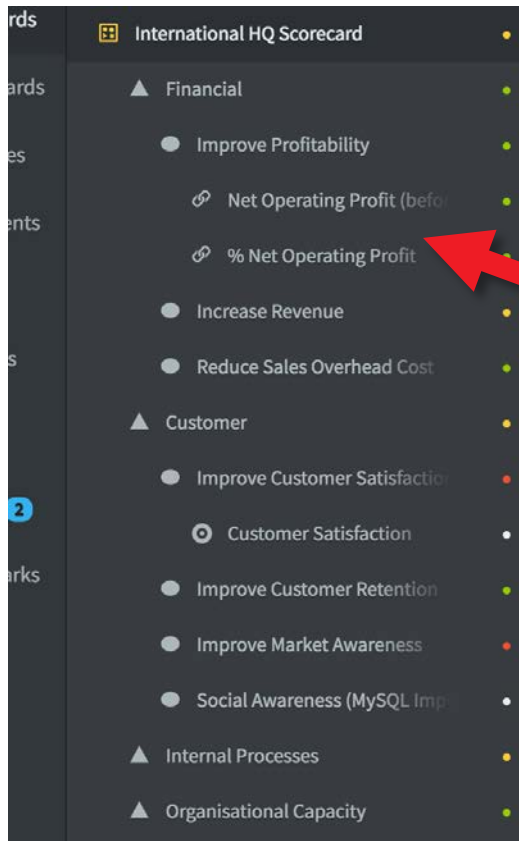




Linking Objects - 1

Data within the application should never be duplicated. However, there are times when the same data needs to be used in two or more places. To achieve this, objects can be 'Linked'. This preserves a single-source of truth while at the same time providing flexibility.

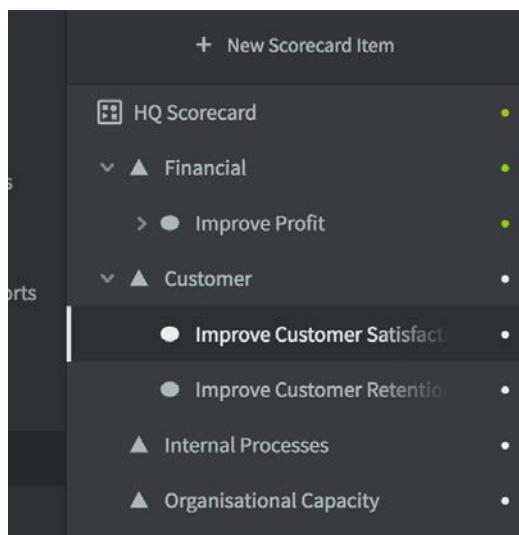


The most common example of 'Linked Objects' can be seen in an HQ scorecard where HQ objectives are underpinned by KPIs/Measures that reside in other scorecards.

The example to the left shows two 'linked' KPIs/Measures (represented by the link icon) under the objective Improve Profitability.

These KPIs/Measures actually reside in the Financial Department's scorecard and are referenced using the **Link** function.

Whereas, under the objective Improve Customer Satisfaction we can see an actual KPI/Measure (represented by the circle icon).



To link an object

The process of linking is the same for any object. First go to the object you want to link another object to.

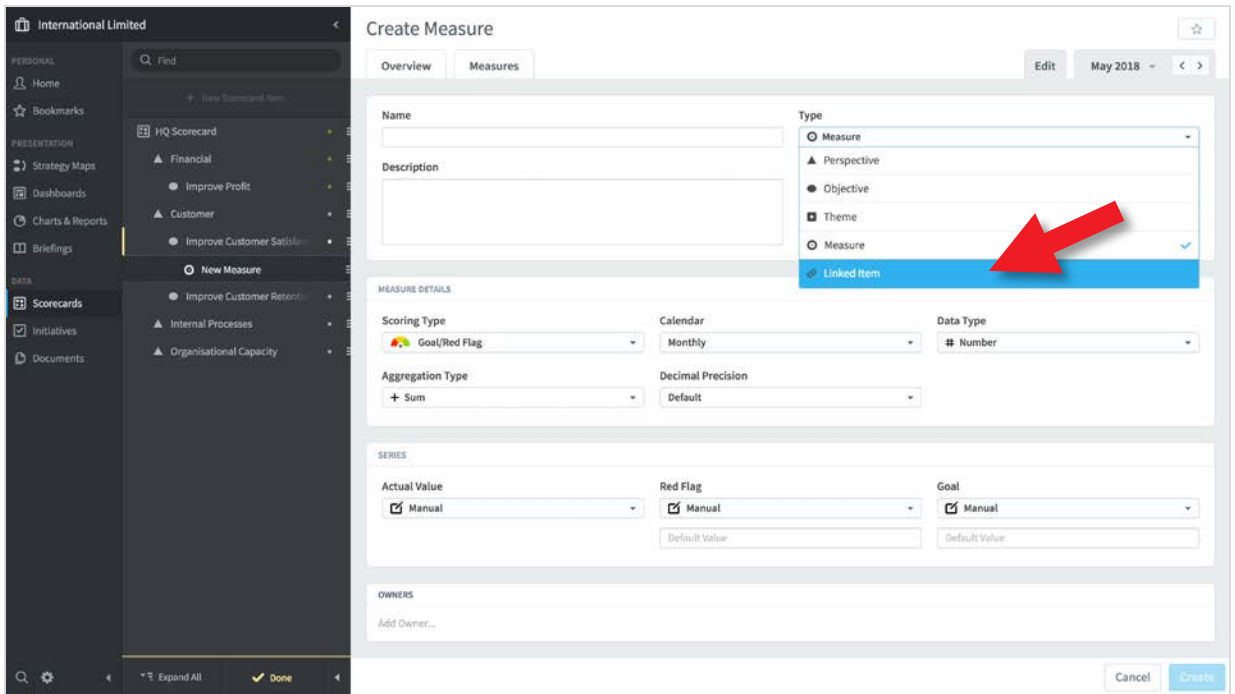
In this example we have selected the objective **Improve Customer Satisfaction** in the International Limited Scorecard created in an earlier guide.

Click on + **New Scorecard Item**



Linking Objects - 2

The **Create KPI** (in Scoreboard) **Create Measure** (in QuickScore) panel will appear. Under Type, select **Linked Item**.



The **Create KPI/Measure** panel will be replaced by the **Create Linked Item** panel.



Linking Objects - 3

The screenshot shows the 'Create Linked Item' interface. At the top, there are tabs for 'Overview' and 'Measures', and buttons for 'Edit' and a date selector 'May 2018'. The main form has a 'Name' field containing 'Customer Satisfaction' (marked with a red circle 3) and a 'Type' dropdown set to 'Linked Item'. Below the name field is a 'Description' text area and an 'Advanced Options' button. The 'CHOOSE SOURCE ITEM' section is divided into two columns. The left column shows a tree view with 'Samples' selected (marked with a red circle 1). The right column shows a search results list with 'Customer Satisfaction' selected (marked with a red circle 2). Below this is the 'USE FROM SOURCE ITEM' section with checkboxes for 'Name and Description', 'Notes', 'Owners', 'Tags', and 'Related Items' (marked with a red circle 4). At the bottom right, there are 'Cancel' and 'Create' buttons (marked with a red circle 5).

Do the following:

1. Click on the scorecard where the linked object resides in the left hand list
2. Drill down and Click on the actual linked object in the right hand list
3. The name will appear. You can change it if you need to
4. Select which attributes you would like to appear with the linked object
5. Click on the blue Create button