GETTING STARTEDWith Scoreboard V3

A STEP BY STEP GUIDE

(i) Logging In

This guide will help you get started with the application. **It does not cover all of the functionality.** Go to the last page for information about additional help.

Use the link in the e-mail headed **Trial Access and Instructions** to reach the login panel. It will be in the format:

Username	
Password	
Intrafocus Demo 👻	
Login	

www.your-company-name.spiderstrategies.com

- Enter your Username and Password and click Login
- You may be asked to change your password at this stage

(i) Welcome Screen

On entry to the application you will see a screen like this. To the left is the main menu and to the right some information about your activities, tasks and metrics. As you use the application, more information will appear.

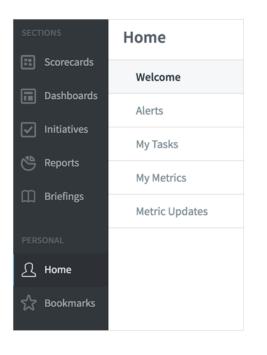
SECTIONS	Home			
Scorecards		NEW ALERTS		YOUR RESPONSIBILITIES
	Welcome	Marketing O Customer Satifaction	18 hours ago	My Tasks You have 0 Tasks that haven't been completed.
Dashboards	Alerts 📵	Measure value is now 87% for October 2016		
Initiatives	My Tasks	Show All Alerts		Measures I Own You own 4 Measures.
Reports	My Measures			Measures I Update You update 3 Measures.
Briefings	Measure Updates			
PERSONAL				
री Home 🕚				
School Bookmarks				
¢ •				

Your trial system has been populated with some Sample data:

- Scorecard
- Dashboard
- Initiative
- Report
- Briefing Book

Go to the Navigation guide to see how to look at the sample data

Before navigating around the application you need to know how information is created and stored.



In the main menu to the far left you will see a list of the Object types that can be created:

- Scorecards
- Dashboards
- Initiatives
- Reports
- Briefings

These objects are called Sections

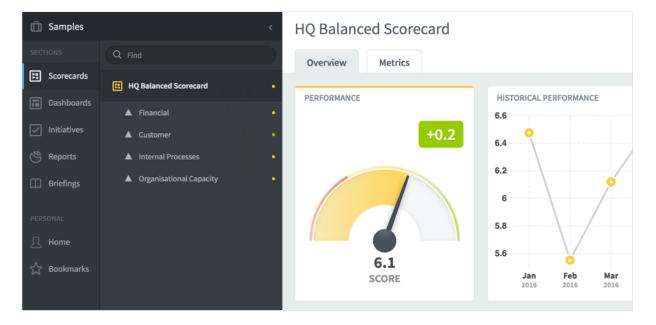
The **Sections** are grouped together in containers called **Organisations**. So for example you could have the following:

Organisation	Section	Data
Sales	Scorecard Dashboards Initiatives Reports	Objectives/Metrics Strategy Map Tasks/Actions Spreadsheets
Marketing	Scorecard Dashboards Initiatives	Objectives/Metrics Strategy Map Tasks/Actions
Financial	Scorecard Dashboards Reports	Objectives/Metrics Strategy Map Spreadsheets

You can view a list of **Organisations** by clicking on one of the **Sections** (for example Scorecards) and then on the small **Briefcase** icon at the very top-left of the screen. The Organisation list will be revealed:

Q Find	Select	NEW ALERTS
International Limited		NEWALENIS
O Department 1		No New Alerts
O Department 2		
Samples		

Click on Samples to highlight it and then the blue Select button

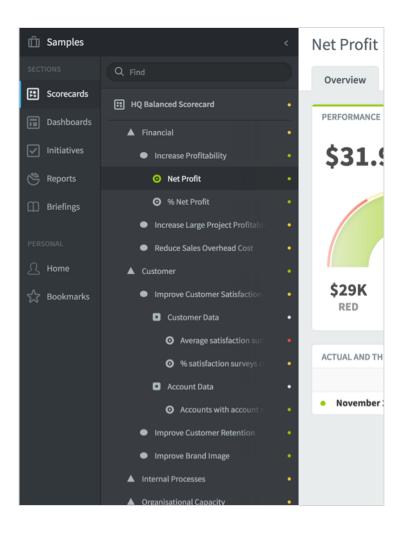


The Scorecard for Samples will be revealed:

Note: there is a blue vertical stripe by the word **Scorecards** indicating you are in the Scorecards section.



