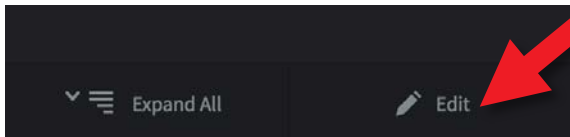




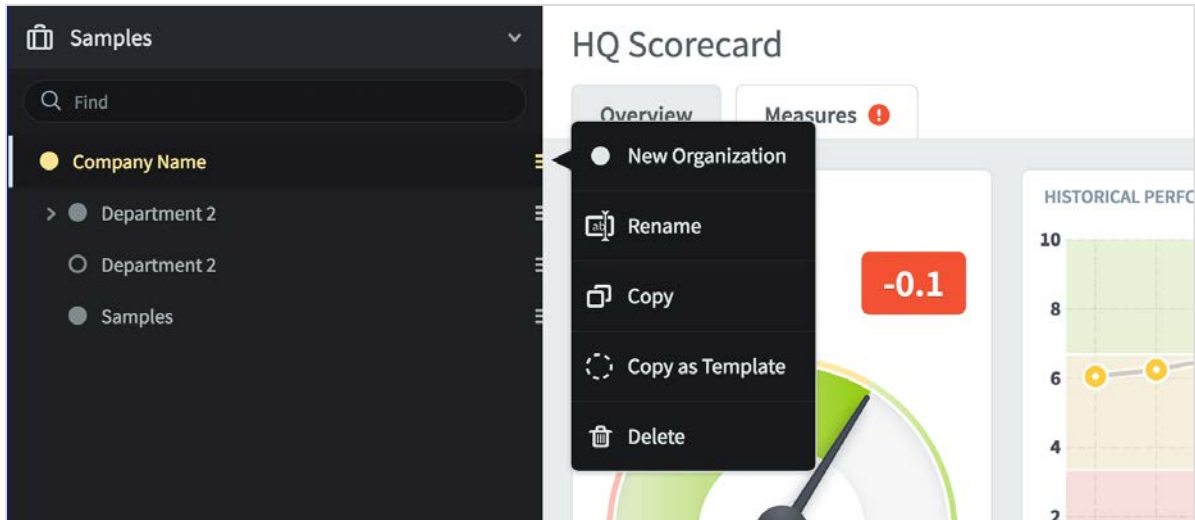
Add an Organization - 1

On entry to the application click on **Scorecards** and then on the **Briefcase** icon (top left) to reveal the **Organization** list. If you are already in the application click on the Briefcase icon.



Highlight **Company Name** and click on **Edit** at the bottom of the screen.

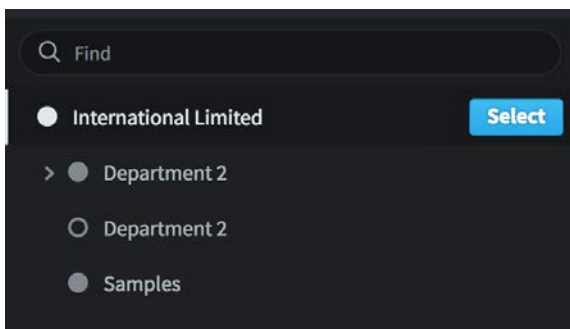
A pop-out menu will appear inviting you to create, rename, copy, copy as a template or delete an **organization**.



Click on **Rename** and change the name from **Company Name** to the name of your company or organization. In this example we will change the name to **International Limited**.



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

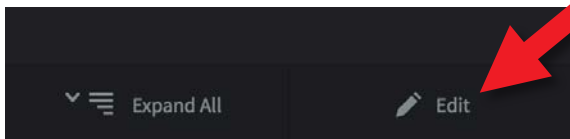


Your company name will appear and you will be asked to create a Scorecard.



