# The Builder

The last Quick Start Guide looked at creating an Organisation and Scorecard. These two steps need to be completed before going on to create Objectives, Metrics or Themes. Once an Organisation and a Scorecard has been created, go into the Overview sub-menu and a screen like this will appear. (In this example an organisation called Alpha Division and a scorecard called Alpha Division Scorecard has been created):
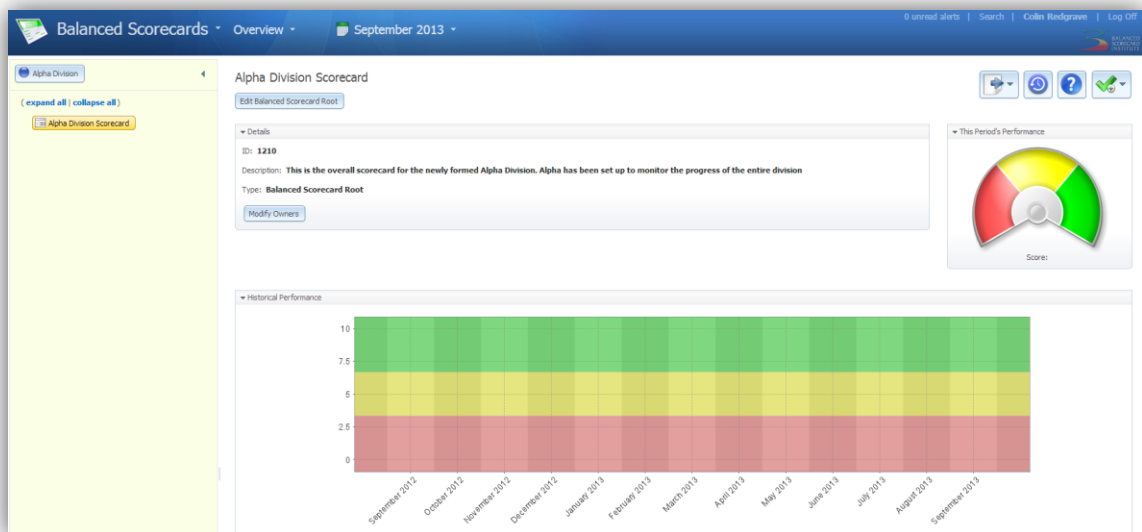
This view is the standard layout for all objects in the system. There is a detailed description, a gauge showing this month's status and a graph providing history over time. Further down the screen are panels to update metrics, add related items, add notes and create alerts. These are all dealt with later in other Quick Start guides.

To enter into Builder mode, click on the Sub-Menu (currently Overview) and select Builder, the following view will be presented:


The Builder has defaulted to the 'Type' Perspective because a Scorecard has been clicked on in the pale yellow panel on the left hand side. Generally the Builder will default to the Type below the

item clicked on in the order Perspective > Objective > Performance Measure. The type can be changed by clicking on the Type drop-down.

Note on Perspectives: A Perspective is a term used when creating a Balanced Scorecard. It is a collection of Objectives and Metrics related to a single theme. A classic Balanced Scorecard will consist of four Perspectives: Financial, Customer, Internal Processes and Learning & Growth. In the Public sector, this changes to Stakeholder, Customer, Internal Processes and Learning and Growth. There are no hard-and-fast rules about Perspectives, the key is to ensure there is a 'Balance' between Financial and Non-Financial objectives and measures

For the purpose of this example the Type has been left as Perspective. Next add the Name and Description. Hit Save and a new entry box will appear for another perspective. If all of the Perspective names are known, enter their names and descriptions. Finally, click on one of the Perspective labels in the left hand yellow pane, a screen like this will appear:
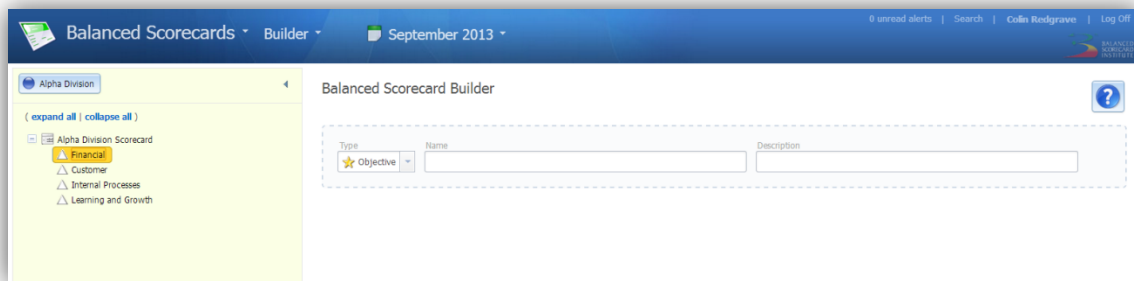

This time Objective has appeared in the Type drop-down menu. Go through the same process as before to add Objective names and descriptions.

Important Note: It is good practice to have only three or less Objectives per perspective. The general view is that in the maelstrom of day to day work if more than three objectives per year are added then none will be successfully completed.

The completed Objectives Builder screen will look something like this:
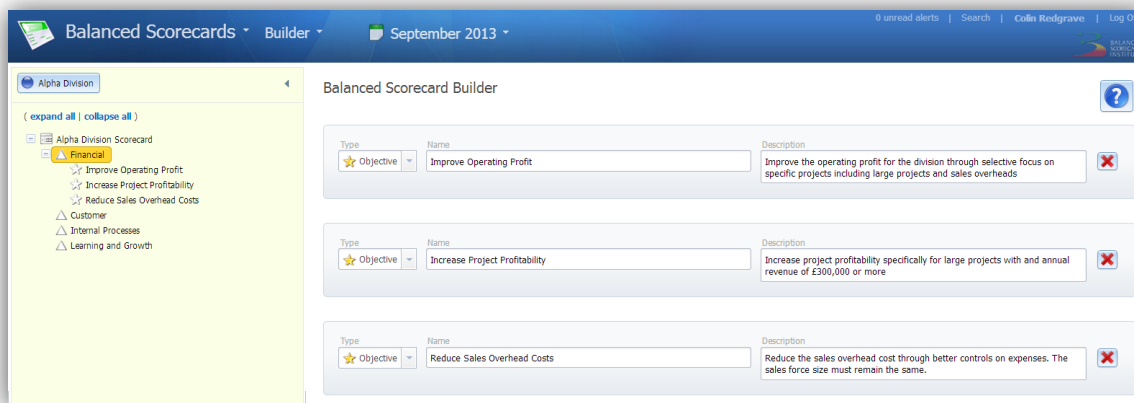
Finally, click on one of the Objectives in the left hand pale yellow pane, this time a slightly different entry screen will appear:
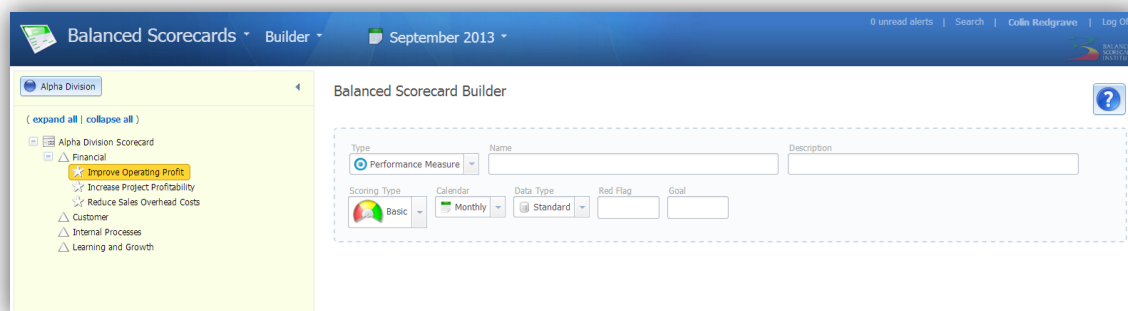
Together with the Name and Description, for a Performance Measure (called a KPI in Scoreboard) there are several other pieces of information required as follows:

Scoring Type – QuickScore has a range of measures, the most common is red/amber/green. 95% of the time red/amber/green will be used; occasionally another scoring type can be used.

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 (the default currency type can be defined in Administration)

Red Flag and Goal – These are the targets associated with the performance measure. What is considered 'good' for this metric and what is considered 'bad' needs to be defined. For the metric type 'Goal/Red Flag' there are two targets, for other metric types there are more or less. For example for a Goal/Red Flag, the red/amber/green could look like this:

- Red   0 - 10
- Amber   11 - 20
- Green   21 – 30

In which case the values entered into the system would be **Red Flag = 10** and **Goal = 21**.

When all of these details have been entered, hit save.

The saved information will be re-displayed in a slightly different format together with an option to add a further Performance Measure. Two additional data entry boxes will appear. QuickScore will attempt to provide the correct data in the additional boxes based on what has been previously entered, but this should be checked. The additional data is as follows:

Aggregation Type – This refers to what should happen to the data when it is viewed in a calendar of a longer duration than the frequency collection calendar. For example, if the Performance Measure 'Net Operating Profit' is collected Monthly, what should happen to it when viewed Quarterly or Annually? In this case it would be Summed (∑). If However the Performance Measure

was '% Net Operating Profit' and it too was collected Monthly, then when viewed Quarterly or annually we would expect to see either and Average % or we might want to see the Last Value entered.

Decimal Precision – How many decimal points should be shown on this metric. A default value will have been set in Administration, this option allows the default to be over-ridden.

After adding some Performance Measures the screen will look like this:
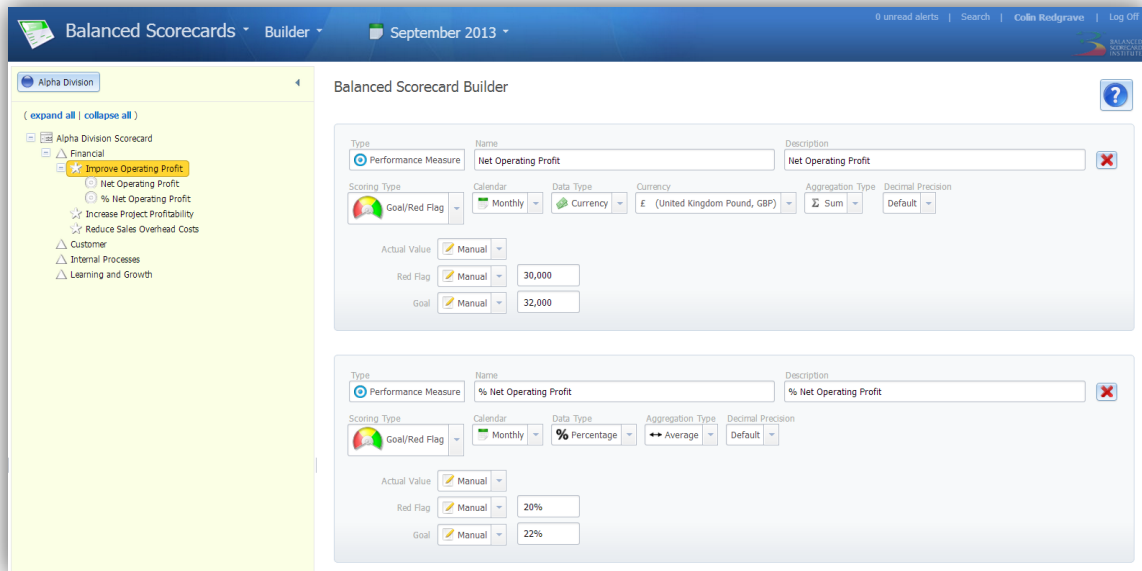
Switch back into the sub-menu Overview to see the frameworks that have been created ready for data input. At any time the Builder sub-menu option can be selected to edit any objects or to add additional objects.

The Scorecard has now been created. Using the Builder provides a quick start option to create a complete scorecard. Once created it may need fine tuning. This can be done using the Builder sub-menu. For a more detailed approach and to use some of the more complex functionality, especially for Performance Measures/KPIs the basic edit mode should be used. Details of this option can be found in the Creating Metrics Quick Start Guide.