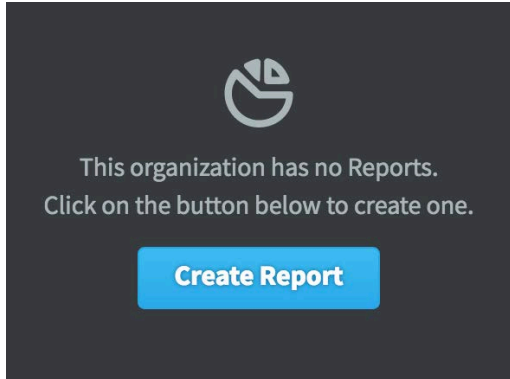


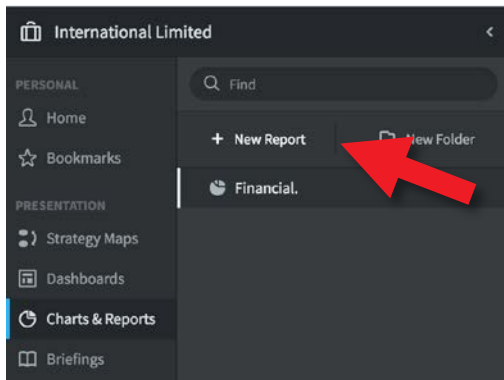


Building Charts & Reports - 1

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



If this is the first Chart & Report in the Organization selected, click on the blue **Create Report** button and miss the next step.



If this is not the first Report in the Organization selected, then click on the **+ New Report** button.



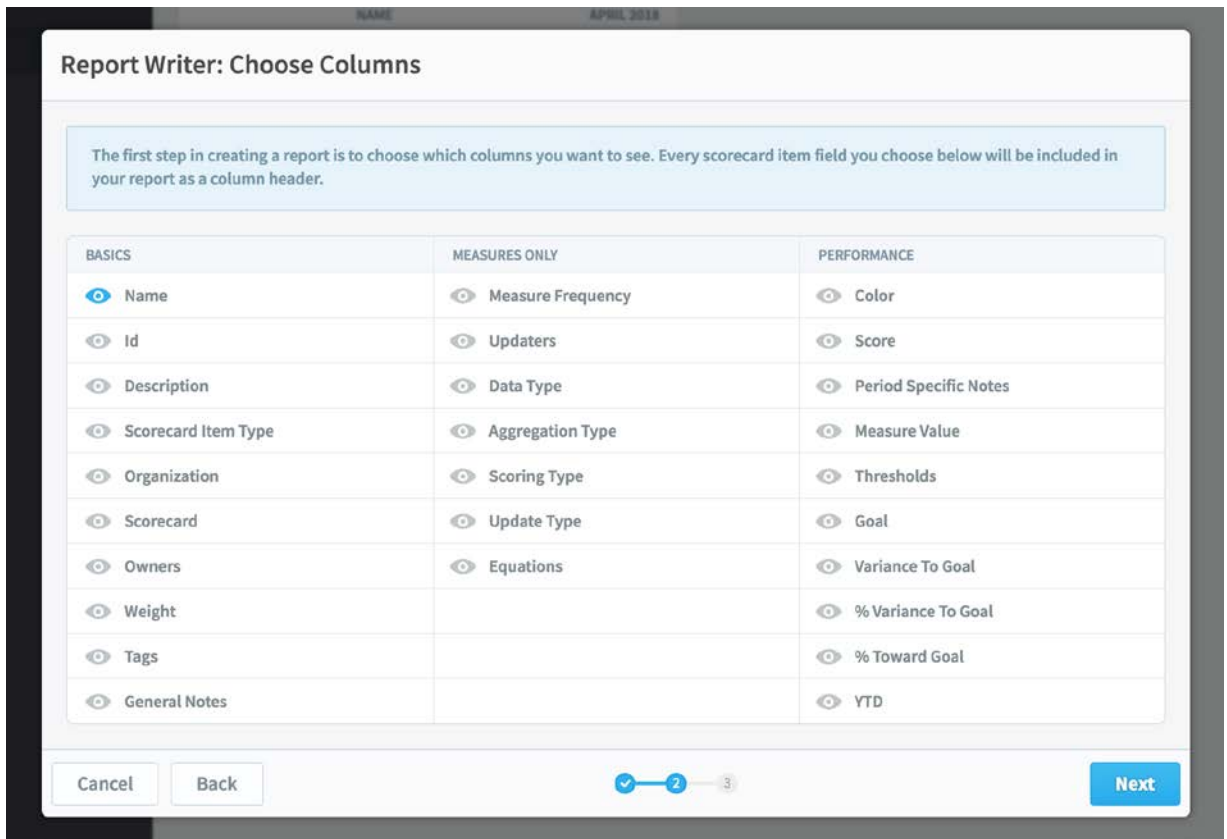
The **New Report** dialogue will appear.

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

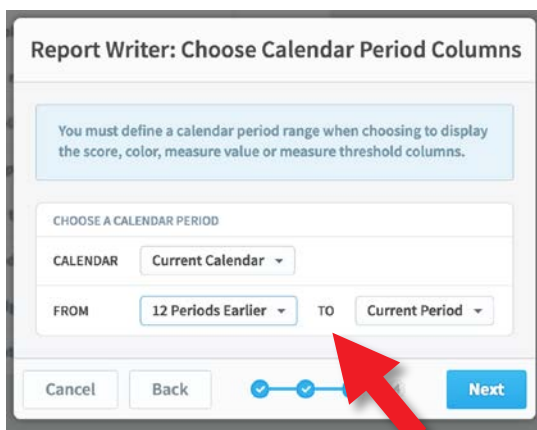
Click on **Report Writer**. The item will be highlighted, click **Next**



Building Charts & Reports - 2



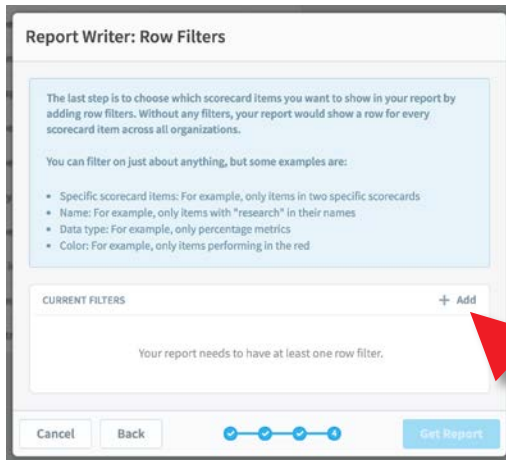
The **Choose Columns** dialogue will appear. (Note, the above example is from QuickScore, Scoreboard will use the term KPIs for Measures. For this example we will continue with QuickScore). **Name** has already been selected, select **Color** - to show the color threshold, **Measure Value** - to show the actual values and **YTD** - to show the Year to Date. Click **Next**



The Choose Calendar Period Columns dialogue will appear. Select the desired period to display. In this case we have selected 12 months up to the current period. Click **Next**

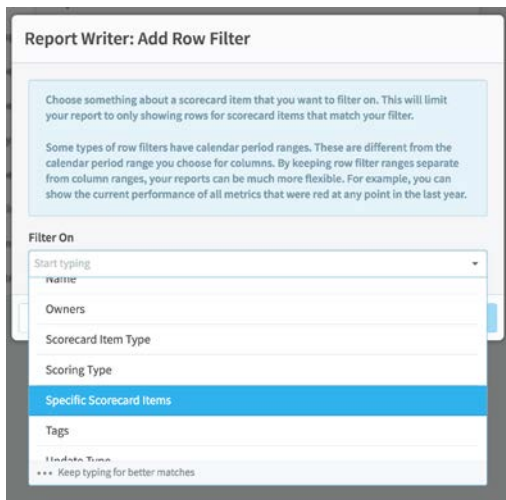


Building Charts & Reports - 3



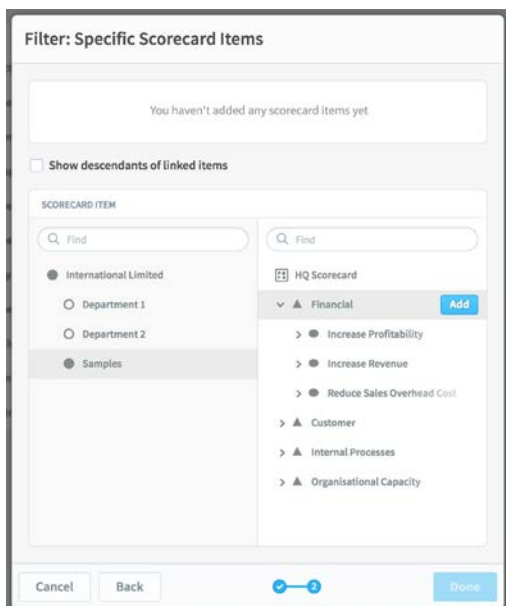
The **Row Filters** dialogue will appear. The application will allow you to select just about any set of rows you require for your report.

For this example we will keep things simple. Click on **+ Add**



The **Add Row Filter** dialogue will appear. Click on the Filter On drop-down menu and select **Specific Scorecard Items**. Click **Next**

This will reveal the familiar scorecard tree.



Find the area you in which you are interested. In this case we have selected Financial from the Samples organization. Click **Add**



Building Charts & Reports - 4

A new Filter for Specific Scorecard Items dialogue will appear. The item you selected will be at the top as indicated. This new dialogue will give you the opportunity to add further information or refine what you have. Click **Done**.

| ID | NAME | ORGANIZATION |
|----|-----------|--------------|
| 3 | Financial | Samples |

Show descendants of linked items

SCORECARD ITEM

Find

- International Limited
- Department 1
- Department 2
- Samples

HQ Scorecard

- Financial
- Increase Profitability
- Increase Revenue
- Reduce Sales Overhead Cost
- Customer
- Internal Processes
- Organisational Capacity

Cancel Back Done

Report Writer: Row Filters

The last step is to choose which scorecard items you want to show in your report by adding row filters. Without any filters, your report would show a row for every scorecard item across all organizations.

You can filter on just about anything, but some examples are:

- Specific scorecard items: For example, only items in two specific scorecards
- Name: For example, only items with "research" in their names
- Data type: For example, only percentage metrics
- Color: For example, only items performing in the red

CURRENT FILTERS + Add

Specific Scorecard Items: is any of the following: Financial and descendants

Cancel Back Get Report

The original **Row Filters** dialogue will re-appear. This time the rows you have selected will be shown in the **Current Filters** box

Click **Get Report**



Building Charts & Reports - 5

The filtered report will appear. **The report has not been saved yet.** Click on **Save** to give the report a name and save it to your Charts and Reports list.

Report Writer

Overview Edit April 2018 < >

| NAME | APRIL 2017 | MAY 2017 | JUNE 2017 | JULY 2017 | AUGUST 2017 | SEPTEMBER 2017 | OCTOBER 2017 | NOVEMBER 2017 | DECEMBER 2017 | 2017 | JANUARY 2018 | FEBRUARY 2018 | MARCH 2018 | APRIL 2018 | 2018 |
|---|------------|----------|-----------|-----------|-------------|----------------|--------------|---------------|---------------|--------|--------------|---------------|------------|------------|--------|
| Financial | | | | | | | | | | | | | | | |
| Increase Profitability | | | | | | | | | | | | | | | |
| Net Profit | £31.1K | £31.3K | £31.7K | £31.6K | £31.7K | £31.8K | £32K | £31.9K | £31.7K | £379K | £31.7K | £31.8K | £31.9K | £32.1K | £388K |
| Net Profit - Target | £31.5K | £31.6K | £31.7K | £31.6K | £31.5K | £31.7K | £31.7K | £31.8K | £31.6K | £379K | £31.6K | £31.7K | £31.8K | £32K | £388K |
| % Net Profit | 20.6% | 20.5% | 20.6% | 20.7% | 20.6% | 20.5% | 20.6% | 20.7% | 20.8% | 20.6% | 20.8% | 21.1% | 20.8% | 20.7% | 20.7% |
| Increase Revenue | | | | | | | | | | | | | | | |
| Revenue | £150K | £153K | £154K | £153K | £154K | £155K | £155K | £154K | £152K | £1.84M | £152K | £154K | £153K | £155K | £1.88M |
| Projects greater than £25k in value | 18 | 17 | 16 | 15 | 13 | 17 | 18 | 19 | 17 | 201 | 18 | 16 | 15 | 15 | 190 |
| Reduce Sales Overhead Cost | | | | | | | | | | | | | | | |
| % sales overhead/revenue | 5.1% | 5.2% | 5.1% | 5% | 4.7% | 4.6% | 4.7% | 5.1% | 5.1% | 5% | 5% | 5.1% | 5.2% | 4.7% | 4.9% |
| Number of trained sales people (advanced) | 6 | 6 | 6 | 6 | 5 | 5 | 5 | 6 | 6 | 68 | 6 | 6 | 6 | 6 | 65 |

Mass Edit Save

! You haven't saved this report yet

Now is the time to experiment building Charts and Reports. Follow the basic sequence as show above.

If you want to build a Chart like the one below, select + **New Report** and then **Chart Writer**. Tip: be sure to select **Actual Values** during the dialogue

