



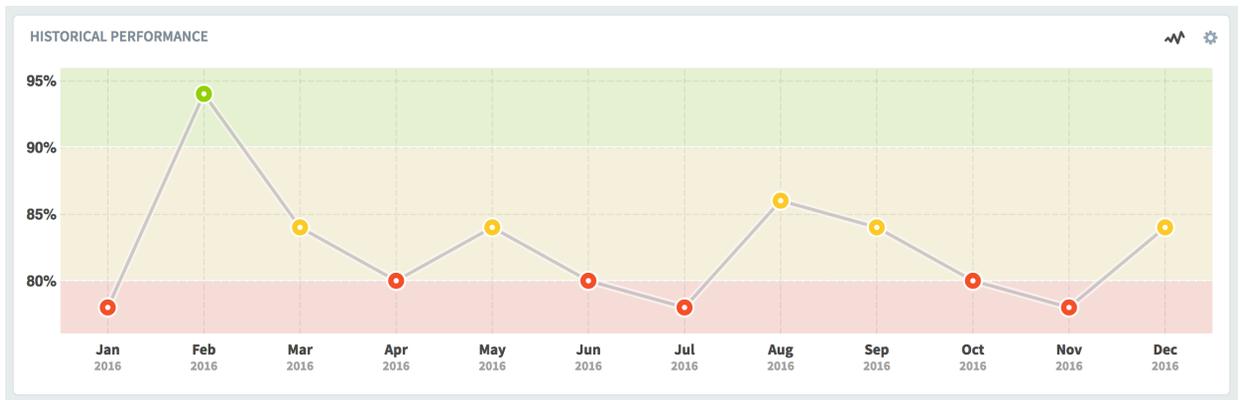
Setting Targets - 1

There are two parts to setting targets for Measures in the application:

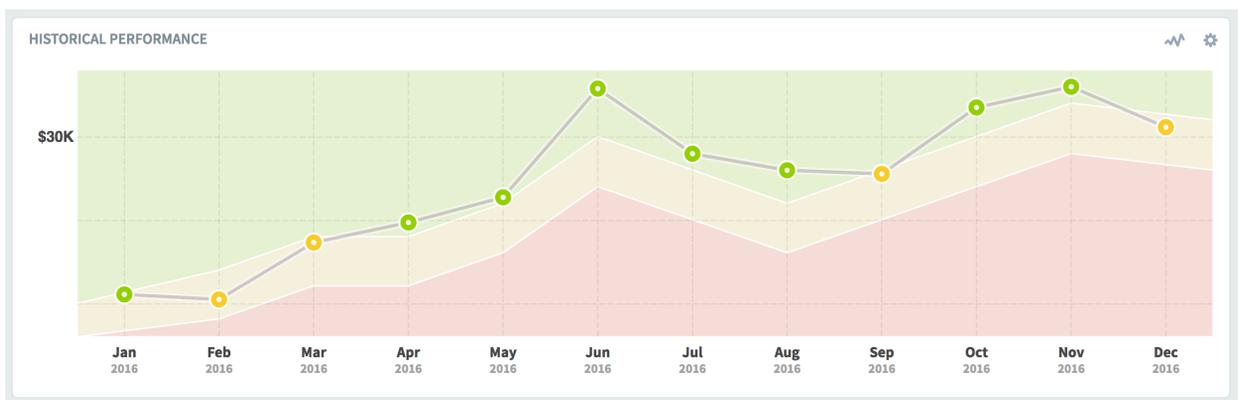
1. Updating the 'goal' and 'red flag' threshold values
2. Optionally adding an additional target line to the graph

1. Updating the goal and red flag threshold values

When measuring continuous improvements in a performance management system the monthly goal and red flag values usually remain the same for performance management cycle as can be seen in this example:



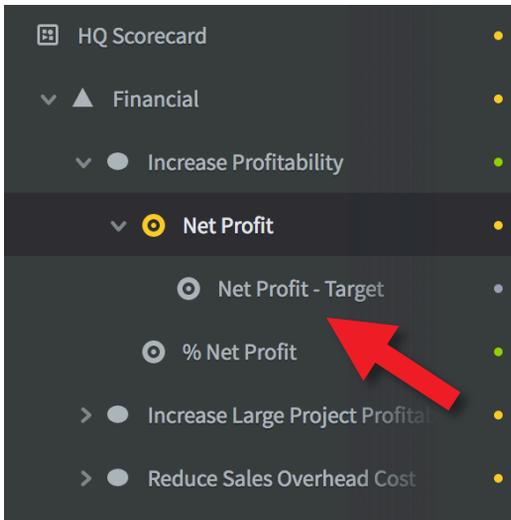
However, there are times when the performance measure has a specific target for each month. Typically, revenue or profit measures might look something like the example below.





Setting Targets - 2

Both the goal and red flag threshold values need to be updated when they change. This can be achieved by going to every month and manually changing the values. However, this does not provide enough flexibility and is a very tedious approach.

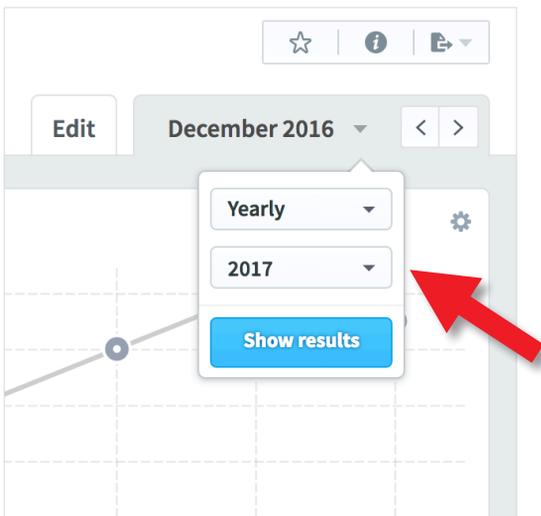


Using a Reference sub-Measure

A much better way is to add a 'target' measure and use this as a reference.

First, click on the measure you are interested in and create a sub-measure using the 'unscored' measure type.

The result should look similar to the example on the left where we have added **Net Profit - Target**



We are going to add all of the monthly targets for the following year in one go.

Click on the Date tab and select the Yearly view that you are interested in.

Click on Show Results.



Setting Targets - 3



The whole year will appear in the panel **Actual and Threshold Values**.

Click on Edit at the top right of the panel

The dialog box is titled 'Actual and Threshold Values: Edit Values'. It contains a table with the following data:

ACTUAL		
January 2016	29,000	\$
February 2016	29,200	\$
March 2016	29,400	\$
April 2016	29,400	\$
May 2016	29,600	\$
June 2016	30,000	\$
July 2016	29,800	\$
August 2016	29,600	\$
September 2016	29,800	\$
October 2016	30,000	\$
November 2016	30,200	\$
December 2016	30,100	\$

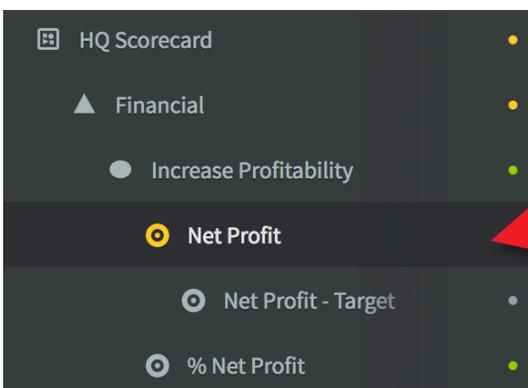
At the bottom of the dialog box, there are two buttons: 'Cancel' on the left and 'Save' on the right.

The Edit dialogue will appear. You can now add each monthly target for the entire year.

These targets will be used to build the threshold values and the target line in the measure you are interested in.

Note: this is a sub-measure. That is, it reside under and tiered to the right of an exiting measure. As such, it will not contribute to the scores in this scorecard tree

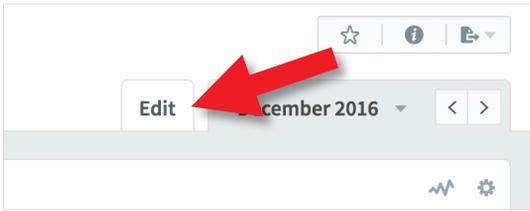
Click **Save**



Click on the Measure you where you want the target to appear, in this case **Net Profit**.

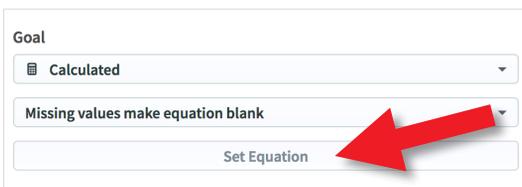
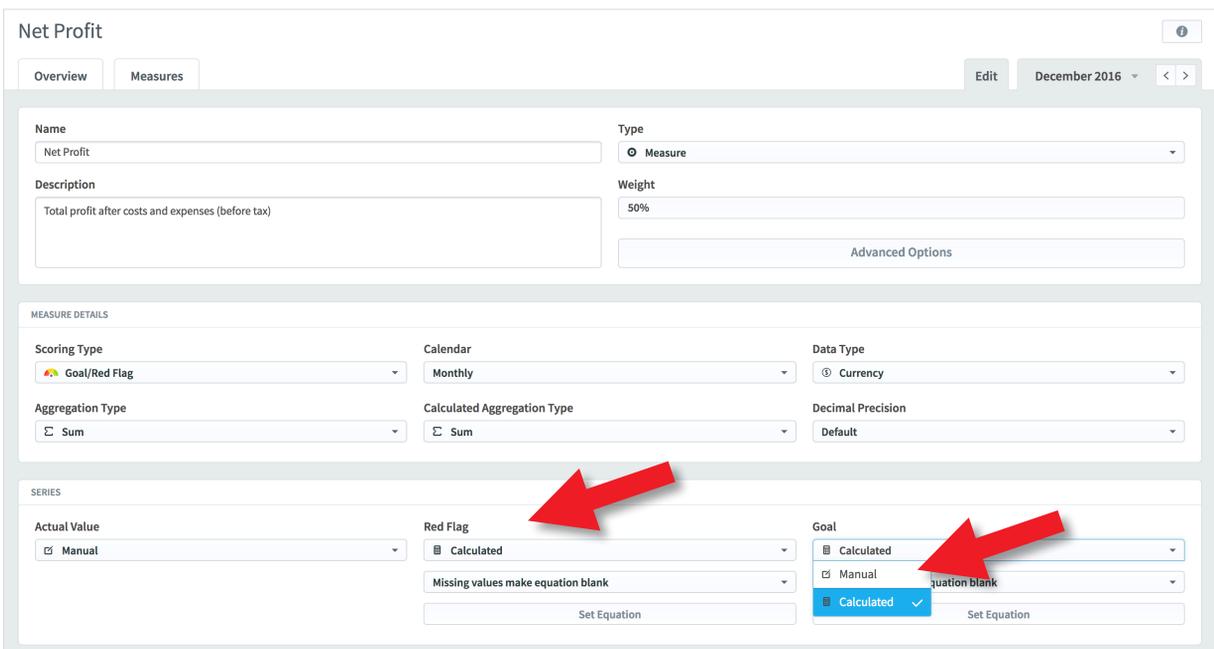


Setting Targets - 4

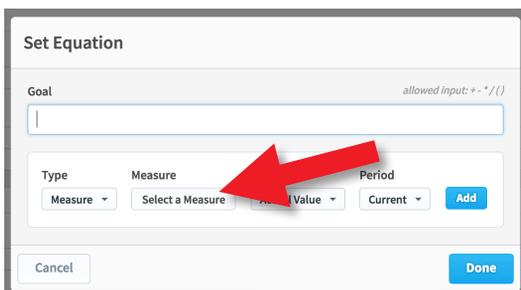


To reference the target measure we have just created we need to edit this measure. Click on **Edit** at the top left

The edit dialogue appears. Click on both the Red Flag and the Goal drop-down menus in turn and select **Calculated**



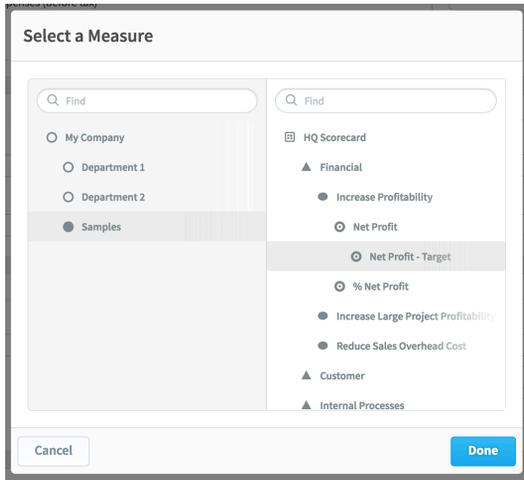
Click on Set Equation under Goal and the equation dialogue box will appear



Click on **Select a Measure**



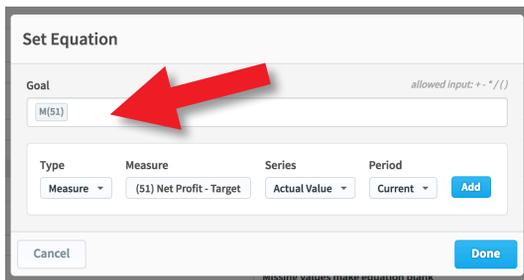
Setting Targets - 5



The Select a Measure dialogue will appear. Click on the Scorecard on the left and the target Measure you have just created on the right.

In this example we have highlighted **Net Profit - Target**

Click the blue Done button



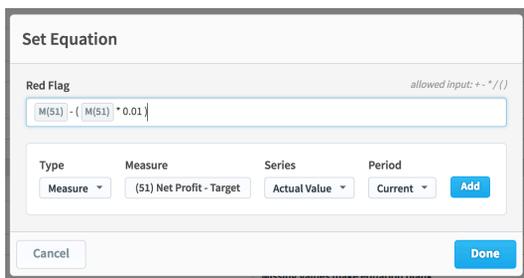
The target measure together with its unique identified appear in the measure box.

Click on Add and you will see the target measure as the **Goal** for this measure

Click Done



Click on Set Equation for the Red Flag



Go through the same process, but this time we are going to set the value as 1% lower than the target

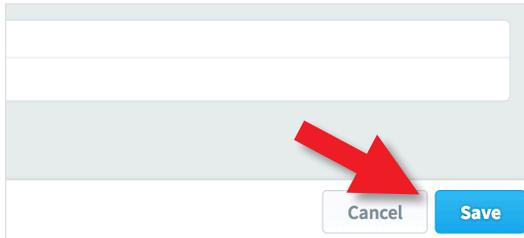
Take note of the equation it reads:

$$M(51) - (M(51) * 0.01)$$

Where M(51) is the target value and 0.01 is 1% as an actual value.



Setting Targets - 6



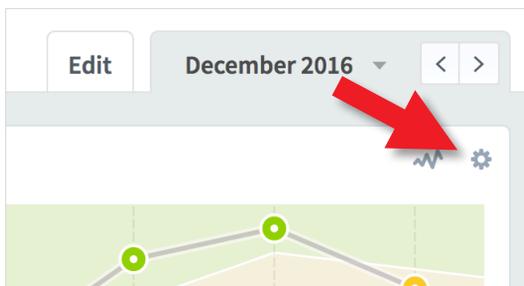
There is one **VERY** important last step. So far you have been clicking a Done button.

You now need to click the **Save** button!

After saving your equations (don't forget to click save) click on the **Overview** tab at the top of the page and you should see something like this:



As you can see, by using equations based on you Target measure, the thresholds now vary month on month.

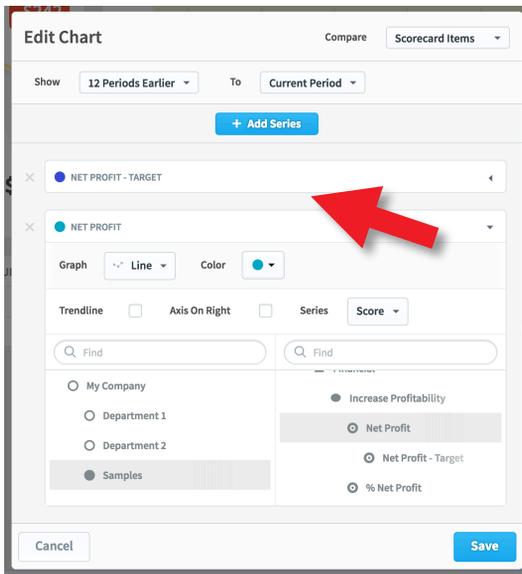


2. Adding a Target line (optional)

You may want to add a target line to your historical performance graph. Click on the small configuration cog at the top right of the line graph



Setting Targets - 7

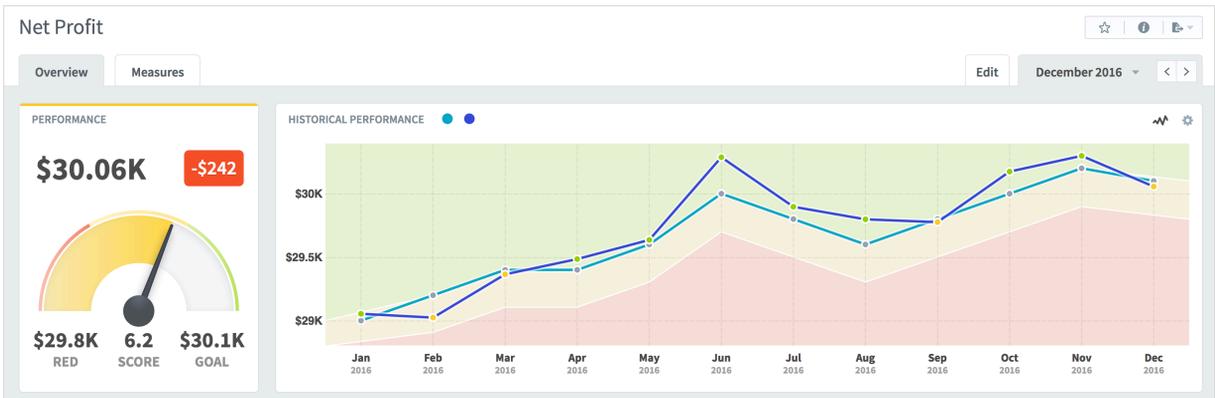


The edit Chart dialogue appears.

Highlight your target measure from the scorecard object list (be sure to do this first) and then click on **Add Series**

Your selected measure will appear in the list. You can change the colour of the line if you wish.

The result will look similar to the image below:



The same view with background threshold values switched off:

