# Guide to Software Enhancements in Scoreboard/QuickScore Version 2.15

## **Overriding Default Thresholds and Equations in Templated Metrics**

In the latest version of the software, there is now the ability to edit metrics that are copies of templates.



Figure 1: The Edit option for a templated metric

Cancel
(

The default setting for templated metrics is "Use Template". It automatically pulls in all metric information from the template.

Figure 2: The default "Use Template" option

When the metric settings option is changed to "Override Template", however, many of the metric's settings can be changed. For example, the default goal can be overridden.

_	/				
Outility	ates				
Metric Set	ngs Ag	gregation Ty	/pe		
Override	Femplate 🔽 🔸	<ul> <li>Average</li> </ul>	-		
A	tual Value 📝 Ma	inual 🔻			
	Goal 📝 Ma	inual 👻	0.0925		
		Sa	ave Cancel		
				- -	

Figure 3: The ability to override the default goal

Users can even change the series from manual to calculated, or change a calculated series' equation.

Metric Settings	Aggregation Type Calculated Aggregation Type
Override Template	✓ Average ✓ Average ✓
Actual Value	Ignore missing values
Goal	Manual C.0925
	Save

Figure 4: The ability to override the equation

#### **Replaced Date Range Sliders**

In previous versions of the software, many calendar period ranges in the software were set via sliders. This worked well at first, but as the number of calendar periods grew, it became increasingly difficult to precisely choose ranges.



Figure 5: The old slider



Figure 6: The new dropdowns

All sliders have now been replaced with two dropdowns, one for the beginning and one for the end. This is much more precise, and avoids accidental changes to the range.

## **Override Historical Thresholds**

When a metric is created, every threshold needs a default value. This is used later when the metric is updated with an actual value. The thresholds are stored along with the actual values so that the software can show what the goals were in the past.

One problem with remembering historical thresholds, however, is that if an administrator wants to retroactively change them, she would need to manually change the thresholds for every historical metric value.

There is now the ability to override historical thresholds when changing a metric's default thresholds. This will dramatically reduce administration time.

Decimal Precision: (Truncates beyond precision) 2	ed) 🗘
Decimal Precision: (Truncates beyond precision) 2	
Decimal Precision: (Truncates beyond precision) 2 (Leave blank to use default)	
Update Type: Default Value:	
Actual Value: Manual \$	
Red Threshold: Manual \$ 99%	
Green Three Manual \$ 99.98%	
Also change existing metric updates to use these thresholds	
Replace Thresholds Starting: 1/31/2008	5

Figure 7: The ability to override historical thresholds

#### **Relative Connect Import Dates**

Connect now has the ability to choose a relative period when importing metric values. This can be helpful when importing metric values after a period has ended.

<b>≪</b> Connect <sup>™</sup>		
Home >> Edit In	mport >> Source Data	
Upload File Directory File Listing JW Connect Structure2.xlsx × multitest.xlsx ×	Won # Users pe Use a date header row for imports Use a date header row for imports Use a relative period Use this specific date for each import Unused	✓ Current Period
stuff.xlsx 🗙 _Users per Month.xls 🗙	( Metric Id/Name ) ( Value ) ( Note ) ( Threshold )	

Figure 8: Connect's relative date options

#### **Additional Metric Value Filters in Reports**

The following options have been added to the metric value filter in Report Writer:

- Null
- N/A
- Yes
- No

Malua		
Value	Is Null	
in Any	Is N/A	
	Is Ves	
* Ca	Is No	
	Less Than  Relative	
* Be	Greater Than 08 \$ 1 Period Earlier \$	
De	Between	
* End	ing January 2008 🗘 Current Period 🗘	
	Finished Back Cancel	

Figure 9: The 8 metric value filter options

## Show Metric IDs on Mouseover when Building Metric Equations

It can be helpful to know a metric's ID before adding it to an equation. Because of this, the software now shows the metric ID on mouseover in the equation builder.

Edit Metric Equation	n	x
Actual Value:	+ - * / ( )	
🗄 🛑 IT (Tier Mayber	Utilities (ce (Tier 2)) er 2) Enprove Use of Technology Copy ○ IT Satisfaction Score Copy ○ Technology Spend Copy ↓ Increase Employee Motiva 80	
	Back Add Owners and Updaters Finished	

Figure 10: Metric ID on mouseover

#### Larger Metric Equation Builder

In previous versions of the software, the input box for metric equations was sometimes too small for larger equations.



Figure 11: The old smaller metric equation box

Actual Value:	
( expand all   collapse all )	(35) This Metric (expand all   collapse all )
Marce (Her 2)     IT (Tier 2)     Mayberry 2	Customer     A Financial
Mayberry Templated Copy	Actual Value      Current Period     Add
Back	Add Owners and Updaters Finished

Figure 12: The new larger metric equation box

The metric equation box is now much larger.

#### **Dashboard Text Object Alignment**

In the past, there was no way to align text boxes on dashboards. Now text boxes can be aligned just like any other dashboard object.



Figure 13: Aligning text boxes

#### **Improved Note Spacing on Dashboards**

In previous versions of the software, comments on dashboards had too much extra space when things like titles and controls were turned off.

In the latest version of the software, the dashboard comment spacing is much better in these situations.



Figure 14: The old notes spacing



Figure 15: The new notes spacing

## Percentage Metrics Default to Average Aggregation

Percentage metrics now default to Average for their aggregation type. Sum doesn't really make sense for a percentage metric, so Average is a better default choice.

New Metric	Mantaomone Quarterry	X
Data Type: Aggregation Type:	Percentage 🗘 Average	\$
Import Mapping Key:		
Decimal Precision: (Truncates beyond precision) (Leave blank to use default)		

Figure 16: Default aggregation type for percentage metrics

## **Improved Delete Messages**

The delete messages in the software are now much more explicit about objects being permanently deleted.

Metric	ID: <b>35</b>
Confir	m Deletion ×
	Are you sure you want to delete Hierarchy Node "System Uptime"? Caution: Once this has been deleted, there is no way to recover it.
	Yes No

Figure 17: The new delete message

## **Remember Navigation Pane Size**

When a user resizes the navigation pane, the software now remembers and preserves this new size as they navigate through the application.

Scorecards Metrics 🔹 🖬 📄	Quarte	er 2, 2012 🕨				0 unread ale	rts   Searc	h   QuickS	core Administ	rator   Lo
Mayberry Utilities ( expand all   collapse all )	_	etrics Report - May		es Tier 1 port Values			(	<u>ج</u>	9	•
Mayberry Utilities Tier 1     Customer	ID		Owner(s)	Assigned Calendar	Series	Quarter 2, 2011	Quarter 3, 2011	Quarter 4, 2011	Quarter 1, 2012	Quarter 2, 2012
E ▲ Customer E ▲ ① Financial	20		Dan Montgomery	Quarterly	Actual Value	\$0.165	\$0.0968	\$0.1534	\$0.1084	N/A
A 00 Internal Business Processes A 00 Improve & Expand Value-Added Services	ľ	ner Satisfaction	Dan Montgomery	Quarterly	Actual Value	93.9%	91.4%	90.2%	91.9%	86.6%
		Days Receivables	Dan Montgomery	Monthly	Actual Value	31	52	32	24	27
Enhance Stakeholder Relationships Symposium Communications	23	Non-sales Revenue	Dan Montgomery	Monthly	Actual Value	\$30.00	\$29.00	\$26.00	\$25.00	\$18.00
<ul> <li>A          <ul> <li>A              </li> <li>A</li></ul></li></ul>	24	Costs	Dan Montgomery	Monthly	Actual Value	\$331.00	\$444.00	\$400.00	\$321.00	\$307.00
	25	Sales Revenue	Dan Montgomery	Monthly	Actual Value	\$367	\$650	\$248	\$344	\$332
	26	Revenue per Customer	Dan Montgomery	Monthly	Actual Value	\$2,673	\$3,083	\$1,046		
	43	Non-residential Revenue		Monthly	Actual Value			\$16.00		
	27	Product and Service Introductions	Dan Montgomery	Quarterly	Actual Value	1				
	33	Employee Productivity	Dan Montgomery	Quarterly	Actual Value	\$590	\$782	\$872	\$983	\$1,016
	34	Community Image	Dan Montgomery	Yearly	Actual	86.1%	86.1%	86.1%		

Figure 18: The navigation pane resize handle

#### Additional Single Sign-on Options

There are now additional single sign-on options for the software, OpenID or Okta.

Quick	Score <sup>®</sup> ce Information System		BALANCED SCORECARD INSTITUTE powered by Spider Strategies
forw	This database uses a third-party thentication service. Clicking submit will rard you to that service where you will be ompted for a user name and password.		
Database	JW MySQL Score Calc Submit	*	

Figure 19: Single sign-on login