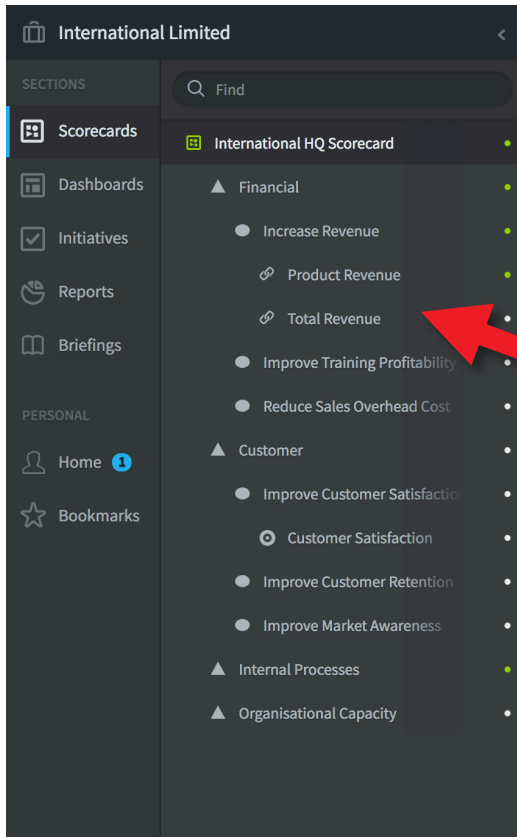




Linking Metrics (Objects) - 1

Data within the application should never be duplicated. However, there are times when the same data needs to be used in two or more places. To achieve this, objects can be 'Linked'. This preserves a single-source of truth while at the same time providing flexibility.

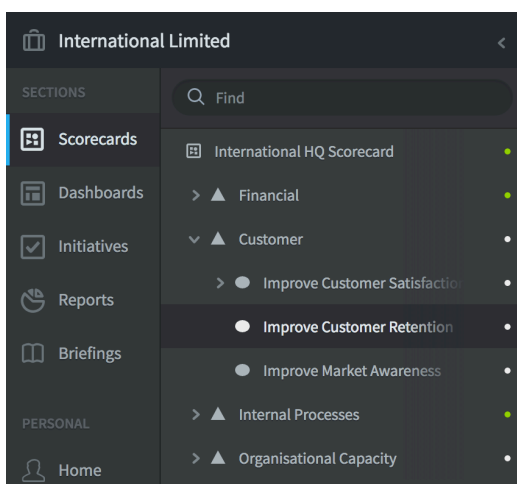


The most common example of 'Linked Metrics' can be seen in an HQ scorecard where HQ objectives are underpinned by metrics that reside in other departments or scorecards.

The example to the left shows two 'linked' metrics under the objective Increase Revenue (represented by the link icon).

These metrics actually reside in the Financial Department's scorecard and are referenced using the Link function.

Whereas, under the objective Improve Customer Satisfaction we can see an actual metric (represented by the circle icon).



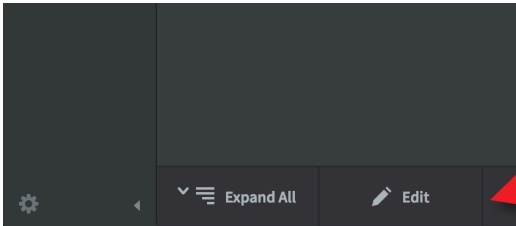
To Link a Metric (or object)

The process of linking is the same for any object. First go to the object you want to link another object to.

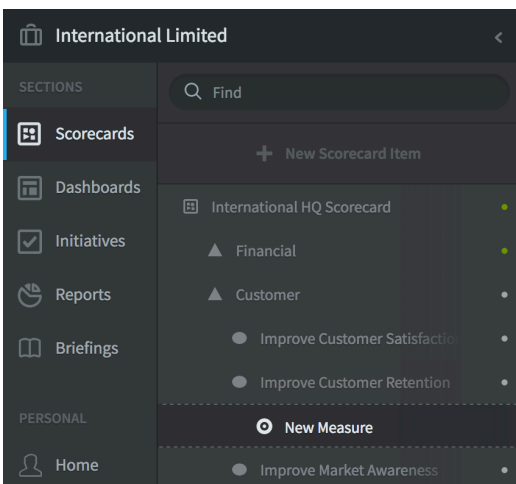
In this example we have selected the objective **Improve Customer Retention** in the International Limited Scorecard



Linking Metrics (Objects) - 2



Click on **Edit** at the bottom of the menu list



Click on **+ New Scorecard Item** at the top of the menu list and a New Measure will appear under the object you have selected.

Note: If you originally selected a Perspective then a New Objective would appear, If you selected a Scorecard a New Perspective would appear. This will be changed in the next step

In the **Create Measure** panel click on **Linked Item** from the drop-down list under **Type**.

The panel will change to a Create Linked Item Panel.



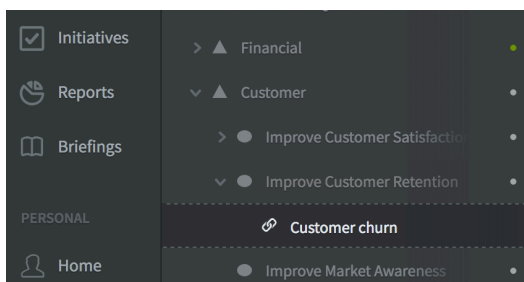
Linking Metrics (Objects) - 3

The screenshot shows the 'Create Linked Item' form. At the top, there are tabs for 'Overview' and 'Measures', and buttons for 'Edit' and a date selector 'December 2016'. The form is divided into several sections:

- Name:** A text field containing 'Customer churn' with a red circle '3' next to it.
- Type:** A dropdown menu set to 'Linked Item'.
- Description:** A large text area.
- Advanced Options:** A button.
- CHOOSE SOURCE ITEM:** A section with two search bars and two lists of items. The left list shows a hierarchy: International Limited, Financial, Marketing (highlighted with a red circle '1'), Sales, Operations, Customer Help Desk, Information Technology, Human Resources, and Commercial. The right list shows a hierarchy: Marketing, Increase Brand Awareness, Increase Lead Generation, and Improve Customer Retention (expanded to show 'Customer churn' highlighted with a red circle '2', 'On-site contact days', and 'Customer Satisfaction').
- USE FROM SOURCE ITEM:** A section with four checkboxes: 'Name and Description' (checked), 'Notes' (checked), 'Owners' (checked), and 'Tags' (checked). A red circle '4' is next to the 'Notes' checkbox. There is also a 'Related Items' checkbox.
- Buttons:** 'Cancel' and 'Create' buttons at the bottom right, with a red circle '5' next to the 'Create' button.

Do the following:

1. Click on the scorecard where the linked object resides in the left hand list
2. Drill down and Click on the actual linked object in the right hand list
3. The name will appear. You can change it if you need to
4. Select which attributes you would like to appear with the linked object
5. Click on the blue Create button



The new linked object and its attributes will appear in the destination Scorecard as a Linked Object.

Note: It will impact the scorecard scores