# Updating Metrics - Manually

At this stage you should have created an Organisation, added a Scorecard and added some Perspective, Objectives and Performance Measures to the Scorecard. If you have not, go back to the Quick Start guides on these subjects and do so. Go to the main menu drop-down and select Balanced Scorecards and make sure the sub-menu is Overview. Click on any Organisation node (blue dot) and select the Scorecard in the pale yellow pane. You should see something like this:
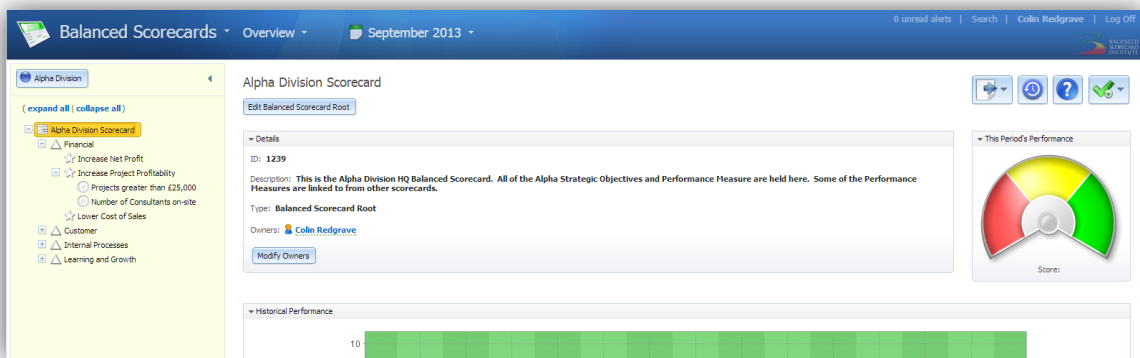

You will notice that the tree structure on the left has no colour. This is because there is no 'data' in the system as yet. None of the Performance Measures have been updated. Performance Measures can be updated in three ways:

1. Manually while in the Overview section of the Performance Measure itself

2. Manually from the Welcome Screen (if you are the assigned Updater of the Measure)

3. Automatically by using the 'Connect' module (see Updating Metrics Automatically)

1. Updating while looking at the Performance Measure overview

To update a Performance Measure in the overview section, first click on the measure in the left hand pale yellow pane and then scroll down the right hand window to the 'Actual and Threshold Values' section. You may have to click on the grey bar to open the section, it will look like this:
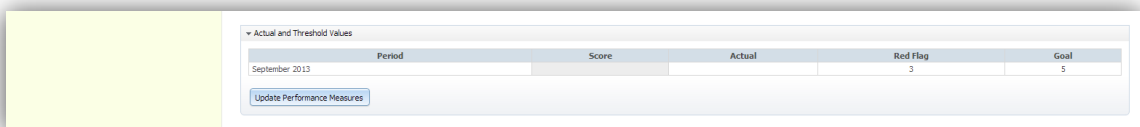
Click on the Update Performance Measure button and the screen will change providing input boxes for both the Actual Value and the Threshold values. [Note: if you are an Administrator you will be