The second menu that appears is the Scorecard menu (you selected Scorecards, it is highlighted in the main menu and has a blue stripe to the far left). Click on the items to reveal the elements of the Scorecard:



A scorecard can contain any number of the following :

- Perspectives
- Objectives
- Generic Areas
- Measures

Each has it's own icon.

By clicking on each element, the current position gauge, history, related items, data and notes appear in the right-hand panel.

Very Important: Your Briefcase contains and Organisations which contain Scorecards, Dashboards, Initiatives, Reports and Briefings.

To look at other Organisations you need to click on the Briefcase icon (topleft) to reveal the Organisation List.

This is a key navigational function of the application. You will be creating many **Organisations** over time.

Click on **Dashboards**. You will see that this list is considerably smaller than the Scorecard list. Select each Dashboard in turn

📋 Samples	¢	Strategy Map
SECTIONS	Q Find	Overvlew Edit November 2016 ~
Et Scorecards	Strategy Map	
Dashboards	KPI Overview	Vision: Transforming society through the provision of ultra-high speed mobile information services
 Initiatives 	🖩 KPI Report	
🕒 Reports		Mission: The number one provider of ultra-high speed mobile networks and content to the United Kingdom
Briefings		Financial
PERSONAL		Produce Sales
요 Home		Overhead Cost Profitability Large Project Profitability
었 Bookmarks		
		Customer Customer Retention
		Internal Processes
		Organisational Capacity Improve Knowledge Base Improve staff skills Days
¢ ,	Y 🖷 Expand All 🕜 Edit →	

When you have finished looking at Dashboards, do the following:

- Click on Initiatives to look at the initiatives,
- click on Reports to look at the reports,
- click on **Briefings** to look at the briefings.

You have now looked at everything contained within the **Samples** organisation and it is time to build you own set of Scorecards, Dashboards, Initiatives, Reports and Briefings.

You must start with an Organisation and then add a Scorecard

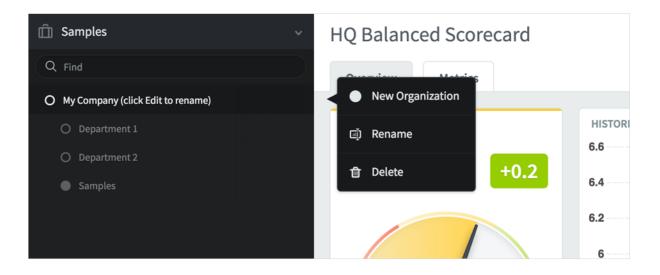
(i) Add an Organisation

First click on **Scorecards** and then on the **Briefcase** icon (top left) to revel the **Organisation** list. Highlight **My Company**:

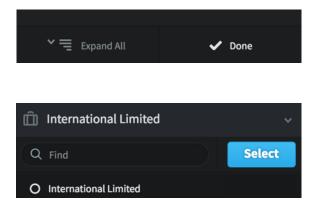


Click on Edit at the bottom of the screen

A pop-out menu will appear inviting you to create a new **Organisation**, Rename the highlighted organisation or Delete the highlighted organisation:



Click on Rename and change the name from My Company to the name of your company or organisation. (In this example we will change the name to International Limited)

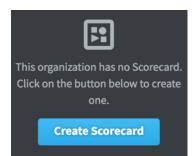


Click **Done** at the bottom of the screen and then immediately click the blue **Select** button at the top of the screen.

Your company name will appear and you will be asked to create a scorecard

(i) Create a Scorecard

Click on the blue Create Scorecard button, a Create Scorecard dialogue box will appear.



Create Scorecard
Name
HQ Scorecard
Description
This is the overall Scorecard for International Limited and is used to provide a company overview by linking to other scorecards
Tags
HQ Scorecard overview
Cancel

Add the name of the scorecard (we have called this one HQ Scorecard) and add a description.

You can optionally add search Tags that can be used at a later date to search for this scorecard.

Click on the blue **Create** button to create the scorecard.

The Scorecard structure will be created as below. Please note, at the moment it contains no data - this will be derived from your Metrics at a later date:

📋 International	Limited <	HQ Scorecard										会	0 b·
SECTIONS	Q, Find	Overview Metrics									Edit	November 201	5 - < >
	HQ Scorecard •	PERFORMANCE	HISTORICAL PE	RFORMANCE									~ 0
 Initiatives Reports 		Not updated for this period											
		•	Jan 2016	Feb 2016	Mar 2016	Apr 2016	May 2016	Jun 2016	Jul 2016	Aug 2016	Sep 2016	Oct 2016	Nov 2016
		DATA USED IN CALCULATIONS						RELATED	TEMS				+ Add
		This sc	corecard item has n	o descendants						No	related items		

You can add the following items to a Scorecard:

- Perspectives
- Generic Items (containers)
- Objectives
- Metrics

If you **only** want to add Metrics to your scorecard then miss this section and go straight to **Creating Metrics**

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.

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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.

(i) Adding Perspectives/Objectives

The application will take care of scoring each Metric and will roll up the score values to Objectives, Generics and Perspectives.

International Limited <
 Scorecards
 HQ Scorecard
 Dashboards
 Initiatives
 Initiatives
 International Limited
 Edit
 Scorecards
 Find
 Scorecards
 Find
 International Limited
 Scorecards
 Find
 Scorecards
 HQ Scorecard Item
 HQ Scorecard
 HQ Scorecard

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:

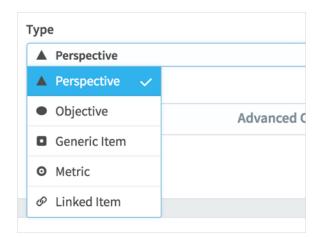
International	Limited <	Create Perspective		
SECTIONS	Q. Find	Overview Metrics		Edit November 2016 👻 < >
Scorecards	+ New Scorecard Item			
Dashboards	-	Name	Туре	
✓ Initiatives	HQ Scorecard		Perspective	*
Reports	New Perspective	Description	Advanc	ted Options
Briefings				
PERSONAL				
요 Home		OWNERS	•	
었 Bookmarks		Add Owner		

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.



(i) Adding Perspectives/Objectives

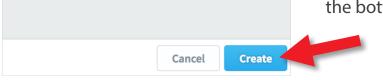
To illustrate this process we will add a **Perspective** called the Financial Perspective and an **Objective** called Improve Profit



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



International Limited
<</td>

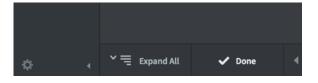
SECTIONS
Q Find

Scorecards
HQ Scorecard

Dashboards
▲ Financial

Initiatives
● Improve Profit

Reports



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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(i) Arranging a Scorecard

<u> </u> Internationa	national Limited						
SECTIONS	Q Find	D					
😫 Scorecards	HQ Scorecard						
Dashboards	▲ Financial						
Initiatives	Improve Profit	•					
🐣 Reports	• Profit	•					
Briefings	▲ Customer	•					
	Improve Customer Satisfaction	•					
	• Customer Satisfaction Score	•					
<u> </u>	Improve Brand Awareness	•					
S Bookmarks	Internal Processes	•					
	Organisational Capacity	•					
	Improve Knowledge and Skills	•					
	Improve Content Genetration	•					

When you have added some items to your Scorecard it might 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.

<u> </u> Internationa	l Limited	<
SECTIONS	Q Find	D
Scorecards	+ New Scorecard Item	
Dashboards	HQ Scorecard	
Initiatives	▲ Financial	
🐣 Reports		•
Briefings		•
PERSONAL	Customer	•
्र Home	Improve Brand Awareness	•
	Improve Customer Satisfaction	•
😽 Bookmarks	O % Customer Satisfaction S	•
	Internal Processes	•
	Organisational Capacity	•
		•
	Improve Content Genetration	•

Click Edit at the bottom of the menu list.

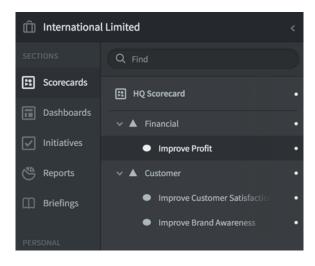
Drag and drop the items in the list to the correct places.

In this example the objects have been re-ordered and tiered to create the correct scorecard relationship

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

Metrics can appear under a Scorecard, Perspective, Objective or Generic Area.

Metrics are the 'engine' of the scorecard. When you add actual values to metrics, a score is generated and the whole scorecard will 'colour-up'.



Click on the scorecard item under which you want the Metric to appear.

In our example we have highlighted Improve Profit and we will be adding the Metric Profit.

Click on Edit at the bottom of the menu list - you will be taken into edit mode and the Edit Objective dialogue will appear on the right

Click on the **+ New Scorecard Item** button and the Metric dialogue will appear together with a New Metric under the Objective:

<u> </u> Internationa	l Limited <	Create Metric	
	Q Find	Overview Metrics	
Scorecards			
DashboardsInitiatives	HQ Scorecard	Name	
Reports	 ▲ Financial ● Improve Profit 		
Briefings	O New Metric		
PERSONAL	Customer Improve Customer Satisfaction		
Bookmarks	Improve Brand Awareness		Cale
		K Goal/Red Flag	Мо
		Aggregation Type	Deci
		Σ Sum 👻	Def

You do not have to provide all of the details at this stage, but there are a few things you need to add, follow this sequence:

Create Metric						
Overview Metrics				Edit	November 2016 👻	< >
Name Description		Type Ø Metric	2 Advar	nced Options		•
METRIC DETAILS Scoring Type Goal/Red Flag Aggregation Type	Calendar Monthly Decimal Precisi	5	Data Type	ver 6		•
ε sum 7	• Default		•			
SERIES						
Actual Value	Red Flag ✓ Manual Default Value	8	Goal Goal Goal Default Va			•
OWNERS						
Add Owner						
UPDATERS Add Updater						
					Cancel	

- 1. Give the metric a name this should be a label 3-5 words long
- 2. Select the Type this should be Metric
- 3. Provide a description this is optional but it is good practice to provide a description which includes where the metric data can be found.
- 4. Select the Scoring Type the scoring type can be one of eleven types. On most occasions this will be Goal/Red Flag (Red/Amber/Green)
- 5. Select the Calendar this relates to the frequency the data is collected, normally monthly for general management reporting.



- 6. Select the Data Type the application can handle Currency, Percentage, Numeric and Yes/No data
- 7. Select the Aggregation Type this tells the application what to do with actual values when looking at them using a calendar other than the frequency collected calendar previously selected.

For example, for a **Currency** the aggregation type is normally **Sum**. When looking at monthly data with a yearly calendar, you want the application to sum the months.

For a **Percentage** the aggregation type is normally **Average**. When looking at monthly data using a yearly calendar, you want the application to take an average over the months.

Thresholds: You need to tell the application when you expect a Metric to turn red (from amber) and green (from amber)

- 8. Add the Red Flag threshold. For example, if the metric is deemed to be in the Red below \$25,000, the the Red Flag value is \$25,000
- 9. Add the Green Flag threshold, this is usually the target
- 10. Optionally add the Owner of the Metric (this can be done later)
- 11. Optionally add the Updater of the Metric (this can be done later)

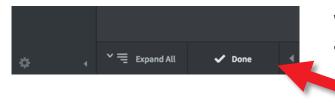
Very Important:

• When you have entered all of the data Click the blue Create button

You will be given the opportunity to add another Metric, a blank Create Metric screen will appear. Add as many metrics as you need.



Once you have added all of your metrics, you can come out of Edit mode



When you have finished, click **Done** at the bottom of the menu list

The resulting Metric should look something like this:

Profit										4	0 E.
Overview Metrics								Edit	Nov	ember 2016	~ < >
PERFORMANCE	HISTORICAL	PERFORMANC	E								~ \$
Not updated for this period											
\$25K - \$28K RED SCORE GOAL	Jan	Feb	Mar	Apr	Мау	Jun	Jul	Aug	Sep	Oct	Nov
RED SCORE GOAL	2016	2016	2016	2016	2016	2016	2016	2016	2016	2016	2016
ACTUAL AND THRESHOLD VALUES						1	Edit	RELATED ITEM	IS		+ Add
	S	CORE	ACTUA		RED	GOAL		No related items			
November 2016					\$25K \$28K			/ related fiterins			

You can see in this example the Metric is called Profit and the thresholds have been set a \$25k for red and \$28k for green.

You can add more Metrics by going back to the beginning and repeating the process.

The next step is to add some Actual Values to the Metrics

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(i) Metrics Details - Cheatsheet

These parameters appear in the Metric Details and Series panels:

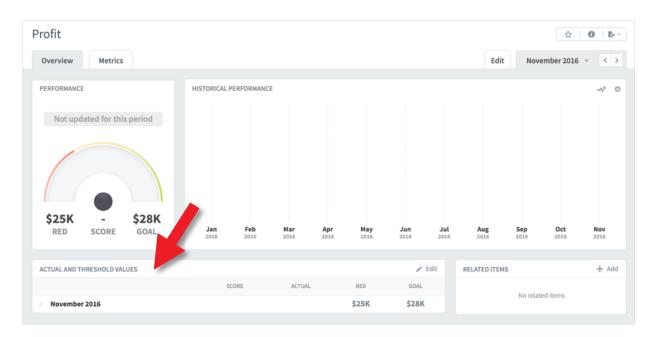
- Scoring Type: usually Goal/Red Flag, select from the list
- Calendar: Monthly, Quarterly, Yearly or user defined
- Data Type: select from one of the three options:
 - Number numerical data, e.g. number of call received
 - Percentage any percentage value, e.g. %Net Profit
 - Currency a number expressed in currency e.g. USD or GPB
- Aggregation Type: How to aggregate for a different calendar view
 - *Sum* data added monthly will be summed up when viewed quarterly or yearly e.g. Revenue is usually defined as Sum
 - Average data that is added monthly will be averaged when viewed quarterly or yearly e.g. %Net Profit is usually averaged
 - Last Value the last value added will be used when viewed quarterly or yearly e.g. Cumulative Sales is usually set to Last Value
- Decimal Precision: The default can be set in Administration
 - If you require anything other than the default, the decimal precision can be set here with a numerical value e.g. 0, 1, 2 etc.
- Actual Value: Manual or Calculated
 - It is possible to use a calculation, this is covered in advanced functions
- Red Flag and Goal: When measures turns Red, Amber or Green
 - The application bases all of its calculations on this setting. You need to determine when a performance measure is good, indifferent or bad, that is; Green, Amber or Red. For the Goal Red Flag measure this requires two values:
 - *Red Flag:* when the performance measure turns Red
 - Goal: when the performance measure turns Green

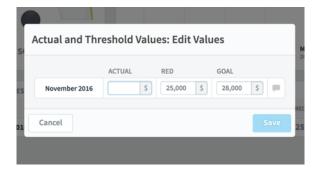
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Adding Actual Values - 1

There are several ways to add **Actual Values** to the system. This can also be automated, for more information automation read the **Automated Adding Actual Values** guide.

The simplest way to add Actual Values is to go direct to the Metric itself. In the Overview there is an area called **Actual and Threshold Values**:





Click on the **Edit** icon in Actual and Threshold Values and a pop-out dialogue will appear.

Add the Actual Value for the month stated in the pop-out and click **Save**

The value will now appear in the chart.

Note: If you have permissions to do so, you can also change the threshold values - this only changes the threshold value for the specific month. It does not change the default values.



Adding Actual Values - 2

The second way to add actual values requires that a metric has been assigned an **Updater**. Read the Owner and Updaters guide to see how to assign an Updater to a Metric.

If you have been assigned as an Updater you can click on the Home button in the main menu and on the right hand side of the screen you will see the following, click on **Metrics I Update**:

YOUR RESPONSIBILITIES	5		
My Tasks You have 0 Tasks that have	n't been completed.		
Metrics I Own You own 0 Metrics.			
Metrics I Update You update 3 Metrics.			

