

GETTING STARTED

Version 4.0

A STEP BY STEP GUIDE

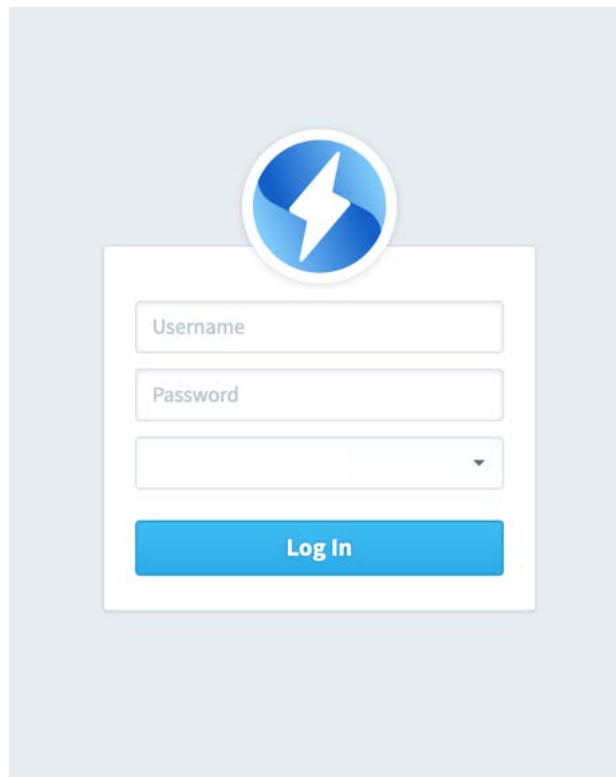


Signing In

Spider Impact™ is a corporate performance management software package written by Spider Strategies® and aimed at organizations that are defining and executing a strategy.

Click on the link provided to reach the login panel. The link format will be:

Spider Impact: www.your-company-name.spiderbsc.com

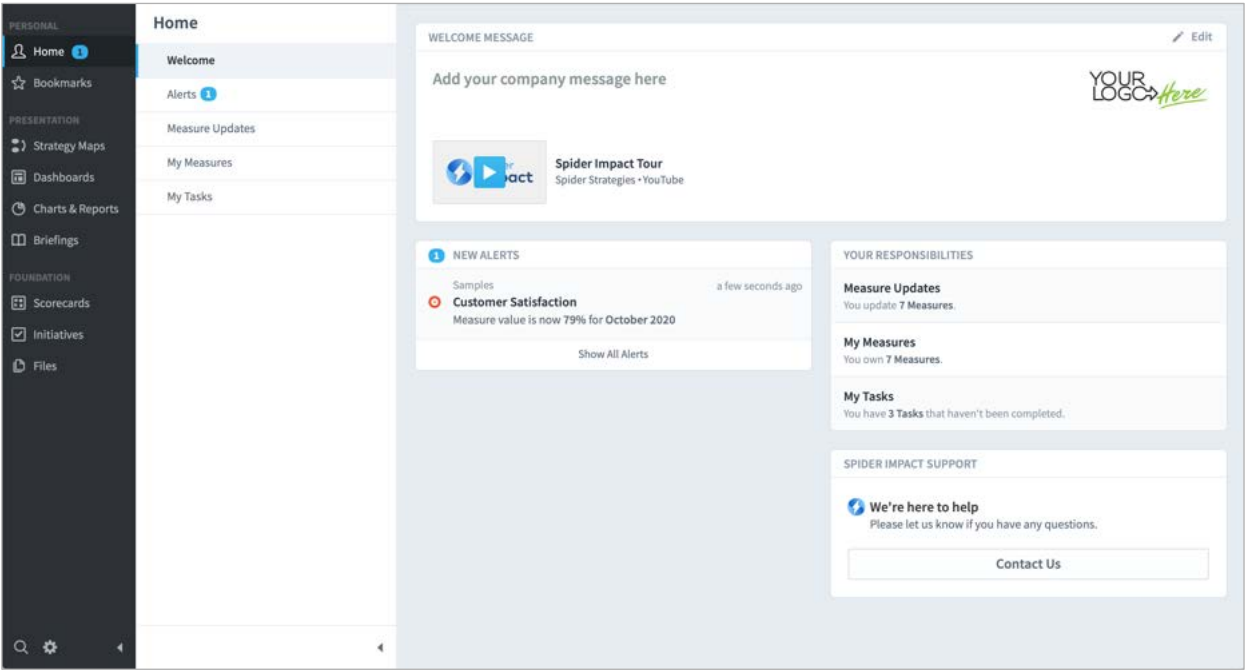
The image shows a login panel for Spider Impact. At the top center is a circular logo with a blue background and a white lightning bolt. Below the logo is a white rectangular box containing the login form. The form has three input fields: the first is labeled 'Username', the second is labeled 'Password', and the third is an empty field with a small downward arrow on the right side, likely for a dropdown menu. Below these fields is a blue rectangular button with the text 'Log In' in white.

- Enter your **Username** and **Password** and click **Login**
- You may be asked to change your password at this stage



Welcome Screen

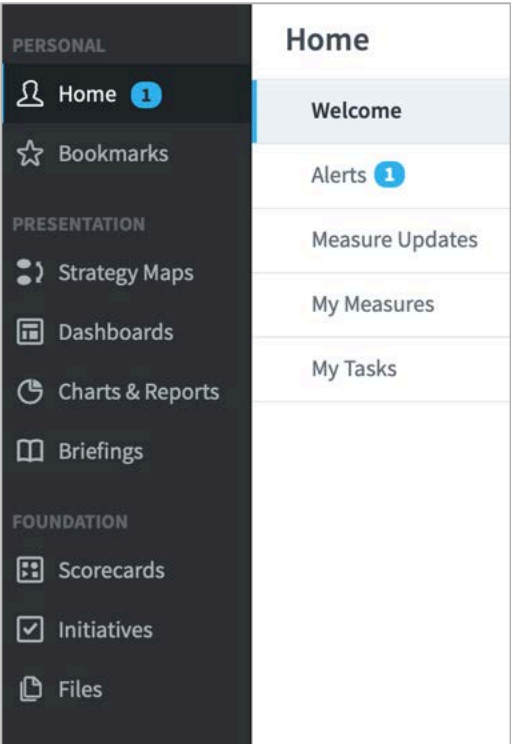
On entry to the application, you will see a screen like this. To the left is the main menu and to the right some information about your activities, tasks and metrics. As you use the application, more information will appear on this screen.





Navigation - 1

Before navigating around the application you need to know how information is created and stored. First, sign-in to the application.



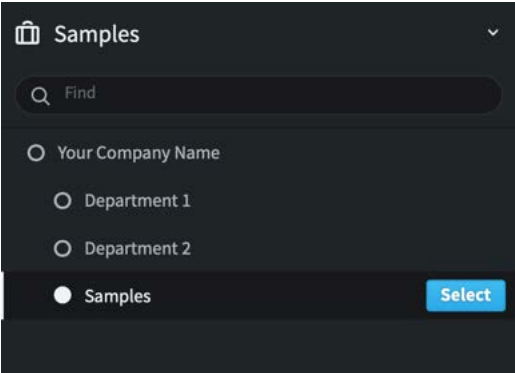
In the main menu to the far left you will see a list of the Object types that can be created:

- Strategy Maps (if included)
- Dashboards
- Charts & Reports
- Briefings
- Scorecards
- Initiatives
- Files



Navigation - 2

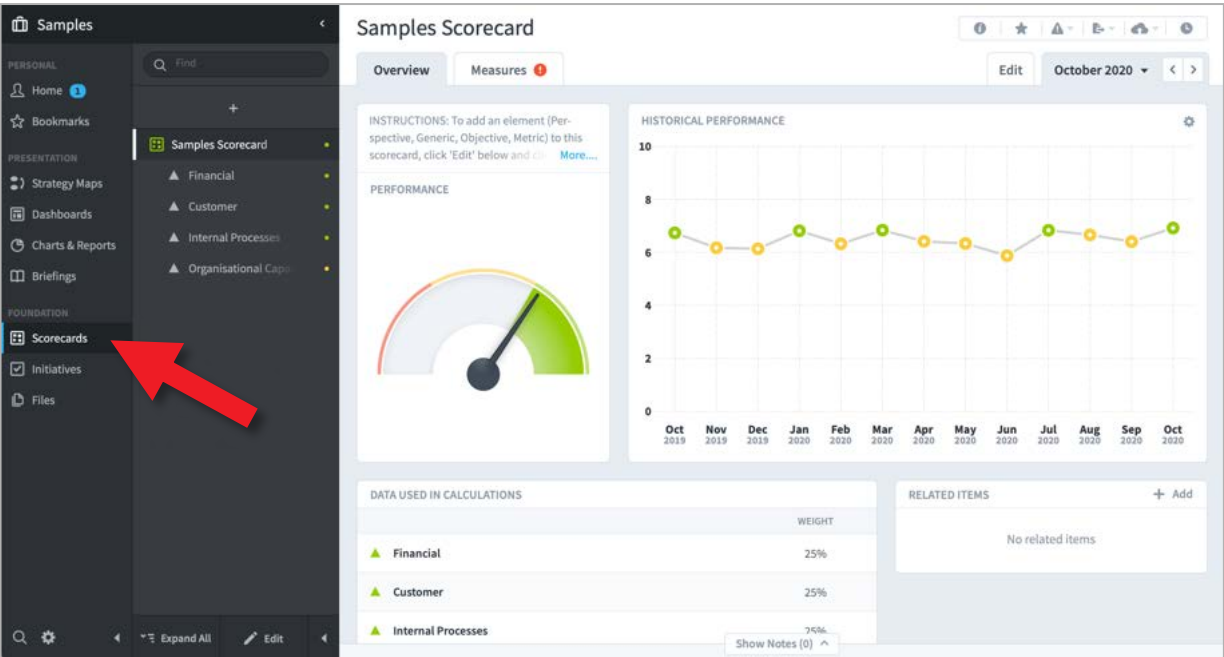
On entry to the application you can view a list of **Organizations** by clicking on one of the navigation objects, for example Scorecards. The organization list will be revealed as a drop-down menu. If you have been working with the application already then click on the Briefcase icon to reveal the drop-down:



Click on **Samples** to highlight it and then the blue **Select** button.

The organization for Samples will appear, click on **Scorecards** to look at the scorecard.

The Scorecard view will appear. Notice that the Samples organization has appeared next to the briefcase icon at the top.



Note: there is a blue vertical stripe by the word **Scorecards** indicating you are in the Scorecards section.



Navigation - 3

The sub-menu that has appeared to the right of the main navigation menu is the Scorecard menu. You are in the Scorecard view. Click on the items to reveal the elements of the Scorecard:



Very Important: Your Briefcase contains Organizations which contain Scorecards, Dashboards, Initiatives, Charts & Reports and Briefings.

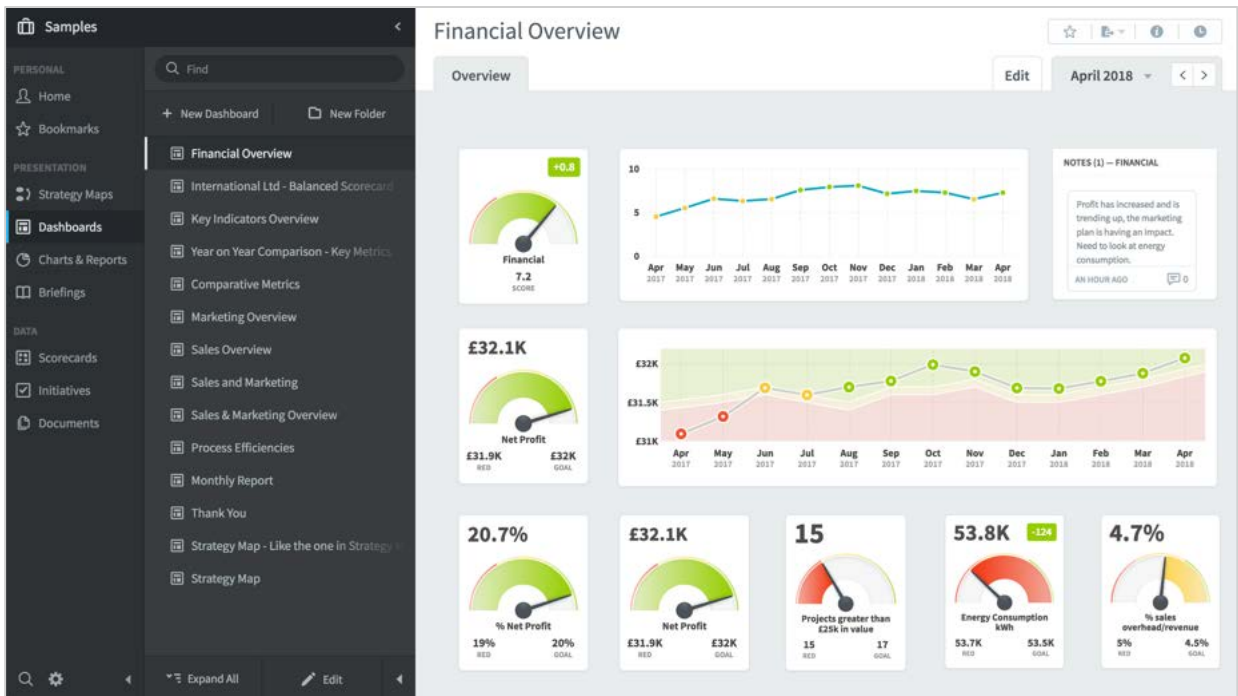
To look at other Organizations you need to click on the Briefcase icon (top-left) to reveal the Organization List.

This is a **key navigational function** of the application. You will be creating many Organizations over time.



Navigation - 4

Click on **Dashboards**. You will see a list of all the dashboards associated with the Samples organization. Select each Dashboard in turn.



When you have finished looking at Dashboards, do the following:

- Click on **Strategy Maps** to look at strategy maps (if selected),
- Click on **Initiatives** to look at the initiatives,
- Click on **Charts & Reports** to look at the reports,
- Click on **Briefings** to look at the briefings.

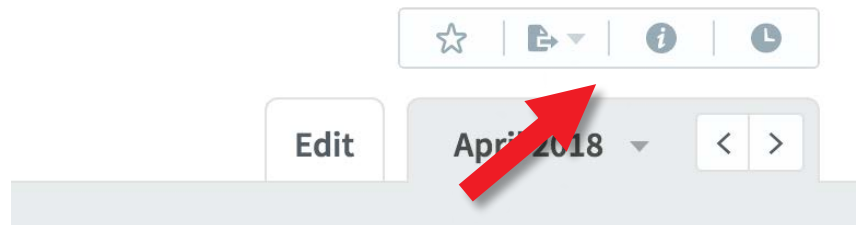
You have now looked at everything contained within the **Samples** organization. It is time to build your own set of Scorecards, Dashboards, Initiatives, Charts & Reports and Briefings.

You must start with an **Organization** and then add a **Scorecard**.







Navigation - 5

While looking at Scorecards, Dashboards, Charts & Reports, Initiatives (and Strategy Maps if you have the QuickScore module), you will notice at the top right of the screen there are four action buttons:



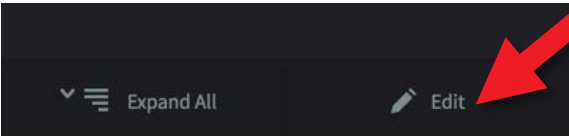
They have the following functions:

-  **Bookmark:** Add this page to the Bookmarks page. This is a toggle switch, if it is solid blue, the page has been added, if it is only in outline the page has not been added.
-  **Send To:** Send this page to the item in the drop-down list. This includes e-mail, printer, pdf, PowerPoint and png. While in Dashboards there is an extra option to send to a shared dashboard. There is a separate guide for Shared Dashboards.
-  **Information:** Reveals a panel with all of the information associated to the object you are looking at.
-  **History/Audit:** A complete history of changes made to the object you are looking at including date, person and nature of the change.



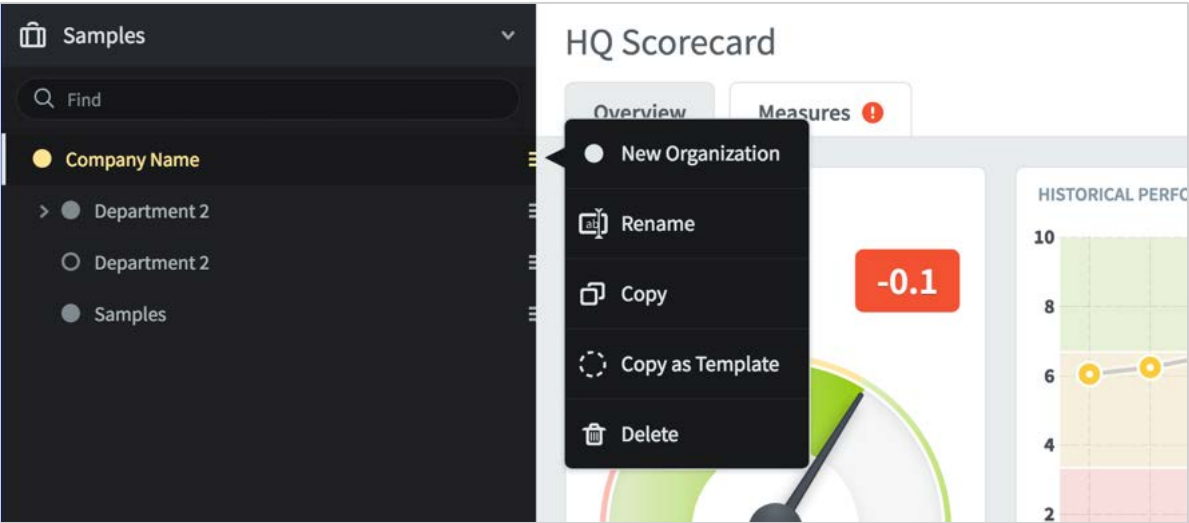
Add an Organization - 1

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.

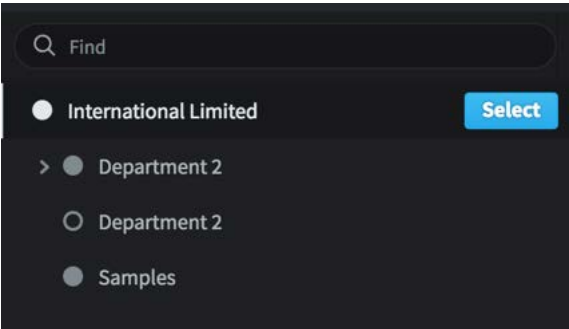
A pop-out menu will appear inviting you to create, rename, copy, copy as a template or delete an **organization**.



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.

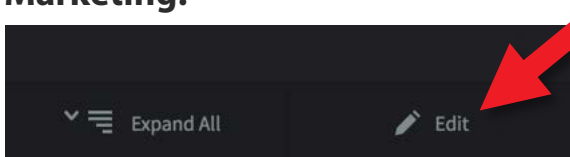


Your company name will appear and you will be asked to create a Scorecard.



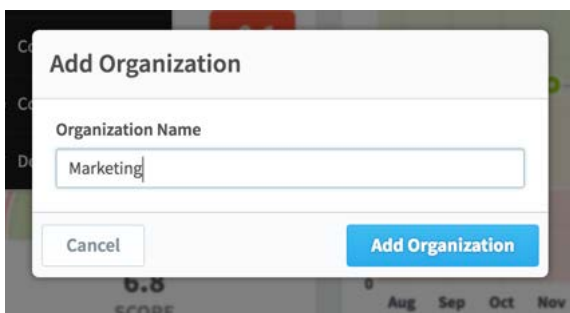
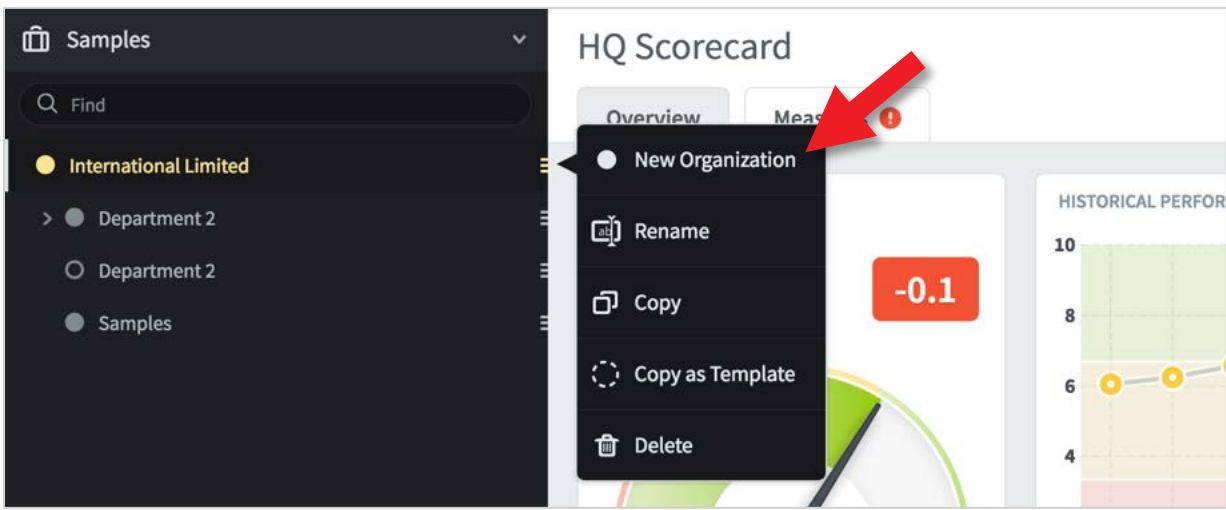
Add an Organization - 2

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.

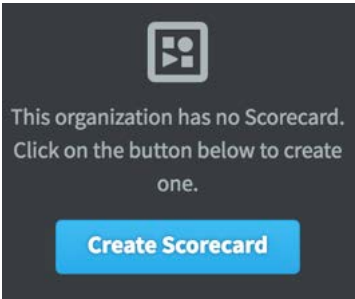


Create a Scorecard

Click on the Briefcase icon (top-left) and select the Organisation where you want to create a Scorecard.

Click on Scorecards, and the Create a Scorecard dialogue box will appear. Click the blue button.

Note: If a Scorecard already exists, you will be taken to the scorecard



Create Scorecard

Name

HQ Scorecard

Description

This is the overall Scorecard for International Limited and is used to provide a company overview by linking to other scorecards

Tags

HQ Scorecard

overview

Cancel

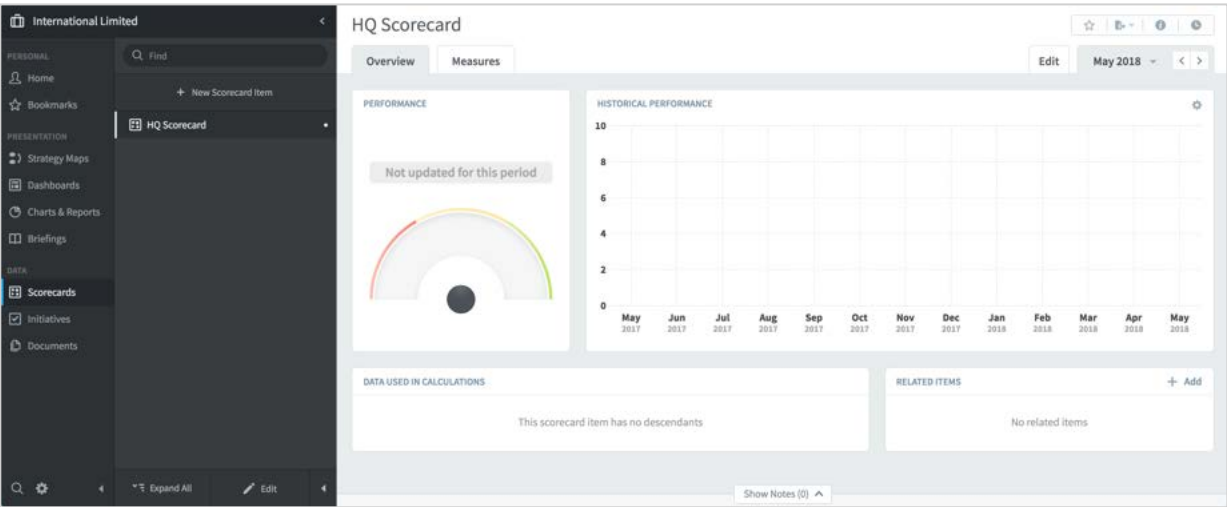
Create

Add the name of the scorecard (we have called this one HQ Scorecard) and add a description.

You can optionally add search Tags that can be used at a later date to search for this scorecard.

Click on the blue **Create** button to create the scorecard. Click on Cancel (bottom-right) then Overview (middle-top) to view the scorecard.

The Scorecard structure will be created as below. Please note, at the moment it contains no data - this will be derived from your Metrics at a later date:





Key Performance Areas/Objectives

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

Scorecard:

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

Balanced scorecard:

- 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:

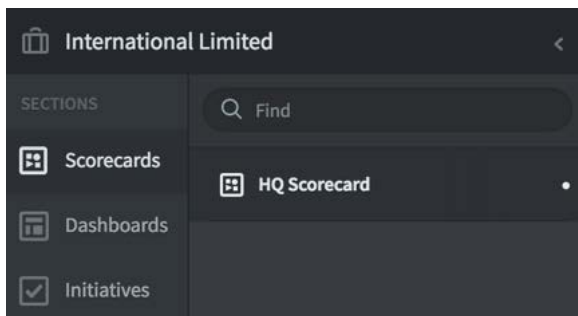
Scorecard

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



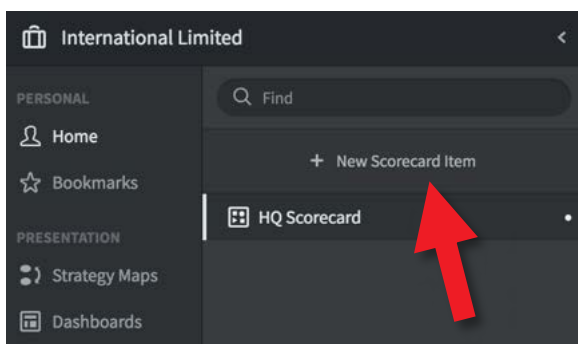
Key Performance Areas/Objectives

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**.

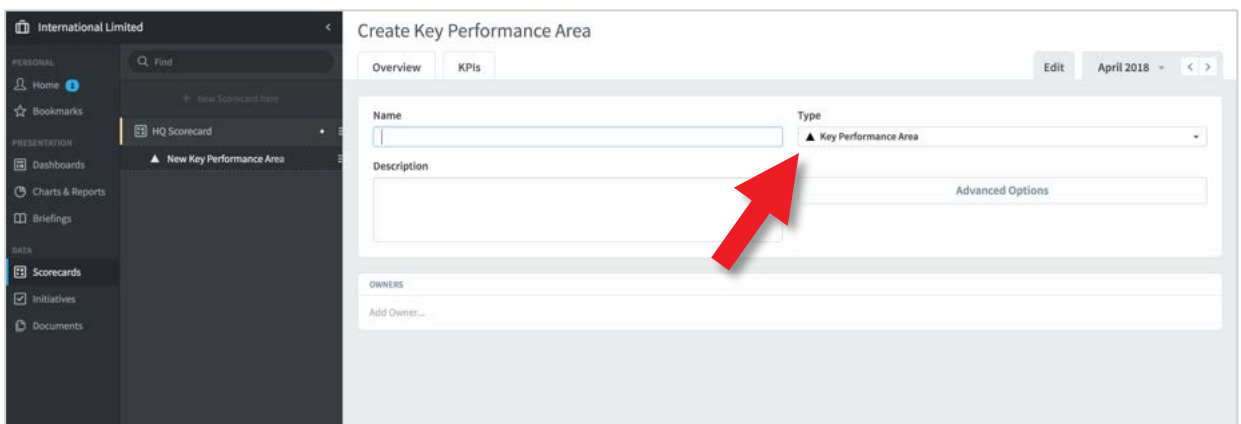
Click on the Scorecard object (in our example HQ Scorecard) so that it is highlighted.



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.





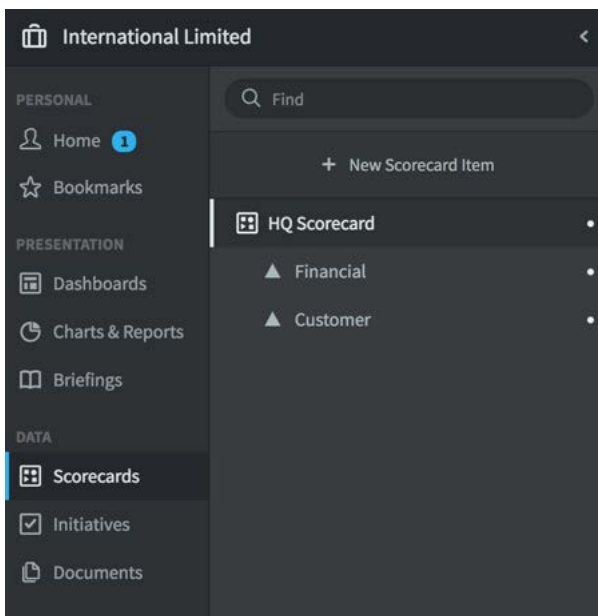
Key Performance Areas/Objectives

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**.

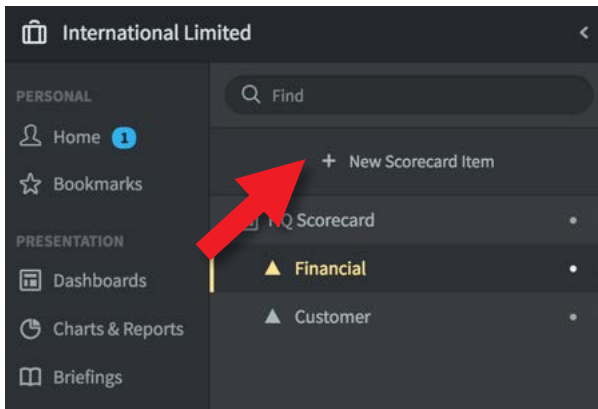
Finally click **Done** to come out of Edit mode.

Your scorecard so far will look like this.



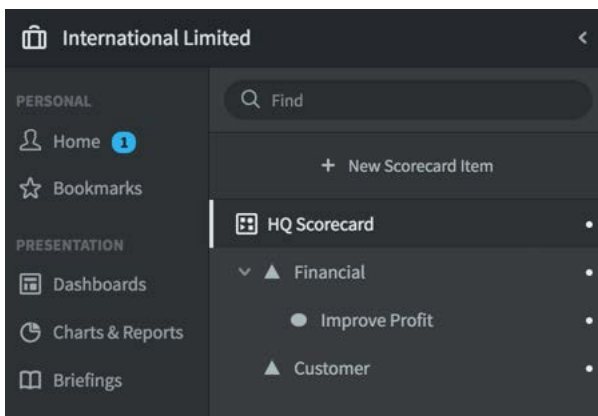
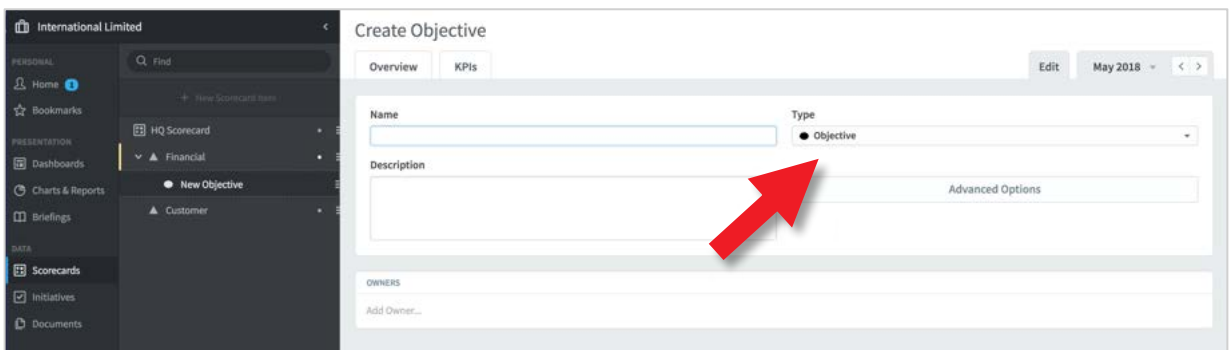
Key Performance Areas/Objectives

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.

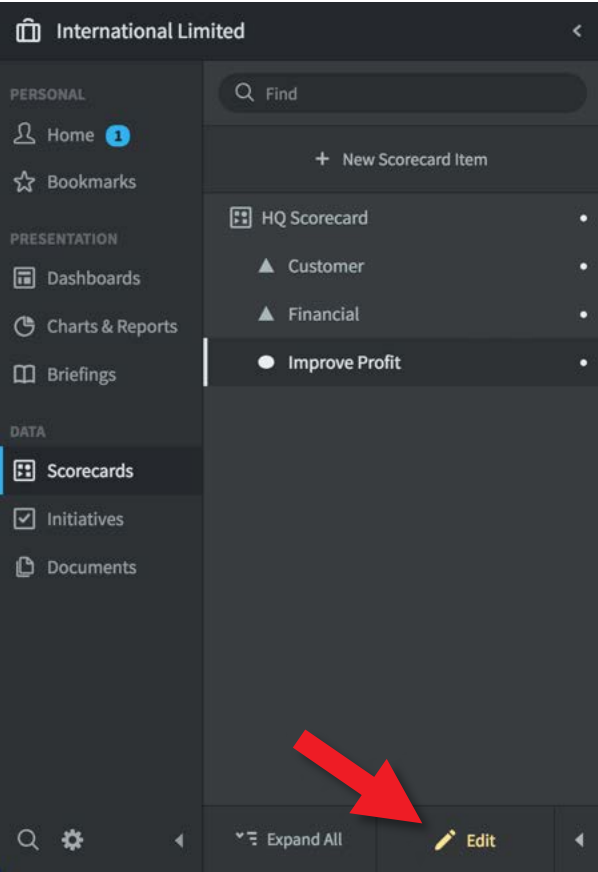
Click **Cancel** for now.

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



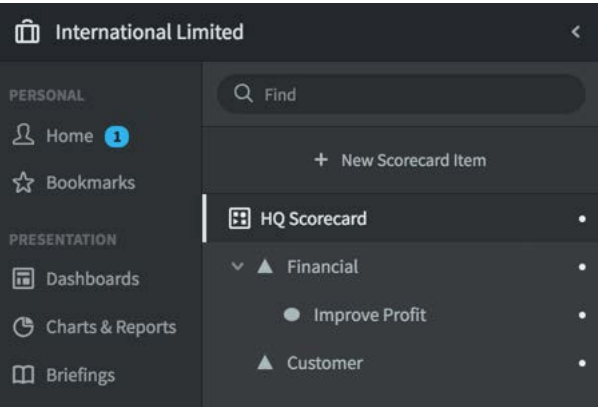
Arranging a Scorecard

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,

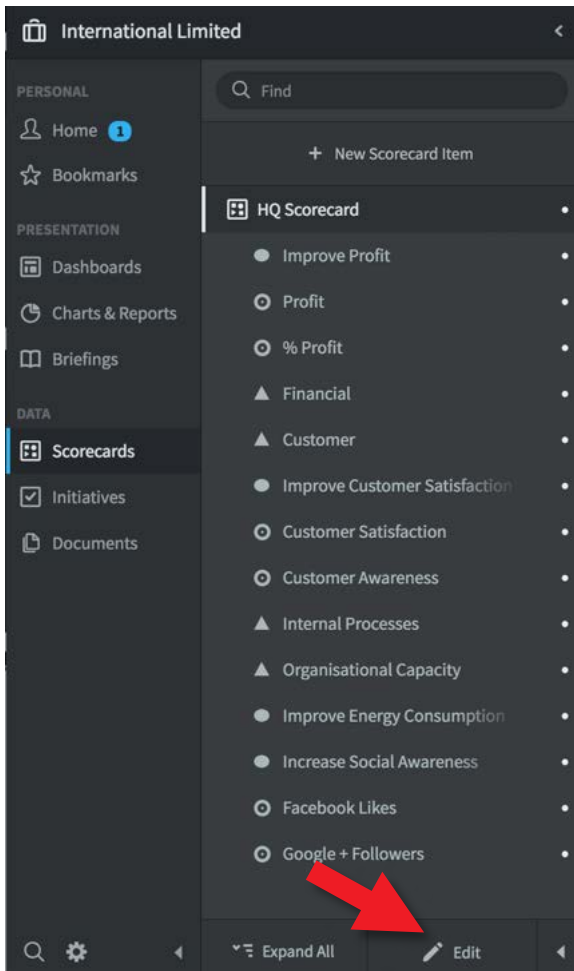
Click **Edit** at the bottom of the screen, drag and drop the objects to the correct place (to Tier an object, hold it over the upper-level and drop it) and click **Done**.



The result should look like this.



Arranging a Scorecard



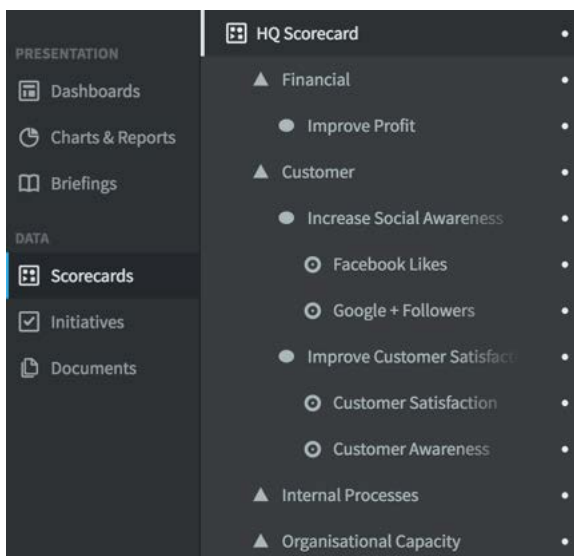
When you have added some items to your Scorecard it might look something like this.

You can add as many items to your scorecard as you wish.

At some point you may need to rearrange the items.

They can be moved and tiered.

Click Edit at the bottom of the menu list.



Drag and drop the items in the list to the correct places.

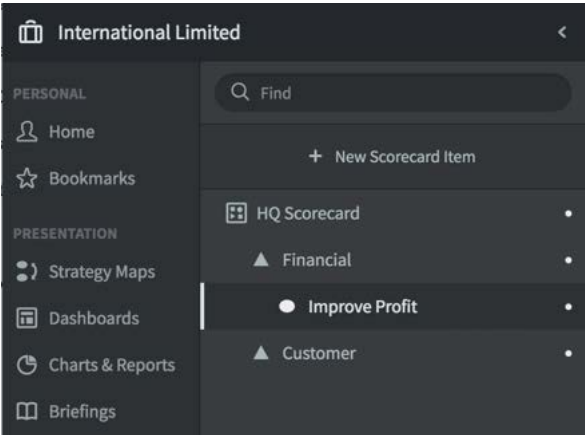
In this example the objects have been re-ordered and tiered to create the correct scorecard relationship.

Click **Done** at the bottom of the menu list when you have finished.



Creating KPIs/Measures - 1

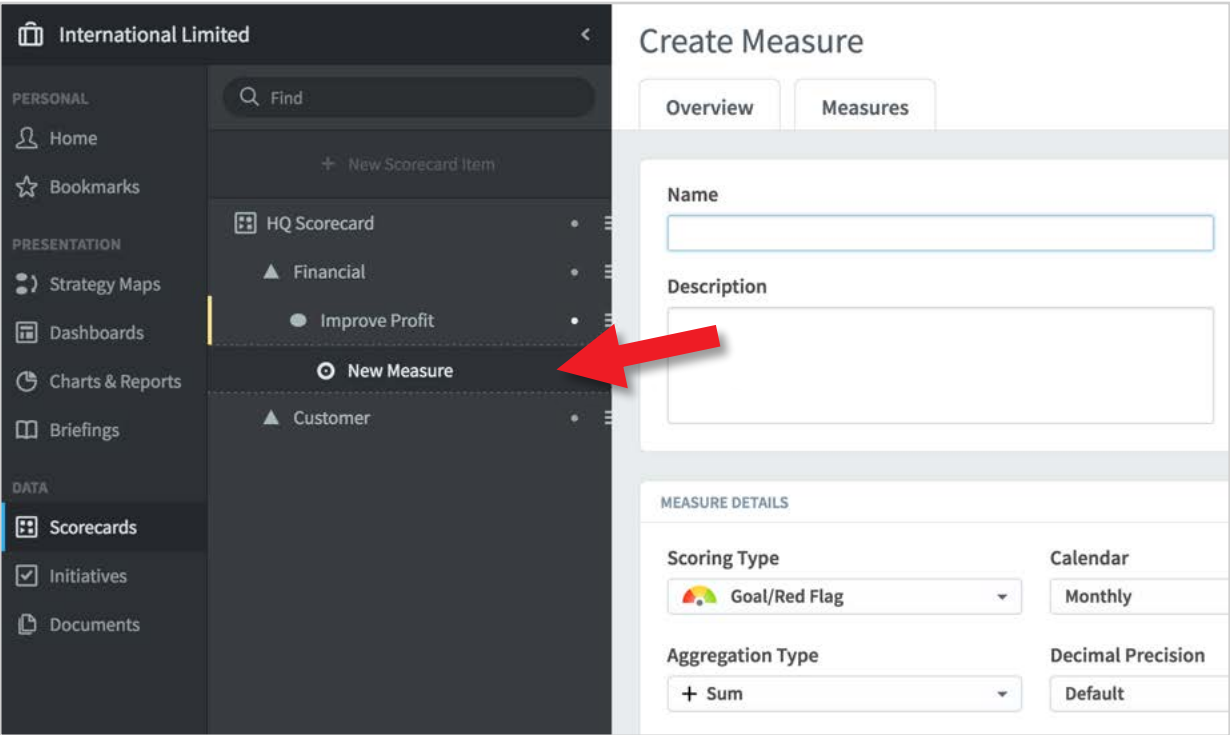
KPIs (in Scoreboard) or Measures (in QuickScore) can be added at any level in a scorecard. KPIs/Measures are the ‘engine’ of the scorecard. When you add actual values to KPIs/Measures, a score is generated and the whole scorecard will ‘colour-up’. To add KPIs/Measures you need to be an Administrator.



Click on the scorecard item under which you want the KPI/Measure to appear.

In our example we have highlighted **Improve Profit** and we will be adding the KPI/Measure **Profit**.

Click on the + **New Scorecard Item** button and the Create KPI/Measure dialogue will appear together with a New KPI/Measure under the Objective:





Creating KPIs/Measures - 2

You do not have to provide all of the details at this stage, but there are a few things you will need to add (the example below is from QuickScore).

The screenshot shows the 'Create Measure' form in QuickScore. The form is divided into sections: Overview, Measures, and MEASURE DETAILS. The Overview section contains fields for Name (1), Type (2), Description (3), and Advanced Options. The MEASURE DETAILS section contains fields for Scoring Type (4), Calendar (5), Data Type (6), Aggregation Type (7), and Decimal Precision. The SERIES section contains fields for Actual Value (8), Red Flag (8), and Goal (9). The OWNERS and UPDATERS sections are at the bottom. The form has a Cancel button and a Create button at the bottom right.

Follow this sequence:

1. Give the KPI/Measure a name - this should be a label 3-5 words long.
2. Select the Type - this should be KPI for Scoreboard, Measure for QuickScore.
3. Provide a description - this is optional but it is good practice to provide a description which includes where the KPI/Measure data can be found.
4. Select the Scoring Type - the scoring type can be one of eleven types. On most occasions this will be Goal/Red Flag (Red/Amber/Green).
5. Select the Calendar - this relates to the frequency the data is collected, normally monthly for general management reporting.



Creating KPIs/Measures - 3

6. Select the Data Type - the application can handle Currency, Percentage, Numeric and Yes/No data.
7. Select the Aggregation Type - this tells the application what to do with actual values when looking at them using a calendar other than the frequency collected calendar previously selected.

For example, for a **Currency** the aggregation type is normally **Sum**. When looking at monthly data with a yearly calendar, you want the application to sum the months.

For a **Percentage** the aggregation type is normally **Average**. When looking at monthly data using a yearly calendar, you want the application to take an average over the months.

Thresholds: You need to tell the application when you expect a KPI/Measure to turn red (from amber) and green (from amber):

8. Add the Red Flag threshold. For example, if the KPI/Measure is deemed to be Red below \$25,000, the the Red Flag value is \$25,000.
9. Add the Green Flag threshold, this is usually the target.
10. Optionally add the Owner (this can be done later).
11. Optionally add the Updater (this can be done later).

Very Important:

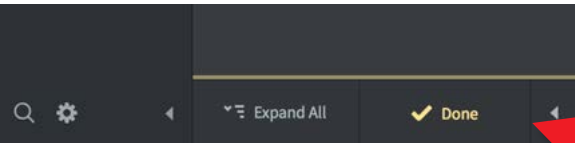
- **When you have entered all of the data click the blue Create button**

You will be given the opportunity to add another KPI/Measure, a blank Create KPI/Measure screen will appear. Add as many KPIs/Measures as you need.



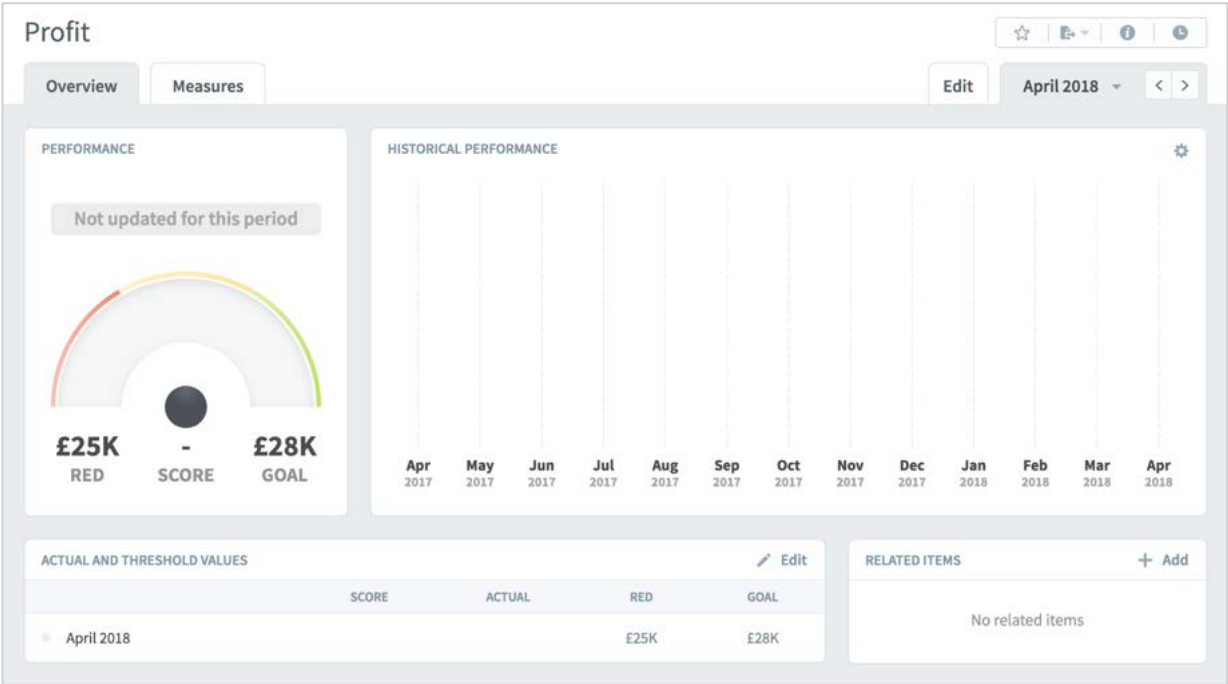
Creating KPIs/Measures - 4

Once you have added all of your KPIs/Measures, you can come out of Edit mode.



When you have finished, click **Done** at the bottom of the menu list.

The resulting KPI/Measure should look something like this:



You can see in this example the KPI/Measure is called Profit and the thresholds have been set a \$25k for red and \$28k for green.

You can add more KPIs/Measures by going back to the beginning and repeating the process.

The next step is to add some Actual Values - Go to the Adding Actual Values user guide



KPI/Measure Details

These parameters appear in the **KPI/Measure Details** and **Series** panels:

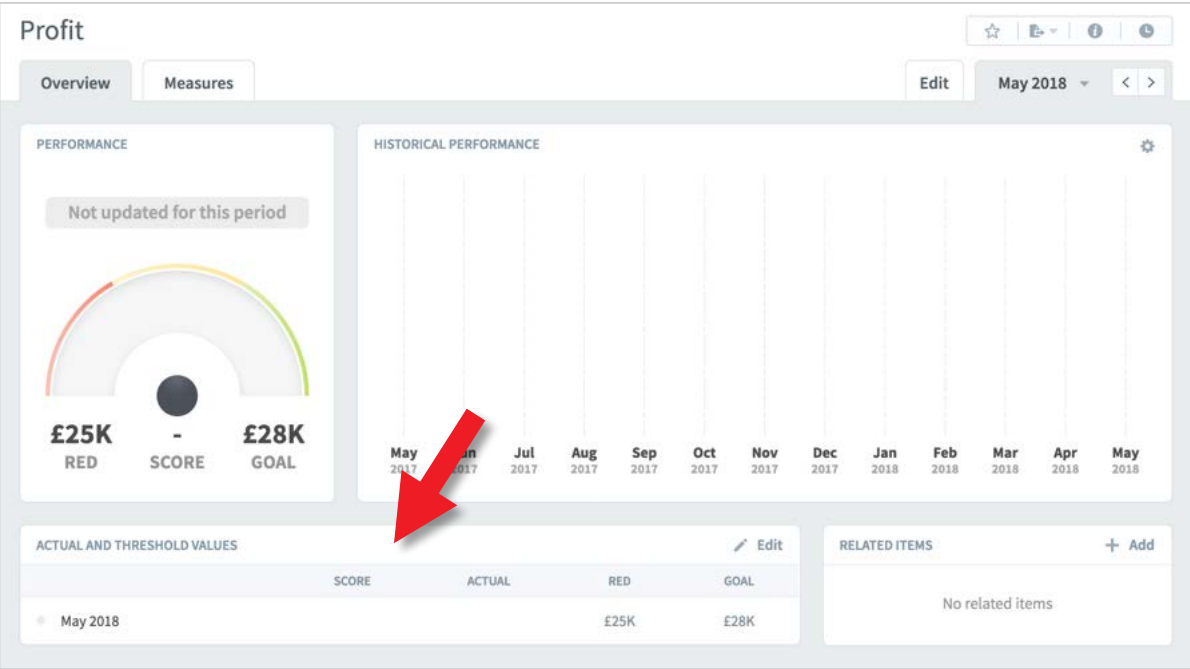
- **Scoring Type:** usually Goal/Red Flag, select from the list
- **Calendar:** Monthly, Quarterly, Yearly or user defined
- **Data Type:** select from one of the three options:
 - *Number* - numerical data, e.g. number of call received
 - *Percentage* - any percentage value, e.g. %Net Profit
 - *Currency* - a number expressed in currency e.g. USD or GBP
- **Aggregation Type:** How to aggregate for a different calendar view
 - *Sum* - data added monthly will be summed up when viewed quarterly or yearly e.g. Revenue is usually defined as Sum
 - *Average* - data that is added monthly will be averaged when viewed quarterly or yearly - e.g. %Net Profit is usually averaged
 - *Last Value* - the last value added will be used when viewed quarterly or yearly - e.g. Cumulative Sales is usually set to Last Value
- **Decimal Precision:** The default can be set in Administration
 - If you require anything other than the default, the decimal precision can be set here with a numerical value e.g. 0, 1, 2 etc.
- **Actual Value:** Manual or Calculated
 - It is possible to use a calculation, this is covered in advanced functions
- **Red Flag and Goal:** When measures turns Red, Amber or Green
 - The application bases all of its calculations on this setting. You need to determine when a performance measure is good, indifferent or bad, that is; Green, Amber or Red. For the Goal Red Flag measure this requires two values:
 - *Red Flag*: when the performance measure turns Red
 - *Goal*: when the performance measure turns Green



Adding Actual Values - 1

There are several ways to add **Actual Values** to the system. The process can also be automated pulling data from other systems. For more information on automation read the **Automated Adding Actual Values** guide.

The simplest way to add Actual Values is to go direct to the KPI/Measure itself. In the Overview there is an area called **Actual and Threshold Values**:



Click on the **Edit** icon in Actual and Threshold Values and a pop-out dialogue will appear.

Add the Actual Value for the month stated in the pop-out and click **Save**.

The value will now appear in the chart.

Note: If you have permissions to do so, you can also change the threshold values - this only changes the threshold value for the specific month. It does not change the default values.



Adding Actual Values - 2

The second way to add actual values requires that a KPI/Measure has been assigned an **Updater**. Read the **Owner and Updaters guide** to see how to assign an Updater to a KPI/Measure.

If you have been assigned as an Updater you can click on the Home button in the main menu and on the right hand side of the screen you will see the following:



for **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.



for **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 **KPIs I Update** for Scoreboard or **Measures I Update** for QuickScore.



Adding Actual Values - 3

All of the KPIs/Measures that have been assigned to you will appear in a list ready to be updated:

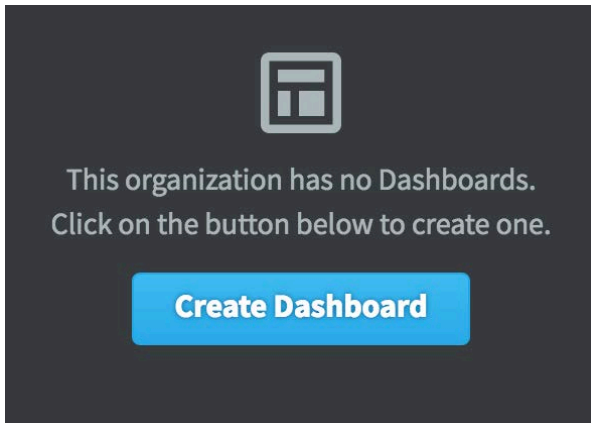
Metric Updates		All Organizations	November 2016		<div><</div> <div>></div>	
METRIC	PERIOD	ACTUAL	THRESHOLDS			
SAMPLES						
Number of calls made	November 2016	470	<div><div></div><div>450</div><div>500</div><div></div></div>			
Conversion rate	November 2016	41%	<div><div></div><div>30%</div><div>40%</div><div></div></div>			
% templates used in sales process	November 2016	77%	<div><div></div><div>60%</div><div>75%</div><div></div></div>			

In the example above, the thresholds have been shown, but they have a grey background. In this instance, the Updater has not been given permission to update threshold values, only Actual Values.

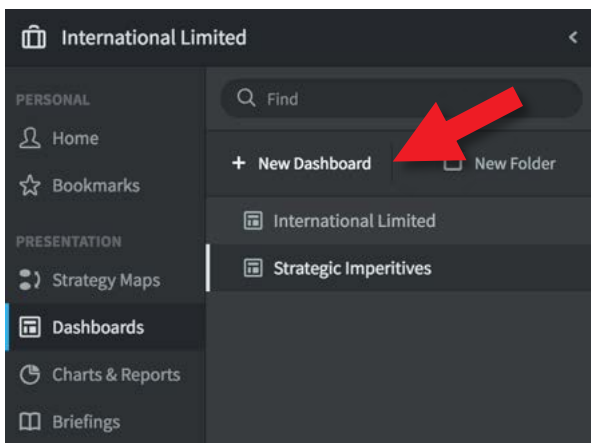


Dashboards- 1

Together with Scorecards, Initiatives and Reports, **Dashboards** can be added into an Organization container. First click on the Briefcase icon at the top-left of the screen and select an Organization into which you want to add a dashboard. You need to be an Administrator to create dashboards



If this is the first dashboard in the Organization selected, click on the blue Create Dashboard button and miss the next step.



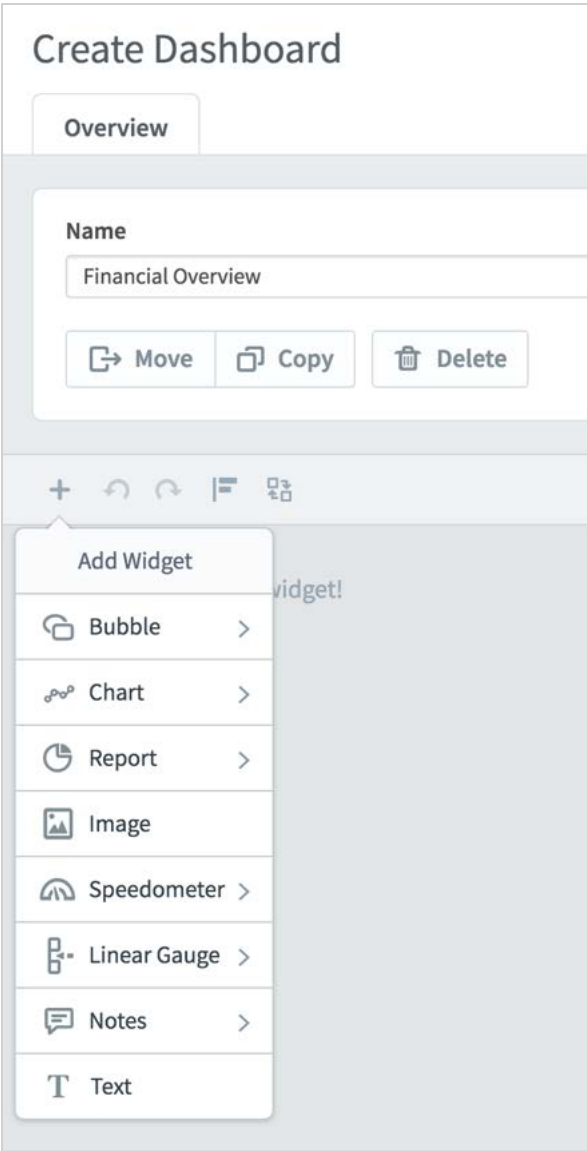
If this is not the first dashboard in the selected Organization, then click on **+ New Dashboard**

The Create Dashboard dialogue will appear, give the dashboard a name and click create. This will take you into dashboard edit mode.



Dashboards - 2

Dashboards are created by adding **Widgets**.



Click on the + button, the widget list will appear. You can add many different items to a dashboard.

The items you add will derive their data from other objects in the system. To see a full list, click on Bubble.

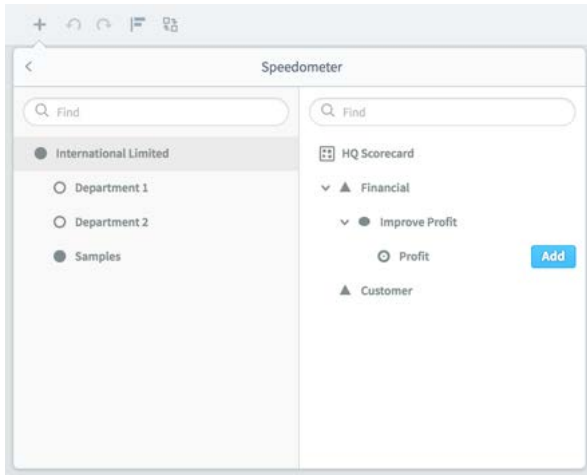
For this example we will add a Speedometer. The process used to add objects is the same for most objects.

Click on **Speedometer**.

The scorecard menu structure will appear

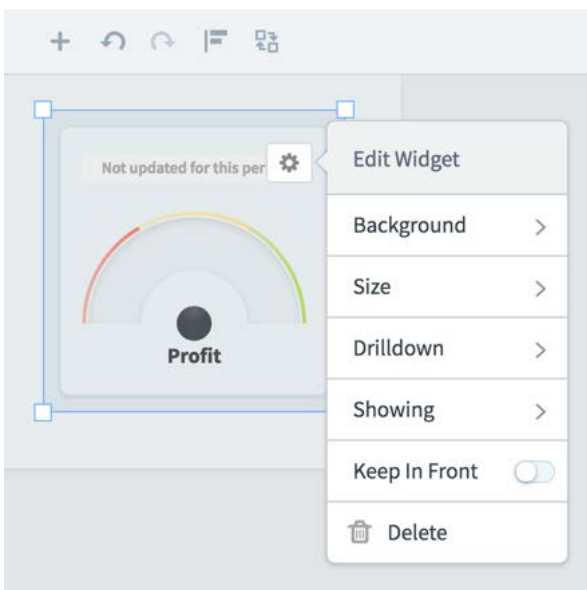


Dashboards - 3



Open out the scorecard by clicking the chevrons next to the objects. Select the object you want to display. In this case we will select **Profit**. Click on **Add**.

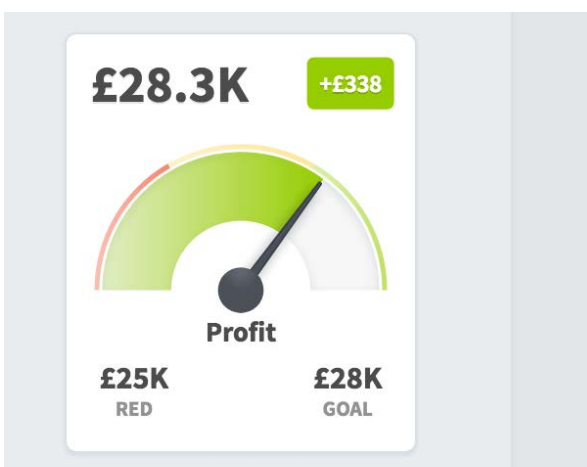
The dialog box will remain open. You can Add multiple objects to save time.



Click the **+** icon to close the dialogue. The speedometer has appeared. You can change its properties by clicking on the Cog icon at the top-right of the object.

You can also drag and drop the object and resize it.

Important Tip: Click **Save** frequently when designing dashboards, do not wait until you have completed the process!

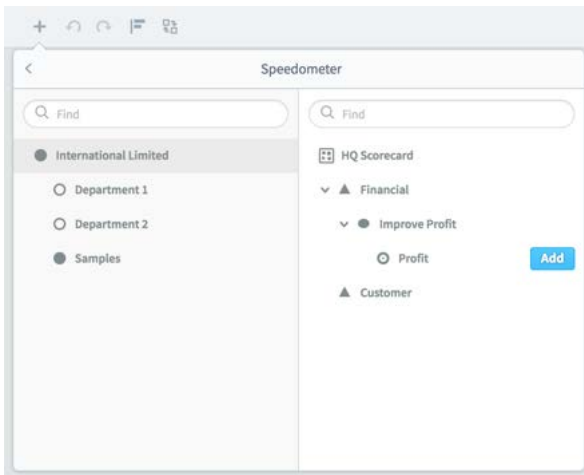


The finished object should end up looking something like this (after some actual values have been added).



Dashboards- 4

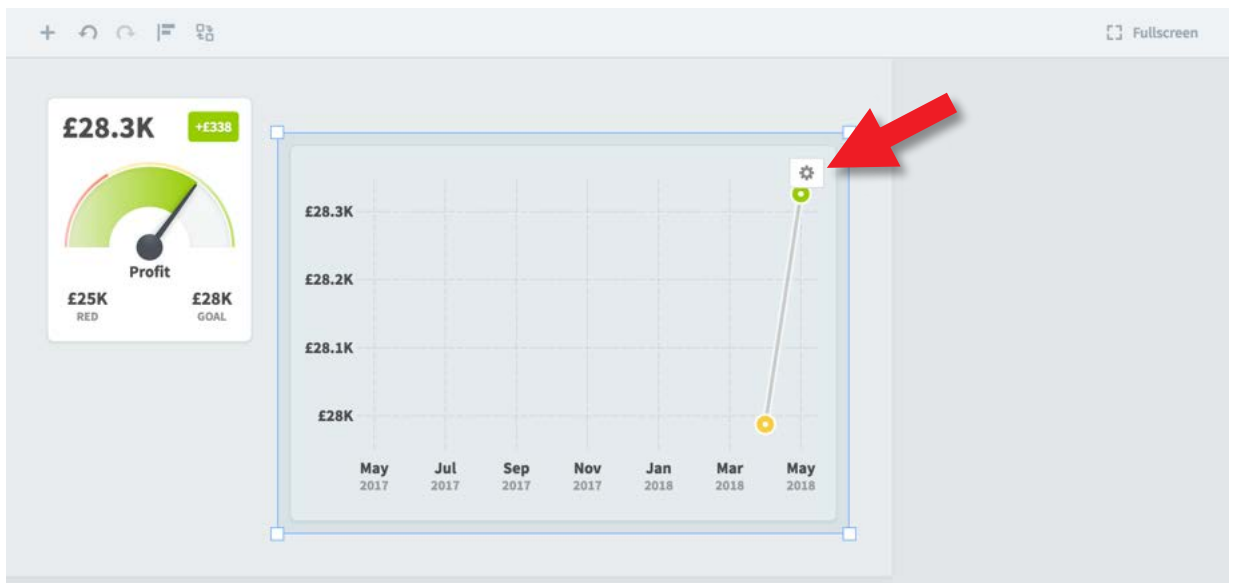
Adding a Chart to a dashboard requires a couple of extra steps. First click on the **+ Icon** and select **Chart**. You will notice that you can add charts from Scorecards and Initiatives. For this example we will select Scorecard Item:



Once again we will navigate to the correct item in the scorecard, Profit, and click on the Add button and then the + Icon to close the dialogue.

TIP: click on **Fullscreen** to go into full screen mode when designing dashboards

The chart appears and as before you can move and resize it and click on the cog icon to change its properties.

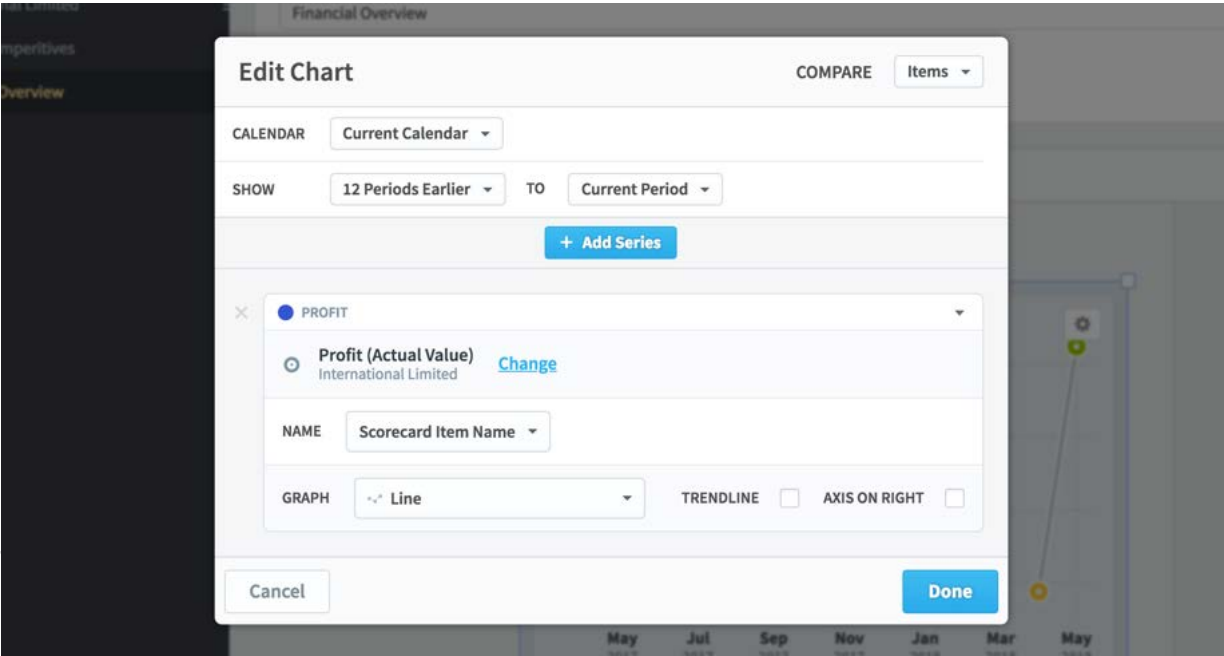


Unlike other objects, with charts you can select Edit Chart and change a set of chart specific properties.

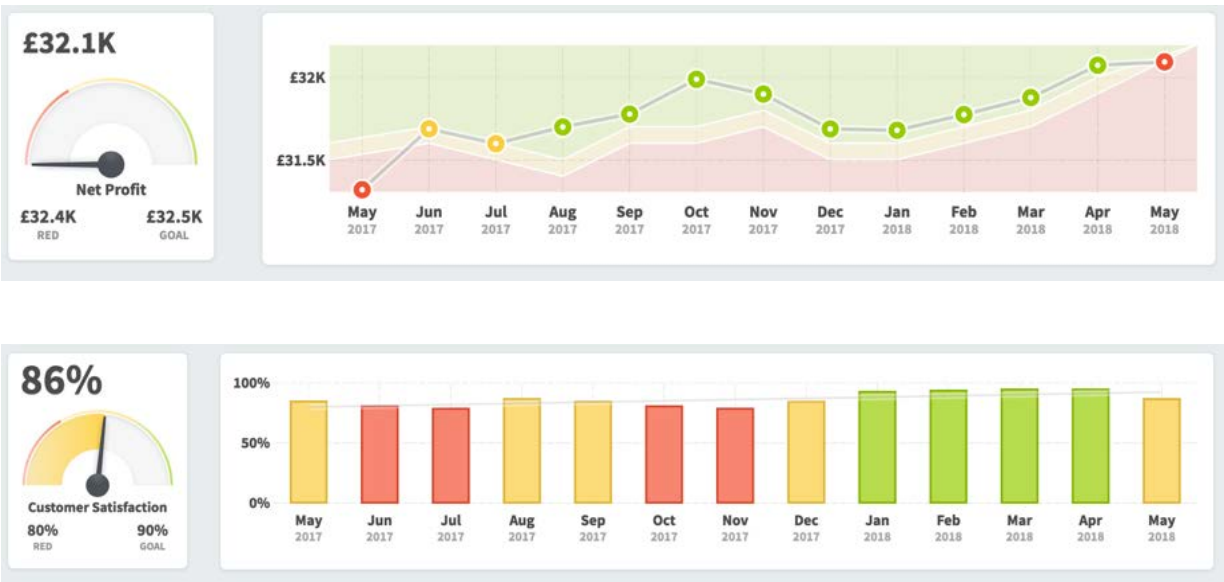


Dashboards - 5

The Edit Chart dialogue allows you to change the calendar and dates shown, add overlay series, add a custom name, select various line, bar and pie chart types, add a trend line and a right hand axis.



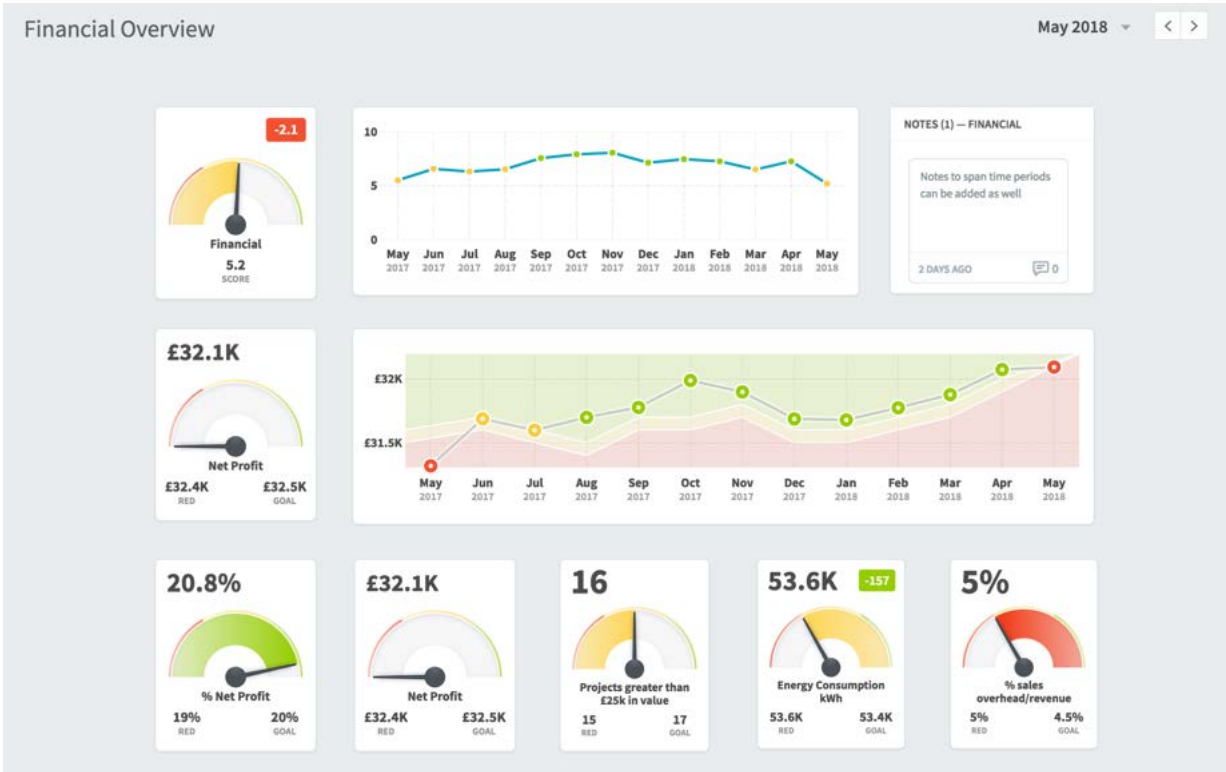
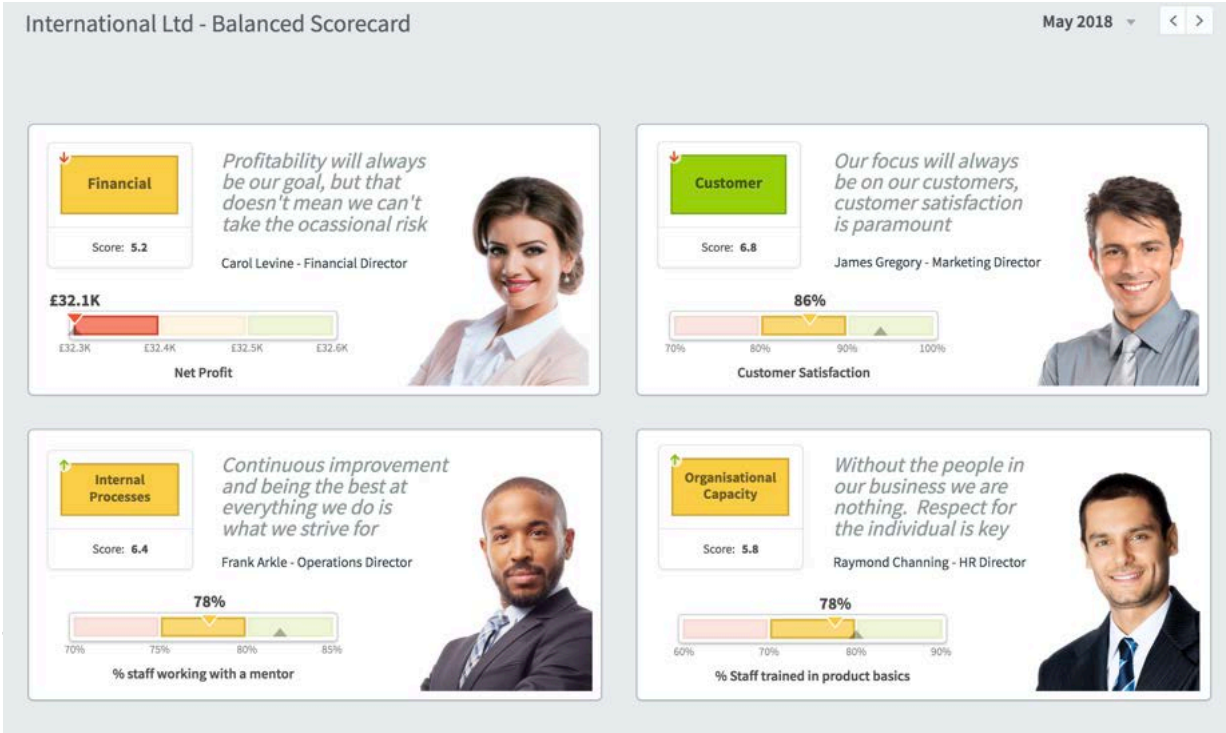
The result may be that you end up with a charts that look like this:





Dashboards - 6

There are many types of dashboard you can create, here are some examples:





Dashboards - 7





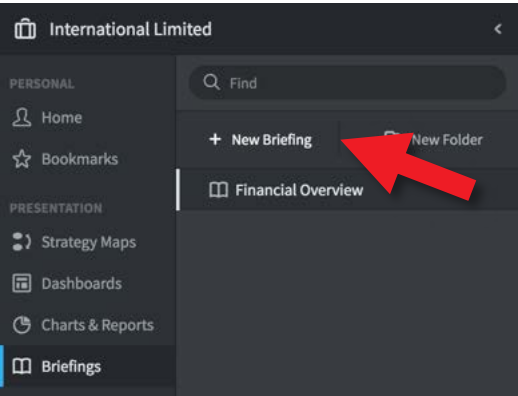
Briefings - 1

A **Briefing** is a collection of **Dashboards, Reports, Initiatives and Scorecard** elements that have been combined into a single **Briefing** document that can be displayed as an on-line presentation or exported as a document.

Together with Scorecards, Dashboards and Reports, **Briefing** can be added into an Organisation. First Click on the Briefcase icon and select an Organisation into which you want to add a **Briefing**.



If this is the first Briefing in the Organisation selected, click on the blue **Create Briefing** button and miss the next step



If this is not the first Briefing in the Organisation selected, then click on **+ New Briefing**

The **Create Briefing** dialogue will appear and you will be asked to give the Briefing a name. Enter the name and click **Create**.

Create Briefing

Name

International Ltd Monthly Report

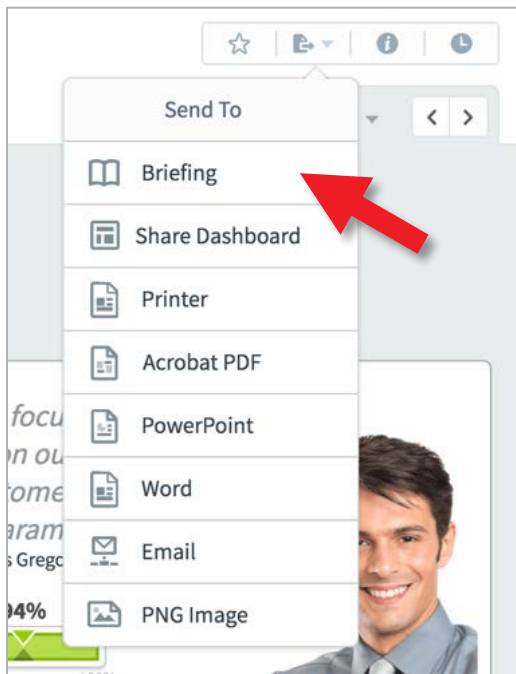
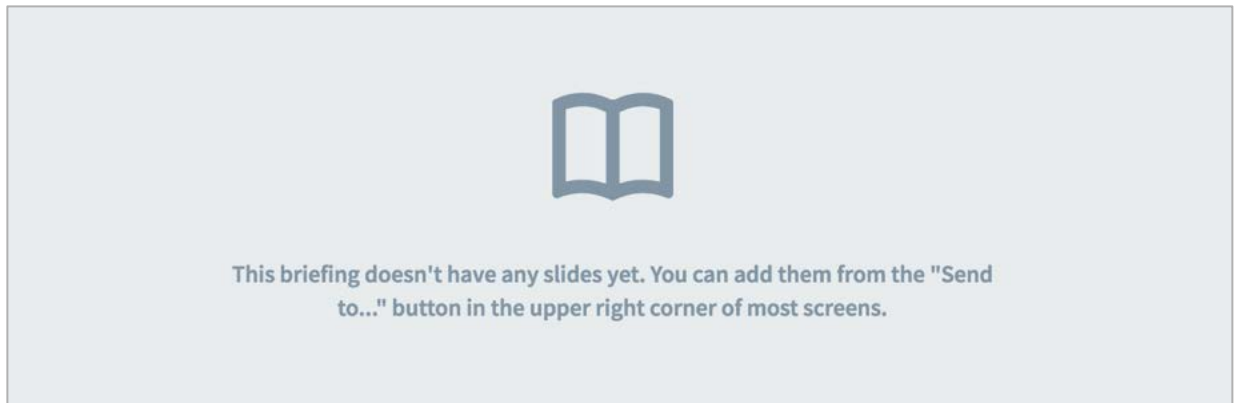
Cancel

Create



Briefings - 2

Unlike other sections that you create within an Organisation, the elements for a **Briefing** have already been created. You will see the following Screen telling you what to do next:



First check you are in the Samples organisation by clicking on the **Briefcase** icon and selecting **Samples** from the Organisation list.

Next click on **Dashboards**, we are going to add two Dashboards to the Briefing we have created. Select **International Ltd - Overview** in the Dashboards list.

At the top right is the **Send To** button. Click on it and a drop-down will appear.

Click on **Briefing** and the **New Briefing Slide** dialogue will appear



Briefings - 3

The **New Briefing Slide** dialogue will appear:

1. Name the slide as you want it to appear in the Briefing. Leave it as International Ltd - Overview for this example.
2. Set the calendar period. Leave it as Current Period.
3. Select the **Briefing** into which you want the slide to appear. Select International Limited on the left and select International Ltd Monthly Report on the right. Click on **Save**.

The dashboard will be saved in the Briefing List.

Go through these steps again and select a different **Dashboard**.

Do the same thing, but select an **Initiative**.

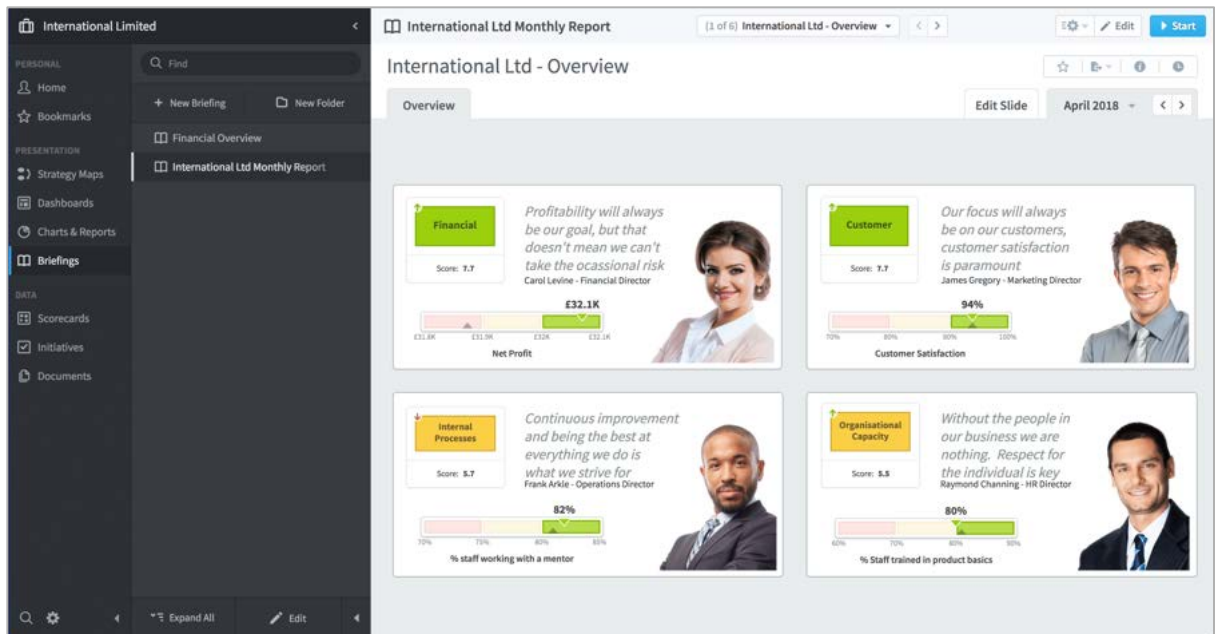
Do the same thing, but select a **Report**

When you have selected a few Dashboards, Initiatives and Reports and sent them to the Briefing, click on **Briefing** in the main menu

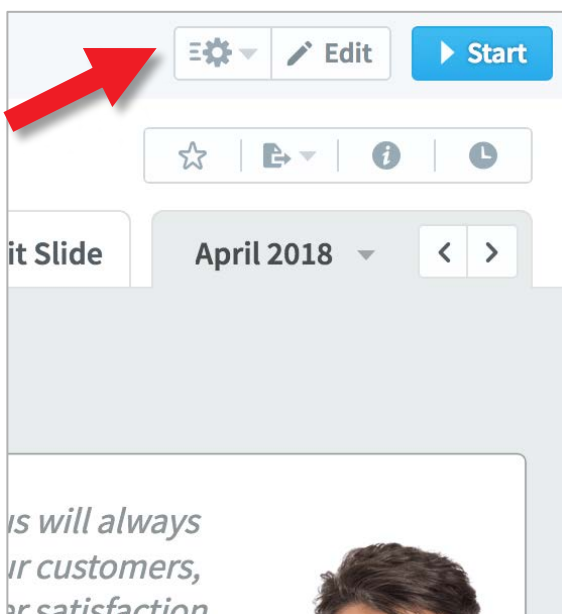


Briefings - 4

Check you are looking at the right **Organization** and then select **Briefings**. Click on the briefing you have just created,



The first slide will be showing, you can click through the slides using the chevrons next to the slide drop-down list at the top.



Take special note of the **Briefing Controls** at the top-right of the screen.

Start - starts and stops a full screen presentation.

Edit - change the slide order and names of the slides

Cog - send the entire presentation to a pdf or PowerPoint presentation (also shows audit history)