confirmation page after you begin the ordering process represents abandonment of this business process.

Business process example: processing web pages

The ordering business process in our example website consists of the following sequence of pages. They pages are listed in the example.

Procedure

1. Beginning of the business process, either of the:
   a) Add item to shopping basket: `/addtobasket.jsp`. This step can occur multiple times, with visits to other pages in the site.
      For example, product search or browsing pages, other products' detail pages interspersed.
   b) Retrieve previously saved shopping basket: `/getsavedbasket.jsp`.
2. Checkout page: `/checkout.jsp`.
3. Shipping and payment information entry page: `/shipping.jsp`.
4. Order inspection and submission page: `/confirm.jsp`.

5. End of this business process through either of the following pages:
   - **Order confirmation** page: `/ordercompleted.jsp`.
   - **Order canceled** page: `/ordercanceled.jsp`.

Results

Presentation of the order canceled page or any other failure to reach the order confirmation page, represents abandonment of this business process.

- Saving a basket through `/savebasket.jsp` or continuing to shop for more items after the order inspection/submission page is presented does not constitute an abandonment. These events are postponement of completion of the ordering process.
- Special handling is required for orders that are saved during a session but never submitted during that session. It can be necessary to define two slightly different business processes account for saving a shopping basket.

Tealeaf users can decide whether they are interested in just the workflow of submitting an order or it is friendly and usable, regardless of beginning of the order.

Business process example: checkout process scorecard
You can define per-hit events to detect the URLs listed and assign them to the sections of the scorecard.

You can create events by using the pre-configured pattern to match the URL, setting the condition of each event to be one of following file names listed. If you need more information on configuring events, see the *IBM Tealeaf CX Event Manager Manual*.

Process Steps: The sequence of steps in the process is defined by events that detect the following URLs, occurring in this order:

- `/addtobasket.jsp OR /getsavedbasket.jsp`
- `/checkout.jsp`
- `/shipping.jsp`
- `/confirm.jsp`
- `/ordercompleted.jsp`

Abandonment Step: `/ordercanceled.jsp`

Failure Step: Define the failure step to be a compound event by using as conditions the output of all error events that can apply to the process pages. These conditions must be configured to a logical OR evaluation.

Business process example: checkout process scorecard with advanced abandonment
This business process example creates a more sophisticated measure of abandonment.

You can define the following events that are listed and assign them to the sections of the scorecard definition.

Process Steps: The sequence of steps in the process is defined by events that detect the following URLs and evaluation to `true` if they are present.

- `/checkout.jsp`
- `/shipping.jsp`
- `/confirm.jsp`
- `/ordercompleted.jsp`

Abandonment Step: Create an event with an `End of Session` trigger that evaluates all of the following things:

- `/checkout.jsp OR /shipping.jsp OR /confirm.jsp`
- `NOT /ordercompleted.jsp`

- NOT the failure step event (next step)

Failure Step: Create an event with an End of Session trigger that evaluates all of the following things:

- /shipping.jsp AND /confirm.jsp, NOT /ordercompleted.jsp

Business process example: new user registration
The following process scorecard definition can be used as a template for measuring the process for registering a new user.

You can defined the new user registration business process in three simple steps:

- /registernewuser.jsp
- /registrationcompleted.jsp
  - If the registration is successful, a message is included in the response:

```
Thank you for registering.
```

Define the events that are listed and assign them to the sections of the scorecard definition as shown.

Process Steps: The sequence of steps in the process is defined by events that detect the following URLs.

- /registernewuser.jsp
- /registrationcompleted.jsp

Abandonment Step: Create an event with an End of Session trigger that evaluates all of the following things:

- /registernewuser.jsp
- NOT response contains the phrase "Thank you for registering."

Business process example: insurance policy purchase
The following business process scorecard definition monitors a simple transaction to purchase an insurance policy.

You can define the following events and assign them to the sections of the scorecard definition as shown.

Process Steps: The sequence of steps in the process is defined by events that detect the following pages of the application.

- Policy Holder Information
- Insured Party Details
- Review
- Notices
- Payment Information
- Payment Method
- Confirmation
- Policy Welcome

Abandonment Step: Create an End of Session event that is composed of events 1 AND NOT 8 AND NOT 6.

Failure Step: Create an End of Session event that is composed of Events 1 AND 7 AND Global Error Page AND NOT 8.

cxView KPI scorecards

KPI scorecards measure key performance indicators and score the health of online business services that are based on visitors' actual experiences.

KPI scorecards overview

KPI scorecards are used to measure the relationship between event counts and a baseline count. These counts include the number of sessions, number of page views, or another event count. Each KPI scorecard can have any number of individual defined KPIs, each containing a list of events to report, their grades, and the base count.

KPI scorecards typically show how values or ratios are comparing to your site's predefined scoring model. For example, values such as the number of page views or ratios such as conversion rates can be represented in chart form. Ratios such as conversion rates across time can be displayed in pie charts, bar charts, and other representations.

You can:

- View KPI scorecards
- Create new KPI scorecards
- Edit existing KPI scorecards
- Delete existing KPI scorecards
- Export existing KPI scorecards as a report
- Export existing KPI scorecards as a report on a schedule
- Purge KPI scorecard data

You must have permission to perform any tasks associated with KPI scorecards.

KPI scorecard terminology

These terms pertain to key performance indicator (KPI) scorecards.

Term
Definition

Activity Indicator
An indicator of the general activity or traffic on a web application regardless of success, failure, or availability. It can be the total number of web application sessions, hits, or the count of a particular Canister event. It is used as the denominator in KPI percentage rating calculations.

Availability Indicator
An event that indicates either that the system is available or unavailable. The count of HTTP responses whose HTTP status code is 200 (success) indicates availability, while HTTP 500 (internal server error) is an indicator of non-availability.

Grades
When the ratio for the scorecard falls within a configured range, it is assigned a grade A-F.

Permissions
User access permissions for the scorecard.

Scorecard toolbar

The scorecard toolbar has many icons that you should become familiar with.

Figure 2. Scorecard toolbar

Table 4. Scorecard toolbar		
Icon	**Command**	**Description**
04/05/2010	Date Selector	Select a current focus date range and optionally a comparison date range for the scorecard.
	Open	Open a selected scorecard.
	Schedule Snapshot	Schedule a snapshot of the scorecard for delivery to selected recipients through email.
	Export Report	Export the currently configured scorecard to Excel or PDF.
	Add to Dashboard	Add the current scorecard to a selected dashboard tab.
Period: Day	Period	Select the period for the scorecard, which determines what data period to use for the aggregated data: counts in daily, weekly, monthly, or quarterly periods. Based on this selection, the calendar selects ranges of the appropriate size.

