You can add the following items to a Scorecard:

- Perspectives

- Generic Items (containers)

- Objectives

- Metrics

If you <u>only</u> want to add Metrics to your scorecard then miss this section and go straight to the **Creating Metrics** guide

Adding Perspectives, Generics and Objectives

Perspectives, Generic Items and Objectives are all types of 'containers' that are used to group **Metrics.** The same process is used to create each of them.

It is up to you to decide how you want to group Metrics to best suit your organisation. Typically, a grouping might look like this:

- Scorecard
  - Perspective
    - Objective
      - Metric
      - Metric
    - Objective
      - Metric
      - Metric
    - Objective
      - Metric
  - Perspective
    - Objective
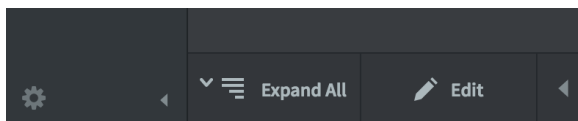   - Metric
      - Metric
  - Etc.
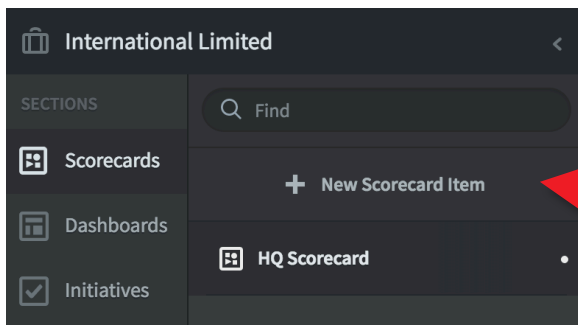
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Adding Perspectives/Objectives

The application will take care of scoring each Metric and will roll up the score values to Objectives, Generics and Perspectives.
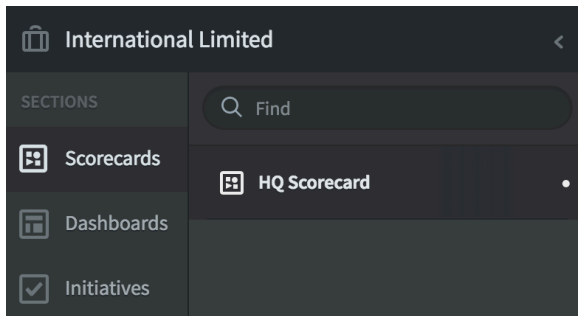
To add a Perspective, Objective or Generic container click on the Scorecard name (in our example HQ Scorecard) to highlight the Scorecard
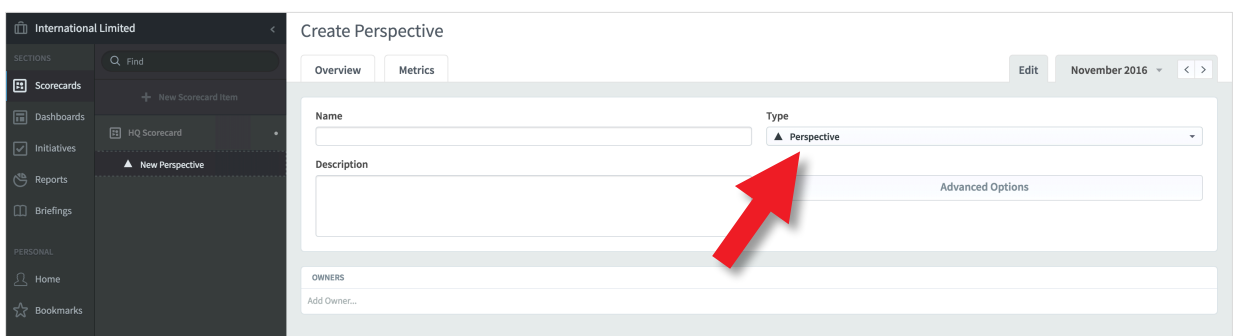

Click on Edit at the bottom of the Scorecard menu.

At the top of the Scorecard menu a **+ New Scorecard Item** button has appeared

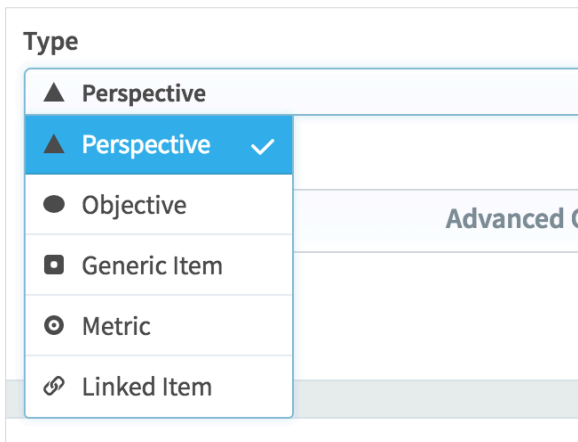Click on this button and the **Create Perspective** dialogue will appear:

Use the **Type** drop-down to select the type of container you want - they all act in the same way, they just have different names.
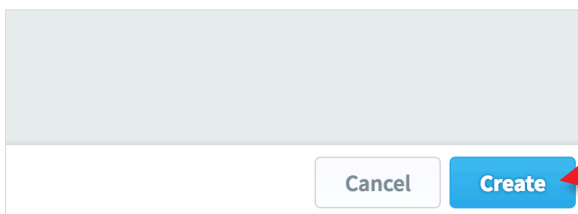
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To illustrate this process we will add a **Perspective** called the Financial Perspective and an **Objective** called Improve Profit
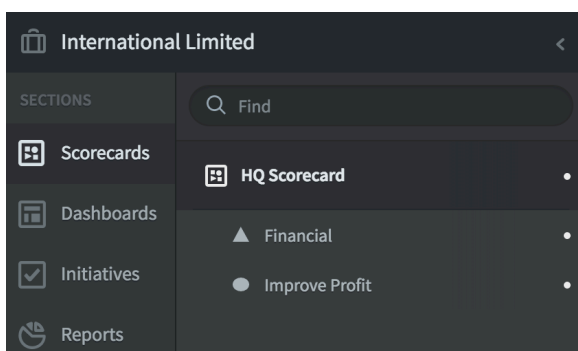

Click on the Type drop-down and select **Perspective**

Give the Perspective a name, we have called it Financial, optionally you can add a description
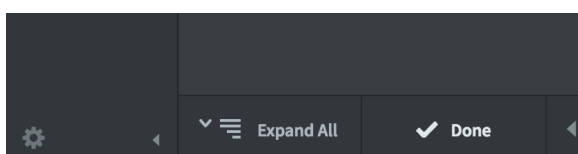

Click on the blue Create button at the bottom of the screen

The application will save the Perspective, you will see it to the left in the list. A blank dialogue box will be presented for the next activity.

This time select Objective from the Type drop-down and give the Objective a name. We have called it **Improve Profit**
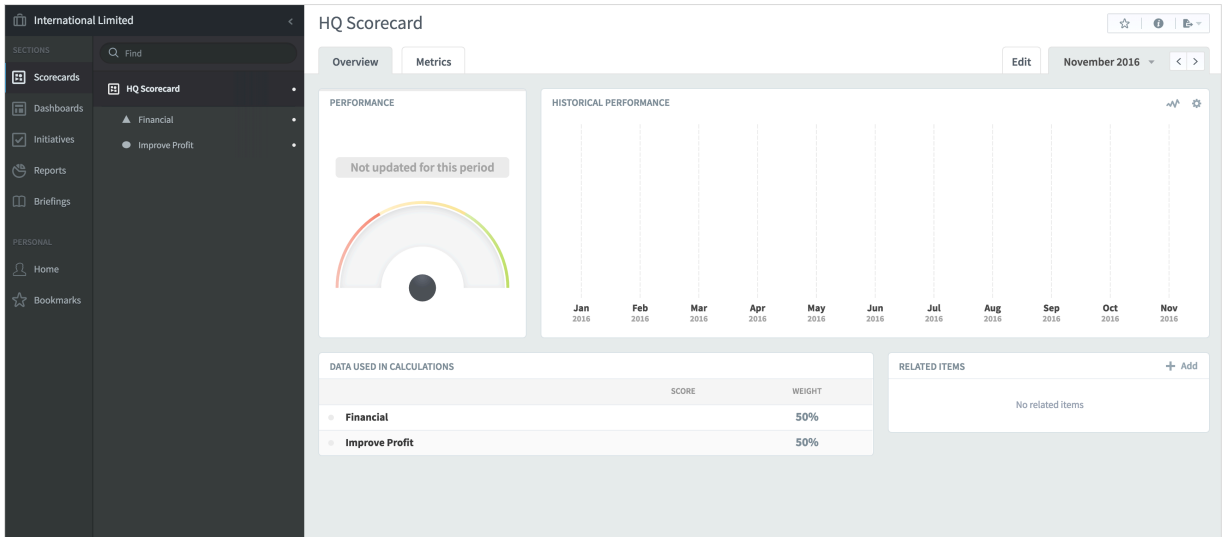
The Objective will appear in the list, click on Done at the bottom of the menu list
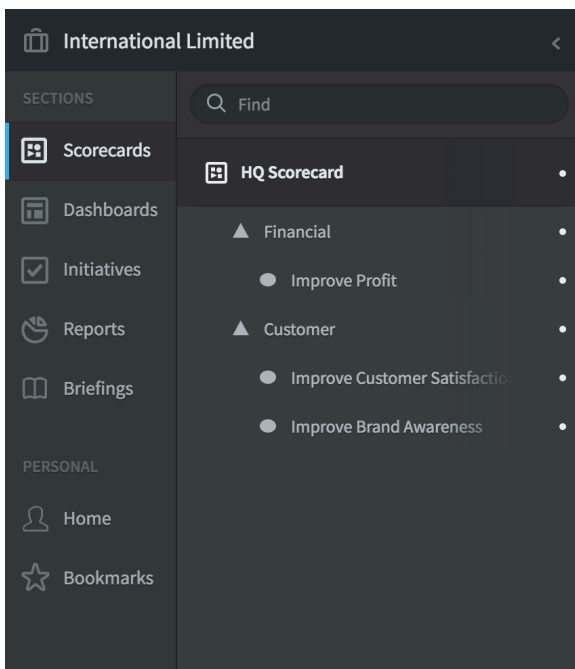
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Arranging a Scorecard

At this point the Scorecard should look something like this:

You can add as many items to your scorecard as you wish. At some point you will need to arrange the items. They can be moved and tiered.

Click Edit at the bottom of the menu list, then drag an drop the items in the list to the correct places.

In the example to the left we have added a customer Perspective, an Objective called Improve Customer Satisfaction and an Objective called Improve Brand Image

These have been Tiered by dragging into the correct position

Click Done at the bottom of the menu list when you have finished

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