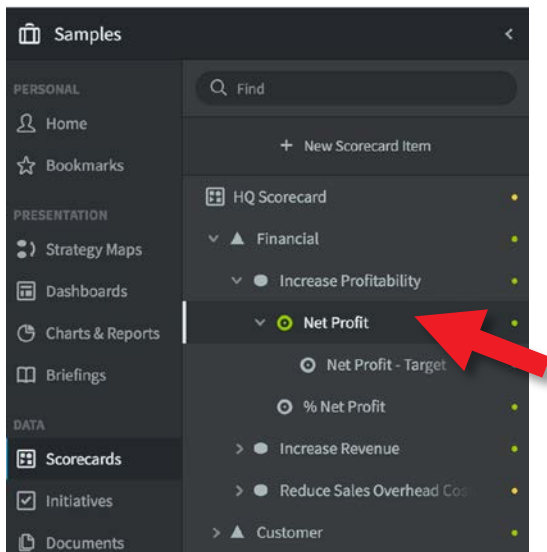




Owners and Updaters - 1

Owners and Updaters can be assigned to Scorecard elements and Initiatives. Only users of the application can be Owners and Updaters. Before they are assigned they have to be added to the system - See the user guide: Adding a User.

There are two ways to assign an Owner or Updater. The first is to go direct to the Scorecard element or the second direct in an Initiative.



Direct - in a Scorecard Element

Go to the Scorecard you are interested in then click on the element.

In the example to the right we have gone to the **Samples** scorecard, opened the Financial Perspective and the Objective Increase Profitability and clicked on the KPI/Measure **Net Profit**.

The KPI/measure data appears in the right hand panel. Towards the top right of the panel are two tabs. Click on **Edit**.





Owners and Updaters - 2

This will reveal the Edit panel you saw when you created the KPI/Measure. At the bottom of this panel are the **Owner** and **Updater** fields. Click on **Add Owner** and start typing the name of the Owner or select from the drop-down list. Do the same for the Updater. **Don't forget to click Save.**

The screenshot shows the 'SERIES' configuration panel for a KPI/Measure. It includes three main sections: 'Actual Value', 'Red Flag', and 'Goal'. Each section has a dropdown menu for the type (Manual, Calculated), a dropdown for 'Treat missing values as N/A', and a text input field for the value. Below these are two lists: 'OWNERS' and 'UPDATERS'. Both lists have a 'New User' entry and an 'Add Owner...' or 'Add Updater...' link. Two red arrows point to the 'New User' entries in both lists. To the right of the 'UPDATERS' list is an 'UPDATE THRESHOLDS' section with a checkbox and a trash icon.

Scoreboard:

YOUR RESPONSIBILITIES
KPIs I Own You own 6 KPIs.
KPIs I Update You update 7 KPIs.
My Tasks You have 1 Task that haven't been completed.

Once an Owner or updater has been added to a KPI/Measure the application will present these KPIs/Measures to the Owner or Updater when they sign on.

QuickScore:

YOUR RESPONSIBILITIES
Measures I Own You own 5 Measures.
Measures I Update You update 6 Measures.
My Tasks You have 0 Tasks that haven't been completed.

Click on the **Home** button in the main menu and you will see this panel on the right hand side of the screen.

Click on **KPIs I update** for Scoreboard

or

Click on **Measures I Update** for QuickScore.



Owners and Updaters - 3

The following panel will be revealed containing all of the KPIs/Measures that have been assigned to an individual. This makes it very easy to make updates.

KPI	PERIOD	ACTUAL	THRESHOLDS
Net Profit - Target	April 2018	£	
Time spent problem solving (hours)	April 2018	20	10
Customer Satisfaction	April 2018	89 %	80 % 90 %
% satisfaction surveys completed	April 2018	60 %	80 %
Customer retention rate	April 2018	75 %	85 %
Customer turnover rate	April 2018	1.5 %	1 %
Net Promoter Score (NPS)	April 2018	70 %	75 %

Energy Consumption Report

Direct - In an Initiative

Go to the Initiative you are interested in then click on it or a task/milestone below it.

In the example to the right we have gone to the **Samples** initiatives, and clicked on **Energy Consumption Report**.

Click on the **Edit** tab to towards the top-right of the screen as shown below.

Energy Consumption Report

Overview Timeline

Write a report for the director defining a project that will help reduce energy consumption and get this KPI

PROJECTED SCHEDULE

PROJECTED TOTAL BUDGET

Edit



Owners and Updaters - 4

This will reveal the edit panel with the Assigned Users and Groups fields at the bottom. Start typing or use the drop-down to assign a user to the task. Once again, **don't forget to click Save.**

Energy Consumption Report [Info] [Refresh]

Overview | Timeline Edit

Name
Energy Consumption Report

Description
Write a report for the director defining a project that will help reduce energy consumption and get this KPI back on track

Type
Initiative

Start Date
16/4/2018

Due Date
21/5/2018

Currency
Default


Total Budget
5,000 £

Advanced Options

ASSIGNED USERS AND GROUPS

Lee Child

Add User or Group...



Once an Owner has been added to an Initiative, the system will present the information on the Home screen. Click on **Home** in the main menu and this time click on **My Tasks** in the panel towards the top-right.

Any owned initiatives will appear with a link to the initiative itself.

Home																									
Welcome	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">✔ 2 Tasks</div> <div style="border: 1px solid #ccc; padding: 5px;"><p>My Tasks</p><table border="1"><thead><tr><th>TASK NAME</th><th>START DATE</th><th>END DATE</th><th>% COMPLETE</th><th>BUDGET SPENT</th><th>TOTAL BUDGET</th></tr></thead><tbody><tr><td colspan="6">Samples</td></tr><tr><td>Energy Consumption Report</td><td>16 Apr 2018</td><td>21 May 2018</td><td>80%</td><td>£3,678</td><td>£5,000</td></tr><tr><td>Marketing Plan</td><td>1 Jan 2018</td><td>31 Mar 2018</td><td>55%</td><td>£2,858</td><td>£7,500</td></tr></tbody></table></div>	TASK NAME	START DATE	END DATE	% COMPLETE	BUDGET SPENT	TOTAL BUDGET	Samples						Energy Consumption Report	16 Apr 2018	21 May 2018	80%	£3,678	£5,000	Marketing Plan	1 Jan 2018	31 Mar 2018	55%	£2,858	£7,500
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