



intra**focus**

QUICKSCORE

List of Functions and Features

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Introduction

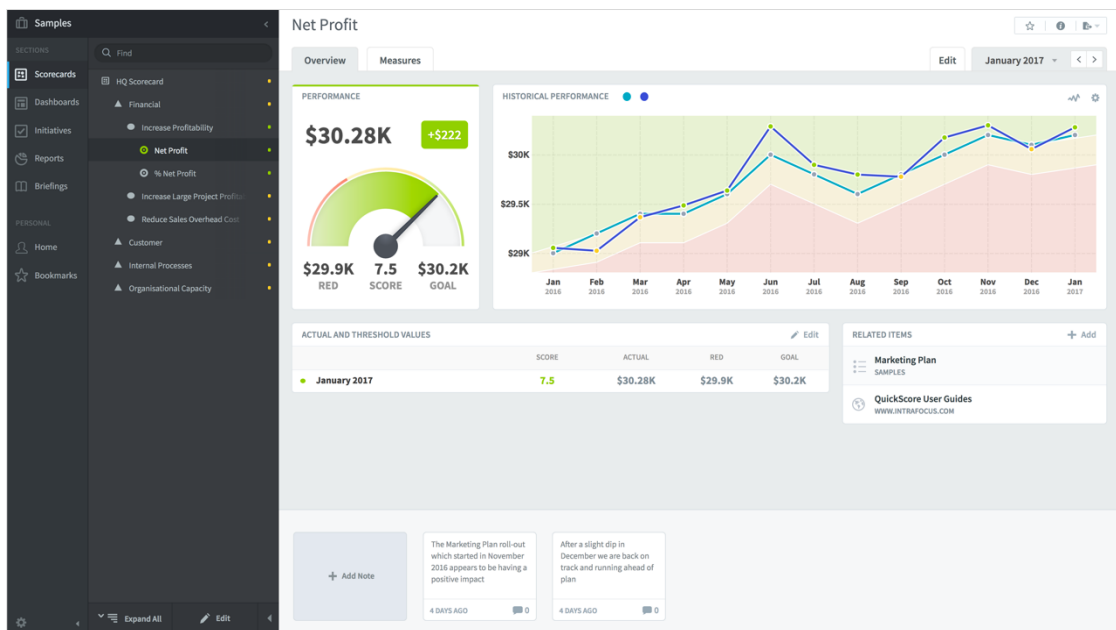
This document describes the functions and features of QuickScore which is a business performance management software package. In January 2017 Version 3 of the software was released. While Version 3 has provided a modernised interface, it does not include a few of the advanced features that are still available in Version 2. If these advanced features (which are indicated in the list below) are required, we advise our customers to either purchase Version 2 or wait for the features to be introduced into Version 3.1 later this year.

Version Differences

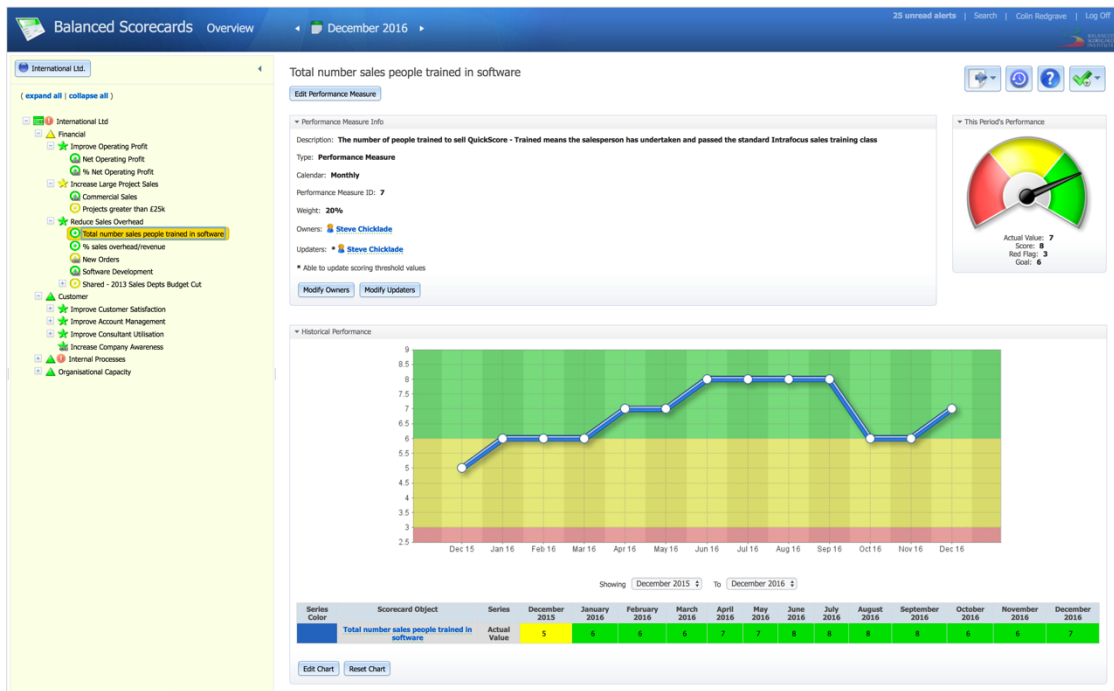
To illustrate the major interface differences in the interfaces of QuickScore Version 3 and QuickScore Version 2, we have included two screen shots. If you would like to look at the application in detail, there are two free-preview websites:

- [QuickScore V3](#) – Username: sam, password: smith
- [QuickScore V2](#) – Username: sam, Password: smith

QuickScore Version 3 - Screen shot of the main performance measure interface



QuickScore Version 2 – Screen shot of the main performance measure interface



Functions and Features

Performance Measures

Performance measures of various types can be defined in QuickScore. There are 11 scoring types the most frequently used are: goal/red flag, red/amber/green, red/green, red/green/red, red/amber/green/blue and unscored.

Performance measures can have an Owner and an Updater. When signing on to the application the owned and updater Performance Measures are presented in a single list on the home page. For the Updater, this means they can update all their Performance measures in one place.

Performance Measure Thresholds

Defined thresholds are the key to any business performance management system. By defining when a performance measure turns Red or Amber or Green (or Blue) the system can calculate a score and roll up a red/amber/green/(optionally blue) status from the metric level to an objective, to a department, to a division, to a company.

Calculated Performance Measures

A Performance Measure can take the form of a Calculated Metric. That is, rather than import an actual value, the Performance Measure can use other Performance Measures to calculate a result. Most operands and functions that are normally available in a spreadsheet can be used in a calculated Performance Measure

Organisation Tree

Any type of organisation can be defined in QuickScore. Any number of nodes can be added and any number of tiers. The organisation structure is key to the permissions function of the application.

Scorecards

There is a one-to-one relationship between an organisational node and a scorecard. Perspectives, Themes, Objectives and Performance Measures can be created in a scorecard. There can be as many or a few as are required.

Weighting

Objects within a scorecard can be weighted within the same tree.

Templated Scorecards, Cascade and Rollup

(not currently available in Version 3)

If the same scorecard is used for multiple departments, then a template can be created at the top-most level. The template can then be cascaded down to lower level departments or teams. Any changes to the scorecard need only be made once in the template. The changes will be cascaded automatically.

The Performance Measures in the Template can be set to 'Roll-Up'. The actual values in the lower-most scorecard will automatically be rolled up to the upper levels.

This type of scorecard is particularly useful for Health and Safety scorecards or for Telesales and Helpdesk scorecards.

Perspectives, Themes and Objectives

Perspectives, Themes and Objectives are both **objects** and **containers**. When defined as a container, other scorecard objects can be grouped together at a lower level. The application is highly flexible and the organisation of these objects is not restricted. A classic structure may look like this:

- Scorecard
 - Perspective
 - Objective
 - Performance Measure
 - Performance Measure
 - Objective
 - Performance Measure
 - Etc.

However, the application would equally allow a structure like this:

- Scorecard
 - Performance Measure
 - Objective
 - Performance Measure
 - Performance Measure
 - Theme
 - Performance Measure

Initiatives, Tasks and Milestones

Initiatives, Tasks and Milestones can be created within QuickScore. These follow the format of mini-projects and can be linked back to Performance Measures or Objectives.

Linked Objects

All objects within the scorecard and the scorecard itself can be 'linked' to any other object. This becomes a vital function when there are large amounts of data in the system. It is important to maintain a 'single source of truth' and not duplicate information. Linked Objects will contribute to the scoring process.

Related Objects

Where a link is required but scorecard scoring should not be impacted, a related item linkage can be put in place. This relates a scorecard object to another object within the system and allows a loop back to the original source. This is important when relating Initiatives to Performance Measures or Objectives.

Notes

Notes can be written against every scorecard object. The notes can be specific to a reporting period or can be written as 'universal' notes that will be maintained until deleted.

Alerts

An alert can be set based on a changed actual value, changed score or changed note written for any object in a scorecard. When an alert is triggered, an e-mail is sent to the person who set the alert and an alert is placed in the QuickScore users alert box.

Dashboards

QuickScore has a comprehensive dashboard tool. The tool will allow the user to create gauges, graphs of many styles, strategy map bubbles, backgrounds and to import images and text.

Any object created within the scorecard can be reference and rendered in a dashboard.

Note: In Version 3 a text editor is not currently available.

Strategy Maps

A Strategy Map is a special type of dashboard, these are available in QuickScore

Row and Column Reports

Row and column reports can be built in QuickScore. A point-and-click style Report Writer is available to create simple or more complex row and column reports depending on the users need.

Briefings

Multiple objects including scorecard items, dashboards, reports and Initiatives can be collected together to create a Briefings. The briefings can then be displayed in full screen mode as a presentation. It is possible to click on objects while in presentation mode to drill-down for further information.

Mobile Apps

(partially available in V2, fully implemented in V3)

QuickScore Version 3 has a fully functional mobile interface. The application can be used with any device.

QuickScore Version 2 has a mobile view-only interface. As a browser based application it can be used with a standard browser on mobile devices.

Shared Dashboards

All dashboards can be exported and shared. The function 'shared dashboard' allows the user to automatically create an HTML snippet that can be used in any web-based environment. The snippet dynamically generates the dashboard presenting updated values. Note: this is not simply an image, it is a dynamic dashboard externalized to another environment.

Archiving

All Scorecard objects can be archived with user defined dates.

Data Export

(not currently available in Version 3)

Scorecards, Dashboards, Row and Column Reports, Initiatives and Briefings can be exported to document formats including Word, Excel, PowerPoint and PDF. Single slides can be exported or in the case of a Briefing Book the whole book can be exported.

Users, Groups and Permissions

QuickScore is 'Role Based'. Every user must be assigned to a Group which defines their role within the system. For example, a Sales Group or Marketing Group or Executive Group. The Groups can then be assigned Viewing permissions to any node in the organisational tree. This way users can be restricted to see only what they are required to see.

Data Import and Integration

Data can be imported to QuickScore in a variety of ways. Typically, this may be by importing a set of monthly actual values via a spreadsheet. Imports can be scheduled. The application will accept update data for performance measure values, performance measure thresholds and Initiative values.

There is no automatic synchronisation function. Data can be automatically imported into QuickScore but data must be manually exported from QuickScore.

QuickScore has an integration tool called Connect that can link directly to spreadsheets and a variety of databases. Automated updates can be created and scheduled.

Web Based

QuickScore is a web-based application and supports all the primary web browsers. QuickScore can be hosted on cloud servers or in a private network.