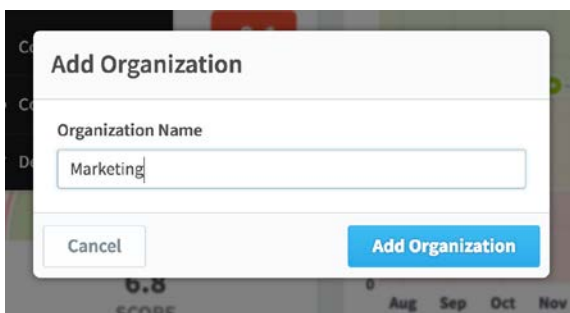
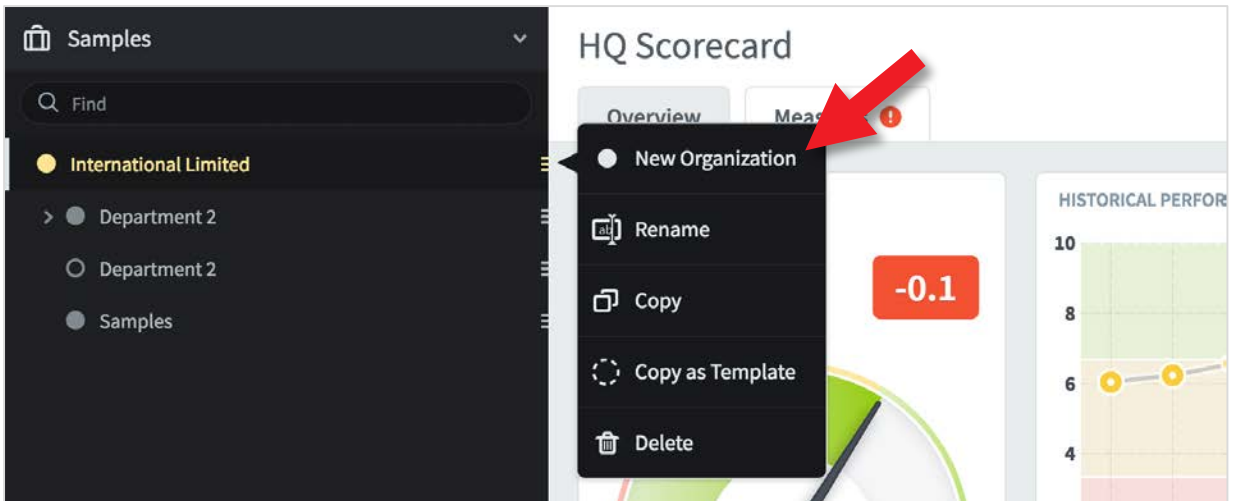
Add an Organization - 2

To add a **New Organization**, highlight the organization under which you want to create the new one (there can be several tiers). In our example below we will add a new organization under International Limited called **Marketing**.



Highlight **International Limited** and click on **Edit**.

The pop-out menu will appear inviting you to create, rename, copy, copy as a template or delete an **Organization**. This time click on **New Organization**.



The Add Organization dialogue appears. Enter the new name, in this case Marketing, and click on **Add Organization**.

Click **Done** at the bottom of the screen to come out of Edit mode.



The new organization will appear at the bottom of the list.



Add an Organization - 3

If you want to create a scorecard at this point, go to the **Create a Scorecard** user guide.

The following describes the actions that can be performed while in organization edit mode:

- **New organization:** Highlight the organization above the one you want to create and click on New organization. Give the new organization a name. The new organization will appear below the one you have highlighted.
- **Rename:** Highlight the organization you want to rename, click on Rename and change the name of the organization.
- **Copy:** Highlight the organization that you want to copy, click on Copy. In this instance a dialogue box will appear asking you where you want to copy the instance to. Click on the organization under which you want the copy to appear. Please Note: the Copy operation will only copy the structure of the scorecard, it will not copy the data.
- **Copy as a Template:** Highlight the organization that you want to be the Master Template. Click on Copy as a Template. A dialogue box will appear asking you where you want to copy the instance to. Click on the organization under which you want the copy to appear. An exact copy of the structure will appear. In this instance, any changes made to the Master template will automatically be made in the copied versions.

This operation is very useful when multiple scorecards of the same type are required, for example regional safety scorecards.

- **Delete:** Deletes the organization. A warning dialogue will appear.