What is a weighted KPI calculations

For weighted KPI calculations, the base weight of each KPI is factored against the weighted counts of each KPI by using the following formulas.

Here are the formulas:

```
base weight = 100% / # of KPI events
```

The weighted count is calculated by using the user-defined weights as a ratio to the base weight, as in the following formula:

```
weighted count= event count * (event weight / base weight)
```

The rating for each KPI event is then calculated as follows:

```
grade rating = sum of weighted counts / base activity count
```

In the table below, each row represents the KPI calculation for each type of Summary Calculation for the Weighted values. In the previous example, the count for Event5 is set to `0`, which factors into the following average calculations.

Table 5. Weighted KPI Calculations			
Summary Calculation Type	Value	Formula	Grade Rating
`Total`	38	Sum of ((Count of Event) * (Weighted/Unweighted)) for all event types	76.00%

Table 5. Weighted KPI Calculations (continued)			
`Average Including 0`	7.6	(Value of `Total` / #Events (5))	15.20%
`Average Excluding 0`	9.5	(Value of `Total`) / 4) • Excludes Event5	19.00%

What is an unweighted KPI calculations
In the following table, each row represents the KPI calculation for each type of Summary Calculation for the unweighted values.

- In the preceding table, the count for Event5 is set to `0`, which factors into the average calculations.
- Grade Rating is computed by the following formula. Grades are assigned by comparing this Grade Rating to the Grade buckets.

```
Value / Base Activity
```

Table 6. Unweighted KPI Calculations			
Summary Calculation Type	Value	Formula	Grade Rating
`Total`	28	Count of Event1 + Count of Event2 + Count of Event3 + Count of Event4 + Count of Event5	56.00%
`Average Including 0`	5.6	(Value of `Total` / #Events (5))	11.20%
`Average Excluding 0`	7	(Value of `Total`) / 4) • Excludes Event5	14.00%

Example: Event counts and weighting in KPI scorecards
In the following table, you can see how event counts and weights are related.

For our example of five events, you can see the Event Counts for each event for the time period.

If no weights are assigned for the selected events, the unweighted percentage is calculated by the following formula for each event:

```
1 / (Number of events)
```

In our example, this calculation is 1/5 or 20% for each type of event.

In the Weighted column , example weights are applied for each event. These weights are as part of creating the KPI scorecard.

Note: The sum of all weights for the KPI must equal `100`.

Table 7. Event Counts and Weighting			
Event ID	Event Count	Unweighted	Weighted

Table 7. Event Counts and Weighting (continued)			
Event1	10	20%	50%
Event2	8	20%	20%
Event3	6	20%	10%
Event4	4	20%	10%
Event5	0	20%	10%

KPI scorecard field definitions
If you need more information about populating fields while working with KPI scorecards, you can find them here.

General field names and field definitions

This list contains the field names and field definitions for the General tab:

- **Title** - The title of the KPI.
- **Report Group** - By default, a newly created scorecard is assigned to the No Dimension Report Group report group. If the scorecard is configured to use the No Dimension Report Group report group, then no additional dimension filtration can be applied on the report, since all events share this report group by default.
- **Dimension** - If the scorecard is configured to use the No Dimension Report Group report group, then no additional dimension filtration can be applied on the report, since all events share this report group by default.
- **Active** - Indicated whether the scorecard is active.

KPIs field names and field definitions

This list contains the field names and field definitions for the KPIs tab:

- **Title** - The title of the KPI.
- **Base Activity** - The denominator for the KPI events. This number is compared to the values of the KPI events. It must have a count greater than or equal to the sum of the KPI event counts. The rating for the KPI is the sum of the KPIs event counts divided by the base activity count:
  - Event - The event to count as the denominator for the KPI.
  - To stop your event activity of session or pages counts, use the **Session Count** or **Hit Count** event as the base activity in the denominator. These events must be configured in the **General** tab to share report group same as the scorecard itself.
- **Comparison to Previous** - This property identifies how to mark rating changes when you compare KPI scorecards for different time periods:
  - **Increase is preferable** - If the current rating is higher than the previous rating, it is marked with a green Up Arrow. Decreases are marked with a red Down Arrow. Desirable events such as purchase events must be marked in this manner.
  - **Decrease is preferabl**e - If the current rating is lower than the previous rating, it is marked with a green Down Arrow. Increases are marked with a red Up Arrow. Undesirable events such as abandonment events must be marked in this manner.
- **Summary Calculation** - This property defines how the KPI events are summarized when you view KPI details:
  - **Total** - The sum of the event percentages is displayed
  - **Average (including zero values)** - The average of the event percentages are displayed, including counts of 0.

  - **Average (excluding zero values)** - The average of the event percentages are displayed, omitting counts of 0.
- **Goal** - The visible goal for the KPI has no effect on the rating and is used to compare against the actual rating on the scorecard report.
- **Grades** - KPI grades are used to mark the overall completion rate of a process. The percentages are used to compare against the rating for the KPI. If increases are preferable for the KPI, the grades range from 100% to 0%; if negative, they range from 0% to 100%. The grades that themselves are displayed on the scorecard report.
- **Rating** - Numerical ratio which is underlying the letter grade: KPI indicator count divided by activity indicator count.
- **Change** - If there is a comparison period that is shown, the change between the comparison period and the focus period is shown.
  - A green upward-pointing or red downward-pointing arrow is displayed corresponding to positive or negative change.
  - The numerical difference between the rating of the focus period and that of the comparison period is also displayed.
- **Events** - Configured events are listed here.
- **Event Count** - The absolute count of occurrences of the indicator event.
- **% Activity** - The percentage of the count of the Base Activity event for the KPI.
- **View Alias** - To toggle the display of aliases in the scorecard configuration page, check this box.

Scorecard scheduling field definitions
If you need more information about populating fields while scheduling scorecards, you can find them here.

General field names and field definitions

This list contains the field names and field definitions for the General tab:

- **Active** - Click the check box to enable the scorecard schedule.
- **Description** - This description is displayed in the Portal.
- **Schedule** - Schedule the scorecard by type:
  - **Daily**- Select the days of the week when you want to run a scorecard.
  - **Weekly**- Select the single day of the week when you want to run a scorecard.
  - **Monthly** - From the drop-down, select the day of the month when you want to run a scorecard.
- **Send At** - Select the time when you want to run and deliver a scorecard. Time is based on the Tealeaf system time zone.
- **Period** - Select the time period. This selection defines the period to use for the aggregated data, which forces the calendar to select ranges of the appropriate size. The scorecard is updated to display report data for the relevant period. Choose from:
  - Day
  - Week - For reporting purposes, the beginning of the week is defined as Sunday.
  - Month
  - Quarter - The beginning of each quarter is January, April, July, and October.
- **Focus Day Offset** - Optionally, you can configure the number of days before the date of execution that you would like to define as "today" in the scorecard. For example, you might configure a scorecard to be run Tuesday morning to delivers Monday's data to users. In this case, you would set the offset value to 1.
- **Language** - Select the language to use in the scorecard from the drop-down.

- **Recipients** - Enter a comma-separated list of email addresses or aliases to whom to send the scorecard.
- **Scorecard** - Click the link to select the scorecard to send. Select the scorecard and click Select.
- **Data Interval** - Select the scorecard with reporting period from the drop-down list. The period is defined relative to the date of the scorecard execution, factoring the **Focus Date Offset**. For example, a scorecard that runs on Sunday evening with an offset of three days with a **Date Period of Week** delivers scorecard data from the previous Thursday back to the Thursday before it.
- **Compare** - Click this check box to include the preceding Data Interval in the report.
- **Email Format** - Select the format in which to send the dashboard: PDF, HTML, or Excel-readable XML (Excel (XML)).

History field names and field definitions

This list contains the field names and field definitions for the History tab:

- **Created At** - Time stamp for when the schedule was created.
- **Scheduled At** - Time stamp for next execution of the schedule.
- **Log Level** - Success or failure of the scheduled report.
- **Message** - Detail message on status of report execution.

KPI scorecards management

You can view, create, edit and delete KPI scorecards.

You can:

- View KPI scorecards
- Create new KPI scorecards
- Edit existing KPI scorecards
- Delete existing KPI scorecards
- Export existing KPI scorecards as a report
- Export existing KPI scorecards as a report on a schedule
- Purge existing KPI scorecard data

You must have permission to perform any tasks associated with KPI scorecards.

Viewing KPI scorecards

You can view KPI scorecards.

Procedure

1. In the Tealeaf Portal menu, select **Analyze** > **Scorecards**.
2. Click the **Open** icon.
   The **Scorecard Selector** is displayed.
3. Expand **KPI Scorecards**.
4. Select the KPI scorecard to view.
5. Click **Select**. The scorecard is displayed.
6. Optional. If you want to view scorecard data across multiple dates:
   - Update the **Start Date**
   - Update the **End Date**
   - Click **Apply**
7. Optional. If you want to compare scorecard data:
   - Update the **Start Date**

- Update the **End Date**
- Select the **Compare to Date Range** check box
- Enter the dates to compare
- Click **Apply**

8. Optional. If you want to change the **Period**, select either **Day**, **Week**, **Month** or **Quarter**.

Creating KPI scorecards

You can create new KPI scorecards.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Scorecards**.
2. In the **Configuration** pane, click **KPI Scorecards**.
   The list of available KPI scorecards is displayed.
3. Click +.
   The KPI Scorecard is displayed. There are three tabs, **General**, **KPIs**, and **Permissions**. The **General** tab is displayed.
4. Enter a **Title** for the new Scorecard.
5. Select the **KPIs** tab.
6. Select **Create KPI**.
7. Enter the **Title**.
8. Click <**Select an event**> and then select an event from the **Event Selector**.
9. Select the **Comparison To Previous**.
10. Select the **Summary Calculation**.
11. Select the **Goal**.
12. Review and update **Grades**, if needed.
13. Select the **Permissions** tab.
14. Review the **User Groups** that have permission to view and edit this scorecard. Make any changes that are needed.
15. Click **Save**.
    The new KPI scorecard is created.

Editing KPI scorecards

You can edit KPI scorecards. You must have permissions to edit KPI scorecards.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Scorecards**.
2. In the **Configuration** panel, click **KPI Scorecards**. The list of available KPI scorecards is displayed.
3. Select the KPI scorecard to edit.
4. Click **Edit**.
   The KPI scorecard data is displayed.
5. Update the fields in any of the tabs.
6. Click **Save**.

Deleting KPI scorecards

You can delete KPI scorecards. You must have permission to delete KPI scorecards.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Scorecards**.
2. In the **Configuration** pane, click **KPI Scorecards**. The list of available KPI scorecards is displayed.

3. Select the KPI scorecard that you want to delete.
4. Click the **Delete** icon.
5. Confirm that you want to delete the scorecard. Click **OK**.

   The KPI scorecard is deleted.

Exporting KPI scorecards as a report

After you create scorecards, you can create scorecard reports based what is currently displayed in the browser. The scorecard reports can be downloaded or emailed.

Procedure

1. In the Tealeaf Portal menu, select **Analyze** > **Scorecards**.
2. Click the **Open** icon.

   The **Scorecard Selector** is displayed.
3. Expand **KPI Scorecards**.
4. Select the KPI scorecard.
5. Click **Export Report**.
6. Select either **Excel**, **PDF** or **Email**.
   - For Excel, you can download or save the file.
   - For PDF, you can download or save the file.
   - For Email, you need to select either **PDF**, **Excel**, or **HTML** and then enter a **Message** and enter **Recipients**. Click **Send**.

Exporting scorecards as a report on a schedule

After you create KPI or Business process scorecards, you can create scorecard reports based on a schedule. These scorecard reports are delivered to specific email addresses as Excel, PDF, or HTML based on the schedule.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Scorecards**.
2. Click **Scorecard Schedules**.
3. Click <**Create Schedule**>.

   The **General** tab is displayed.
4. Select the **Scheduling** data.
   - **Daily**, **Weekly**, or **Monthly**
   - **Send At**
   - **Focus Day Offset**
   - **Language**
5. Select the **Options**.
   - <**Select a scorecard**> - click this and then select a scorecard from the list displayed and click **Select**. This can be a KPI scorecard or a Business Process scorecard.
   - **Tabs**
   - **Email Format**
6. Enter the email address for the **Recipients**.
   - **To:**
   - **Cc:**
   - **Bcc:**
7. Click **Save**.

A message is displayed which states the schedule was successfully saved. The schedule is listed in the **Scorecard Schedules** pane.

Purging KPI scorecard data

If needed, you can purge data for individual KPI scorecards.