able to update Actual and Threshold values, if you are an Updater you may have been restricted to update Actual values only, this is quite normal and dependent on your internal policies]. Add an Actual Value to the Performance Measure and you will see that both the Gauge and the Graph will be updated [Note: depending on the speed of your Internet connection, you may have to hit the browser recycle button for a full update]. In the following example a score has been added to illustrate how a Red metric will look:
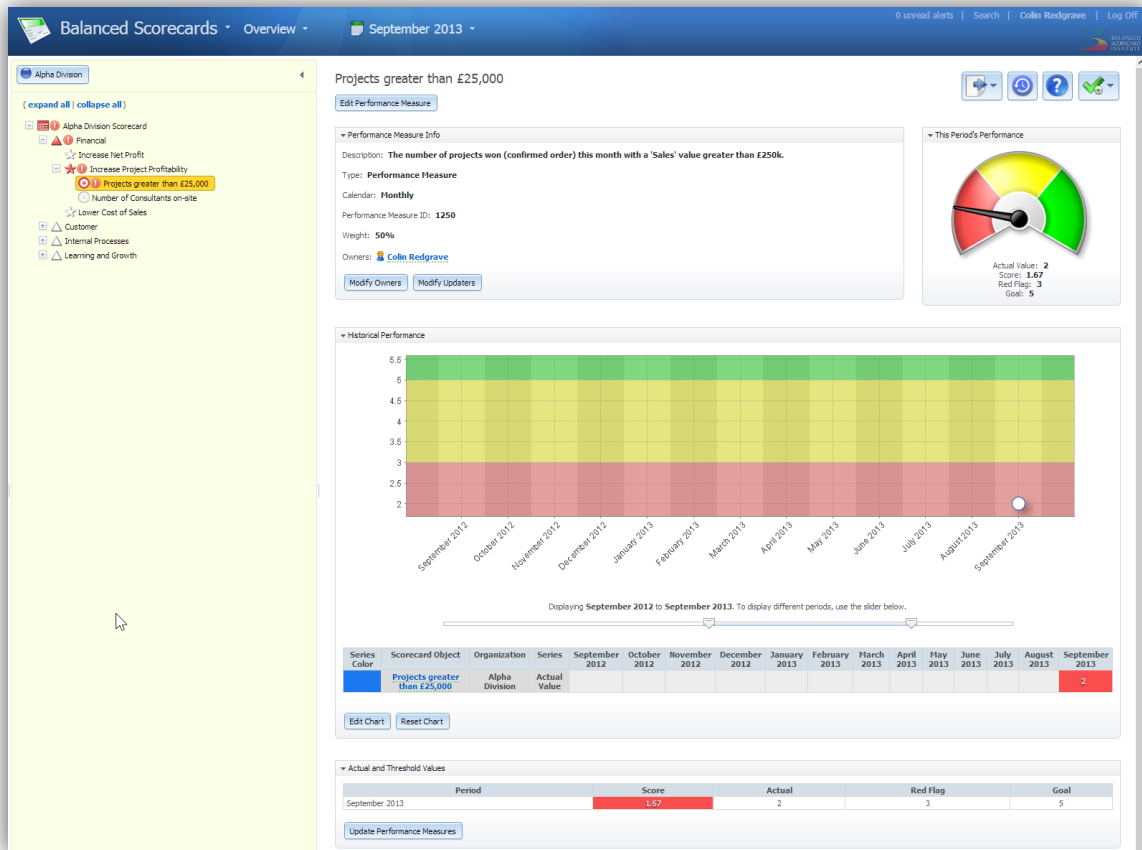
Several things have happened on the refreshed screen:

- The Actual Value that has been input has generated a 'Score' placing the Performance measure in the Red zone
- The graph has been updated with the Actual Value
- The Gauge has been updated with the Actual Value
- The icon for the Performance Measure in the left hand pane has been updated to Red
- The icons in the tree above the Performance Measure have been updated to reflect the 'rolled-up' score all the way up to the Scorecard

The above process can be repeated for every Performance Measure in the system. Before looking at how to update a Performance Measure from the Welcome Screen, you may find the following tip very useful:

**Updating multiple months at one time:**

There may be occasions when you need to create a Performance Measure and populate it with historical data. This can be easily achieved using the 'Connect' module (see Updating Metrics – Importing) or as an alternative for one-off measures there is a manual method available.

At the moment we have only 'Viewed' the system on Monthly mode. Go to the top of the screen and click on the Calendar, select Yearly and the year you are inputting data for, click on Go:
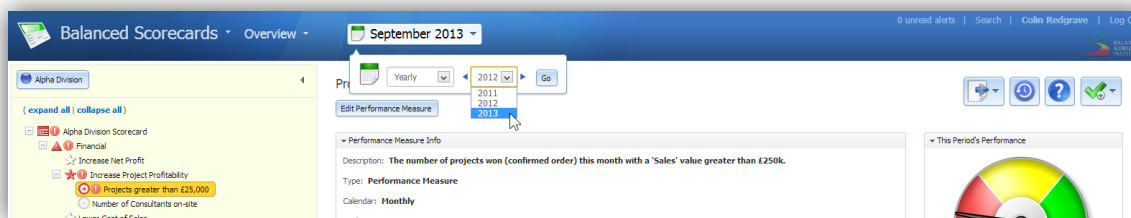
[Note: your administrator may have set up specific Fiscal Years for your company. If the year you require is not in the list, it will need to be set up in Administration].

Go back down to Actual and Threshold Values, you will now see a list of the months in that year. If you click on Update Performance Measures this time you can input data for the whole year:
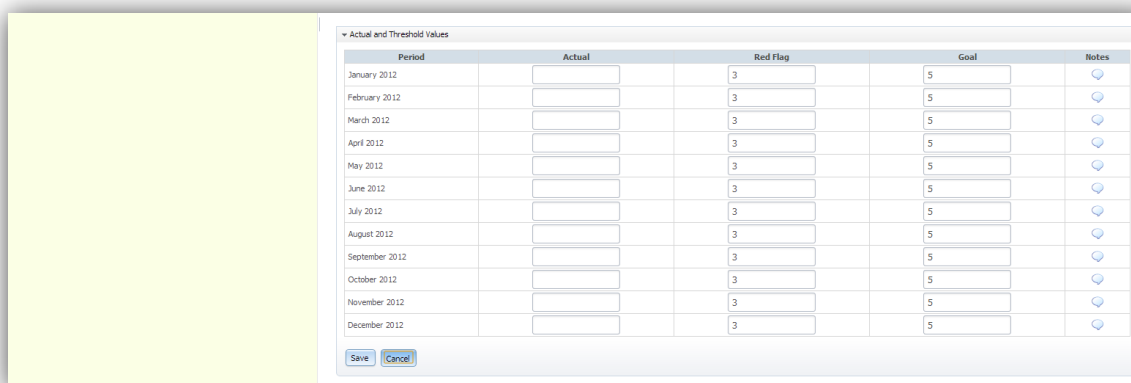

2. Updating Manually from the Welcome Screen

This feature allows assigned 'Updaters' to update all of their Performance Measures from one place. An Updater can be assigned to a Performance measure from the Overview screen or as part of the Administration set up. Either way, once a person has been assigned as an Updater, all of the Performance Measures they update will be presented when they sign on and reach the Welcome Screen.

If you have been assigned as an Updater, go to the main menu and select My Bookmarks. If it has not been automatically selected, click on Welcome Screen in the left hand panel, you will see a screen similar to the following:

In the section called 'Performance Measures I Update' click on 'Update My Performance Measures'. All of the Performance Measures that have been assigned to you will appear. They have been colour coded to reflect the current status. You will also notice there is a comments icon to the right that allows you to add comments to the Performance Measure as well:
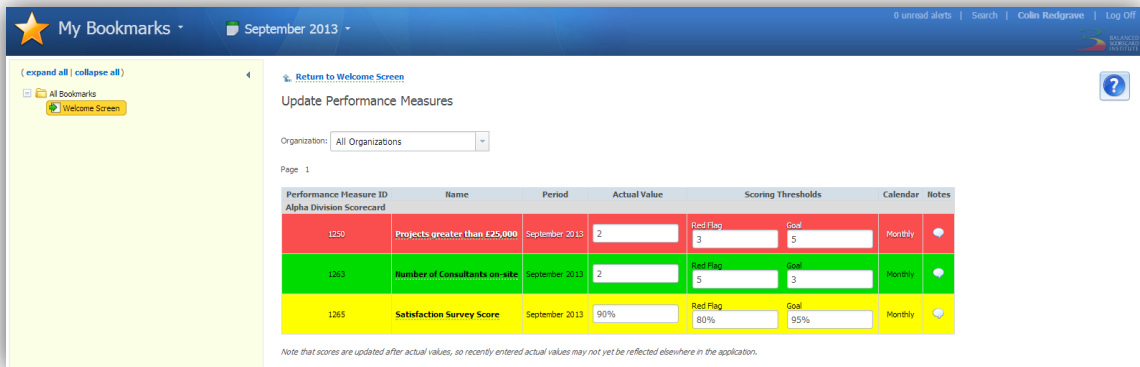
This function is very useful as it means you do not have to navigate the system to update your Performance Measures. When all of the Performance Measures have been updated you should see and Overview similar to this: