Administrator Training Module

Estimated Training Time: 12 Hours
Administrators are the highest level user on the InsightVision application and are responsible for adjusting the software settings and managing users. They require the most training and are often able to answer questions for new users while they are learning the application.

How to Use this Training Module

Click on the links below to watch online training videos and then click on the exercises to get on screen instructions to assist you in completing various exercises related to this role.

1. Videos to Watch (select the video from the page that loads)
   - Introduction to InsightVision
   - Additional Information Screens
   - Customizing your Homepage
   - Scorecard Builder Series Part 1: Prefixes and Scorecards
   - Scorecard Builder Series Part 2: Objectives and measures
   - Adding Actual Values (Entering Data into Measures)
   - Managing Users
   - Uploading and Linking Files and Images
   - Creating Strategy Maps

2. Exercises to Do (attached below)
   - View & Print the Scoreboard View
   - Add Featured Measures to Your Homepage
   - Add Featured Initiatives to Your Homepage
   - Building a Scorecard
   - View & Print the Measure-at-a-Glance View
   - View & Print the Objective Presentation View
   - Create a New User
   - Add Data Points to a Measure
   - Create a New Initiative
   - Create a New Task

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View & Print the Scoreboard View

Overview

The Scoreboard View is the main view in the InsightVision application. It presents Objectives and Measures sorted by perspectives on one screen in a hierarchical layout. The various columns present information on the current values of measures, their trend directions, and links to other information, comments, and Initiatives related to each. The Scoreboard View allows the user to look at the big picture while providing links to further analysis on each item.

Exercise

1. Login to your InsightVision Site
2. Select the **Scoreboard** menu item
3. Select a **Scorecard** from the drop-down
4. Click on the **Expand All** link.
5. Click on the **Print** button

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Add Featured Measures to Your Homepage

Overview

The InsightVision homepage allows for a high degree of customization to make using the software quicker and easier. Each user can set up what Measures appear on their homepage so they can quickly see the status of the metrics that they are responsible for reporting on and managing.

Exercise

1. Login to your InsightVision Site
2. Click on **Select** button next to Featured Measures on the homepage

    a. **Select**

3. Click the **checkbox** next to a measure you wish to add.

    a. Note - you can select more than one.

4. Click the **Select and Close** button

Add Featured Initiatives to Your Homepage

Overview

The InsightVision homepage makes using the software quicker and easier by allowing each user can add a customized list of Initiatives and Tasks to their homepage so they can easily monitor the status and details of those that they are involved in.

Exercise

1. Login to your InsightVision Site
2. Select the **Home** menu item
3. Scroll down to the **Featured Initiatives** Section
4. Click on the **Select** button.
   a. **Select**
5. Select each Initiative that you want to add by clicking the box next to its name.
6. Click on the **Select and Close** button

Building a Scorecard

Overview

The InsightVision software is designed around the presentation of data using scorecards. In this exercise we will walk through the steps required to create and link all the scorecard elements (listed below). In this example we will use the example of a generic company that is monitoring customer satisfaction.

Scorecard Elements include:

Prefixes – A prefix is a set of letters/numbers that precedes each scorecard element and allows the user to keep a large number of pieces organized and connected to the scorecard they display on.

Scorecards – A scorecard is the "canvas" on which all the other elements are listed.

Objectives – Objectives are the goals that your organization wishes to attain. These are often found on your organization's Strategy Map if using the Balanced Scorecard methodology.

Measures – Measures are data driven indicators of how well you are reaching your Objectives and are listed under Objectives on the scorecard.

Note – This exercise correlates to the Scorecard Builder Series that you should watch before continuing.

Exercise

5. Login to your InsightVision Site then continue to the next section

Note – The following scorecard elements should be added in the order listed below when you first create a scorecard, since some elements require others to be created first for proper linkages. However, a scorecard does not require all of the following elements to work. (i.e. you may have a scorecard that only displays Objectives and has no Measures or Initiatives.)

1. Prefix

6. Select the **Scorecard Builder** menu item
7. Select **Prefixes**
8. Select **Add New**
9. Enter the name **Corp** which will stand for Corporate level
10. Select **Save**

2. Scorecard

1. Select the **Scorecard Builder** menu item
2. Select **Scorecards**
3. Select **Add New**
4. Enter the name **Widgets, LLC**
5. Select **Save**
    a. Other settings are optional and are covered in more depth in the full documentation and the Scorecard Builder series videos

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3. Objectives

1. Select the **Scorecard Builder** menu item
2. Select **Objectives**
3. Select **Add New**
4. Enter the name **Customers Love our Products**
5. Select the **Corp** prefix from the drop-down
6. Select **Browse** to add a picture for this Objective
7. Click on the **Objective Images** folder and click **Insert** when you have selected the image you would like to add.
8. You may optionally want to fill out the Description and From-To Gap text boxes for your own Objectives to give your users more information to support their decisions
9. Select **Save**
   a. Other settings are optional and are covered in more depth in the full documentation and the Scorecard Builder series videos

6. Measures

1. Select the **Scorecard Builder** menu item
2. Select **Measures**
3. Select **Add New**
4. Enter the name **Customer Satisfaction %**
5. Select the **Corp** prefix from the drop-down
6. Select **Quarter** as the **Time Period Type**
7. Select **Percent 0 Decimal** for the **Unit of Measure**
8. Select **Higher is Better** for the **Polarity**
9. Click the **Select** button in the bottom right corner to add this Measure to the Objective we created
   a.
10. Check the box next to the **Customers Love our Products** Objective we created and click the **Select and Close** button
11. Select **Save**
    a. Other settings are optional and are covered in more depth in the full documentation and the Scorecard Builder series videos

6. Placing the elements on the Scorecard

1. Select the **Scorecard Builder** menu item
2. Select **Scorecards**
3. Click the **Widgets, LLC** scorecard name to edit it
4. Select the **Objectives (#)** tab
5. Click on the **Select** button
6. Check the box next to the **Customers Love our Products** Objective
7. Click **Save and Close**
8. Click **Save**

View your Scorecard

1. Select **Scoreboard** from the main menu
2. From the dropdown, select the **Widgets, LLC** Scorecard

View & Print the Measure-at-a-Glance View

Overview

The Measure-at-a-Glance screen is one of the key informational tools that the InsightVision application utilizes. It provides accountability and analysis of a chosen Measure. By printing and sharing the information displayed on the Measure-at-a-Glance screen you can easily engage and educate others on the current situation.

Exercise

1. Login to your InsightVision site
2. Select the **Scoreboard** menu item
3. Select a Scorecard from the drop-down
4. Click on the **trend arrow** next to the Measure or click on the **Yellow Measure Icon** on the left
5. Click on the **Print** button

*Note - Anywhere that a trend arrow appears in the software, clicking on it will open the Measure-at-a-Glance Screen. This includes the featured Measures on your homepage and the Objective View on the scoreboard

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View & Print the Objective Presentation View

Overview

The Objective Presentation View gives a brief, yet detailed, status report of a particular Objective. It lists out any Measures that are connected to the particular Objective in tablet view for a quick analysis of the trends. There is also a tabbed section for entering text about the Objective's purpose and its desired outcomes.

Exercise

1. Login to your InsightVision site
2. Select the **Scoreboard** menu item
3. Select a **Scorecard** from the drop-down
4. Click on the **Objective's Name** or the **Blue Objective Icon** to open the Objective Presentation view pop-up
5. Click on the **Print** button

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Create a New User

Overview

This exercise will illustrate how to create a new user for your site. Users can only be added and edited by Administrator accounts. By giving a user the security privilege of "Administrator", you give them access to edit other users' accounts.

NOTE – By clicking the "Save" button you will be sending an email to the email address you entered for the user with account information. We recommend that you do not actually save the user while creating them for training purposes.

Exercise

1. Login to your InsightVision Site
2. Select the **Administrator** menu item.
3. Select **Users** from the drop-down menu.
4. Click on the **Add New** button.
5. On the General tab, enter the user's **first name**, **last name**, and **email address** in the labeled boxes.
6. Click on the **Roles** tab.
7. Click on the **Select Roles** drop-down box and select the new user's role.
    a. 4 primary roles will display first. Once you select a primary role, additional "secondary roles" or permissions may appear for this user.
8. Click on the **Scorecards** tab.
    a. Note – this tab will not appear if the new user is an administrator since they automatically get access to all scorecards.
9. Click on the **Select Scorecards** drop-down box and select each scorecard that the new user is allowed to access.
10. Click on the **Add to list** button.
11. Click on the **Save** button. **(Do not actually click for training purposes)**

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Add Data Points to a Measure

Overview

This exercise will illustrate how to add data to a Measure. For convenience, there are a number of ways to enter Measure data into the system. Two of which are demonstrated here:

A.) from the Scoreboard

B.) from the Scorecard Builder.

Exercise 9a.

11. Login to your InsightVision Site
12. Select the **Scoreboard** menu item
13. Click on the **Edit Mode** Button
14. Click on the **Actions** button next to the Measure you want to add data to
15. Select **Add Data Values**
16. Click on the **Select Time Period** drop-down box and select the time period for your data value.
17. Click on the **Target Value** box and enter the target data.
18. Click on the **Actual Value** box and enter the actual value data.
19. Click the **Save** button.

Exercise 9b.

1. Login to your InsightVision Site
2. Select the **Scoreboard Builder** menu item
3. Select **Measures**
4. Click on the Measure name that you want to add data to.
5. On the edit screen, Select the **Data Values** tab.
6. In the data values section, click on the **Add New** button.
7. Click on the **Select Time Period** drop-down box and select the time period for your data value.
8. Click on the **Target Value** box and enter the target data.
9. Click on the **Actual Value** box and enter the actual value data.
10. Click the **Add** button
11. Click the **Save** button.

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Create a New Initiative

Overview

InsightVision allows for the linking of initiatives to Measures. Initiatives and tasks can be used to display the status of work that is being done to improve Measures and execute your strategy. Initiatives have many different fields that allow users to enter information that can later be displayed on the scoreboard.

Exercise

1. Login to your InsightVision Site
2. Select the **Scorecard Builder** menu item.
3. Select **Initiatives** from the drop-down menu.
4. Click on the **Add New** button.
5. On the General tab, click on the **Name** box and enter the Initiative's name.
6. Click on the drop down boxes to select the appropriate prefix, parent Initiative, status, and color for the Initiative if applicable.
7. Click on the **Description** box and enter a description of the Initiative.
8. Click on the **Percent Complete box** and enter the value.
9. Click on the **Save** button

Optional Steps

10. Click on the **Advanced** tab.
11. Use the **Assigned to** drop-down menu to assign the Initiative to a user.
12. Enter the start date and end date for the Initiative in the appropriate boxes if applicable.
13. Select the **Tasks** tab and click on the **Select** button. (Note: Tasks need to be created in advance)
14. Select all of the tasks associated with the Initiative, then click on the **Save and Close** button.
15. Select the **Sub Initiatives** tab and click on the **Select** button.
16. Select all the sub Initiatives associated with the Initiative, then click on the **Save and Close** button.
17. Select the **Associated Measure** tab and click on the **Select** button.
18. Select all of the measures associated with the Initiative, then click on the **Save and Close** button.
19. Select the **User Defined Fields** tab.
20. Enter Budget, Spent to Date, and Remaining to complete values in the appropriate boxes.
21. Select the **Associated Files** tab.
22. Click on the Select button and select a file to associate with the Initiative.
23. Click on the **Save** button.

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Create a New Task

Overview

Tasks, like Initiatives allow users to track the status of tasks that are being worked on in order to improve Measures, Objectives, and your Strategy as a whole. Tasks are a second level and have "parent" Initiatives and are therefore usually smaller in scale than the initiatives they are under.

Exercise

1. Login to your InsightVision Site
2. Select the **Scorecard Builder** menu item.
3. Select **Tasks** from the drop-down menu.
4. Click on the **Add New** button.
5. On the General tab, click on the **Name** box and enter the task's name.
6. Click on the **Initiative** box and select an Initiative from the drop-down menu to associate the task to.
7. Click on the **Sub Initiative** box and select a sub Initiative from the drop-down menu to associate the task to.
8. Click on the **Initiative** box and select an Initiative from the drop-down menu to associate the task to.
9. Click on the **Status** box and select the status of the Initiative from the drop-down menu.
10. Click on the **Color** box and select the highlight color for the task.
11. Click on the **Description** box and enter a description of the task.
12. Click on the **Percent Complete box** and enter the value.
13. Click on the **Save** button.

Optional Steps

14. Click on the **Advanced** tab.
15. Use the **Assigned to** drop-down menu to assign the task to a user.
16. Use the **Assigned by** drop-down menu to change the person who assigned the task.
17. To add a link to a charter document, click the **Browse** button and select the document from the list.
18. Enter the start date, end date, and PM task number in the labeled boxes if applicable.
19. Select the **Associated Files** tab.
20. Click on the Select button and select a file to associate with the task.
21. Click on the **Save** button.

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