About this task

Purging scorecard data permanently deletes data specific to the selected scorecard. Scorecard data is stored separately from base IBM Tealeaf cxImpact data, which is unaffected by this operation.

If a fact is used by multiple scorecards, its count data is not purged. If the fact is used only for the selected scorecard, all data that is associated with it is removed.

You can repopulate the scorecard by purging the scorecard data. Set the Aggregation Date to an earlier date after you purge the data. This action forces the reaggregation of all scorecard data that begins with that date.

If you do not repopulate the scorecard, data is accumulated in the scorecard from the time when its data was purged onward.

Procedure

1. In the Tealeaf Portal menu, select **Analyze** > **Scorecards**.
2. Select **Data Management**.
3. Click **Purge Data**.
4. Click <**Select a Scorecard**>.
5. Select the KPI scorecard and click **Select** .
6. To permanently delete the data for the selected scorecard, click **Purge Data**.
7. Confirm the deletion.

   The data is purged.

Viewing scorecards aggregation dates

You can review the dates when scorecard data was last retrieved from the database and aggregated for use by individual scorecards.

Procedure

1. To begin, select **Configure** > **Scorecards** from the Tealeaf Portal menu.

   The Scorecard Configuration page is displayed.
2. Click the **Data Management** link.
3. Click **Aggregation Dates**.

   The dates of the most recent scorecard aggregation runs are displayed in the right panel.

Rolling back scorecards aggregation dates

If scorecard definition changes must be applied retroactively, you can use the rollback feature to apply the changes.

About this task

Suppose that you change your scorecard definition and must populate the changed scorecard data retroactively. If the latest Aggregation Date for a specific interval is rolled back, then scorecard data is reaggregated from the date forward, across all intervals.

- Depending on the number of scorecards in your Tealeaf solution, rolling back the scorecard aggregation date can be expensive in terms of processing resources. Tealeaf recommends performing this rollback at an off-peak time.

- Rolling back the scorecard date also performs reaggregations for any full weekly or monthly intervals that occur between the previous aggregation date and the new one. For example, if you set the scorecard date back 32 days, 32 daily aggregations, 4 weekly aggregations, and one monthly aggregation are performed.
- Before you roll back the scorecard date, you must verify that the Scorecard tables contain data for all intervals that are reaggregated. For example, if your Scorecard tables contain only six days of data. Now, setting the scorecard date back 32 days results in all weekly and monthly aggregations to be based on empty data.
- After the scorecard date is reset, when the scorecard data for that interval is next processed, Tealeaf effectively recalculates the scorecard data from that date forward. After a scorecard definition is changed by adding or removing events, previously calculated data becomes invalid.

Procedure

1. Select **Configure** > **Scorecards** from the Tealeaf Portal menu.
   The Scorecard Configuration page is displayed.
2. Click the **Data Management** link.
3. Click **Aggregation Dates**.
   The dates of the most recent scorecard aggregation runs are displayed in the right panel.
4. Set the new **Date**.
5. Click **Save**.

KPI examples

To better understand KPI, review the examples that are provided.

KPI scorecard events used retail shopping site

For the following examples, the list of events that are used in the scorecard definition is as follows.

The following events are based on Tealeaf request variables:

HTTP Status Code

- `HTTP 400 - Bad Request`
- `HTTP 401 - Unauthorized`
- `HTTP 402 - Payment Required`
- `HTTP 403 - Forbidden`
- `HTTP 404 - Not Found`
- `HTTP 405 - Method Not Allowed`
- `HTTP 500 - Internal Server Error`

HTTP USER AGENT

- `Googlebot Visit`
- `MSNbot Visit`

Hit property exceeds threshold value

- `Large Page Size`
- `Long Page Generation Time`
- `Page Generation > 5s` - Create this Boolean event to evaluate the output of the `Page Generation Time` event.
- `Page Generation Time > 10s` - Create this Boolean event to evaluate the output of the `Page Generation Time` event.

- `Page Generation Time > 15s` - Create this Boolean event to evaluate the output of the `Page Generation Time` event.
- `Page Generation Time > 20s` - Create this Boolean event to evaluate the output of the `Page Generation Time` event.

0-sized response

- Create Boolean event to detect value of the `Session Response MB` event is equal to `0`.

URL

Note: These events must be created for your specific web application to detect the URLs of the pages where these business functions are performed.

- `Checkout: Sign-in`
- `Checkout: Billing and Shipping`
- `Checkout: Payment`
- `Checkout: Summary`
- `Checkout: Confirmation`
- `Web Application 1`
- `Web Application`

HTTP REFERER

- `Came from Login Page` - Create this event to detect the value of the REFERRER item in the request that is indicating the login page of your web application.
- `Came from shopping cart` - Create this event to detect the value of the REFERRER item in the request that is indicating the shopping cart page of your web application.

Login field in [urlfield] section of Tealeaf request

- Non-blank login field
- Login field not present

Useful events based on response text

- Error uncompressing page
- Global Error Page
- Credit Card Declined
- Credit Card Number Invalid
- Credit Card Zip Code Mismatch

Compound Events

- Came to Billing page from shopping cart: Events 1(e)ii AND 1(f)ii
- Came to Billing page sign-in through login: Events 1(e)ii AND 1(g)i
- Came to Billing page through anonymous sign-in: Events 1(e)ii AND 1(f)i AND 1(g)ii
- Checkout count: OR of all Events in 1e
- Page Generation Time > 5s in Checkout: Events 1(c)iiA AND 3d
- Page Generation Time > 10s in Checkout: Events 1(c)iiB AND 3d
- Page Generation Time > 15s in Checkout: Events 1(c)iiC AND 3d
- Page Generation Time > 20s in Checkout: Events 1(c)iiD AND 3d
- 0-sized response in Checkout: Events 1d AND 3d

- Global Error Page in Checkout: Events 2b AND 3d
- HTTP 40x - 403 OR 404 Errors: Events 1(a)iv OR 1(a)v
- Web Application 1 - 40x Errors: Events 1(e)vi AND 3k
- Web Application 1 - 500 Errors: Events 1(e)vi AND 1(a)vii
- Web Application 1 - Long Page Time: Events 1(e)vi AND 1(c)iiE
- Web Application 1 - Large Page Size: Events 1(e)vi AND 1(c)i
- Web Application 2 - 40x Errors: Events 1(e)vii AND 3k
- Web Application 2 - 500 Errors: Events 1(e)vii AND 1(a)vii
- Web Application 2 - Long Page Time: Events 1(e)vii AND 1(c)iiE
- Web Application 2 - Large Page Size: Events 1(e)vii AND 1(c)i

KPI scorecard example: checkout
In this example, the KPI scorecard measures the performance of key pages in the following checkout process.

Procedure

1. Create scorecard: Define per-hit events to detect the following conditions:
   a) Create a simple per-hit event that detects all HTTP client error (4xx) status codes by looking for the following string in the Tealeaf request:

   ```
   \nStatusCode=4
   ```

   b) Create a simple per-hit event that detects all HTTP server error (5xx) status codes by looking for the following string in the Tealeaf request:

   ```
   \nStatusCode=5
   ```

   c) Create an `After Every Hit` event that uses the above two events as conditions to detect all HTTP error status codes.
   d) Create five `After Every Hit` events that detect the preceding error-detecting event when it occurs on each of the five pages that are listed as Process Steps. See Example Scorecards.
   e) Create an `After Every Hit` event of all the page-specific events that are defined in the previous step to detect the error-detecting event when it occurs on any of the Process Step pages.
2. Create scorecard: Create a KPI scorecard that uses Negative Comparison.
3. Use the event that is detecting the process's first page (which can be either `/addtobasket.jsp` or `/getsavedbasket.jsp`). Configure the count of this event to be the scorecard's activity indicator.
4. In the scorecard, create a single availability group by using the five page-specific "all errors" events and weight them by the importance of each page. These weights can be used to define the availability letter grade.
   For example, the grading weights can be:
   - HTTP error code on `/addtobasket.jsp OR /getsavedbasket.jsp`: 5%
   - HTTP error code on `/checkout.jsp`: 20%.
   - HTTP error code on `/shipping.jsp`: 10%.
   - HTTP error code on `/confirm.jsp`: 15%.
   - HTTP error code on `/ordercompleted.jsp`: 50%.

KPI scorecard example: checkout errors
Define the following KPI groups.

Checkout Errors

- Global Error Page in Checkout
- 0-sized response in Checkout
- Page Generation Time > 5s in Checkout
- Page Generation Time > 10s in Checkout
- Page Generation Time > 15s in Checkout
- Page Generation Time > 20s in Checkout
- Checkout Paths
- Came to Billing page from shopping cart
- Came to Billing page sign in through login

KPI scorecard example: spiders
Define the following KPI groups.

Spider Visits

- Googlebot Visit
- MSNbot Visit

KPI scorecard example: transaction failures

Define the following KPI groups.

Credit Card Failures

- Credit Card Declined
- Credit Card Number Invalid
- Credit Card Zip Code Mismatch

KPI scorecard example: unacceptable response time

Define the following KPI groups.

Response Time Errors

- Page Generation Time > 5s
- Page Generation Time > 10s
- Page Generation Time > 15s
- Page Generation Time > 20s

KPI scorecard example: multiple applications

Define the following KPI groups.

Web Application 1

- Web Application 1 - 40x Errors
- Web Application 1 - 500 Errors
- Web Application 1 - Long Page Time
- Web Application 1 - Large Page Size
- Web Application 2 - Large Page Size

cxView dashboards

A dashboard can be used to monitor fundamentals of the Tealeaf system or track high-level reports on overall website performance. Through dashboards, you can customize your suite of Portal reports to meet your enterprise or personal requirements.

A dashboard displays data from a single day. Each dashboard is composed of one or more reporting components, which can be reports, charts, or tables. You can:

- Configure the dashboard to display data from a different date in the Dashboard Options window.
- Select dashboards from the Dashboards menu in the portal, which contains your default dashboard and the five used most recently dashboards.
- Create more dashboards to meet various reporting and user group needs.
- Easily customized dashboards for specific roles and responsibilities to show only the most relevant reports and metrics.

The Tealeaf system provides several pre-configured dashboards.

You must have access and permissions to view the dashboard menu or any specific dashboard with all its components. For example, if the dashboard contains scorecards, you must have permissions to view each scorecard and access to the scorecard feature in the Portal.

From the list of available dashboards, you can select the dashboard to edit or create a new one. Available dashboards are listed in the Dashboards tab:

- Plain text - Owned by the current user.
- Bold text - Default dashboard.

What are the dashboard options

You have several options to choose from to display your dashboard.

The following dashboard options are available.

- **Change Focus Date** - To change the date for which the dashboard displays data, move the mouse over **Change Focus Date**. The calendar is displayed. Use the calendar controls to select the date whose data you want to display in the dashboard.
- **Launch in Remote Window** - To display your dashboard in a second browser window, click **Launch in Remote Window**. This option is useful if you want to monitor activities in your browser while you complete other tasks in the Portal.
- **Export/Email Dashboard** - Export or email the current dashboard
- **Switch Dashboard** - To select a different dashboard, click **Switch Dashboard**. In the **Dashboard Selector**, select the new dashboard to display.

To access dashboard options, click **Options** in the upper-right corner.

Dashboards provided by Tealeaf
Tealeaf provides the several default dashboards.

Table 8. Dashboards Provided by Tealeaf

Dashboard Name	Tealeaf Product	Description
Tealeaf System Status	IBM Tealeaf cxView	Dashboard contains status reports on Active, Canister, DeCoupleEx, and Storage aspects of the Tealeaf system.
Technical Site Metrics	IBM Tealeaf cxView	This dashboard provides detail reports on current user, session, and page-level data.

Table 8. Dashboards Provided by Tealeaf (continued)		
Dashboard Name	**Tealeaf Product**	**Description**
IBM Tealeaf cxReveal Executive Dashboard	IBM Tealeaf cxReveal	For IBM Tealeaf cxReveal executives and managers, this dashboard provides insight into IBM Tealeaf cxReveal user searches and replays.

Dashboard report data

The Tealeaf Data Collector polls each Canister for session data to aggregate and store in the appropriate databases. Typically, the Data Collector polls at 5-minute intervals. When a scorecard or dashboard is queried, this aggregated data is used to populate the report.

The Data Collector requires access to all Canisters in the Tealeaf environment, and all Canisters must be receiving data. If an active canister is not receiving data or cannot be reached because of network interruption, the data collector fails the data collection process. It happens as running a partial collection corrupts the reports that use it.

All Tealeaf Canisters must be receiving session data and must be accessible over the network. If any canister is unavailable or not receiving data, report data collection is suspended. Scorecards and dashboards are not updated with new data until the problem is fixed. When collection resumes, reports are not updated until all spooled canister data is collected, aggregated, and stored in the database.

Dashboard schedule field definitions

If you need more information about populating fields while creating dashboard schedules, you can find them here.

General field names and field definitions

This list contains the field names and field definitions for the General tab:

- **Active** - Click the check box to enable the dashboard schedule.
- **Description** - This description is displayed in the Portal.
- **Schedule** - Schedule the dashboard by type:
  - **Daily** - Select the days of the week when the dashboard is to be processed.
  - **Weekly** - Select the single day of the week when the dashboard is to be processed.
  - **Monthly** - From the drop-down, select the day of the month when the dashboard is to be processed.
- **Send At** -Select the time when the dashboard is processed and delivered. Time is based on the Tealeaf system time zone.
- **Focus Day Offset** - Optionally, you can configure the number of days before the date of execution that you would like to define as "today" in the dashboard. For example, you might configure a dashboard to be processed Tuesday morning to delivers Monday's data to users. In this case, you would set the offset value to 1.
- **Language** - Select the language to use in the dashboard from the drop-down.
- **Recipients** - Enter a comma-separated list of email addresses or aliases to whom to send the dashboard.
- **Dashboard** - Click the link to select the dashboard to send. Select the dashboard and click **Select**.
- **Tab** - Optionally, you can configure the schedule to deliver the contents of a single tab in the dashboard. To deliver all tabs in the scheduled dashboard, select **<All Tabs>** .
- **Email Format** - Select the format in which to send the dashboard: PDF, HTML or both.

Dashboard field definitions

If you need more information about populating fields while managing Dashboards, you can find them here.

General field names and field definitions

This list contains the field names and field definitions for the General tab:

- **ID** - An internal identifier for the dashboard.
- **Title** - The user readable name for the dashboard. This name is displayed in the **Dashboard** screen and the portal menu.
- **Default Tab** - When the dashboard is loaded, the specified tab is selected by default.
- **Active** - If inactive, the dashboard is not displayed in the dashboards menu and cannot be emailed..

Data Tabs field names and field definitions

This list contains the field names and field definitions for the **Data Tabs** tab:

- **Active Status** - add charts and tables from the Active Status report.
- **Canister Status** - provides updated information about the Tealeaf Canisters in your environment.
- **DecoupleEx Status Report** - indicates the operational status of the Tealeaf Transport Service and the Short Term Canister.
- **Storage Status** - These components provide status information about long-term storage for the Canisters of the environment.
- **Database Status** - Status of the dashboard.
- **Session Distribution Report** - Session distribution between single and multi-hit sessions.
- **Single Page Sessions Report** - Percentages of single-hit sessions and stand-alone hits
- **Hit Distribution Report** - Distribution of hits across servers in the environment.
- **Top Active Events Report** - Counts of the top active events.

History field names and field definitions

This list contains the field names and field definitions for the History tab:

- **Created At** - Time stamp for when the schedule was created.
- **Scheduled At** - Time stamp for when the schedule's next execution.
- **Log Level** - Success or failure of the scheduled report.
- **Message** - Detail message on status of report execution.

Setting the default dashboard

From the dashboards available to you, you can select the dashboard to display as your personal default in the Dashboard menu.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Dashboards**.
2. Select **Set Default Dashboard**.
3. In the **Dashboards** drop-down, select the dashboard that you like to display at the top of the Dashboards menu.
4. Click **OK**.

   When you next log in, this dashboard is displayed at the top of the dashboards menu.

Creating dashboards

You can create dashboards which can contain one or more components.

About this task

Before you begin creating a new dashboard, you should have already decided how to organize the dashboard.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Dashboards**.
2. Select **Dashboards**.
3. Click the **Add Dashboard** icon.
   The **Create Dashboard** window is displayed.
4. Enter the **Dashboard Name** and click **OK**.
   The dashboard is saved.
5. Select the **Dashboard** name you entered in the previous step and click **Edit Dashboard**.
   The **General** tab is displayed.
6. Select the **Tabs** tab.
   You are presented with a **Default** tab.
7. You can rename the Default tab, if needed.
   - Click **Edit**.
   - Enter a new **Tab Name**.
   - Click **OK**.

   The tab name appears in the **Tabs** panel.
8. You can add another tab to the dashboard.
   - Select **Add Tab**.
   - Enter the **Tab Name**.
   - Click **OK**.

   The tab name appears in the **Tabs** panel.
9. You can add any **Existing Components** to the **Dashboard**.
   - Click **Add Component**. The **Component Selector** window is displayed.
   - Select the component to add.
   - Click **Select**. The **Component Selector** window closes and the component is displayed in Red on the **Layout** panel.
   - Repeat this step if you want to add another component.
   - You can use the arrows to change the display order of the components.
10. Click **Save**.
    The configured dashboard is now displayed in the **Dashboard** panel.

Editing dashboards

You can edit dashboards.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Dashboards**.
2. Select the Dashboard to edit.
3. Click the **Edit Dashboard** icon.

The Dashboard opens on the **General** tab.

4. Review and update the fields as required.
5. Select the **Tabs** tab.
6. Review and update the fields as required.
7. Select the **Permissions** tab.
8. Review and update as required.
9. Click **Save**.
   The configured dashboard is now displayed in the **Dashboards** screen.

Deleting dashboards

You can delete dashboards. You can only delete a dashboard if you are the owner.

About this task

Any components that are used by the dashboard are retained and must be deleted separately.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Dashboards**.
2. Select **Dashboards**.
3. Click the Delete Dashboard icon.
4. Confirm that you want to delete the dashboard. Click **OK**.
   The dashboard is deleted.

Exporting dashboards as a report

After you create dashboards, you can create reports based on a schedule. These dashboard reports are delivered to specific email addresses as PDF or HTML based on the schedule.

About this task

General information about dashboard schedules:

- You cannot email snapshots of inactive dashboards.
- To email report snapshots, you must configure an email address in your user account. Do not create snapshot schedules from a Tealeaf administration account.
- Non-administrator users can configure report schedules for reports that they own or are shared to them. The Tealeaf admin can see and configure all schedules.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Dashboards**.
2. Click **Dashboard Schedules**.
3. Click < **Create Schedule**>.
   The **General** tab is displayed.
4. Select the **Scheduling** data.
   - **Daily**, **Weekly**, or **Monthly**
   - **Send At**
   - **Focus Day Offset**
   - **Language**
5. Select the **Options**.
   - **<Select a dashboard>** - click this and then select a dashboard and click **Select**.

- **Tabs**
- **Email Format**

6. Enter the email address for the **Recipients**.
   - **To:**
   - **Cc:**
   - **Bcc:**
7. Click **Save**.

   A message is displayed which states the schedule was successfully saved. The schedule is listed in the **Dashboard Schedules** panel.

Editing dashboard schedules

You can edit dashboard schedules that you have created. The dashboard schedule is used to export the dashboard into a report format and email it to some recipients.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Dashboards**.
2. Click **Dashboard Schedules**.

   Dashboard schedules that you have created are listed in the **Dashboard Schedule** pane.
3. Select the **Dashboard Schedule** to edit.
4. Update fields as required.
5. Click **Save**.

   A message is displayed which states the schedule was successfully saved.

Disable dashboard schedules

You can disable dashboard schedules that you have created. The dashboard schedule is used to export the dashboard into a report format and email it to some recipients.

Procedure

1. In the Tealeaf Portal menu, select **Configure** > **Dashboards**.
2. Click **Dashboard Schedules**.
3. Select the Dashboard schedule to disable.
4. Clear the **Active** check box.
5. Click **Save**.

   A message is displayed which states the schedule was successfully saved.

cxView dashboards components

Dashboard components can be placed into one or more dashboard tabs. Each dashboard tab contains the components that are defined by the creator of the dashboard.

Dashboard components overview

Each dashboard tab contains the components that are defined by the creator of the dashboard.

A dashboard tab is composed on multiple dashboard components, which are independent pieces of dashboards. Each dashboard component panel contains a graphical or numerical display of the component's content.

Components can be placed into one or more tabs. Each tab contains the components that are defined by the creator of the dashboard. Each component has controls for editing, drill-down, and refresh.

If you own the dashboard, any changes to the layout are saved and are applied to other users who are sharing your dashboard. Otherwise, changes to the layout for a dashboard that you do not own are temporary.

Multiple dashboards can use the same component. If you change the component in one dashboard, it affects all instances of the component in other dashboards.

Components field definitions
If you need more information about populating component fields, you can find them here.

Components field names and field definitions

This list contains the field names and field definitions for the Components:

- **Component Category** - Select from available components or assemble from component templates. Individual components are configured instances of component templates. You can create new components from templates.
- **Component Type** - Select your component from one of the listed types.
- **Component** - The individual components for the type.
- **Visible On** - The dashboard tabs on which the component is visible.

Components properties in the Data tab

This list contains the Components properties:

- **Component ID** - Internal read-only identifier for the component.
- **Type** - Component Type to which the component belongs.
- **Title** - The component title, which is displayed on the dashboard.
- **Size** - The size of the component, in Portal space units. The small grid to the right of the size inputs indicates the area that is occupied by the component on the page. Dashboard components can be sized both horizontally and vertically, with a minimum value of 1 and a maximum value of 4 in both directions. A dashboard tab can have an unlimited number of rows.
- **Color** - The color of the component title bar.
- **Updates** - The update interval for the component. The component that you add to the dashboard references data from completed sessions only. So configuring an update interval to be more frequent than the interval at which the data collection process is run is not useful. By default, data collection occurs every 5- minutes. In this case, component updates must not occur more frequently than a 5-minute interval for components that are containing completed session data only. If the component references data from active sessions, you can set the update interval to be more frequent than every5-minutes. Depending on the configured component and the number of components in the dashboard, there can be performance impacts.
- **Drilldown** - Available button is displayed in the component title bar. Title bar links the button directly to the full report with the same parameters used to generate the component.

Dashboard component templates
You can use the provided component templates as the basis for creating your own dashboard components.

Use a pre-configured set of dashboard component templates to build your suite of dashboard components to include Portal report data in your dashboards. You can find information about the dashboard component templates with their property descriptions.

Accessing dashboard component templates

You can access component templates and use them to create your own dashboard components.

Procedure

1. From the Portal menu, select **Configure** > **Dashboards**.
   The **Dashboards** screen is displayed.
2. In the left navigation panel, click the **Configuration** category.
3. Select the **Components** link.
4. In the main panel, click **Component Templates**.
5. In the **Component Type** panel in the middle, select the type of component.
6. In the **Component** panel on the right, select the component template to use as the basis for building your own component.
7. To create a component from the selected template, click the **+** icon.

Adding components to a dashboard

You can add components to a dashboard.

About this task

Dashboard names are displayed as folders. Clicking a dashboard name reveals the individual tabs of that dashboard where the component is displayed.

Procedure

1. Select **Available Components**.
2. In the **Component Type** panel, select the type of component to add.
3. Select the component in the **Component** panel.
4. Above the **Visible On** panel, click the **+** sign.
5. In the dialog, click the dashboard name to which you want to add the component. The current tabs on the selected dashboard are displayed beneath the dashboard name.
   - To view the dashboard tab names without the dashboard headings, click the **Individually** check box.
   - To filter the view, select the **Filter** check box and enter a filter string with which to filter the display. Wildcards are accepted. The display is updated to show only those items whose name contains the filter string.
6. Click the name of the tab to which you want to add the component.
7. Click **Select**.
   The **Visible On** panel is updated.

Editing components in a dashboard

You can edit components in a dashboard.

Procedure

1. Select **Available Components**.
   The available types of components are displayed in the **Component Type** panel.
2. In the **Component Type** panel, select the component type and the component to edit.
   If the component is in use, in the Visible On panel you can see the dashboards and tabs where it is displayed.
3. Above the **Visible On** panel, click the **Edit** icon.
4. Edit fields as required.

5. Click **Save**.

Removing components from a dashboard

You can remove components from a dashboard.

About this task

Dashboard names are displayed as folders. Clicking a dashboard name reveals the individual tabs of that dashboard where the component is displayed.

Procedure

1. Select the component to remove in the **Visible On** panel.
2. Click the **-** sign.
   The **Visible On** panel is updated and the component has been removed.

cxView reports templates

Reports templates can be created based on current dashboards and scorecards.

Report templates overview

Report templates are report definitions that can be passed between Tealeaf environments. A report template includes the base container for the template, specified components, and the required events to populate the dashboard with data.

Through the Portal, you can import and export the report templates for scorecards, dashboards, and Report Builder reports.

The following limitations apply to importing report templates:

- If an item in a report, such as an event, dimension, or the report itself exists in the destination system, it is used as-is and is not updated. This comparison is based on internal identifiers, instead of display names
- The report import feature does not provide full support for any scorecards or reports that reference specific dimension values.
- You cannot remap events that are used by a report during the import process.
- You cannot map a report template that is imported to an existing report in the destination system. If five template imports reference a single report, they reference the single instance that is created by the first template import.
- After you import a report template, you cannot re-import it to overwrite the previous version. You must delete the report in the destination system before you attempt to re-import it.
- The ability to import report templates is governed by the `Default Allow Report Template Import` permission at the group level and the `Allow Report Template Import` permission at the individual user level.

Importing dashboard report templates

You can import report templates for dashboards. Before you can import a dashboard template, you must have created one.

Procedure

1. select **Configure** > **Dashboards** in the Portal menu.
2. Click the **Report Templates** category.
3. Click **Import Template**.

4. Click **Browse.**.
5. Go to your local environment to select the `.tlt` file to import. Then, click **Open**.
6. To upload the template, click **OK**.
   The **Import Objects** dialog is displayed.
7. To import the uploaded template, click **Import**.
   If the import is successful, the following message is displayed:

   ```
   The import was successful.
   ```

8. Click **Close**.
   If events are imported with your report template, it can take a few minutes before they are available in the event manager.

Importing scorecard report templates

You can import report templates for scorecards. Before you can import a scorecard report template, you must have create one.

Procedure

1. Select **Configure** > **Scorecards** in the Portal menu.
2. Click the **Report Templates** category.
3. Click **Import Template**.
4. Click **Browse.**.
5. Go to your local environment to select the `.tlt` file to import. Then, click **Open**.
6. To upload the template, click **OK**.
   The **Import Objects** dialog is displayed:.
7. To import the uploaded template, click **Import**.
   If the import is successful, the following message is displayed:

   ```
   The import was successful.
   ```

8. Click **Close**.
   If events are imported with your report template, it can take a few minutes before they are available in the event manager.

Exporting scorecard report templates

You can export report templates for scorecards, dashboards or a report builder report.

Procedure

1. Select **Configure** > **Scorecards** in the Portal menu.
2. Click **Report Templates** category.
3. Select a scorecard to export as a template.
4. Click **Select**.
5. Click **Export Template**.
6. Click **Save**.
   The report template is saved to your local system. Scorecard report templates are exported in `.tlt` format, which is a proprietary format of Tealeaf.

Exporting dashboard report templates

You can export report templates for dashboards.

Procedure

1. Select **Configure** > **Dashboards** in the Portal menu.
2. Click **Report Templates** category.
3. Select a dashboard to export as a template.
4. Click **Select**.
5. Click **Export Template**.
6. Click **Save**.
   The report template is saved to your local system.

cxView top movers report

The Top Movers reports provides tracking and reporting on deviations of values that are monitored by IBM TealeafcxView. In IBM TealeafcxView cxImpact, Top Movers can be created and reported for event data on a daily basis.

When an event is created, you can optionally create a top mover to track the changes in values for the event. The top mover enables easier monitoring of changes in key site metrics.

Top movers report overview

The Top Movers report has the following features:

- Hourly Top Movers: Licensees of IBM Tealeaf cxView can create top movers that monitor deviations on an hourly basis. Hourly top movers enable the tracking of changes in key metrics within the day. It detects and responds to changes in visitor behavior and site performance that occur within a single day.
- Dimension Top Movers: IBM Tealeaf cxView customers can optionally create top movers to track changes in dimension values.
- Ratio Top Movers: IBM Tealeaf cxView customers can also track deviations in values for ratios between events and dimensions.
- Alerts on Top Movers: IBM Tealeaf cxView users can create alerts that are based on Top Movers or reports by using Top Movers.

For more information about reporting top movers, see the *IBM CxImpact Tealeaf Reporting Guide*.

Creating top movers reports

For more information about creating top movers, see the *IBM Tealeaf CX Event Manager Manual*.

Analyzing top movers reports

For more information about reporting for top movers, see the *IBM Tealeaf CxImpact Reporting Guide*.

cxView administrative tasks

In order to perform cxView administrative tasks, you must have administrative permissions.

Migrating reports, scorecards and dashboards

If you are attempting to migrate reports, scorecards, and dashboards from one system to another, Tealeaf recommends this workflow.

Procedure

1. Create Report Builder reports with all of the events you want to migrate.
   - These reports must contain events that are used by any dashboards or scorecards that you want to migrate.
   - These reports do not have to be actively used in your Tealeaf environment; the purpose of creating these reports is to bundle up sets of events, which are migrated with the report.
2. Export all Report Builder report templates that you want to migrate or that contain events you want to migrate.
3. Import them into the destination system.
4. Verify that the events and related event objects are properly imported.
5. In the source system, you can choose to export scorecards and dashboards. Follow the Export Template Steps.

   Note: Tealeaf recommends re-creating scorecards and dashboards in the destination system. However, in some cases, it can be problematic to do so. Issues can occur during the import of these items, which do not affect the events that are already imported through Report Builder reports.
6. Import them into the destination system.

Forcing scorecard recalculation

You can also apply previously calculated data to redefined scorecards. You must have administrator permissions to perform this task.

About this task

For example, if you switch a scorecard definition to use a new event, you can force a recalculation of all scorecards by using the available historical data. The number of days that you extend the scorecard calculation range in the past is directly correlated to how long the recalculation takes. Depending on the length of time and number of scorecards in the system, this recalculation can impact system performance. If possible, you should conduct lengthy recalculations during off-peak periods.

Procedure

1. From the portal menu, select **Tealeaf** > **Portal Management** .
2. Click **IBM Tealeaf CX Settings**.
3. Click the **Data Retention** link.
4. Review the value for Reporting Data (daily)-Days Retain.
   - This setting determines the maximum amount of reporting data that is retained in the database. Typically, this value is set to 365.
   - If Tealeaf system was installed after the date indicated by this setting, you must calculate elapsed days since the first installation. Use the smaller of the Reporting Data (daily)-Days Retain value or the elapsed number of days since installation.
5. Using Excel, you can calculate the following date: Today

   This date is used in the following steps to configure the date from which the next scorecard recalculation begins.

6. In the portal menu, select **Configure** > **Scorecards**.
7. In the left panel, click the **Data Management** entry.
8. Click the **Aggregation Dates** link.
9. For the **Last Interval for Scorecards** (SID=5/Day) entry, click the **edit** icon.
10. Click the **Date** field. From the **Calendar** tool, select the previously calculated date.
11. Click **Save**.

    If the Data Collector's next run is at the top of the subsequent hour, all scorecards in the system are recalculated from the specified date to the current hour.

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