Guide to Software Enhancements in Scoreboard/QuickScore Version 2.16

Report Templates

The latest version of the software has the ability to create report templates. This matches the existing template functionality of scorecards and dashboards.

To create a report template, right-click on the source report and select "Copy".

When you paste the report, you now have two choices. You can either create a new, independent copy as before, or you can now link as a template.

If you choose the template option, you can choose a prefix or suffix for the report name, just like you can with scorecards and dashboards.



Figure 1: Copying a report

Create a new, independent copy.	Link as a template.
ny changes made to the original report in the future will not affect	Any future changes made to the original report will also be made to
iis copy.	this copied report. You will not be able to ealt the copied report.



You may op new report	tionally add a prefi will have the same	x or suffix to the name o name as the template.	f the new report. If you choose to add	neither, the
	(phrase before)	Template Report Name	Copy I	
1	Before Red Metrics Report		After Red Metrics Report Copy	

Figure 3: Choosing prefix and suffix

The new templated report also automatically remaps report filters to the scorecard objects in the new organization.

🥳 Reports 🛛 🖣	🗩 Quarter 2, 2	012 ►		1	6 unread ale	e rts Search	QuickScore Ac	Iministrator Log Off
Finance (Tier 2) Reports (expand all collapse all) Collapse all) Red Metrics Report Cory New Report	4	Red Metrics Edit Hierarchy No Sort by Organiza	Report Copy des Template: Red Metrics R tion Node/Hierarchy ordering	port			N	• (1) (2)
		Hierarchy Node Id	Hierarchy Node Name	Organization Node	Owners	Updaters	Quarter 1, 2012	Quarter 2, 2012
							Value	Value
	20	Utility Rates	Mayberry Utilities	Dan Montgomery	Conor Crimmins Dan Montgomery Scott O'Reilly	\$0.1084	N/A	
		26	Revenue per Customer	Mayberry Utilities	Dan Montgomery	Dan Montgomery Scott O'Reilly		\$1,195
		43	Non-residential Revenue	Mayberry Utilities		Scott O'Reilly		\$9.00
		27	Product and Service Introductions	Mayberry Utilities	Dan Montgomery	Dan Montgomery Scott O'Reilly		0
		34	Community Image	Mayberry Utilities	Dan Montgomery	Dan Montgomery Scott O'Reilly		83.7%
		35	System Uptime	Mayberry Utilities	Dan Montgomery	Dan Montgomery Scott O'Reilly		99.41%
		36	Carbon Emissions	Mayberry Utilities	Dan Montgomery	Dan Montgomery	1,506	1,506

Figure 4: The new templated report

Copy and Paste Organizations

There is now the ability to copy and paste organizations in the software. You can choose to copy an individual organization, or an organization and all of its descendant organizations. Equations in calculated metrics are even automatically remapped to the new objects when multiple organizations being copied reference each other.

To get started, just right-click the organization you want to copy and select "copy".



Figure 5: Copying an organization

Once you've copied the organization, right-click on the organization that you'd like to paste under and select "paste".



Figure 6: Pasting an organization

This brings up the paste menu. To create a new, independent copy, click on the left option.

If the organization that you have copied has descendant organizations, you can choose to either paste the single organization or the organization and all of its descendants.

Organization Templates

In addition to being able to copy and paste independent organizations, you can also choose the right option, which creates an entire templated organization.

Copy IT (Tier 2) an Copy IT (Tier 2) and it Copy only IT (Tier 2) and Copy only IT (Tier 2) Create a new, independent copy. Any changes made to the original organization in the future will not affect this copy.		nd its child organizations	
		child organizations	
		Any future changes made to the original organization's scorecard, dashboards, and reports will also be made to this copied organization.	

Figure 7: Choosing to include descendants or not



Figure 8: Linking the Organization as a template

This brings up the naming menu where you can choose a prefix and suffix for the Organizations, Scorecards, Dashboards, and Reports.

