

VERSION 3

QUICKSCORE

AN INTRAFOCUS GUIDE

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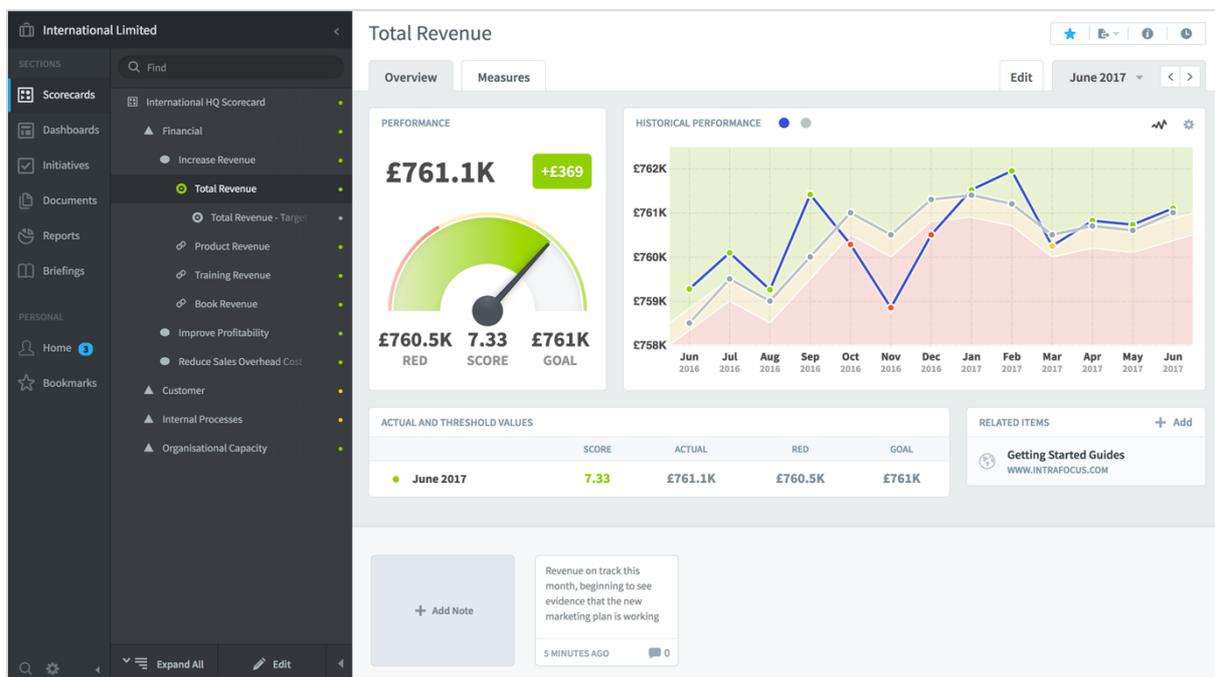
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QUICKSCORE VERSION 3

This document describes the functions and features of QuickScore, a business performance management software package. In July 2017 Version 3.1 of the software was released.

This version of the software provides a modernised and highly intuitive web-based interface. It also takes advantage of internet based mobile technologies making it fully mobile compliant for all devices.

As can be seen from the illustration below, QuickScore has maintained its primary function as a business scorecard and KPI manager. The software has been refined over 12 years to present what is essential in the direct interface with secondary and tertiary functions selectable through tabs and information buttons.



FUNCTIONS AND FEATURES

ORGANISATIONAL TREE

An Organisation is a container within QuickScore for Scorecards, Dashboards, Reports, Documents, Initiatives and Briefings. An organisation can be selected at any time by clicking on the briefcase icon at the top-left of a page.

Any type of organisation can be defined in QuickScore. Any number of containers 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. Scorecards need to be created before any other objects.

PERSPECTIVES, THEMES AND OBJECTIVES

Perspectives, Themes and Objectives are containers for each other (and Performance Measures) within a Scorecard. The order in which these objects are created is not restricted. A Perspective could contain several Themes and Objectives. Equally an Objective could contain a several Perspectives and Themes. The application is highly flexible and the organisation of the objects is not restricted either. Each object will derive a

'score' from the Performance Measures below it. The Scores are rolled-up through the structure that has been created. A classic structure may look like this:

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

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

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

PERFORMANCE MEASURES (KPIs)

Performance measures (often referred to as KPIs) 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. QuickScore recognises who has signed on to the application and will present all Owned and Updater Performance Measures 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. Calculations can be performed on actual values and threshold values.

WEIGHTING

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

SCORES

Every Performance measure is 'Scored' within QuickScore. It does not matter if it is a numeric value, percentage, currency or yes/no indicator. The actual value is normalised and the score calculated based on the thresholds. The resulting score will be between zero and ten.

Each score is then rolled-up to the next level and will continue to roll-up to the uppermost scorecard level. This means that at any point in the scorecard red/amber/green position can be displayed. This is especially useful when building dashboards.

DASHBOARDS

DASHBOARD TOOL

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

Many objects created within an organisation container can be reference and rendered in a dashboard. This includes scorecard objects, initiatives, reports and documents

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.

STRATEGY MAPS

In QuickScore a Strategy Map is a special type of dashboard. A strategy map is usually associated with the four perspectives found in the Balanced Scorecard methodology. Strategy maps can be created by importing backgrounds and overlaying them with strategy map bubbles.

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.

The Initiative handler is comprehensive but it is not a project management tool. It should be thought of as a means to monitor high level outputs from projects or to link milestones to performance measures.

Calculated measures can be used within a scorecard to directly link to outputs like % Time Elapse, Total Budget, Projected Schedule Variance etc.

DOCUMENTS

Often it is necessary or a regulatory requirement to associate documents to scorecards. QuickScore has a document manager specifically for this purpose. Documents can be added to the system and sorted into folders.

The documents can be linked to through the Related Items function

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.

TEMPLATING

If the same scorecards, dashboards and reports are used for multiple organisations/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.

MISCELLANEOUS FUNCTIONS

MOBILE INTERFACE

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

LINKED OBJECTS

All objects within a 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 ITEMS

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.

ARCHIVING

All Scorecard objects can be achieved with user defined dates.

DATA EXPORT

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

SCREENSHOTS

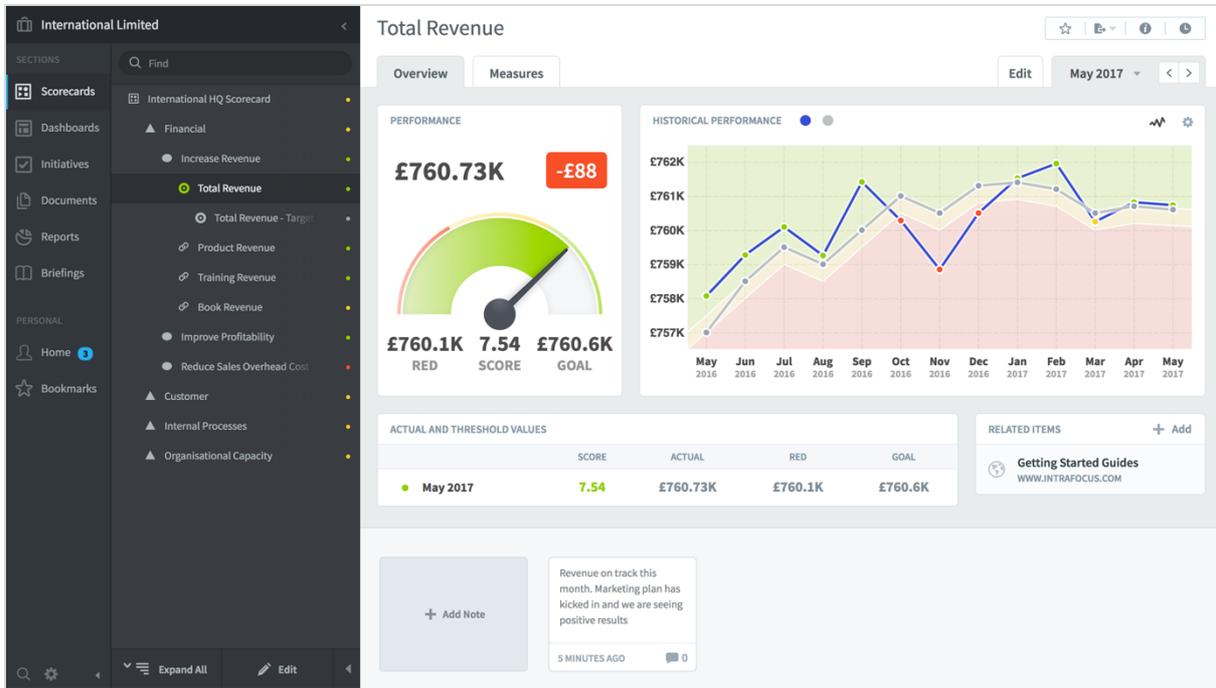
Home Screen

Organisation Tree

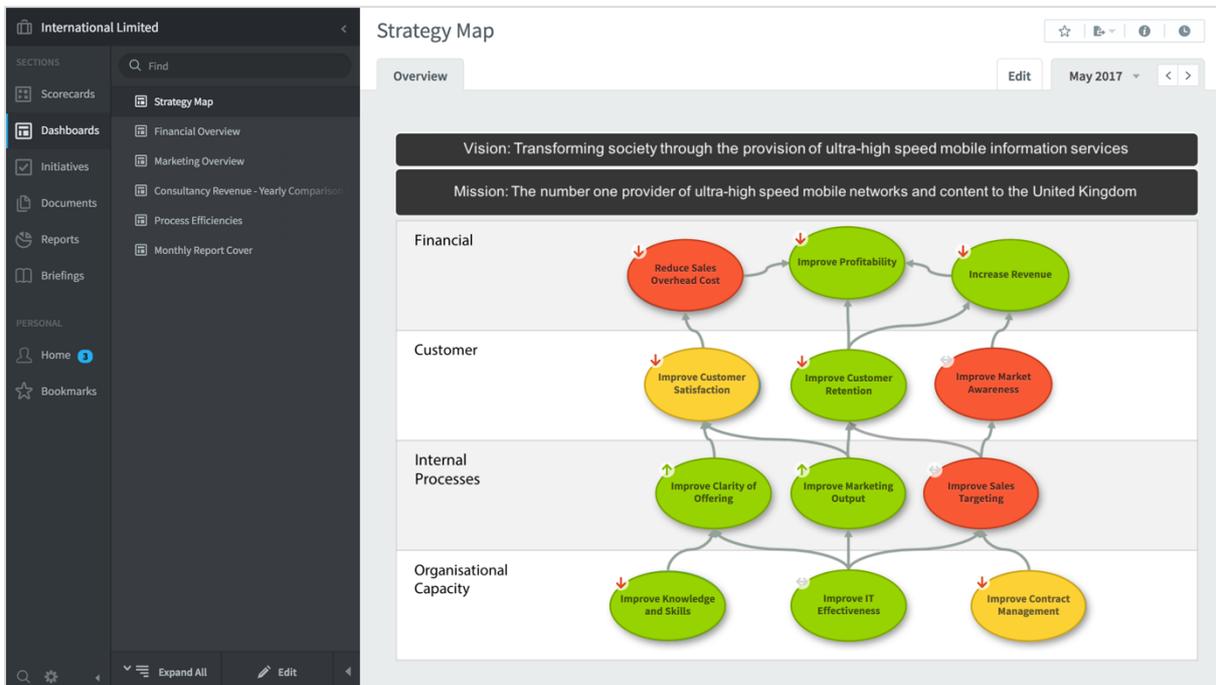
	SCORE	WEIGHT
Financial	8.79	25%
Customer	5.46	25%
Internal Processes	3.46	25%
Organisational Capacity	7.31	25%

Item Name	Entity
Intrafocus	WWW.INTRAFOCUS.COM
Marketing Plan	INTERNATIONAL LIMITED
Strategy Map	INTERNATIONAL LIMITED

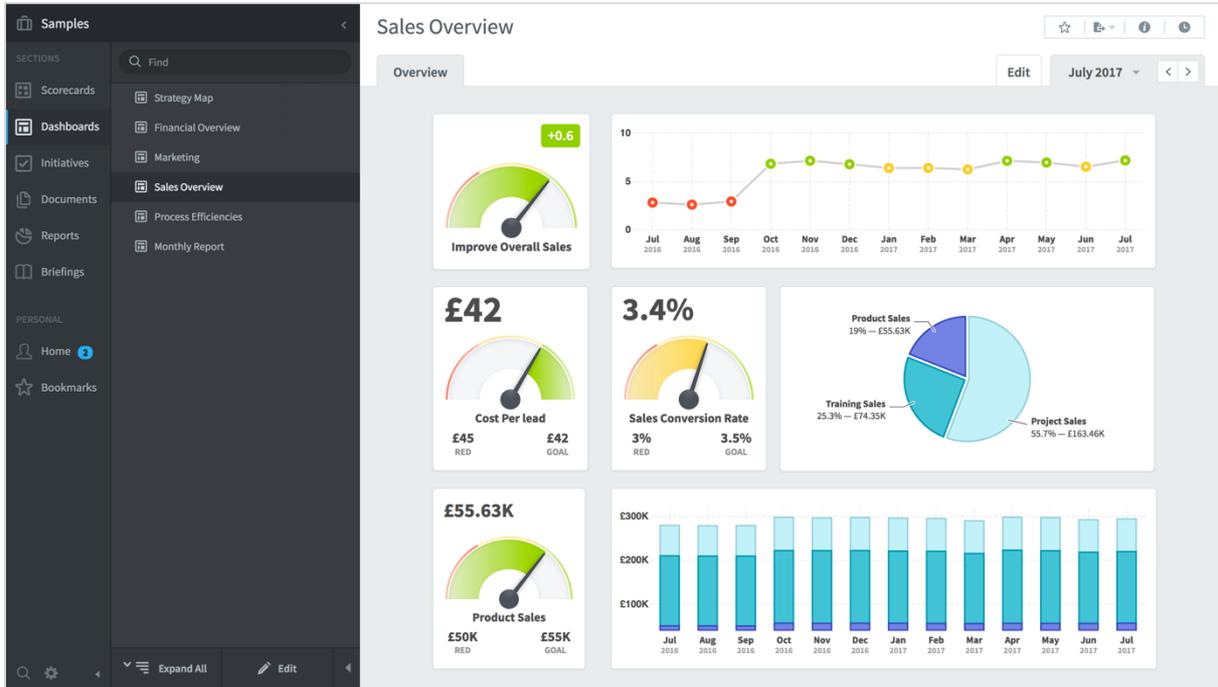
Performance Measure in Scorecards



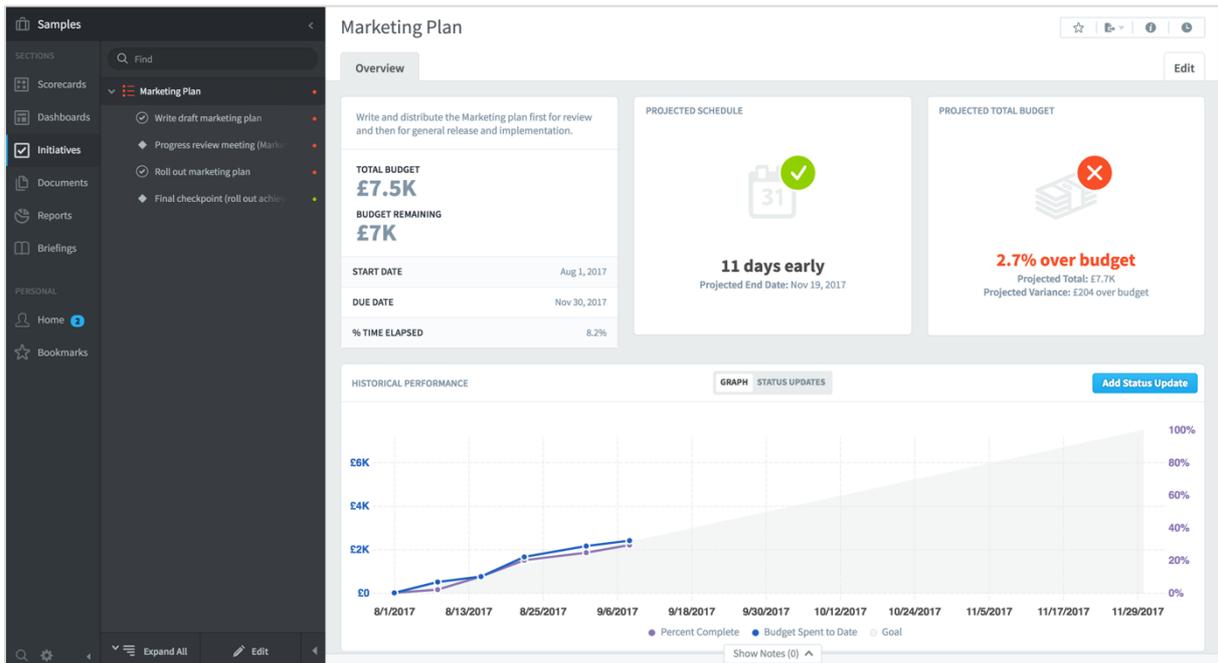
Strategy Map in Dashboards



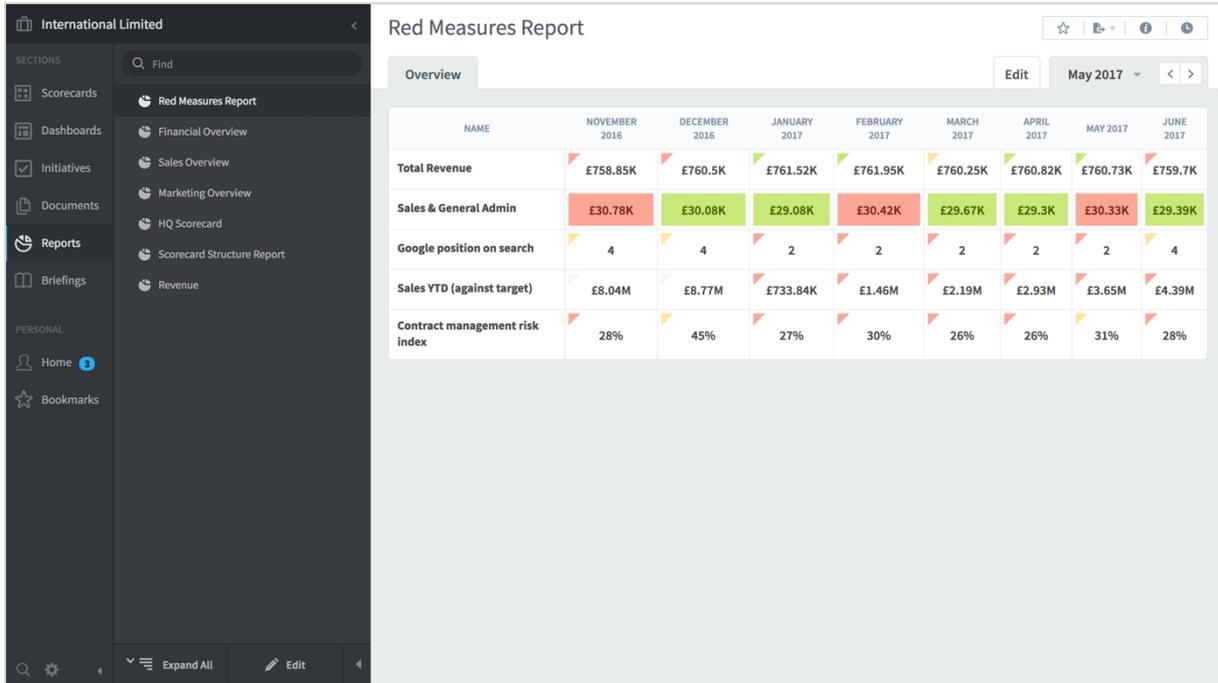
Sales Overview in Dashboards



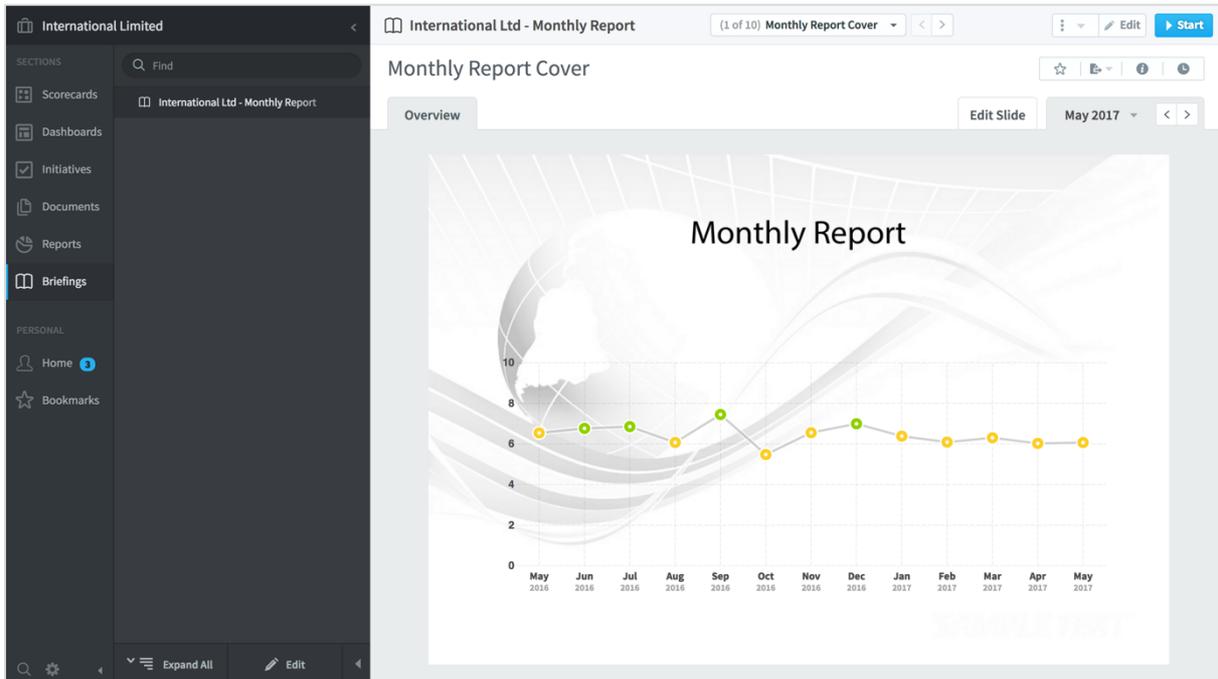
Marketing Plan in Initiatives



Red Metrics Report in Reports



Report Cover in Briefings



intra**focus**

