Guide to Software Enhancements in Scoreboard/QuickScore Version 2.11

Edit Permissions Directly in Group Administration

In the latest version of the software there is a new way to assign view organization permissions for groups.

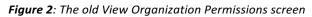
This is how groups were edited in previous versions of the software. There is a collapsible "Advanced Permissions" box where action permissions are assigned by checking the various boxes.

Group Name Training Local Administrators	Group Type
Group Members	User or Group Group Administrators User or Group SMS Notifications SMS Administrators
- Advanced Permissions for Group Members	
(check defau	it uncheck all)
View View All Organization Nodes Modify Personal Home Page Bookmarks Update Metrics Update All Viewable Metric Actual Values Update All Viewable Scoring Threshold Values Initiatives C Edit Action Archive Action Delete Action Reports Modify Reports Briefing Books Modify Briefing Books	Administration Image: Create and Edit Users in Groups They Administer Delete Users in Groups They Administer Modify Organization Node/Hierarchy Structure Modify Dashboards Modify Embeddable Dashboards Modify View Organization Node Permissions Modify Versonally Uploaded Images Super Administration Modify Console Access Modify Comments Modify Related Items Modify Scorecard Overview View Object History

Figure 1: The old Edit Group screen

This is the View Organizations Permissions screen that is used in previous versions of the software. Administrators first choose a group, and then put a checkbox next to the organizations that group can view.

raining	Local Adm	1 Group
Save)	
View	Cascade	
		Army Enterprise
		Army Organizations
		🔵 АСОМ
		FORSCOM
		AMC
		ASC
		RDECOM
) ARL
		AMRDEC
) AMSAA



In the new version of the software, the Edit Group form is much easier to use. Instead of a collapsible "Advanced Permissions" box for every group, there are now two buttons.

raining Local Administrators	Group Type	ninistrators 👻 💢	
roup Members	Add User or Group	Group Administrators	Add User or Group
 Mr. Conor D. Crimmins Mr. Jason B. McKim 		SMS Administrators	
Mr. Scott O'Reilly			
Advanced Permissions Organization Perr	nissions		

Figure 3: The new Edit Group screen

Clicking the first button shows the advanced permissions in a dialog box. This frees up quite a bit of space on the edit group form.

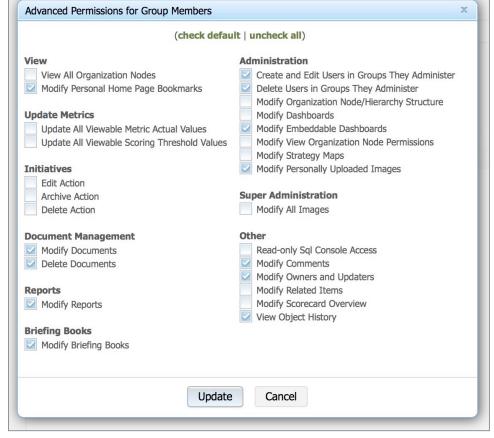


Figure 4: The new Advanced Permissions dialog

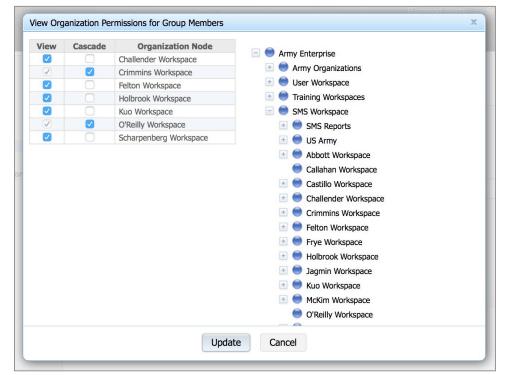


Figure 5: The new Organization Permissions dialog

Clicking the second button shows View Organization permissions for that group. Instead of listing every organization, the form now only shows the organizations the group has permission to view. This is quite a bit faster to use, and it brings all permissions editing into the same area of the software To add a new organization, just click on its name on the right.

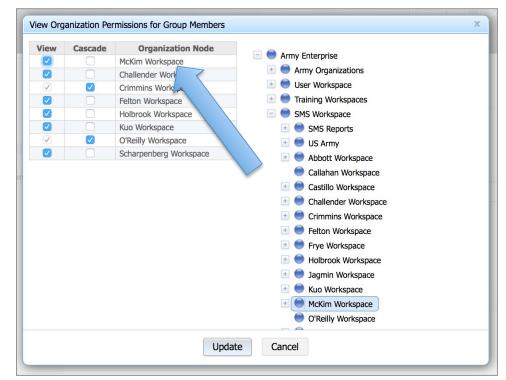


Figure 6: Adding a new Organization Permission

Calendar Period Selector in Reports Section

There is now a calendar period selector in the Reports section. All relative periods in reports now reference this calendar period selector instead of the computer's current date.

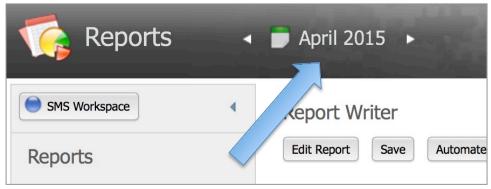


Figure 7: Calendar period selector in Reports

Date Range Selector for Reports in Dashboards

In previous versions of the software, users had to choose a calendar like Monthly or Yearly when embedding reports into the Dashboards section. Users can now choose "Current Calendar" to reference the overall dashboard's calendar.

Changing the embedded dashboard display options will not affect the source report.

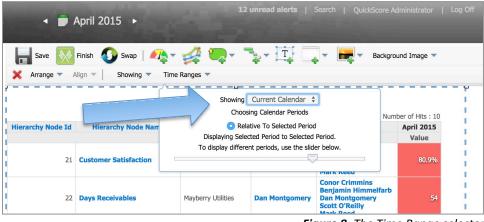


Figure 8: The Time Range selector

Copy and Paste Reports

Reports can now be copied and pasted. If the source and destination organizations have similar scorecard structures, the report's filters will automatically remap to the new organization.

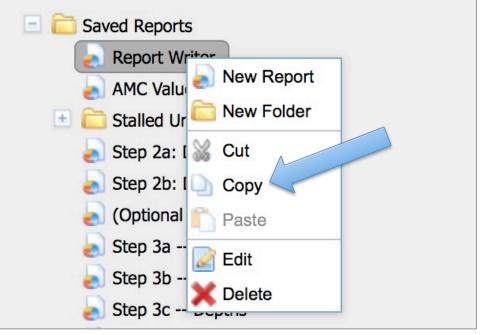


Figure 9: Copying a report

Prepend for Template Copies

In previous versions of the software, administrators could choose to append text to all template copies for scorecards and dashboards. The software now allows them to also prepend text.

Paste Hierarchy		х
You may optionally enter a suffix to be approved a same same same same same same same sa	name of each new hierarchy object. If you add ne name as in the template.	
(phrase before) Template Hierarchy Name	(private creer)	
Before Placeholder Node	After Placeholder Node	
Finish	Cancel	

Figure 10: Prepend for template names

Metric Equation Filter in Reports

There is a new filter in the Reports section called "Equation".

Available Filters		
Choose the field you would like y	our filter to be based on:	
Basic Attributes	Hierarchy Nodes	Metrics
Hierarchy Node Name	Descendant Of	Updater
Hierarchy Node Description	Color	Metric Frequency
Hierarchy Node Type	Weight	Update Type
	Owners	Data Type
	Performance Trend	Aggregation Type
	Spe Hierarchy Nodes	Import Mapping Key
	Score	Value
	Tags	Scoring Type
		Equation

Figure 11: New Equation filter

This filter will return calculated metrics with equations that match a specific phrase.

* Actual or Threshold Equation	✓ Contains any of the terms	
	Contains all of the terms Begins with Ends with	
	Finished Back Cancel	

Figure 12: Equation filter options

Mass-edit for Metric Equations

Users can now also edit multiple metric equations at once in the Reports section by replacing specific phrases.

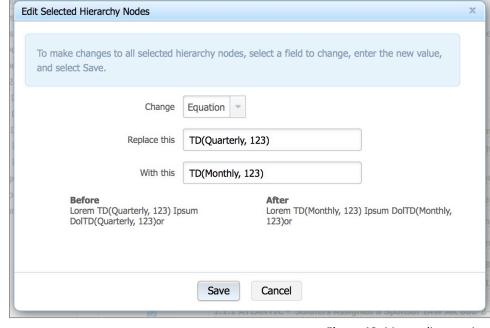
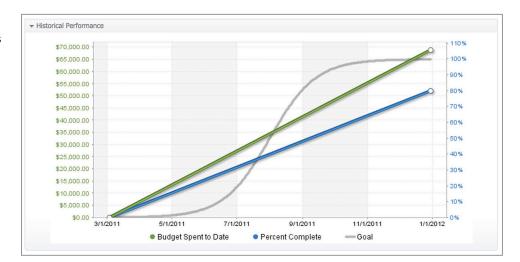


Figure 13: Mass-edit equations



Colored Action Plan Chart Axes

In previous versions of the software the right and left axes on the action plans chart were black. They are now colorcoded to match their corresponding series in the chart.

Figure 14: Colored Gantt chart axes

Gantt Chart Improvements

Labels on Gantt charts have been improved. The action titles now wrap to a new line if they are long, and the date labels on the top no longer overlap.

Gantt Chart - Employee traini	ng needs as	sessment		•) ? **
	1/1/2009	1/1/2010	1/1/2011	1/1/2012	1/1/201
Employee training needs assessment -					
First Call Resolution Training Program -					
Develop First-Call Resolution Training Program					
Review First Call System for recurring errors -					
Developing Training Guidelines -					
Develop First Call Resolution standards for success					٠
Train all CSRs in First-Call Resolution Training Program					٠

Figure 15: Gantt Charts with improved labels

There is also a time range selector above the Gantt chart, allowing users to view the action plans in higher levels of detail.

t Chart - Employee training needs assessment			💽 🕘 💽 🔧	
8/1/20	9/1/2012	10/1/2012	11/1/2012	
Employee training needs assessment -				
First Call Resolution Training Program -	/			
Develop First-Call Resolution Training Program				
Review First Call System for recurring errors -				
Developing Training Guidelines -				
Develop First Call Resolution standards for success	٠			
Train all CSRs in First-Call Resolution _ Training Program			٠	

Figure 16: Showing a small time range on Gantt