



Key Performance Areas/Objectives

You can add the following scorecard groupings (containers) to a Scorecard:

For Scoreboard:

- Key Performance Area
- Objective
- Generic Item
- KPI
- Linked Item

For QuickScore:

- Perspective
- Objective
- Theme
- Measure
- Linked Item

If you **only** want to add KPIs/Measures to your scorecard then miss this section and go straight to the **Creating KPIs/Measures** guide.

Adding scorecard groupings (containers)

The objects listed above are all types of 'containers' that are used to group KPIs or Measures. The same process is used to create each of them.

Typically, a grouping might look like this:

For Scoreboard

- Scorecard
 - Key Performance Area
 - Objective
 - KPI
 - KPI
 - Objective
 - KPI
 - KPI
 - Generic Item
 - KPI
 - KPI
 - KPI
 - Etc.

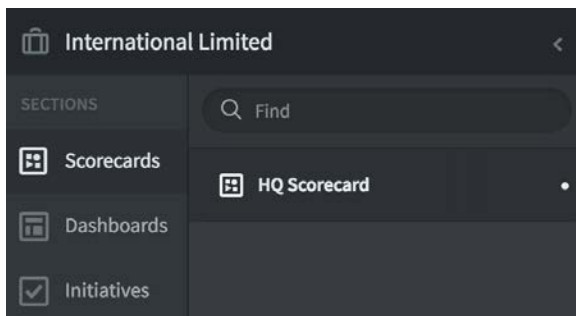
For QuickScore

- Scorecard
 - Perspective
 - Objective
 - Measure
 - Measure
 - Objective
 - Measure
 - Objective
 - Measure
 - Theme
 - Linked Objective
 - Linked Objective
 - Linked Objective



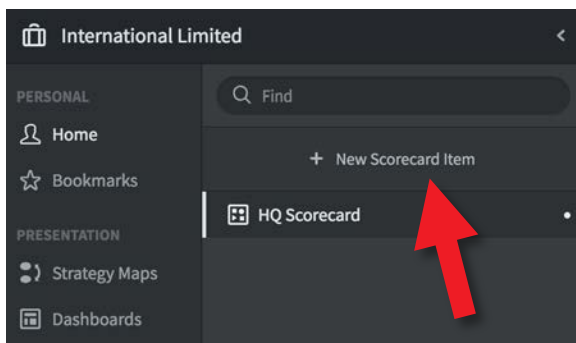
Key Performance Areas/Objectives

The application will take care of scoring each KPI/Measure and will roll up the score values to the scorecard headers you have defined.



To add any scorecard object, you must be an **Administrator**.

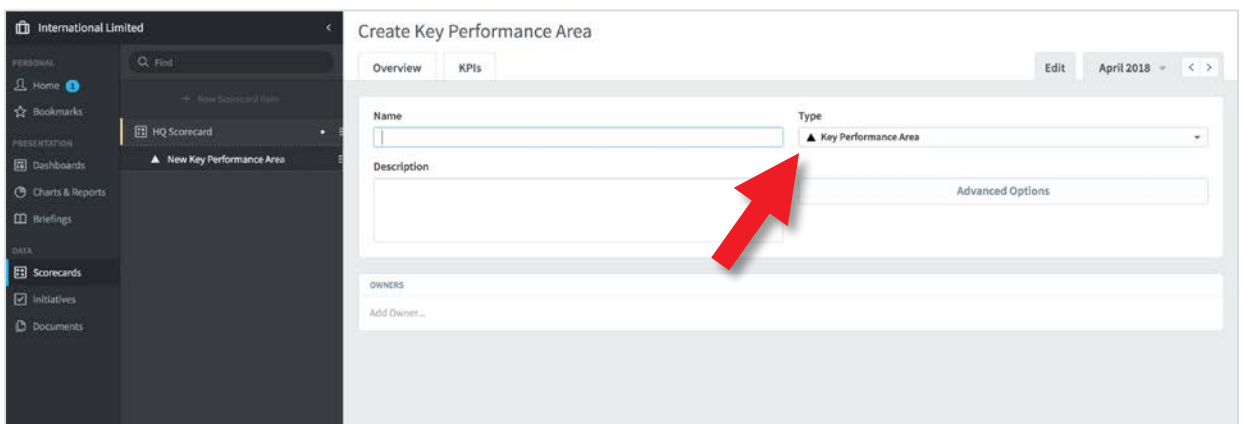
Click on the Scorecard object (in our example HQ Scorecard) so that it is highlighted.



Click on + **New Scorecard Item** at the top of the menu.

You are now in 'Edit' mode and the application will invite you to Create a Key Performance Area (in Scoreboard) or a Perspective (in QuickScore).

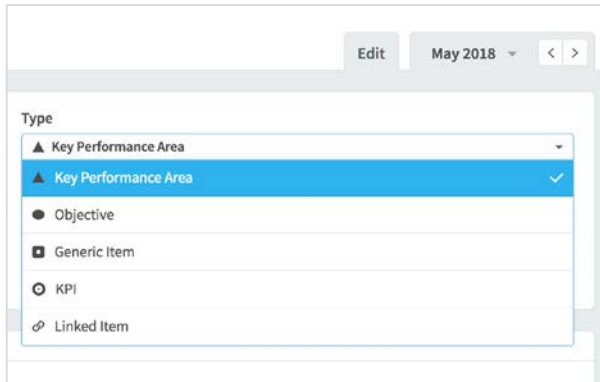
Use the **Type** drop-down to select the type of scorecard group (container) you require - they all act in the same way, they just have different names.





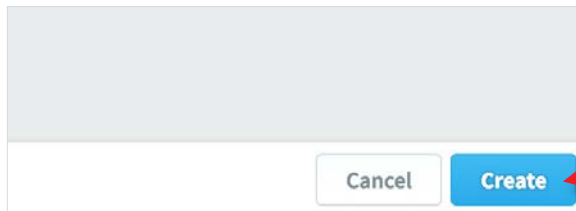
Key Performance Areas/Objectives

To illustrate this process we will add a **Key Performance Area** (Perspective in QuickScore) called Financial and an **Objective** called Improve Profit.

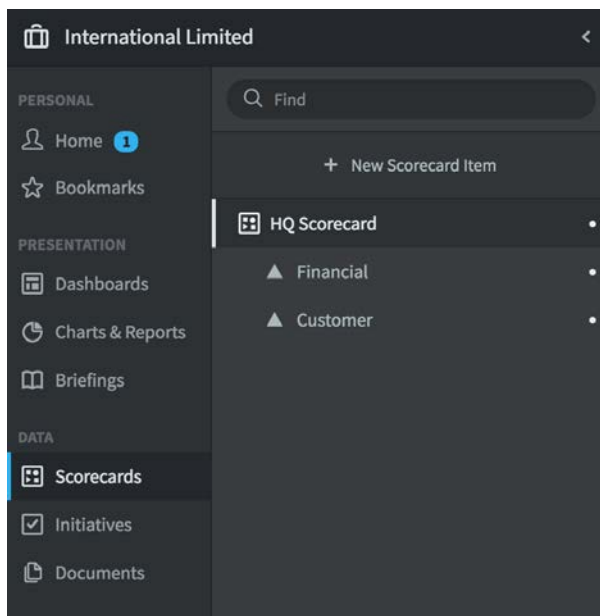


Click on the **Type** drop-down and select **Key Performance Area** (Perspective in QuickScore).

Give it 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 item, you will see it to the left in the list.

The application will invite you to create another item of the same type. This time add Customer, click Create and then click **Cancel**.

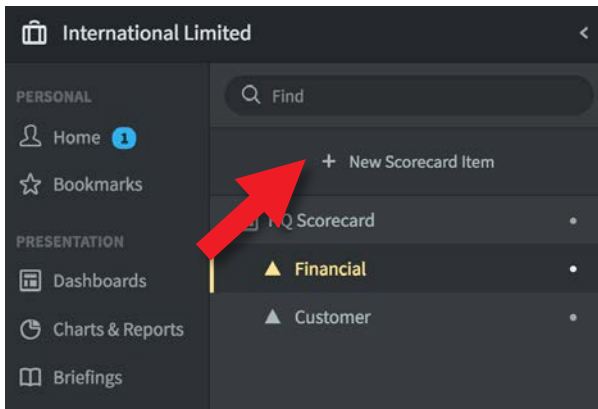
Finally click **Done** to come out of Edit mode.

Your scorecard so far will look like this.



