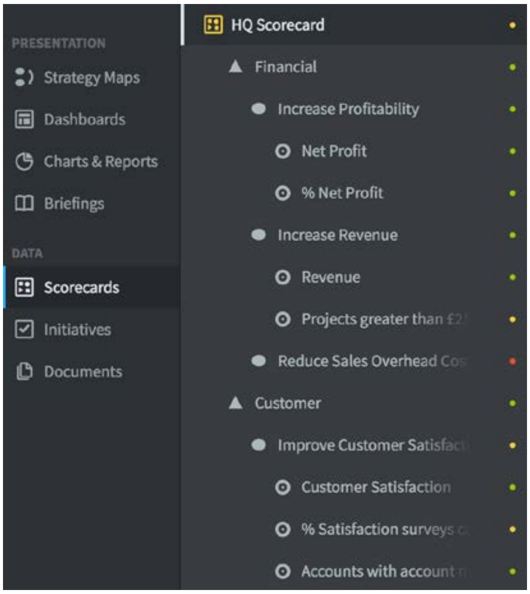
Importing Actual Values - 1

If you have a lot of Measures that need to be updated on a regular basis, you may find it easier to import the actual values (and thresholds) either from a spreadsheet or by connecting to an external system/database.

Both are possible. This guide covers importing Actual Values from a spreadsheet or csv file. For database linkage, please contact Intrafocus.



Create Your Scorecard

First you need to create a scorecard.

There needs to be a destination for the Actual Values of every KPI/Measure that you want to update.

For this guide we have created a simple scorecard containing Perspectives, Objectives and Measures.

If you need help creating a scorecard, go to the **Adding an Organization** and **Creating a Scorecard** user guides.

A separate, but connected application is used to import actual values.

Copy the URL of your system up to and including .com, go to a new browser window, paste the URL and add **/connect** and hit enter. The result should look like this:

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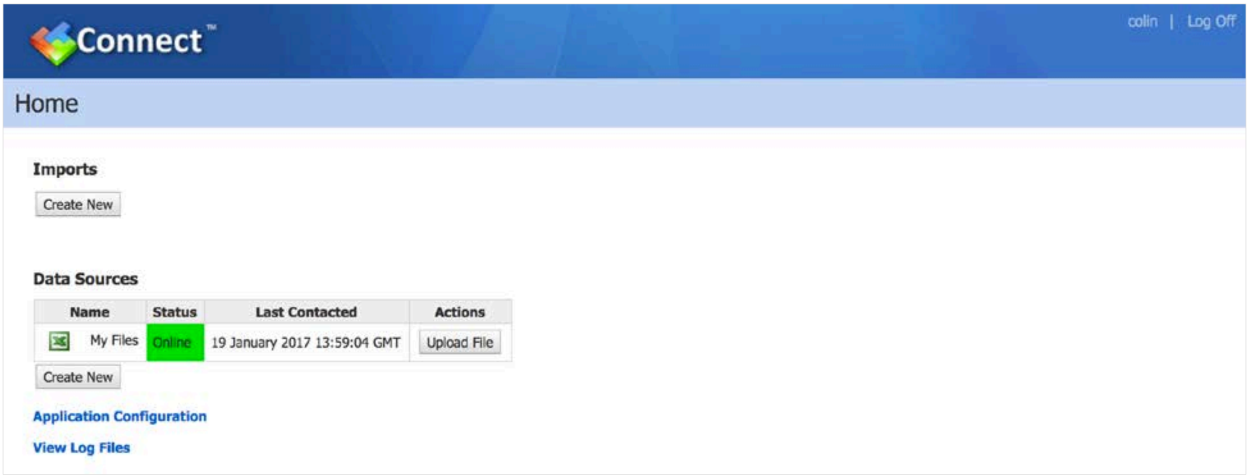
Use the same **username** and **password** that you use for the main application and log into Connect:



Connect has a very basic interface as its only purpose is to import data from other systems or spreadsheets/csv files. The spreadsheet/csv **Data Source** has already been defined so we can go straight to **Imports.**

Click on **Create New.**

The **Edit Import** screen will appear. All of the lozenges will be grey indicating nothing has been updated.

