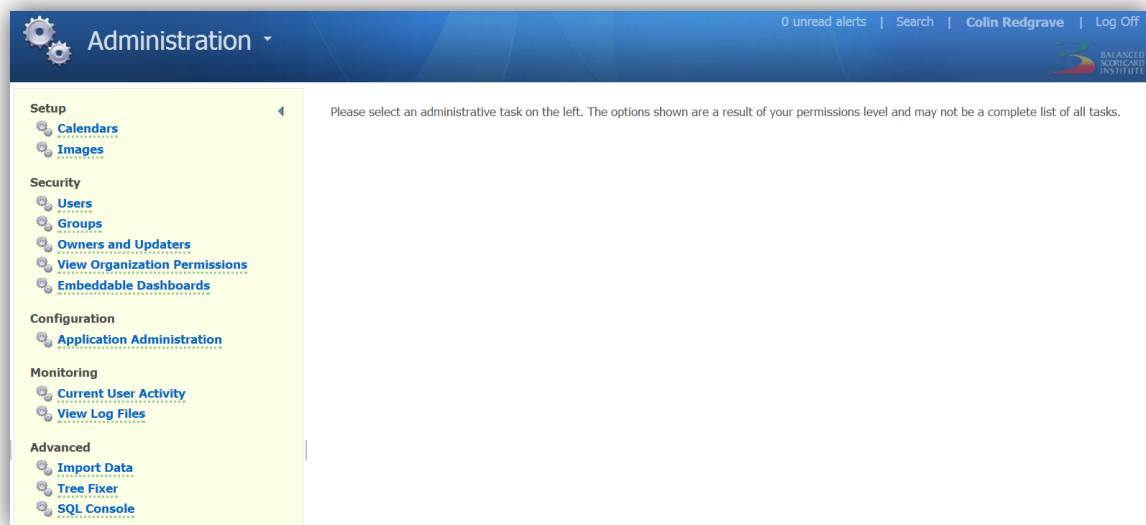# Administration - General

For specific Administration functions please refer to the QuickScore or Scoreboard Administration Manual. These Administration Quick Start Guides provide useful information about the most common activities only. Administration is only available to users who have been assigned Administration permissions. Upon entry, the Administration screen looks like this:

Setup

Calendars – The definition of standard and customer calendars. The system will come with default Monthly, Quarterly and Yearly calendars. Custom calendars e.g. country fiscal, can be easily defined. Calendars are primarily used as a means to view scorecards, objectives, metrics and dashboards. Calendars need to be extended periodically.

Images – Images can be uploaded into the system. They are primarily used as backgrounds or discrete images used in dashboards. Most image types can be uploaded and used. We recommend you use JPEG as this is a web-based application.

Security

Users – all users have to be defined to the system, please refer to the Quick Start guide Administration – Users and Groups, for full details on this subject. The New User entry panel looks like this:
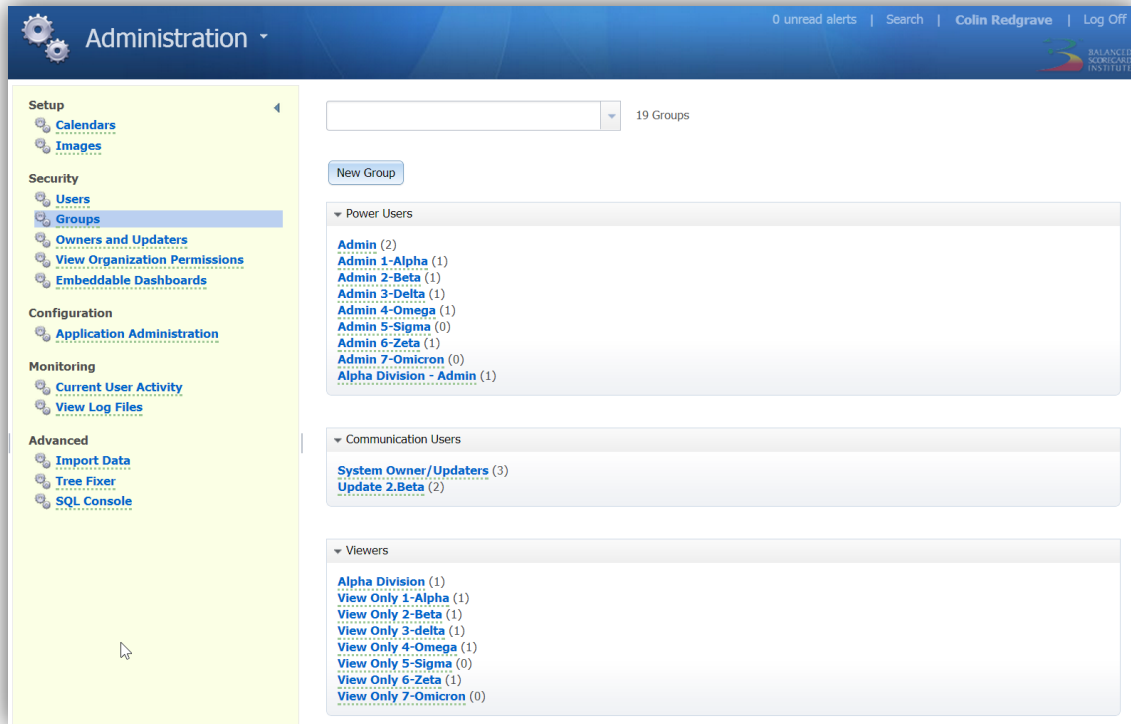
Groups

Once a user has been defined they **MUST** be assigned to a Group. Group can be created in three categories:
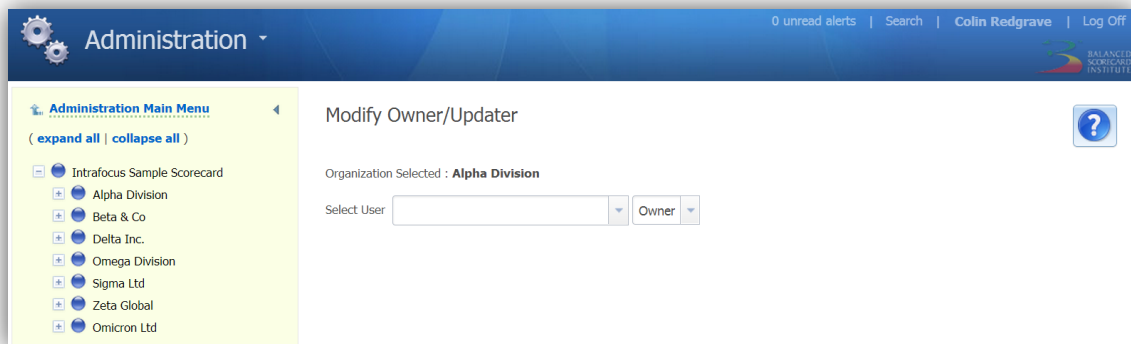
1. **Power Users** – these are the system administrators and scorecard builders. A Power user can create any object in the database including; scorecards, dashboards, reports and briefing books.

2. **Communication Users** – these are the 'updaters' who can update metrics with values, create notes against scorecard objects, create and assign tasks, create bookmarks and upload documents.

3. **Viewers** – these users can only view the system or selected parts of the system.

Please refer to the Quick Start guide Administration – Users and Groups, for full details on this subject. A typical group screen looks like this:
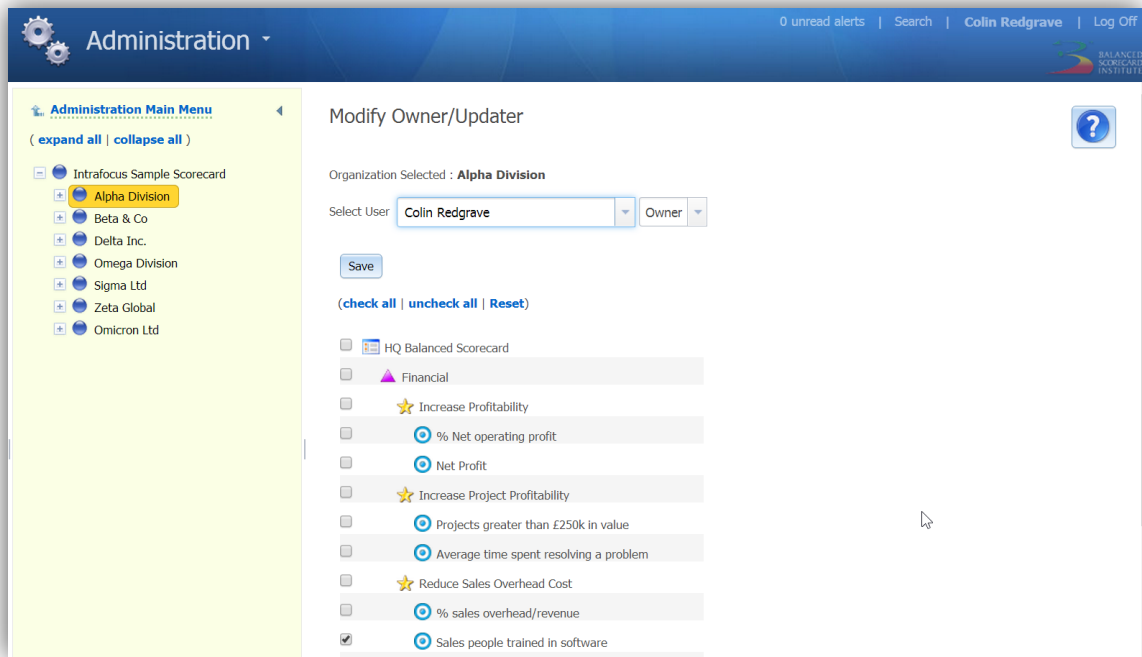
Owners and Updaters

You will have seen in previous Quick Start guides that any object within the system can have a defined owner. Any Performance Measure can have a defined Owner and Updater. These can be assigned while creating individual objects or they can be assigned in bulk using the Owner and Updater function in Administration. Click on the Owner and Updater link under Security you will see a screen like this:
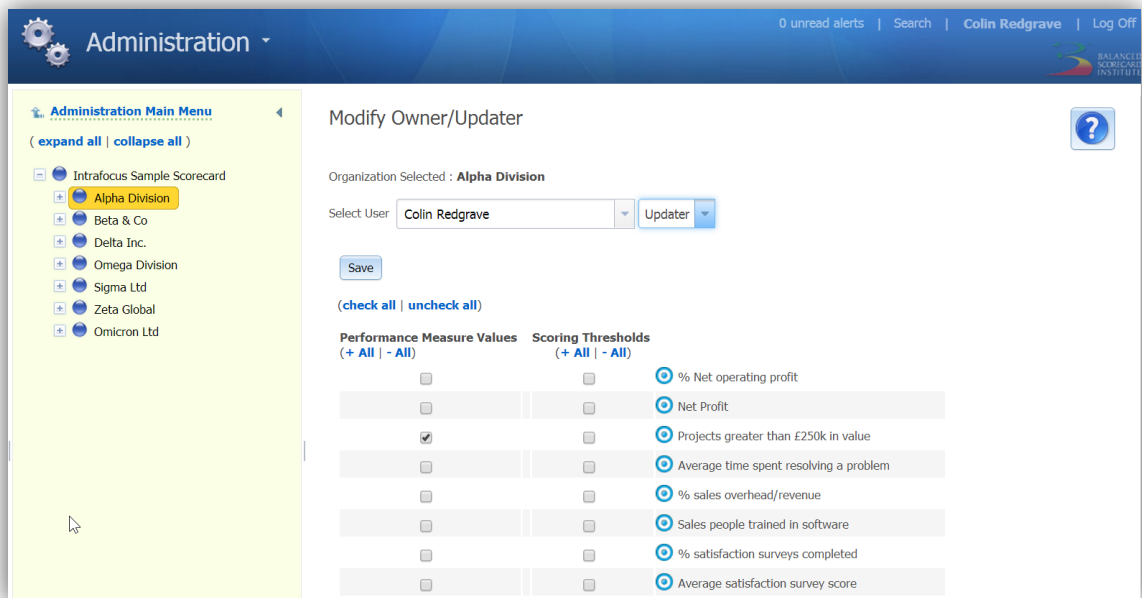

Click on any division and select Owner. From the drop-down menus select an individual user. You will be presented with a screen similar to this:

All of the Scorecard objects associated with the Organisational node you have selected will be presented with check-boxes to the left hand side. Select every object you would like the person you have chosen to 'Own'.

Next change the 'Owner' drop-down to Updater, you will see a screen like this:

This time all of the Performance Measures for the Organisation you have chosen have appeared. The left hand check box will assign the user you have selected as the 'Updater' for the Performance Measure. The right-hand check box will allow the user to update the 'threshold' values as well as the actual values for the Performance Measure.

Click on Administration Main Menu to get back to the main menu.

View Organisation Permissions

This subject is covered in the Quick Start guide: Administration – Permissions.

Embeddable Dashboards

This subject is covered in the Quick Start guide: Creating Dashboards

Application Administration

There are three features worth drawing out from Application Administration, for full descriptions of all topics please refer to the QuickScore or Scoreboard Administration Manual.

Appearance – The 'Main Image' refers to the image that is placed at the top of the Welcome Screen. This is usually a company logo.

Email Notification – This is a broadcast e-mail function not to be confused with the 'Alerts' module. A Power User can set up alerts to be broadcast to all users where specific conditions have or have not been met. For example all users that have not entered a Performance Measure update x days before the end of the current period can receive an email to that effect.

Data Format – lots of useful parameters, the one of note is 'Default Currency Unit'. There are more than 50 currency types available, the default and the other currencies used can be set here.

Advanced Features

There are several other advanced systems administration features available including; Log Files, Data Import, Tree Fixer and a SQL Console. All of these administration functions should be used with care and not until the QuickScore or Scoreboard Administration manual has been studied.