

Cascading (or Linked) Scorecards and Auto Rollup

Cascading (or Linked) Scorecards and Auto Rollup – Many types of scorecard need to be ‘cascaded’ to divisions or departments.

Often there is a need for scorecards of the same structure to be distributed across an organisation. For example, in the area of health and safety there are certain metrics that, sometimes by law, need to be collected by every department. Or, for example, in a call centre, operatives are all measured in the same way. In cases like this, it is desirable to have a single ‘master’ scorecard that can be copied multiple times, but more importantly, the multiple scorecards can be managed and updated via the master and not individually.

In Scoreboard and QuickScore there is an option to create **Linked Scorecards** as follows:

Linked Scorecards

1. Create the Master

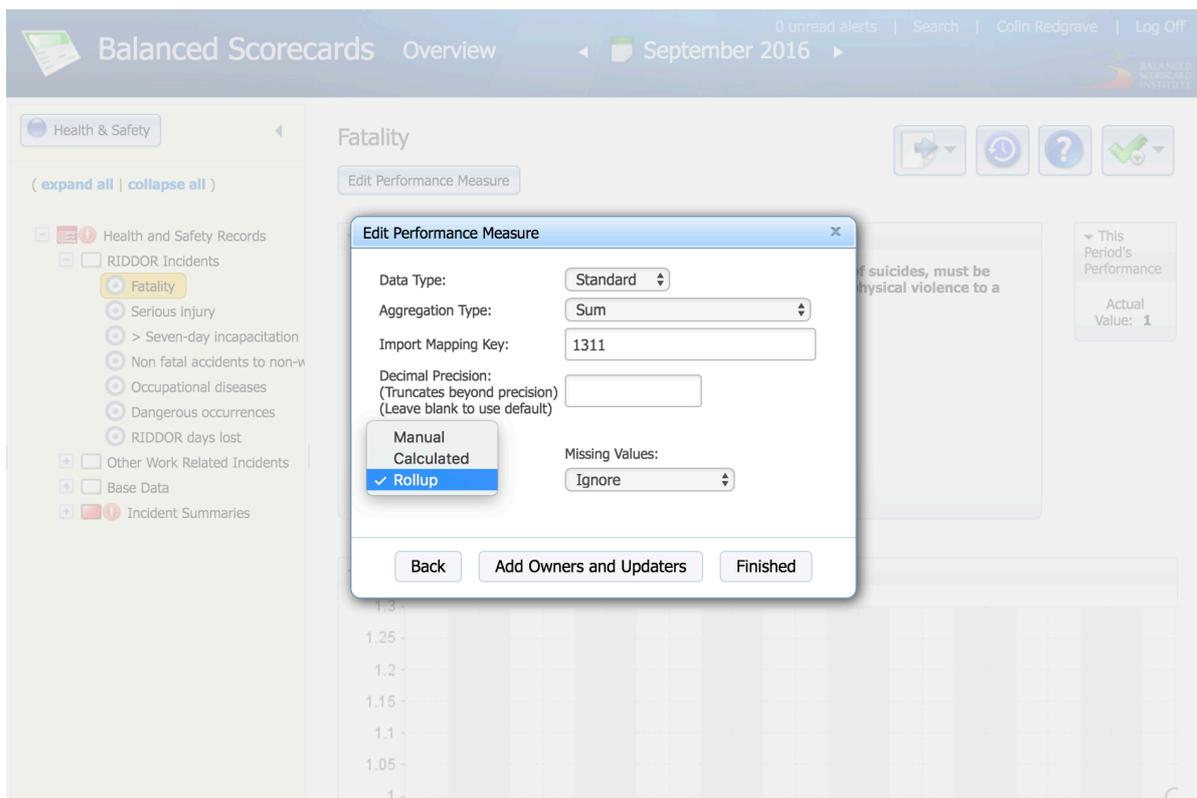
A master scorecard has to be created. This will act as the model for all other scorecards that are ‘linked’ to it. In the example below we have chosen to look at a typical Health and safety scorecard common in the United Kingdom that deals with RIDDOR (Reporting of Injuries, Diseases and Dangerous Occurrences) this is the Scorecard:

The screenshot displays the 'Balanced Scorecards Overview' interface for September 2016. On the left, a sidebar lists various organizations, with 'Health & Safety' selected and expanded to show sub-entities like 'Safety - London', 'Safety - Paris', etc. The main content area shows a 'Health & Safety' scorecard with a tree structure of metrics. The 'RIDDOR Incidents' category is highlighted in yellow and includes sub-metrics such as 'Fatality', 'Serious injury', '> Seven-day incapacitation', 'Non fatal accidents to non-workers', 'Occupational diseases', 'Dangerous occurrences', and 'RIDDOR days lost'. Other categories include 'Other Work Related Incidents', 'Base Data', and 'Incident Summaries'.

The scorecard above was created in exactly the same way as any scorecard is created. However, if, as in the example above, the linked scorecard appear below the Master scorecard, there is an option to **auto-rollup** the values of the metrics from the lower-level scorecards to the top level.

2. Select Auto Rollup

To do this, when creating the metrics, the **Rollup** option needs to be selected. This takes place on the third dialogue box immediately after selecting the Scoring Type as shown below, click on the Update Type drop-down and select Rollup:



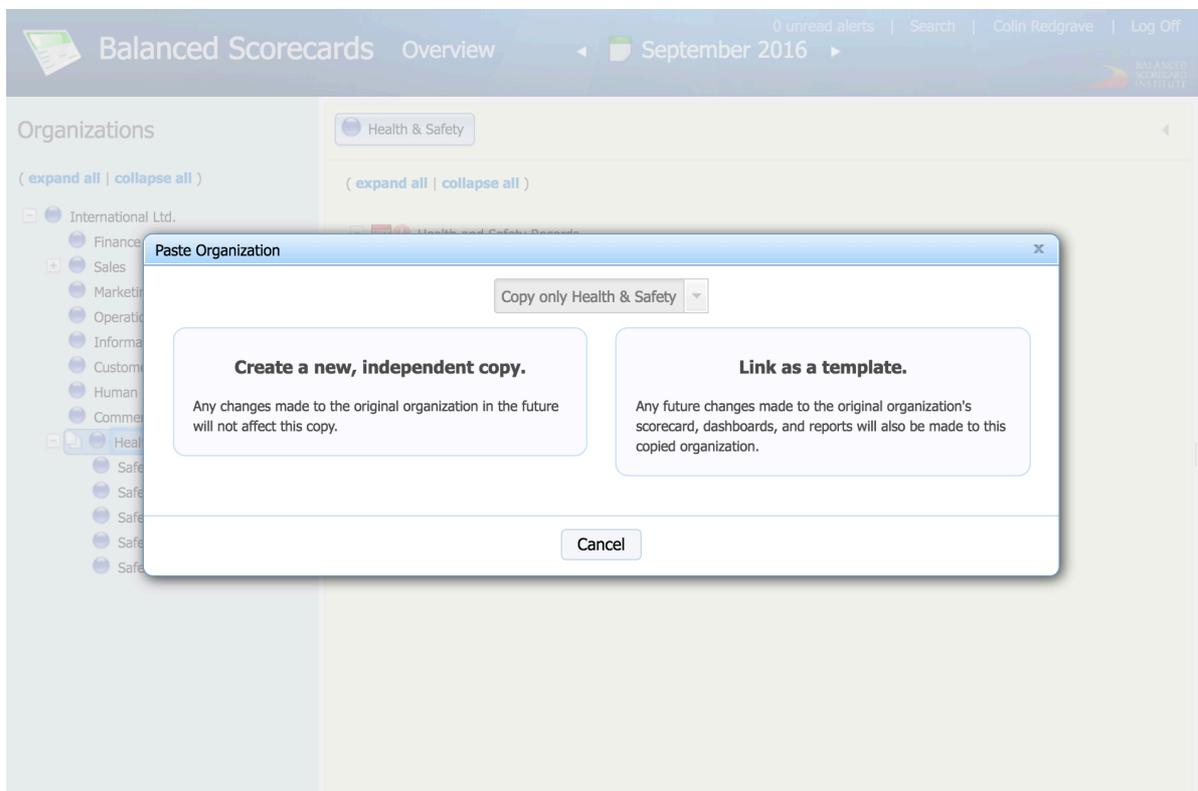
Use this option for every metric where you want the metric actual value to be rolled up from the lower levels to the upper levels. If you do not want the values to automatically rollup, omit this step.

3. Copy the Scorecard

Once the Master scorecard has been created, it can be copied to another location. This is usually below the master (it can be elsewhere, but the auto rollup will not work). Right click on the Master scorecard ORGANISATION and select Copy as below:



Right click again on the top-level destination, in the example have right clicked on Health & Safety and select Paste. A dialogue box will appear:



You will be given the option to create a new, independent copy of the Organisation and Scorecard or to Link to the Master you have just created as a Linked Template. Click on the box **Link as a Template** and the following dialogue box will appear:

The screenshot shows a 'Paste Organization' dialog box with the following fields and options:

- Organization Name:** A text input field containing 'Health & Safety'.
- Scorecard Naming:** A section with two input fields: '(phrase before)' and '(phrase after)'. The text 'Template Scorecard Object Name' is centered between them. Below are two options: 'Before: Balanced Scorecard' and 'After: Balanced Scorecard'.
- Dashboard Naming:** A section with two input fields: '(phrase before)' and '(phrase after)'. The text 'Template Dashboard Name' is centered between them. Below are two options: 'Before: Dashboard' and 'After: Dashboard'.
- Report Naming:** A section with two input fields: '(phrase before)' and '(phrase after)'. The text 'Template Report Name' is centered between them. Below are two options: 'Before: Report' and 'After: Report'.

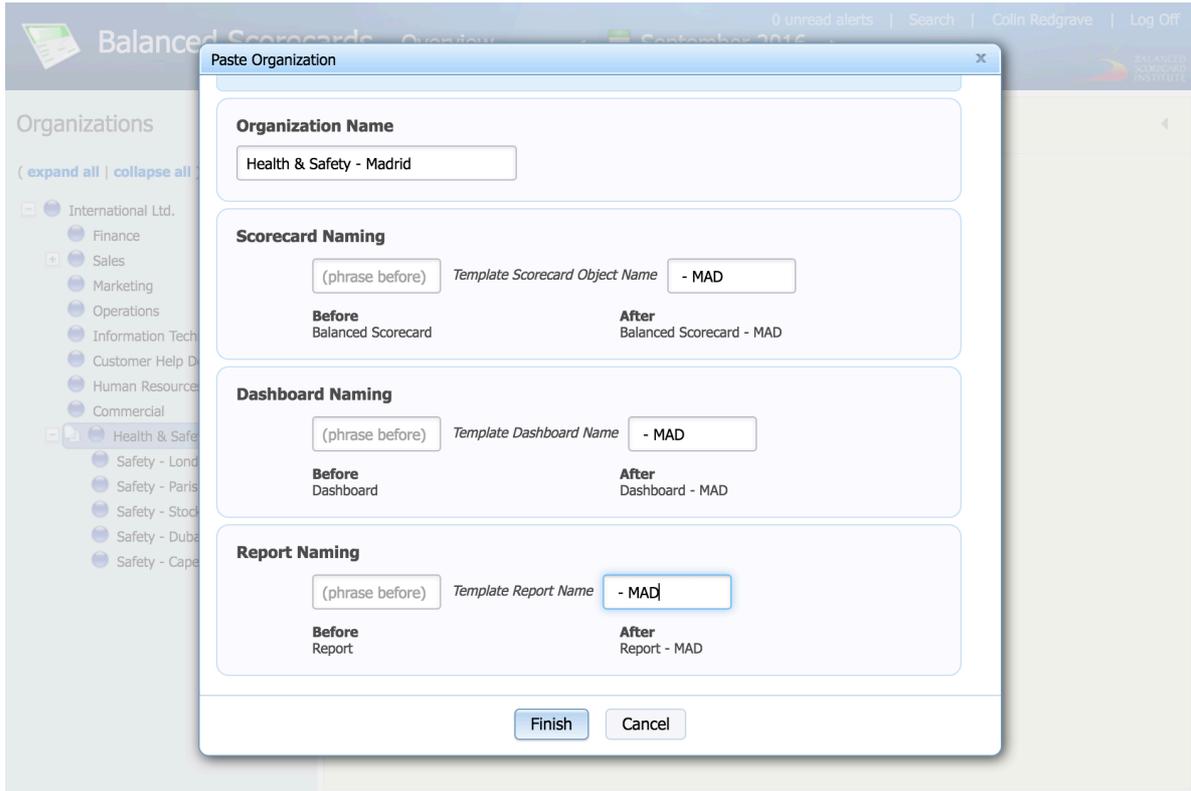
At the bottom of the dialog box are two buttons: 'Finish' and 'Cancel'.

