Administration User Guide

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Welcome InsightVision 2.0™ Administrator!
Please make sure you have read the Getting Started, Presenter, and Scorecard Builder User Guides. Then, read this Administration User Guide and refer to it when using the InsightVision Administration module.

User Guide Set

The InsightVision 2.0 User Guide set includes the following user guides:

Getting Started User Guide	All users should read this user guide carefully before using the application. It contains general information and procedures for using the application and the other user guides in the series.
Scorecard Builder User Guide	All users designated as Scorecard Builders or Administrators should read this manual after reading the Getting Started User Guide and the Presenter User Guide.It contains information and procedures for maintaining performance management records and data used in the application.
Administration User Guide	All users designated as Administrators should read this user guide after reading the Getting Started User Guide, Presenter User Guide, and Scorecard Builder User Guide. It contains information and procedures for maintaining user records and default settings for the application.

Additional Help Resources

Support by e-mail: support@insightformation.com

InsightVision Training Center (videos) — http://training.insightformation.com

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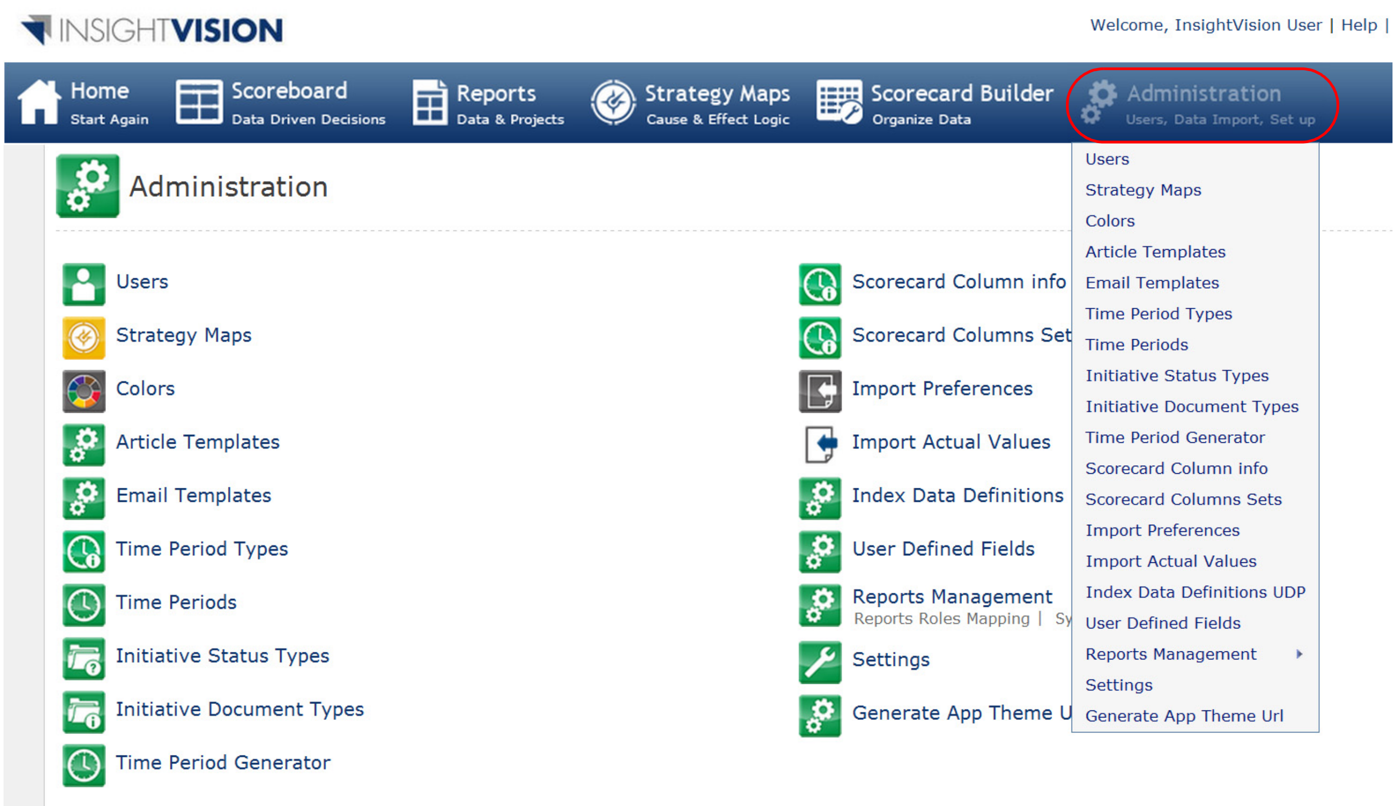
Chapter 1: Administration Overview

Introduction

The Administration module contains the functions for setting up the application and customizing it to meet individual organizational requirements. The module includes many functions for customizing the appearance and behavior of pages and fields within the application, such as setting page sizes, identifying default fields, designing custom colors, creating templates, setting up time periods for data reporting, maintaining User records and security permissions (roles), and much more.



This Administration User Guide describes the functions in the Administration module. The User Guide is for users assigned the role of Administrator. These users have access to the all of the functions in the application, including the Administration module functions (described on the next page).

NOTE: *Although the Administration module is the first module you will use, review the other User Guides in the set so that you are familiar with all the functions in the application before you begin using the Administration module and this user guide.*

The Administration module includes the following functions:

- **Users —** add and maintain User records, including names, e-mail addresses, activity status (active or inactive), roles (permissions), Scorecard access, reset User passwords. See Chapter 2: Users on page 3.
- **Strategy Maps** – lists strategy maps with to add, edit or delete the strategy map record and associated strategy map file. An Administrator can also view or delete the associated scorecards for each strategy map.
- **Colors —** define colors to be used for color-coding Measure data values, Initiatives, and tasks. See Chapter 3: Color Codes on page 15.
- **Article Templates —** compose and maintain reusable HTML content as “articles” for use in the Home page Article area. See Chapter 4: Article Templates on page 27.
- **E-mail Templates —** edit e-mail messages that are sent automatically to Users from the InsightVision application See Chapter 5: E-Mail Templates on page 35.
- **Time Period Types —** add and edit time period types (yearly, weekly, daily) that are used for entering and monitoring Measure data values. See Time Period Types on page 41.
- **Time Periods —** enter and edit individual time periods, one at a time, for a time period type, including names, beginning dates, and ending dates for time periods that occur within a time period type. See Chapter 7: Time Periods on page 49
- **Time Period Generator —** add a time period type and enter multiple time periods for the time period type or enter multiple time periods for an existing time period type. See Chapter 8: Time Period Generator on page 59
- **Initiative Status Types —** add and edit names of statuses that are assigned to Initiatives and tasks and used as a method of reporting progress. See Chapter 9: Initiative (and Task) Status Types on page 61.
- **Initiative Document Types —** add and edit names of document types that are used to identify files that are associated with Initiatives and tasks. See Chapter 10: Initiative (and Task) Document Types on page 69
- **Scorecard Column Info (Information) —** edit the names of columns that may appear on the Scoreboard. See Chapter 12: Scorecard Column Information on page 85.
- **Scorecard Column Sets —** add and edit column sets and specify columns that will appear when the column set to customize different scorecard column sets to change what columns display on the scoreboard. See Chapter 13: Scorecard Column Sets on page 93.
- **Import Preferences —** customize what actions are taken as data values are imported into the InsightVision application. See Chapter 14: Data Values Import on page 103
- **Import Actual Values —** upload CSV files with data values for entering data into Measures. See Chapter 14: Data Values Import on page 103.
- **Index Data definitions** – view or delete existing indexes or add a customized index to the application. If the client desires to add a customized index to the application, please contact Insightformation for a quote.
- **User-Defined Fields —** add and edit customized fields that are used for Initiative records. See Chapter 11: Initiative User-Defined Fields on page 77.
- **Reports Management** – install predefined and customized reports to the application and assigns user access by roles to these respective reports. If the client desires to add a customized report to the application, please contact Insightformation for a quote
- **Settings —** customize the default behavior and appearance of pages, fields, and other features of the application by maintaining over 150 settings.

Chapter 2: Users

Introduction

User records are used in the InsightVision application to control access to the application and its functions. A User record is set up for each person (user) who is allowed access to the application. The User record identifies the User with a username and password. The User then uses the username and password to access ("Log in" to) the application. User records also control user access to specific modules and functions within the application by assignment of a primary Role to each User record.

This chapter includes the following sections for maintaining User records in the InsightVision application.

User Roles Overview

User roles are security levels assigned to User records. The role(s) assigned to a User determine which modules and functions the user can access. Therefore, options available on the Menu bar and actions available on pages within the application vary for each user based on the role(s) assigned to that user.

There are four primary user roles:

- **Administrator** — Allows complete access to software with special privileges.
- **Scorecard Builder** — Power users who can create, edit and change scorecards or add data.
- **Presenter** — Typical users who can view software and add comments.
- **Read-Only Presenter** — Limited users who can view software without making comments or changes.

In addition to a primary role, a user may also be assigned one or more secondary roles, which grant a user access to specific functions. There are three secondary user roles:

- **Journalist** — Allows editing of the Home Page article section (grants user access if not already an administrator).
- **Allow File Upload** — Allows uploading documents, reports, images and other supporting files to be used by the InsightVision application (grants user access if not already a scorecard builder or administrator).
- A**ctual Value Approver** — Grants rights to approve actual values prior to being visible to others if they are not set to Auto-Approve (grants user access if not already an administrator).

For some users, User records control permissions for viewing and data maintenance of other records in the application by assignment of Measures to maintain and on the basis of Scorecard assignment for viewing items on the Scoreboard.

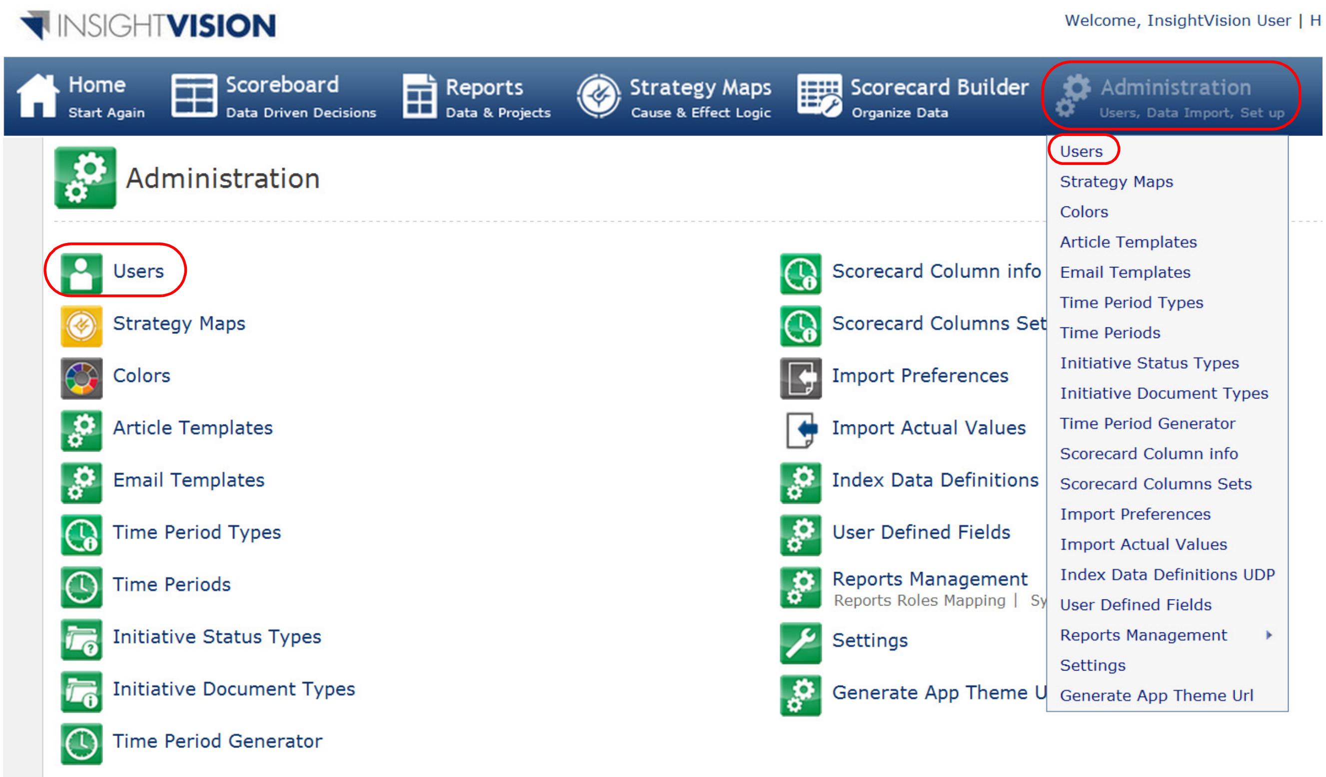
View the Users List

Purpose

Use the steps in this section to view the User records set up in the InsightVision application.

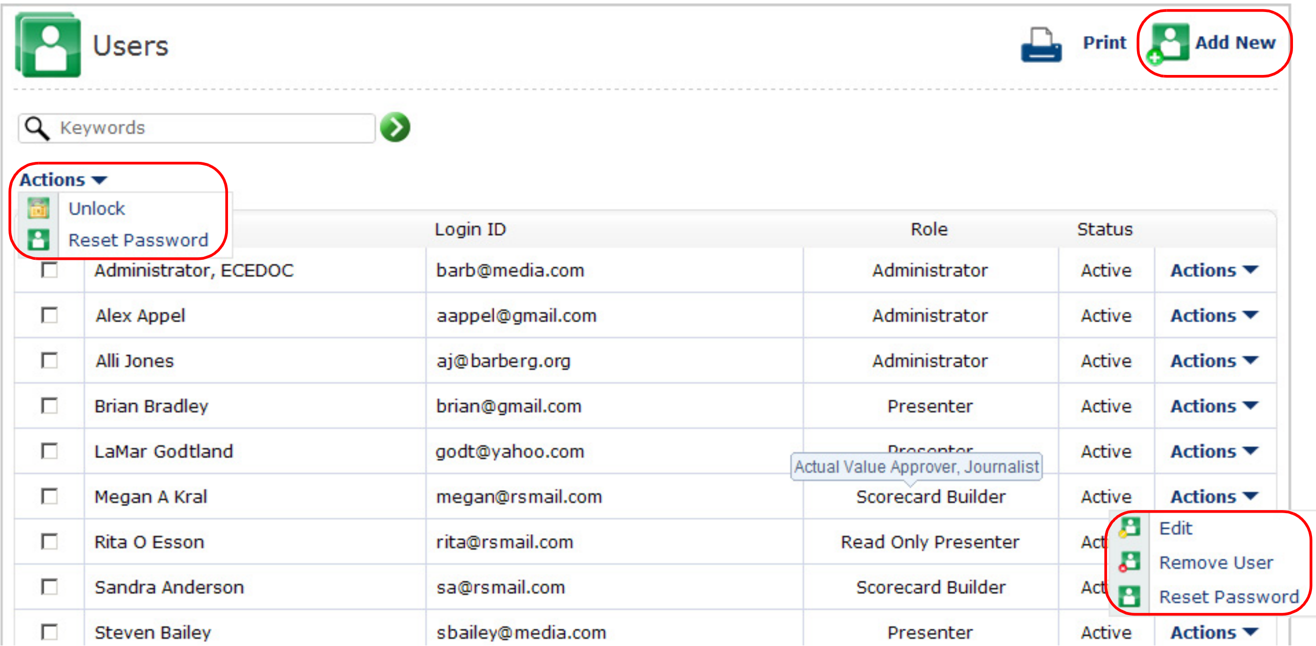
STEPS

Administration Menu



1. From the Menu bar, select the **Administration** menu, **Users** command.
   This displays the Users page.

Users Page



2. Notice the following about the Users page:

- The Role column shows the primary role, Tool tip on mouse over is the secondary role(s).
- The actions available on the page are Print, Add New, Edit, Remove User, Reset Password, and Unlock.

3. Do any of the following:

- To print a list of the records, click the **Print** link.
- To add a new record, click the **Add New** link. See *Add a New User Record* on page 6.
- To view or edit the details for a record, click the **name** of the User or select the row **Actions** menu, **Edit** command for the User record to view or edit. See *Edit a User Record* on page 11.
- To remove application access from a user, select the row **Actions** menu, **Remove User** command for the User record to remove. See *Remove a User Record* on page 13.
- To change the password for one or more users, use the **Actions** menus, **Reset Password** commands. See *Change a User Password* on page 14
- To unlock one or more locked User records, use the **Actions** menus, **Unlock** commands.
- To close the record list page, select a different command from the Menu bar.

Add a New User Record

Purpose

Use the steps in this section to set up new User records in the InsightVision application.

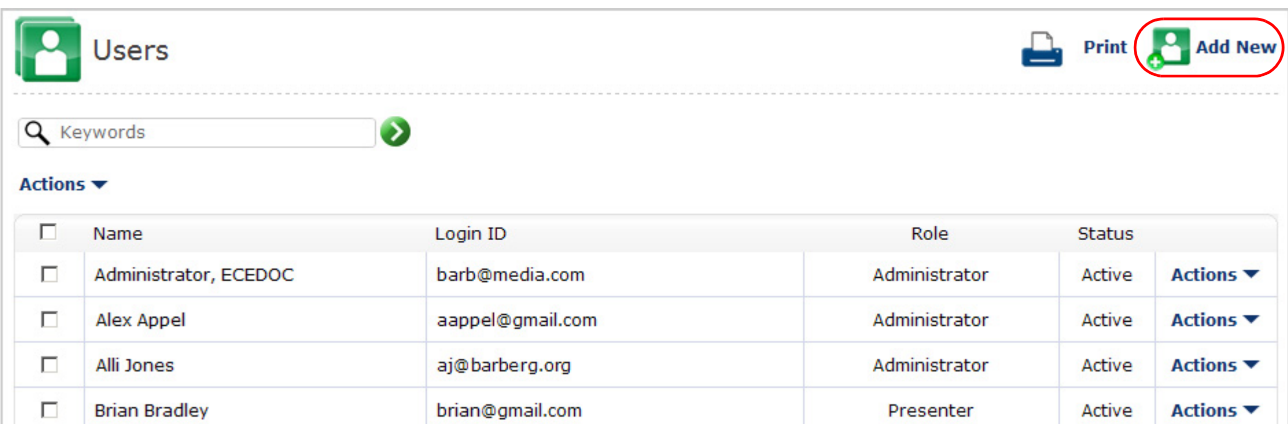
NOTES

- When you first receive the application, there is one User record already set up as an Administrator. Set up additional Administrators, then set up the application and add other users as necessary.

STEPS

1. From the Menu bar, select the **Administration** menu, **Users** command. This displays the Users page.

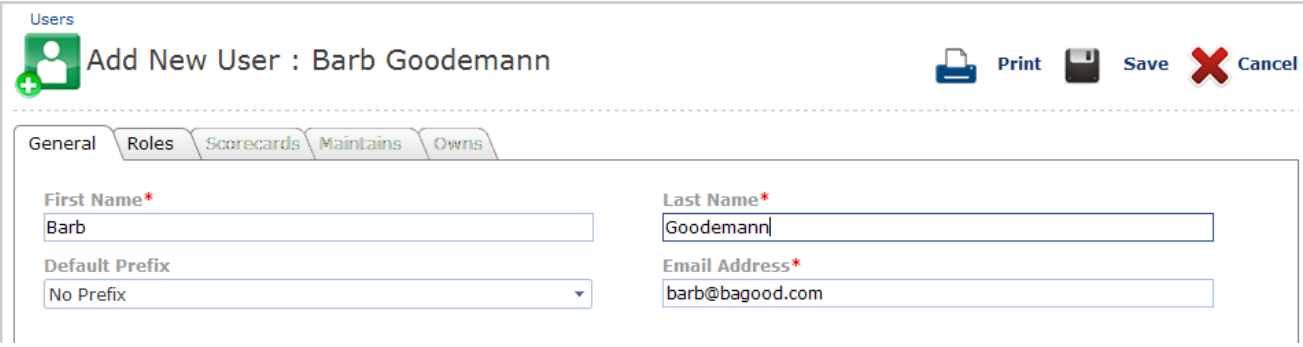
Users Page



NOTE: *For more information about the Users page, see View the Users List on page 4.*

2. Click the **Add New** link. This displays the Add New User page.

Add New User Page, General Tab

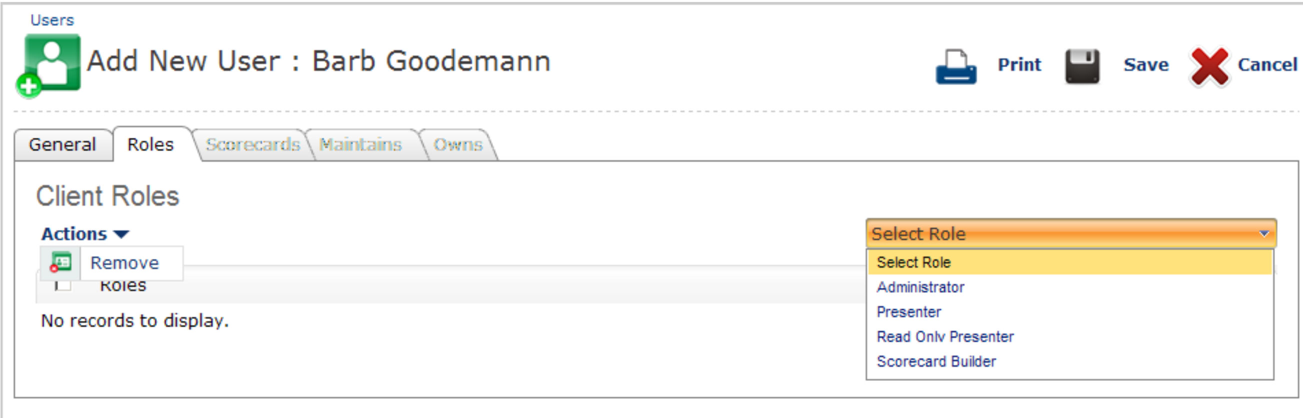


3. Complete the following fields on the General tabbed page:

First Name	Type first name of the new user.
Last Name	Type the last name of the new user.
Default Prefix	Selecting a default Prefix for a user will automatically add that prefix as the prefix for each Objective and Measure they create to make creating records easier. It is useful if a user is creating many Objectives or Measures that have the same prefix. This default can be changed at any time.
Email Address	Type the e-mail address for the new user. ***NOTE:*** *This is the e-mail address that the User will enter as a Username to log into the application and the e-mail address to which the application sends all automatically-generated messages, such as a Welcome e-mail message and password reset messages.*

4. Click the **Roles** tab.

Add New User Page, Roles Tab



5. Notice the following about the Roles tabbed page:

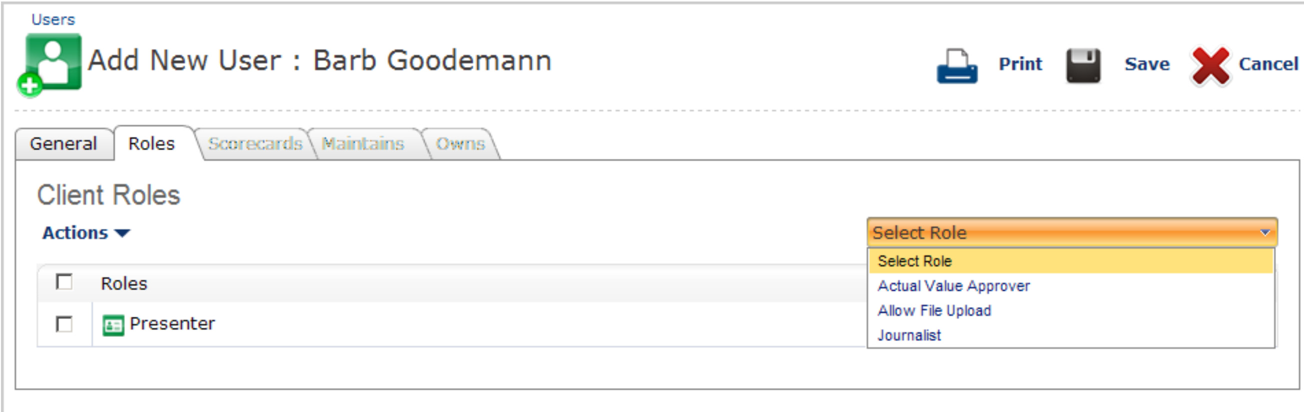
- The actions available on the page are Select Role and Remove.
- The list displays no records until you select and assign one or more roles to the User record.
- The values available for selection in the Select Role field vary based on the role(s) already assigned to the User record as follows:
  - » If no roles are assigned to the User record, the available values are the primary roles of Administrator, Presenter, Read-Only Presenter, and Scorecard Builder. Only one primary role can be assigned to a User record.
  - » If a primary role is assigned to the User record, the available values are secondary user roles, which vary based on the primary role assigned as shown in the following table:

Primary Role Assigned	Secondary Roles Available
Administrator	Actual Value Approver
Presenter	Actual Value Approver, Allow File Upload, Journalist
Read-Only Presenter	None (Read-Only Presenter role is not allowed secondary roles)
Scorecard Builder	Actual Value Approver, Journalist

6. Assign a primary role to the User record as follows:

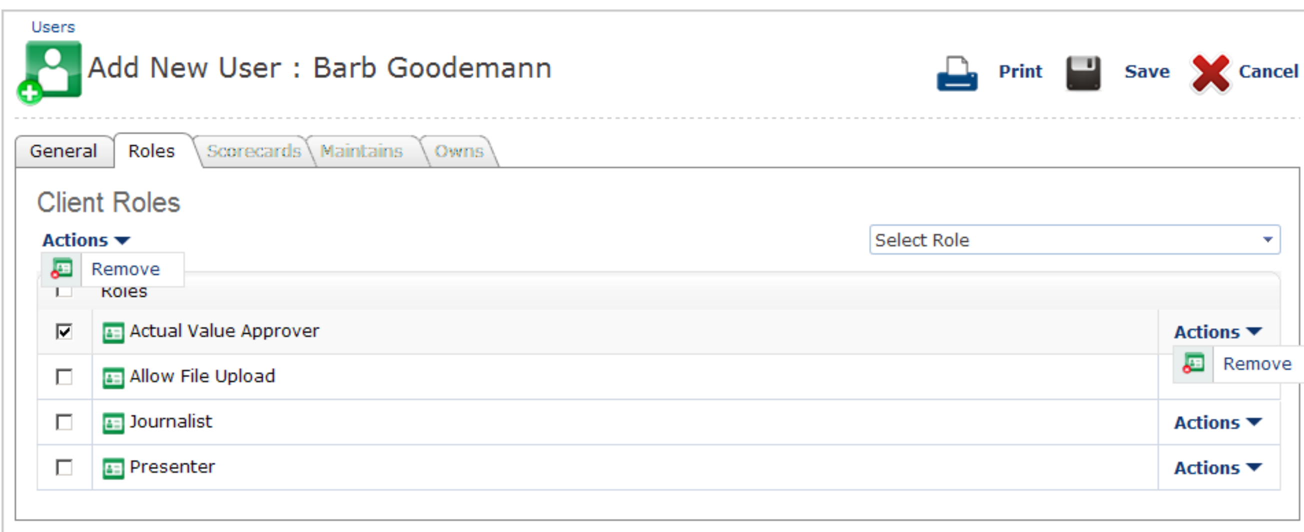
a. In the Select Roles field, select one of the following primary roles:

- Administrator — has access to all modules, functions, and records in the application, except they cannot delete User records that are assigned the role of Administrator.
- Scorecard Builder — has access to the Home page, Scoreboard, Reports, and Scorecard Builder modules of the application and to all functions within these modules. They have limited access to records in the application based on Scorecard record assignments,
- Presenter — has access to the Home page, Scoreboard, and Reports modules of the application and all functions within these modules. They have limited access to records in the application based on scorecard assignment.
- Read-Only Presenter — Limited users who can view software without making comments.



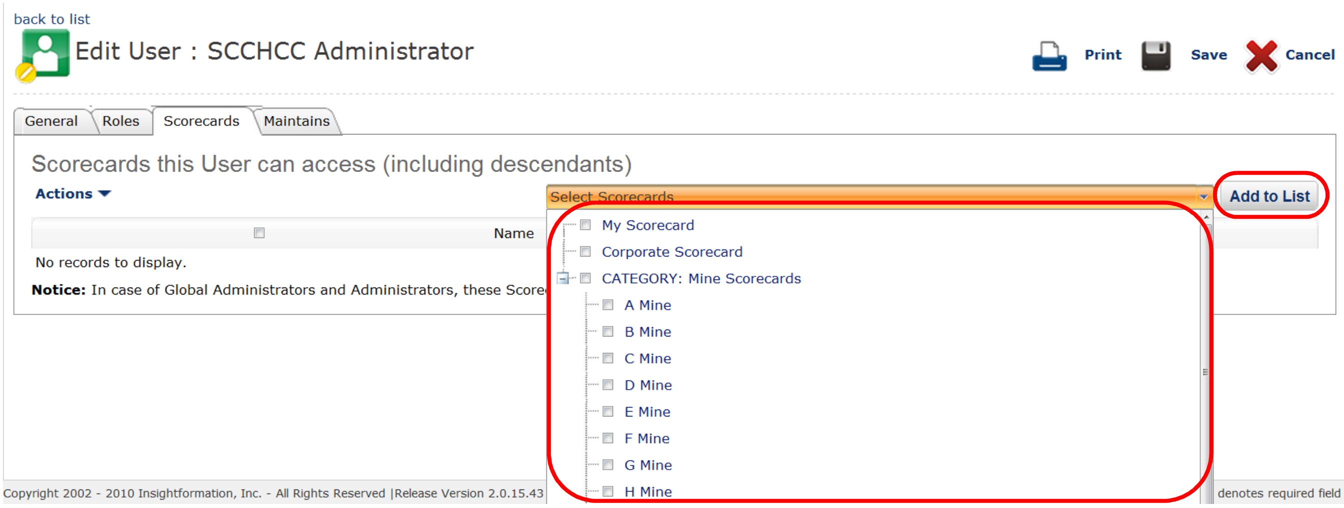
7. If you assigned the Scorecard Builder, Administrator, or Presenter role as the primary role, optionally assign one or more secondary roles to the User record as follows:
   a. In the Select Roles field, select any of the following secondary roles:
      - Journalist — Allows editing of the Home Page article section.
      - Actual Value Approver — Grants rights to approve actual values prior to being visible to others if they are not set to Auto-Approve.
      - Allow File Upload — Allows uploading documents, reports, images and other supporting files to be used by the InsightVision application.
   b. Repeat as necessary.

Add New User Page, Roles Tab



8. Recheck the list that only one primary role has been added and if there are any incorrect roles assigned, remove them with the **Actions**, **Remove**.

9. For Presenters, Scorecard Builders, and Read-Only Presenters select the **Scorecards** Tab.



- **a.** Click the **Select Scorecard down arrow** (at the right side of the Select Scorecard box) to display the hierarchy of scorecards that are published.
- **b.** If a scorecard is a parent scorecard, there is a plus (+) sign at the left side. Click the **plus (+)** icon to expand the list to display the child scorecards below the parent. To collapse the list, click the **minus (-)** icon to display only the parent scorecard again.
- **c.** You assign scorecards to users by selecting the checkbox at the left side of each scorecard to assign. If a user is assigned to a parent scorecard, they have access to all the descendents (child scorecards down multiple levels). There is no need to select the checkbox by a child scorecard.
- **d.** Click the **Add to list** button to assign the scorecards to the user and display them in the Scorecards list.
- **e.** To remove a scorecard from the list, click the **Actions down arrow** in the Actions column for the scorecard to remove and then select **Remove** from the menu that appears. To remove multiple scorecards at one time, select the checkboxes to the right of the scorecards you want to remove, and the use the **Actions drop down** in the upper left corner and select **Remove**.

10. To save the new User, click the **Save** link.

NOTE: *An invitation email will automatically be sent to the user informing them of their account and providing them with login details*

Edit a User Record

Purpose

Use this procedure to edit user information and security access.

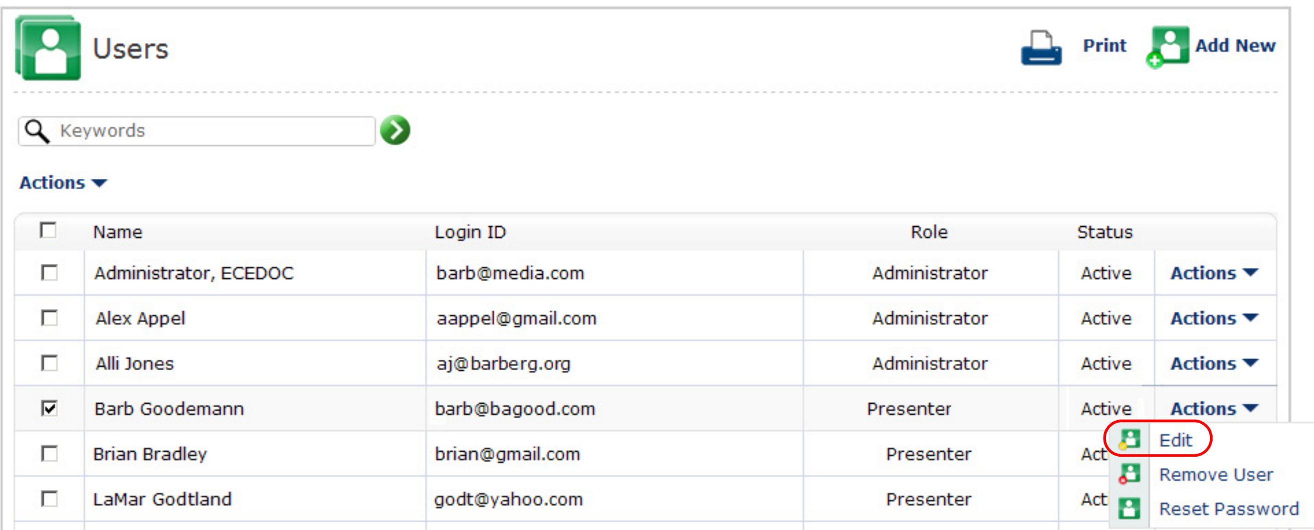
NOTES

- Email addresses cannot be changed once a user record is created since it is also their username. To change a user's email account, create a new account and remove the old one.
- To change a user's password see *Change a User Password* on page 14

STEPS

1. From the Menu bar, select the **Administration** menu, **Users** command. This displays the Users page.

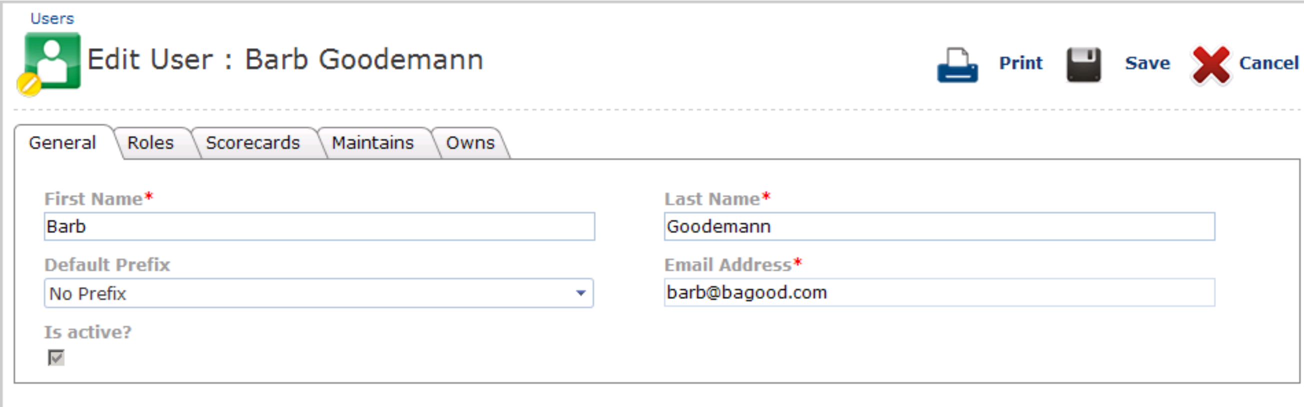
Users Page



NOTE: *For more information about the Users page, see View the Users List on page 4.*

2. Click the **name** of the user, click the E-mail address for the user, or select the row **Actions** menu, **Edit** command for the User record to edit. This displays the Edit User page.

Edit User Page, General Tab



3. If necessary, change the fields on the General tabbed page. (Otherwise, skip this step.)
4. Optionally, click the **Roles** tab to change the user role(s) assigned to the User record. (Otherwise, skip this step.)

Edit User Page, Roles Tab

5. Optionally, click the **Scorecards** tab to assign or remove assignment of Scorecard records for the user. (Otherwise, skip this step.)

   NOTE: *Scorecard assignment does not apply to Users with Administrator as the primary role; Administrators automatically have access to all Scorecard records.*

6. Use the **Maintains** tab to assign a user as a data maintainer who can add and edit actual values for specific Measures.

   NOTE: *This tab is only used to view which Measures the user is a maintainer for. The relationship is defined by editing the Measure.*

7. To view and assign ownership of Objectives and Measures to the user, click the **Owns** tab.
8. Optionally, use the **Print** link to print the information.
9. When you are finished, do one of the following
   - Click the **Save** link to save any information you changed and to return to the Users List page.
   - Click the **Cancel** link to close the record without saving your changes.

Remove a User Record

Purpose

Use the steps in this section to remove user access from the InsightVision application.

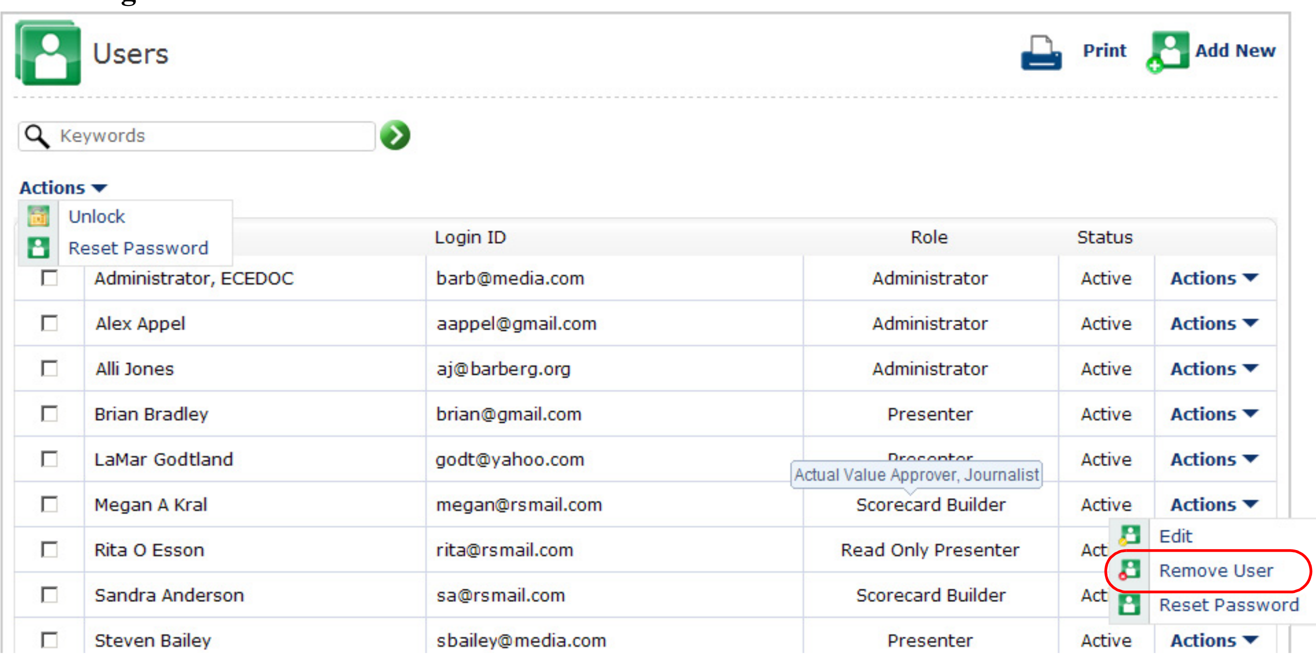
NOTES

- Removing a user from InsightVision does not permanently delete their account. Any records that they have ownership of will remain owned by them until those records are edited. Removing a user locks that user out of InsightVision until their roles and scorecards are re-assigned to them.

STEPS

1. From the Menu bar, select the **Administration** menu, **Users** command. This displays the Users page.

Users Page



2. Select the row **Actions** menu, **Remove User** command for the User to remove. This displays a confirmation message.
3. The user no longer appears in the record list.

NOTE: *To re-add a removed user, contact your InsightVision Account Representative.*

Change a User Password

Purpose

Use this procedure to change the password of a single user or a group of users.

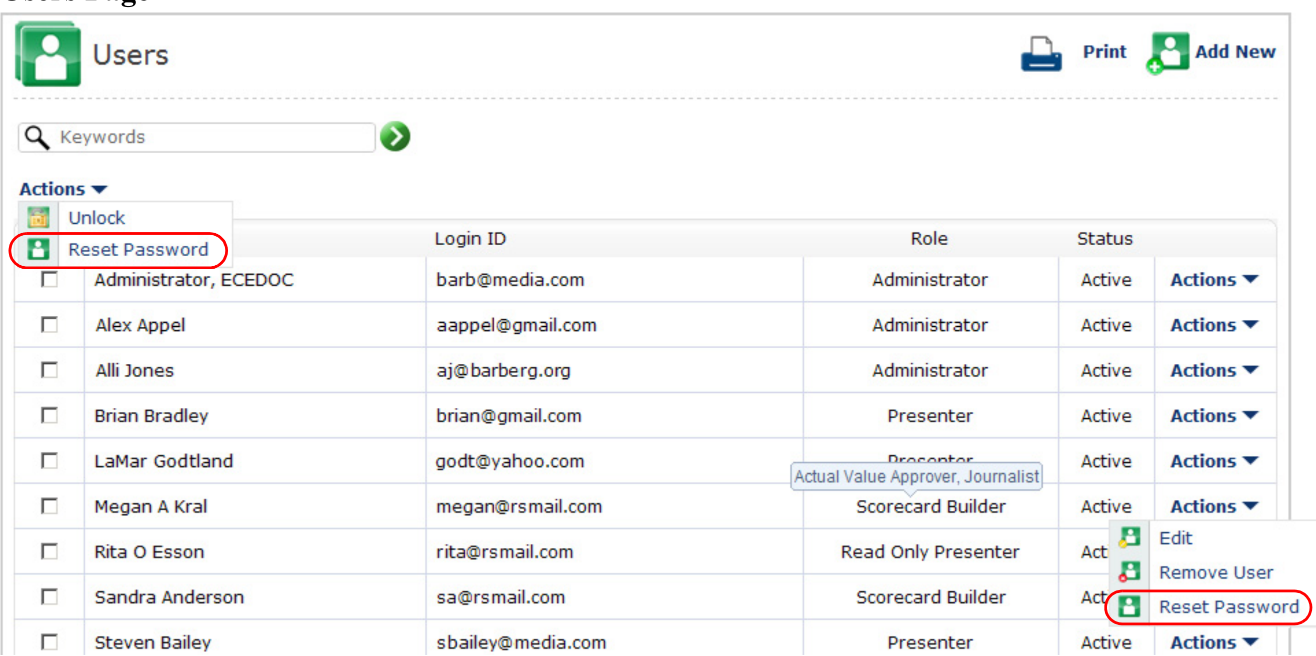
NOTES

- Changing a users password can be useful to help them login if they can't receive the invitation email for any reason.
- Changing a group of users' passwords can be useful when conducting training sessions with large numbers of users logging in at the same time. By giving them all the same password, the trainer can easily instruct them all to login with the same password.

PROCEDURE

1. From the Menu bar, select **Administration** menu, **Users command**.

Users Page



2. Click the **Reset Password** button on the group or row **Actions** Menu.
3. Enter a new password for the user
4. Click Ok

   NOTE: *A new password email is sent to the user.*

Chapter 3: Color Codes

Introduction

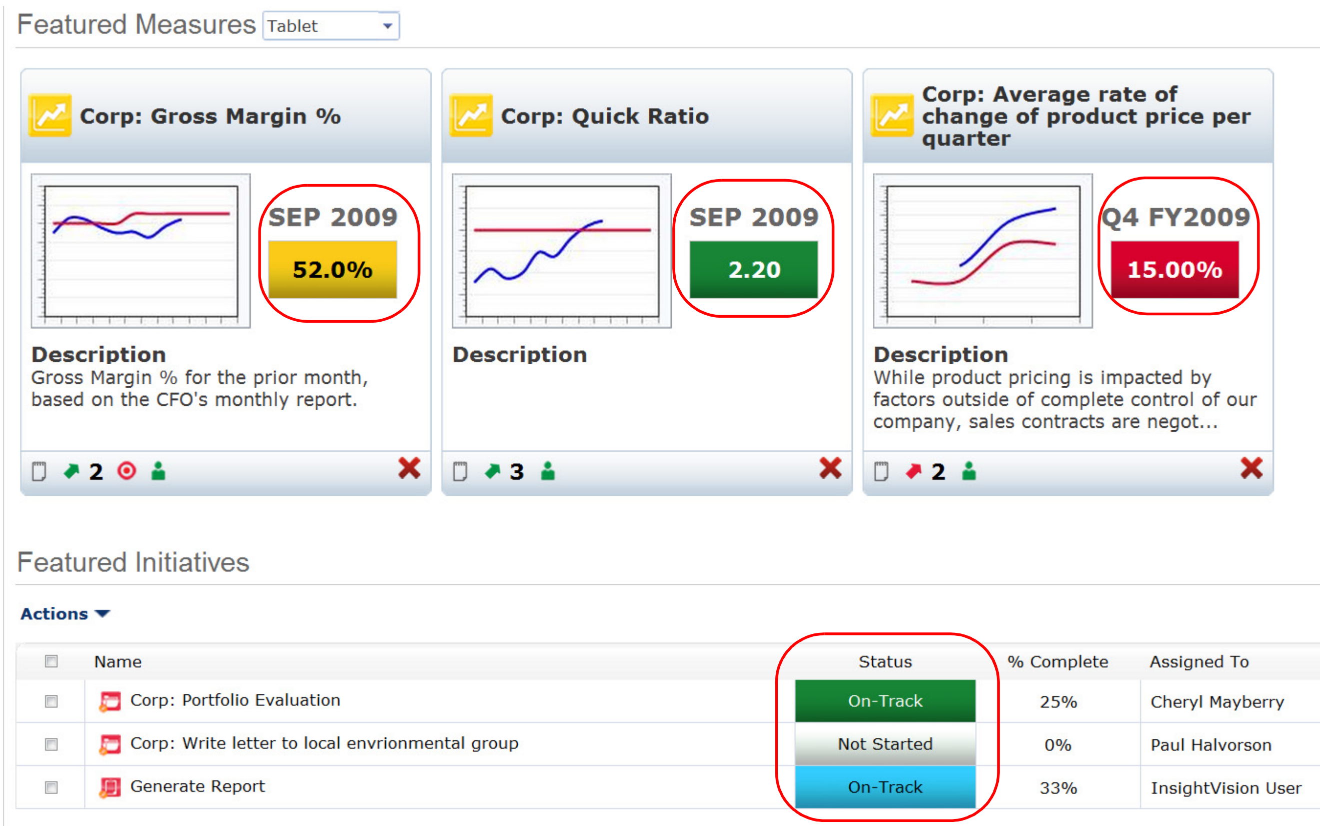
Administrators can define both the background color and the font colors used to indicate performance levels in the application. Colors may be changed for a variety of reasons—ranging from the way the colors look when projected on the screen in the executive conference room to how they print or preferences and business practices.

Color codes are used in the InsightVision application as a visual aid for quickly determining the status of Measures, Initiatives, and Tasks.

- For Measures, color codes are defined for different “Bands” of the Actual values. They can be calculated based on a percent of the target or be defined for specific ranges. Based on that logic, the color bands are applied by the application as Actual Values are entered.
- For Initiatives and Tasks, color codes can be manually assigned based on the type or progress (status) of the Initiative or Task.

The color codes appear as rectangles (bands) of color around data values and status codes when they display on the Home page (shown below), Scoreboard page, and in views and reports.

Home Page (Color Codes)



This chapter includes the following sections for maintaining Color codes in the InsightVision application.

- *View the Color Codes List* on page 16
- *Add a New Color Code* on page 18
- *Edit a Color Code* on page 24
- *Delete a Color Code* on page 25

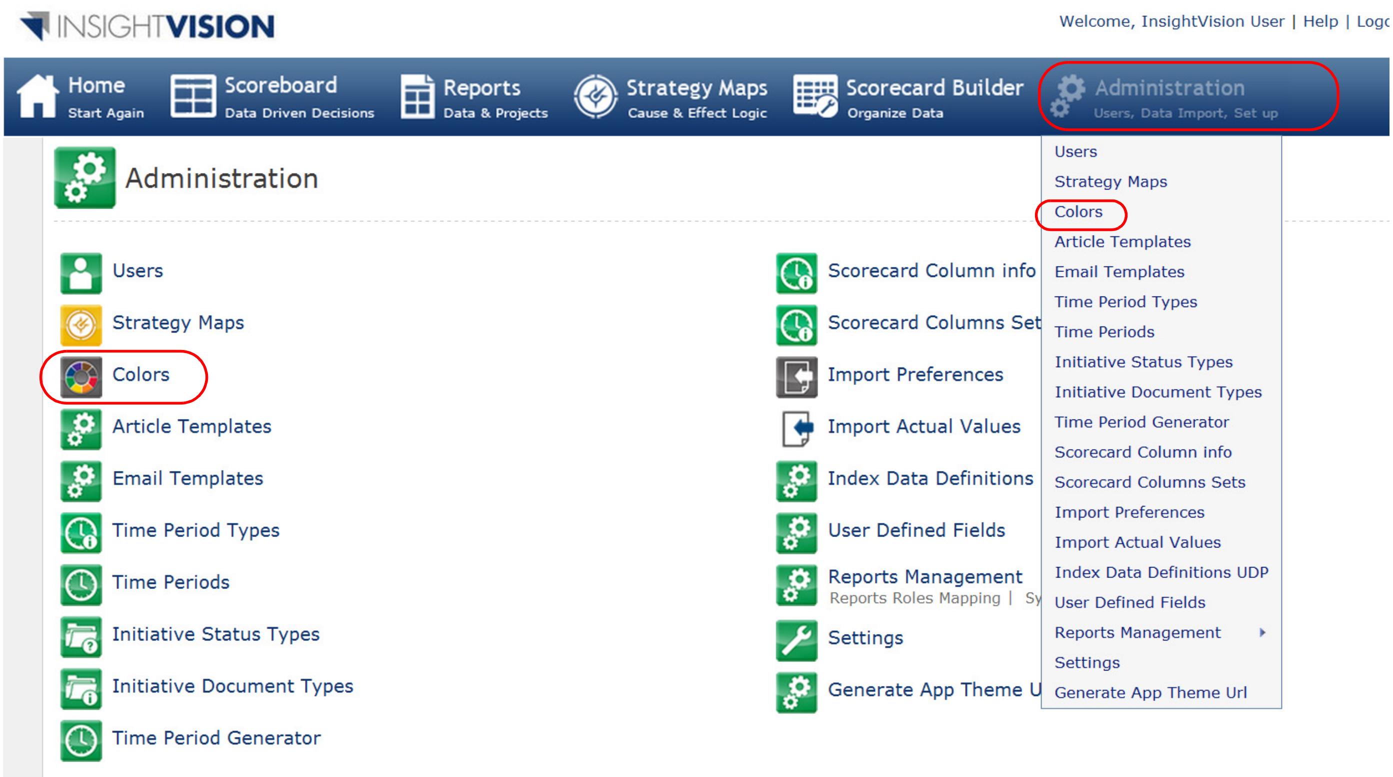
View the Color Codes List

Purpose

Use the steps in this section to view the color code records set up in the InsightVision application.

STEPS

Administration Menu



1. From the Menu bar, select the **Administration** menu, **Colors** command. This displays the Colors page.

Colors Page

2. Notice the following about the Colors page:

- The page lists the color code records set up in the application; the page has the basic features of a record list.
- The predefined records are: white, red, yellow, green, blue, grey, and pink.
- The actions available on the page are Add New, Edit, and Delete.

3. Do any of the following:

- To add a new record, click the **Add New** link. See *Add a New Color Code* on page 18.
- To view or edit the details for a record, click the **name** of the color or select the row **Actions** menu, **Edit** command for the color to view or edit. See *Edit a Color Code* on page 24.
- To delete a record, select the row **Actions** menu, **Delete** command for the record to delete. See *Delete a Color Code* on page 25.
- To close the record list page, select a different command from the Menu bar.

Add a New Color Code

Purpose

Use the steps in this section to set up new color code records in the InsightVision application.

NOTES

- Each color code consists of a background (band) color and a foreground text color.
- Before setting up color codes, determine a naming system for the codes (up to 20 characters for each code). The names could match the color names, describe each color code or its intended use, or follow some other system. For example, a name could be “Purple, Gold Text” or “Initiatives-Red” or “Measures, Poor,” and so forth.

STEPS

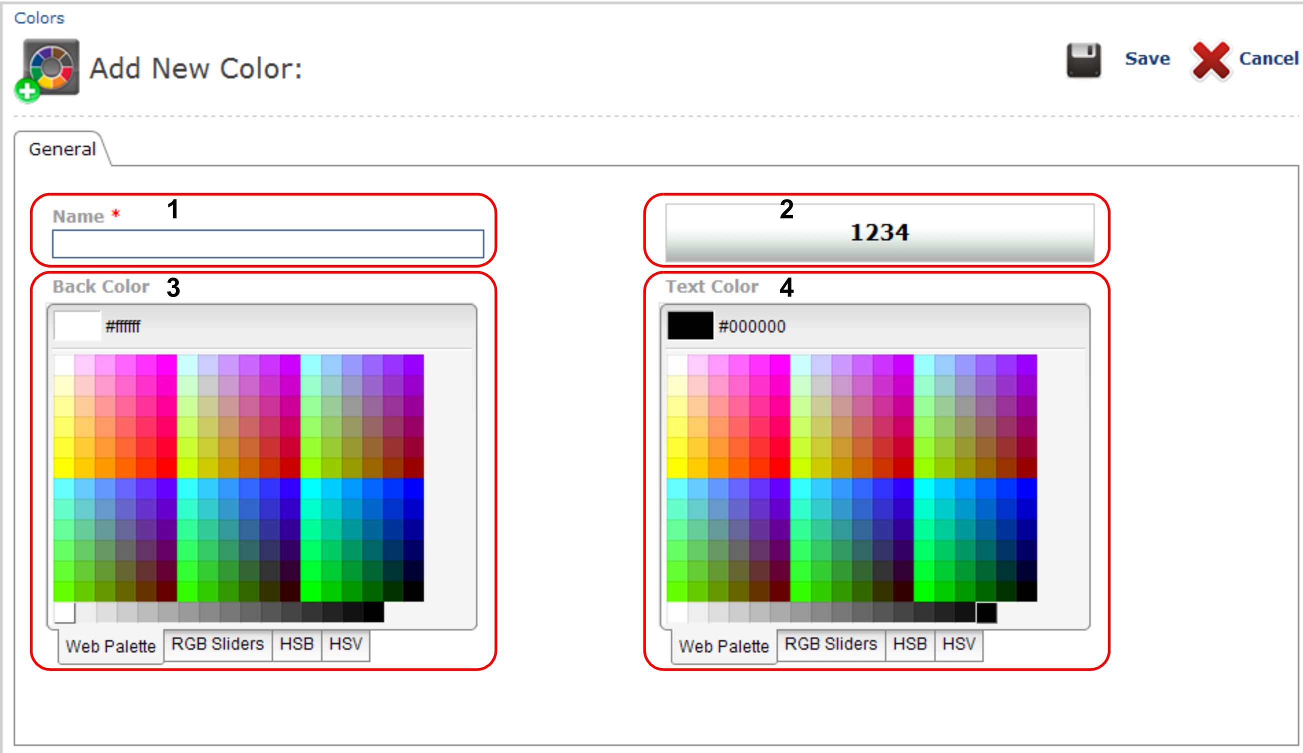
1. From the Menu bar, select the **Administration** menu, **Colors** command. This displays the Colors page.

Colors Page

NOTE: *For more information about the Colors page, see* *View the Color Codes List on page 16.*

2. Click the **Add New** link. This displays the Add New Color page.

Add New Color Page, General Tab



3. Notice the following about the Add New Color page:

- The page contains: 1) a Name field, 2) a Sample display box, 3) a Back Color tabbed palette (background color chooser), and 4) a Text Color tabbed palette (foreground color chooser).
- The Back Color and Text Color choosers each have four tabs at the bottom; each tab provides a different method for defining colors. The methods are based on current color models, which include Web Palette (web-safe colors), RGB (red, green, blue), HSB (hue, saturation, brightness), and HSV (hue, saturation, value).

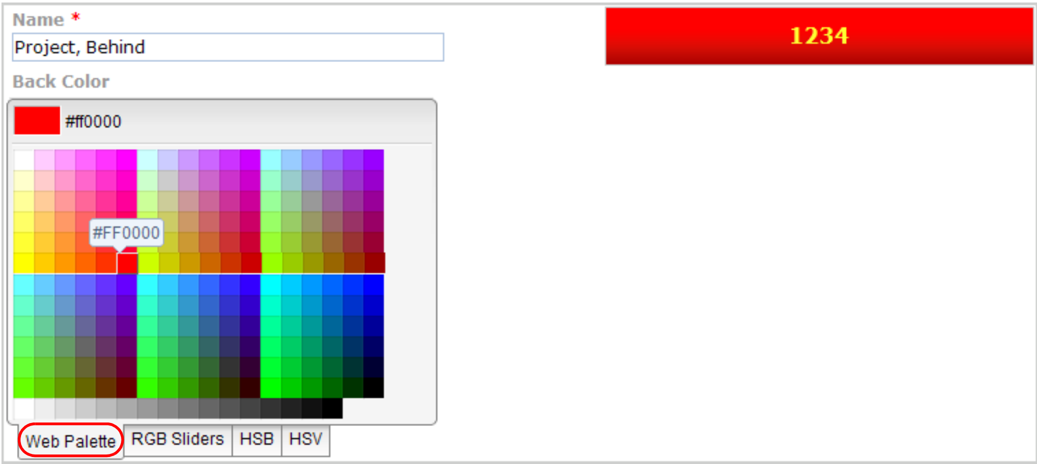
4. In the **Name** field, type up to 20 characters for the name of the new color code.

5. Define the background color for the color code as follows:

a. Click the **Back Color method** tab for the method to use to define the background color (**Web Palette**, **RGB Sliders**, **HSB**, or **HSV**).

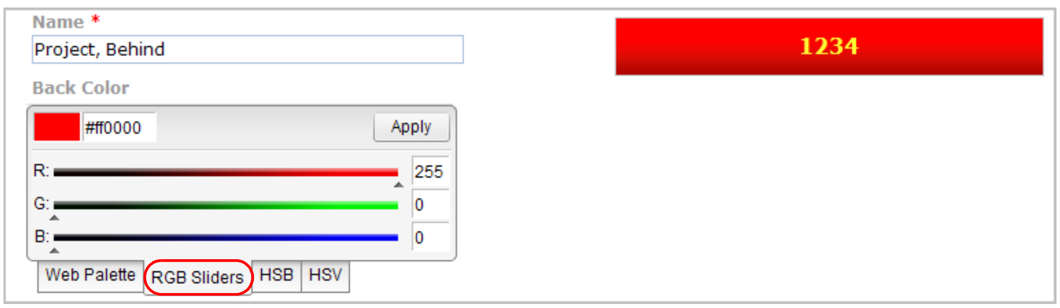
b. Depending on the method you selected, do one of the following to define the color:

Add New Color Page, Web Palette Tab



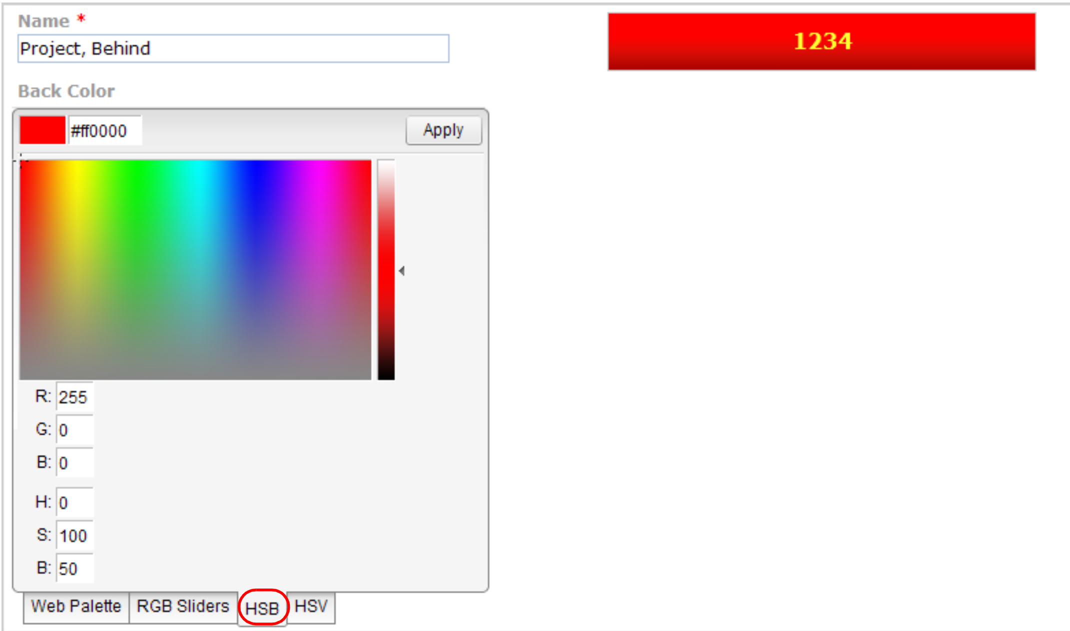
- **Web Palette — click the color** to use as the background color for the color code. The color and hexadecimal (HEX) number appear at the top of the palette and the Sample display box shows a sample of the color code (background and text color).

Add New Color Page, RGB Sliders Tab



- **RGB Sliders —** for each color (red, green, blue), **move each slider** (left to 0 or right to 255), or type a value (0 to 255) into each RGB number box to define the background color for the color code. The color and HEX number appear at the top of the palette. (Optionally, you can type a specific HEX number into the HEX number box.) When finished, click the **Apply** button. The Sample display box shows a sample of the color code (background and text color).

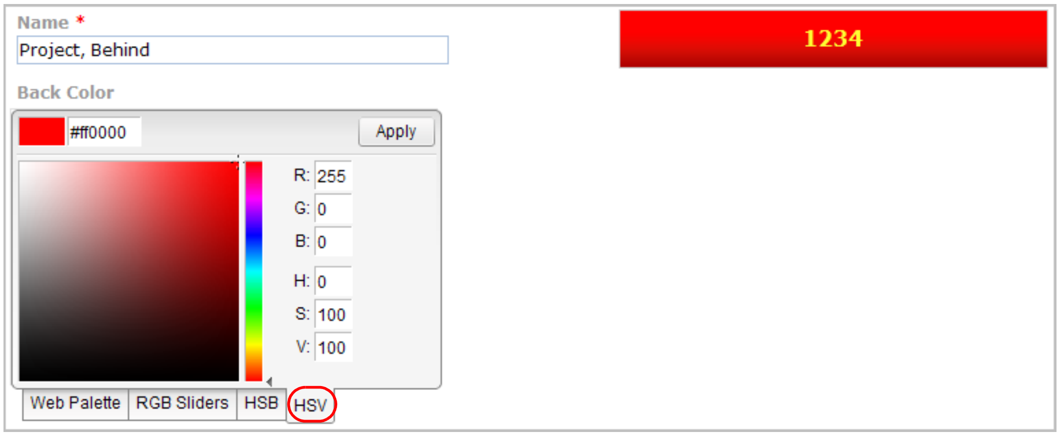
Add New Color Page, HSB Tab



- **HSB —** use the rainbow color palettes to select the background color for the color code. **Click in the large palette and move (or drag) the cursor** left or right to select the hue (0 at the left to 361 at the right); move (or drag) the cursor down or up to adjust the saturation (-1 at the bottom to 100 at the top). **Click in the small palette or move the slider** up and down to adjust the brightness (0 at the bottom to 100 at the top). The color and HEX number appear at the top of the palette. When finished, click the **Apply** button. The Sample display box shows a sample of the color code (background and text color).

  NOTE: *Alternatively, you can type a value into each R, G, or B box (0 to 255); type a value into each H, S, or B box (H: 0 to 361, S: -1 to 100, B: 0 to 100), or type a HEX number into the number box at the top of the palette and then click the Apply button.*

Add New Color Page, HSV Tab



- **HSV —** use the rainbow color palettes to select the background color for the color code. **Click in the small palette or move the slider** up and down to select the hue (0 at the bottom to 360 at the top). **Click in the large palette and move (or drag) the cursor** left or right to select the saturation (0 at the left to 101 at the right); move (or drag) the cursor down or up to adjust the value of the brightness, (-1 at the bottom to 100 at the top). The color and HEX number appear at the top of the palette. When finished, click the **Apply** button. The Sample display box shows a sample of the color code (background and text color).

  NOTE: *Alternatively, you can type a value into each R, G, or B box (0 to 255); type a value into each H, S, or V box (H: 0 to 360, S: 0 to 101, V: -1 to 100), or type a HEX number into the number box at the top of the palette and then click the Apply button.*

Add New Color Page, General Tab

6. Define the foreground (text) color for the color code as follows:
   a. In the Text Color tabbed palette, click the tab for the method to use to define the text (foreground) color (**Web Palette**, **RGB Sliders**, **HSB**, or **HSV**).
   b. Depending on the selected method, use the color chooser to define the color for the text. If necessary, refer to the instructions provided in the previous step (5.b.).
7. To save the new color code, click the **Save** link. (Depending on the application settings, either the page title changes from Add New Color to Edit Color or the page closes.)

   NOTE: *To optionally close the page without saving the new color code, click the Cancel link.*
8. If necessary, click either the **Cancel** link or the **Colors** link (above the page icon and title) to close the Edit Color page and return to the Colors list page. The new color code appears in the record list.

Edit a Color Code

Purpose

Use the steps in this section to change the name, background color, and/or foreground (text) color of an existing color code record.

NOTES

- Changes made to a color code record automatically update anywhere the color is being used in the application.

STEPS

1. From the Menu bar, select the **Administration** menu, **Colors** command. This displays the Colors page.

Colors Page

NOTE: *For more information about the Colors page, see View the Color Codes List on page 16.*

2. Click the **name** of the color or select the row **Actions** menu, **Edit** command for the color to edit. This displays the Edit Color page.
3. Change the **Name**, **Back Color**, and / or **Text Color** as necessary and then click the **Save** link. For details, refer to the steps in the *Add a New Color Code* section. Begin with Step 3. on page 19 and follow the steps through to the end.

Delete a Color Code

Purpose

Use the steps in this section to delete a color code record from the InsightVision application.

NOTES

- If a color is currently assigned to a Measure or Initiative/Task, the delete option will not be available. To delete a color it must first be removed from all places it is being used in the application.

STEPS

1. From the Menu bar, select the **Administration** menu, **Colors** command. This displays the Colors page.

Colors Page

NOTE: *For more information about the Colors page, see View the Color Codes List on page 16.*

2. Select the row **Actions** menu, **Delete** command for the color to delete. This displays a confirmation message.
3. Click the **OK** button to delete the color. The color code no longer appears in the record list.

NOTE: *To optionally keep the color, click the Cancel button.*

NOTES:

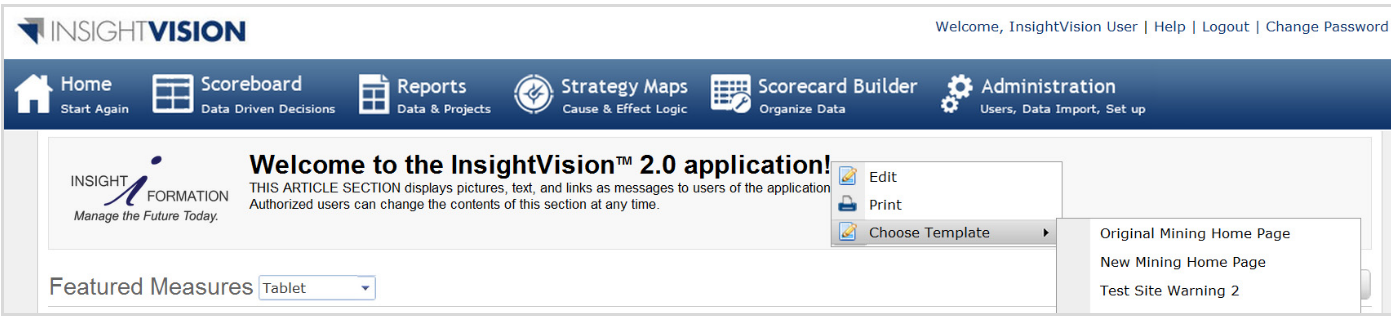
Chapter 4: Article Templates

Introduction

Article templates provide a method for composing and maintaining reusable content for the Article area of the Home page. They also provide a method for having an HTML-experienced person prepare Article area content so an HTML-inexperienced person can quickly place the template content into the Home page Article area.

See the example below where a User with the role of “Journalist” can right-click on the homepage article, click choose template, and select one of the predefined HTML templates.

Home Page, Article Area



This chapter includes the following sections for maintaining Article templates in the InsightVision application.

- *View the Article Templates List* on page 28
- *Add a New Article Template* on page 30
- *Edit an Article Template* on page 32
- *Delete an Article Template* on page 33

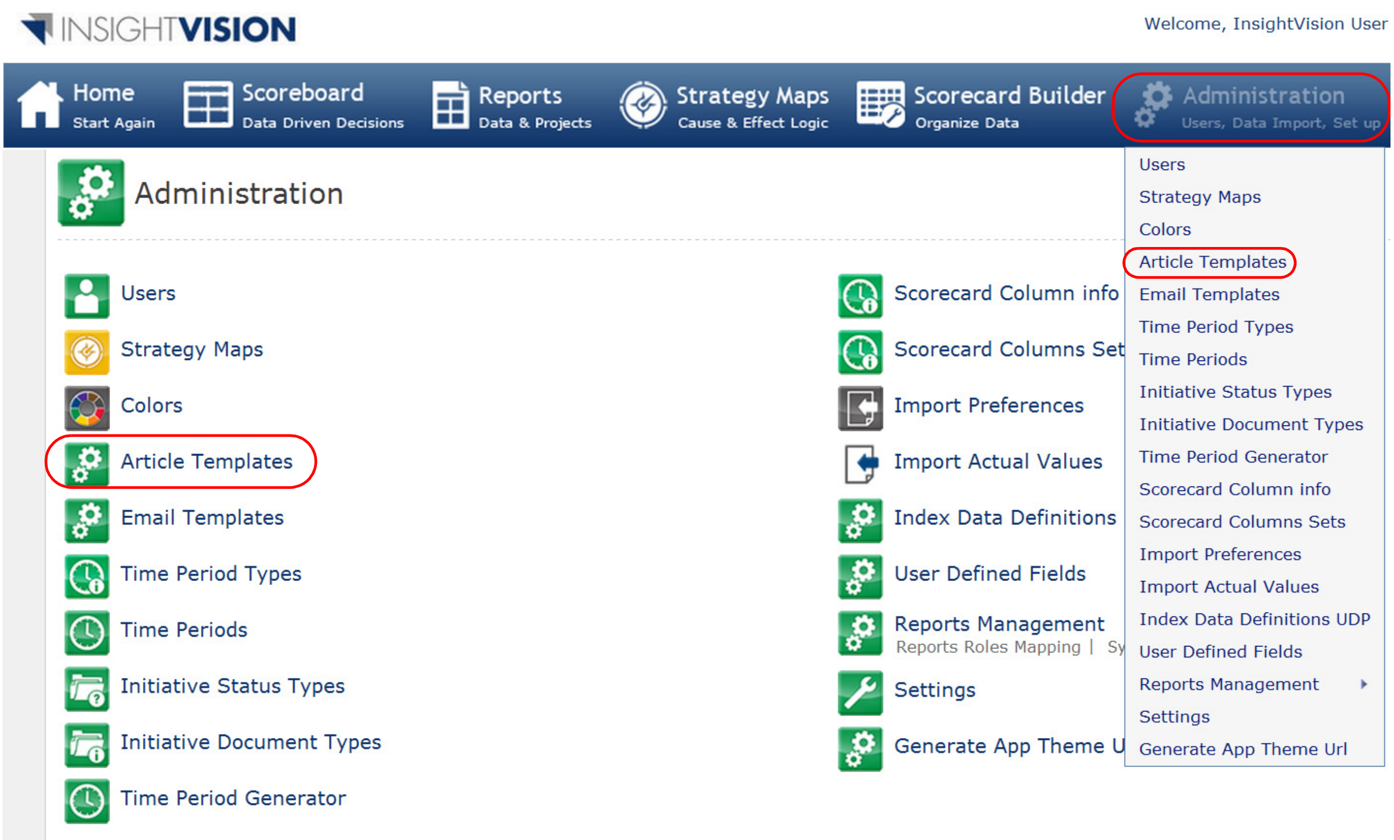
View the Article Templates List

Purpose

Use the steps in this section to view a list of the Article templates set up in the InsightVision application.

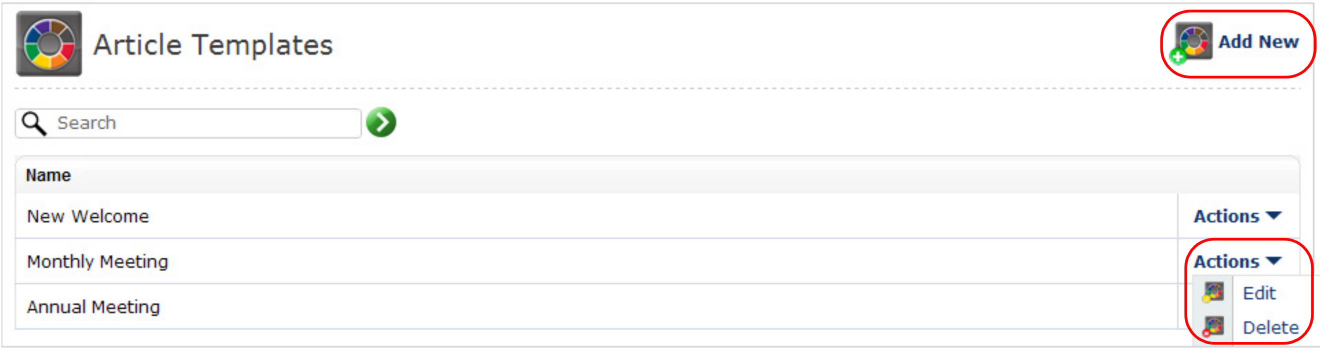
STEPS

Administration Menu



1. From the Menu bar, select the **Administration** menu, **Article Templates** command.
   This displays the Article Templates page.

Article Templates Page



2. Notice the following about the Article Templates page:

- The page lists the article template records set up in the application; the page has the basic features of a record list.
- The actions available on the page are Add New, Edit, and Delete.

3. Do any of the following:

- To add a new record, click the **Add New** link. See *Add a New Article Template* on page 30.
- To view or edit the details for a record, click the **name** of the template or select the row **Actions** menu, **Edit** command for the template to view or edit. See *Edit an Article Template* on page 32.
- To delete a record, select the row **Actions** menu, **Delete** command for the template to delete. See *Delete an Article Template* on page 33.
- To close the record list page, select a different command from the Menu bar.

Add a New Article Template

Purpose

Use the steps in this section to set up new article templates in the InsightVision application.

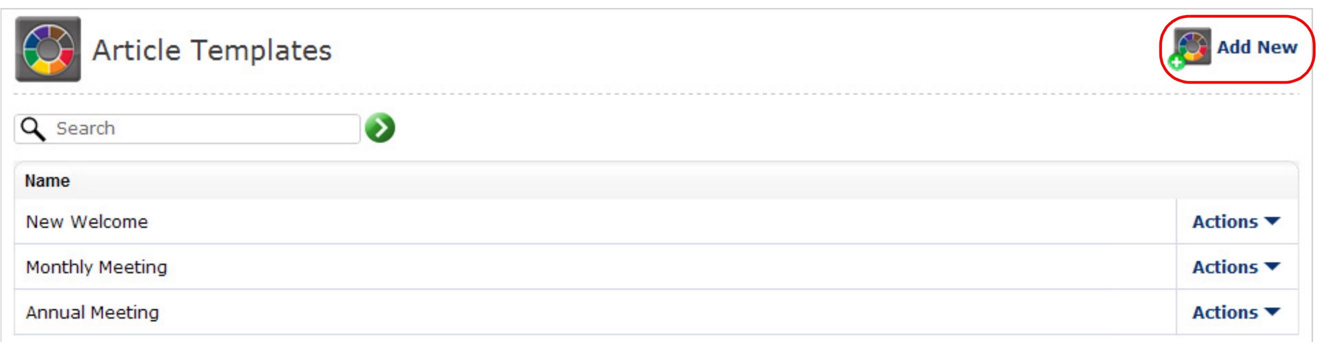
NOTES

- Before setting up templates, determine a naming system for the templates (up to 20 characters for each name).
- To add article templates, you must have a general knowledge about, or previous experience working with, HTML design and editing.
- To add a new template by copying an existing template: open the existing template, copy the HTML code to the PC clipboard, add a new template, and paste the HTML code into the HTML code tab of the new template.

STEPS

1. From the Menu bar, select the **Administration** menu, **Article Templates** command. This displays the Article Templates page.

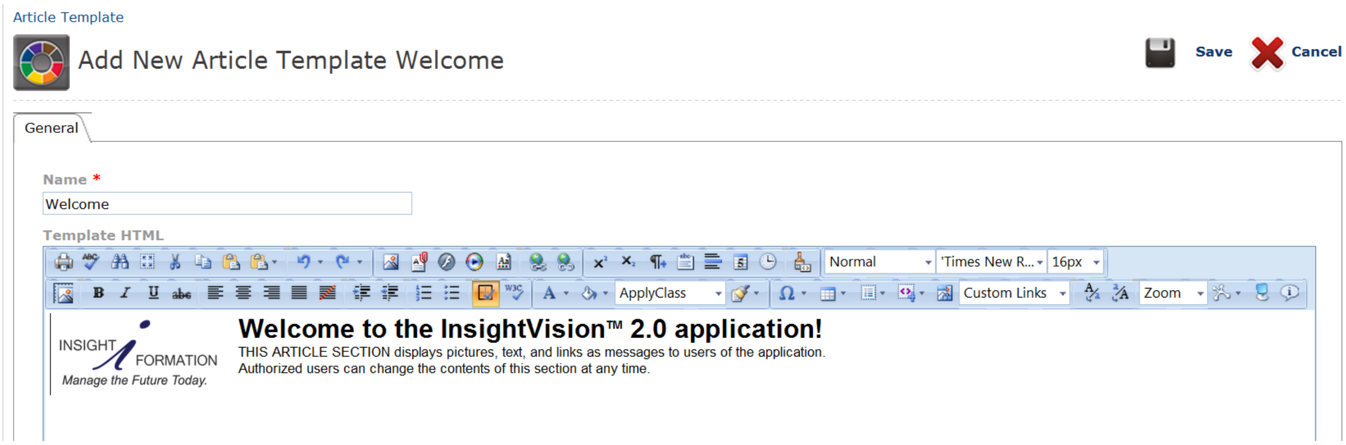
Article Templates Page



NOTE: *For more information about the Article Templates page, see* *View the Article Templates List on page 28.*

2. Click the **Add New** link. This displays the Add New Article Template page.

Add New Article Template Page, Design View



3. Notice the following about the Add New Article Template page:

- The page has the basic features of an Add New / Edit page (title, tabs, Save link, Cancel link, etc.).
- The page contains a Name field and a Template HTML editor area.
- The Template HTML editor area has three buttons at the bottom: Design, HTML, and Preview. These buttons provide access to the HTML editor modes as follows:
  - » Design mode is for what-you-see-is-what-you-get (WYSIWYG) editing and has many tabors and commands for use in composing the Article.
  - » HTML mode is for directly entering HTML code. This is where a skilled HTML editor could paste in HTML code developed using another HTML tool.
  - » Preview mode is for seeing how the Article will actually appear on the Home page.

4. In the **Name** field, type up to 20 characters for the name of the new template.

5. Compose the Article using the **Design** and **HTML** modes as necessary.

6. To optionally see a preview of the Article as it will appear on the Home page, use the **Preview** mode.

7. To save the new template, click the **Save** link. (Depending on the application settings, either the page title changes from Add New Article Template to Edit Article Template or the page closes.)

NOTE: *To optionally close the page without saving the new template, click the Cancel link.*

8. If necessary, click either the **Cancel** link or the **Article Template** link (above the page icon and title) to close the Edit Article Template page and return to the Article Templates list page. The new template name appears in the record list.

Edit an Article Template

Purpose

Use the steps in this section to change the name or content of an existing Article template.

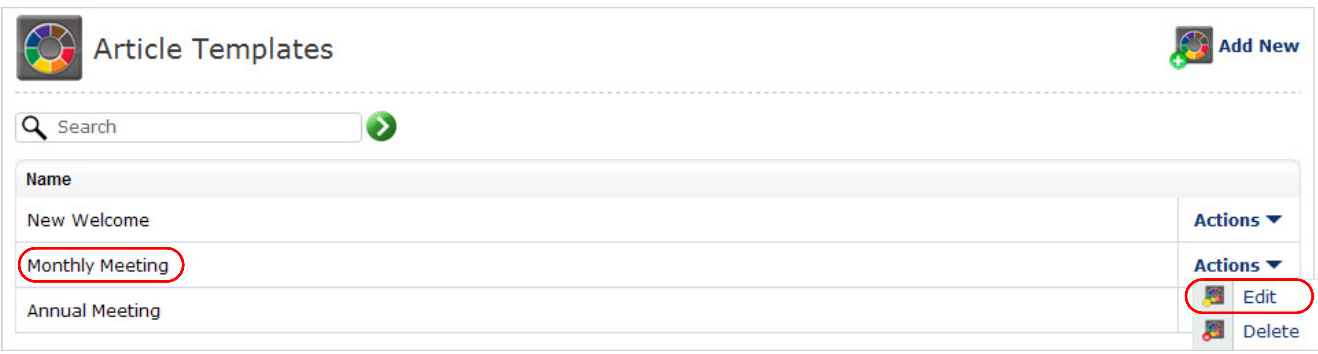
NOTES

- If the template is currently in use, changes made will not be reflected on the homepage. To apply the changes the template must be re-selected on the homepage and any changes made to the template on the homepage will be lost.

STEPS

1. From the Menu bar, select the **Administration** menu, **Article Templates** command. This displays the Article Templates page.

Article Templates Page



NOTE: *For more information about the Article Templates page, see View the Article Templates List on page 28.*

2. Click the **name** of the template or select the row **Actions** menu, **Edit** command for the template to edit. This displays the Edit Article Template page.
3. Change the **Name** and / or **Template HTML** content as necessary and then click the **Save** link. For details, refer to the steps in the *Add a New Article Template* section. Begin with Step 3. on page 31 and follow the steps through to the end.

Delete an Article Template

Purpose

Use the steps in this section to delete an Article template record from the InsightVision application.

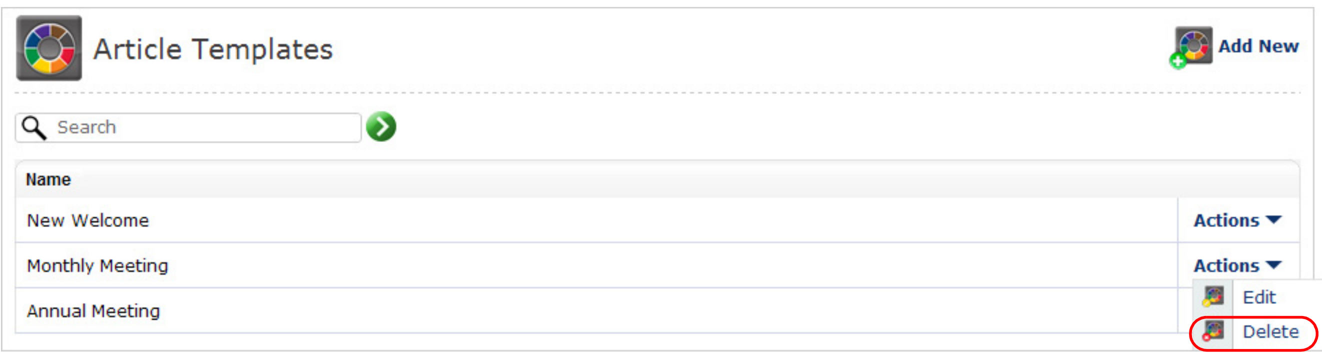
NOTES

- Deleting a Article Template will not affect the homepage if it is currently in use. To remove an article template from the homepage, delete the HTML code or apply a new template.

STEPS

1. From the Menu bar, select the **Administration** menu, **Article Templates** command. This displays the Article Templates page.

Article Templates Page



NOTE: *For more information about the Article Templates page, see View the Article Templates List on page 28.*

2. Select the row **Actions** menu, **Delete** command for the template to delete. This displays the message, "Are you sure you want to delete this item?"
3. Click the **OK** button to delete the template. The template name no longer appears in the record list.

NOTE: *To optionally keep the template, click the Cancel button.*

NOTES:

Chapter 5: E-Mail Templates

Introduction

E-mail templates provide a method for customizing the predesigned E-mail messages that the application sends automatically to users based on certain events occurring in the application, such as new User record creation, User password reset, or comment maintenance.

Password Reset E-mail Message Example

This chapter includes the following sections for maintaining E-Mail templates in the InsightVision application.


This email is to inform you that your password has been reset on your hosted InsightVision Website.

Is this email not displaying correctly?
Please allow images.

INSIGHTVISION

Password Reset

Greetings,

This email is to inform you that the password for your InsightVision account **insightuser@insightvision.com** has been reset. You should change it to something more familiar.

Username: insightuser@insightvision.com
Password: MErts415E41d

Steps For Changing Your Password:

Step 1:	Click Here
Step 2:	Login using **insightuser@insightvision.com** and **MErts415E41d**
Step 3:	Carefully key your new password into both fields. The password you choose must be at least 5 characters long. Then press "Change Password".
Step 4:	Click yes in the pop up window to confirm your action.

For all other questions please contact your InsightVision Administrator.

Thank you,

Hosted Services Department
Insightformation, Inc.

INSIGHT FORMATION

1-800-498-0203
support@insightformation.com
4050 Olson Memorial Highway, Suite 445
Golden Valley, MN 55422

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*NOTE: This is a notification email only. Please do not reply to this email. If you have questions, please remit to your InsightVision Administrator, or email our support staff.

- *View the E-Mail Templates List* on page 36
- *Edit an E-Mail Template* on page 38

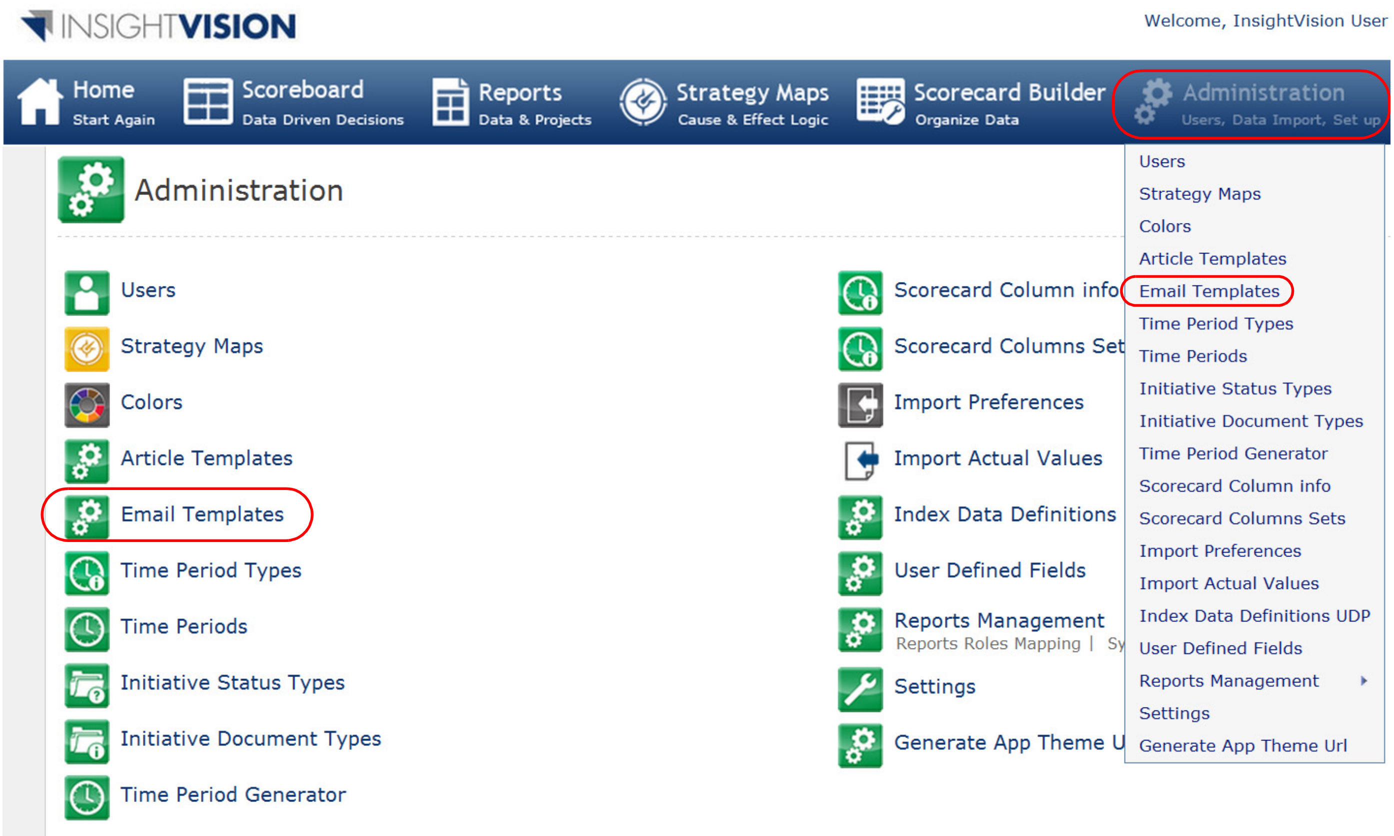
View the E-Mail Templates List

Purpose

Use the steps in this section to view a list of the E-Mail templates set up in the InsightVision application.

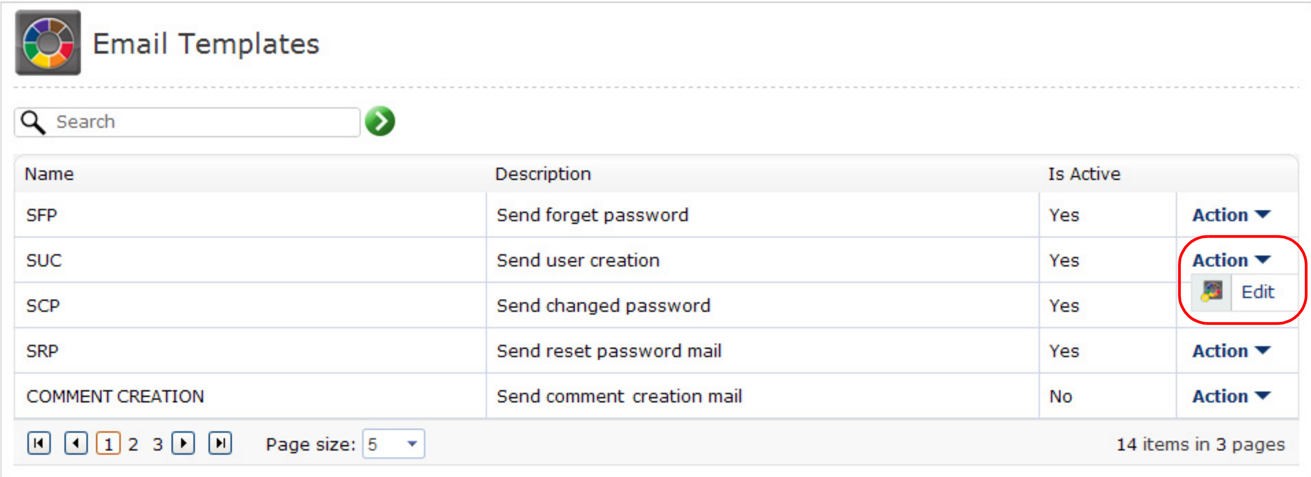
STEPS

Administration Menu



1. From the Menu bar, select the **Administration** menu, **Email Templates** command. This displays the Email Templates page.

E-Mail Templates Page



2. Notice the following about the Email Templates page:

- The page lists the Email template records set up in the application; the page has the basic features of a record list.
- The action available on the page is Edit.
- The record list has an *Is Active* column that indicates if each template is active or not (turned on or off).

3. Do either of the following:

- To view or edit the details for a record, click the **name** of the template or select the row **Actions** menu, **Edit** command for the template to view or edit. See *Edit an E-Mail Template* on page 38.
- To close the record list page, select a different command from the Menu bar.

Edit an E-Mail Template

Purpose

Use the steps in this section to customize the name, content, and / or activity status of a predesigned E-mail template.

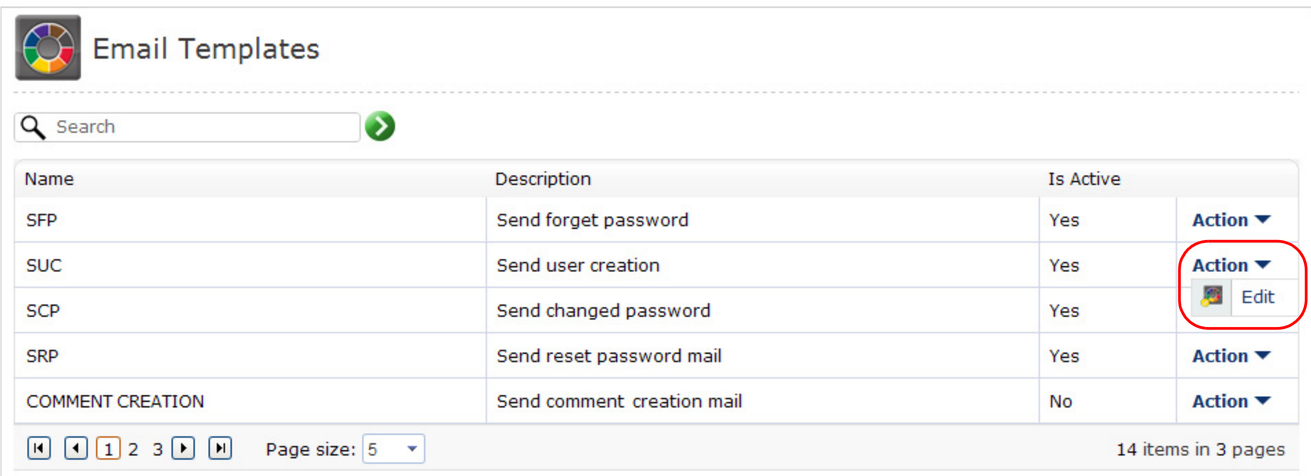
NOTES

- To edit e-mail templates, you must have a general knowledge about, or previous experience working with, HTML design and editing as well as a basic knowledge of programming tags.

STEPS

1. From the Menu bar, select the **Administration** menu, **Email Templates** command. This displays the Email Templates page.

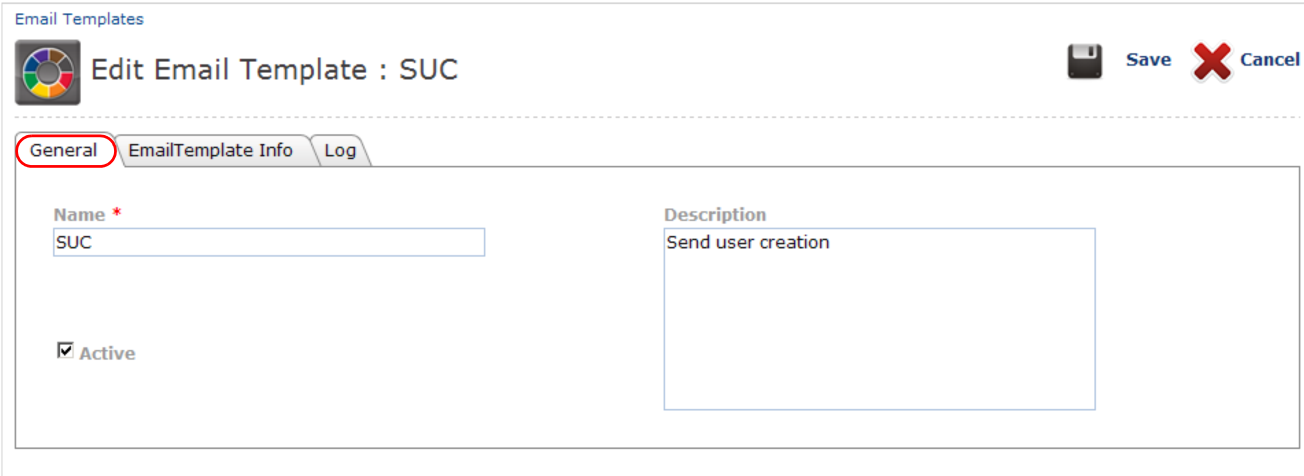
Email Templates Page



NOTE: *For more information about the Email Templates page, see View the E-Mail Templates List on page 36.*

2. Click the **name** of the template or select the row **Actions** menu, **Edit** command for the template to edit. This displays the Edit Email Template page.

Edit Email Template, General Tabbed Page



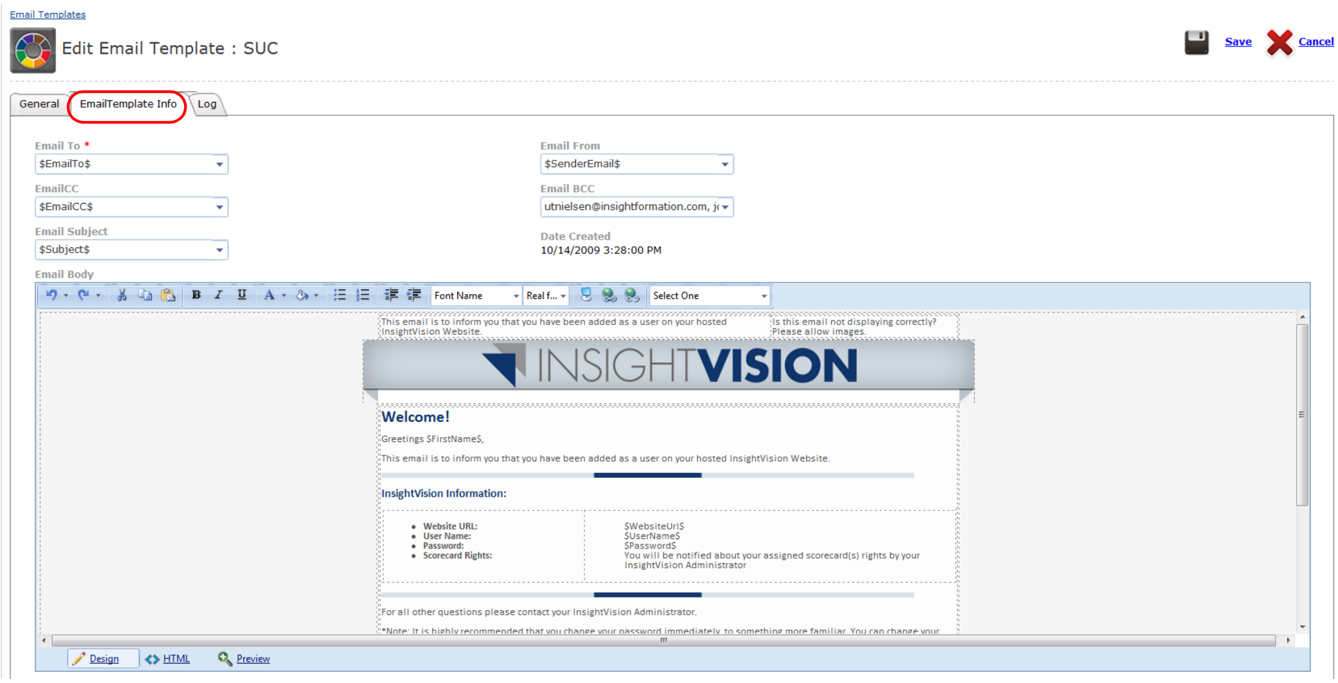
***NOTE:** The page has the basic features of an Add New / Edit page (title, tabs, Save link, Cancel link, etc.).*

3. Optionally, edit the fields on the General tabbed page:

Name	Type up to 20 characters to change the template name.
Description	Type up to 200 characters to change the template description.
Active	• To make automatic generation of e-mail messages based on the template active (turn on), place a checkmark in the checkbox. • To make automatic generation of e-mail messages based on the template inactive (turn off), remove the checkmark from the checkbox.

4. Click the **EmailTemplate Info** tab.

Edit Email Template, EmailTemplate Info Tabbed Page



5. Notice the following about the EmailTemplate Info tabbed page:
   - The page has several fields at the top with an Email Body HTML editor area below them.
   - The Template HTML editor area has three buttons at the bottom: Design, HTML, and Preview. These buttons provide access to the HTML editor modes as follows:
     - » Design mode is for what-you-see-is-what-you-get (WYSIWYG) editing and has many toolbars and commands for use in composing the e-mail template.
     - » HTML mode is for directly entering HTML code.
     - » Preview mode is for seeing how the template will actually appear as an e-mail message.
6. Change any of the fields as necessary.
7. Modify the e-mail message body using the **Design** and **HTML** modes as necessary.
8. To optionally see a preview of the e-mail message, use the **Preview** mode.
9. To save the template changes, click the **Save** link.

   NOTE: *To optionally close the page without saving the changes, click the Cancel link.*
10. If necessary, click either the **Cancel** link or the **Email Templates** link (above the page icon and title) to close the Edit Email Template page and return to the Email Templates list page.

Chapter 6: Time Period Types

Introduction

Time Periods are used in the InsightVision application for entering data values for Measures. Since Strategic Measures almost always have a variety of different time periods (e.g. Fiscal quarters, semi-annual, school year, semi-monthly, bi-weekly), InsightVision does not force all the measures to be managed on a single calendar. Each measure has its own “Time Period Type” and then specific Time Periods are defined for those Time Period types. Time periods and their corresponding data values appear together on the Home page, Scoreboard page, and on views and reports when Measure records are displayed.

This chapter includes the following sections for maintaining Time Period Type records in the InsightVision application.

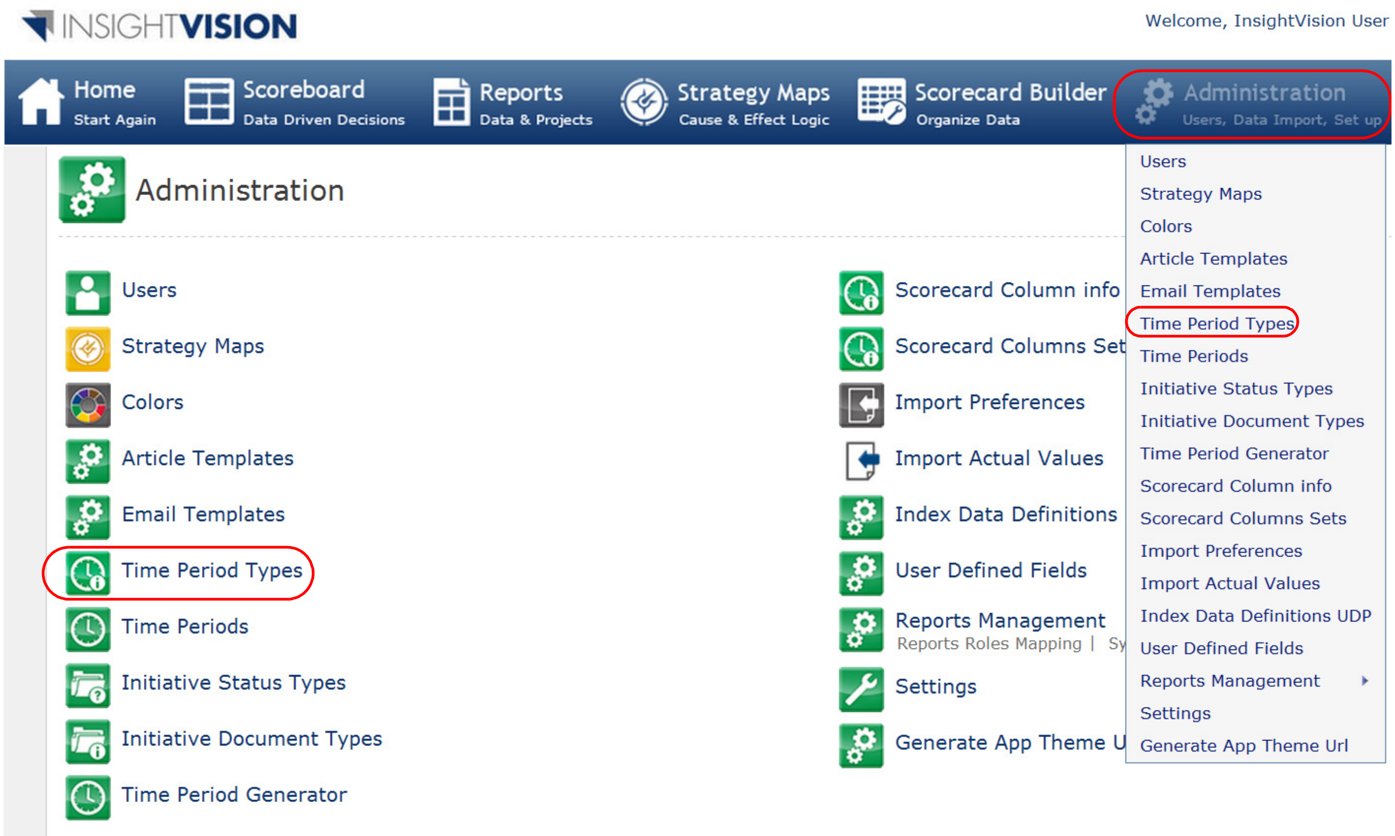
View the Time Period Types List

Purpose

Use the steps in this section to view the time period types that are set up in the InsightVision application.

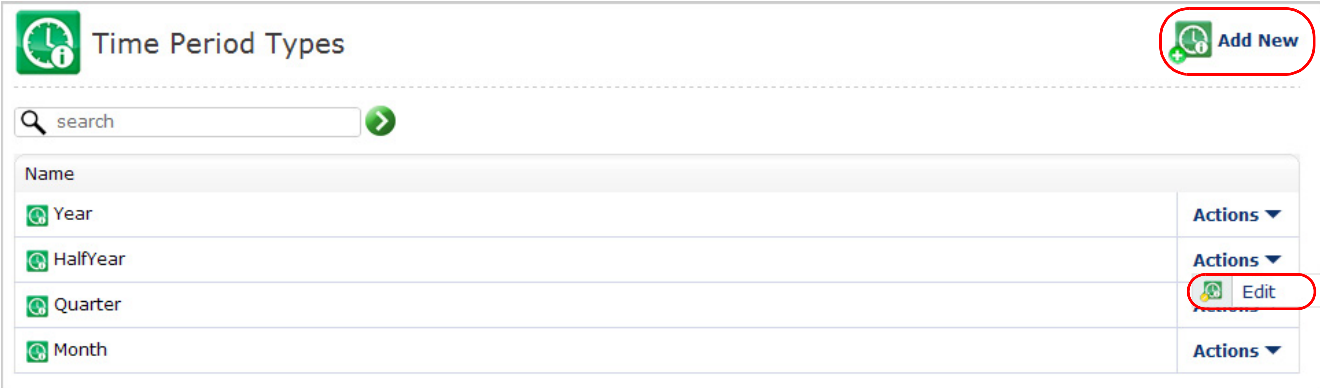
STEPS

Administration Menu



1. From the Menu bar, select the **Administration** menu, **Time Period Types** command. This displays the Time Period Types page.

Time Period Types Page



2. Notice the following about the Time Period Types page:
   - The page lists the time period types set up in the application; the page has the basic features of a record list.
   - The predefined types, based on a 12 month year (either calendar or fiscal), include:
     - » **Year —** has one (1) time period per year, which is at the end (last day) of the 12th month.
     - » **Half Year —** has two (2) time periods per year, which are at the end (last day) of the 6th and 12th months.
     - » **Quarter —** has four (4) time periods per year, which are at the end (last day) of the 3rd, 6th, 9th, and 12th months.
     - » **Month —** has twelve (12) time periods per year, which are at the end (last day) of each month.
   - The actions available on the page are Add New and Edit.
3. Do any of the following:
   - To add a new time period type, click the **Add New** link. See *Add a New Time Period Type* on page 44.
   - To view or edit the details for a time period type, click the **name** of the time period type or select the row **Actions** menu, **Edit** command for the type to view or edit. See *Edit a Time Period Type* on page 46.
   - To delete a time period type, contact your InsightVision Account Representative.
   - To close the Time Period Types list page, select a different command from the Menu bar.

Add a New Time Period Type

Purpose

Use the steps in this section to set up new time period types in the InsightVision application.

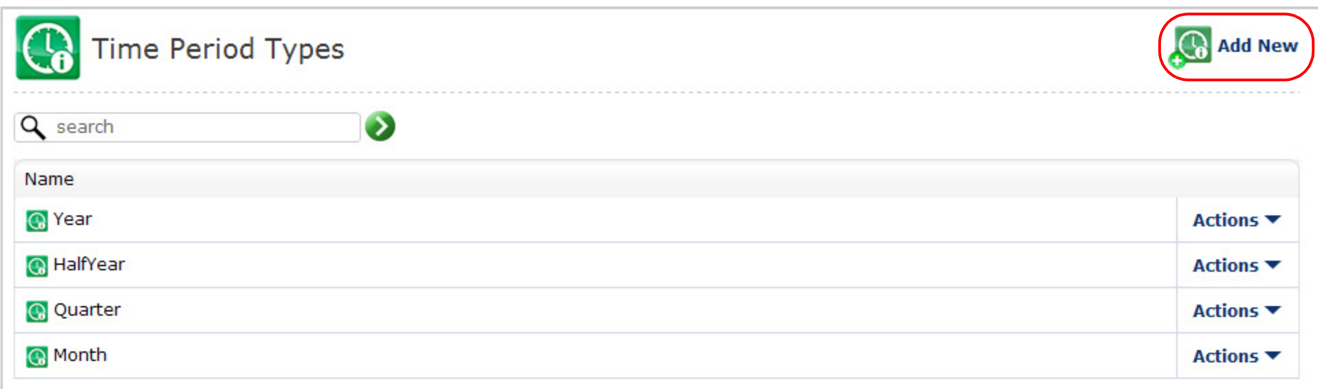
NOTES

- To create a new time period type and populate it with the appropriate time period records, it is easier to use the time period generator. See the **Time Period Generator Chapter**

STEPS

1. From the Menu bar, select the **Administration** menu, **Time Period Types** command. This displays the Time Period Types page.

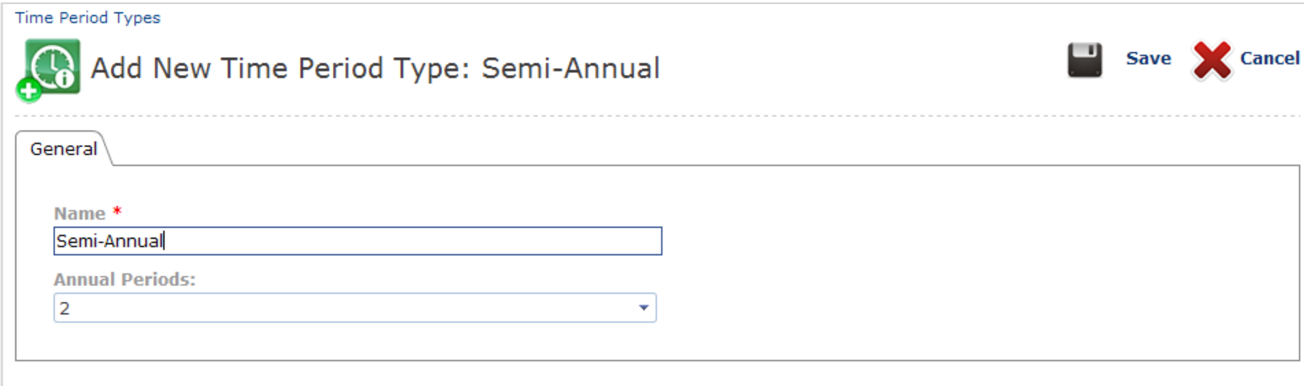
Time Period Types Page



NOTE: *For more information about the Time Period Types page, see View the Time Period Types List on page 42.*

2. Click the **Add New** link. This displays the Add New Time Period Type page.

Add New Time Period Type Page



3. Complete the following fields on the General tabbed page:

Name	Enter the name for your Time Period Type up to 20 characters. This name is what will be displayed when selecting the Time Period Type for Measures in the Scorecard Builder.
Annual Periods	Select the number of annual periods. The number of Annual Periods is the number of time periods that occur within 12 months for the time period type. ***NOTE:*** *A Quarterly Time Period Type would have 4 Annual Periods, a Monthly Time Period Type would have 12 Annual Periods, and a Yearly Time Period Type would have 1 Annual Period.* ***NOTE:*** *This field cannot be changed once the record is saved*

4. To save the new time period type, click the **Save** link.

NOTE: *To optionally close the page without saving the new time period type, click the Cancel link.*

5. If necessary, click either the **Cancel** link or the **Time Period Types** link (above the page icon and title) to close the Edit Time Period Type page and return to the Time Period Types list page. The new time period type appears in the record list.

Edit a Time Period Type

Purpose

Use the steps in this section to change the name of an existing Time Period Type record.

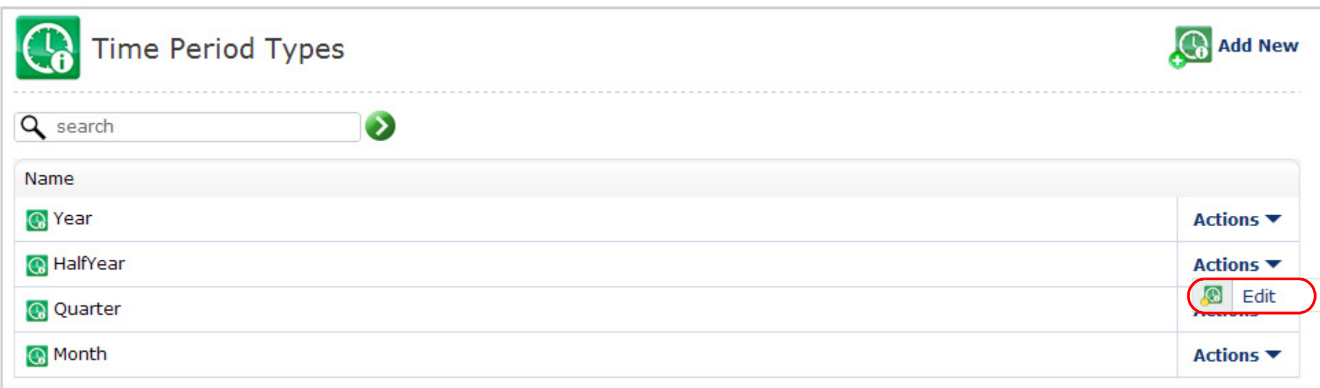
NOTES

- Changes made to a Time Period Type record automatically update anywhere the Time Period Type is being used in the application.

STEPS

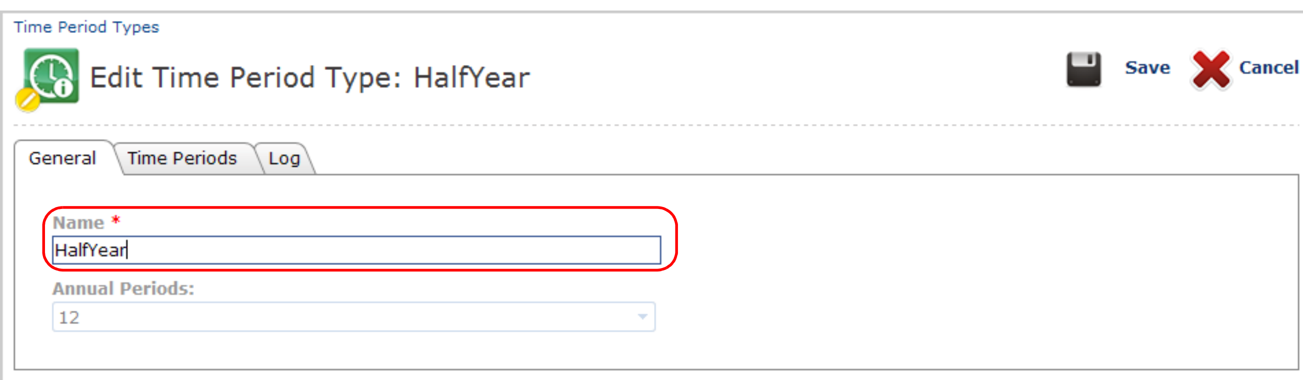
1. From the Menu bar, select the **Administration** menu, **Time Period Types** command. This displays the Time Period Types page.

Time Period Types Page



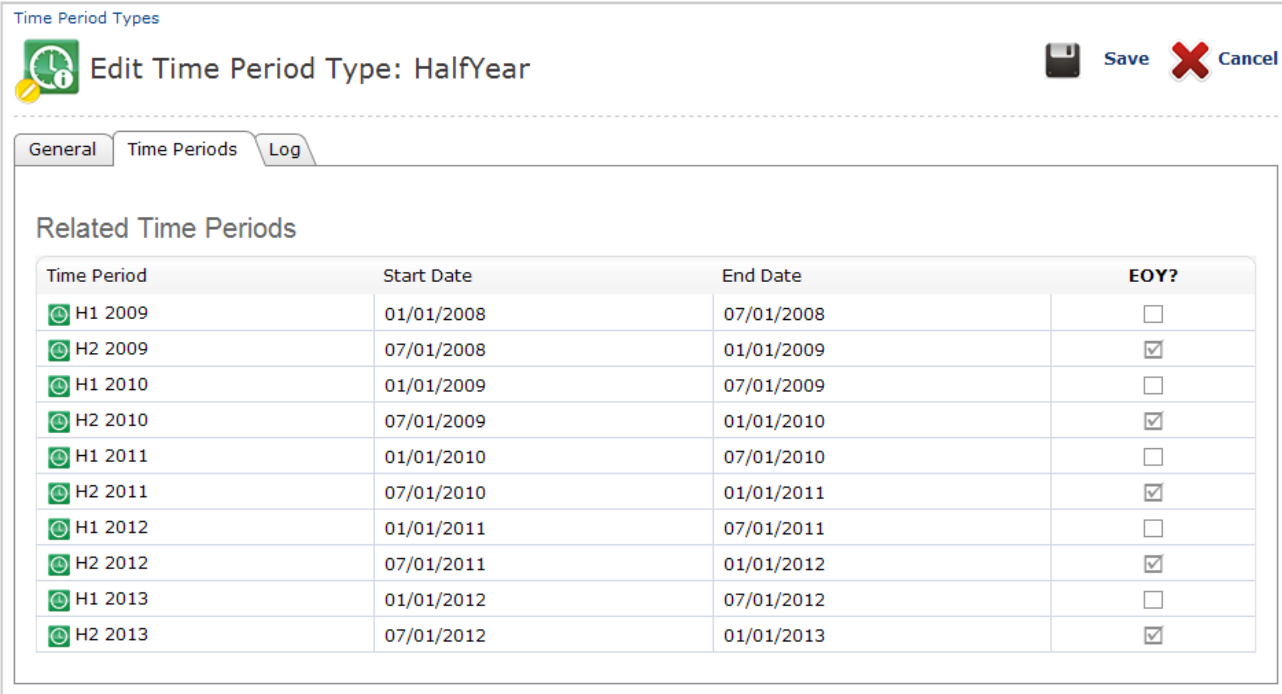
NOTE: *For more information about the Time Period Types page, see* *View the Time Period Types List on page 42.*

2. Click the **name** of the time period type or select the row **Actions** menu, **Edit** command for the time period type to edit. This displays the Edit Time Period Type page.



3. Change the **Name** as necessary.
4. Optionally, click the **Time Periods** tab to view the Time Periods set up for the Time Period Type.

Home Page, Article Area



Time Period	Start Date	End Date	EOY?
H1 2009	01/01/2008	07/01/2008	☐
H2 2009	07/01/2008	01/01/2009	☑
H1 2010	01/01/2009	07/01/2009	☐
H2 2010	07/01/2009	01/01/2010	☑
H1 2011	01/01/2010	07/01/2010	☐
H2 2011	07/01/2010	01/01/2011	☑
H1 2012	01/01/2011	07/01/2011	☐
H2 2012	07/01/2011	01/01/2012	☑
H1 2013	01/01/2012	07/01/2012	☐
H2 2013	07/01/2012	01/01/2013	☑

5. Notice the following about the Time Period Types page:

- The page lists the time periods set up for the time period type; the page has the basic features of a record list.

NOTE: *To optionally close the page without saving the new name, click the Cancel link.*

6. To save the new time period type, click the **Save** link.

NOTE: *To optionally close the page without saving the new time period type, click the Cancel link.*

7. If necessary, click either the **Cancel** link or the **Time Period Types** link (above the page icon and title) to close the Edit Time Period Type page and return to the Time Period Types list page. The renamed time period type appears in the record list.

NOTES:

Chapter 7: Time Periods

Introduction

The Time Period area available in the Administration Menu allows you to define increments of time (days, weeks, months, etc.) for each existing Time Period Types.

Time Periods are used in the InsightVision application for entering data values for Measures. Time periods and their corresponding data values appear together on the Home page, Scoreboard page, and on views and reports when Measure records are displayed.

This chapter includes the following sections for maintaining User records in the InsightVision application.

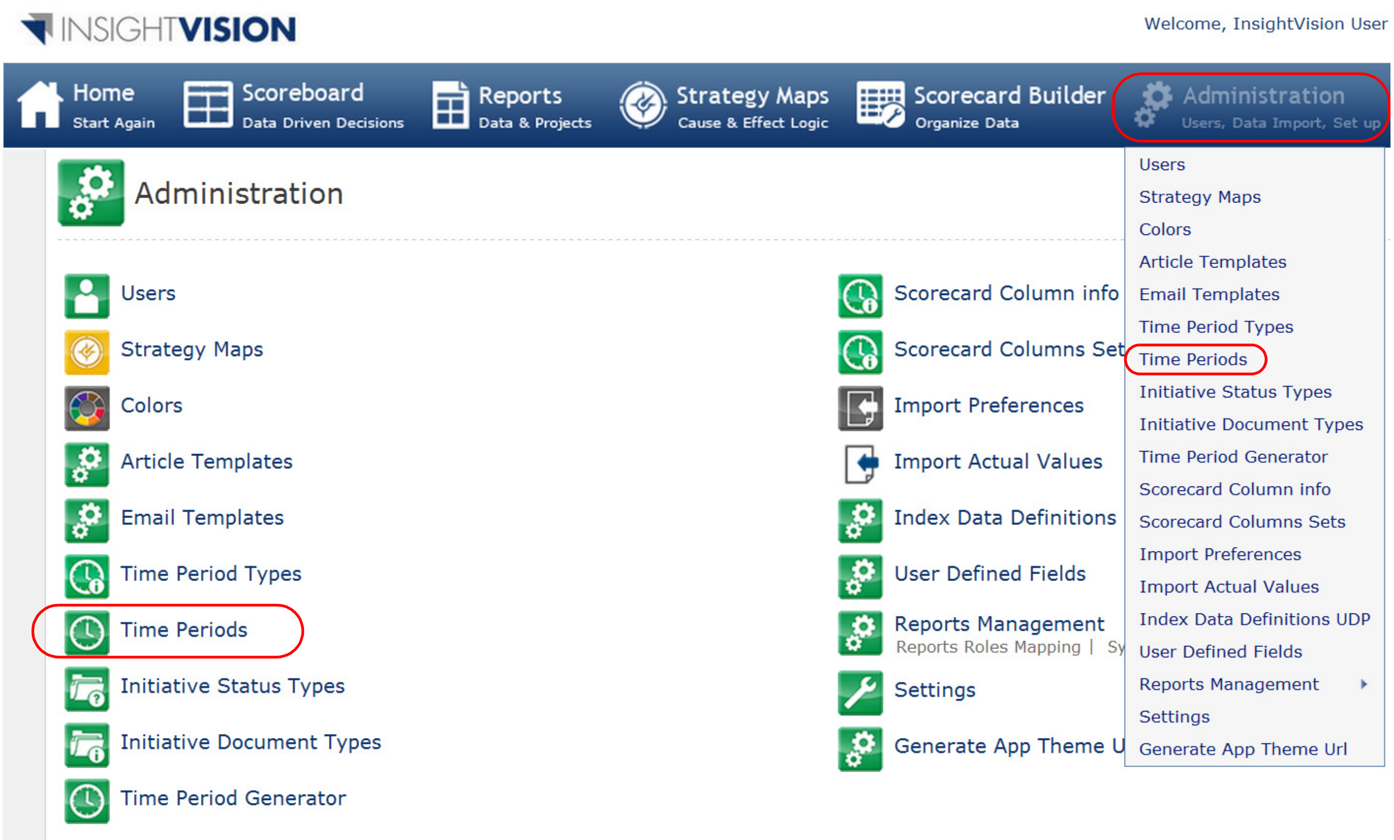
View the Time Periods List

Purpose

Use the steps in this section to view the time period set up in the InsightVision application.

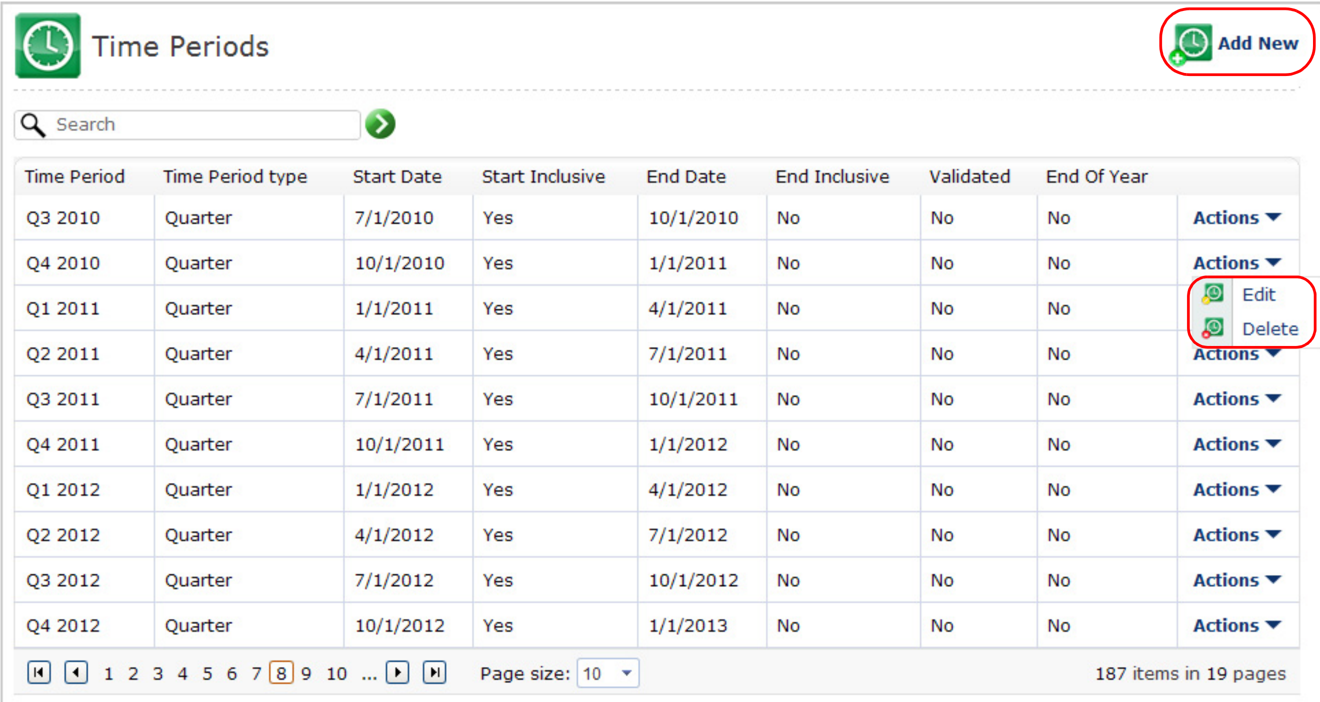
STEPS

Administration Menu



1. From the Menu bar, select the **Administration** menu, **Time Periods** command.
This displays the Time Periods page.

Time Periods Page



2. Notice the following about the Time Periods page:
   - The page lists the time periods set up in the application; the page has the basic features of a record list.
   - The column names are described in *Add a New Time Period* on page 52.
   - The actions available on the page are Add New, Edit, and Delete.
3. Do any of the following:
   - To add a new time period record, click the **Add New** link. See *Add a New Time Period* on page 52.

     NOTE: *When adding a new Time Period make sure you use the same naming convention that the Time Period Generator used when creating the Time Period Type for which the new Time Period is being created.*
   - To view or edit the details for a time period record, click the **name** of the Time Period (first column) or select the row **Actions** menu, **Edit** command for the record. See *Edit a Time Period* on page 55.
   - To delete a time period record, see *Delete a Time Period* on page 57.

     NOTE: *The Delete command appears on the Actions menu only if the selected time period has no Data Values entered for it (on a Measure).*
   - To close the Time Periods list page, select a different command from the Menu bar.

Add a New Time Period

Purpose

Use the steps in this section to set up new time period records in the InsightVision application.

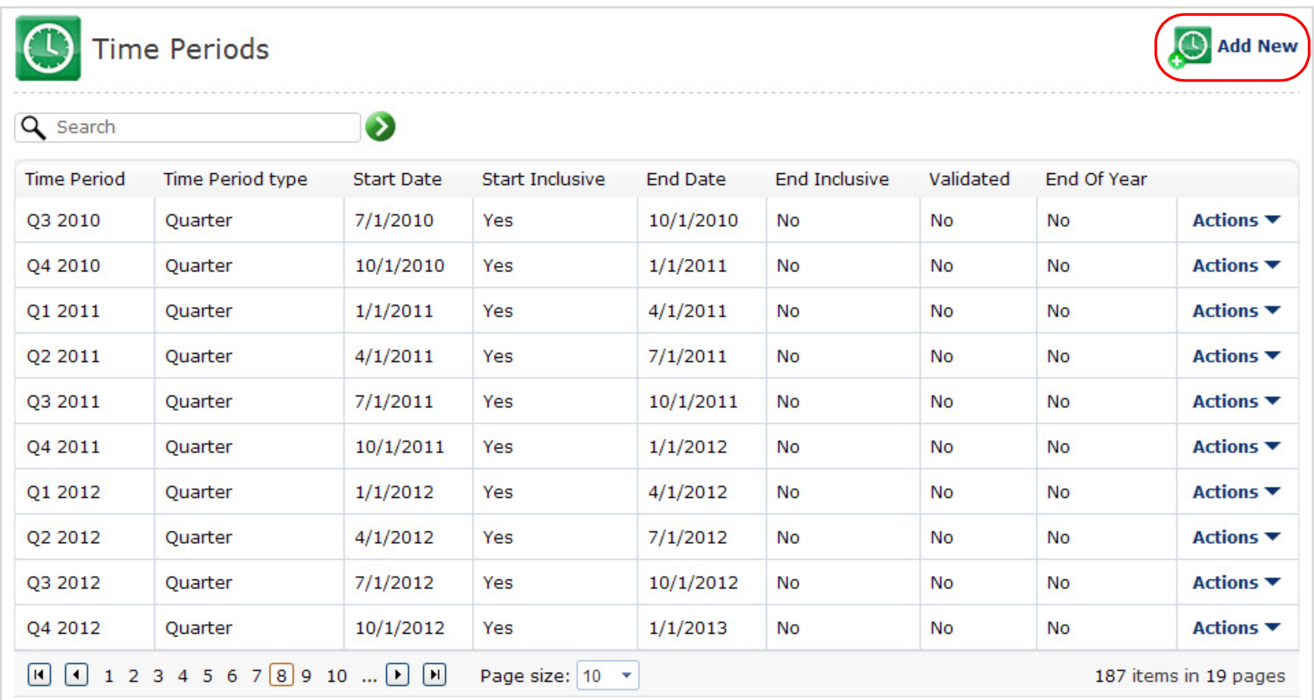
NOTES

- Generally, Time Periods are added by using the Time Period Generator function, which adds multiple Time Period records at once. **See the Time Period Generator chapter.**

STEPS

1. From the Menu bar, select the **Administration** menu, **Time Periods** command. This displays the Time Periods page.

Time Periods Page



Time Periods

Add New

Search

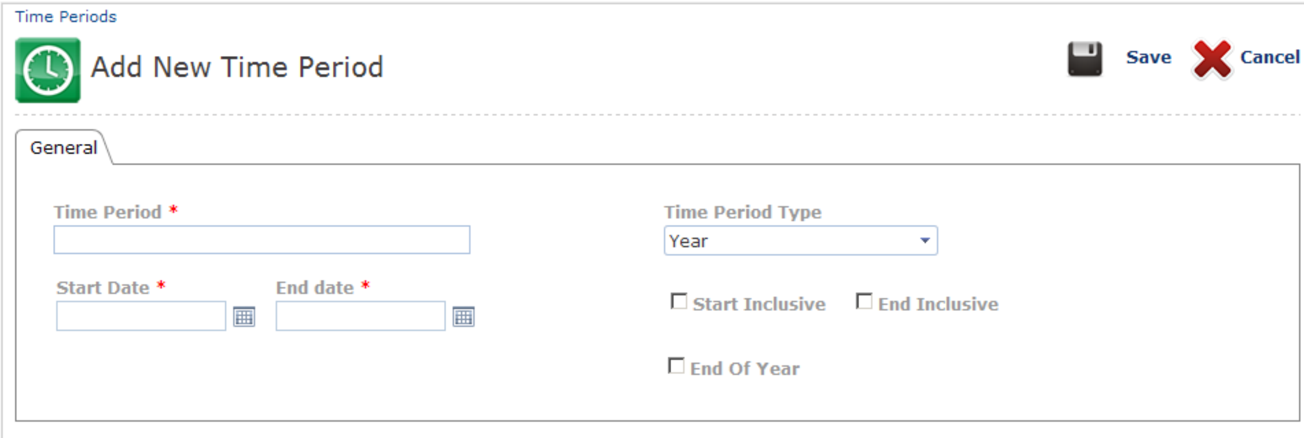
Time Period	Time Period type	Start Date	Start Inclusive	End Date	End Inclusive	Validated	End Of Year	
Q3 2010	Quarter	7/1/2010	Yes	10/1/2010	No	No	No	Actions
Q4 2010	Quarter	10/1/2010	Yes	1/1/2011	No	No	No	Actions
Q1 2011	Quarter	1/1/2011	Yes	4/1/2011	No	No	No	Actions
Q2 2011	Quarter	4/1/2011	Yes	7/1/2011	No	No	No	Actions
Q3 2011	Quarter	7/1/2011	Yes	10/1/2011	No	No	No	Actions
Q4 2011	Quarter	10/1/2011	Yes	1/1/2012	No	No	No	Actions
Q1 2012	Quarter	1/1/2012	Yes	4/1/2012	No	No	No	Actions
Q2 2012	Quarter	4/1/2012	Yes	7/1/2012	No	No	No	Actions
Q3 2012	Quarter	7/1/2012	Yes	10/1/2012	No	No	No	Actions
Q4 2012	Quarter	10/1/2012	Yes	1/1/2013	No	No	No	Actions

1 2 3 4 5 6 7 8 9 10 ... Page size: 10 187 items in 19 pages

NOTE: *For more information about the Time Period page, see* *View the Time Periods List on page 50.*

2. Click the **Add New** link. This displays the Add New Time Periods page.

Add New Time Periods Page



3. Complete the following fields on the General tabbed page:

Time Period	Type up to 10 characters for the name of the time period.
Time Period Type	Select the time period type for the time period.
Start Date	Do one of the following to enter the beginning date for this time period. • Click the calendar icon to select a date, or • Type the date using a *mm/dd/yyyy* format, where *mm* is the month, *dd* is the day, and *yyyy* is the year.
End Date	Do one of the following to enter the ending date for this time period. • Click the calendar icon to select a date, or • Type the date using a *mm/dd/yyyy* format, where *mm* is the month, *dd* is the day, and *yyyy* is the year.
Start Inclusive	• If the time period includes the Start Date (above), select the checkbox. • If the time period does not include the Start Date (above), clear the checkbox. ***NOTE:*** *The best practice is to end a period with the first day of the NEXT period and not include it. So, Calendar Year 2010 would End on January 1, 2011 but would NOT be End Inclusive. So, Calendar Year 2010 would go up to (but not including) January 1, 2011.*
End Inclusive	• If the time period includes the End Date (above), select the checkbox. • If the time period does not include the End Date (above), clear the checkbox.
End of Year	• If the time period includes the last day of a year for the selected Time Period Type (above), select the checkbox. • If the time period does not include the last day of a year for the selected Time Period Type (above), clear the checkbox.

4. To save the new time period record, click the **Save** link. (Depending on the application settings, either the page title changes from Add New Time Period to Edit Time Period or the page closes.)

   NOTE: *To optionally close the page without saving the new time period type, click the Cancel link.*

5. If necessary, click either the **Cancel** link or the **Time Periods** link (above the page icon and title) to close the Edit Time Period page and return to the Time Period list page. The new time period appears in the record list.

Edit a Time Period

Purpose

Use the steps in this section to change the name of an existing time period record.

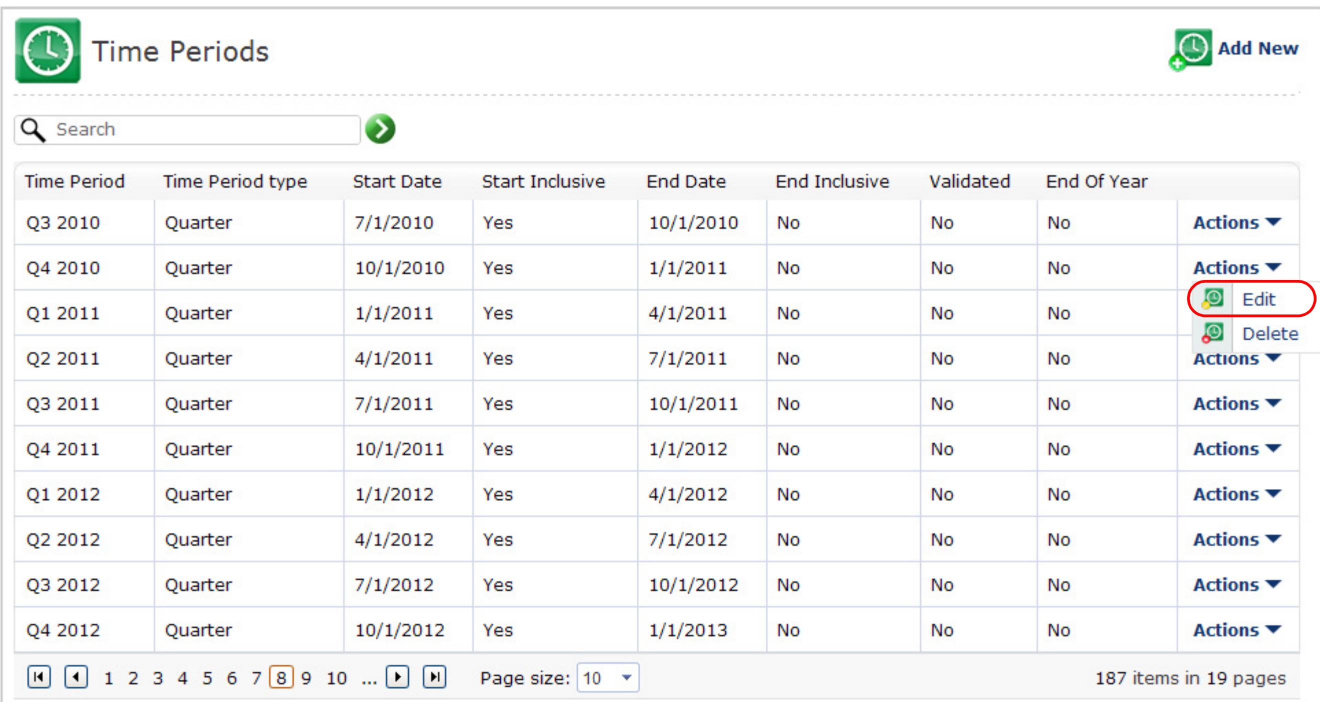
NOTES

- Changes made to a time period record automatically update anywhere the time period is used.

STEPS

1. From the Menu bar, select the **Administration** menu, **Time Periods** command. This displays the Time Periods page.

Time Periods Page

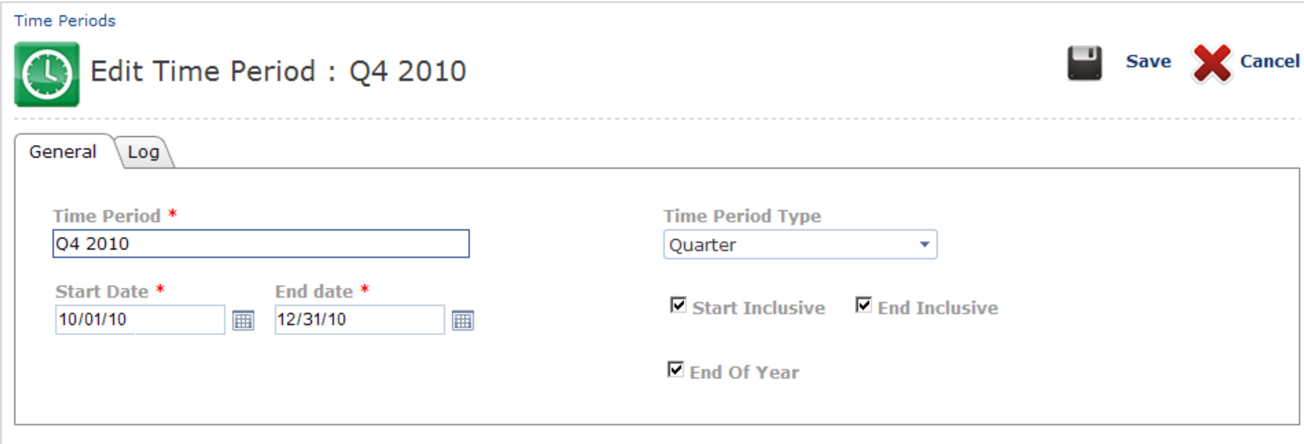


Time Period	Time Period type	Start Date	Start Inclusive	End Date	End Inclusive	Validated	End Of Year	
Q3 2010	Quarter	7/1/2010	Yes	10/1/2010	No	No	No	Actions
Q4 2010	Quarter	10/1/2010	Yes	1/1/2011	No	No	No	Actions
Q1 2011	Quarter	1/1/2011	Yes	4/1/2011	No	No	No	
Q2 2011	Quarter	4/1/2011	Yes	7/1/2011	No	No	No	Actions
Q3 2011	Quarter	7/1/2011	Yes	10/1/2011	No	No	No	Actions
Q4 2011	Quarter	10/1/2011	Yes	1/1/2012	No	No	No	Actions
Q1 2012	Quarter	1/1/2012	Yes	4/1/2012	No	No	No	Actions
Q2 2012	Quarter	4/1/2012	Yes	7/1/2012	No	No	No	Actions
Q3 2012	Quarter	7/1/2012	Yes	10/1/2012	No	No	No	Actions
Q4 2012	Quarter	10/1/2012	Yes	1/1/2013	No	No	No	Actions

***NOTE:** For more information about the Time Periods page, see View the Time Periods List on page 50.*

2. Click the **name** of the time period or select the row **Actions** menu, **Edit** command for the time period to edit. This displays the Edit Time Periods page.

Edit Time Period Page



3. Change the fields as necessary and then click the **Save** link.

NOTE: *To optionally close the page without saving the changes, click the Cancel link.*

Delete a Time Period

Purpose

Use the steps in this section to delete a time period record from the InsightVision application.

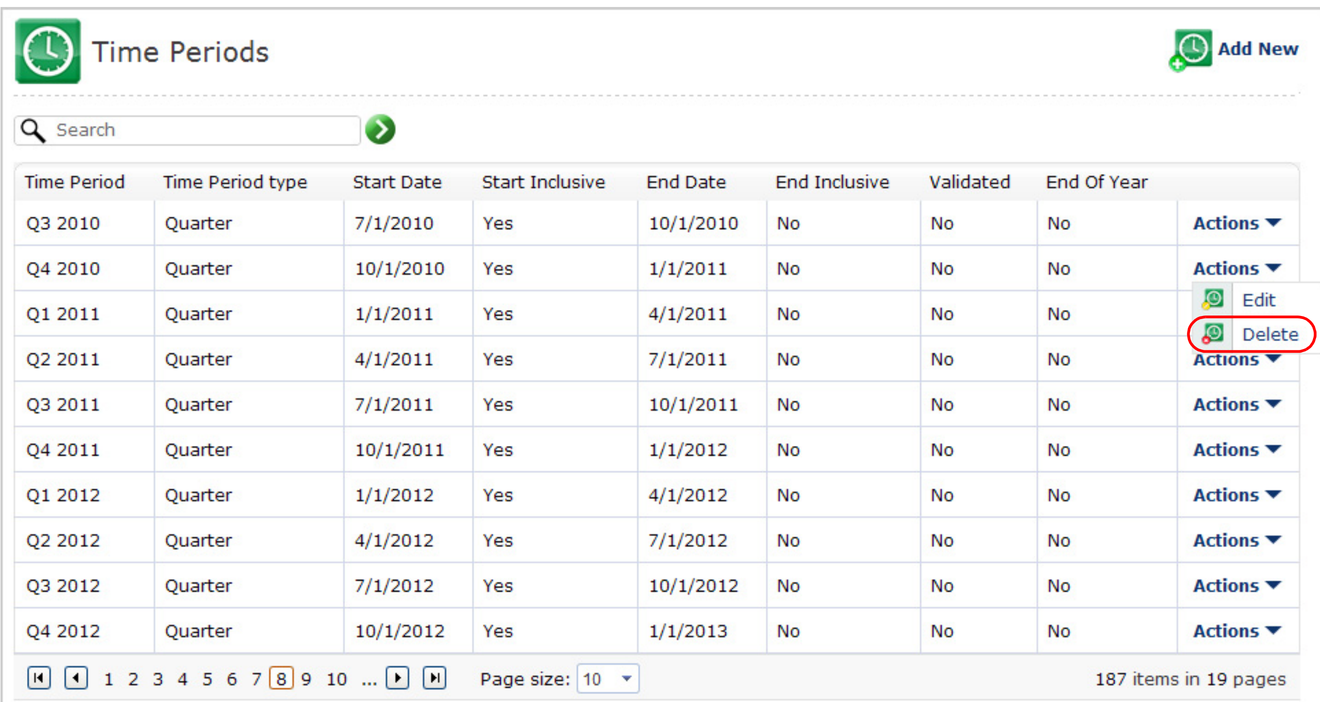
NOTES

- A time period currently being used by an actual value on a Measure cannot be deleted.

STEPS

1. From the Menu bar, select the **Administration** menu, **Time Periods** command. This displays the Time Periods page.

Time Periods Page



Time Period	Time Period type	Start Date	Start Inclusive	End Date	End Inclusive	Validated	End Of Year	
Q3 2010	Quarter	7/1/2010	Yes	10/1/2010	No	No	No	Actions
Q4 2010	Quarter	10/1/2010	Yes	1/1/2011	No	No	No	Actions
Q1 2011	Quarter	1/1/2011	Yes	4/1/2011	No	No	No	
Q2 2011	Quarter	4/1/2011	Yes	7/1/2011	No	No	No	Actions
Q3 2011	Quarter	7/1/2011	Yes	10/1/2011	No	No	No	Actions
Q4 2011	Quarter	10/1/2011	Yes	1/1/2012	No	No	No	Actions
Q1 2012	Quarter	1/1/2012	Yes	4/1/2012	No	No	No	Actions
Q2 2012	Quarter	4/1/2012	Yes	7/1/2012	No	No	No	Actions
Q3 2012	Quarter	7/1/2012	Yes	10/1/2012	No	No	No	Actions
Q4 2012	Quarter	10/1/2012	Yes	1/1/2013	No	No	No	Actions

1 2 3 4 5 6 7 8 9 10 ...

NOTE: *For more information about the Time Periods page, see* *View the Time Periods List on page 50.*

2. Select the row **Actions** menu, **Delete** command for the time period to delete. This displays a confirmation message.

NOTE: *If the time period is in use, the Delete command does not appear on the Actions menu.*

3. Click the **OK** button to delete the time period. The time period no longer appears in the record list.

NOTE: *To optionally keep the time period, click the Cancel button.*

NOTES:

Chapter 8: Time Period Generator

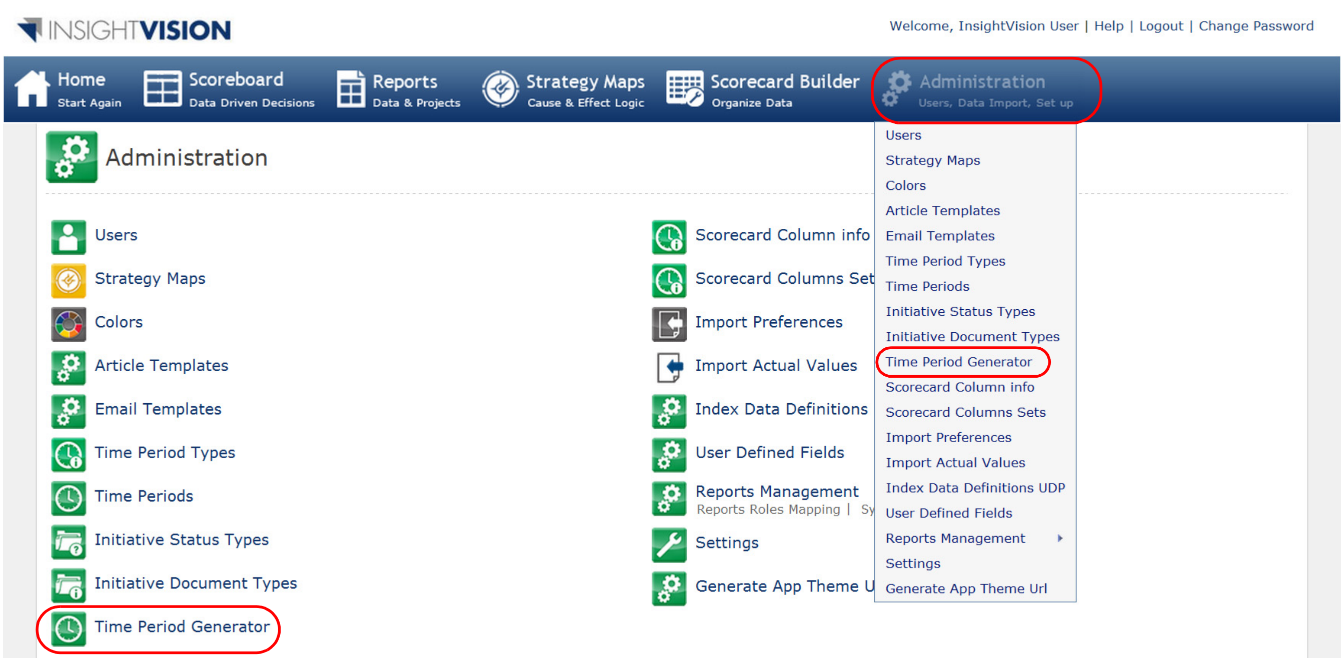
Introduction

The Time Period Generator is used to create custom time periods for an organization such as a unique fiscal year or quarter system. The InsightVision software comes with a number of pre-existing time periods including Year, Half-Year, Quarter, and Month which are all based on the calendar system (January 1st Start, December 31st End). To create your own time periods open the Time Period Generator and follow the instructions.

The Time Period Generator has 5 steps:

- Step 1: Select Time Period Type
- Step 2: Select the Start and End Date for the Time Period
- Step 3: Design Time Period Name
- Step 4: Select the Time Period Range to Create Time Periods For
- Step 5: Confirm Accuracy

Administration Menu



From the Menu bar, select the **Administration** menu, **Time Period Generator** command.
This displays the Time Period Generator page.

Time Period Generator Page

1. Click the **Start** button to begin using the Time Period Generator.
2. Follow the step-by-step instructions given on each page of the Time Period Generator.

Chapter 9: Initiative (and Task) Status Types

Introduction

Initiative Status is assigned to Initiative and Task records and used as a method of showing progress on the Home page, Measure at a Glance view, Initiative Monitor report, Initiative Presentation view, Related Initiatives view, and Sub-Initiatives view, as shown below and on the next two pages.

The Status of an Initiative or Task is manually selected from a Drop-down list by the Initiative (or Task) Owner or by a Scorecard Builder. The choices on those drop-down lists are managed in this list of “Initiative Status Types.

This chapter includes the following sections for maintaining Initiative Status Types in the InsightVision application.

- *View the Initiative Status Types List* on page 62
- *Add a New Initiative Status Type* on page 64
- *Edit an Initiative Status Type* on page 66
- *Delete an Initiative Status Type* on page 68

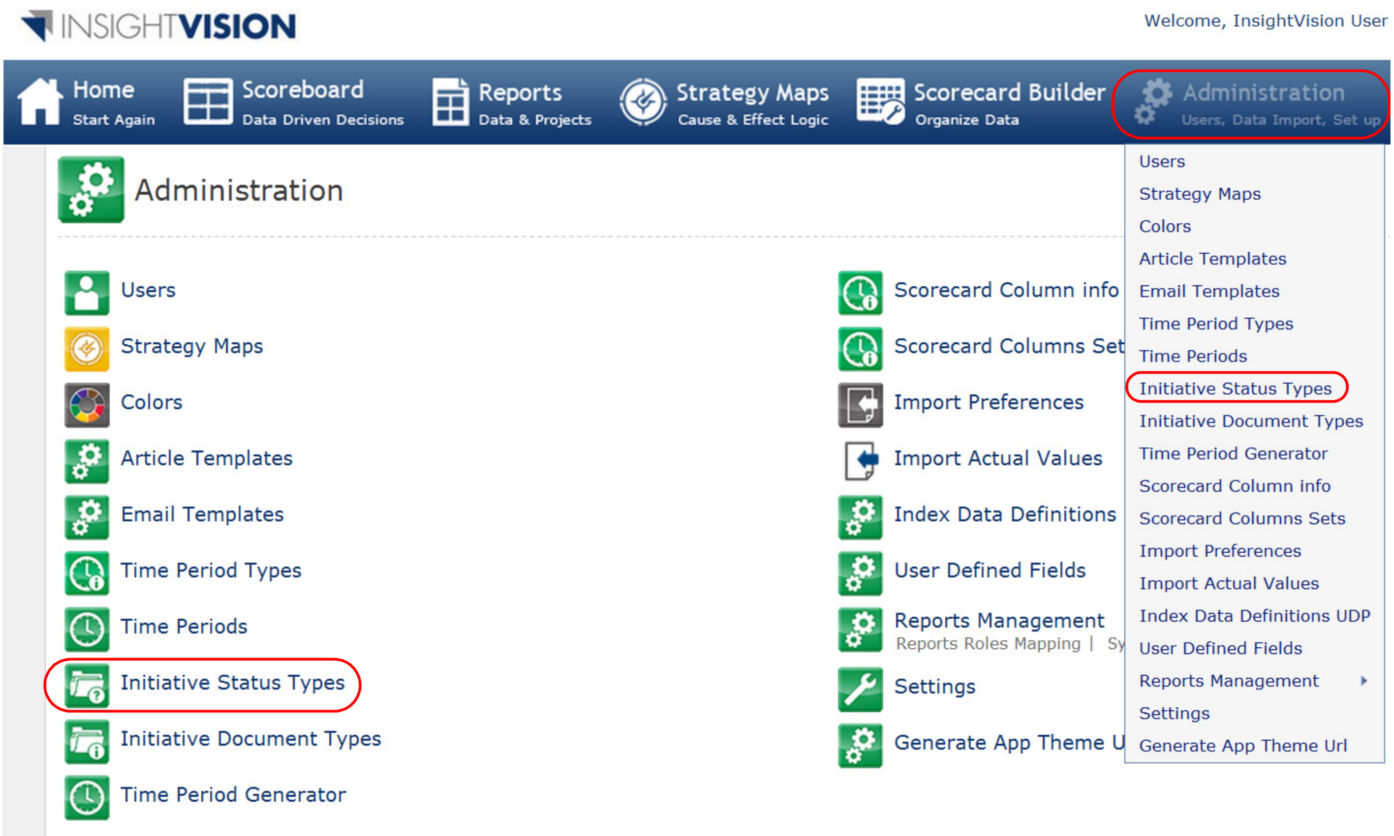
View the Initiative Status Types List

Purpose

Use the steps in this section to view the Initiative Status Types set up in the InsightVision application.

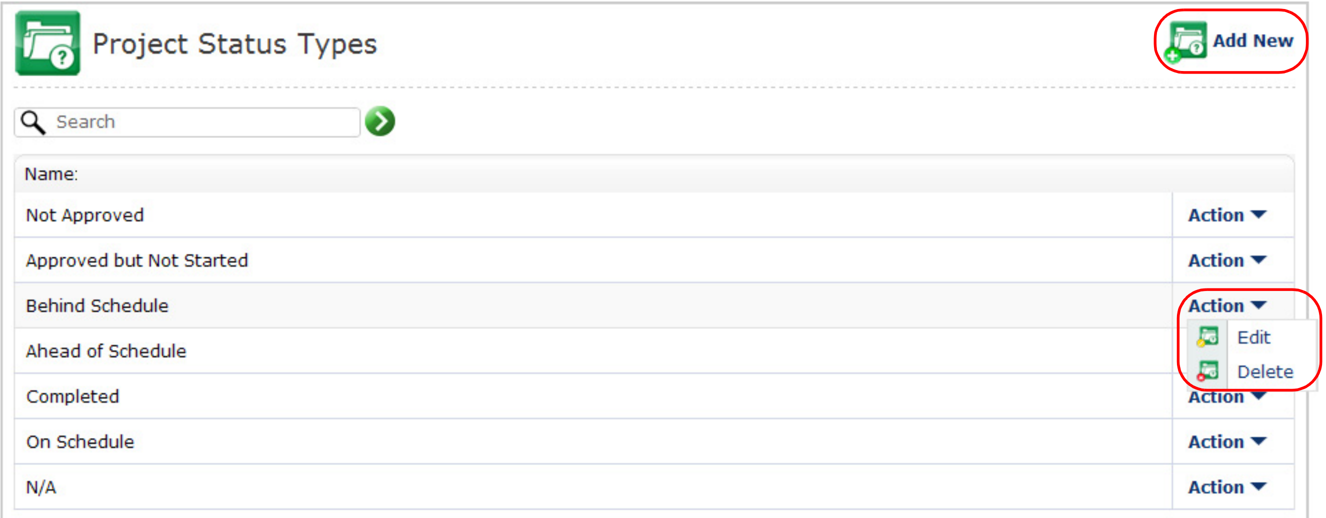
STEPS

Administration Menu



1. From the Menu bar, select the **Administration** menu, **Initiative Status Types** command. This displays the Initiative Status Types page.

Initiative Status Types Page



2. Notice the following about the Initiative Status Types page:

- The page lists the Initiative Status Type records set up in the application; the page has the basic features of a record list.
- The predefined records are: Not approved, Approved by Not Started, On-Track, Behind Schedule, Ahead of Schedule, Completed and N/A.
- The actions available on the page are Add New, Edit, and Delete.

3. Do any of the following:

- To add a new record, click the **Add New** link. See *Add a New Initiative Status Type* on page 64.
- To view or edit the details for a record, click the **name** of the Initiative Status Type or select the row **Actions** menu, **Edit** command for the Initiative Status Type to view or edit. See *Edit an Initiative Status Type* on page 66.
- To delete a record, select the row **Actions** menu, **Delete** command for the Initiative Status Type to delete. See *Delete an Initiative Status Type* on page 68.
- To close the record list page, select a different command from the Menu bar.

Add a New Initiative Status Type

Purpose

Use the steps in this section to set up new Initiative Status Type records in the InsightVision application.

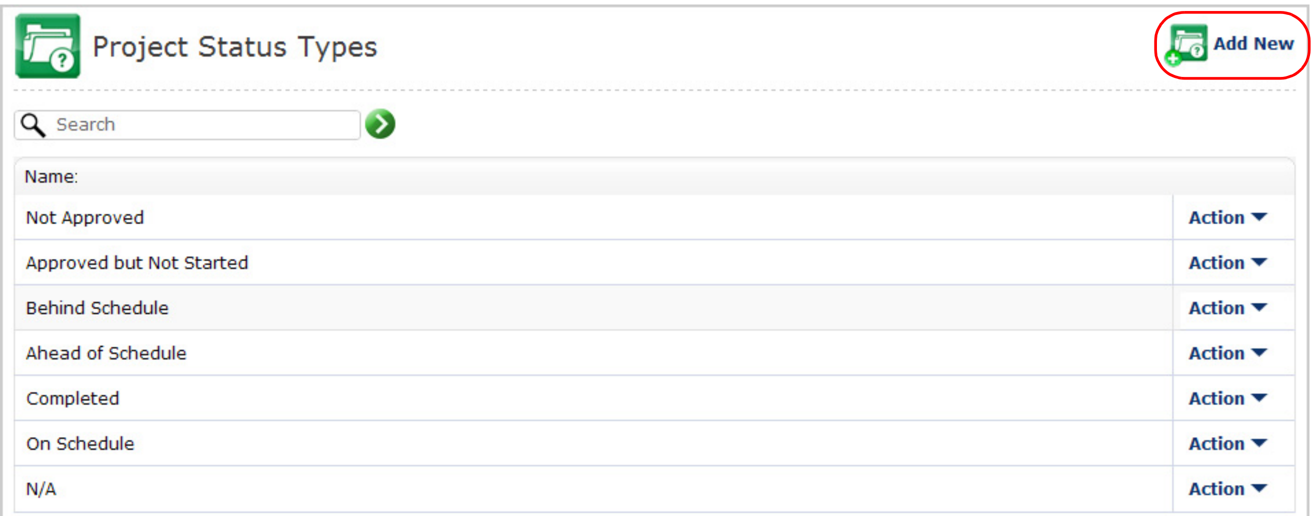
NOTES

- New Initiative Status Types will be selectable in the Edit Initiative screen once they have been saved.

STEPS

1. From the Menu bar, select the **Administration** menu, **Initiative Status Types** command. This displays the Initiative Status Types page.

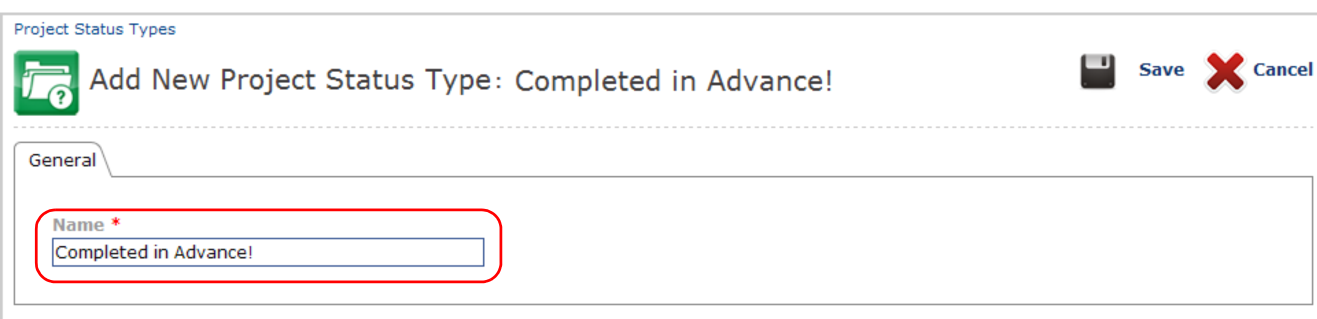
Initiative Status Types Page



NOTE: *For more information about the Initiative Status Types page, see View the Initiative Status Types List on page 62.*

2. Click the **Add New** link. This displays the Add New Initiative Status Type page.

Add New Initiative Status Type Page, General Tab



3. In the **Name** field, type up to 180 characters for the name of the new status type.
4. To save the new Initiative Status Type record, click the **Save** link. (Depending on the application settings, either the page title changes from Add New Initiative Status Type to Edit Initiative Status Type or the page closes.)

   NOTE: *To optionally close the page without saving the new Initiative Status Type, click the Cancel link.*
5. If necessary, click either the **Cancel** link or the **Initiative Status Types** link (above the page icon and title) to close the New Initiative Status Type page and return to the Initiative Status Type list page. The new Initiative Status Type appears in the record list.

Edit an Initiative Status Type

Purpose

Use the steps in this section to change the name of an Initiative Status Type record.

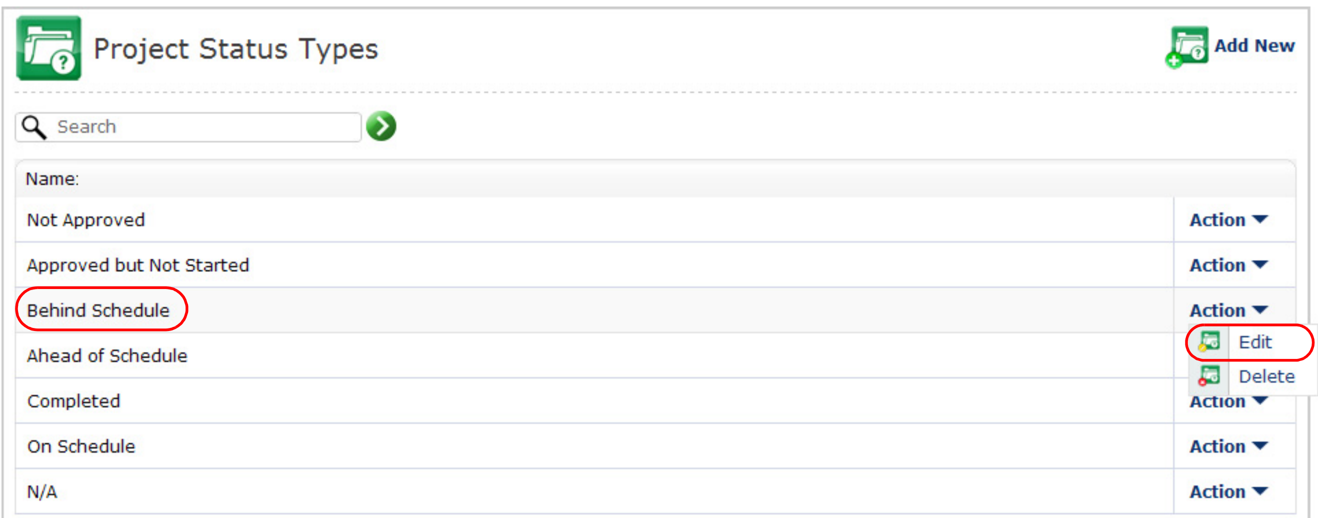
NOTES

- Changes made to the name of an Initiative Status Type automatically update anywhere the Initiative Status Type is being used in the application.

STEPS

1. From the Menu bar, select the **Administration** menu, **Initiative Status Types** command. This displays the Initiative Status Types page.

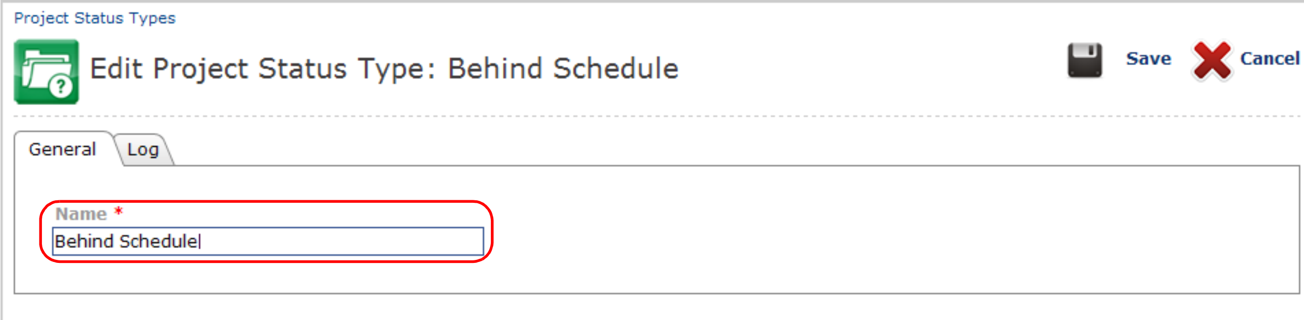
Initiative Status Types Page



NOTE: *For more information about the Initiative Status Types page, see* *View the Initiative Status Types List on page 62.*

2. Click the **name** of the Initiative Status Type or select the row **Actions** menu, **Edit** command for the Initiative Status Type to edit. This displays the Edit Initiative Status Types page.

Initiative Status Types Page



3. Change the **Name** as necessary and then click the **Save** link. For details, refer to the steps in the *Add a New Initiative Status Type* section. Begin with Step 3. on page 65 and follow the steps through to the end.

Delete an Initiative Status Type

Purpose

Use the steps in this section to delete an Initiative Status Type record from the InsightVision application.

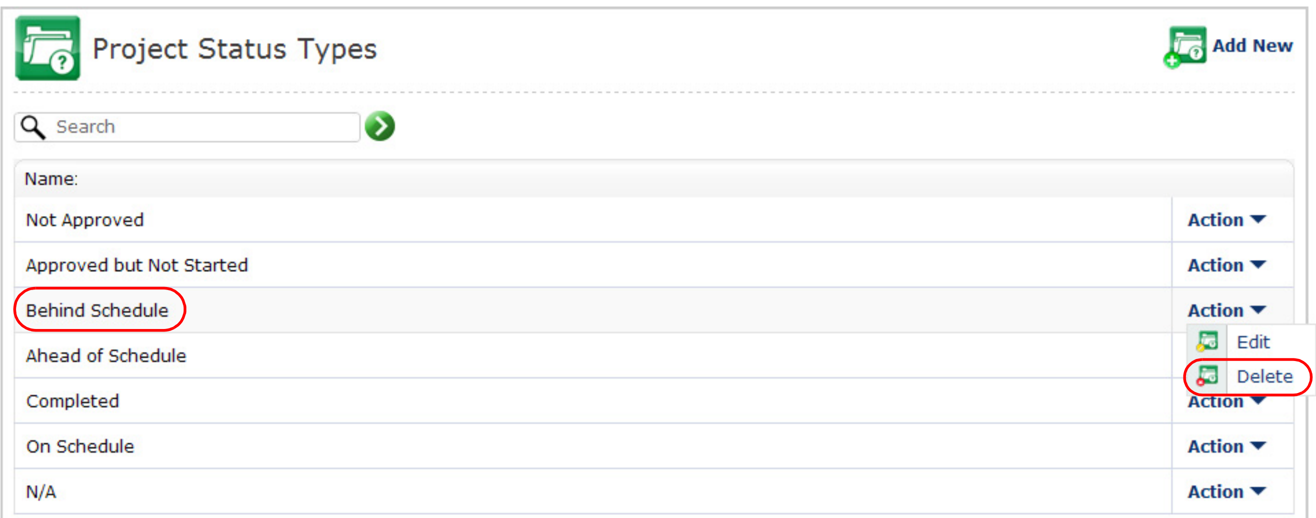
NOTES

- If an Initiative Status Type is currently assigned to an Initiative or task that Initiative or task's status will be erased.

STEPS

1. From the Menu bar, select the **Administration** menu, **Initiative Status Types** command.
   This displays the Initiative Status Types page.

   Initiative Status Types Page

   NOTE: *For more information about the Initiative Status Types page, see View the Initiative Status Types List on page 62.*

2. Select the row **Actions** menu, **Delete** command for the Initiative Status Type to delete.
   This displays a confirmation message.

3. Click the **OK** button to delete the Initiative Status Type. The Initiative Status Type no longer appears in the record list.

   NOTE: *To optionally keep the Initiative Status Type, click the Cancel button.*

Chapter 10: Initiative (and Task) Document Types

Introduction

Initiative Document Types are assigned to files that are associated with Initiative and Task records and are used to identify the type or content of the associated files on the Initiative Presentation view, as shown below. This information is used for custom reporting purposes.

This chapter includes the following sections for maintaining Initiative (and Task) Document Types in the InsightVision application.

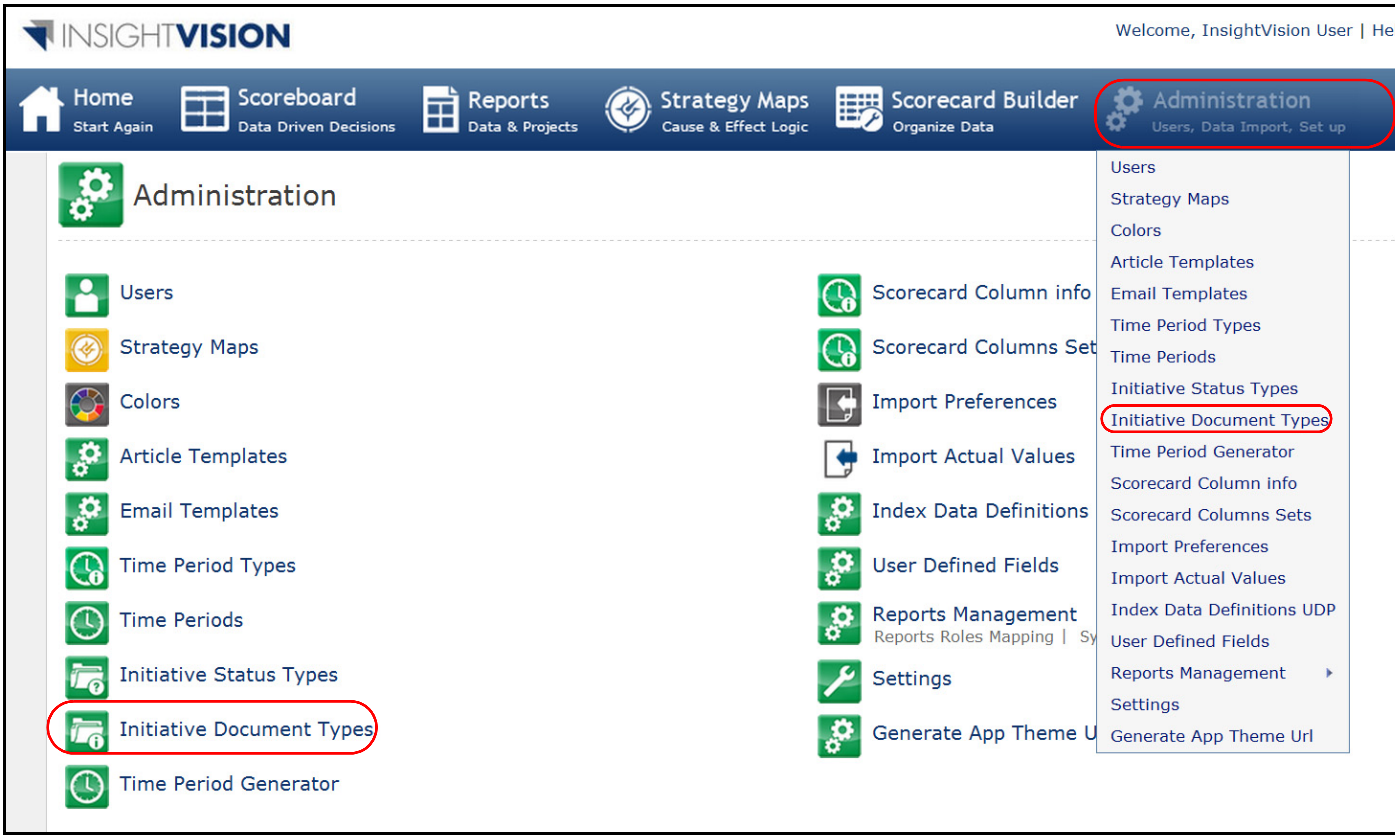
View the Initiative Document Types List

Purpose

Use the steps in this section to view the Initiative Document Types set up in the InsightVision application.

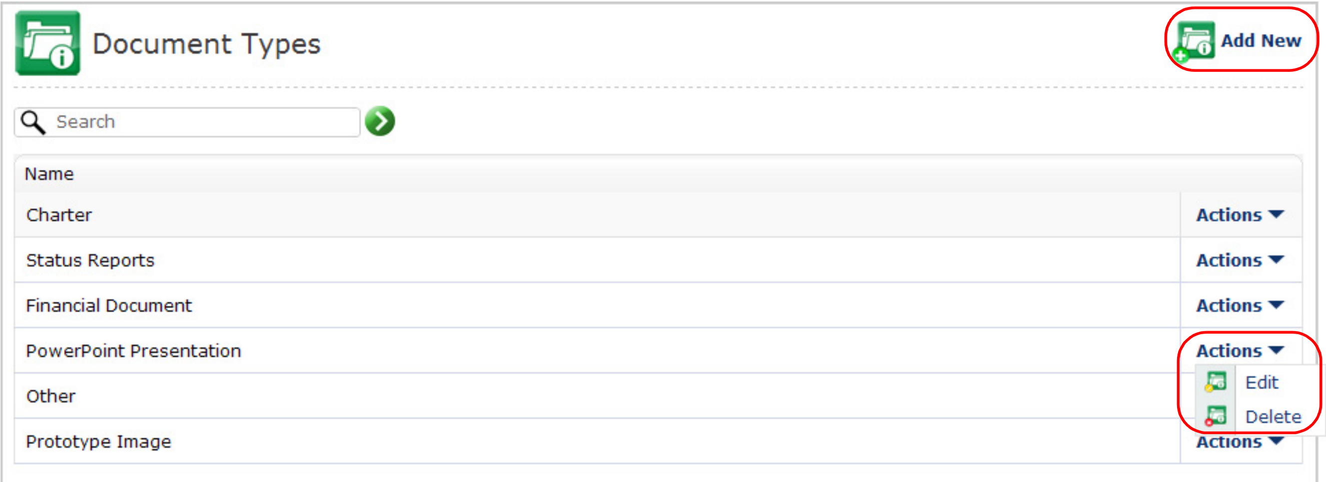
STEPS

Administration Menu



1. From the Menu bar, select the **Administration** menu, **Initiative Document Types** command.
This displays the Initiative Document Types page.

Initiative Document Types Page



2. Notice the following about the Initiative Document Types page:
   - The predefined records are: Charter, Status Reports, Financial Document, PowerPoint Presentation, and Other.
   - The actions available on the page are Add New, Edit, and Delete.
3. Do any of the following:
   - To add a new record, click the **Add New** link. See *Add a New Initiative Document Type* on page 72.
   - To view or edit the details for a record, click the **name** of the Initiative document type or select the row **Actions** menu, **Edit** command for the Initiative document type to view or edit. See *Edit an Initiative Document Type* on page 74.
   - To delete a record, select the row **Actions** menu, **Delete** command for the Initiative document type to delete. See *Delete an Initiative Document Type* on page 76.
   - To close the record list page, select a different command from the Menu bar.

Add a New Initiative Document Type

Purpose

Use the steps in this section to set up new Initiative Document Type records in the InsightVision application.

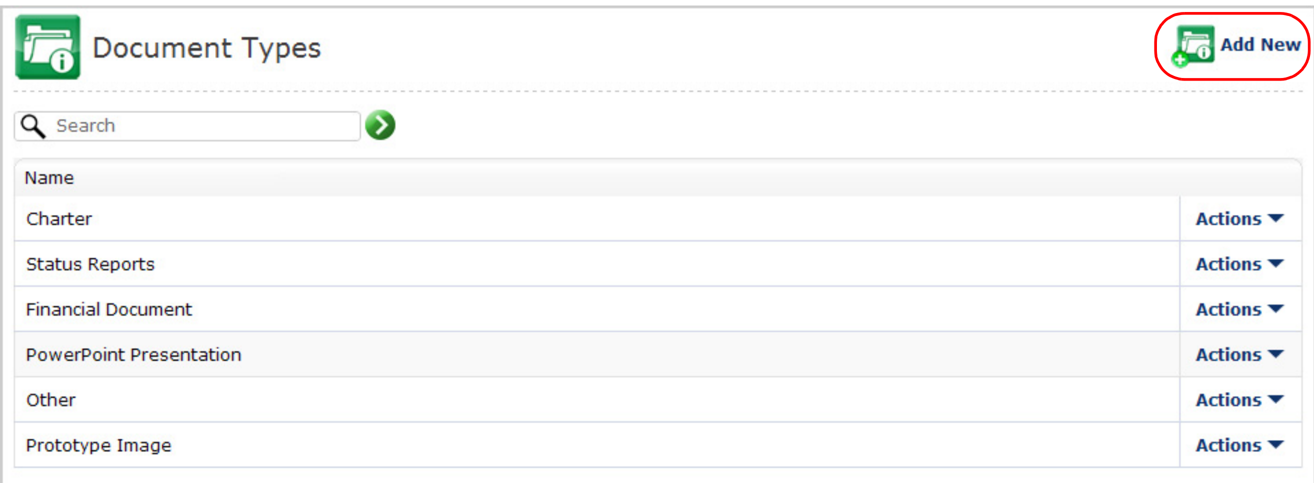
NOTES

- New Initiative Document Types will be available in the Edit Initiative screen once they are saved.

STEPS

1. From the Menu bar, select the **Administration** menu, **Initiative Document Types** command. This displays the Initiative Document Types page.

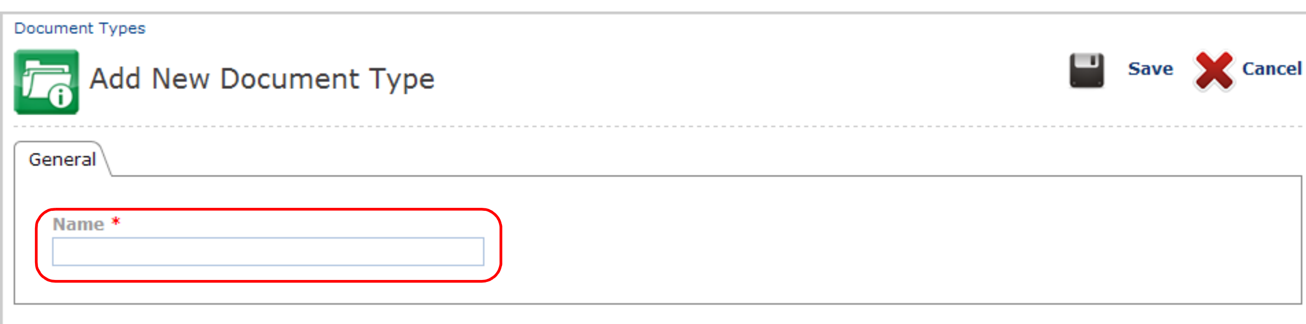
Initiative Document Types Page



NOTE: For more information about the Initiative Document Types page, see View the Initiative Document Types List on page 70.

2. Click the **Add New** link. This displays the Add New Initiative Document Type page.

Add New Initiative Document Type Page, General Tab



3. In the **Name** field, type up to 180 characters for the name of the new document type.

4. When you are finished, click the **Save** link to save the new Initiative document type record. (Depending on the application settings, either the page title changes from Add New Initiative Document Type to Edit Initiative Document Type or the page closes.)
5. If necessary, click either the **Cancel** link or the **Initiative Document Types** link (above the page icon and title) to close the Edit Initiative Document Type page and return to the Initiative Document Type list page. The new Initiative document type appears in the record list.

Edit an Initiative Document Type

Purpose

Use the steps in this section to change the name of an Initiative document type record.

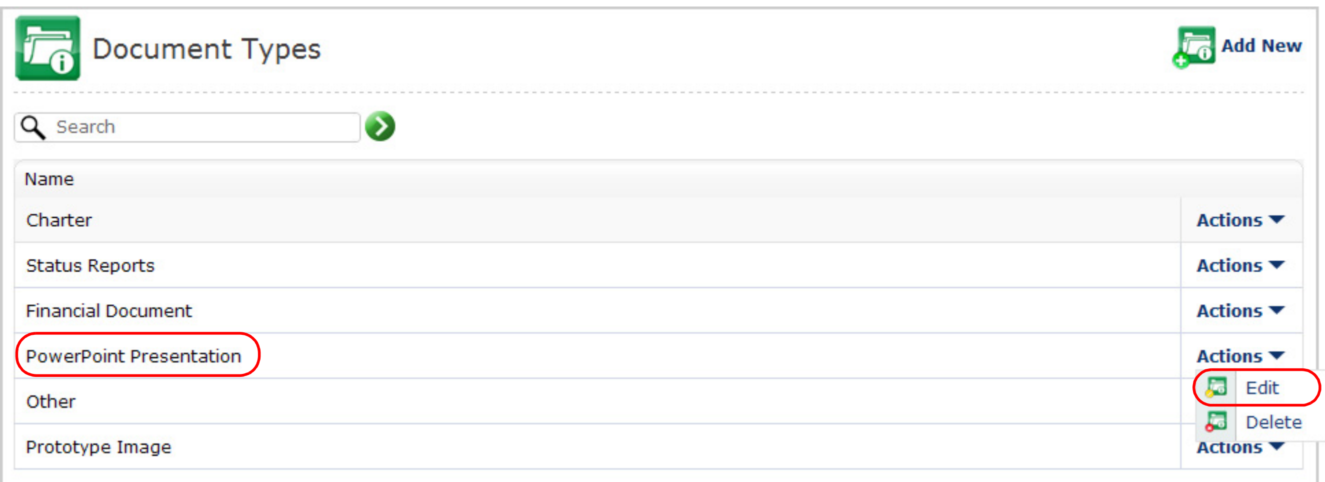
NOTES

- Changes made to the name of an Initiative document type automatically update anywhere the Initiative document type is being used in the application.

STEPS

1. From the Menu bar, select the **Administration** menu, **Initiative Document Types** command. This displays the Initiative Document Types page.

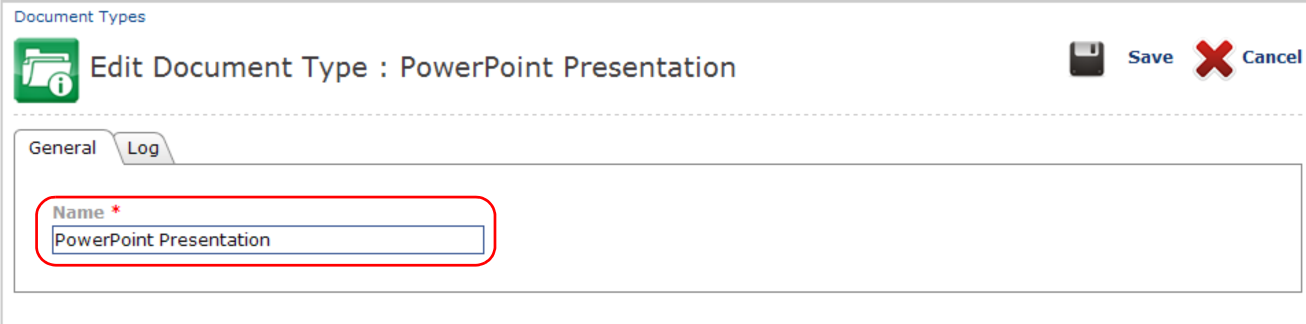
Initiative Document Types Page



***NOTE:** For more information about the Initiative Document Types page, see View the Initiative Document Types List on page 70.*

2. Click the **name** of the Initiative document type or select the row **Actions** menu, **Edit** command for the Initiative document type to edit. This displays the Edit Initiative Status Types page.

Initiative Document Types Page



3. Change the **Name** as necessary and then click the **Save** link. For details, refer to the steps in the *Add a New Initiative Document Type* section. Begin with Step 3. on page 72 and follow the steps through to the end.

Delete an Initiative Document Type

Purpose

Use the steps in this section to delete an Initiative document type record from the InsightVision application.

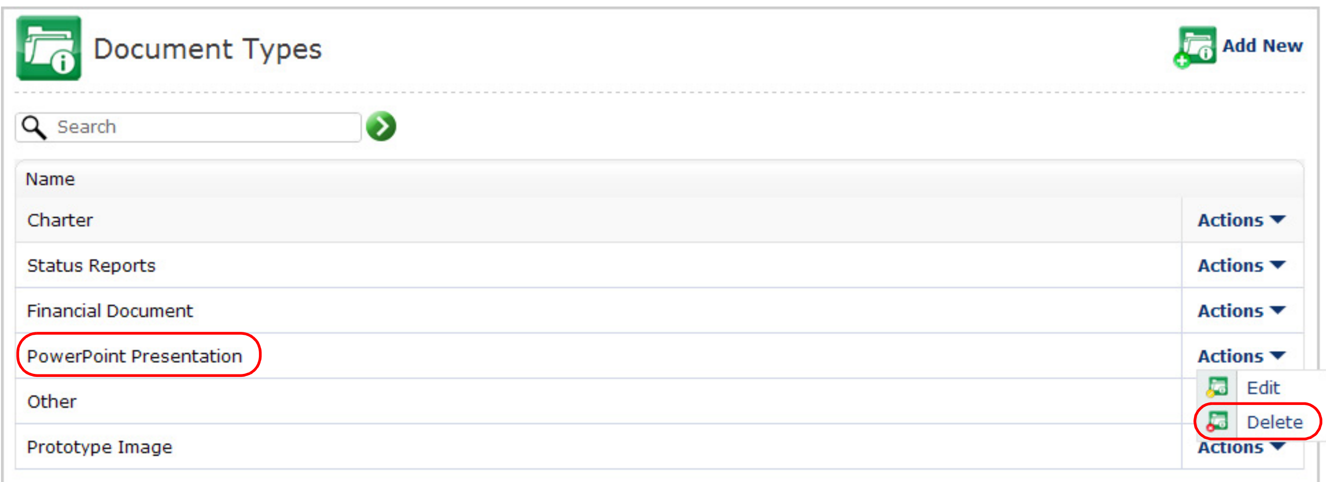
NOTES

- If an Initiative document type is currently being used by an Initiative document the document type will be erased from that document.

STEPS

1. From the Menu bar, select the **Administration** menu, **Initiative Document Types** command. This displays the Initiative Document Types page.

Initiative Document Types Page



__NOTE:__ For more information about the Initiative Document Types page, see View the Initiative Document Types List on page 70.

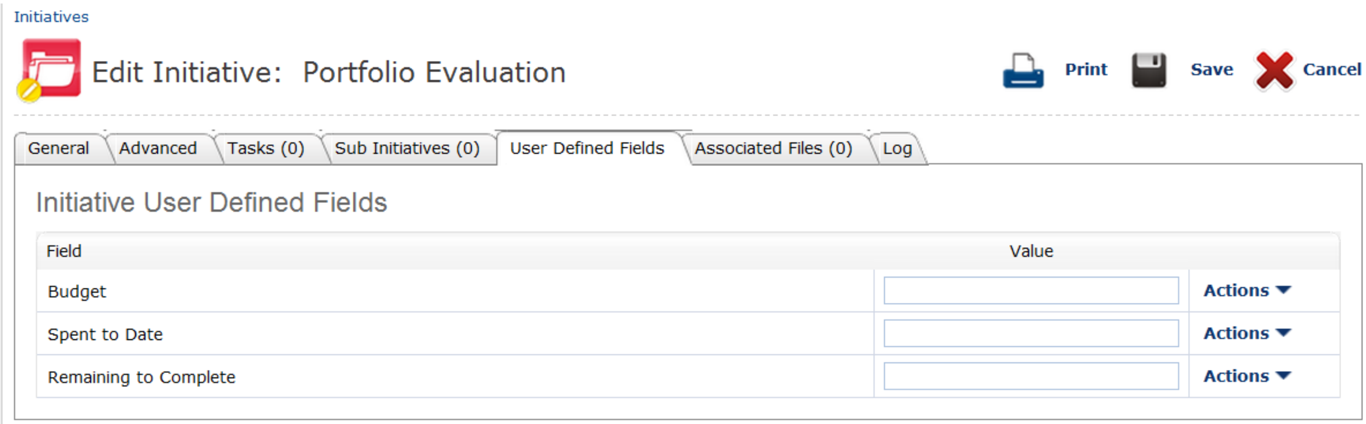
2. Select the row **Actions** menu, **Delete** command for the Initiative document type to delete. This displays a confirmation message.
3. Click the **OK** button to delete the Initiative document type. The Initiative document type no longer appears in the record list.

   __NOTE:__ To optionally keep the Initiative document type, click the Cancel button.

Chapter 11: Initiative User-Defined Fields

Introduction

User-Defined Fields are added to Initiative records and provide a method for entering customized information for Initiatives. The User-Defined Fields administration function lets you add special fields for Initiative records. Currently, the User-Defined Fields are only used in customized reporting or for viewing by the Scorecard Builders. And the current User-Defined Fields are short text fields. They can contain values (such as budget), but it would take custom reporting to do any calculations based on those fields. These fields could be used to create special categories for Initiatives (such as “Recommended New Initiatives”) or storing information than might be needed for automated integration with a project management system. See the example below.



This chapter includes the following sections for maintaining User Defined Fields in the InsightVision application.

- *View the User-Defined Fields List* on page 78
- *Add a New User-Defined Field* on page 80
- *Edit a User-Defined Field* on page 82
- *Delete a User-Defined Field* on page 84

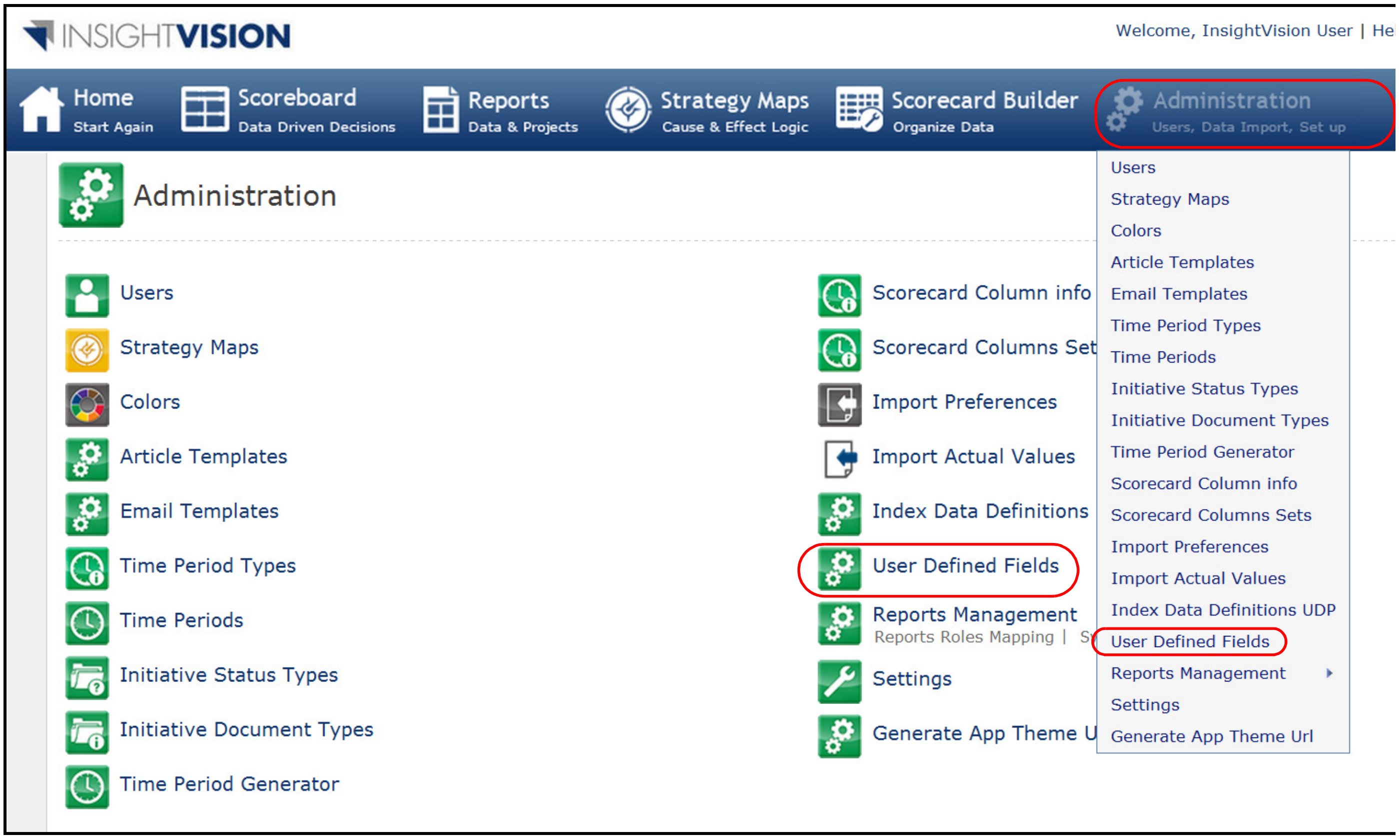
View the User-Defined Fields List

Purpose

Use the steps in this section to view the User-Defined Fields set up in the InsightVision application.

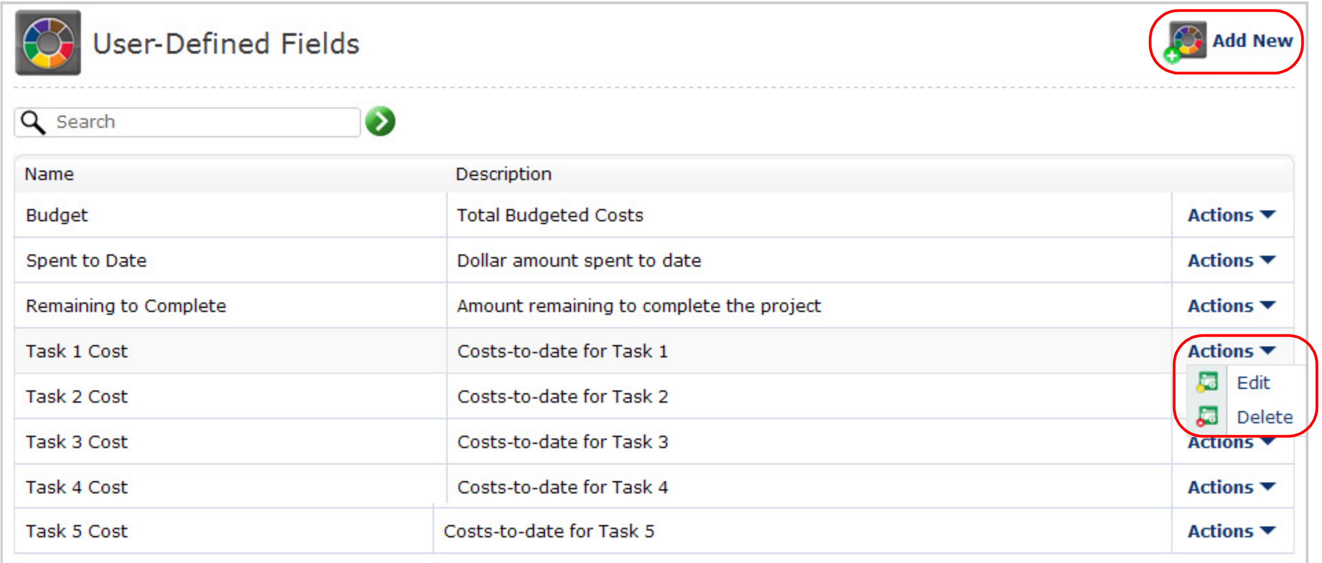
STEPS

Administration Menu



1. From the Menu bar, select the **Administration** menu, **User-Defined Fields** command.
This displays the User-Defined Fields page.

User-Defined Fields Page



2. Notice the following about the User-Defined Fields page:

- The predefined records are: Budget, Spent to Date, and Remaining to Complete.
- The actions available on the page are Add New, Edit, and Delete.

3. Do any of the following:

- To add a new record, click the **Add New** link. See *Add a New User-Defined Field* on page 80.
- To view or edit the details for a record, click the **name** of the User-Defined Field or select the row **Actions** menu, **Edit** command for the User-Defined Field to view or edit.
- To delete a record, select the row **Actions** menu, **Delete** command for the User-Defined Field to delete.
- To close the record list page, select a different command from the Menu bar.

Add a New User-Defined Field

Purpose

Use the steps in this section to set up new User-Defined Field records in the InsightVision application.

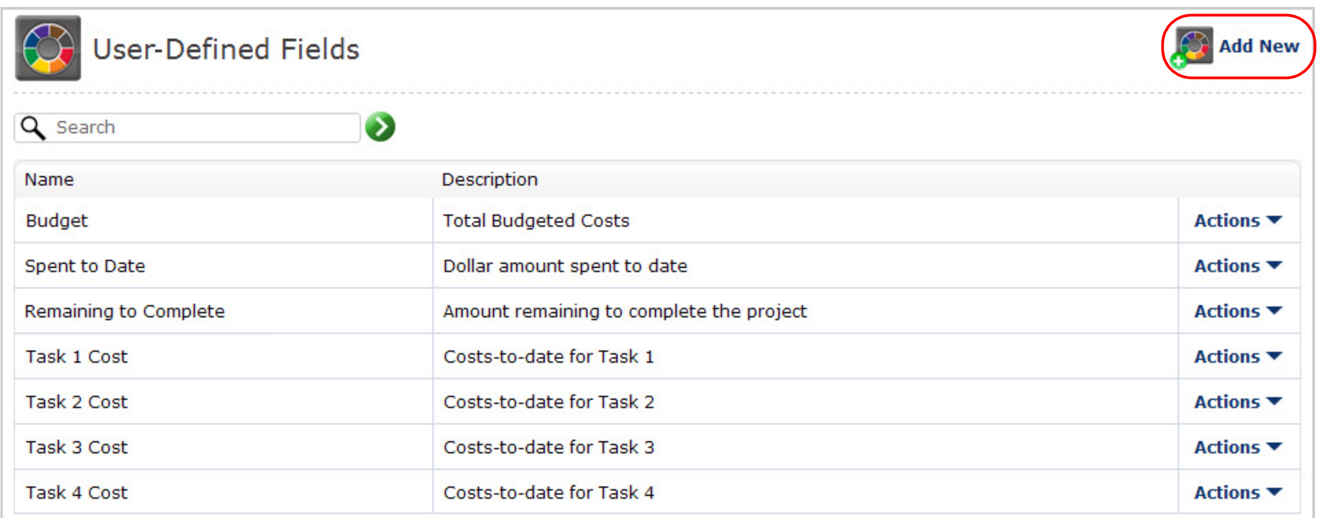
NOTES

- New User-Defined Fields will appear in the Edit Initiative screen once they have been saved.

STEPS

1. From the Menu bar, select the **Administration** menu, **User-Defined Fields** command. This displays the User-Defined Fields page.

User-Defined Fields Page

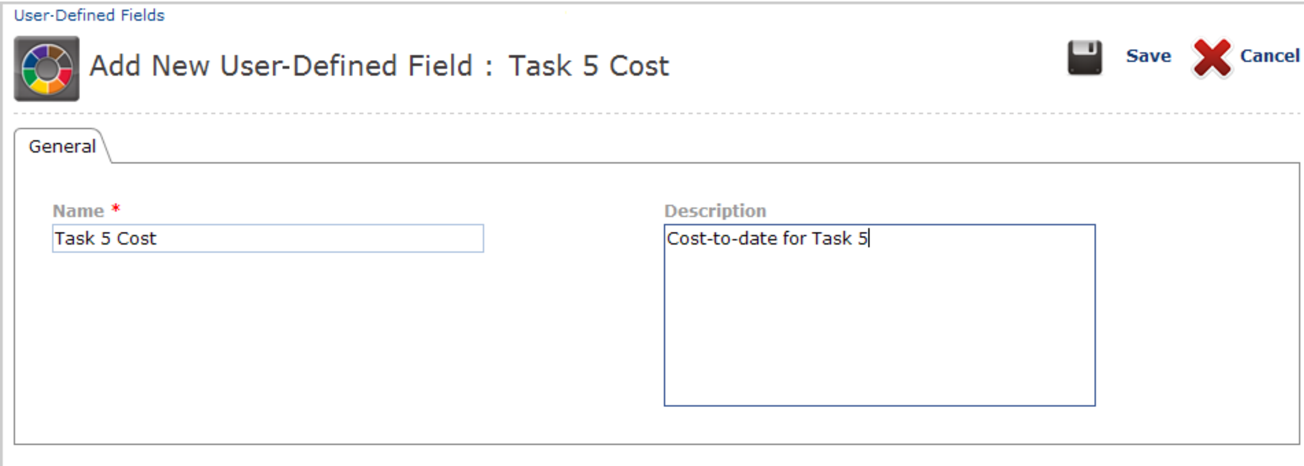


Name	Description	
Budget	Total Budgeted Costs	Actions
Spent to Date	Dollar amount spent to date	Actions
Remaining to Complete	Amount remaining to complete the project	Actions
Task 1 Cost	Costs-to-date for Task 1	Actions
Task 2 Cost	Costs-to-date for Task 2	Actions
Task 3 Cost	Costs-to-date for Task 3	Actions
Task 4 Cost	Costs-to-date for Task 4	Actions

NOTE: *For more information about the* User-Defined Field *page, see* *View the User-Defined Fields List on page 78.*

2. Click the **Add New** link. This displays the Add New User-Defined Fields page.

Add New User-Defined Field Page, General Tab



3. Complete the following fields on the General tabbed page:

Name	Type up to 20 characters for the name of the user-defined field.
Description	Type up to 250 characters for a description of the user-defined field.

4. To save the new time period record, click the **Save** link. (Depending on the application settings, either the page title changes from Add New Time Period to Edit Time Period or the page closes.)

   NOTE: *To optionally close the page without saving the new time period type, click the Cancel link.*

5. If necessary, click either the **Cancel** link or the **Time Periods** link (above the page icon and title) to close the Edit Time Period page and return to the Time Period list page. The new time period appears in the record list.

Edit a User-Defined Field

Purpose

Use the steps in this section to change the name of a User-Defined Field record.

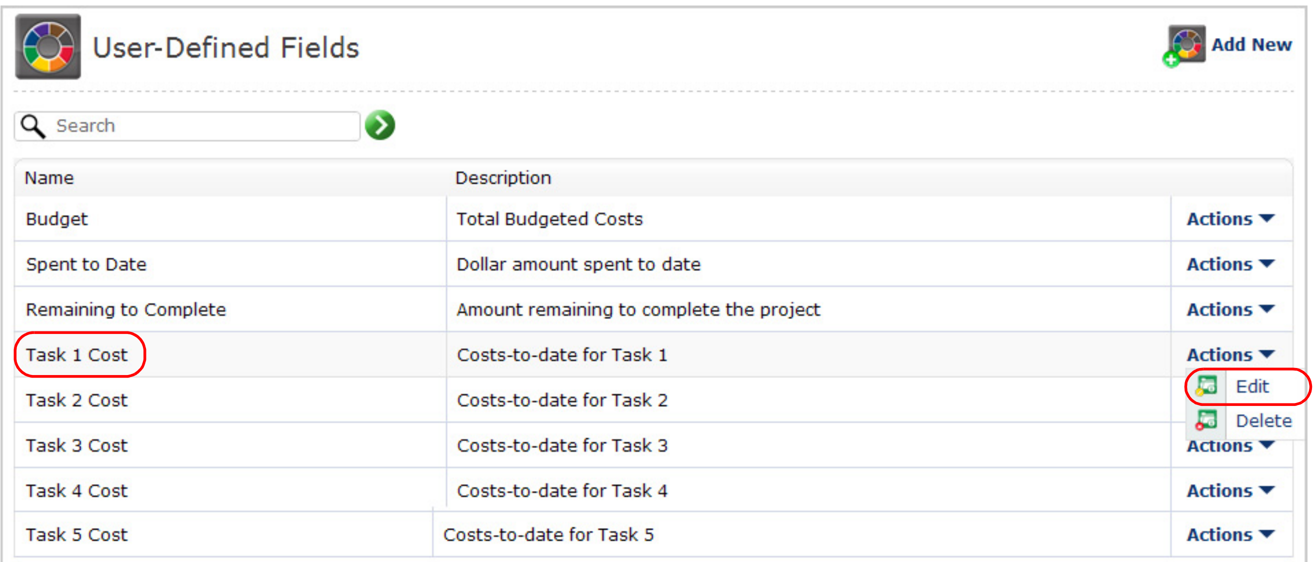
NOTES

- Changes made to the name of a User-Defined Field automatically update anywhere the User-Defined Field is being used in the application.

STEPS

1. From the Menu bar, select the **Administration** menu, **User-Defined Fields** command. This displays the User-Defined Fields page.

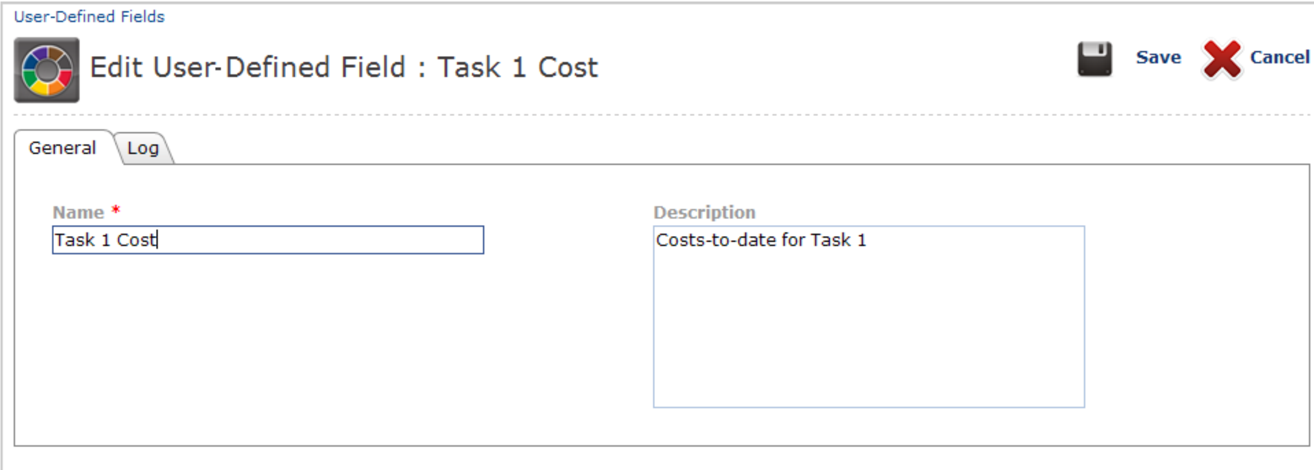
User-Defined Fields Page



NOTE: *For more information about the User-Defined Fields page, see* *View the User-Defined Fields List on page 78.*

2. Click the **name** of the User-Defined Field or select the row **Actions** menu, **Edit** command for the User-Defined Field to edit. This displays the Edit User-Defined Fields page.

User-Defined Fields Page



3. Change the fields as necessary and then click the **Save** link. For details, refer to the steps in the *Add a New User-Defined Field* section. Begin with Step 3. on page 81 and follow the steps through to the end.

NOTE: *To optionally close the page without saving the changes, click the Cancel link.*

Delete a User-Defined Field

Purpose

Use the steps in this section to delete a User-Defined Field record from the InsightVision application.

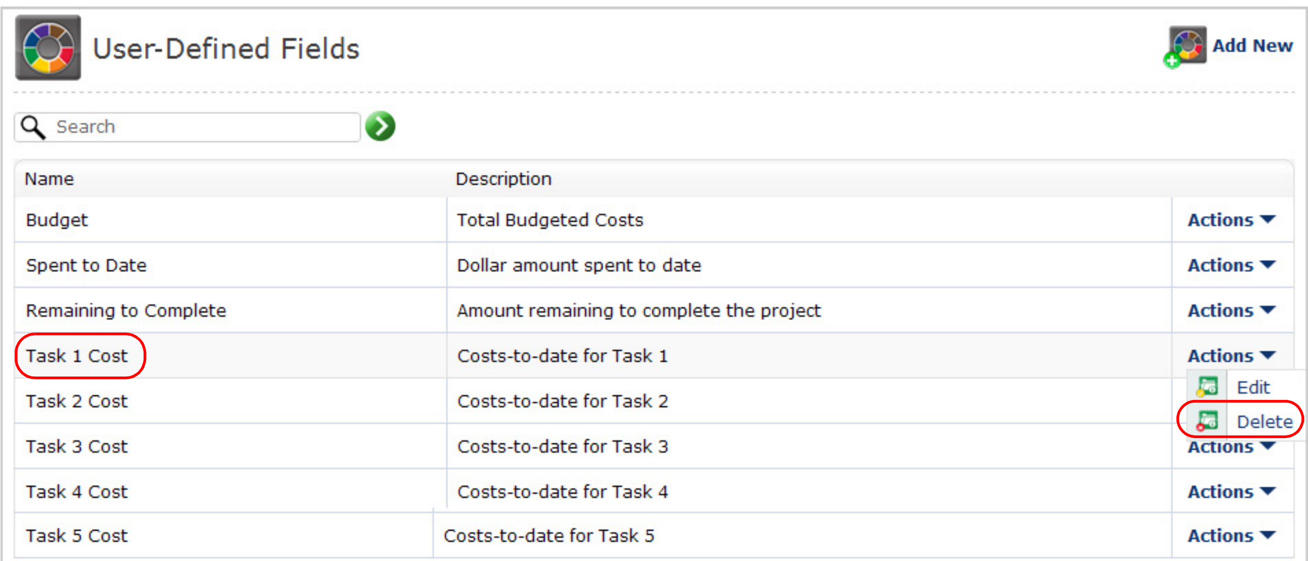
NOTES

- If a User Defined Field is currently being used by an Initiative or Task, the value will be erased along with the User-Defined Field itself.

STEPS

1. From the Menu bar, select the **Administration** menu, **User-Defined Fields** command.
This displays the User-Defined Fields page.

User-Defined Fields Page



NOTE: *For more information about the User-Defined Fields page, see* *View the User-Defined Fields List on page 78.*

2. Select the row **Actions** menu, **Delete** command for the User-Defined Field to delete. This displays a confirmation message.

3. Click the **OK** button to delete the User-Defined Field. The User-Defined Field no longer appears in the record list.

NOTE: *To optionally keep the* User-Defined Field*, click the Cancel button.*

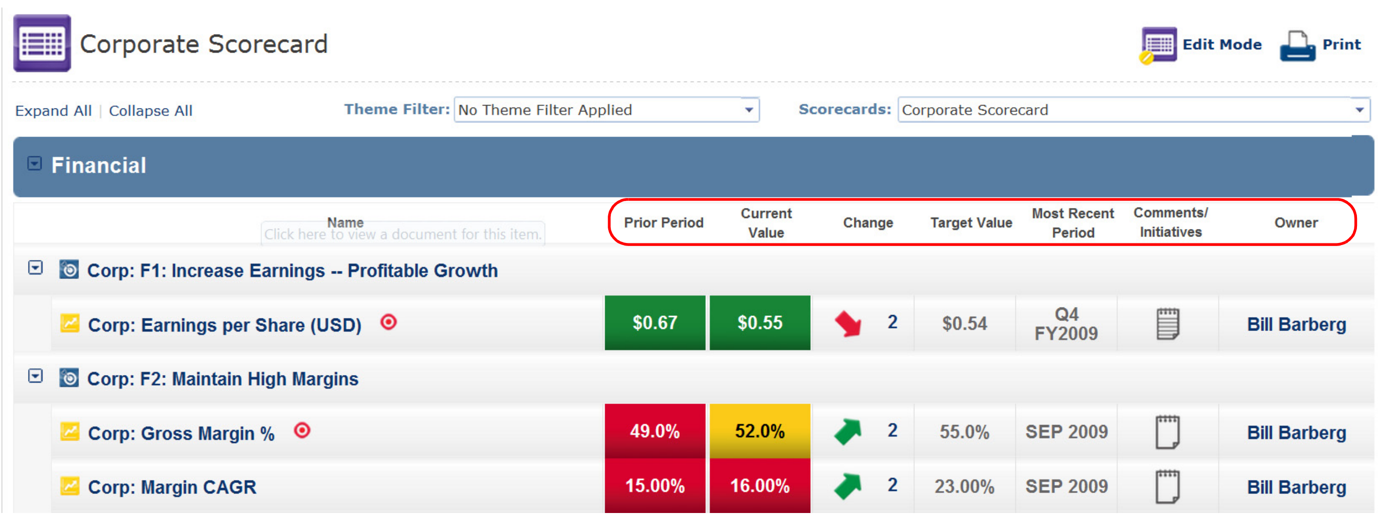
Chapter 12: Scorecard Column Information

Introduction

Scorecard Column Names and Column Sets are used in the InsightVision application to define the columns that appear on the Scoreboard page when a Scorecard is displayed.

The application has several predefined columns with names that describe the column contents. Column Sets include a group of columns (and their order) along with other settings described in the next chapter.

An Administrator cannot add new columns that are not currently part of the application, but the Administrator can change the names that appear on the top of each column and the description that appears when the mouse hovers over that column heading. If, for example, an organization does not like the term “Target” for what InsightVision calls the Target internally, they can change the display column heading to be something different—such as “Goal Value”—and also modify the description.



This chapter includes the following sections for maintaining Scorecard Column Information in the InsightVision application.

- *View the Scorecard Columns List* on page 86
- *Edit Information for a Scorecard Column* on page 89

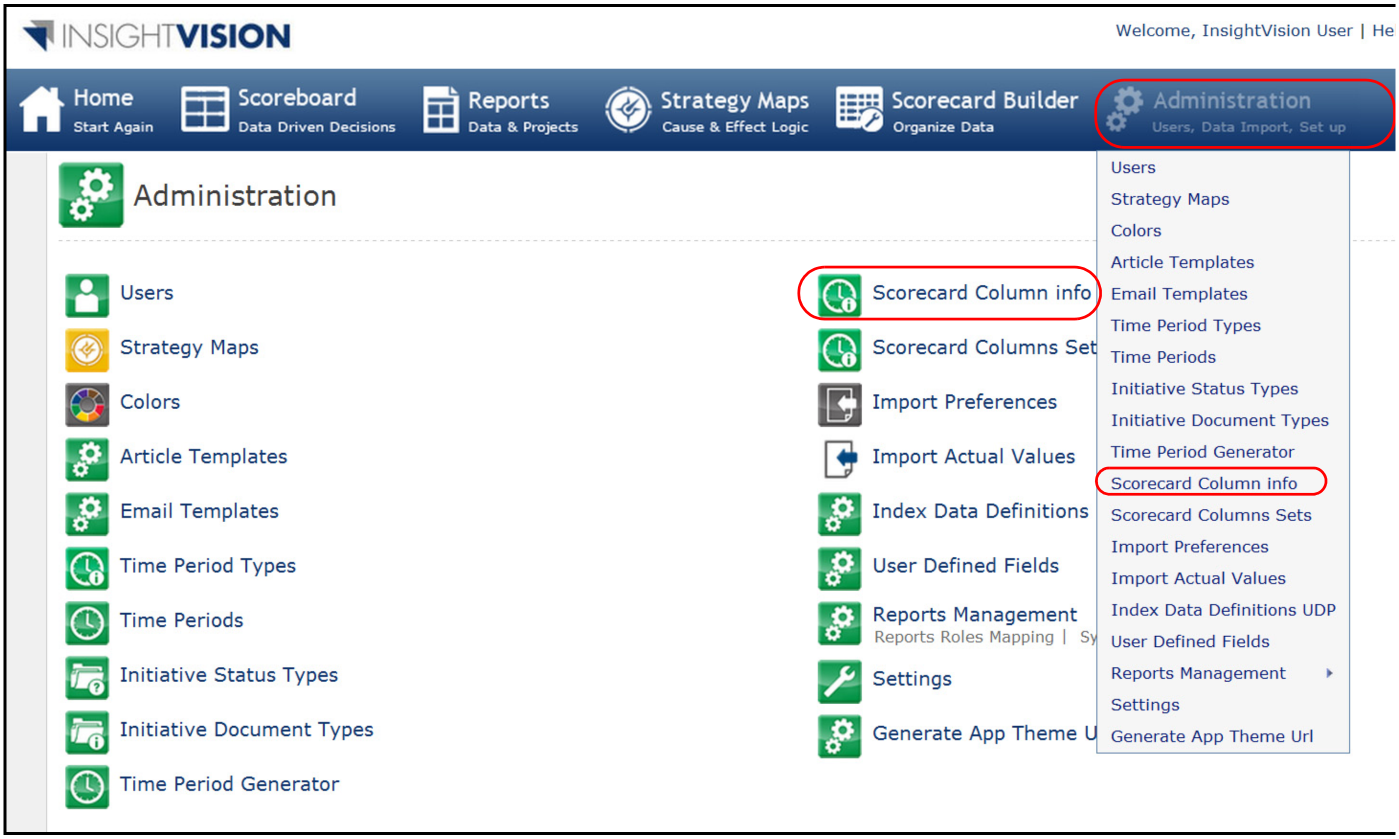
View the Scorecard Columns List

Purpose

Use the steps in this section to view the Scorecard Column records set up in the InsightVision application.

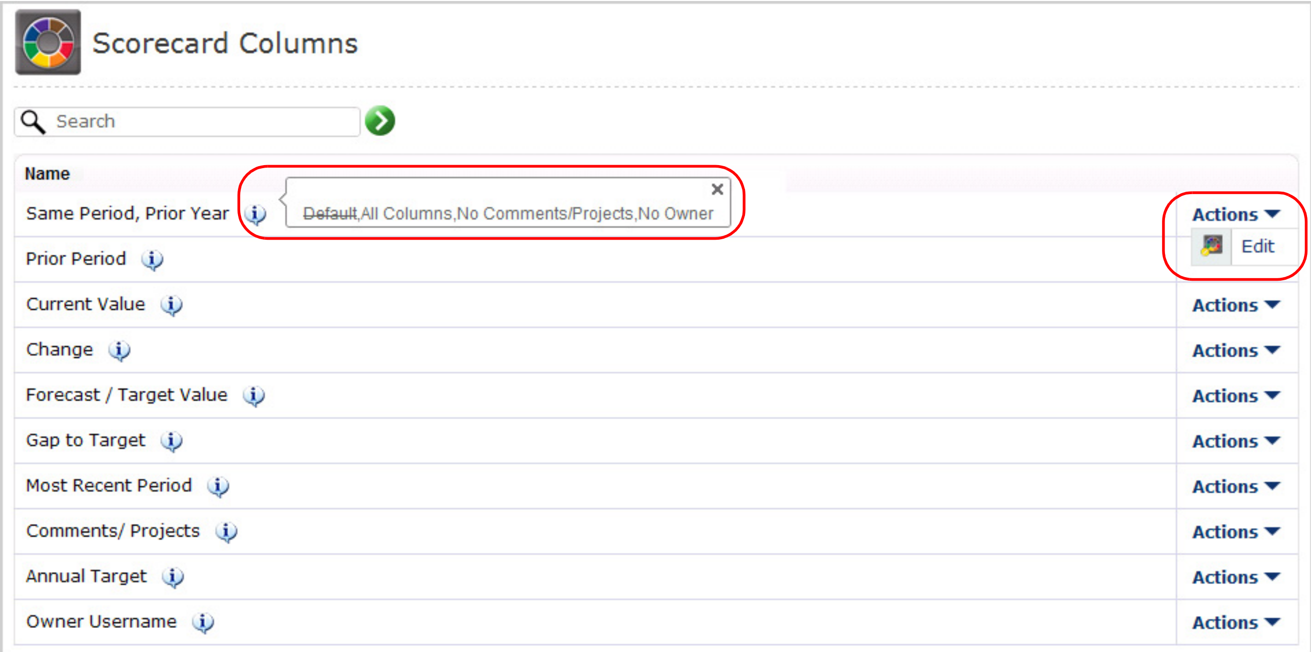
STEPS

Administration Menu



1. From the Menu bar, select the **Administration** menu, **Scorecard Column Info** command.
   This displays the Scorecard Columns page.

Scorecard Columns Page



2. Notice the following about the Scorecard Columns page:

- There is an Information icon next to each column name; pointing the mouse cursor at, or clicking, the icon displays a list of the Column Sets that include this column. (See ***Chapter 13: Scorecard Column Sets*** on page 93.)

  NOTE: *To close the list of column sets, click the Close (X) icon that is in the top, right corner of the information list box.*

- The action available on the page is Edit.
- The predefined Scorecard Columns include:
  - » **Same Period Prior Year —** Actual Value data entered for the same time period as the most recent time period, but one year previous to the current year of the most recent time period; appears with a color band around it.
  - » **Prior Period —** Actual Value data entered for the period prior to the most recent time period; appears with a color band around it.
  - » **Current Value —** Actual Value data entered for the most recent time period; appears with a color band around it.
  - » **Change —** Trend (Polarity) Indicator Arrow icon (green, red, black, or none) that indicates the direction of change (up, down, or no change) in the Actual Value from the prior period to the current period along with a number that represents the number of most-current, consecutive time periods that the data has moved in the direction indicated (how long the trend has been continuing).

    NOTE: *The color of the indicator arrow varies based on if the up or down movement is desirable (positive) or undesirable (negative).*

  - » **Forecast/Target Value —** Forecast or Target data value entered for the most recent time period.
  - » **Gap to Target —** Plus (+) or Minus (-) icon (green, red, black, or none) that indicates if the difference between the Actual Value and the Target value has increased or decreased

number of most-current, consecutive time periods that the gap has moved in the direction indicated (how long the trend has been continuing). This column can be used instead of the Change column if the actual the change is less important than the change relative to the target. I.e. if most of the measures are Year-to-Date, they will almost all go up each month, so the Change field is meaningless.

» **Most Recent Period —** Name of the most-recent time period for which Actual Value (Current Value) data is entered; determines the dates displayed in the other columns (Same Period Prior Year, Prior Period, etc.).

» **Comments/Initiatives —** Comment icon that has a link for entering comments for a Current Actual Value; Initiatives icon that has a link for viewing Initiative information, if applicable.

» **Annual Target —** Target data value entered for the last period of the current year (based on the year of the Most Recent Period for which data is entered).

» **Owner —** Name of User assigned as Owner of the record; also, depending on the Administration Settings, may have a link to start the default e-mail application to send an e-mail message to the User.

3. Do either of the following:

- To view or edit the details for a record, click the **name** of the scorecard column or select the row **Actions** menu, **Edit** command for the record to view or edit. See *Edit Information for a Scorecard Column* on page 89.
- To close the record list page, select a different command from the Menu bar.

Edit Information for a Scorecard Column

Purpose

Use the steps in this section to change the name of a Scorecard Column record.

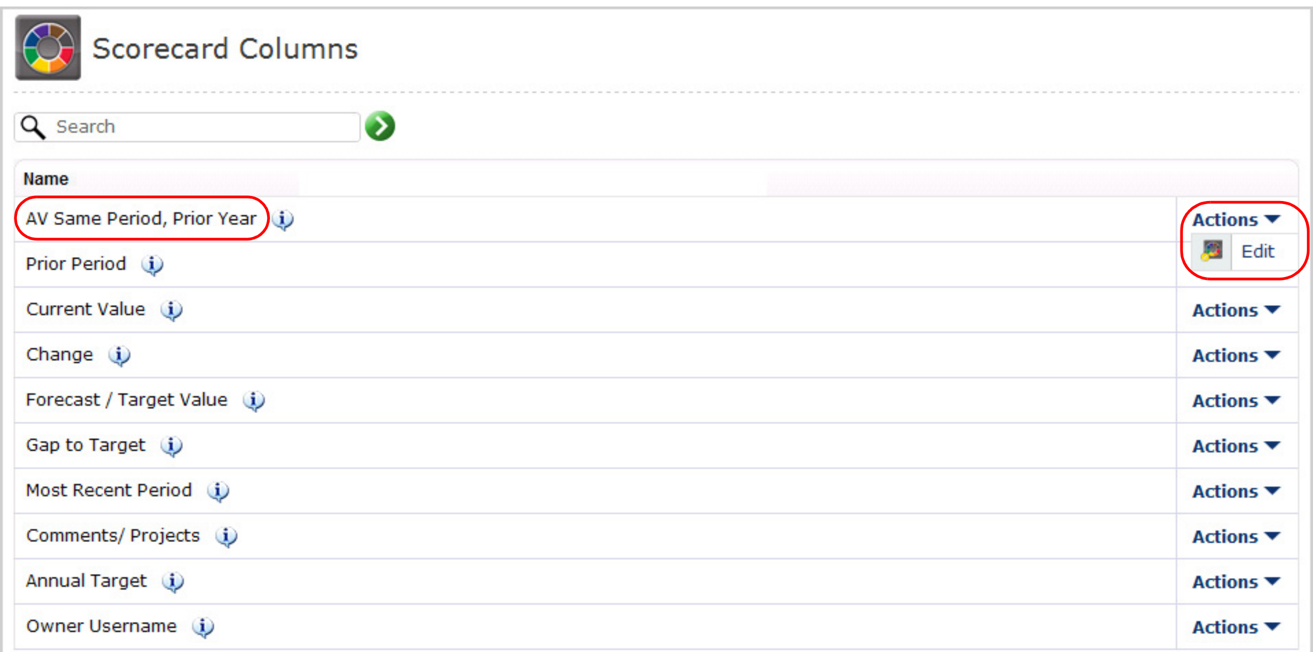
NOTES

- Changes made to the name of a Scorecard Column changes the name of the column when it appears on the Scoreboard page.

STEPS

1. From the Menu bar, select the **Administration** menu, **Scorecard Column Info** command. This displays the Scorecard Columns page.

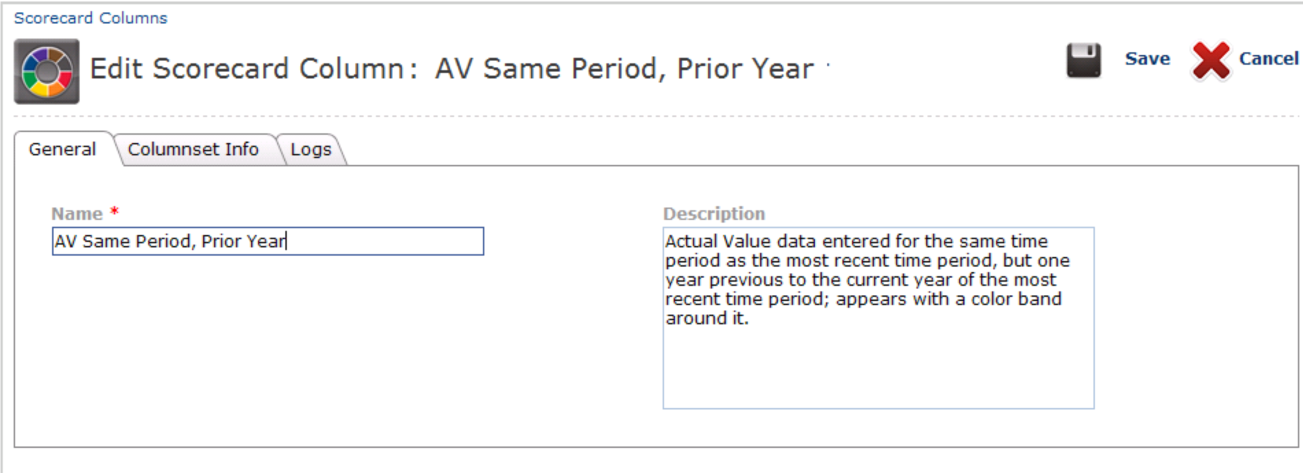
Scorecard Columns Page



__NOTE:__ For more information about the Scorecard Columns page, see *View the Scorecard Columns List on page 86.*

2. Click the **name** of the Scorecard Column or select the row **Actions** menu, **Edit** command for the Scorecard Column record to edit. This displays the Edit Scorecard Columns page.

Edit Scorecard Column Page, General Tab

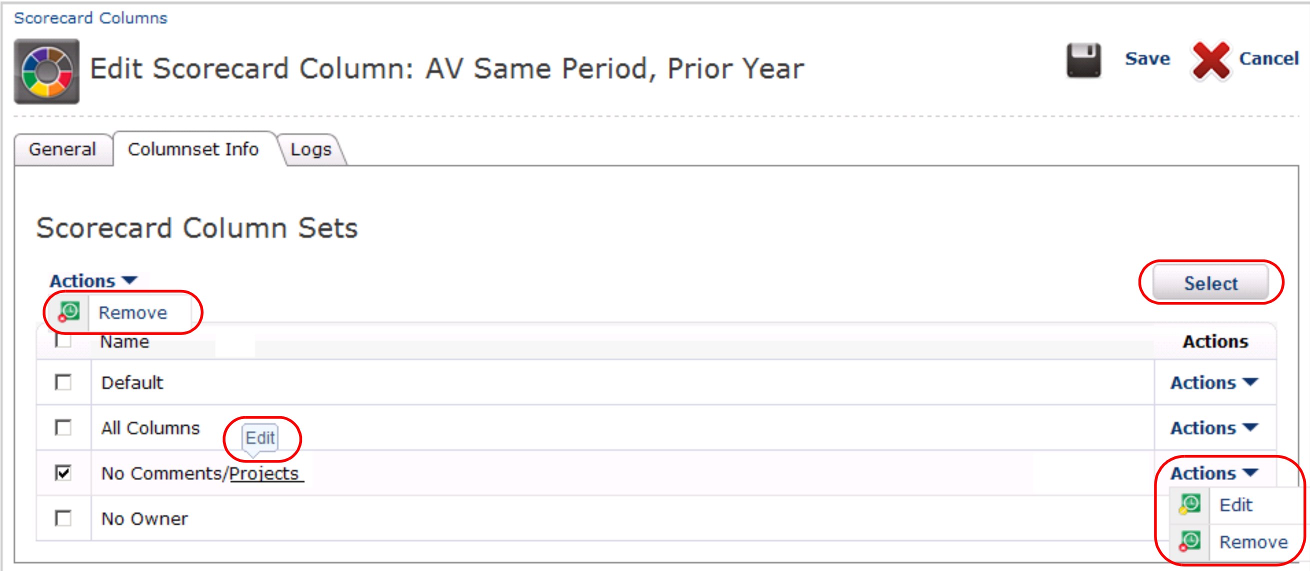


3. Optionally, change the following fields on the General tabbed page:

Name	Type up to 20 characters for a new name for the Scorecard column.
Description	Type up to 250 characters for a new description of the Scorecard column.

4. Optionally, click the Columnset Info tab to view or edit the Column Set(s) that include the column for display on the Scoreboard page.

Edit Scorecard Columns Page, Columnset Info Tab



a. Notice the following about the Columnset Info tabbed page:

- The actions available on the page are Select, Remove, and Edit.

b. Do any of the following:

- To add the scorecard column to a column set, click the **Select** button to open the Select Scorecard Column Sets selection box. In the selection box, select the checkbox for each scorecard column set in which to include the scorecard column and then click the **Select and Close** button. (See ***Chapter 13: Scorecard Column Sets*** on page 93.)
- To view or edit the details for a Column Set record, click the **name** of the column set or select the row **Actions** menu, **Edit** command for the record. This closes the Edit Scorecard Column page and opens the Edit Scorecard Column Sets page. See *Edit a Scorecard Column Set* on page 99.
- To remove the scorecard column from one column set, select the row **Actions** menu, **Remove** command for scorecard column set from which to remove the scorecard column.
- To remove the scorecard column from multiple column sets, select the checkbox for each column set from which to remove the scorecard column and then select the group **Actions** menu, **Remove** command.

5. When you are finished editing the record, click the **Save** link.

NOTE: *To optionally close the page without saving the changes, click either the Cancel link or the breadcrumb trail link (in the top, left corner of the page).*

6. If necessary, click either the **Cancel** link or the **Scorecard Columns** link (above the page icon and title) to close the Edit Scorecard Columns page and return to the Scorecard Columns list page.

NOTES:

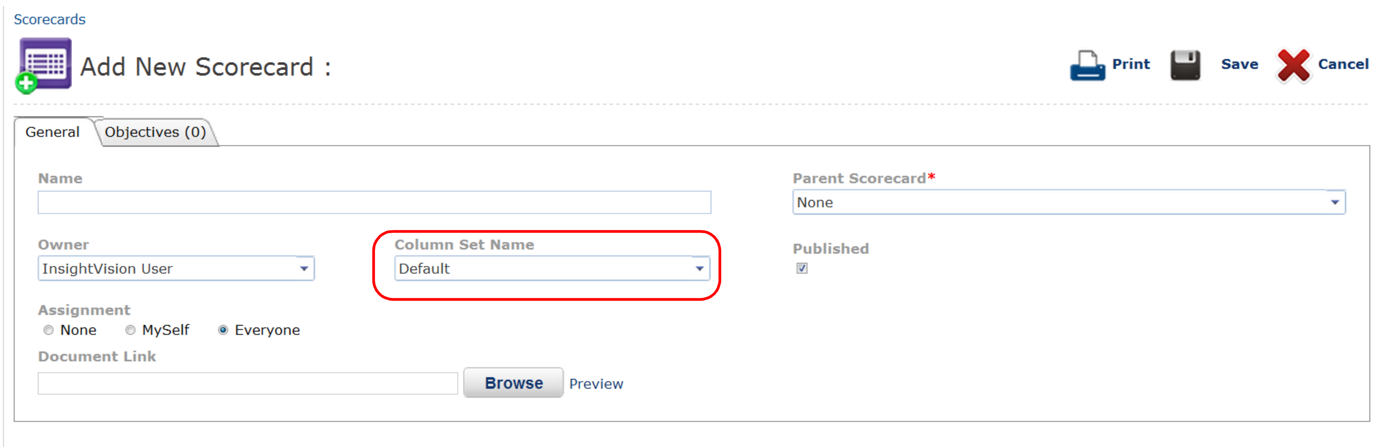
Chapter 13: Scorecard Column Sets

Introduction

Scorecard column sets are an administration setting that control which column items show up on the scoreboard on a per scorecard basis. Each scorecard can have its own “Column Set” or column display options by selecting this on the general tab of the edit scorecard screen.

Administrators may create as many column sets as they would like and they can also adjust the default column set to better fit their organizational needs.

(whenever the column set is assigned to a Scorecard record, the included column names appear when the Scorecard record is displayed on the Scoreboard page.)



This chapter includes the following sections for maintaining Scorecard Column Sets in the InsightVision application.

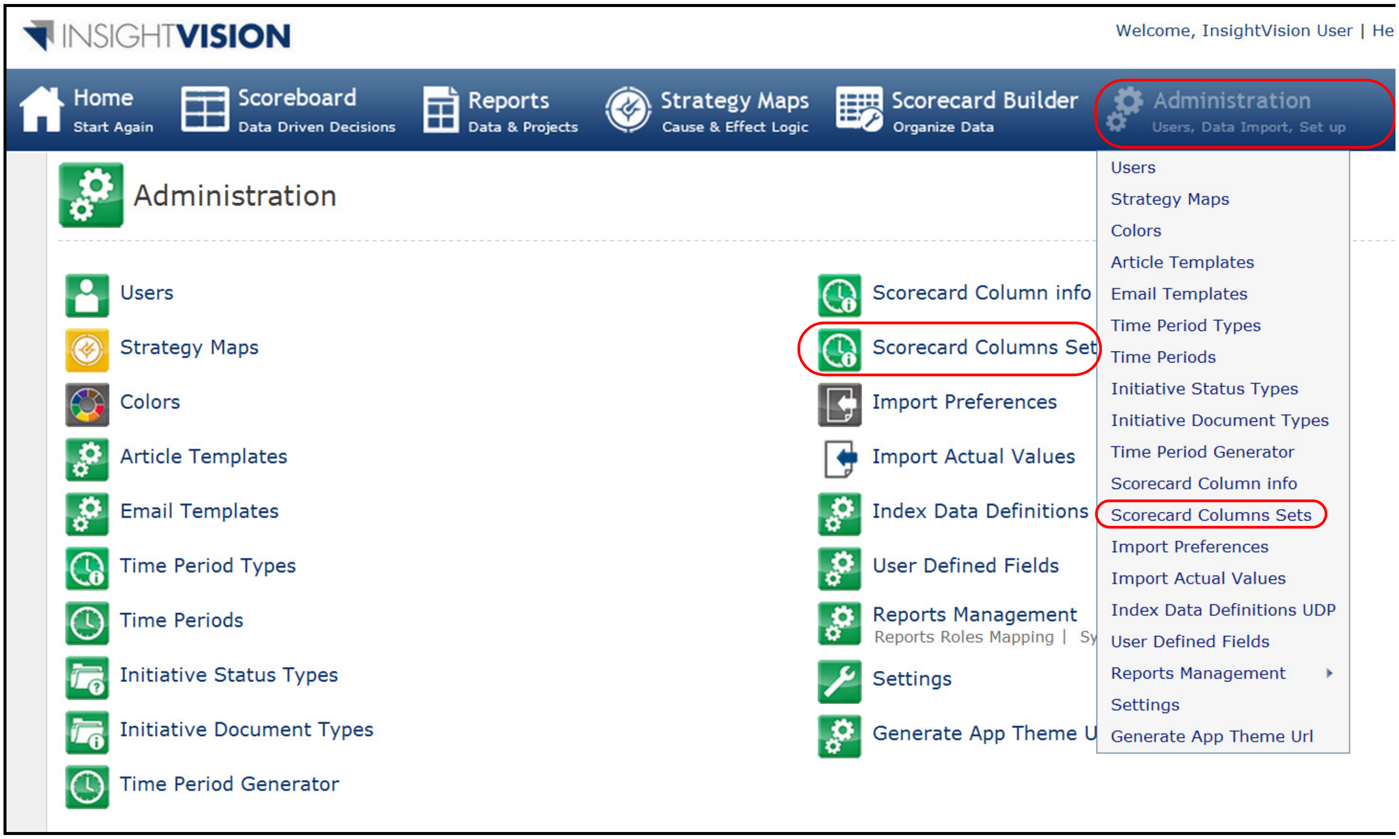
View the Scorecard Column Sets List

Purpose

Use the steps in this section to view the Scorecard Column Sets set up in the InsightVision application.

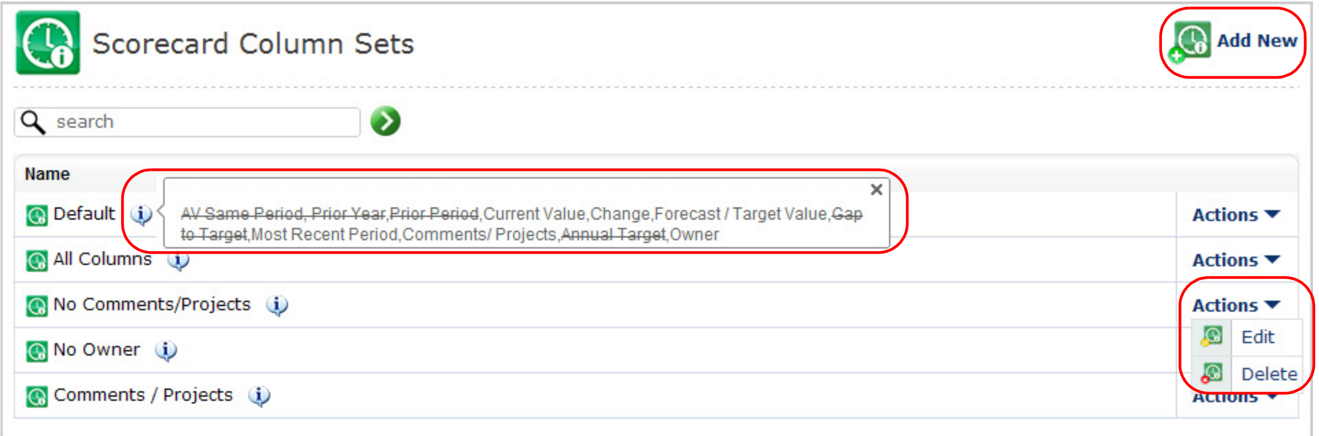
STEPS

Administration Menu



1. From the Menu bar, select the **Administration** menu, **Scorecard Column Sets** command.
   This displays the Scorecard Column Sets page.

Scorecard Column Sets Page



2. Notice the following about the Scorecard Column Sets page:
   - There is one predefined Scorecard Column Set named Default. This column set includes the following columns: Current Value, Change, Forecast / Target Value, Most Recent Period, Comments / Initiatives, and Owner. (For column name descriptions, see page 87.)
   - There is an Information icon next to each column set name; pointing the mouse cursor at, or clicking, the icon displays a list of the column names included in the column set.

     NOTE: *To close the list of column sets, click the Close (X) icon that is in the top, right corner of the information list box.*
   - The actions available on the page are Add New, Edit, and Delete.

     NOTE: *The Delete command appears on the Actions menu only if the selected column set is not assigned to a Scorecard record.*
3. Do any of the following:
   - To add a new scorecard column set, click the **Add New** link. See *Add a New Scorecard Column Set* on page 96.
   - To view or edit the details for a scorecard column set, click the **name** of the Scorecard Column Set record or select the row **Actions** menu, **Edit** command for the record. See *Edit a Scorecard Column Set* on page 99.
   - To delete a scorecard column set, see *Delete a Scorecard Column Set* on page 102.
   - To close the records list page, select a different command from the Menu bar.

Add a New Scorecard Column Set

Purpose

Use the steps in this section to set up new Scorecard Column Set records in the InsightVision application.

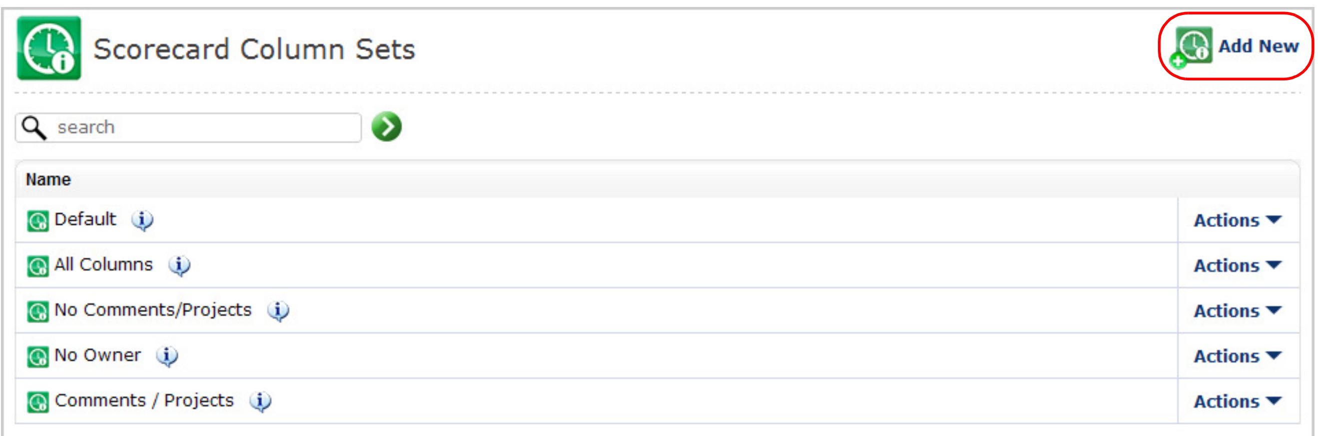
NOTES

- After adding a New Scorecard Column Set, you must define the columns to include in the column set.

STEPS

1. From the Menu bar, select the **Administration** menu, **Scorecard Column Sets** command. This displays the Scorecard Column Sets page.

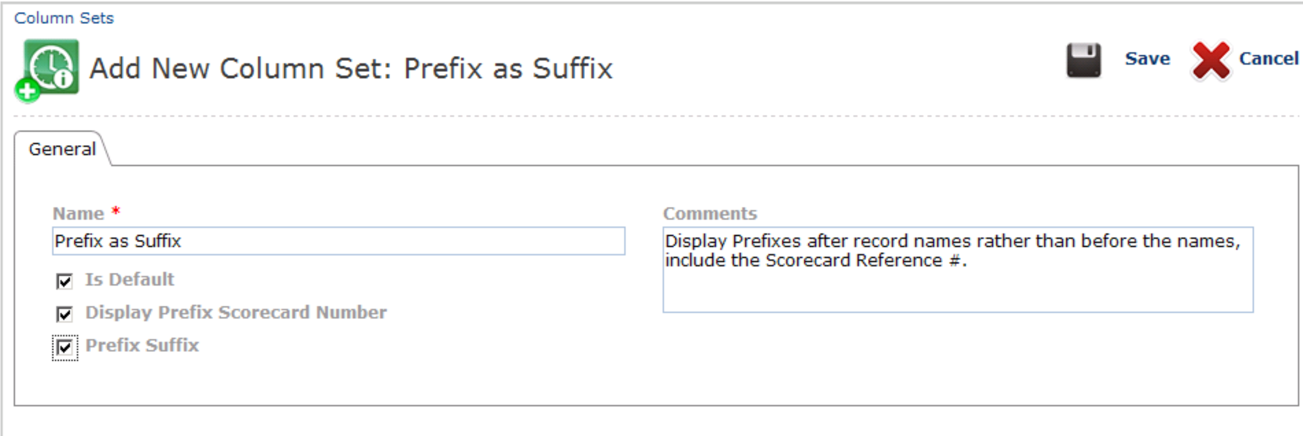
Scorecard Column Sets Page



NOTE: *For more information about the Scorecard Column Sets page, see View the Scorecard Column Sets List on page 94.*

2. Click the **Add New** link. This displays the Add New Column Set page.

Add New Column Set Page



3. Complete the following fields on the General tabbed page:

Name	Type up to 20 characters for the name of the scorecard column set.
Description	Type up to 100 characters for a description of the scorecard column set.
Is Default	Select the checkbox to have the Column Set record enter automatically (as the “default” value) in the Column Set field when a new Scorecard is added in the application. Otherwise, leave the checkbox empty. ***NOTES:*** • *The Column Set field value is added to a Scorecard record on the Scorecard Builder, Scorecard Add or Edit General tabbed page.* • *When you first receive the application, the scorecard column set named “Default” is set as the default value for the Column Set field; the Default checkbox field allows you to set any (one) Column Set record as the default value for the Column Set field.* • *When you select the Is Default checkbox for a Column Set record, it automatically clears the Is Default checkbox field for the Column Set record previously set as the default column set. In addition, the new default Column Set record moves to the top of the list on the Scorecard Column Sets record list page (see page 95).*

Display Prefix Scorecard Number	Select the checkbox to include the Scorecard Reference Number (#) entered for any Objective or Measure record as part of the name of the record when it appears on the Scoreboard page. Otherwise, leave the checkbox empty. ***NOTES:*** • *The Scorecard Reference # appears on the Scoreboard page either before or after the name of the Objective or Measure record name depending on the selection made for the Prefix Suffix field (described below).* • *If the record has an assigned Prefix, the Scorecard Reference # appears between the Prefix and the name of the record (Prefix, Scorecard Reference #, record name).* • *Scorecard Reference #s are added to Objective or Measure records on the Scorecard Builder, Add or Edit General tabbed pages.* • *Scorecard Reference #s can be used as an advanced feature for grouping and sorting the records that display for Scorecards on the Scoreboard page.*
Prefix Suffix	Select the checkbox to have the Prefix assigned to any Objective or Measure record appear as a suffix instead of a prefix to the record name when it appears on the Scoreboard page. That is, the location of the Prefix changes and the Prefix appears after (at the end of) the record name. Otherwise, leave the checkbox empty. ***NOTE:*** *If the Prefix Suffix checkbox is selected, the location also changes for any displayed Scorecard Reference #s (described above). That is, any displayed Scorecard Reference #s also appear after (at the end) of the record name, between the record name and the prefix (record name, Scorecard Reference #, Prefix).*

NOTE: *To optionally close the page without saving the new record, click the Cancel link.*

4. Click the **Save** link to save the new record.

   NOTE: *Depending on the application settings, either the Add New Column Set page closes or the page title changes from Add New Column Set to Edit Column Set and the page has a new tab named Columns.*

Edit a Scorecard Column Set

Purpose

Use the steps in this section to define the columns to include in a new Scorecard Column Set, or to change the details of an existing Scorecard Column Set.

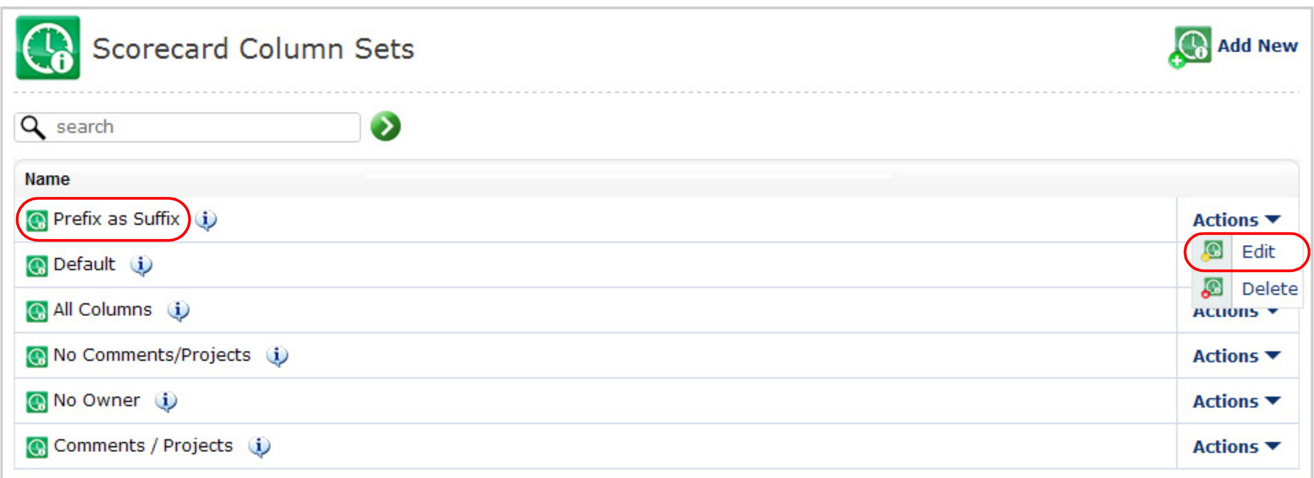
NOTES

- Adding or removing Scorecard Columns from a Scorecard Column Set will be reflected on the Scoreboard page once the record is saved.

STEPS

1. From the Menu bar, select the **Administration** menu, **Scorecard Column Sets** command. This displays the Scorecard Column Sets page.

Scorecard Column Sets Page



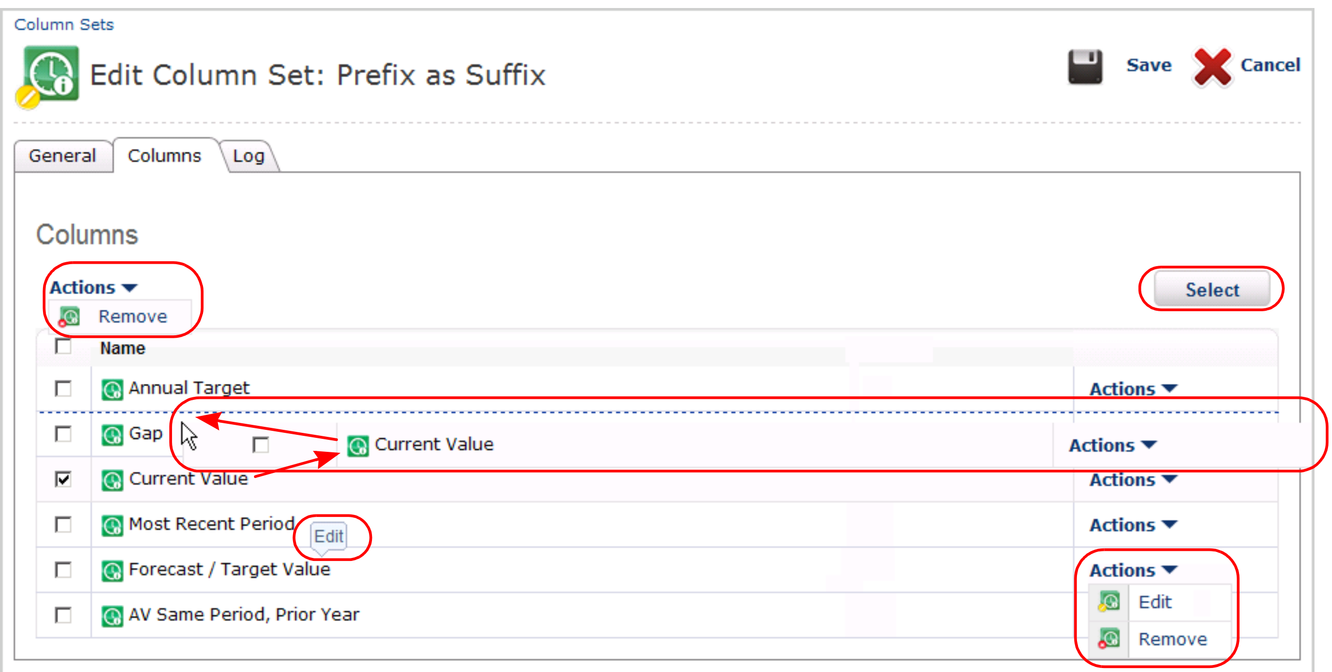
NOTE: *For more information about the Scorecard Column Sets page, see View the Scorecard Column Sets List on page 94.*

2. Click the **name** of the Scorecard Column Set or select the row **Actions** menu, **Edit** command for the Scorecard Column Set record to edit. This displays the Edit Column Set page.

Edit Column Set Page, General Tab

3. Change the fields on the General tabbed page if necessary. For details, see *Add a New Scorecard Column Set* on page 96.
4. Click the **Columns** tab to view or edit the assignment of columns included in the column set. (Otherwise, skip this step.)

Edit Column Set Page, Columns Tab



a. Notice the following about the Columns tabbed page:
   - If you are assigning columns to a new Scorecard Column Set record, the page displays a *No records to display* message. Otherwise, the page lists the Scorecard Column records that are currently included in (assigned to) the Scorecard Column Set record. The page has the basic features of a record list.
   - The order of the columns displayed in the list, from top to bottom, determines the order the columns display on the Scoreboard page, from left to right, for Scorecard records that are assigned this Column Set.
   - The actions available on the page are Drag and Drop, Select, Edit, and Remove.

b. Do any of the following:

- To change the order of the columns in the list and the order in which the columns appear on the Scoreboard page, drag and drop the rows to the desired positions in the list. (The dashed line indicates the new location of a row.)
- To add (assign) columns to include in the column set, click the **Select** button to open the Select Columns selection box. In the selection box, select the checkbox for each scorecard column to include the scorecard column set and then click the **Select and Close** button. (See ***Chapter 12: Scorecard Column Information*** on page 85.)
- To view or edit the details for a Column record, click the **name** or select the row **Actions** menu, **Edit** command for the Column record. This closes the Edit Scorecard Column Set page and opens the Edit Scorecard Column page. See *Edit Information for a Scorecard Column* on page 89.
- To remove one column from the column set, select the row **Actions** menu, **Remove** command for the column to remove.
- To remove multiple columns from the column set, select the checkbox for each column to remove and then select the group **Actions** menu, **Remove** command.

NOTE: *To optionally close the page without saving the changes, click either the Cancel link or the breadcrumb trail link (in the top, left corner of the page).*

5. When you are finished editing the record, click the **Save** link.

6. If necessary, click either the **Cancel** link or the **breadcrumb trail** link (in the top, left corner of the page) to close the Edit Scorecard Column Set page.

Delete a Scorecard Column Set

Purpose

Use the steps in this section to delete a Scorecard Column Set record from the InsightVision application.

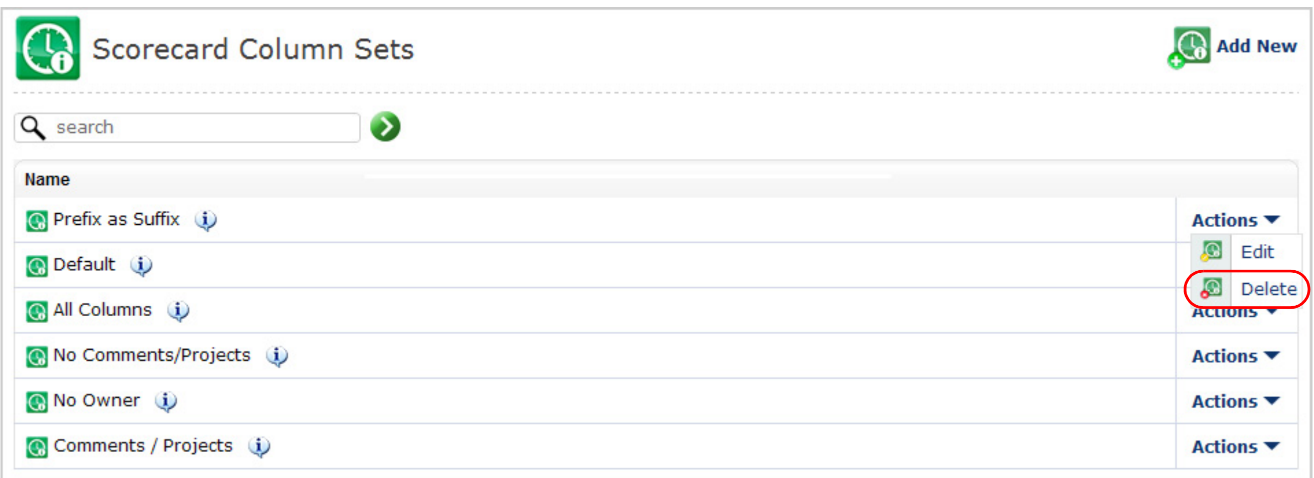
NOTES

- A Column Set record cannot be deleted if it is assigned to any Scorecard records.
- If the Column Set record that is set as the default Column Set field and is deleted the Default column set will be marked as Default again.

STEPS

1. From the Menu bar, select the **Administration** menu, **Scorecard Column Sets** command. This displays the Scorecard Column Sets page.

Scorecard Column Sets Page



NOTE: *For more information about the Scorecard Column Sets page, see* *View the Scorecard Column Sets List on page 94.*

2. Select the row **Actions** menu, **Delete** command for the Scorecard Column Set record to delete.

NOTE: *The Delete command appears in the Actions menu only if the selected column set is not assigned to a Scorecard record.*

3. If a confirmation message appears, click the **OK** button to delete the record. The Scorecard Column Set record no longer appears in the record list.

NOTE: *To optionally keep the record, click the Cancel button.*

Chapter 14: Data Values Import

Introduction

There are two Administration modules that control the importing of Actual Values:

- **Import Preferences —** The purpose of this module is to configure the various rules associated with importing actual values. Users can create multiple preference codes for doing various imports such as updating old data or importing new data. These preference codes are referenced on the CSV file when importing data.
    - *Add / Edit an Import Preference Code* on page 104
- **Import Values —** upload CSV files with data values The purpose of this component is to provide the user an online, end-user, access point for importing actual values using a CSV file (spreadsheet).

  This chapter includes the following sections for importing data values for Measure records:

- *Prepare the Data Records* on page 108
- *Prepare the Actual Value Data to Import* on page 110
- *Import the Actual Values* on page 111

Add / Edit an Import Preference Code

Purpose

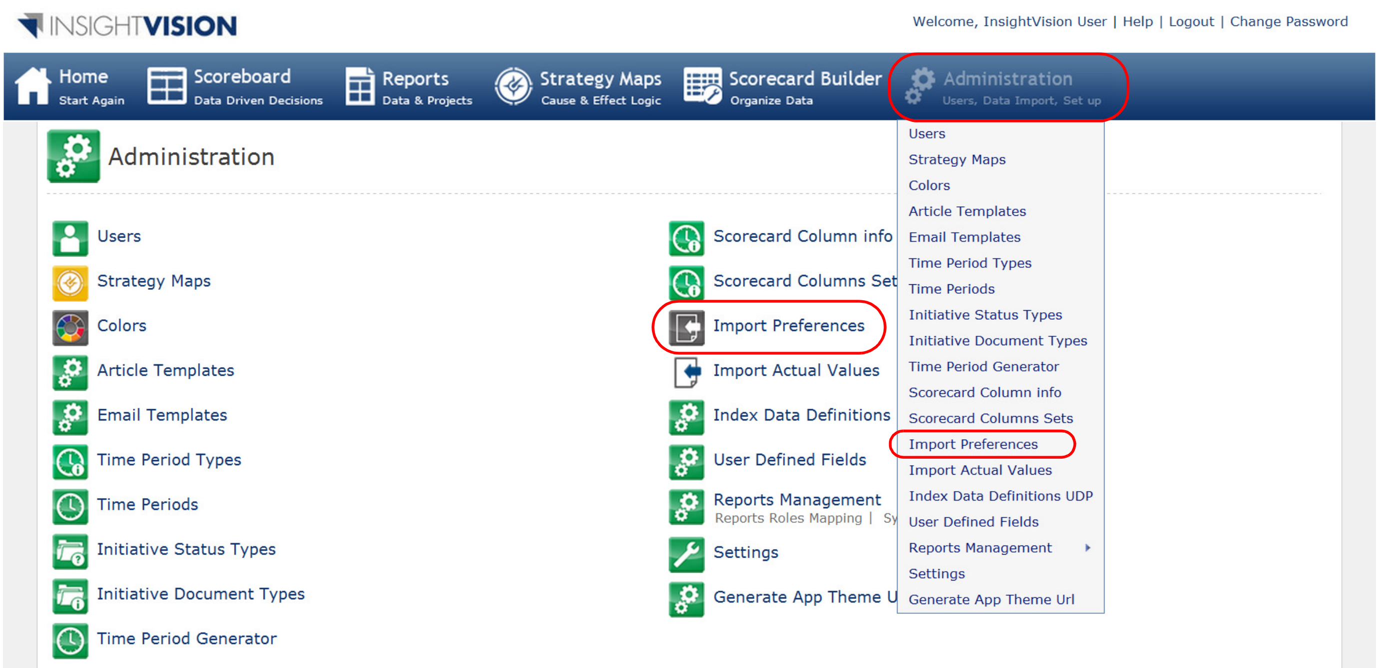
Use the steps in this section to add a new preference code or to change the details of an existing Scorecard Column Set. required for importing data.

NOTES

- An Import Preference Set code is a set of rules that are applied to Actual and Target values when they are imported into InsightVision using the Import Values module.

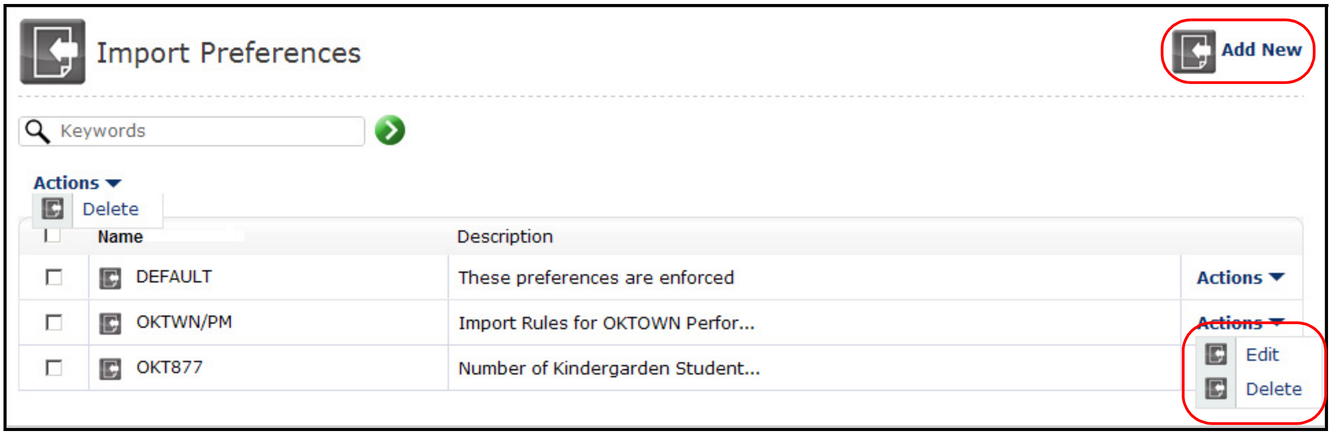
STEPS

Administration Menu



1. From the Menu bar, select the **Administration** menu, **Import Preferences** command.
This displays the Import Preferences page.

Import Preferences Page



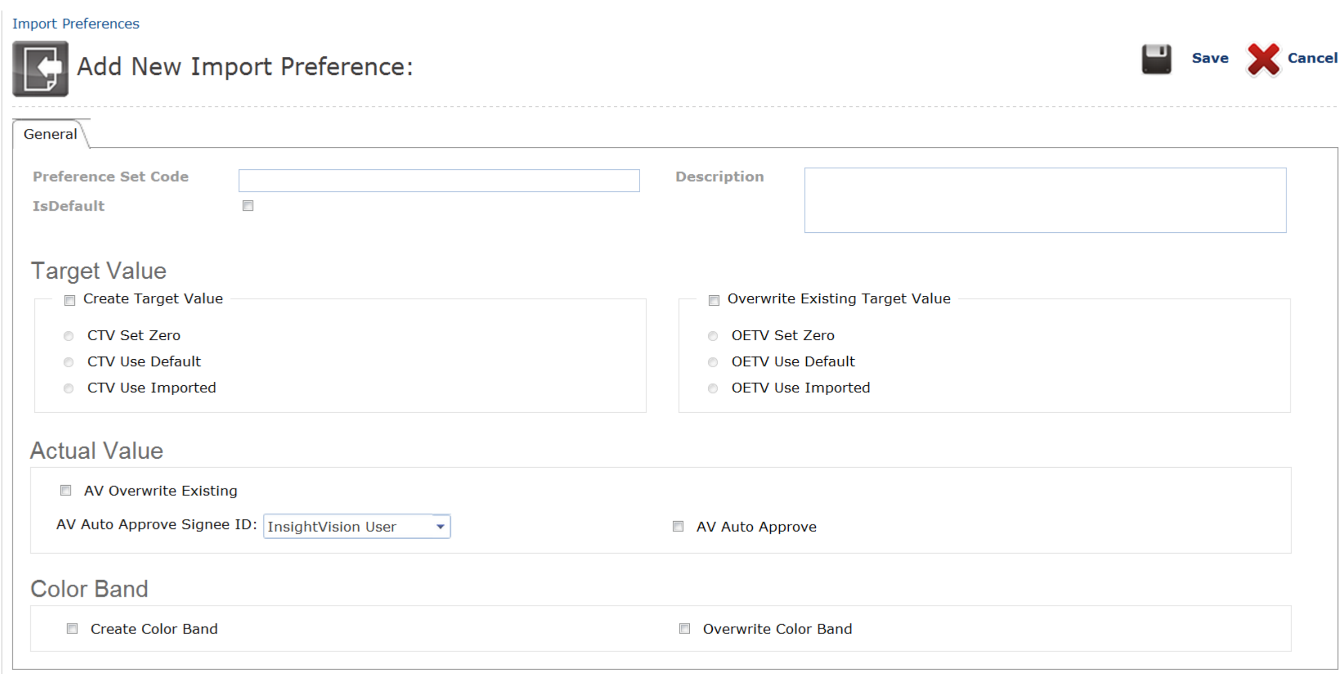
2. Notice the following about the Import Preferences page:

- There is one predefined Preference Code named DEFAULT.
- The actions available on the page are Add New, Edit, and Delete.

3. Do any of the following:

- To add a new Preference Code, click the **Add New** link and continue with the next step.
- To view or edit the details for a Preference Code, click the **name** of the Preference Code record or select the row **Actions** menu, **Edit** command for the record, and continue with the next step.
- To delete a Preference Code, Select the row **Actions** menu, **Delete** command for the Preference Code record to delete. To optionally keep the record, click the Cancel button.
- To close the records list page, select a different command from the Menu bar.

Add New (or Edit) Import Preference Set Page



4. Complete the following fields on the General tabbed page:

Preference Set Code	Type up to 20 characters for the name of the Preference Code. The Name of set of the preference code will be referenced in the CSV when importing If no preference set code is referenced in the CSV file the default preference code will be used.
Description	Type up to 100 characters for a description of the scorecard column set.
Is Default	Select the checkbox to have the Preference Code record enter automatically for imported values if no Preference Code is referenced in the CSV file.
Create Target Value (CTV)	Select the checkbox to create a target value record for the actual value being imported. Otherwise, leave the checkbox empty. If selected, choose one of the following: CTV Set Zero — Create Target Value Set Value to 0 CTV Use Default — Create Target Value rule that states: “If a default target value is defined in the scorecard builder for this measure, use that, if not, use the imported value, if no imported valued exists, then set to 0 CTV Use Imported — Create Target Value equal to value listed in CSV spreadsheet. If no value is listed, then use null (blank)
Overwrite Existing Target Value (OETV)	Select the checkbox to Overwrite existing target value record for the actual value being imported even if one already exists Otherwise, leave the checkbox empty. If selected, choose one of the following: OETV Set Zero — Overwrite Existing Target Value Set Value to 0 OETV Use Default — Overwrite Existing Target Value rule that states: “If a default target value is defined in the scorecard builder for this measure, use that, if not, use the imported value, if no imported valued exists, then set to 0 OETV Use Imported — Overwrite Existing Target Value equal to value listed in CSV spreadsheet. If no value is listed, then use null (blank)
Actual Value (AV) Overwrite Existing	Select the checkbox to overwrite existing actual value if one already exists Otherwise, leave the checkbox empty.
AV Auto Approve	Select the checkbox to automatically approve imported actual values (publish them to scoreboard). Otherwise, leave the checkbox empty.
AV Auto Approve Signee ID	If AV Auto Approve checkbox is selected, then select record for user who approved actual value

Create Color Band	Select the checkbox to create a color band record for the actual value based on the default color bands for the measure if it is defined in the scorecard builder. If it is not defined, then the color band will be white. Otherwise, leave the checkbox empty to not have any color band record created for the imported actual value.
Overwrite Color Band	Select the checkbox to overwrite the existing color band record for the actual value based on the default color bands for the measure if it is defined in the scorecard builder. If it is not defined, then the color band will not change for the overwritten value. Otherwise, leave the checkbox empty to not overwrite the existing color band for the imported actual value.

5. Click the **Save** link to save the code.

NOTE: *To optionally close the page without saving the new code, click the Cancel link.*

6. If necessary, click either the **Cancel** link or the **breadcrumb trail** link (in the top, left corner of the page) to close the Edit Preference Code page.

Prepare the Data Records

Purpose

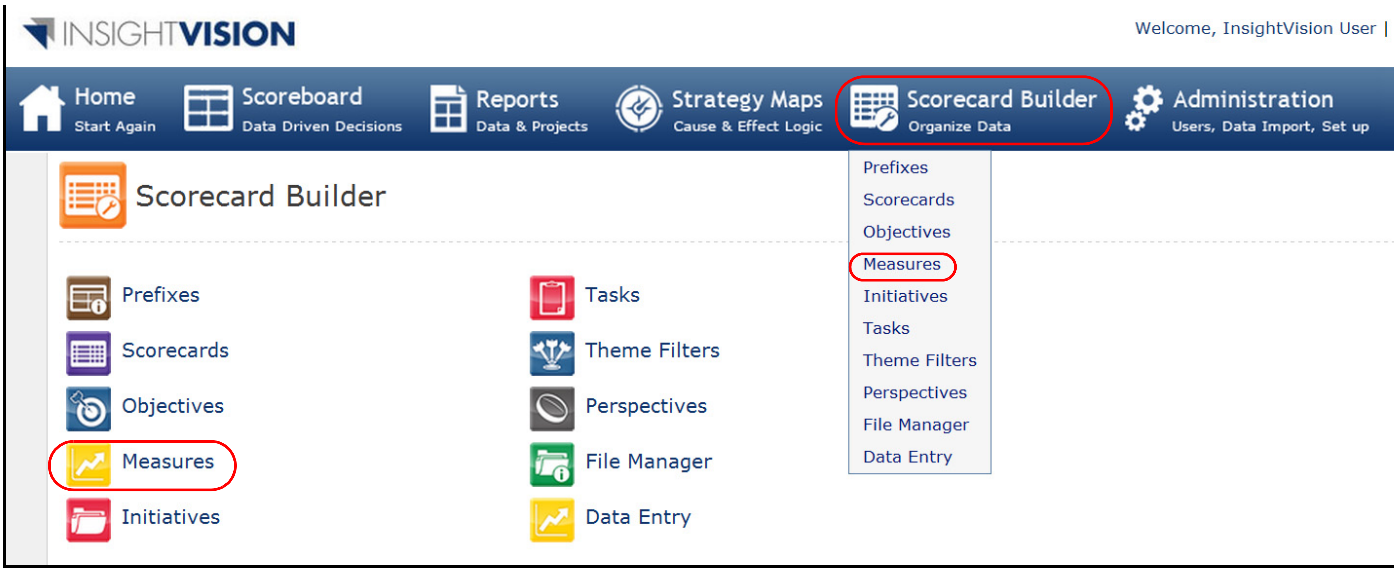
Use the steps in this section to prepare Measure records for data import, and to gather information required for importing data.

STEPS

NOTE: *This section requires use of the Scorecard Builder module functions.*

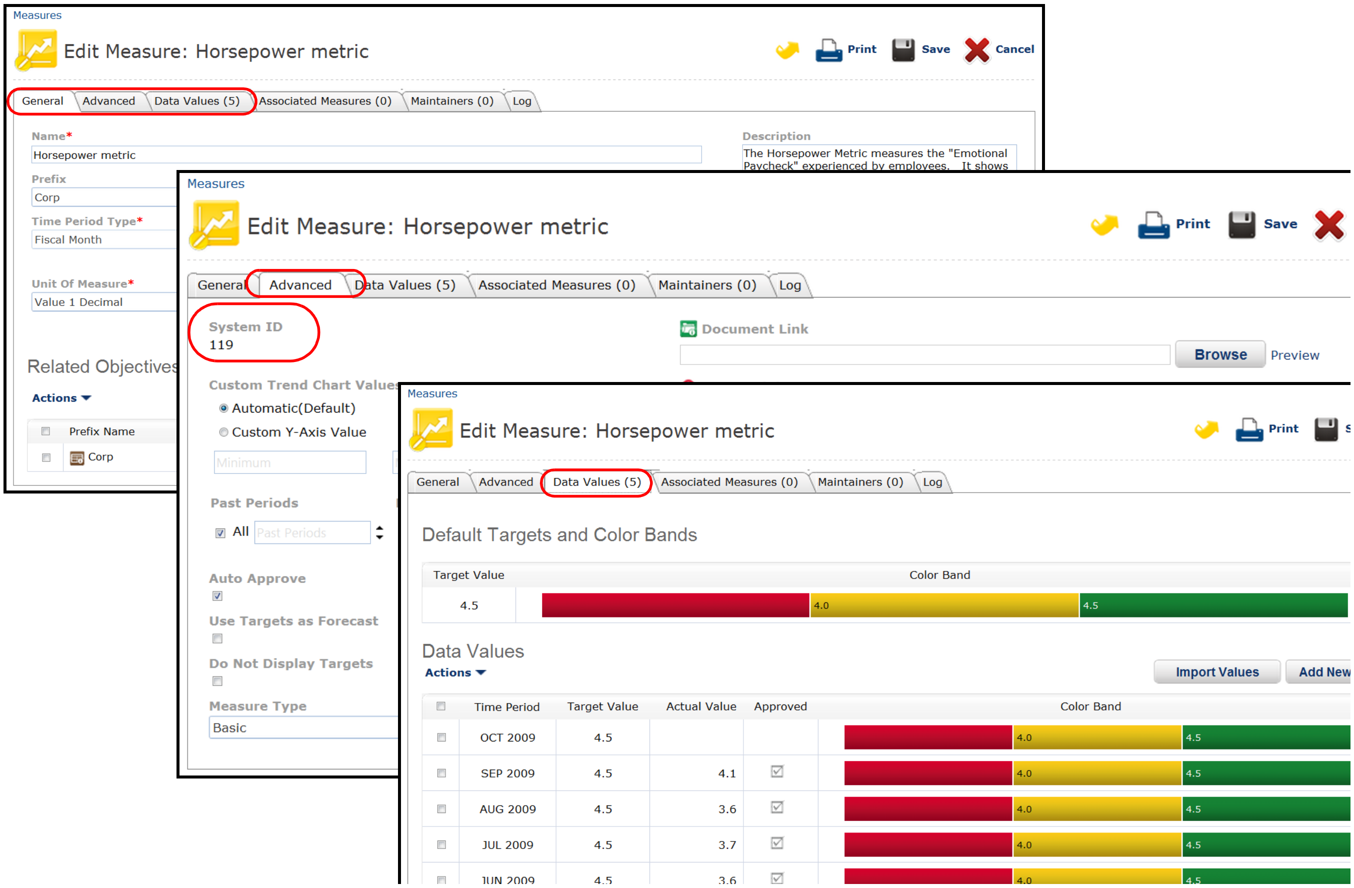
1. Make sure the Measure records are set up in the InsightVision application. Add any new records if necessary.

Scorecard Builder Menu



2. Open the Edit page for the Measure record for which to import data.

Edit Page, Measure



3. Make note of the following record details:
   - From the General tabbed page, Name, Time Period Type.
   - From the Advanced tabbed page, System ID number.
   - From the Data Values tabbed page, has data been entered?
4. Define the Default Color Bands if not done already and if wanted.
5. Compare data you have with data entered to see what overrides, if any, are required.
6. Set up Import Preference code, see *Set up Import Preference code, see* on page 109

Prepare the Actual Value Data to Import

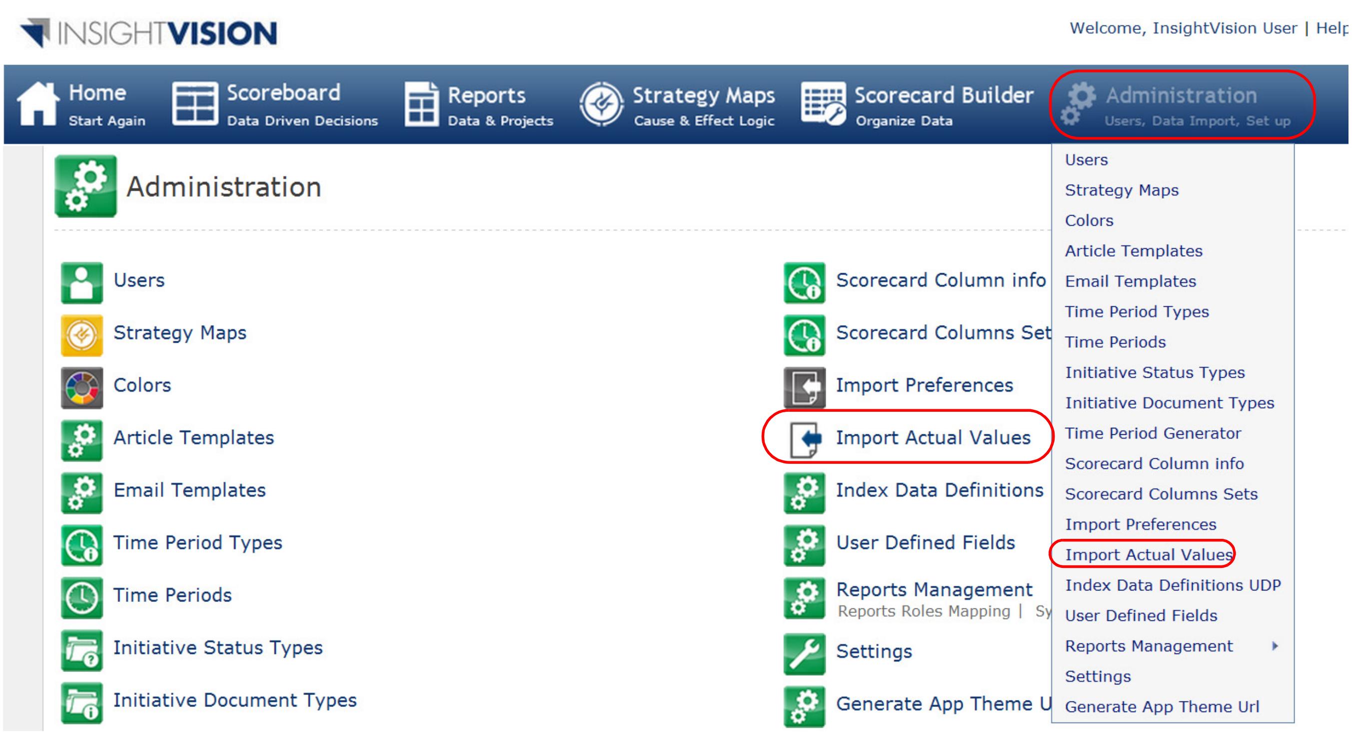
Purpose

Use the steps in this section to prepare an Import File, Measure records for data import, and to gather information required for importing data.

STEPS

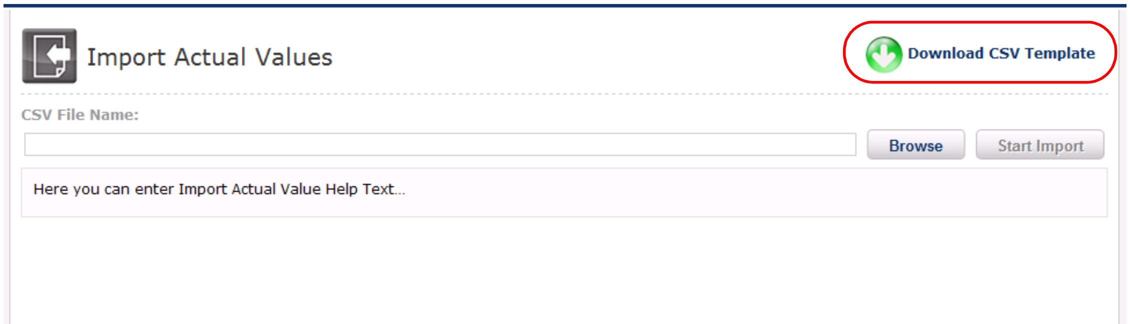
Prepare the Spreadsheet

Administration Menu



1. From the Menu bar, select the **Administration** menu, **Import Actual Values** command.
   This displays the Import page.

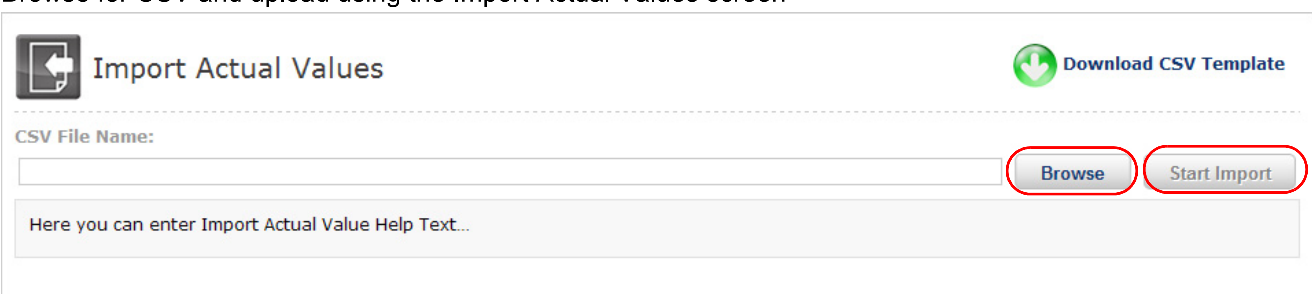
Import Values Page



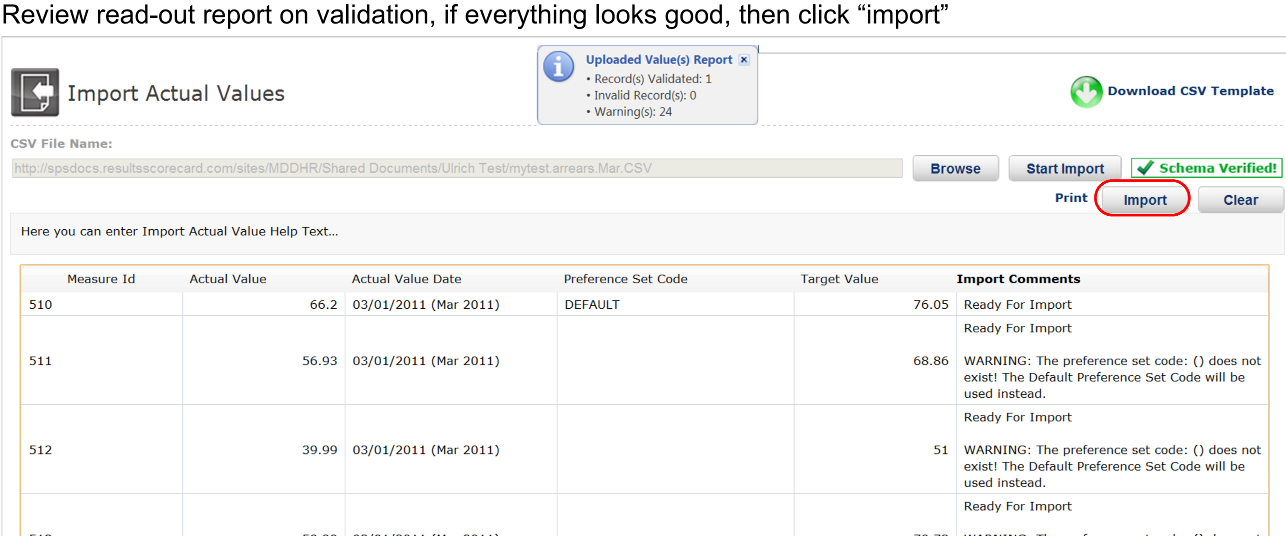
2. Click the **Download CSV Template** link.
3. Open the downloaded Excel Template.
4. Format Data in provided CSV spreadsheet creator according to the example (Excel Document)
5. Create CSV file using the excel button macro

Import the Actual Values

6. From the Menu bar, select the **Administration** menu**, Import Values Command.**
7. Browse for CSV and upload using the Import Actual Values screen



8. Click the Start Import button to verify data
9. Review read-out report on validation, if everything looks good, then click “import”



NOTE: *Optionally click clear to cancel the import.*

NOTES:

NOTES:

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