

Organisations and Scorecards

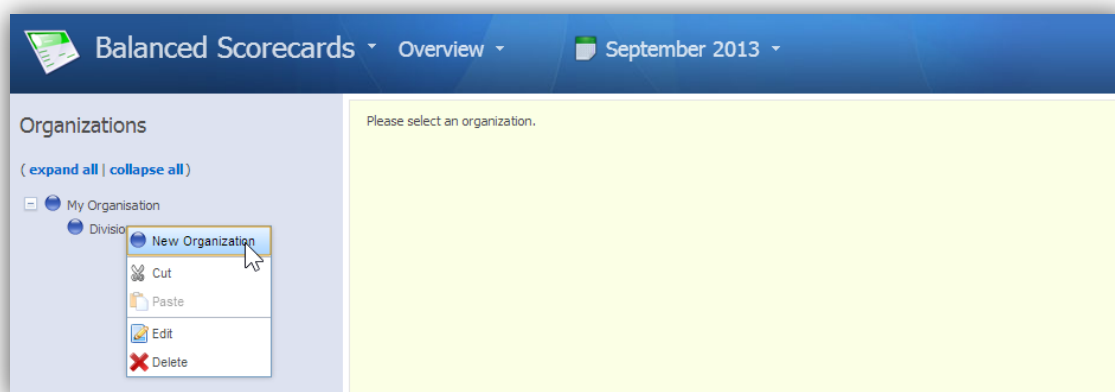
The foundation for all other build activities in QuickScore is the Organisation and Scorecard structure, everything else is built on this.

The Organisation structure provides the means to organise your scorecards, objectives and metrics in a way that is most useful to your organisation. Traditionally this is done by setting up a HQ and divisions or departments. However, you are not restricted in this way; any hierarchical business formation can be created.

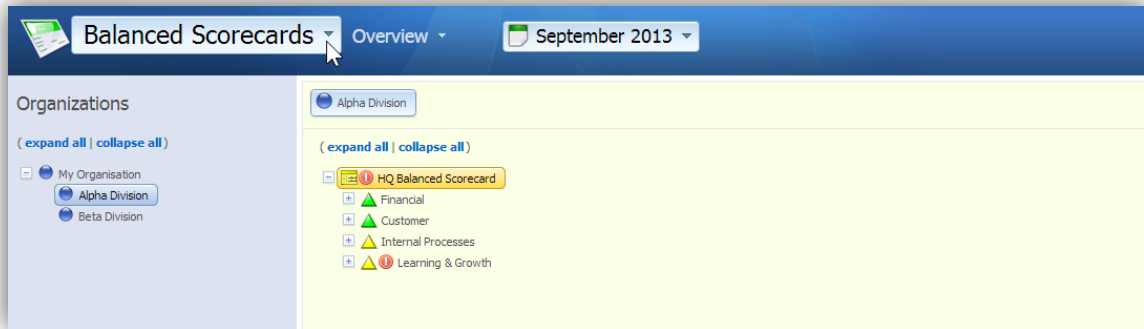
Organisations

Important Note: a degree of thought has to be put into how the organisational structure is created. Future 'permissions' to view are based on organisational nodes (the blue and grey dots).

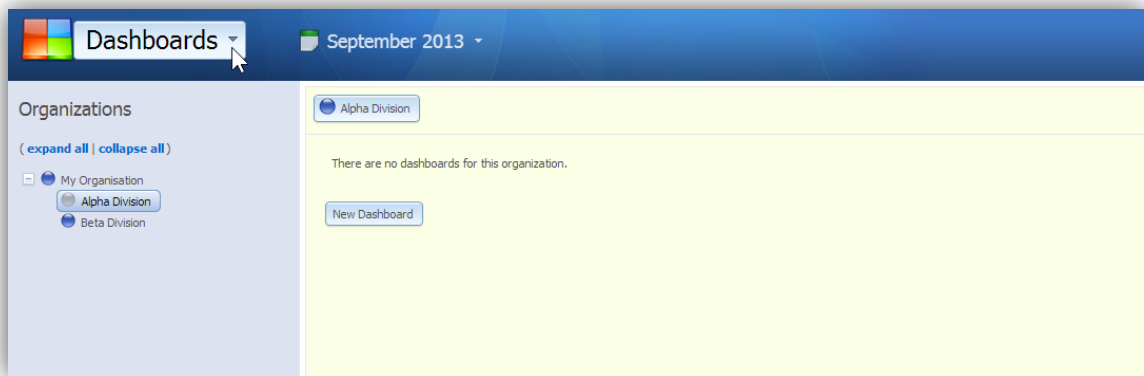
Adding an Organisation: Go to the main menu drop-down and select Balanced Scorecard, you will see a blue or grey dot with a name beside it. This represents a grouping, organisation, division or department. Right click on the blue or grey dot and select **New Organisation**, follow the dialogue to name the new organisation:



Blue and Grey Dots: What is the significance of the Blue and Grey colouring? The blue dots indicate that there is content available for that organisational node in that particular view. A grey dot indicates that there is no content available for that organisational node in that particular view.

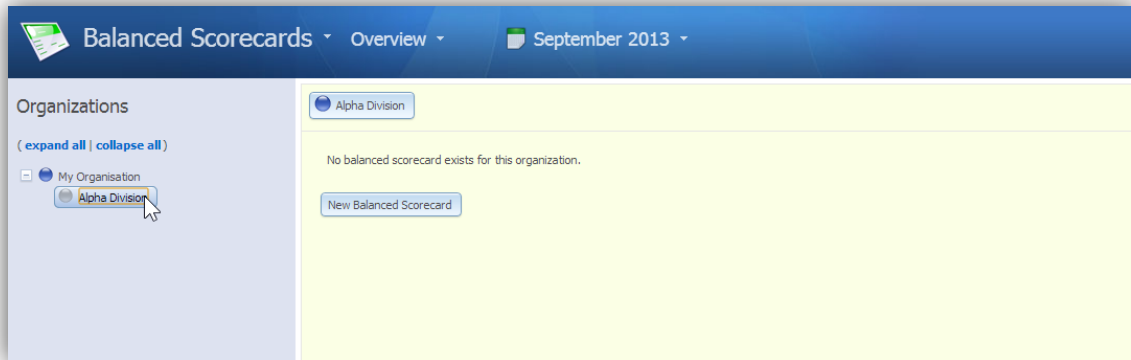


For example, it may be that for the Organisation called 'Alpha Department' there is a Balanced Scorecard so in the Balanced Scorecard view the dot would be blue. It may be for the same department there are no Dashboards so in the Dashboard view the dot would be grey, and so on.

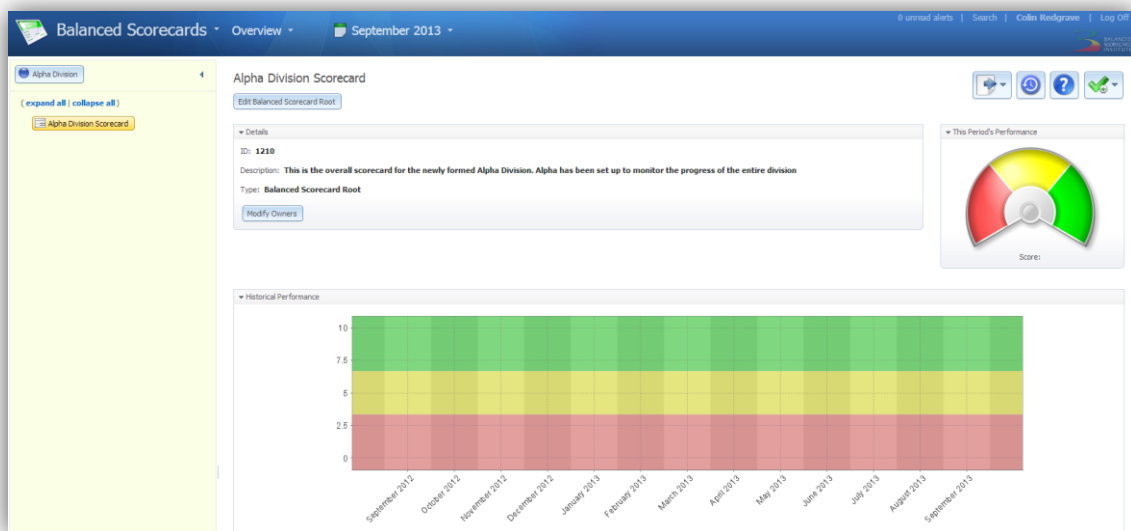


Adding a New Scorecard

There is a 1:1 relationship between Organisational nodes and Scorecards. Once you have created an Organisational node the next thing to do is to create, name and describe a scorecard. Make sure you are in the main module Balanced Scorecards and the sub-menu Overview. Click on the Organisation (which should have a grey dot at this time) and you will see a screen like the one below appear:



Click on New Balanced Scorecard, follow the dialogue to give the scorecard a name and a description and click Save. The overview structure will appear looking similar to this:



This scorecard contains the basic structure and used by most elements within the application. As yet there is no data associated with the scorecard and so there is no needle on the gauge or historical trend information on the graph. The next stage is to add Objective groupings (Perspectives), Objectives and Performance Measures (Metrics) to this scorecard.

To do this we move to the Builder sub-menu view. Go to the next Quick Start tutorial called **The Builder**.