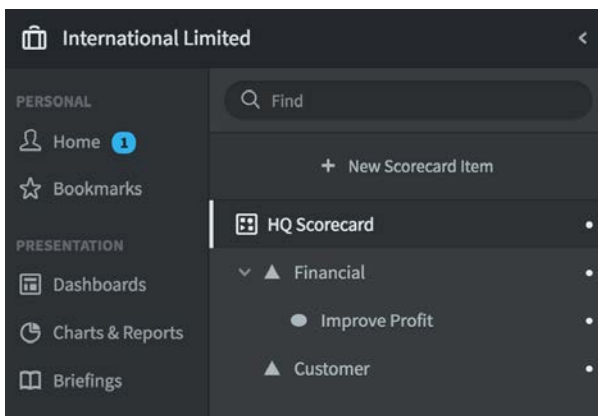
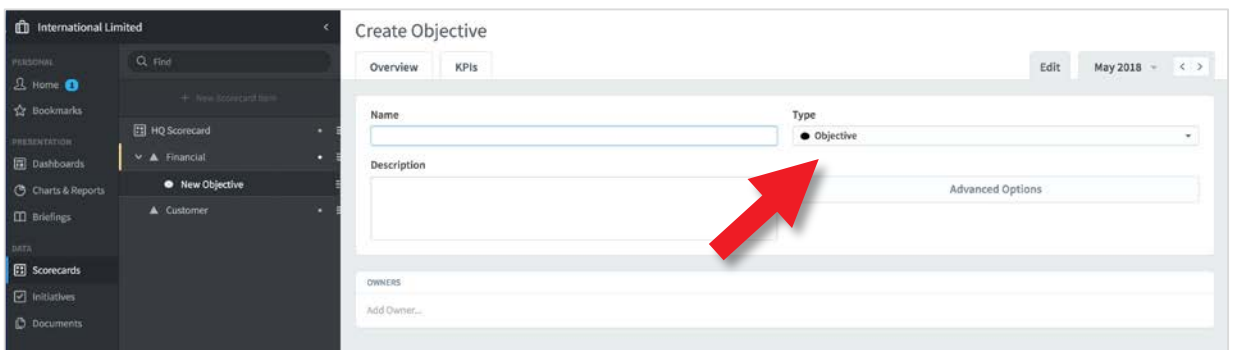
Key Performance Areas/Objectives

With two **Key Performance Areas** (Perspectives in QuickScore) in place we can now add an **Objective**.



Click on the Financial area that you have just created to highlight it.

Click on **+ New Scorecard Item**. The application knows what level you are working at and so will suggest you want to add an Objective.



Add the name of the Objective and optionally a description and click Create. The application will ask if you want to create another one.

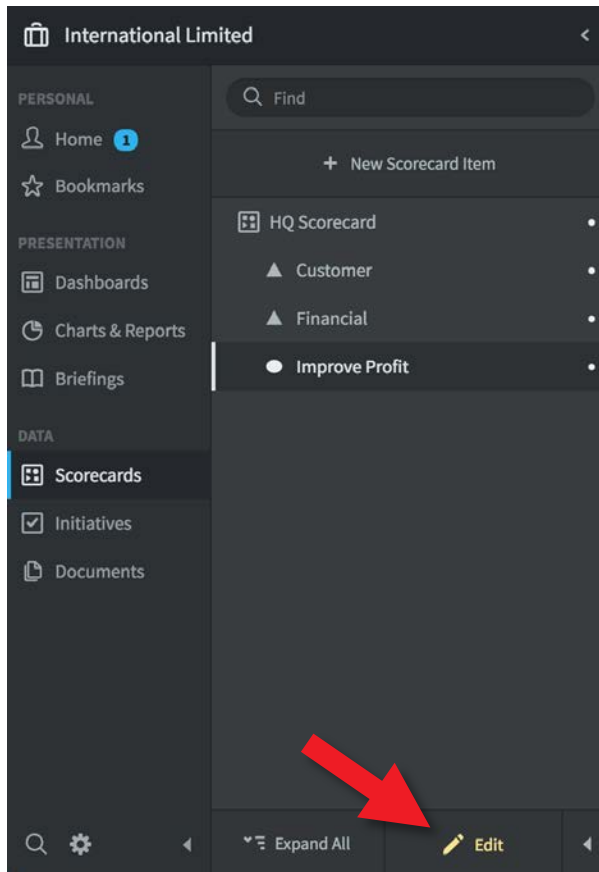
Click **Cancel** for now.

Click on Done to come out of Edit mode. The scorecard should look like this.



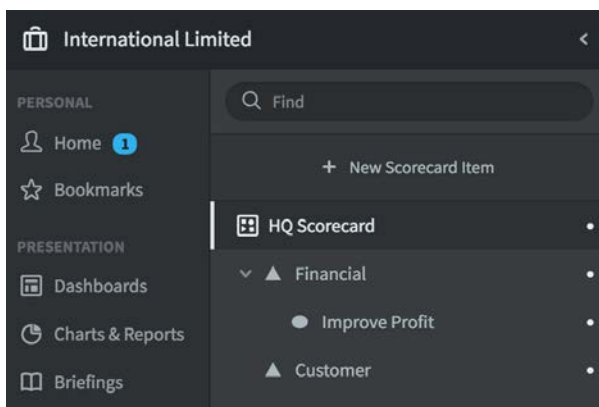
Arranging a Scorecard

If you have made a mistake and your scorecard elements are not in the correct order or at the correct level do not worry. You can change the order or the levels/tiers by going back into Edit and dragging and dropping the objects to the correct place.



If your scorecard has ended up looking something like the version on the left,

Click **Edit** at the bottom of the screen, drag and drop the objects to the correct place (to Tier an object, hold it over the upper-level and drop it) and click **Done**.



The result should look like this.