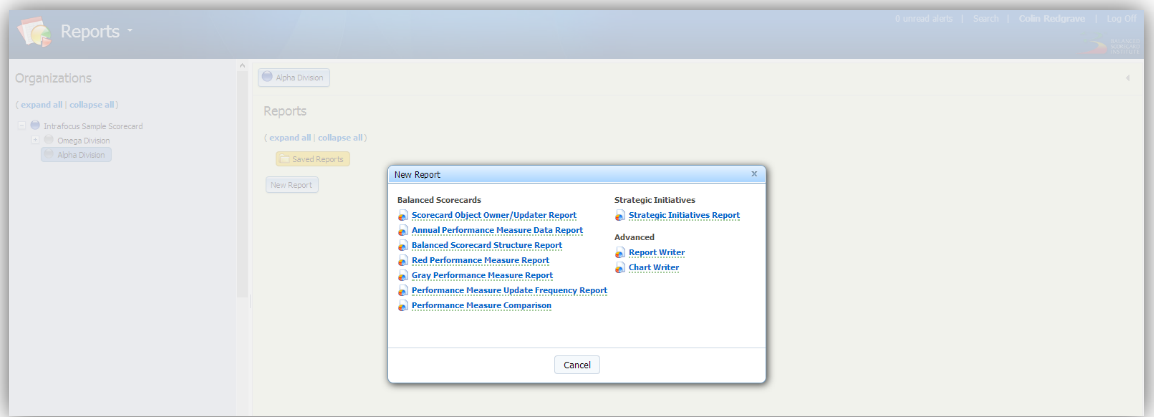
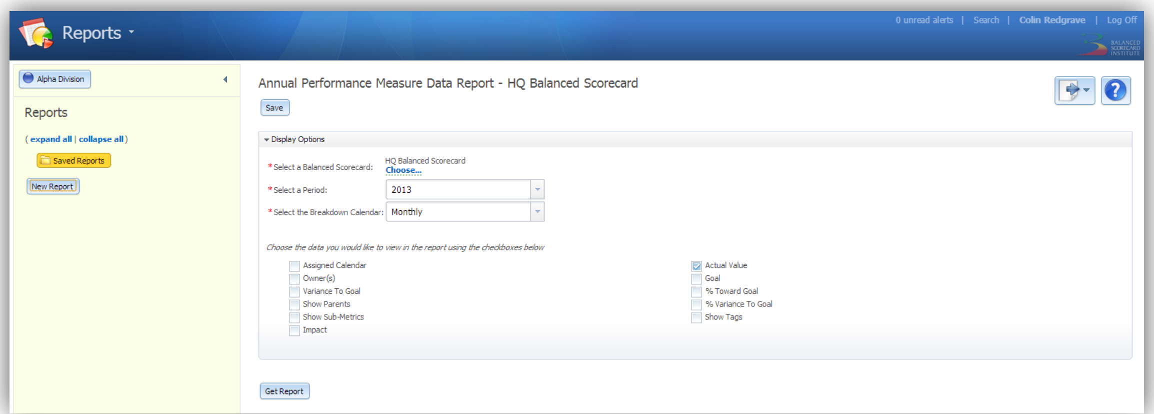
Creating Reports

If you require a more traditional type of report i.e. a typical spreadsheet style or chart, then go to the Reports module. This can be found in the main menu drop-down, just select reports. In the left hand pale blue panel select the Organisational node (blue dot) you are interested in and then click on the New Report button. You will be taken into a report builder dialogue that looks like this:



There are several standard reports to choose from and the opportunity to create a custom report or chart via 'Advanced' functions. Let's start with a standard report. Click on 'Annual Performance Measure Data Report', a screen like this will appear:



The application has automatically added the top Level Scorecard for the Organisation you have chosen. It has selected the current year, and selected Monthly as a period breakdown. At this point we could simply click the 'Get Report' button and a report would appear. However, it is worth noting the impact of selecting the items in the check-boxes:

Assigned Calendar: Calendar that was selected when creating the Performance Measure (How often are the Performance Measures to be updated).

Owner(s): Displays the Owners of the Performance Measures.

Variance To Goal: The distance away from the Goal.

Show Parents: Displays all of the scorecard objects for the Performance Measures such as Scorecard Name, Key Performance Areas, Objectives, etc.

Show Sub-Metrics: Displays sub-metrics that reside under a metric.

Impact: How much a scorecard object impacts the overall scorecard score. This is dependent on the weighting of each scorecard object.

Actual Value: Displays the actual value for the period selected.

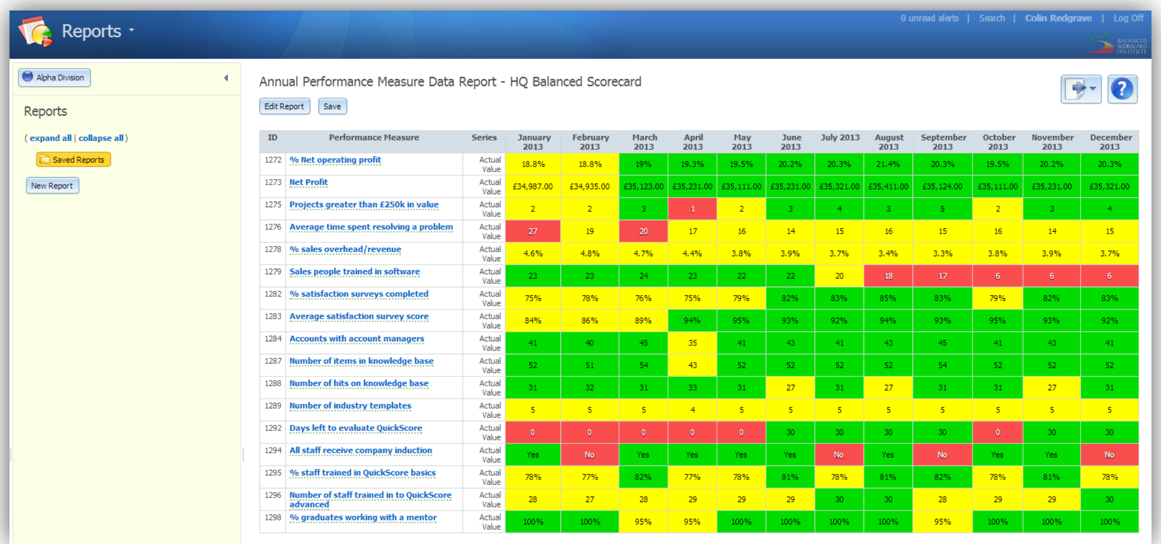
Goal: Displays the Goal threshold for the Performance Measure.

% of Goal: Displays the percentage the value is to the Goal.

% Variance To Goal: Displays the percentage distance away from the Goal.

Show Tags: Displays Tags that are created for the Performance Measure.

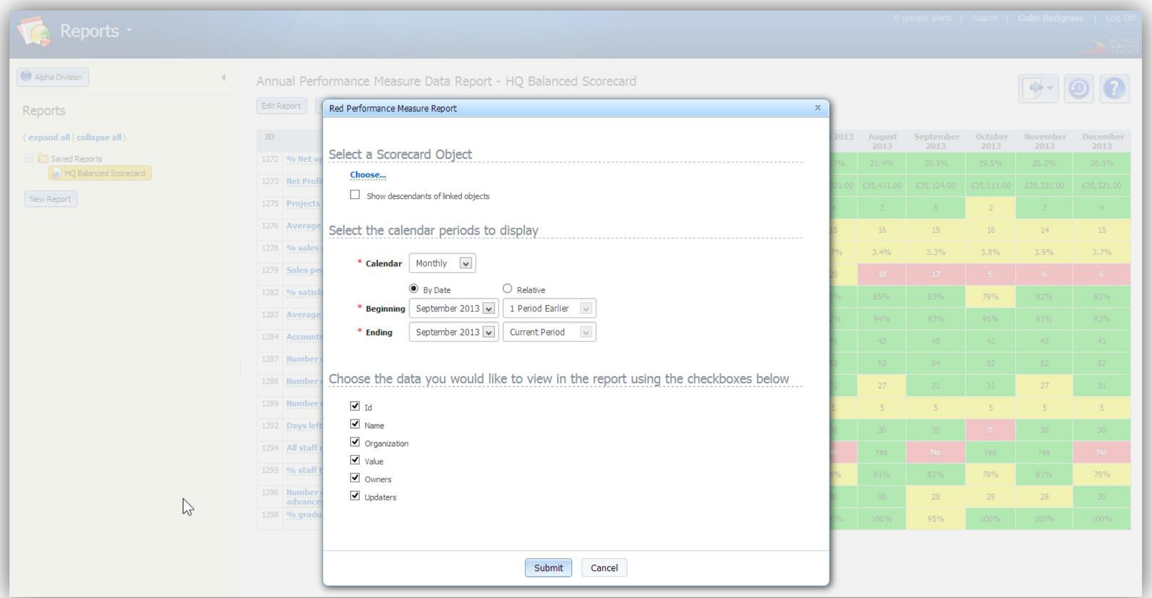
Click on any of the boxes to include the additional data (be aware that this will result in the addition of an extra line or column). The final report should look something like this:



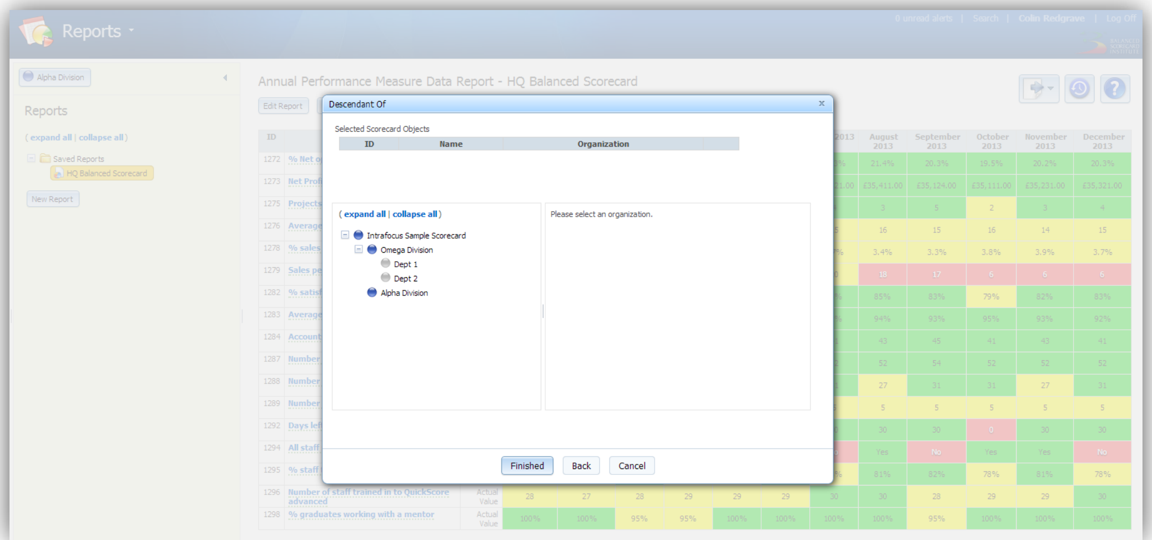
ID	Performance Measure	Series	January 2013	February 2013	March 2013	April 2013	May 2013	June 2013	July 2013	August 2013	September 2013	October 2013	November 2013	December 2013
1272	% Net operating profit	Actual Value	18.8%	18.8%	19%	19.3%	19.5%	20.2%	20.3%	21.4%	20.3%	19.5%	20.2%	20.3%
1273	Net Profit	Actual Value	£34,987.00	£34,935.00	£35,123.00	£35,231.00	£35,111.00	£35,231.00	£35,321.00	£35,411.00	£35,124.00	£35,111.00	£35,231.00	£35,321.00
1275	Projects greater than £250k in value	Actual Value	2	2	3	1	2	3	4	3	5	2	3	4
1276	Average time spent resolving a problem	Actual Value	27	19	20	17	16	14	15	16	15	16	14	15
1278	% sales overhead/revenue	Actual Value	4.6%	4.8%	4.7%	4.4%	3.8%	3.9%	3.7%	3.4%	3.3%	3.8%	3.9%	3.7%
1279	Sales people trained in software	Actual Value	23	23	24	23	22	22	20	18	17	6	6	6
1282	% satisfaction surveys completed	Actual Value	75%	78%	76%	75%	79%	82%	83%	85%	83%	79%	82%	83%
1283	Average satisfaction survey score	Actual Value	84%	86%	89%	94%	95%	93%	92%	94%	93%	95%	93%	92%
1284	Accounts with account managers	Actual Value	41	40	45	35	41	43	41	43	45	41	43	41
1287	Number of items in knowledge base	Actual Value	52	51	54	43	52	52	52	52	54	52	52	52
1288	Number of hits on knowledge base	Actual Value	31	32	31	33	31	27	31	27	31	31	27	31
1289	Number of industry templates	Actual Value	5	5	5	4	5	5	5	5	5	5	5	5
1292	Days left to evaluate QuickScore	Actual Value	0	0	0	0	0	30	30	30	30	0	30	30
1294	All staff receive company induction	Actual Value	Yes	No	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	No
1295	% staff trained in QuickScore basics	Actual Value	78%	77%	82%	77%	78%	81%	78%	81%	82%	78%	81%	78%
1296	Number of staff trained in to QuickScore advanced	Actual Value	28	27	28	29	29	29	30	30	28	29	29	30
1298	% graduates working with a mentor	Actual Value	100%	100%	95%	95%	100%	100%	100%	100%	95%	100%	100%	100%

You now have the option to go back and edit the report or save it. Click on Save and you will be asked to provide the report with a name. The application will provide a default name; you can delete this and give the report a name of your own choosing. The report will then appear in the list on the left of the screen.

Next, let's try a different sort of report. Click on New Report again. You will be presented with the same report builder dialogue, this time select 'Red Performance Measure Report'. A slightly different dialogue will appear as shown below:

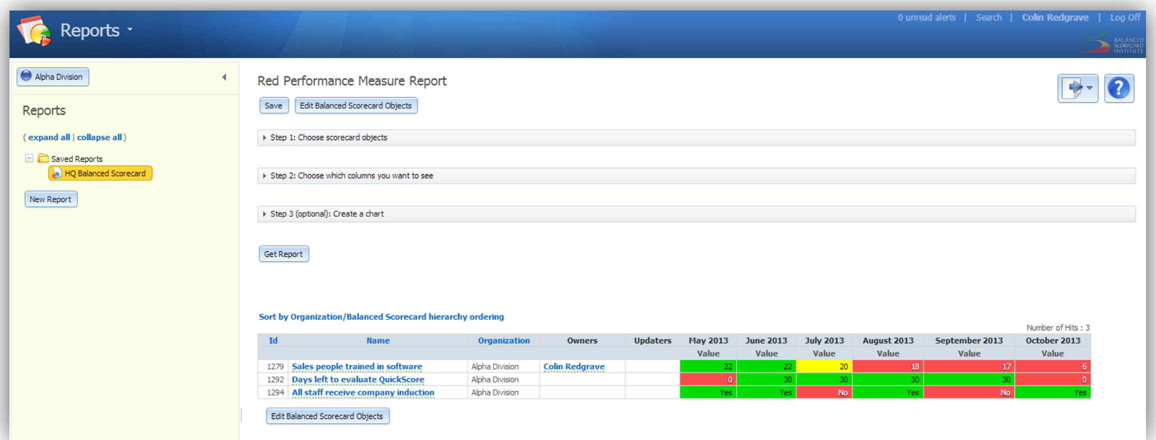


This time there is a requirement to select a Scorecard Object, click on the word 'Choose' and you will be presented with a view of your Organisation tree, it will look something like this:



Select the Organisation you are interested in then select the Scorecard Object (we suggest you select a top-level Scorecard for this exercise). Click on Finished and you will be returned to the Red Performance Measure Report dialogue as shown further above.

This time select a different calendar display. Click on ‘Relative’ in the ‘Select the calendar periods to display’ section, click on the top drop-down and select ‘5 Months’. Click on Submit and you will be presented with a screen like this:



You now have the option to 1. Choose a new scorecard object, 2. Choose which columns you would like to see, 3. Create a chart or finally to save the report you can see. Click Save to save the report (you can always come back at a later date to change it) and give it a name. It too will be saved in the list.

To recall a report, just click on the Report name in the list on the left hand side. To edit the report, click on the Edit button at the top of the report page.

There are many other functions within Reports to create the reports you need. We suggest that you experiment with the standard reports first and then move on to use the advanced report writer.