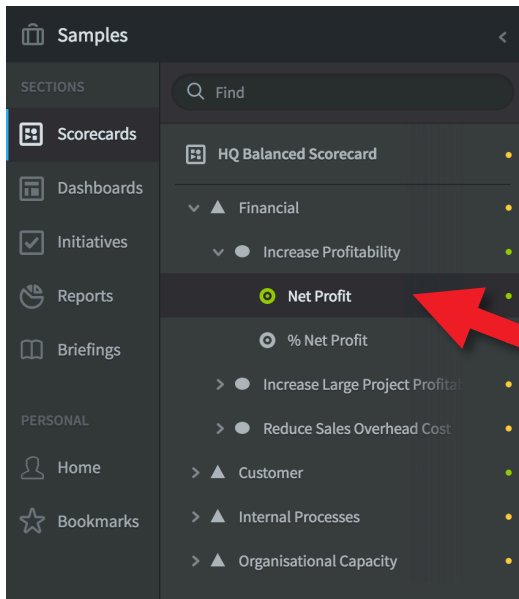




# Owners and Updaters - 1

Owners and Updaters can only be assigned to Scorecard elements and Initiatives. Owners and Updaters can only be users of the application. Before they are assigned they have to be added - See the user guide: Adding a User

There are two ways to assign an Owner or Updater. The first is to go direct to the Scorecard element or the second direct in an Initiative (page 3),



## Direct - in a Scorecard Element

Go to the Scorecard you are interested in then click on the element.

In the example to the right we have gone to the **Samples** scorecard, opened the **Financial Perspective** and the **Objective Increase Profitability** and clicked on the metric **Net Profit**

The metric data appears in the right hand panel. Towards the top right of the panel are two tabs. Click on **Edit**





# Owners and Updaters - 2

This will reveal the Edit panel you have already seen when you created the metric. At the bottom of this panel are the **Owner** and **Updater** fields. Click on **Add Owner** and start typing the name of the Owner or select from the drop-down list. Do the same for the Updater. **Don't forget to click Save**

Net Profit

Overview Metrics Edit November 2016

Name: Net Profit Type: Metric

Description: Total profit after costs and expenses (before tax) Weight: 50%

METRIC DETAILS

Scoring Type: Goal/Red Flag Calendar: Monthly Data Type: Currency

Aggregation Type: Sum Decimal Precision: Default

SERIES

Actual Value: Manual Red Flag: Manual Goal: Manual

29,000 30,500

OWNERS

Redgrave, Colin

UPDATERS

Redgrave, Colin

**YOUR RESPONSIBILITIES**

**My Tasks**  
You have 0 Tasks that haven't been completed.

**Metrics I Own**  
You own 2 Metrics.

**Metrics I Update**  
You update 4 Metrics.

Once an Owner or updater has been added to a metric the application will present these metrics to the Owner or Updater when they sign on.

Click on the **Home** button in the main menu and you will see this panel on the right hand side of the screen

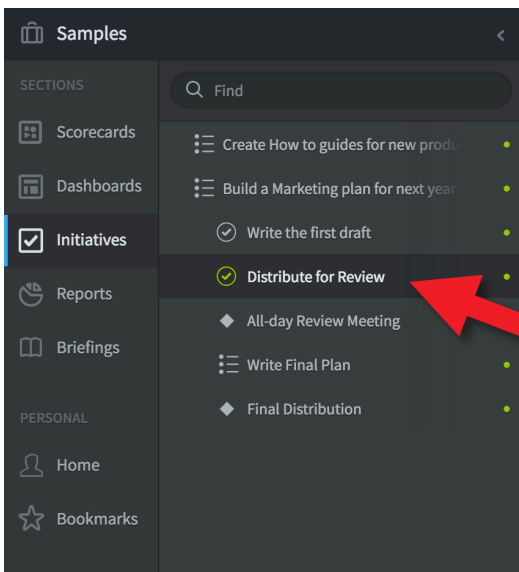
Click on **Metrics I update**



# Owners and Updaters - 3

The following panel will be revealed containing all of the metrics you have assigned to yourself. This makes it very easy to update your metrics in one go.

METRIC	PERIOD	ACTUAL	THRESHOLDS
<a href="#">Net Profit</a>	November 2016	31,897 \$	29,000 \$   30,500 \$
<a href="#">% Net Profit</a>	November 2016	20.7 %	19 %   20 %
<a href="#">Projects greater than £250k in value</a>	November 2016	5	4   6
<a href="#">Average time spent resolving a problem</a>	November 2016	22	20   10

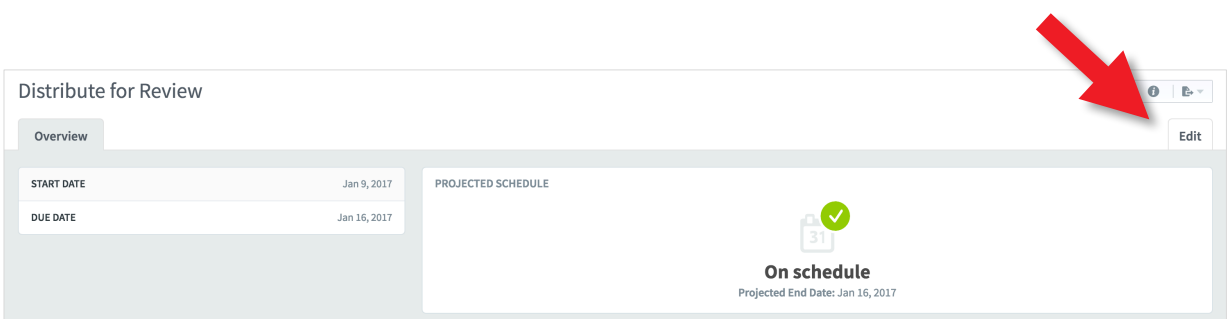


## Direct - In an Initiative

Go to the Initiative you are interested in then click on it or a task/milestone below it.

In the example to the right we have gone to the **Samples** initiatives, and clicked on **Distribute for Review**

Click on the **Edit** tab to towards the top-right of the screen as shown below.





# Owners and Updaters - 4

This will reveal the edit panel with the Assigned Users and Groups fields at the bottom. Start typing or use the drop-down to assign a user to the task. Once again, **don't forget to click Save**

Distribute for Review

Overview Edit

Name: Distribute for Review

Description: [Empty text area]

Type: Task

Start Date: 1/9/2017

Due Date: 1/16/2017

Total Budget: \$ [Empty field]

Advanced Options

ASSIGNED USERS AND GROUPS

Redgrave, Colin

Start typing

Once an Owner has been added to an Initiative, the system will present the information on the Home screen. Click on **Home** in the main menu and this time click on **My Tasks** in the panel towards the top-right.

Any owned initiatives will appear with a link to the initiative itself.

Home

Welcome

Alerts

**My Tasks**

My Metrics

Metric Updates

3 Initiatives

My Tasks

TASK NAME	START DATE	END DATE	% COMPLETE	BUDGET SPENT	TOTAL BUDGET
SAMPLES					
<a href="#">All-day Review Meeting</a>		Jan 24, 2017		\$0	
<a href="#">Build a Marketing plan for next year</a>	Jan 1, 2017	Jan 31, 2017	0%	\$0	\$15K
<a href="#">Create How to guides for new product</a>	Dec 1, 2016	Jan 31, 2017	25%	\$3.87K	\$20K