All of the Metrics that have been assigned to you will appear in a list ready to be updated:

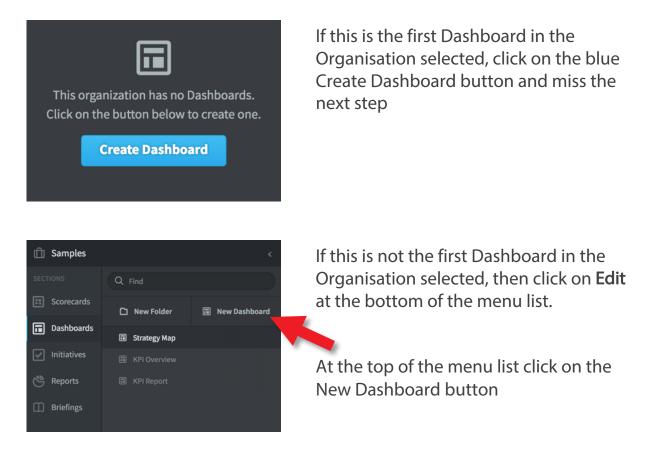
Metric Updates All Organization	ons 🔻			November 2016	* < >
METRIC	PERIOD	ACTUAL	THRESHOLDS	5	
SAMPLES					
Number of calls made	November 2016	470	450	500	=
Conversion rate	November 2016	41 %	30	% 40	%
<u>% templates used in sales process</u>	November 2016	77 %	60	% 75	%

In the example above, the thresholds have been shown, but they have a grey background. In this instance, the Updater has not been given permission to update threshold values, only Actual Values.



Dashboards - 1

Click on the Briefcase icon (top-left) and select the Organisation into which you want to place a Dashboard.



The Create Dashboard dialogue will appear. Give the Dashboard a name and click on Create, this will take you into Dashboard edit:

Financial Overview		
Overview	Edit	November 2016 👻 < >
Title Financial Overview		
G→ Move D Copy		Cancel Save
+ 0 0		[] Fullscreen
Add your first widget!		

Dashboards - 2

Dashboards are created by adding Widgets.

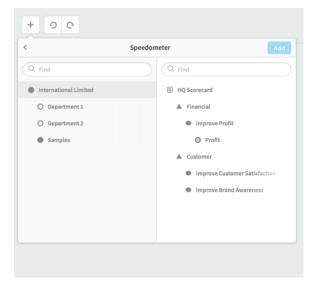
Financial Overview				
Overview				
Title				
Financial Overview				
G→ Move D Copy Delete				
+ O C Add Widget				
G Bubbles > widget!				
₽₽° Chart				
in Image				
← Speedometer >				

Click on the + button, the widget list will appear. You can add the following to a Dashboard:

- Bubbles
- Charts
- Images
- Speedometers

These items derive their data from the Scorecards you have previously created.

Click on Speedometer



The Scorecard structure appears. Open out your scorecard (or use Samples) and highlight the object you want to appear in the dashboard - click **Add**

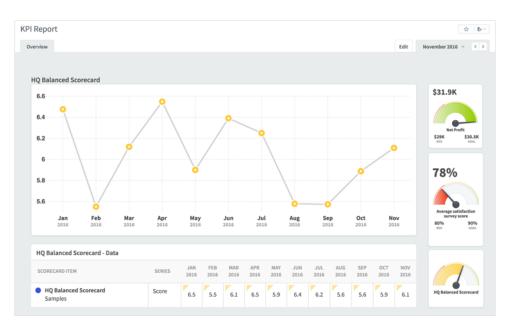
When you have added a few items click outside the dialogue box

Important Tip: Click Save at this point to save the items you have added

Dashboards - 3

Experiment yourself by adding different objects. When you have finished your Dashboard, click **Save** and then look at it by clicking on the **Overview** tab at the top of the page. Dashboards can be as complex or as simple as you like, here are two examples:







(i) Additional Help

There are many other Scoreboard guides and sources of information:

• Training Guides: <u>https://www.intrafocus.com/getting-started-guides/</u>

If you would like some help with your strategy of scorecards:

- Balanced Scorecard Courses: <u>Balanced Scorecard Training</u>
- Strategy Workshop Facilitation: On site three-day workshop
- QuickScore Product Training: <u>On-site one-day training</u>

If you have any questions at all, please do not hesitate to contact us. The best way to get in touch is e-mail: <u>helpdesk@intrafocus.com</u>