Click on **Basic Information.**

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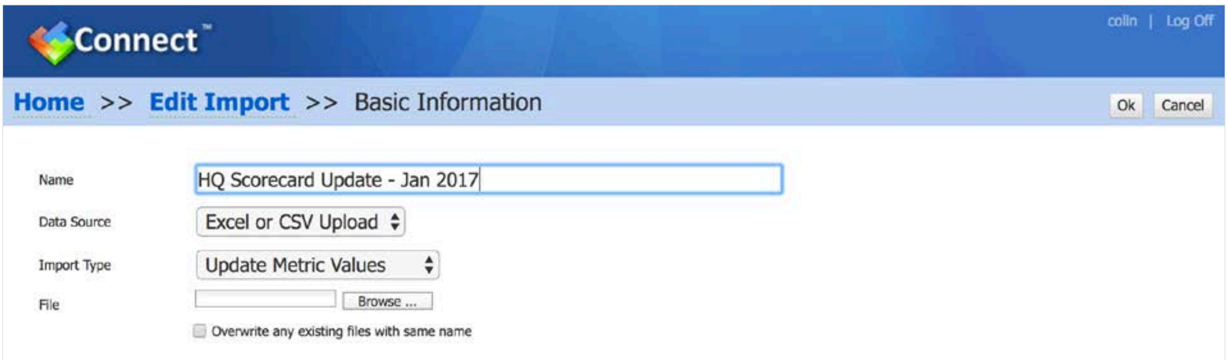
The **Basic Information** screen will appear. Give the import a name. Try and be specific, add a date if required.



At this point you will need to have an import spreadsheet ready. The application will accept several formats. Rows and columns can be excluded. However we advise, for best results, you keep the format as simple as possible.

For this example we are assuming that **Actual Values** are added **Monthly.**

There are two main formats described in this user guide:

1. **Updating one month and including thresholds** - this is useful as a standard monthly upload that includes variable thresholds.
2. **Updating using historical data** - this is useful when you want to load several months of data in one go.

The format for monthly historical data should look like this:

	A	B	C	D	E	F	G	H	I
1	Metric Id/Name	20/01/2017	20/02/2017	20/03/2017	20/04/2017	20/05/2017	20/06/2017	20/07/2017	20/08/2017
2	Net operating profit	19509	19678	19574	19574	19678	19687	19.3	19.1
3	% sales overhead/revenue	5.5	5.3	5.1	5.2	4.8	4.7	4.6	4.7
4	Average time spent resolving a problem	21	31	27	32	22	30	21	28
5	Sales people trained in software	4	4	4	5	5	5	6	6
6	% satisfaction surveys completed	70	75	76	77	76	78	75	73
7	Average satisfaction survey score	95	92	93	94	94	86	84	80
8	Accounts with account managers	30	31	32	35	36	40	41	43
9	Number of items in knowledge base	38	38	39	43	47	51	52	52

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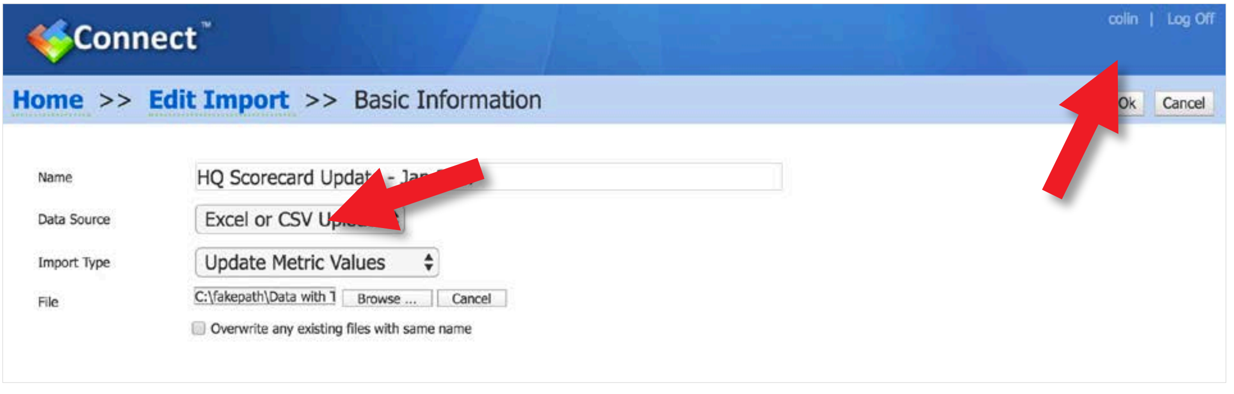
The format for single month data with thresholds should look like this:

Metric Id/Name	Date	Value	Threshold	Threshold	Threshold	Threshold	Threshold	Note
Net operating profit	28/01/2017	21254	20000	21000				Net profit is very high this montl
% sales overhead/revenue	28/01/2017	5.5	5.3	5.4				Sales overhead is too high beca
Average time spent resolving a problem	28/01/2017	21						
Sales people trained in software	28/01/2017	4						
% satisfaction surveys completed	28/01/2017	70						
Average satisfaction survey score	28/01/2017	95						
Accounts with account managers	28/01/2017	30						
Number of items in knowledge base	28/01/2017	38						

Things to notice in the the single month version:

- The dates have been added as a row. These can be omitted and the system will default to the current date.
- Threshold can be added for the measures that have variable monthly thresholds.
- Notes can be added.

The following example shows how to **import single month data.** If you want to add historical data (or future data e.g. forecasts or targets) the same process can be used with the historical data spreadsheet/csv. Be sure to use the right configuration parameters during the **Source Data** view phase.



On the Basic Information screen, click on **Browse** and select the spreadsheet from your computer or shared location. It will appear in the **File** box.

Click on **OK** at the top right of the screen.

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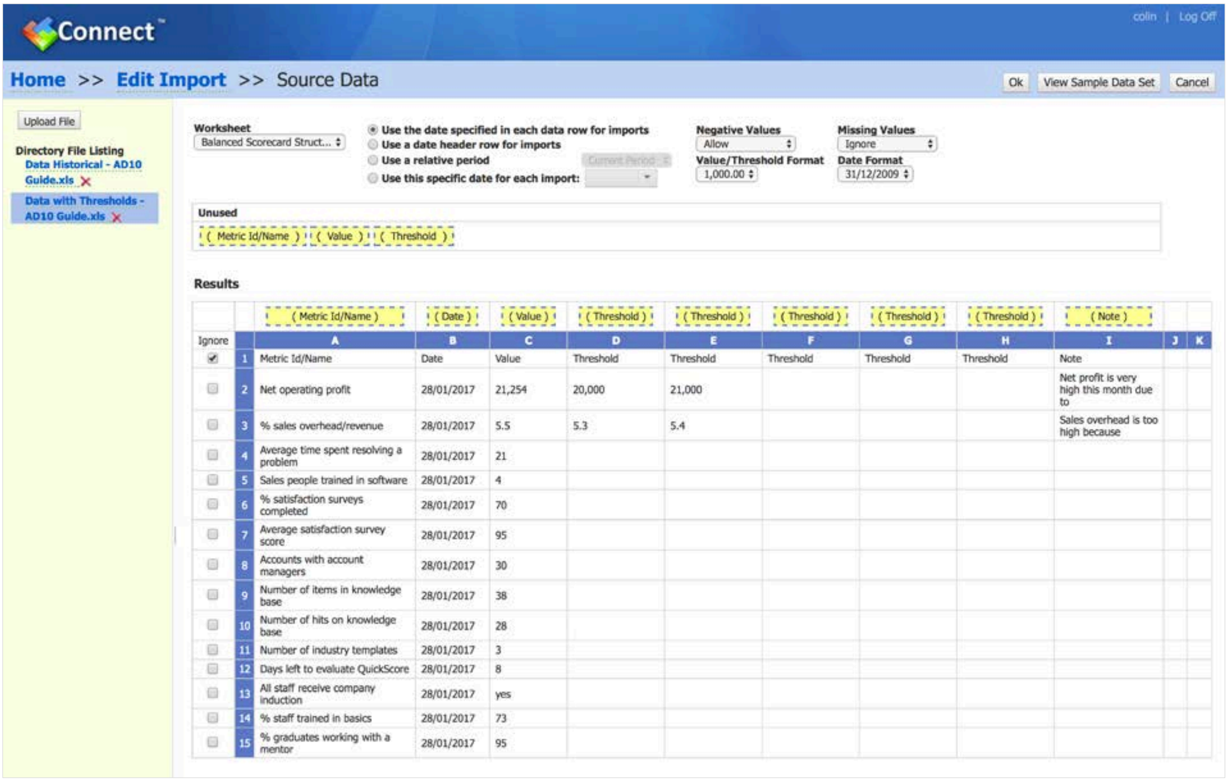
The **Edit Import** screen will appear. The Basic Information has been coloured blue indicating that part of the process is complete.

Click on **Source Data.**



Your file will appear. Check that the **Headers** for each column are in the correct place. The application will match header labels when they are exact.

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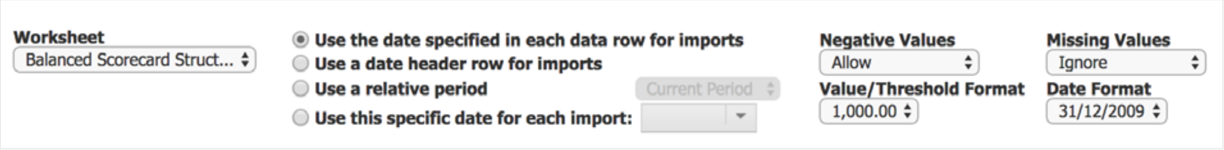
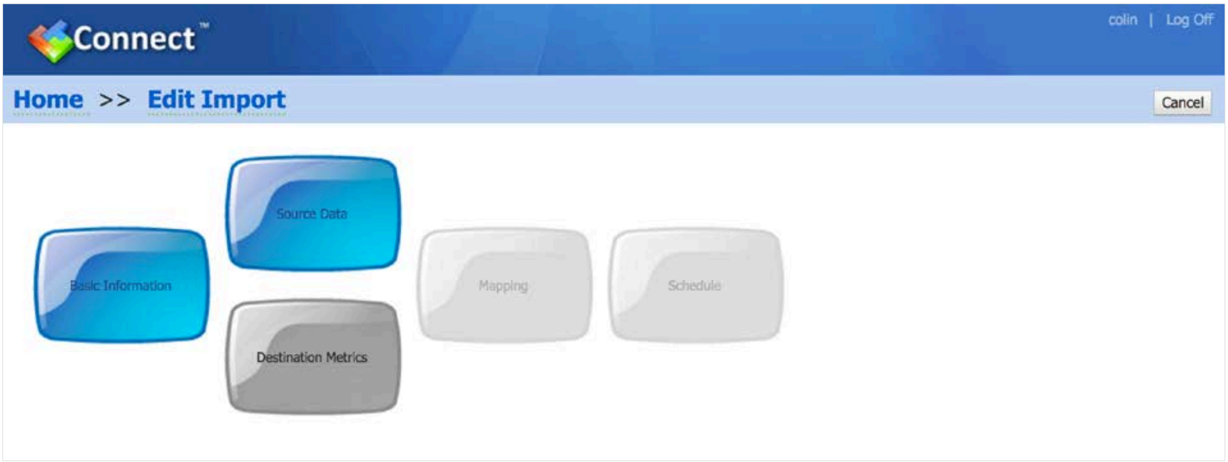
There are several options you can use when importing depending on the spreadsheet/csv file structure you have used:



For this example we have used dates in rows so have checked the radio button - **Use the date specified in each data row for imports.**

If you are importing historical data, you would select **Use a date header row for imports.**

Check each of the options have defaulted correctly and click the OK button.



The **Edit Import** screen will appear. The Source Data lozenge is now blue indicating that part of the process is complete.

Click on **Destination Metrics.**

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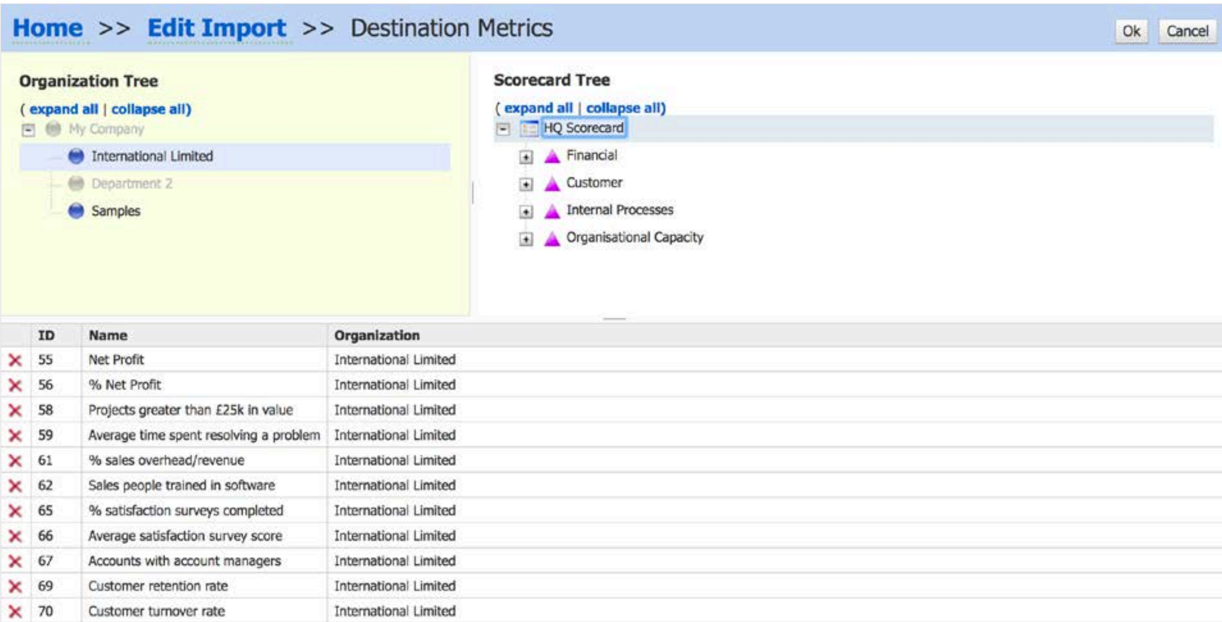
The **Destination Metrics** screen will appear:



	ID	Name	Organization
✕	55	Net Profit	International Limited
✕	56	% Net Profit	International Limited
✕	58	Projects greater than £25k in value	International Limited
✕	59	Average time spent resolving a problem	International Limited
✕	61	% sales overhead/revenue	International Limited
✕	62	Sales people trained in software	International Limited
✕	65	% satisfaction surveys completed	International Limited
✕	66	Average satisfaction survey score	International Limited
✕	67	Accounts with account managers	International Limited
✕	69	Customer retention rate	International Limited
✕	70	Customer turnover rate	International Limited

Click on the Organization where you have created the scorecard (under Organization Tree). In our example, this is International Limited.

The scorecard will appear in the right hand panel. Click on the scorecard (or on the elements of the scorecard you are interested in) and the Measures will appear in the bottom part of the screen.

When you are happy all of the Measures are included, click the **OK** button at the top right of the screen. The **Edit Import** screen will re-appear:

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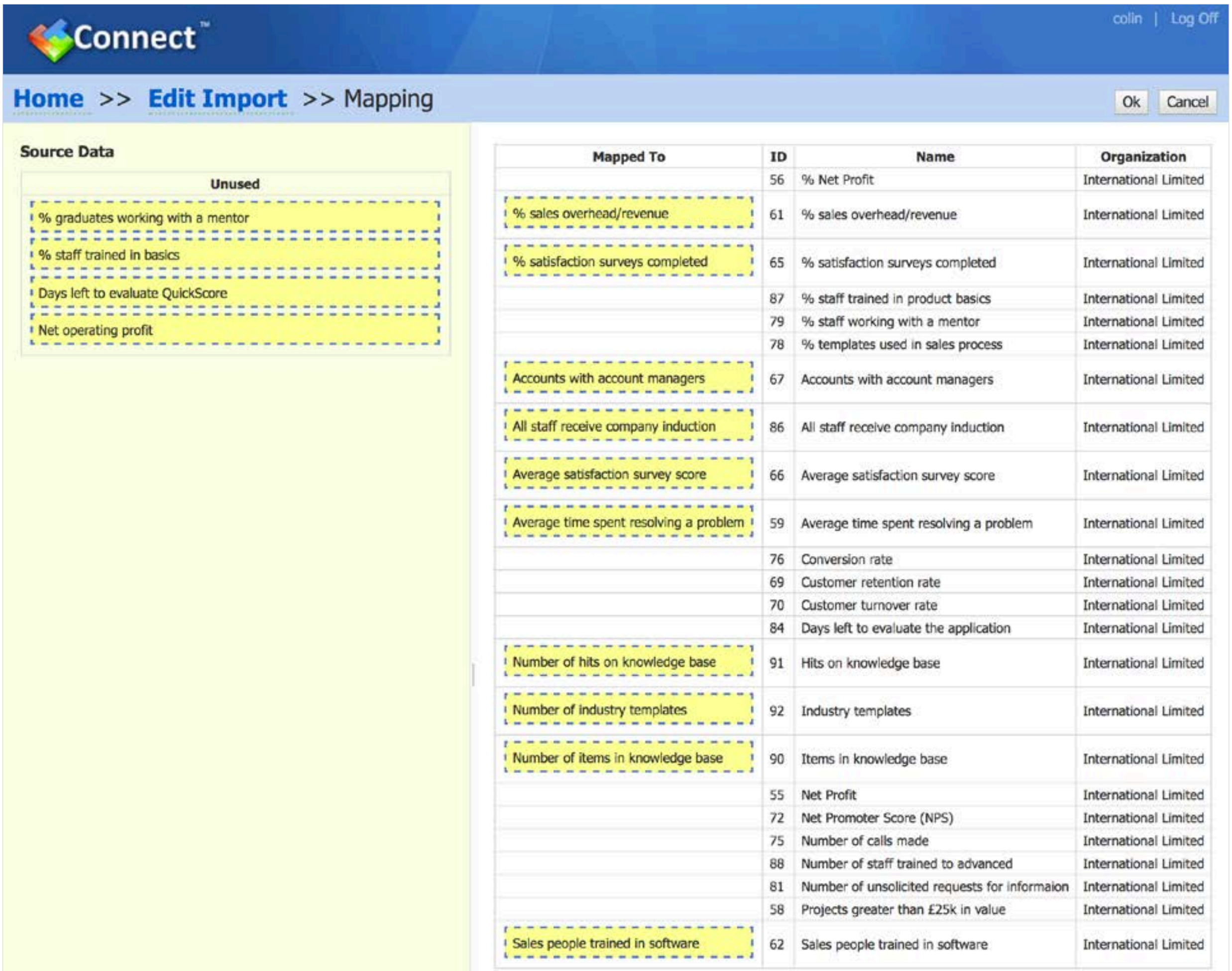
Click on **Mapping** (from the progress screen) and the Mapping screen will appear:



Mapped To	ID	Name	Organization
	56	% Net Profit	International Limited
% sales overhead/revenue	61	% sales overhead/revenue	International Limited
% satisfaction surveys completed	65	% satisfaction surveys completed	International Limited
	87	% staff trained in product basics	International Limited
	79	% staff working with a mentor	International Limited
	78	% templates used in sales process	International Limited
Accounts with account managers	67	Accounts with account managers	International Limited
All staff receive company induction	86	All staff receive company induction	International Limited
Average satisfaction survey score	66	Average satisfaction survey score	International Limited
Average time spent resolving a problem	59	Average time spent resolving a problem	International Limited
	76	Conversion rate	International Limited
	69	Customer retention rate	International Limited
	70	Customer turnover rate	International Limited
	84	Days left to evaluate the application	International Limited
Number of hits on knowledge base	91	Hits on knowledge base	International Limited
Number of industry templates	92	Industry templates	International Limited
Number of items in knowledge base	90	Items in knowledge base	International Limited
	55	Net Profit	International Limited
	72	Net Promoter Score (NPS)	International Limited
	75	Number of calls made	International Limited
	88	Number of staff trained to advanced	International Limited
	81	Number of unsolicited requests for informaion	International Limited
	58	Projects greater than £25k in value	International Limited
Sales people trained in software	62	Sales people trained in software	International Limited

Where there are exact matches, the application will match the spreadsheet names to the measure names in the application's scorecard.

In our example **Net Operating Profit** does not match with **Net Profit** so the item can be dragged and dropped into the correct place.

Check that all of the Measures you want to map are mapped correctly.

Click the **OK** button at the top right of the screen.

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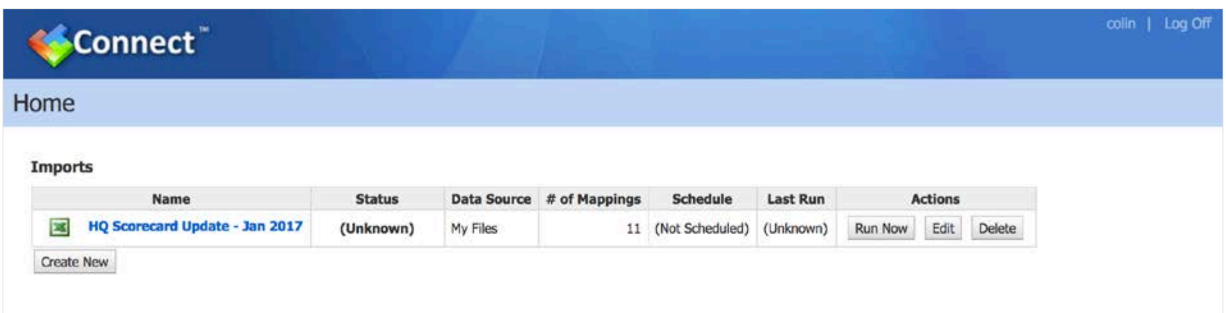
The **Edit Import** screen appears telling you that Mapping is complete. You have the option to **Schedule** a regular update if you wish.

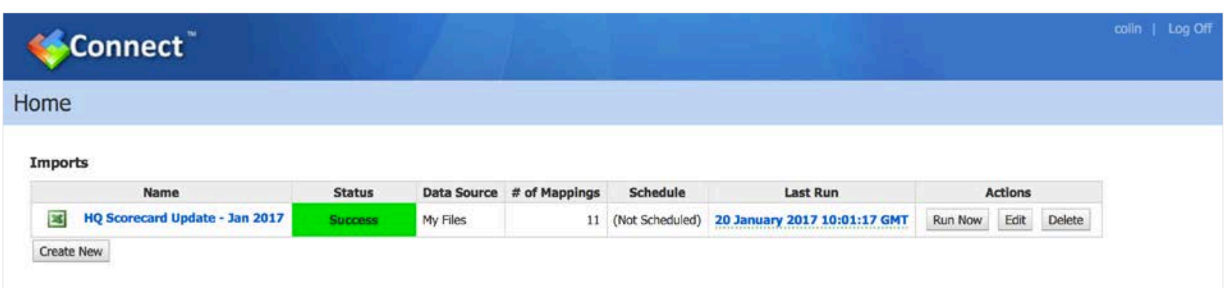
Scheduled Updates - Important - these will only work if you put your data in a place where the application can reach it. The application cannot make calls to areas behind a firewall. Typically, data can be put temporarily into a DMZ for the update process.

Click on the **Save** button at the top right of the screen and the following screen will appear:



The import has been created and mapped. This is a one-off process (unless the scorecard changes). From now, your data file can be uploaded and updated on a regular basis.

To run the update, click on the **Run Now** button.



If the run is successful a green **Success** box will appear together with the **Last Run** date.

If the run is unsuccessful an amber or red status will appear. Click on the amber or red box to find out why the run failed.

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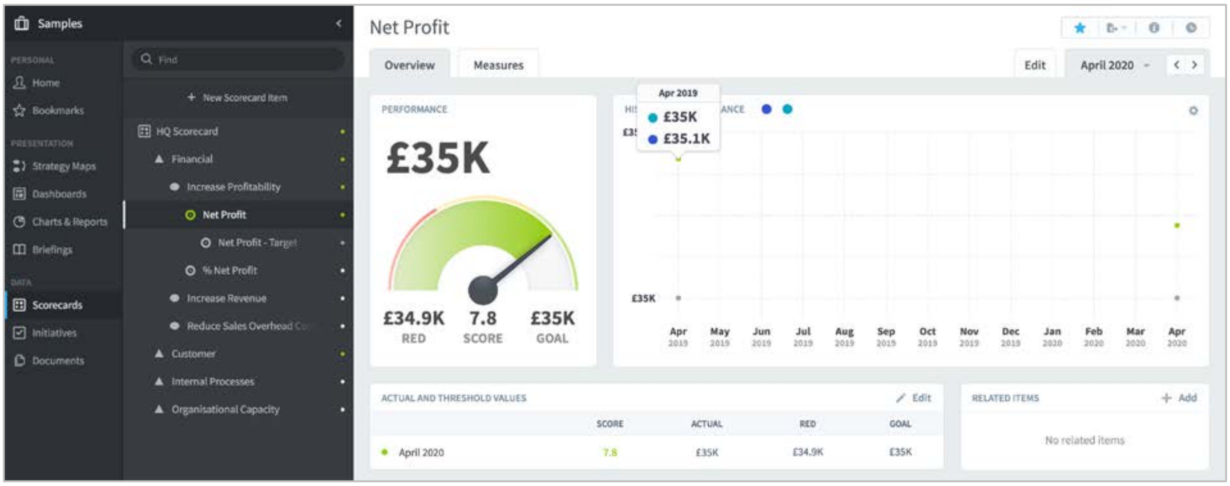
Click back to the main application. Click on Scorecards and then select the scorecard you have just updated to check the update has succeeded.

In our example, you can see that the April data has been loaded. For the KPI/measure **Net Profit** we also added the Goal/Red Flag thresholds:



A completed measure in a scorecard might look like this: