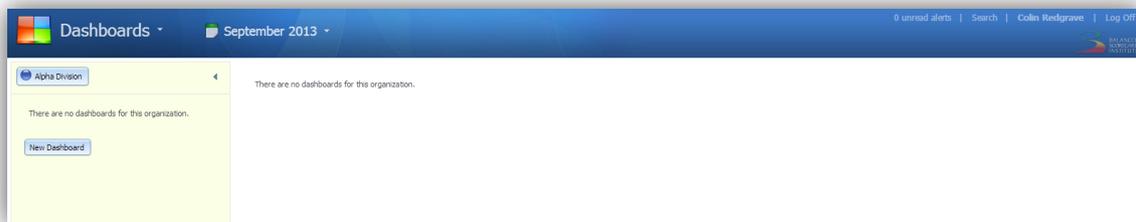


Creating Dashboards

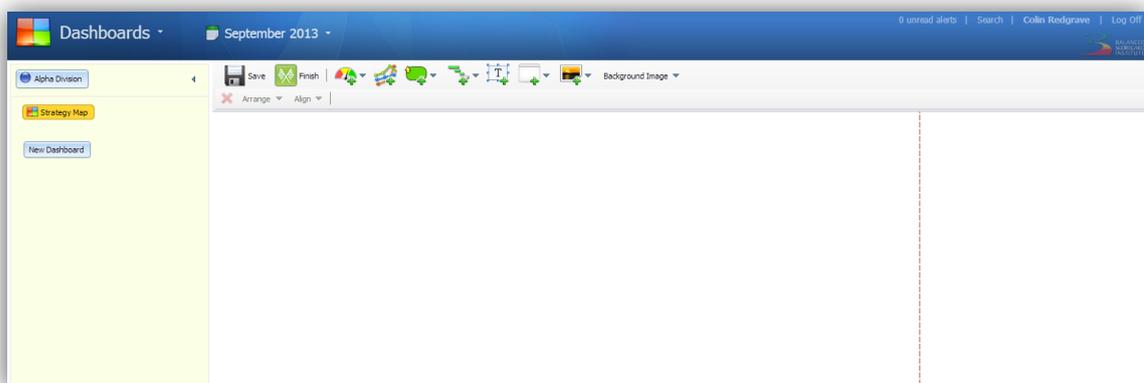
Once a Scorecard has been created the data can be displayed in many ways. Dashboards provide a quick and easy way to take important elements from multiple Scorecards or Perspectives and assemble them as a single view. Two popular ways of looking at data are Strategy Maps and Department Summaries.

Strategy Maps

To create a strategy map first go to the main menu drop-down and select Dashboards. Select the Organisation (blue dot) you are interested in and if there are no Dashboards already, you will see a screen like this: (If there are Dashboards, you will see the list)



Click on New Dashboard and give the new Dashboard a name, you will then be taken straight into 'edit' mode:

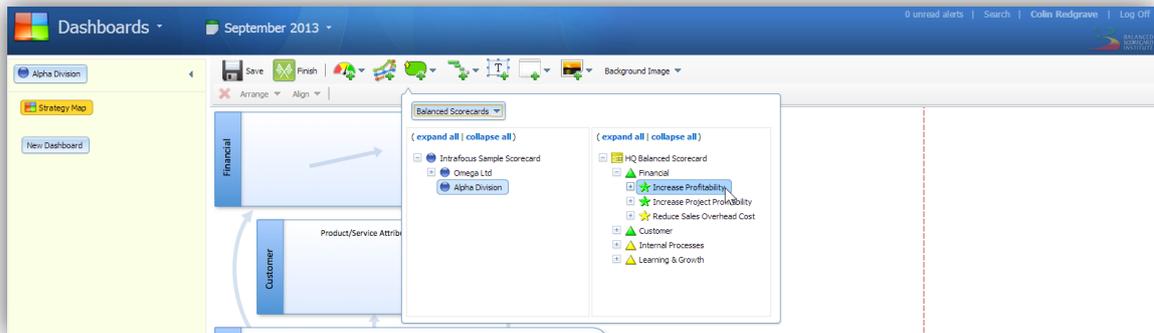


[Note: the red dashed border is the delimiter for slides that might subsequently be exported to PowerPoint. If you know your Dashboard is to be exported, keep it within these limits].

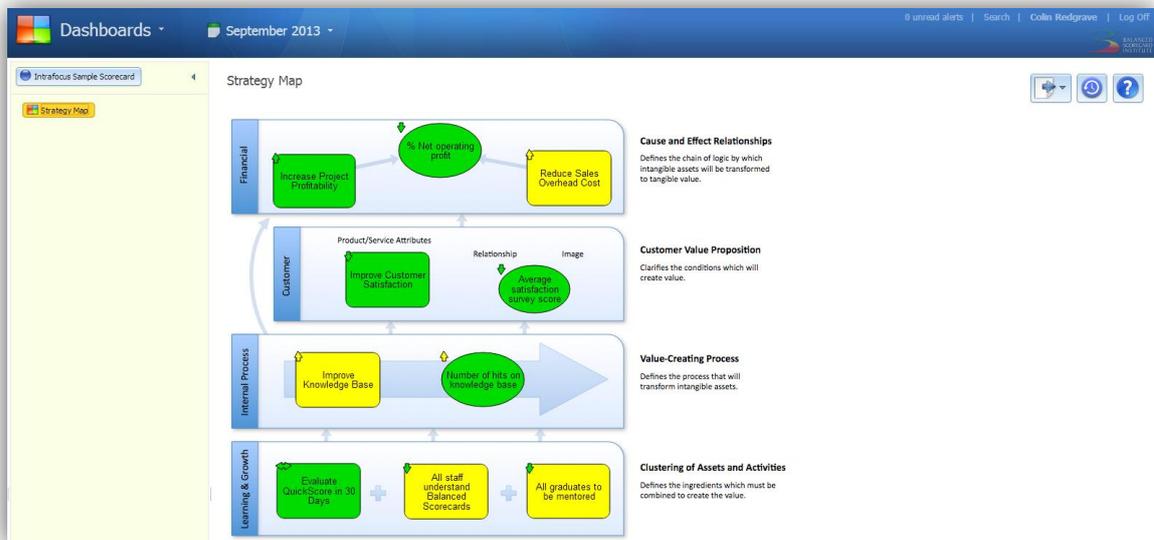
The Dashboard editor works in a similar way to PowerPoint. Any object can be selected, moved, resized and deleted. The objects are selected by using the tool bar at the top of the screen. For a Strategy Map, the first thing we need to do is select a background image. Click on Background Images and a list of all images currently in the system will be displayed.

[Note: images are imported into the system via Administration > Images, any image type can be imported]

For our example, we have selected a standard Balanced Scorecard Strategy Map background. The next stage is to add some Strategy Map ‘bubbles’. These bubbles tend to be Objectives that can be found on our previously created Scorecard. Click on the Strategy Map Bubble icon and a menu will appear asking you to select an object from an existing Scorecard:



Select an Object and it will appear on the Strategy Map. Move and resize it and then go through the process again, you will be aiming to create something like this:



Important Note: The great thing about Dashboards is that you build them once and then they are updated automatically whenever the data within the system is updated. Also, all of the embedded elements in the dashboard are clickable through to the source data.

Department Summaries

Creating other types of Dashboard is equally simple. There are a variety of objects you can select from the top line edit menu including:

- Gauges – which includes Speedometers, Horizontal and Vertical sliders
- Charts – nine different types, from Line charts to Polar charts to Combination charts
- Gantt Charts – taken from the Strategic Initiative section of the application
- Text Boxes – simple free from text
- Linked Content – or ‘Notes’ wherever a comment has been added, it can be selected

The process used to select objects, move, resize or delete them is the same as described above.

Below are a couple of examples of typical Departmental Dashboards:

