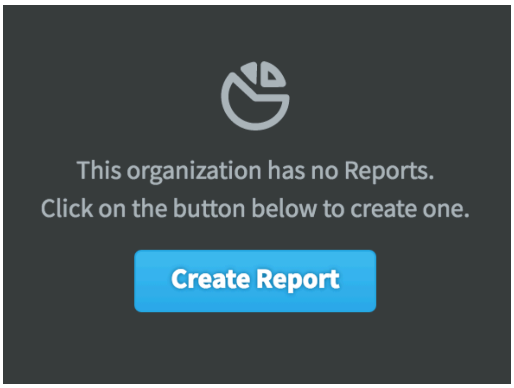
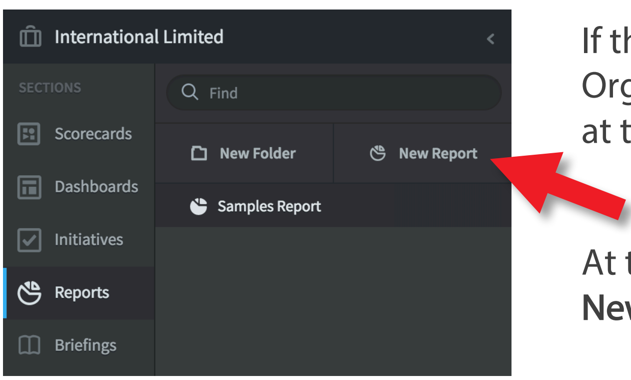
Building Reports - 1

Together with Scorecards, Dashboards and Initiatives, **Reports** can be added into an Organisation. First Click on the Briefcase icon and select an Organisation into which you want to add a **Report**.

Please Note: in Scoreboard a 'report' is a row and column view of the data

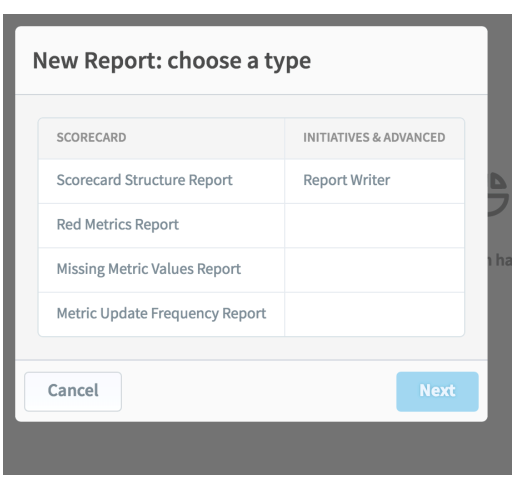


If this is the first Report in the Organisation selected, click on the blue **Create Report** button and miss the next step



If this is not the first Report in the Organisation selected, then click on **Edit** at the bottom of the menu list.

At the top of the menu list click on the **New Report** button



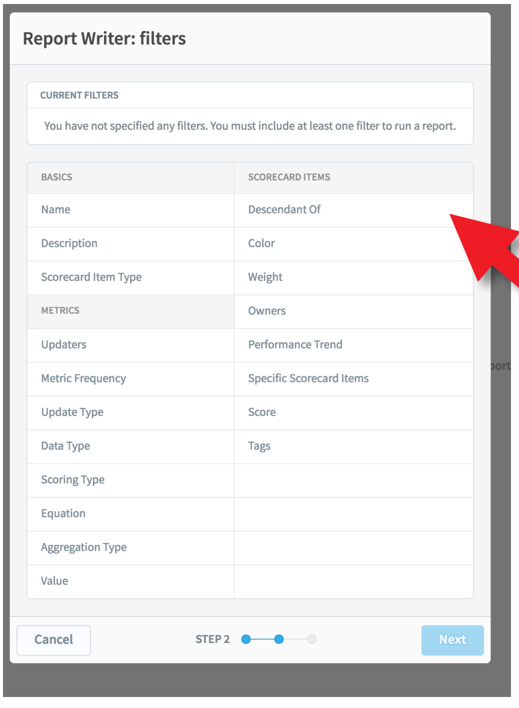
The **New Report** dialogue will appear.

You can select a standard report from the left hand side of the window or create a custom report by clicking on **Report Writer**

Click on **Report Writer**. The item will be highlighted, click **Next**

intrafocus

Building Reports - 2

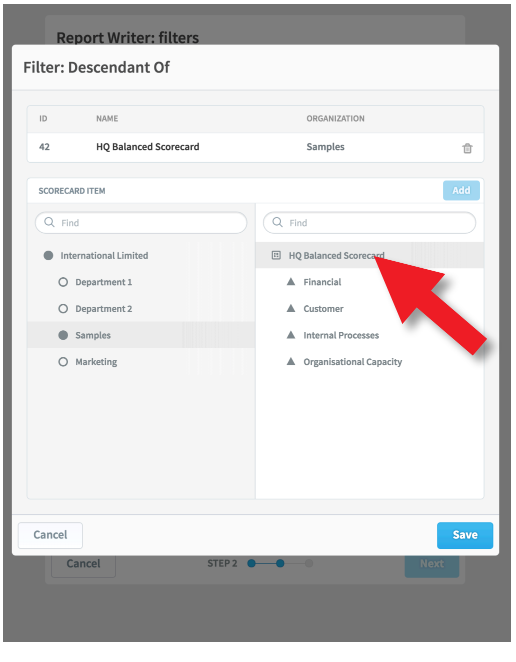


The **Report Writer: filters** dialogue will appear. You can select as many filters as you like.

When you have time, experiment with the filters to create a variety of row and column reports.

For now select **Decedents Of**

And click **Next**



A new overlay dialogue will appear with the now familiar Organisation Tree.

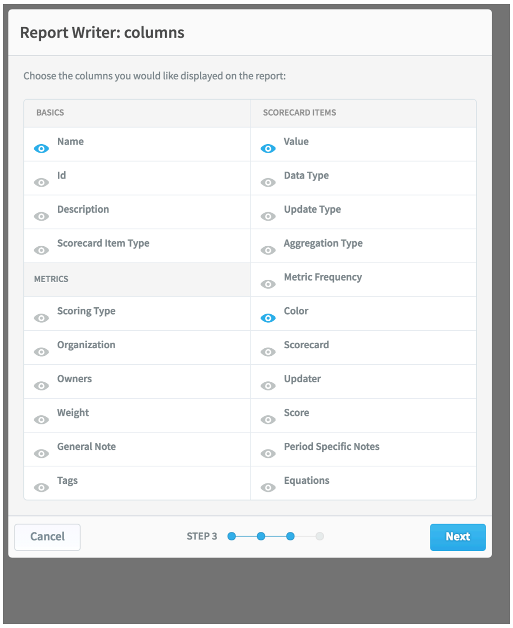
Our first filter was **Descendants Of**, so we are going to select **Samples** and the top-level **HQ Balanced Scorecard** to show all of the items below it (the decedents)

Click on **HQ Balanced Scorecard** and then click on **Add**

You can select as many scorecards as you wish, for now click **Save**

You will be returned to the previous dialogue, click **Next** to move to the next step

Building Reports - 3



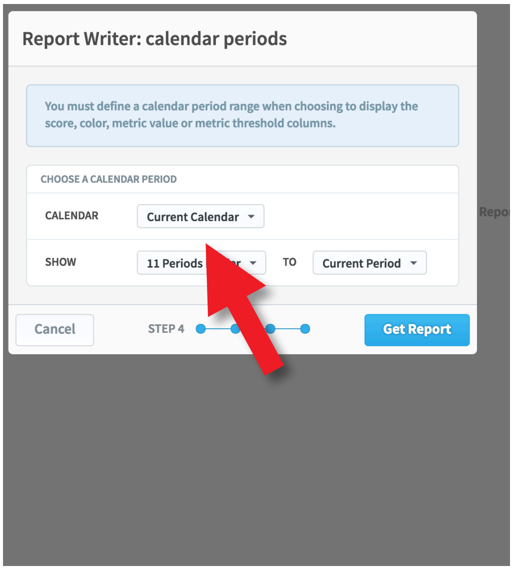
The **Report Writer: Columns** dialogue will appear. This allows you to select the columns you want to appear in the report.

As you select items you will see the 'eye' icon change colour to blue.

Select the following:

- **Name** - the name of the object
- **Value** - it's actual value
- **Color** - to enable red/amber/green

Click **Next**



The **Report Writer: calendar periods** dialogue will appear. This allows you to define which time periods you want to look at.

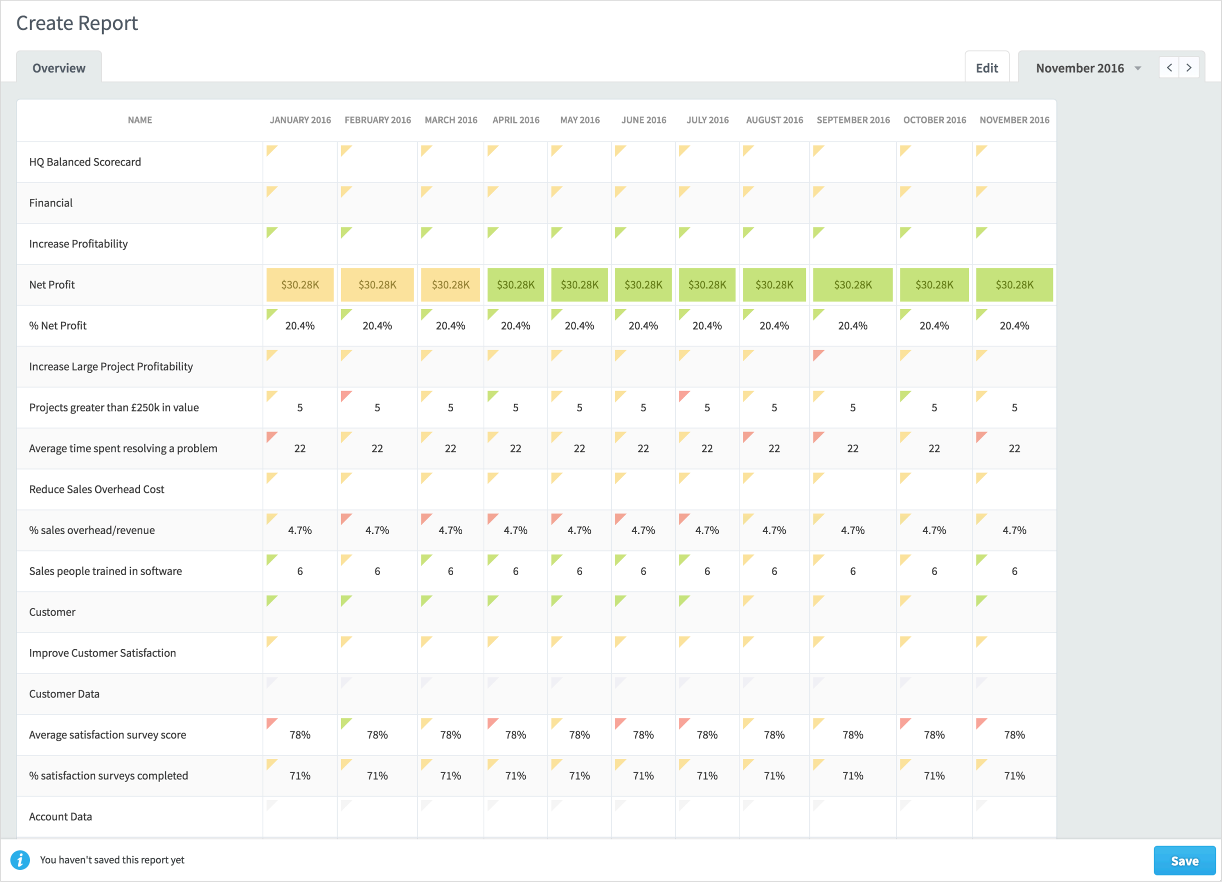
Leave **Calendar** on Current Calendar, this will default to the calendar selected in other parts of the application.

For **Show**, click on the first drop-down and select **11 Periods Earlier**. This will give a 12 month view of the data up to and including the current month.

Click **Get Report**

Building Reports - 4

The Report will appear, it will look something like this:



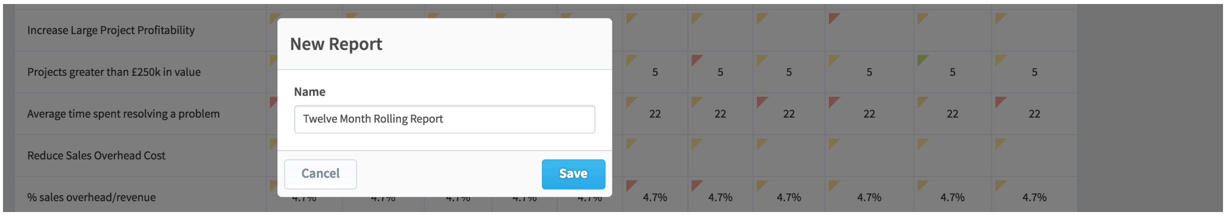
Create Report

Overview | Edit | November 2016

NAME	JANUARY 2016	FEBRUARY 2016	MARCH 2016	APRIL 2016	MAY 2016	JUNE 2016	JULY 2016	AUGUST 2016	SEPTEMBER 2016	OCTOBER 2016	NOVEMBER 2016
HQ Balanced Scorecard											
Financial											
Increase Profitability											
Net Profit	$30.28K	$30.28K	$30.28K	$30.28K	$30.28K	$30.28K	$30.28K	$30.28K	$30.28K	$30.28K	$30.28K
% Net Profit	20.4%	20.4%	20.4%	20.4%	20.4%	20.4%	20.4%	20.4%	20.4%	20.4%	20.4%
Increase Large Project Profitability											
Projects greater than £250k in value	5	5	5	5	5	5	5	5	5	5	5
Average time spent resolving a problem	22	22	22	22	22	22	22	22	22	22	22
Reduce Sales Overhead Cost											
% sales overhead/revenue	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%
Sales people trained in software	6	6	6	6	6	6	6	6	6	6	6
Customer											
Improve Customer Satisfaction											
Customer Data											
Average satisfaction survey score	78%	78%	78%	78%	78%	78%	78%	78%	78%	78%	78%
% satisfaction surveys completed	71%	71%	71%	71%	71%	71%	71%	71%	71%	71%	71%
Account Data											

You haven't saved this report yet | Save

If you are happy with the report, click **Save,** you will be prompter to give it a name:



Click **Save** again. You can create as many Reports as you need. When you have time be sure to experiment. The report writer is very flexible.