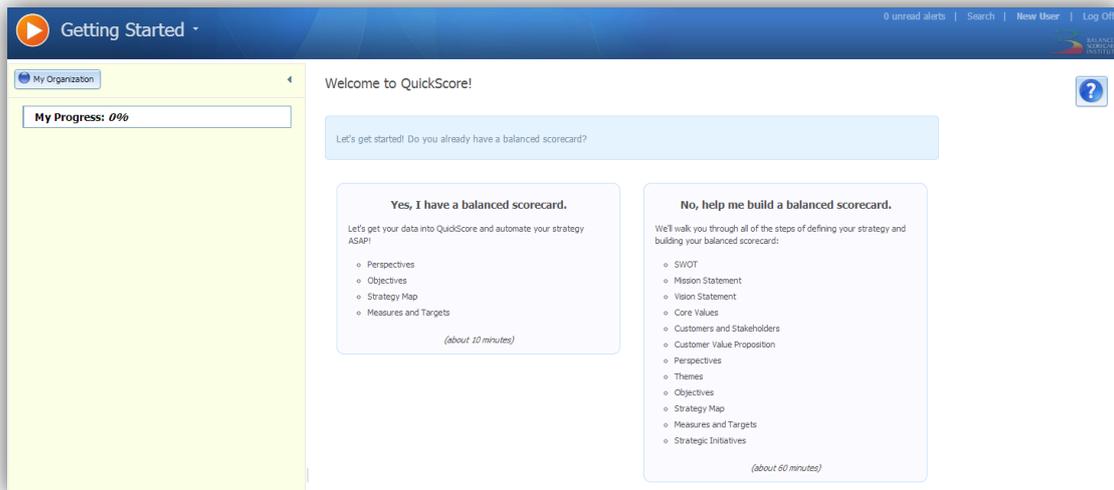


Getting Started

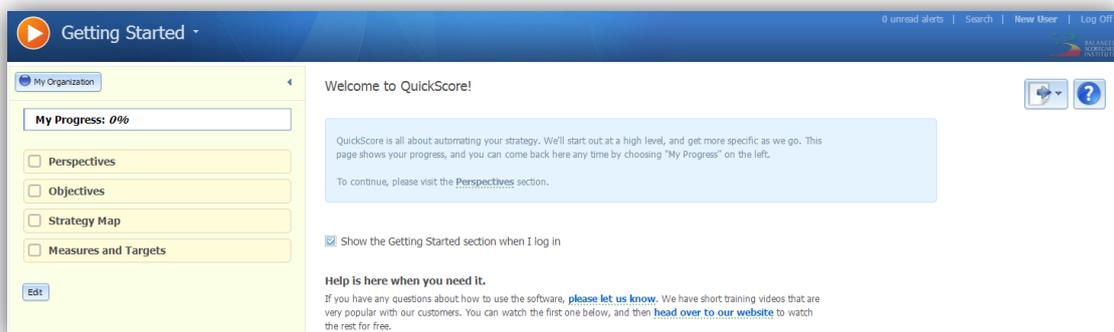
Once you have logged into the application you will be presented with the **Getting Started** screen. This entry point can be changed later once you are familiar with the system, but for now it will enable you to quickly create a balanced scorecard.



On this screen are two options, the first to build a scorecard from some existing data the second to build a scorecard from scratch. Depending on how much time you have, select either option.

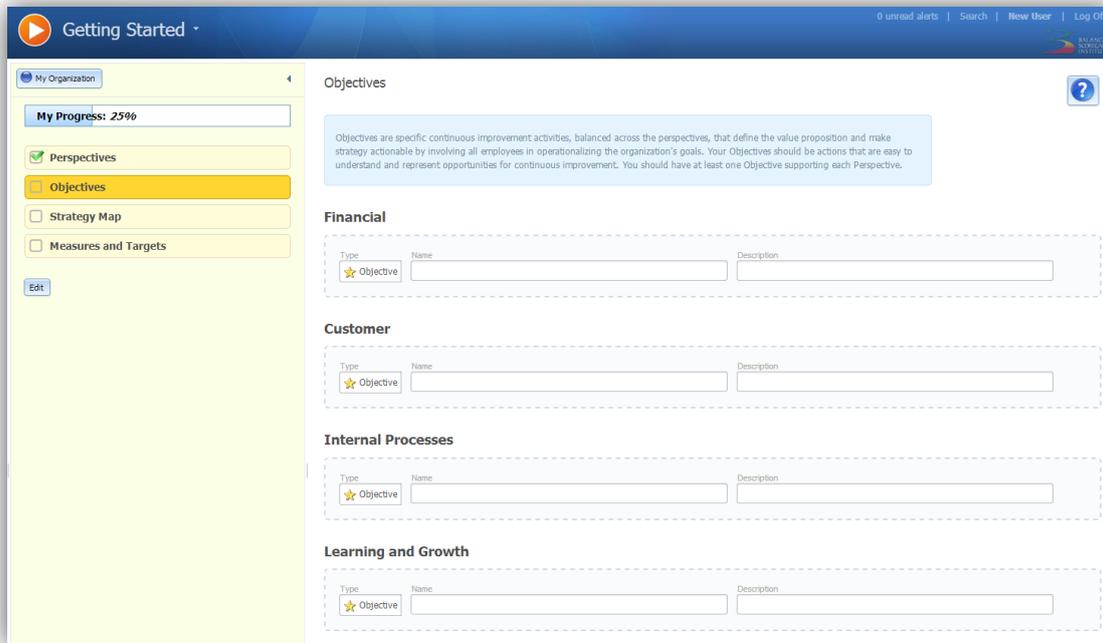
Important Note: you can come back to Getting Started at any time to complete the process.

For the purpose of this Quick Start tutorial we suggest you take the first option **Yes, I have a Balanced Scorecard**. You will then be presented with the following screen:



The four major elements of the Balanced Scorecard have been added to the left hand pane; Perspectives, Objectives, Strategy Map and Measures and Targets. Click on Perspectives to define the top-level areas of your scorecard.

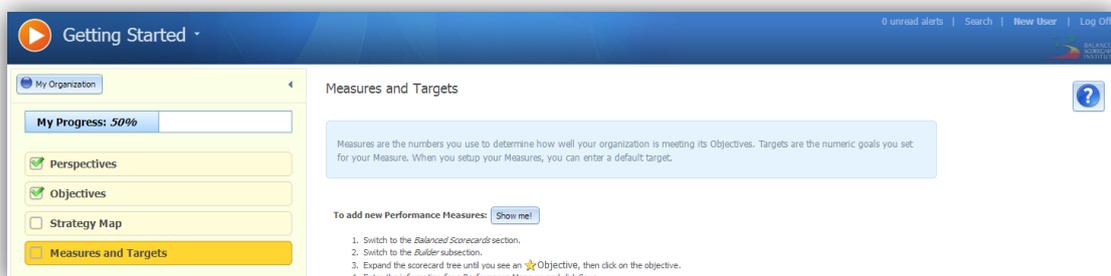
QuickScore has pre-built the four perspectives (and given you an option to add further perspectives). You do not need to use these names, just delete and add your own names if applicable. These Perspectives will be the major categories for you first scorecard. Next click on Objectives:



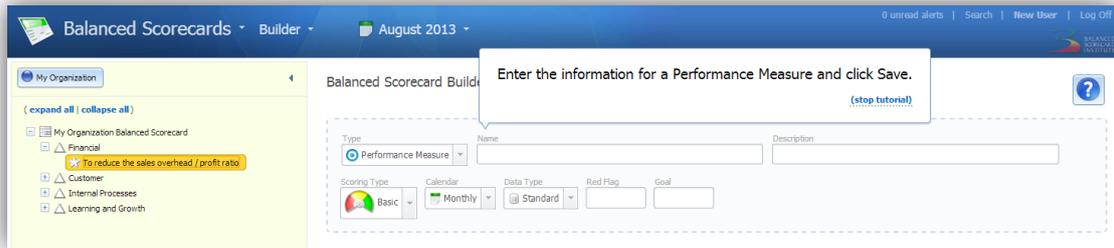
Next, click on Objectives in the left hand pane. QuickScore has added an Objective to each Perspective. Fill in the details in each box. Once you have saved an Objective, you will be given the option to add another under the same Perspective. You can add as many objectives as you wish.

Important Note: It is best practice to have three or less Objectives per Perspective.

We are going to skip Strategy Maps, they are dealt with in another Quick Start guide (Quick Start – Strategy Maps) so for now click on Measures and targets:



The tutorial will ask you to switch to a new section in the application called Balanced Scorecards. Hit the **Show Me!** button and you will be guided to the correct place as shown below:



Once you have entered the name and the description of the Performance Measure, you will need to provide the following information:

- Scoring Type – QuickScore has a range of measures, the most common is red/amber/green. Experiment with the other types.
- Calendar – the frequency data is collected for the Performance Measure, this is usually monthly but can be based on any default or customer defined calendar.
- Data Type – QuickScore has three data types, standard numeric, percentages and currency (currency type can be defined in Administration)
- Red Flag and Goal – These are the targets associated with the performance measure. **This is an important bit:** You need to determine what is considered ‘good’ for this metric and what is considered ‘bad’. For the metric type ‘Goal/Red Flag’ there are two targets, for other metric types there are more or less.

This process should be repeated for each performance measure. For more detailed information on Performance Measures (often referred to as Metrics or KPIs) take a look at the Quick Start Guides **Creating Metrics** or **The Builder**.