

# My Bookmarks and Welcome

## My Bookmarks

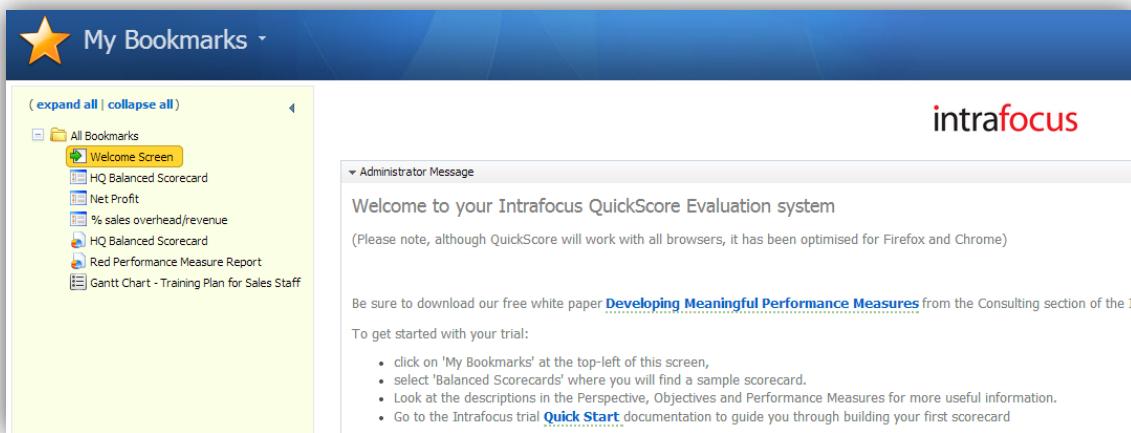
When you log in to the application, you have the option to start at 'Getting Started' or 'My Bookmarks'. You can reach both of these modules from the main menu drop-down which can be found at the top left of the screen. The default is the 'Getting Started' screen, but at some point you will check the box in Getting Started to say you want to start with the My Bookmarks Screen. The My Bookmarks screen looks like this:

The first thing you will notice is that apart from 'Welcome Screen' this view is devoid of bookmarks!

The reason we have left this guide to later on in set of Quick Start guides is because without any content in the application there is nothing to bookmark. To bookmark any page in the application you simply go to the page and hit the 'Send To' button (towards the top right of the page) and select My Bookmarks. The page will then automatically appear in the list above. For example, bookmarking a Strategy Map would look like this:

Notice the cursor is on My Bookmarks in the drop-down list under the Send To button. You will be notified that the action was successful by a message appearing in the top right of the screen.

Go to several other pages and add some more bookmarks. You can bookmark any screen in the application. The result might be a list like this:



You can then click on the Bookmark for quick and easy access to that object.

## The Welcome Screen

The Welcome Screen is a special bookmark. This is the normal entry screen once a system has been established. There are some important features associated to the Welcome Screen, they are:

**Administrator Message** – This is a broadcast message that is set up by the Application Administrator. It can be changed frequently or set to be a static welcome message.

**My Actions** – If you have been nominated as the owner of an Initiative or a Task and there is a due date associated with that task, a summary of the details will appear here. You can click on the summary and be taken to the details.

**Performance Measures I Own** – If you have been nominated as the ‘Owner’ of a Performance Measure, that measure will appear in a list here. You can click on the measure to be taken directly to it. So you don’t need to Bookmark your own Performance Measures.

**Performance Measure I Update** – There are two options here, the first to manually update the Performance Measures you have been nominated to update (see below) and the second to import an update.

**Important Note:** The import Performance Measures option is an advanced function; please do not try this unless you have been set up by a system administrator to do so.

## Manually updating Performance Measure from the Welcome Screen

If you have been defined as the ‘Updater’ for a number of Performance measures, you can go directly to each performance measure in turn by selecting ‘Balanced Scorecard’ from the main menu and navigating to the measure. OR – You can click on ‘Update My Performance Measures’ from the Welcome Screen and the application will collect all of your Performance Measures in a single place and allow you to update them in one go.

This is a very powerful function especially if you are the updater for several measures that are distributed across a large scorecard base. A typical multiple update screen looks like this:

The screenshot shows a web-based application interface for managing performance measures. At the top, there's a navigation bar with 'My Bookmarks', a date dropdown set to 'September 2013', and user information ('0 unread alerts | Search | Colin Redgrave | Log Off'). Below the navigation is a sidebar with 'All Bookmarks' and a link to 'Welcome Screen'. The main content area is titled 'Update Performance Measures' and includes a 'Return to Welcome Screen' link. It features a table with three rows of performance measures, each with a red, green, or yellow background color. The columns include 'Performance Measure ID', 'Name', 'Period', 'Actual Value', 'Scoring Thresholds' (with 'Red Flag' and 'Goal' fields), 'Calendar', and 'Notes' (indicated by a small red or green dot). A note at the bottom states: 'Note that scores are updated after actual values, so recently entered actual values may not yet be reflected elsewhere in the application.' A 'Update Performance Measures' button is at the bottom.

Performance Measure ID	Name	Period	Actual Value	Scoring Thresholds	Calendar	Notes
1250	Projects greater than £25,000	September 2013	2	Red Flag: 3, Goal: 5	Monthly	● (red)
1263	Number of Consultants on-site	September 2013	2	Red Flag: 5, Goal: 3	Monthly	● (green)
1265	Satisfaction Survey Score	September 2013	90%	Red Flag: 80%, Goal: 95%	Monthly	● (yellow)

The final item in the Welcome Screen will only appear if you have been given permissions to update your password, it is the My settings option.