5. Auto-Name the Elements (Prefix or Suffix)

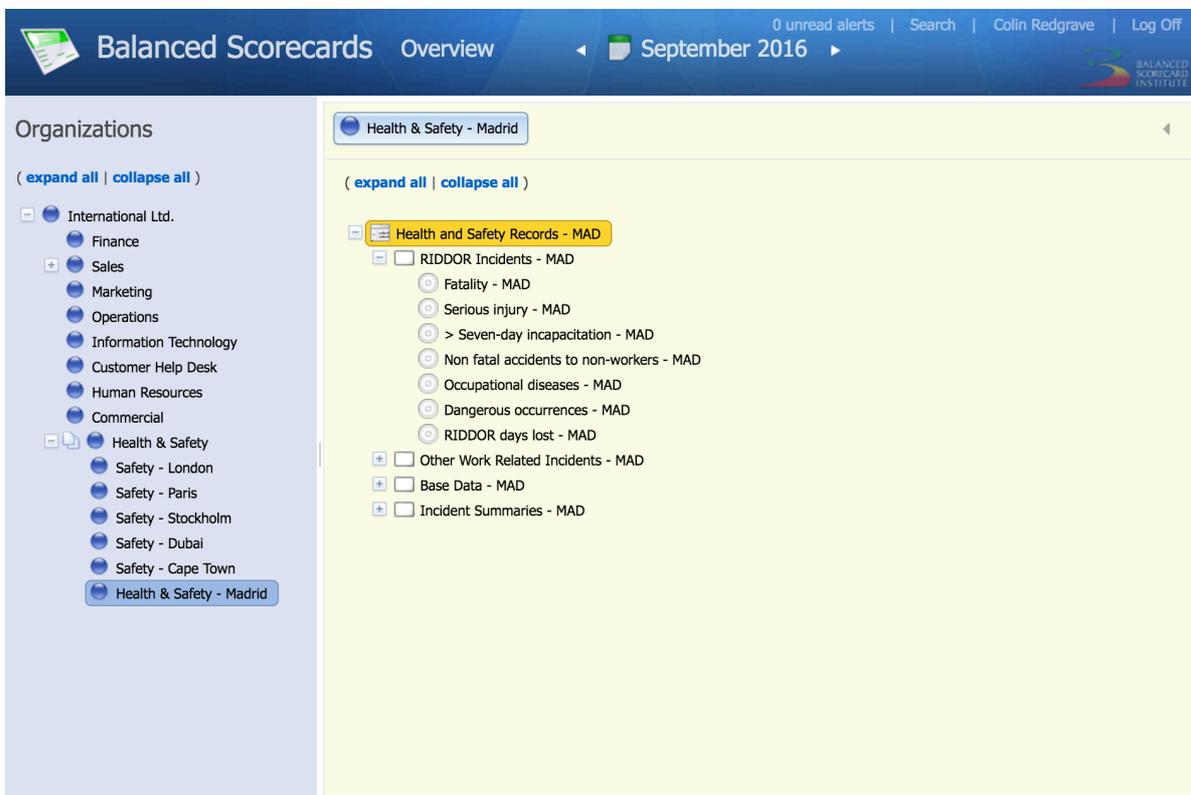
It is good practice to uniquely identify all elements in the system. To do this, you have been given the option to rename the Organisation and add a prefix or suffix to the scorecard objects.

NOTE: We strongly advise you to take advantage of this process step. Although the database holds a unique identifier for every element, if you use the same names it can be confusing at a later date when trying to differentiate between objects

In this example, we are adding the city of Madrid to our list of offices that need to complete Health and safety records and so will add Madrid to the Organisation name and MAD as a suffix to all other elements as below (note the space before the hyphen in the After field, this simply provides a tidy result):



Click finished and the new organisation will appear below your target. Click on your new organisation and you will see that the new scorecard has been created and the suffix applied to each element as below:



You will now find the ability to update the metrics at the top-level has been removed (where you selected Rollup) and values can only be added at the lower levels. These will in turn rollup to the top-level. This has occurred as the application has automatically generated the calculation to add up the lower level items. In the past, you would have had to do this by hand yourself, see [Calculated Metrics](#). Should you delete a scorecard, the application will automatically delete the appropriate calculations from the top-level.

End of Cascading (or Linked) Scorecards and Auto Rollup