F	aste Organization		х
	You may optionally add a prefix o dashboards, and reports. If you o template.	or suffix to the name of the new organization and its scorecard, choose to add neither, the new objects will have the same name as the	
L	Organization Naming		
L	Copy: 1	Template Organization Name (phrase after)	
L	Before IT (Tier 2)	After Copy: IT (Tier 2)	
	Scorecard Naming		
	(phrase before)	Template Hierarchy Name (phrase after)	
L	Before Hierarchy	After Hierarchy	
	Dashboard Naming		
	(phrase before)	Template Dashboard Name (phrase after)	
L	Before Dashboard	After Dashboard	
Ľ	Report Naming		
	(phrase before)	(phrase after)	
	Before Report	After Report	
ŀ		Finish Cancel	

Figure 9: Prefixes and Suffixes for all object types

After the templated organization copies have been created, you can view them in the organization tree just like any other organizations.



Figure 10: Templated copies of organizations

If you want to delete an organization that has templated copies, there is also now an aggressive delete confirmation box. You must type the word "delete" to delete the organization because of the potentially severe ramifications.

De Br	leting Copy: IT (Tier 2) will delete all of its de efing Books, Reports, Initiatives, and Docume	scendants, which includes the Scorecards, Dashboards ints for the following organizations:
Copy: IT (ïer 2)	
Copy: IT-S	ecurity Department (Tier 3)	
Tupo the w	and "delate" to confirm that you want to come	plate this action
Type the w	~	piete tris action.
delete	ł	
	Delete	Ganaral

Figure 11: Delete confirmation

Scorecard Templates Upgraded to Organization Templates

Because there are now organization templates, and because there can only be one scorecard per organization in the software, we have moved all existing scorecard template relationships to the organization level. We have also removed the ability to create new scorecard templates on their own. Scorecard templates must be created at the organization level. Report and Dashboard templates can be created either at the organization level or individually.

We were very careful to make this upgrade process completely transparent to the end user. No existing template/copy relationships were affected, and no new objects were created. Any templated scorecard organizations that had dashboards and reports before the upgrade will continue to have their reports and dashboards operate independently.

Any new reports or dashboards created in templated organizations will be automatically copied to the organization copies. Any reports or dashboards that existed before the upgrade process will not be automatically copied to the copy organizations. If you have an organization that became templated as part of the upgrade process, and it has dashboards or reports that you'd like to copy to the organization copies, there is a way to do that manually. Just copy and paste the report or dashboard from the source organization into the same source organization. This will create a new copy of the report or dashboard, which will then be copied to the copy organizations.

The result of these changes is that all existing scorecard relationships will continue to behave exactly as before, but newly created objects will take advantage of the new templated organization functionality.

Ability to Automatically Aggregate Metrics Across Organizations

There is a new aggregation type for metrics called "Rollup". This automatically sums metrics from children organizations that are based on the same organization templates.

To set up these automated rollup metrics, first create an organization to be used as a template. Any metrics that you want to be automatically calculated should have the update type of Rollup. Then create templated copies of that organization in a tree structure. Finally, update the metrics in the organizations at the bottom of the organization tree. The metrics in the organizations higher up the tree will automatically have calculated values based on the metrics in lower organizations.

Metric Comparison Report

The latest version of the software has a brand new version of the metric comparison report. As before, you can compare similar metrics across organizations. With the new version of the report you can also choose which metrics you would like to compare.

To start building a metric comparison report, select "Metric Comparison" from the new report menu.

and the	Percentage 🗘
Aggregation Type:	Average \$
Import Mapping Key:	21
Truncates beyond precisi Leave blank to use defau	ion)
Actual Values	Manual
Actual value:	
Red Threshold:	Manual \$ 85%
Red Threshold: Green Threshold:	Manual ♦ 85% ✓ Manual Calculated Rollup

Figure 12: The new Rollup update type



Figure 13: The metric comparison report

The next step is to choose which organizations you want by selecting them from the organization tree on the left.

By default, only the organizations you click on will be shown in the report, but you can also choose the following options for an organization you select:

- This organization
- Only children
- Only Descendants
- This organization and its children
- This organization and its descendants.

Descendants mean any organization under the selected organization. Children mean only the organizations one level below the selected organization.

The second step is to choose which metrics you want to see in the report. You can either choose metrics individually, or you can choose a scorecard object higher up the tree and automatically include all metrics underneath it.

The sub-metrics checkbox allows you to also include metrics underneath other metrics.

R	Reports			
Metric Comparison Report				x
Please select an organization node.		Organizatio	n Node	
(expand all collapse all)	Marketing 🕕	×	this organization	\$
Mayberry Utilities	IT (Tier 2) 🚺	×	this organization	\$
Finance (Tier 2)	Finance (Tier 2) 🚺	×	this organization	\$
🖃 🛑 IT (Tier 2)	Mayberry Utilities	×	✓ this organization	
 IT-Security Department (Tier 3) Marketing 			only children only descendants this organization and its of this organization and its of	children descendants
	Cancel Next			

Figure 14: Choosing organizations

Metric Comparison Report	ons	x
Select a Hierarchy Object (expand all collapse all)	Selected Scorecard Objects	Sub- Metrics
 Mayberry Utilities Tier 1 Customer Financial Internal Business Processes Product and Service Introductions Product and Service Introductions Triprove Efficiency and Reliability of Services Employee Productivity Community Image System Uptime Carbon Emissions Thernove Customer Communications Employees & Organizational Capacity 	Carbon Emissions 1 × System Uptime 1 × Community Image 1 × Employee Productivity 1 × Product and Service Introductions 1 × Mayberry Utilities Tier 1 > Financial ×	
	Back Cancel Next	

Figure 15: Choosing metrics

The last step is to choose report options. You need to choose which calendar period to show the results for, and there are also several checkboxes on the bottom. These allow you to show the calendar column, the goal column, and to invert the axes.

		riod to dis	play			
	Calendar	Month	ily 👻			
Calen	dar Period	April 2012	2 -			
Display	settings					
Show	v calendar col	umn				
Show	v goal column	l				
Travos	t axes (lists t	he organiza	tions on the l	eft and the r	netrics on the ton)

By default the metric comparison report lists the metrics vertically and the organizations horizontally. Figure 16: Report options

Reports					dministrator	
Mayberry Utilities	Metric Comparison - April Modify This Search Save	2012			••	?
(expand all collapse all)	Metric	Mayberry Utilities	Finance (Tier 2)	IT (Tier 2)	Marketing	
Saved Reports	Financial				-	
Strategic Initiatives Report	Days Receivables	27	50	34	20	
Red Metrics Report	Non-sales Revenue	\$18.00	\$0.00	\$23.00	\$2.00	
Metric Comparison April 2012	Costs	\$307.00				
en Metric Companson - April 2012	Sales Revenue	\$332	\$2.69	\$219	\$535	
New Peret	Revenue per Customer	\$1,195	\$1,273	\$1,940	\$1,941	
New Report	Non-residential Revenue	\$9.00	\$9.00	\$22.00	\$40.00	
	Internal Business Processes					
	Product and Service Introductions	<u>o</u>	Ö	0	<u>0</u>	
	Employee Productivity	\$1,515	\$467	\$920	\$431	
	Community Image	83.7%	94.5%	90.1%	77.8%	
	System Uptime	99.41%	99.79%	99.08%	99.18%	
	Carbon Emissions	1,506	843	1,763	1,543	

Figure 17: Report results

Organizatio Node Costs Sale Product and Service Employee Productivity System Uptime Carbon unity dential Tma Introduction C Do **Mayberry Utilities** Finance (Tier 2) IT (Tier 2) Marketing

Figure 18: Report results with inverted axes

If "invert axes" were chosen earlier, it would list the organizations vertically and the metrics horizontally.

Mass-edit for How to Treat Missing Metric Values in Equations

For quite a while the report writer has had the ability to edit many scorecard objects at once. One of the new things it can edit, however, is the way to treat missing values in equations.

To make abandon to all calented biovarday ander, calent a field to abando, anter the new value	
and select Save.	
Change Missing Values	
Missing Values Make equation blank	
Treat as 0 Ignore	

Figure 19: Mass-edit for equation missing values

Easier to Identify Dashboard Images

When a dashboard is in edit mode, you can now hover over an image to see what its name is. This is very helpful when determining what images a dashboard is using.



Figure 20: Showing the image name on mouseover

Scorecard Owner/Updater Report Defaults to Not Metrics Only

When creating a new Scorecard Owner/Updater report, the "include metrics only" option is now unchecked by default.

Select a User:	All Users	-	
Select an Organization Node:	Mayberry Utilities Choose		
Responsibility Type:	Owners and Updaters \$		
Include Metrics Only:			
S	Cancel		
	Mayberry	Dan	-

Figure 22: Metrics only defaults to off