GETTING STARTED

With Scoreboard V3
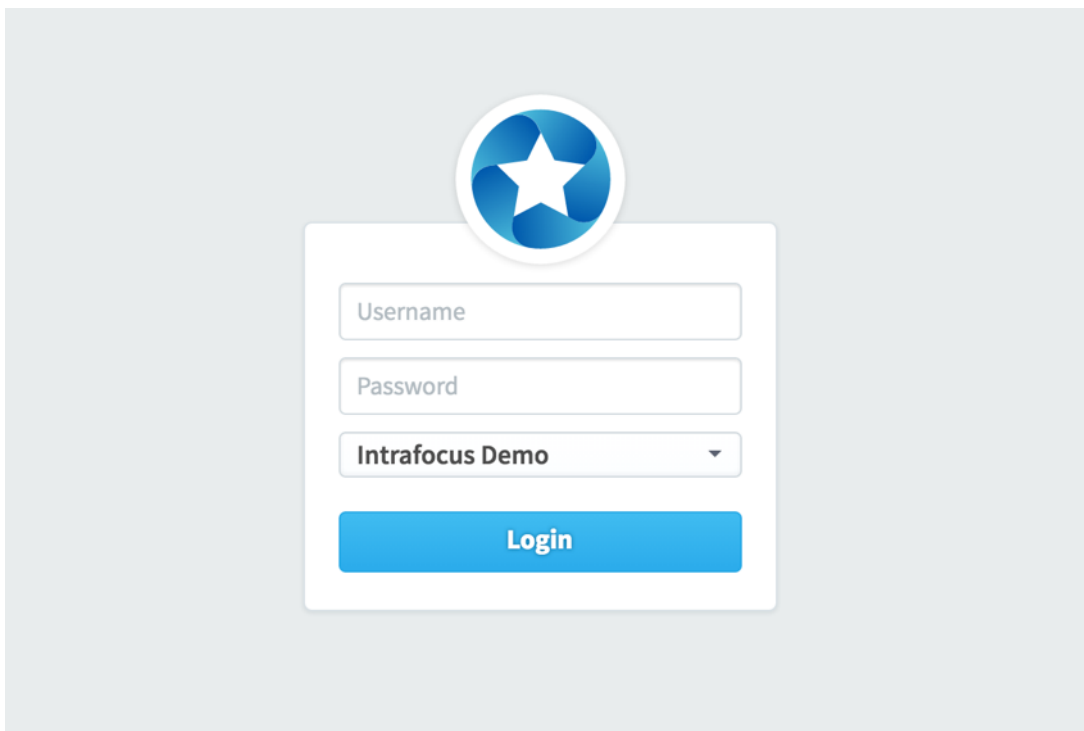
A STEP BY STEP GUIDE

(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:

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

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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.
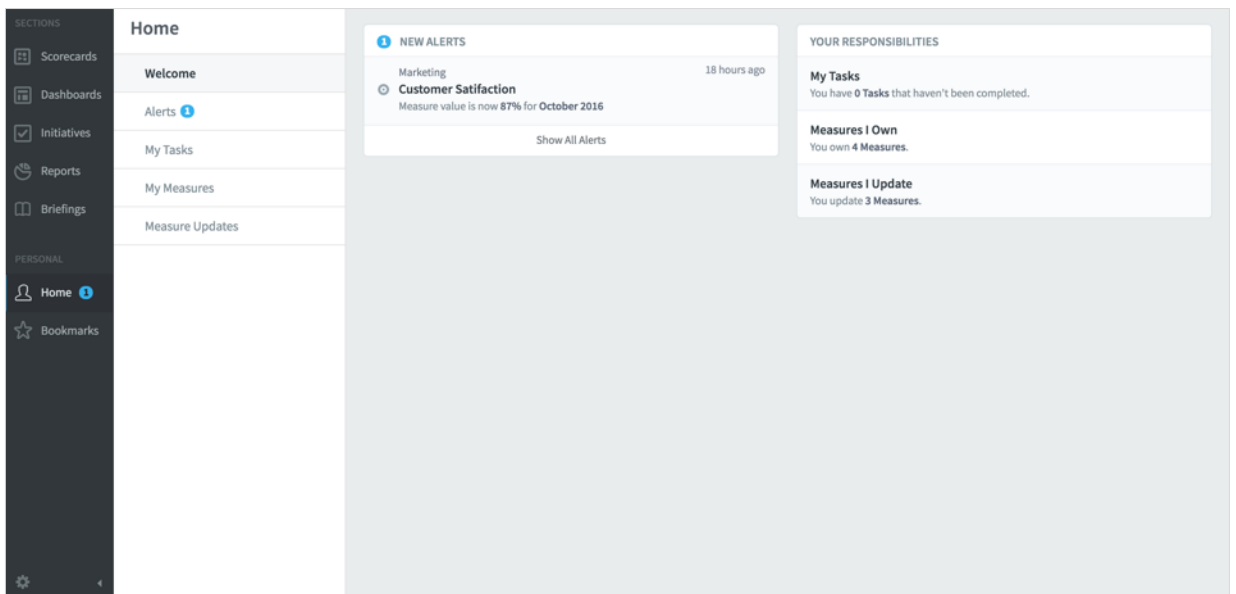
Your trial system has been populated with some **Sample** data:

- 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

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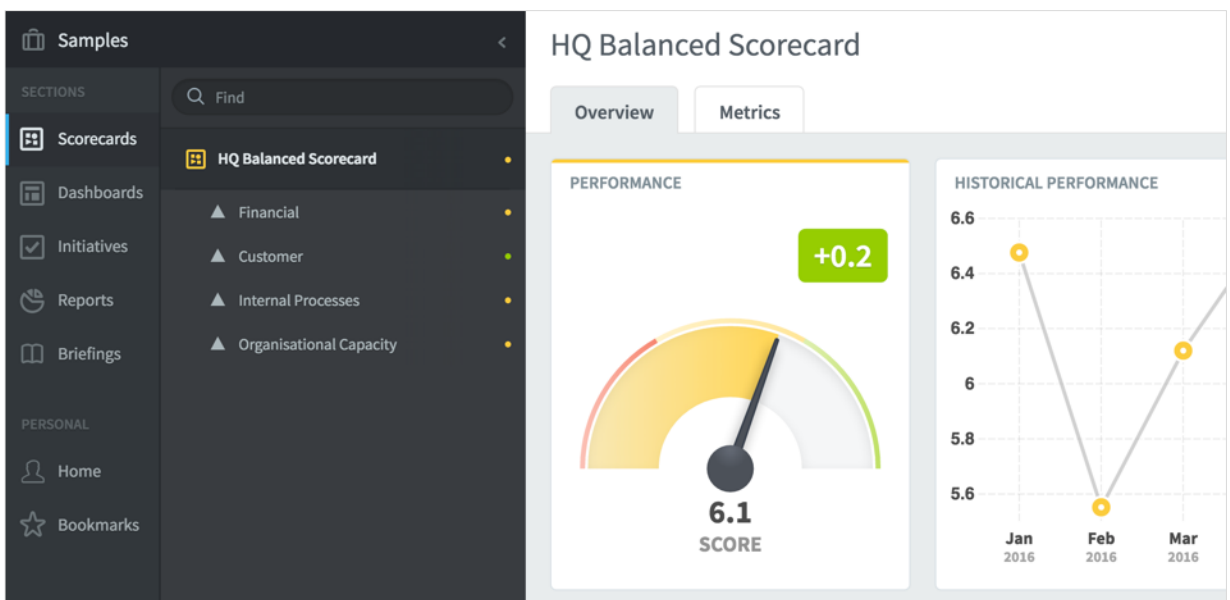
You can view a list of **Organisations** by clicking on one of the **Sections** (for example Scorecards) and then on the small **Briefcase** icon at the very top-left of the screen. The Organisation list will be revealed:
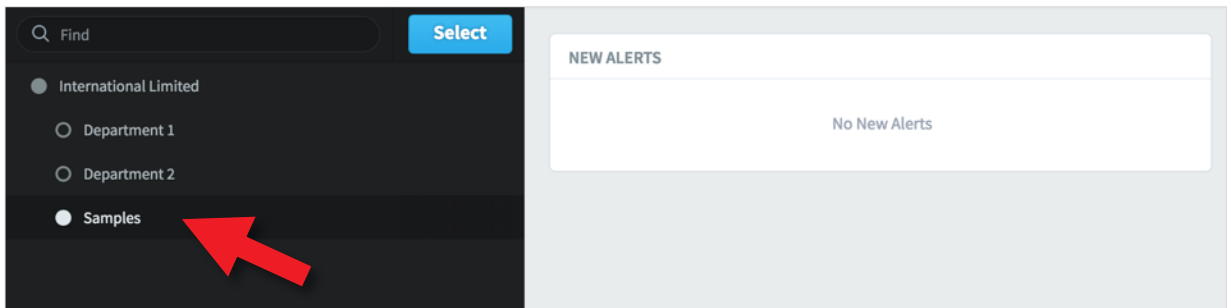
Click on **Samples** to highlight it and then the blue **Select** button

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.

Navigation - 3

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:
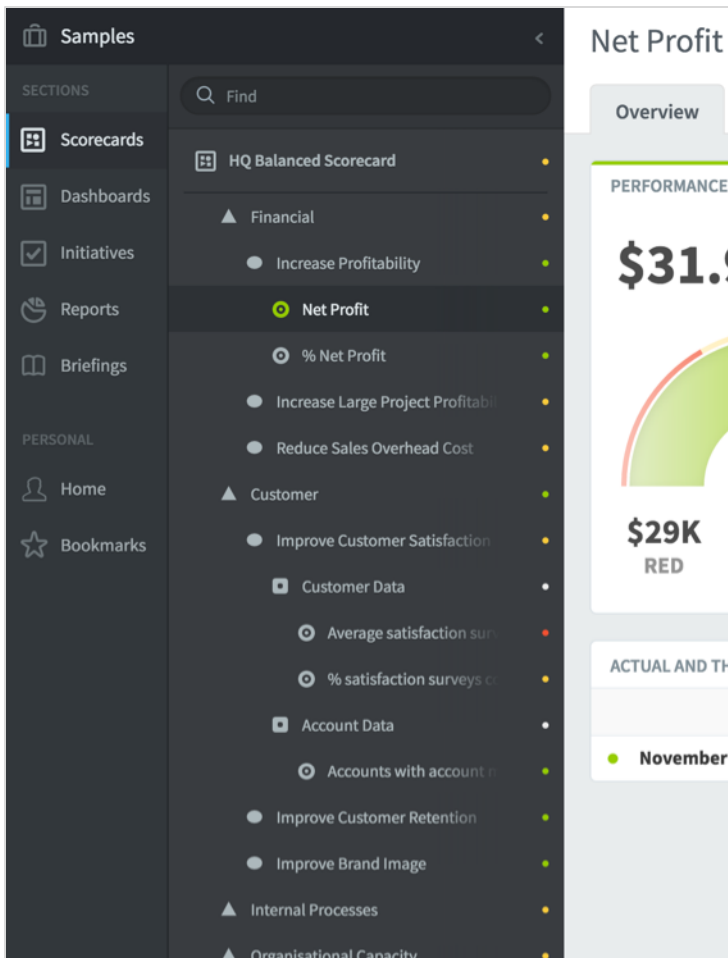
A scorecard can contain any number of the following :

• 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.
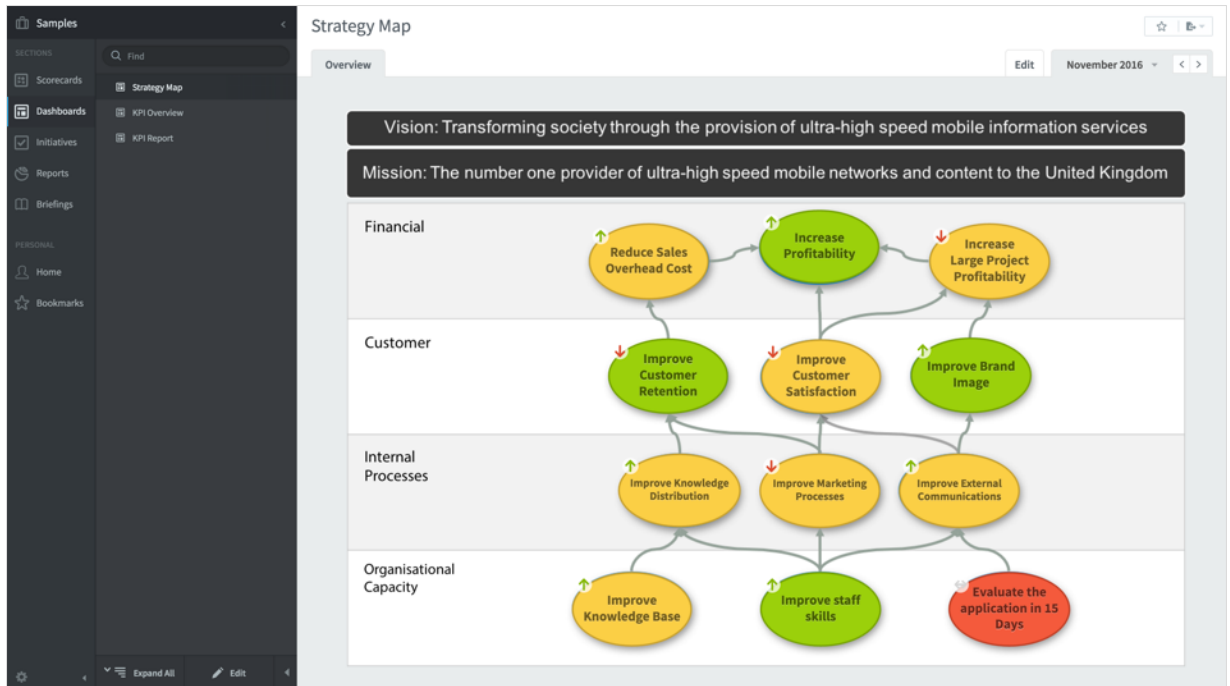
To look at other Organisations you need to click on the Briefcase icon (top-left) to reveal the Organisation List.

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

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

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**

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Add an Organisation

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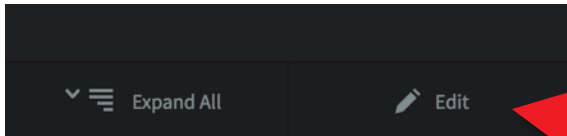

Click on Edit at the bottom of the screen

A pop-out menu will appear inviting you to create a new **Organisation**, Rename the highlighted organisation or Delete the highlighted organisation:
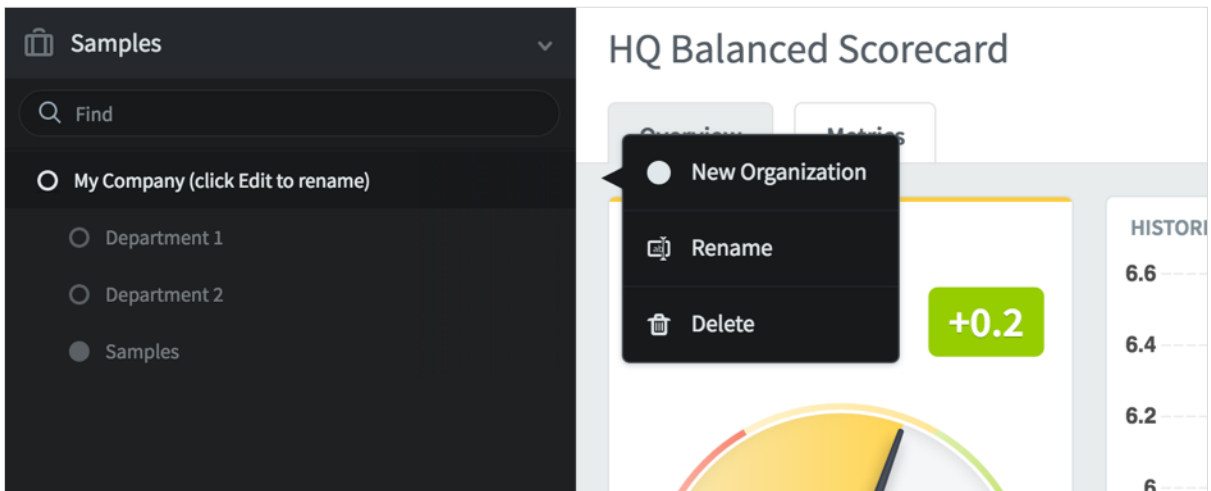
Click on Rename and change the name from My Company to the name of your company or organisation. (In this example we will change the name to International Limited)

Click **Done** at the bottom of the screen and then immediately click the blue **Select** button at the top of the screen.
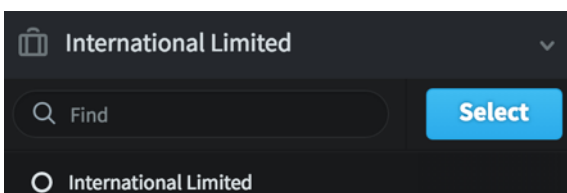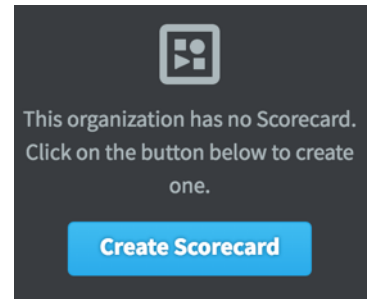
Your company name will appear and you will be asked to create a scorecard

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Create a Scorecard

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

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:
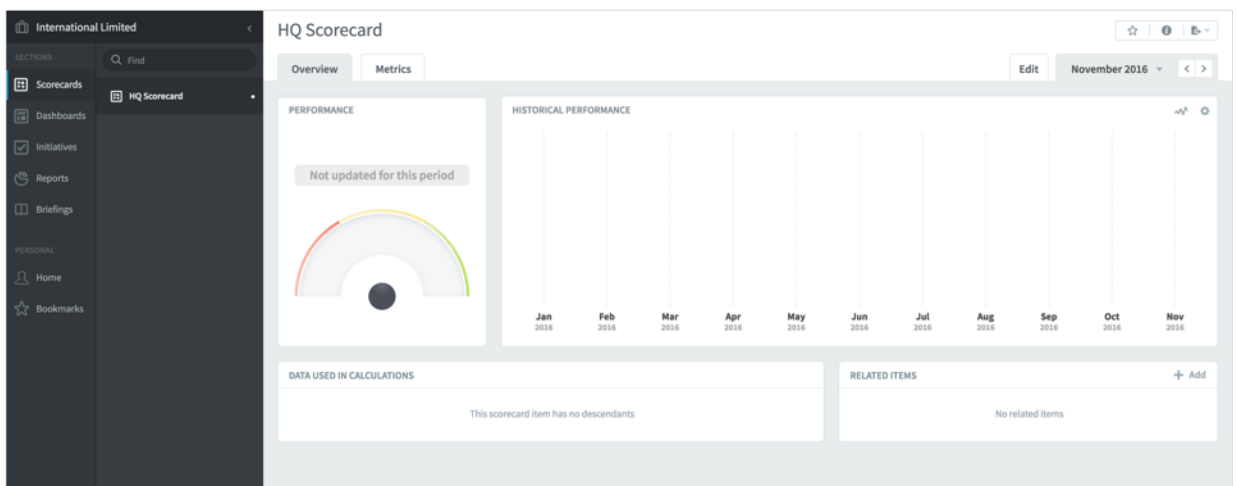
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You can add the following items to a Scorecard:

- 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 **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.

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
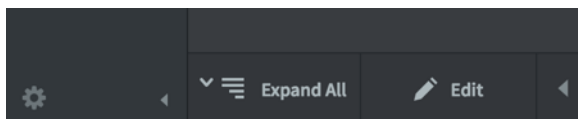   - Metric
      - Metric
  - Etc.
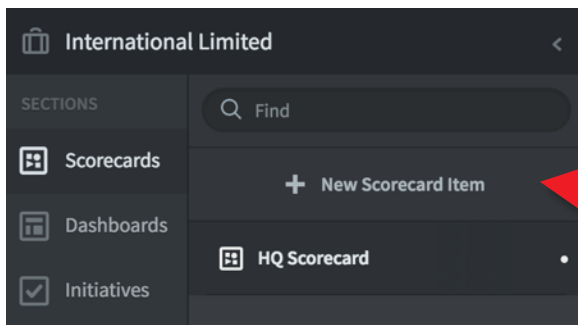
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Adding Perspectives/Objectives

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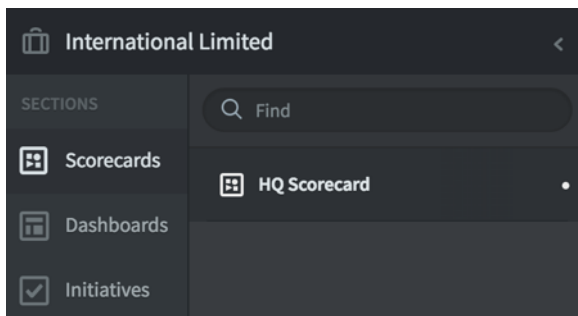
To add a Perspective, Objective or Generic container click on the Scorecard name (in our example HQ Scorecard) to highlight the Scorecard
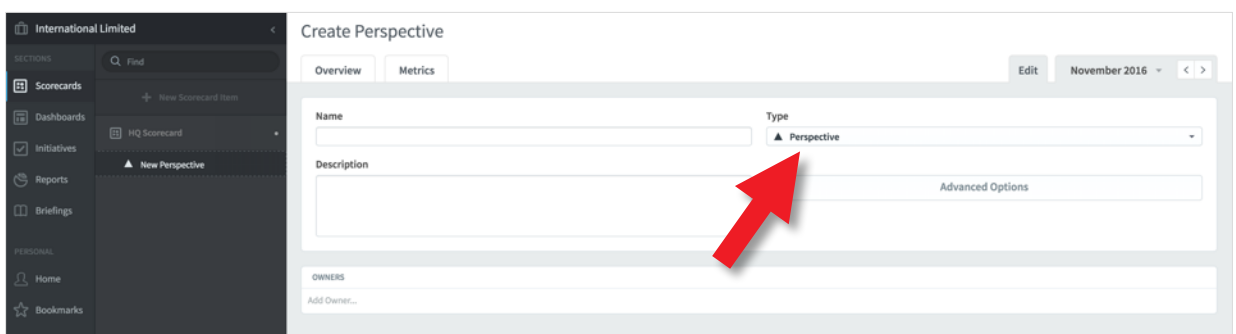

Click on Edit at the bottom of the Scorecard menu.

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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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

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.
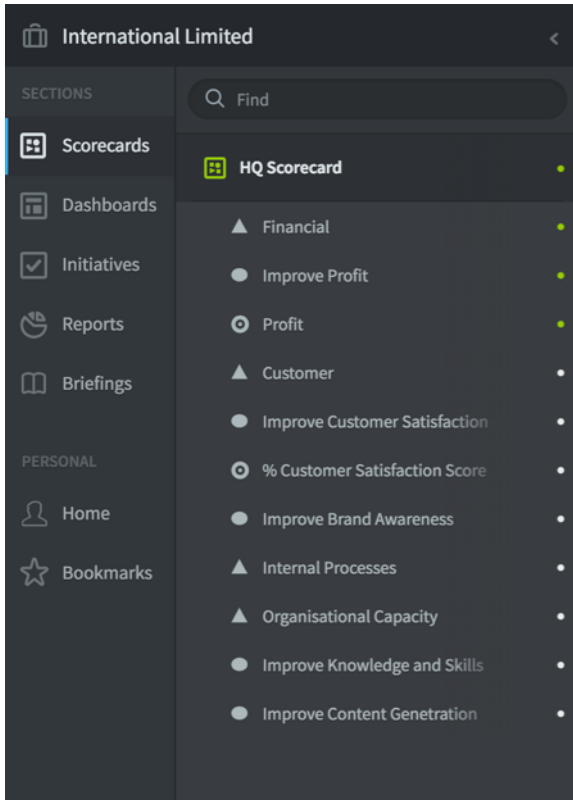
This time select Objective from the Type drop-down and give the Objective a name. We have called it **Improve Profit**

The Objective will appear in the list, click on Done at the bottom of the menu list

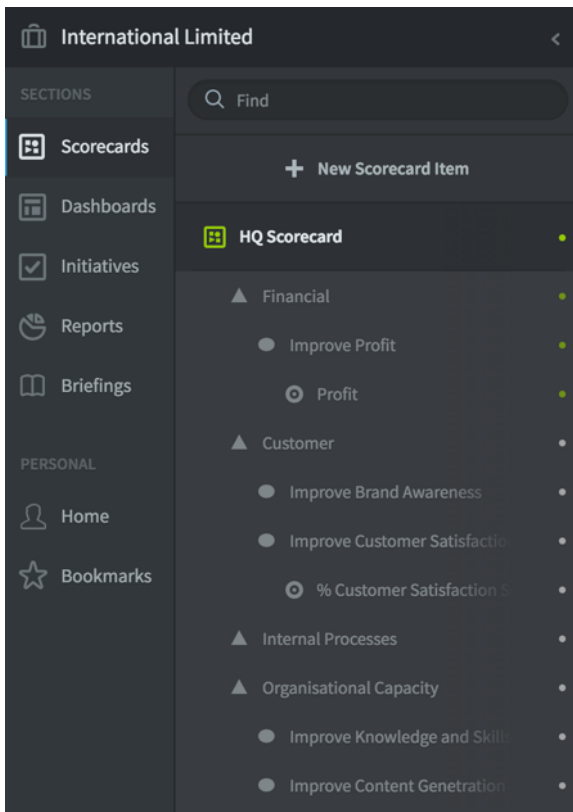intrafocus

Arranging a Scorecard

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.

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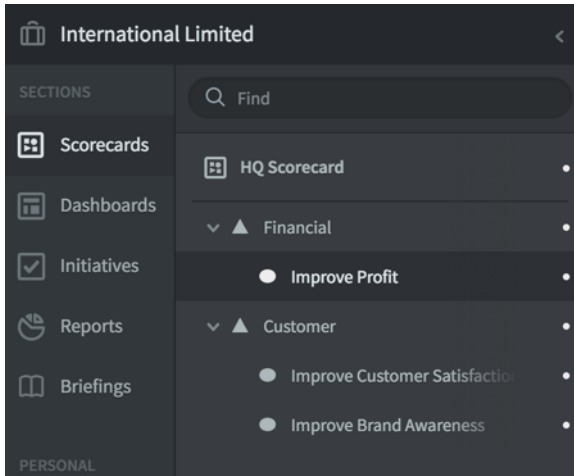
Click **Done** at the bottom of the menu list when you have finished

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Adding Metrics - 1

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:

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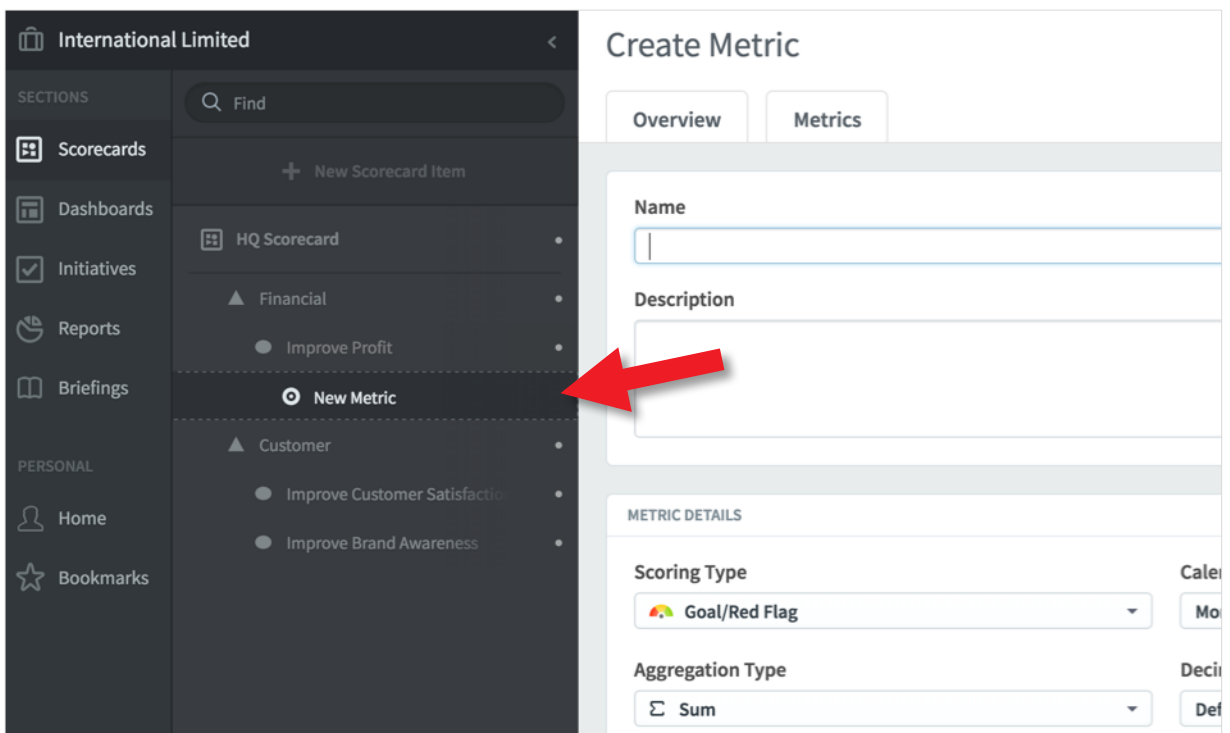
You do not have to provide all of the details at this stage, but there are a few things you need to add, follow this sequence:

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)
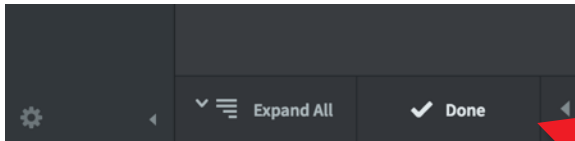
Very Important:

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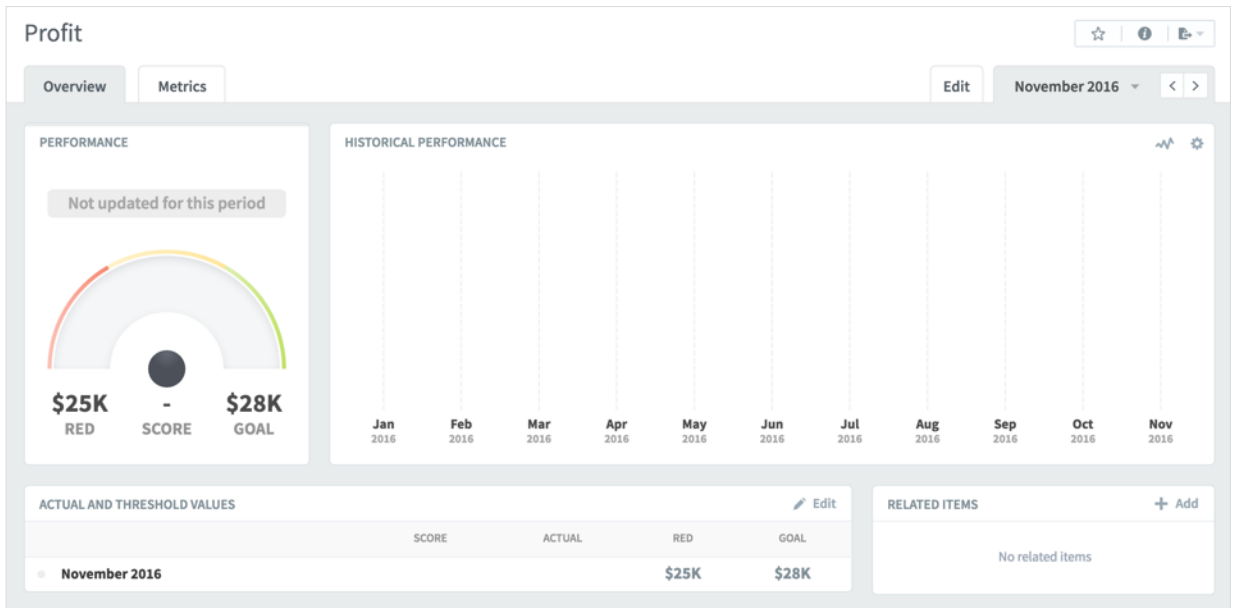
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Once you have added all of your metrics, you can come out of Edit mode

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

The resulting Metric should look something like this:

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

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

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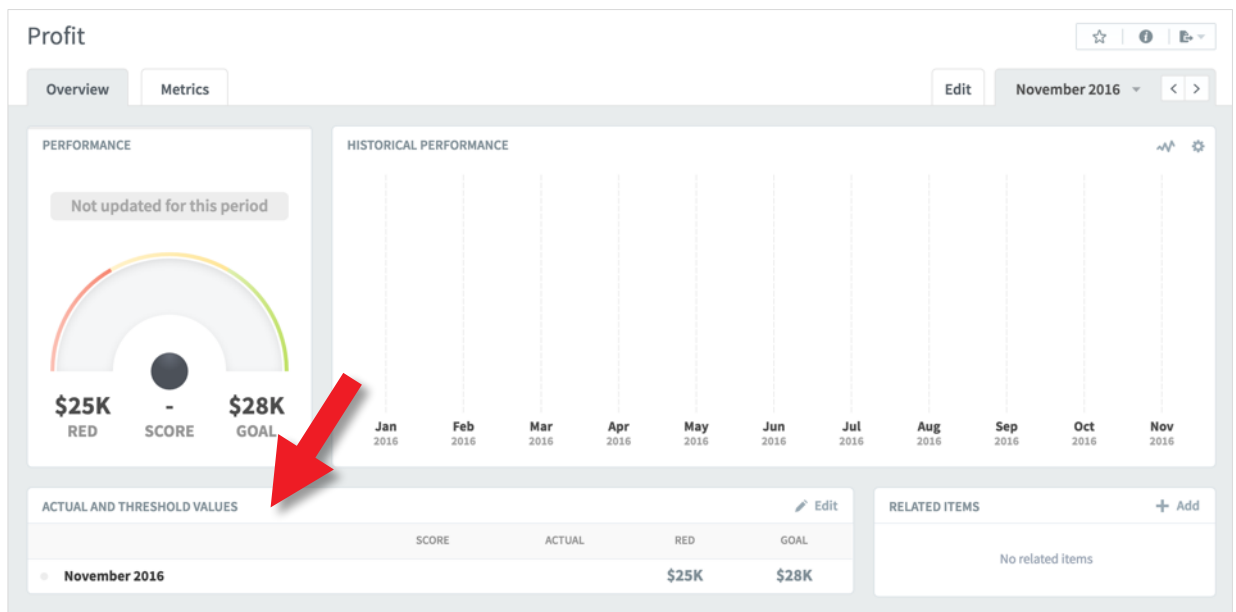
Click on the **Edit** icon in Actual and Threshold Values and a pop-out dialogue will appear.

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.

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**:

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

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.
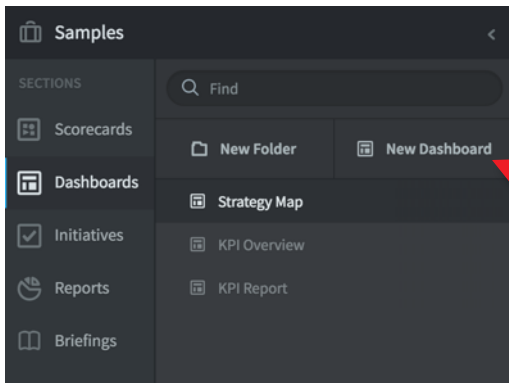
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Click on the Briefcase icon (top-left) and select the Organisation into which you want to place a Dashboard.
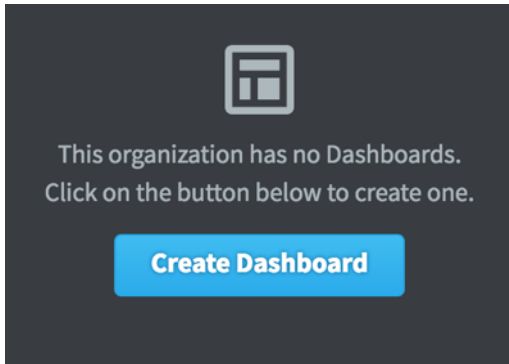
If this is the first Dashboard in the Organisation selected, click on the blue Create Dashboard button and miss the next step

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

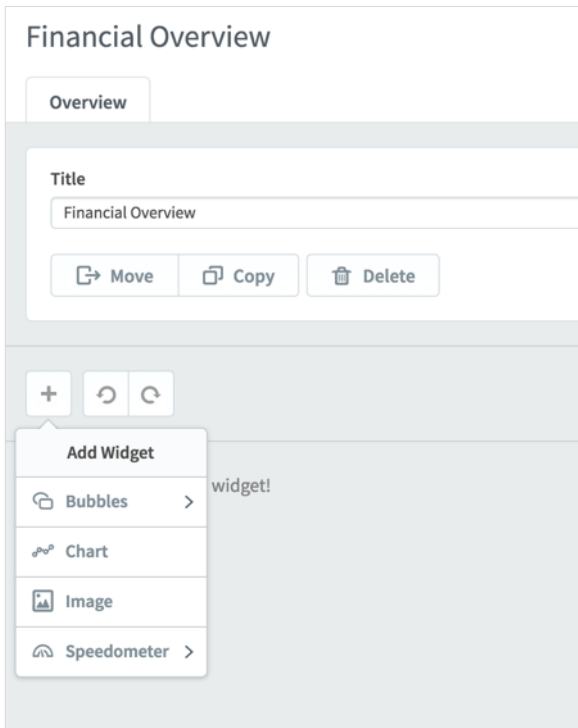At the top of the menu list click on the New Dashboard button

The Create Dashboard dialogue will appear. Give the Dashboard a name and click on Create, this will take you into Dashboard edit:
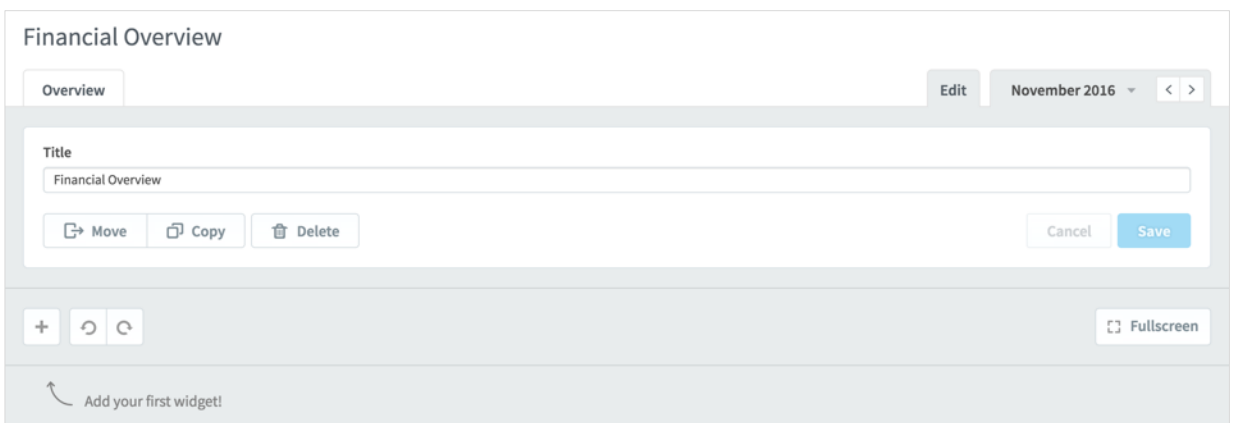
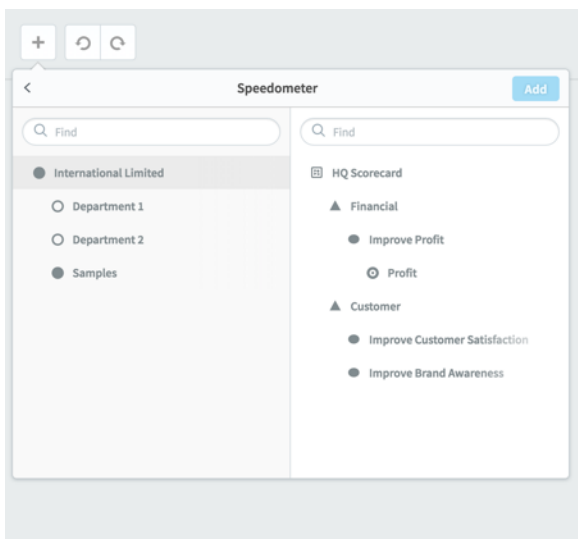Dashboards are created by adding **Widgets**.

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:

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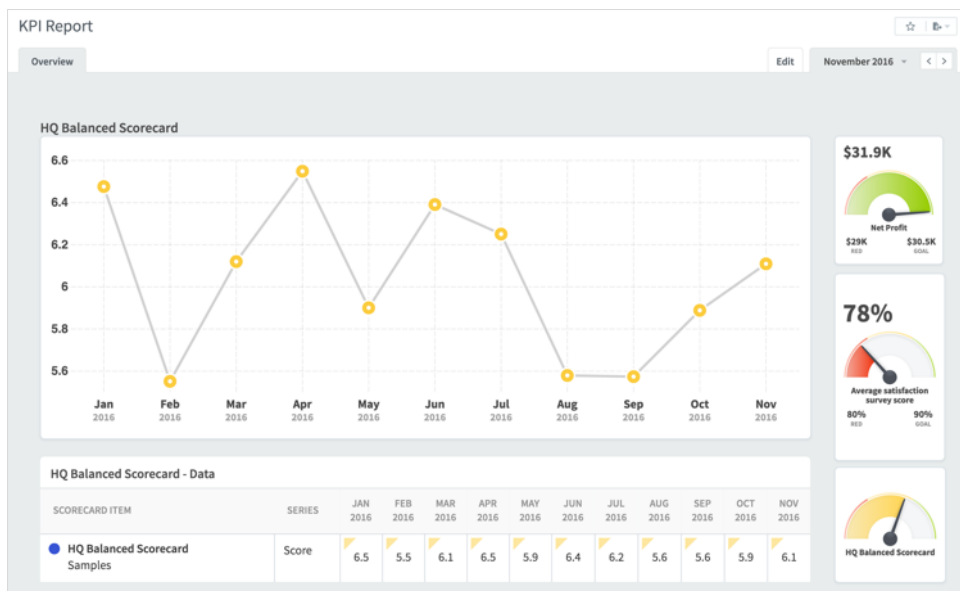
There are many other Scoreboard guides and sources of information:

- Training Guides: https://www.intrafocus.com/getting-started-guides/

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

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

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

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