INSIGHTVISION

Getting Started
User Guide

INSIGHT FORMATION
Manage the Future Today.

4050 Olson Memorial Hwy, Suite 445
Minneapolis, MN 55422
Telephone: 763-521-4598
www.insightformation.com

Welcome to InsightVision 2.0™! You are on your way to quickly implementing your strategic performance management system. Before you use the InsightVision application, please read this Getting Started User Guide carefully. It is your starting point for using the application.

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

Insightformation, Inc. — http://www.insightformation.com

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Contents

Chapter 1: InsightVision Introduction 1
Application Overview 1
General Description 1
Basic Page Layout 2
Application Modules 3
Home 3
Scoreboard 4
Reports 5
Initiative Monitor 5
My Featured Measures 6
My Featured Initiatives 6
Predefined Reports 7
Strategy Maps 8
Scorecard Builder 9
Administration 9
Views 10
Measure at a Glance View 10
Objectiveboard 11
Objective Presentation View 12
Measureboard Page 13
Initiative Presentation View 14
Chapter 2: InsightVision Records 15
Introduction 15
Users 15
Perspectives 16
Prefixes 16
Scorecards 17
Objectives 18
Measures 19
Initiatives 21
Tasks 22
Strategic Themes 23
Chapter 3: Initial Startup 25
Introduction 25
Internet Browser Settings 25
First-Time Login 26
Chapter 4: Common Procedures 29
Introduction 29
Begin a Session 29
Replace a Forgotten Password 30
Change Your Password 31
End a Session 32

NOTES:

Chapter 1: InsightVision Introduction

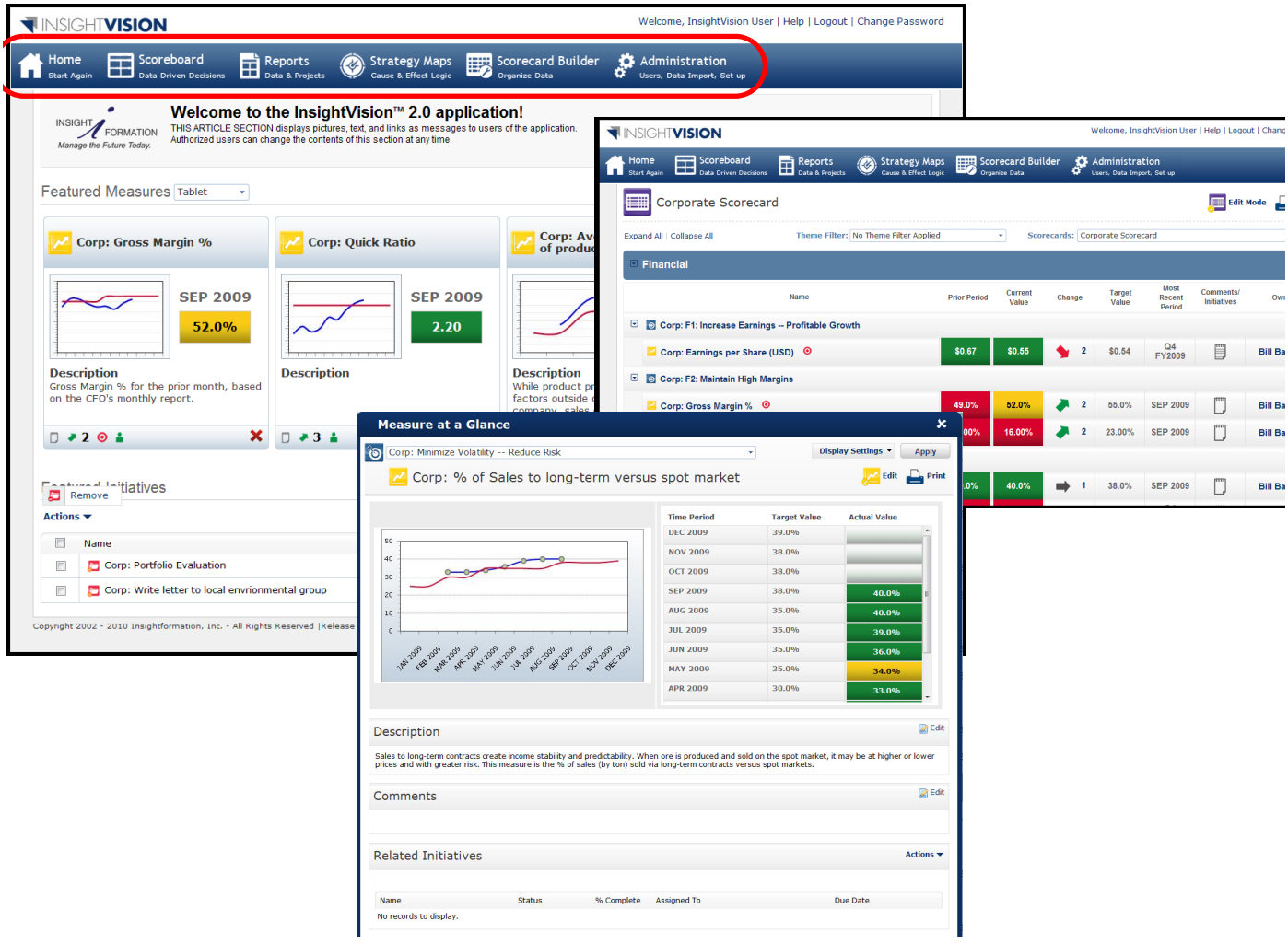
Application Overview

General Description

The InsightVision 2.0™ application is a Strategy Management System used to quickly and easily implement the Balanced Scorecard™ (BSC) or other strategy or performance management methodologies. Implementation of these methodologies involves identifying strategic changes wanted for organizations or communities and establishing objectives for them, identifying ways to measure progress towards achievement of the objectives, gathering and presenting measurable information to stakeholders about the objectives, prioritizing and tracking initiatives, and making changes as necessary.

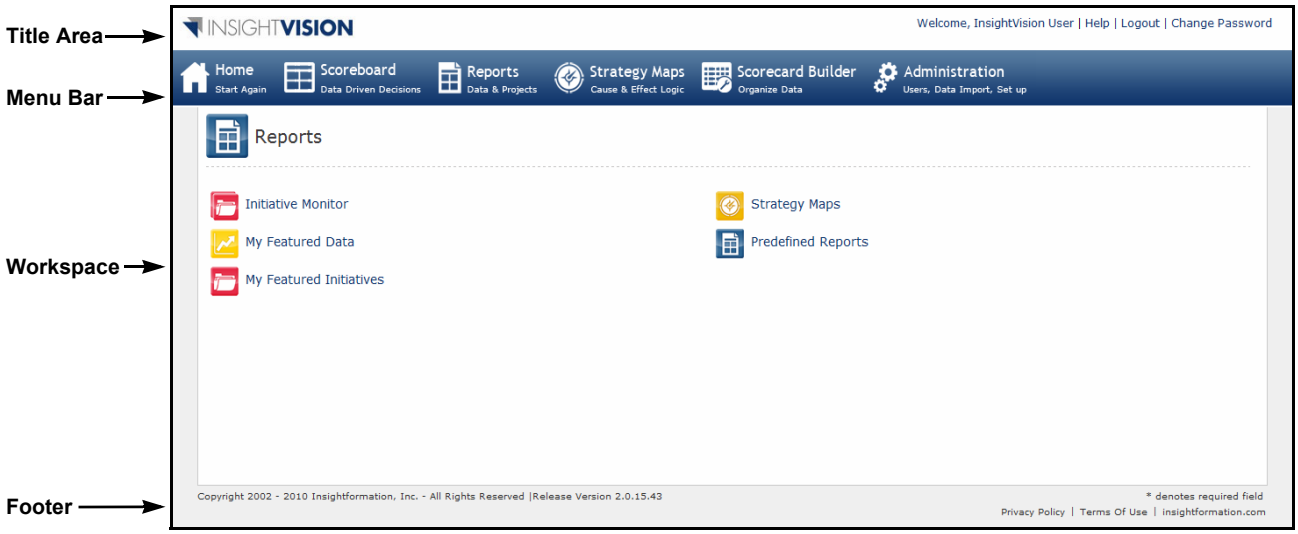
The InsightVision application is an Internet browser-based application that opens as a website inside an internet browser such as Microsoft™ Internet Explorer™. The InsightVision application serves as a centralized repository for strategy information and performance measurement data. The application has several interactive reports that provide quick access to strategy and performance information for analysis, interpretation, maintenance, and presentation to stakeholders.

When you start the application and log in, the Home page is the first page that opens (shown below on the left side). The Menu Bar, near the top of the page, contains the menus for the application's modules, which are Home, Scoreboard, Reports, Strategy Maps, Scorecard Builder, and Administration. (Also shown below are a Scoreboard page and a Measure at a Glance view.)



Basic Page Layout

Each module of the application opens as a new page in the internet-browser window. The basic layout of each page includes a Title Area, Menu bar, Workspace, and Footer.



NOTE: *The contents of the Title Area, Menu Bar and Footer are the same on every page; the contents of the Workspace changes based on the module and function you are using.*

- **Title Area** — contains the application logo and user login information.
- **Menu Bar** — contains the module menus: Home, Scoreboard, Reports, Strategy Maps, Scorecard Builder, and Administration. Clicking a module name on the Menu Bar opens that module in the Workspace Area of the page.

  NOTE: *For the Reports, Scorecard Builder, and Administration modules, the application can be configured to drop down the menu by hovering over the menu header or by clicking on it.*

  NOTE: *The Scorecard Builder and Administration menus only appear for specified users with access.*
- **Workspace** — is your working area of the application; the contents change based on which module and function you are using. (The example above shows the result of clicking on the menu header.)

  NOTE: *Most examples shown in the InsightVision User Guides show only the Workspace of each page.*
- **Footer** — contains the legal information and links.

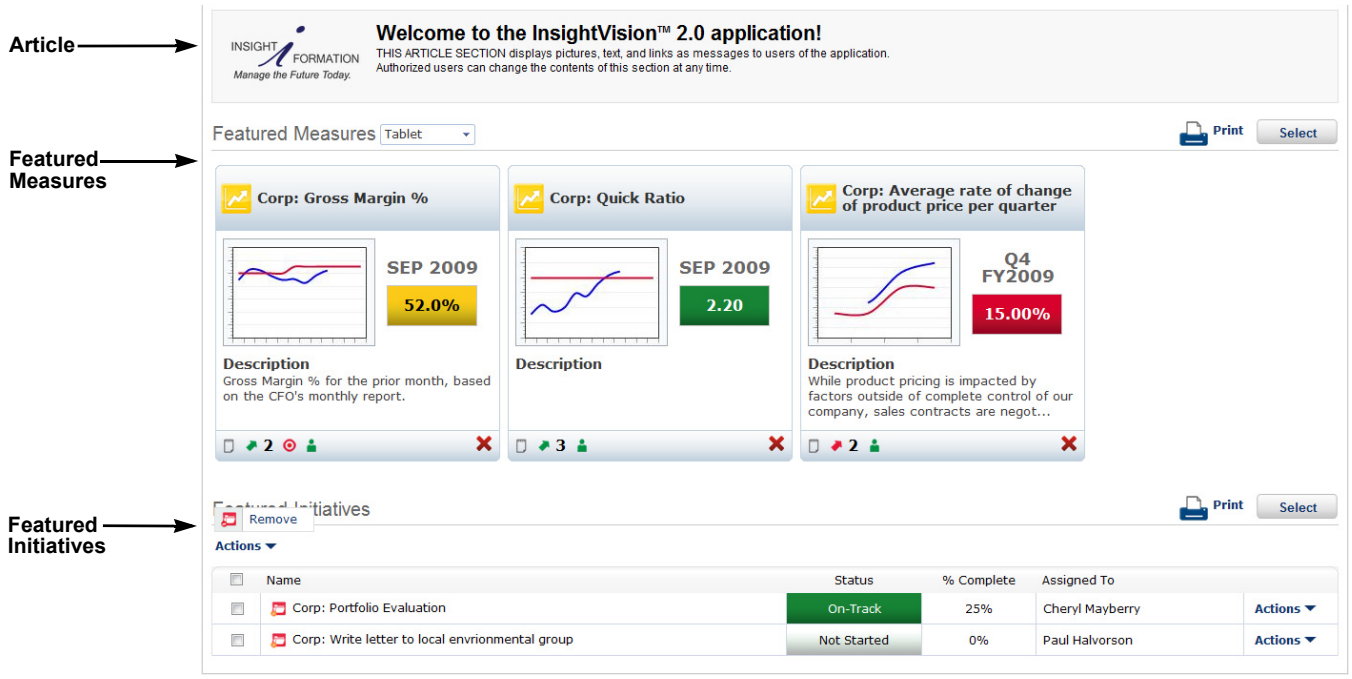
Application Modules

The application modules include: Home, Scoreboard, Reports, Strategy Maps, Scorecard Builder, and Administration. This section briefly introduces the application modules. For detailed procedures, see the other User Guides in the ***InsightVision User Guide*** set.

NOTE: *The modules and functions available to a user depend on roles and permissions assigned to the user. For details, see* ***Users*** *on page 15.*

Home

The Home page opens when you start the application and whenever you select ***Home*** from the menu bar. The Home page has three sections: Article, Featured Measures, and Featured Initiatives.



NOTE: *If your organization has customized the Home page, it may look different from what is shown here.*

- **Article** — this section displays special messages for everyone who logs into the system.There are several templates available and the software has an HTML editor that allows specified users to maintain the contents. For details, see the ***Scorecard Builder User Guide***.
- **Featured Measures** — this section displays a personalized set of Measures unique to each user. Each user can change which measures are featured and display them as either tablets (as shown) or lines of records (not shown). Measures displayed in this section have icons and links that provide quick access to other features of the application, such as interactive reports (views).
- **Featured Initiatives** — this section displays information on Initiatives selected by each user. The Initiatives have links that provide quick access to other features of the application, such as interactive reports (views).

Scoreboard

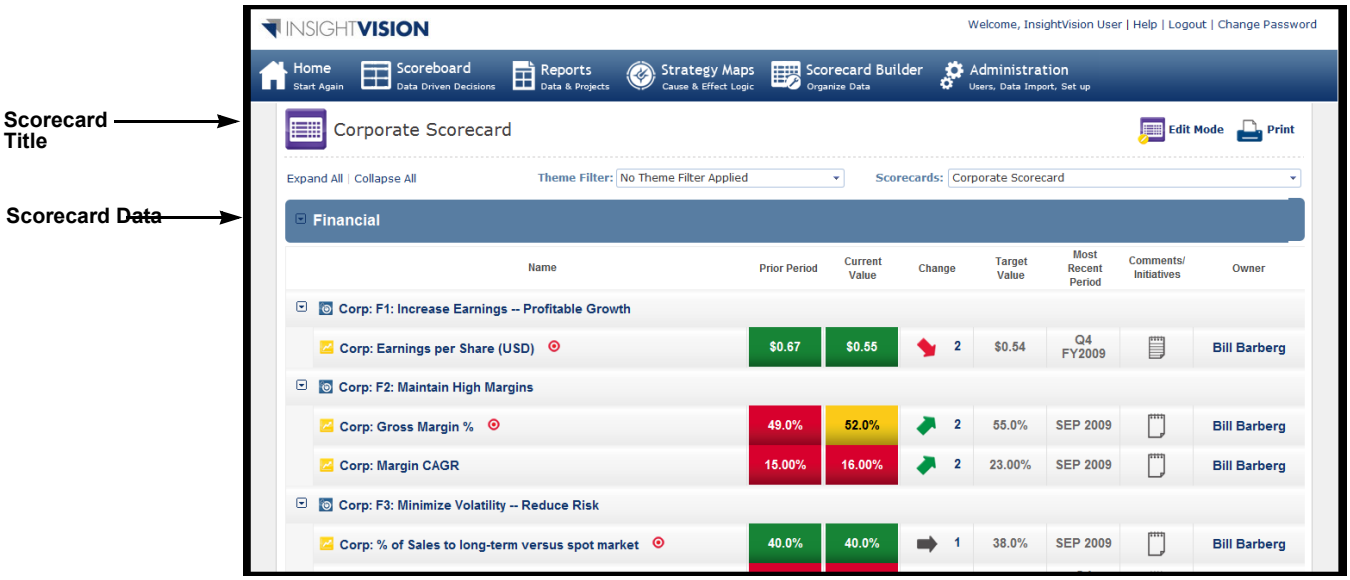
The Scoreboard module consists of an interactive Scoreboard page with links to the additional pages and interactive reports, called Views. The Scoreboard module is a collaborative tool for viewing and analyzing performance information, presenting the information to stakeholders, and for entering additional information and comments.

This module is available to all users and displays information that typically defined and entered using the Scorecard Builder module. For specified users, the Scoreboard module can toggle into the Edit Mode with direct access to the Scorecard Builder functionality to allow in-place editing. For details, see the ***Scorecard Builder User Guide***.

The Scoreboard module includes the following: Scoreboard page, Objectiveboard page, Objective Presentation View, Measureboard page, Measure at a Glance View, Initiative Presentation View, and Comments.

Scoreboard Page

The Scoreboard page opens when you select ***Scoreboard*** from the menu bar. This page displays a "scorecard" of information for a selected geographic area, division, department, etc.
(This varies depending on the reporting structure set up by your organization.)



NOTE: *If your organization has customized the Perspectives, the Scoreboard page may look different from what is shown here.*

- **Scorecard Title** — this section displays the name of a selected Scorecard, a drop-down list to filter by a Theme, a link for setting the selected Scorecard to display automatically (default) each time you open the Scoreboard page, a link to print the Scoreboard page information, and links to expand or collapse the lists of records displayed on the page. For Scorecard Builders, this section also contains a link for switching between two modes, Presentation and Edit; for details, see the ***Scorecard Builder User Guide***.

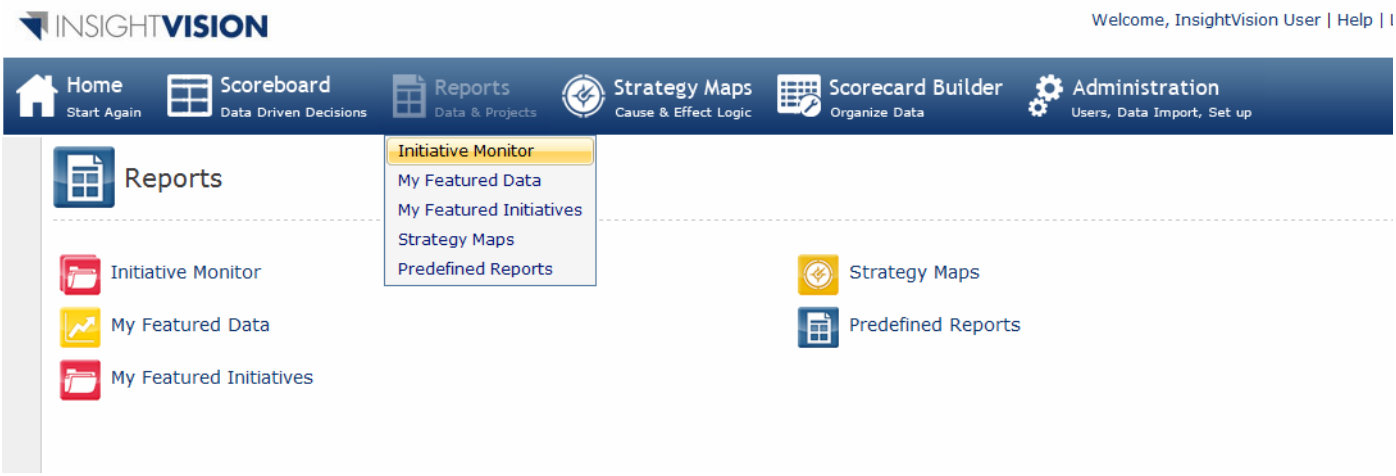
  NOTE: *Scorecards are set up using the Scorecard Builder module. See the Scorecard Builder User Guide.*

- **Scorecard Data** — This section is usually divided into Perspectives; if your organization has customized the application, it may be different from this. This section displays the Objectives that are assigned to the selected Scorecard. This includes Objectives and their related Measures. Objectives and Measures may have icons and links to the Views and other functions in the application, such as Comments (see Links and Icons, below).

Reports

Selecting **Reports** from the menu bar displays a menu for selecting reports to display, print, or export. The reports included in the InsightVision application are:

- ***Initiative Monitor*** on page 5
- ***My Featured Measures*** on page 6
- ***My Featured Initiatives*** on page 6
- ***Predefined Reports*** on page 7

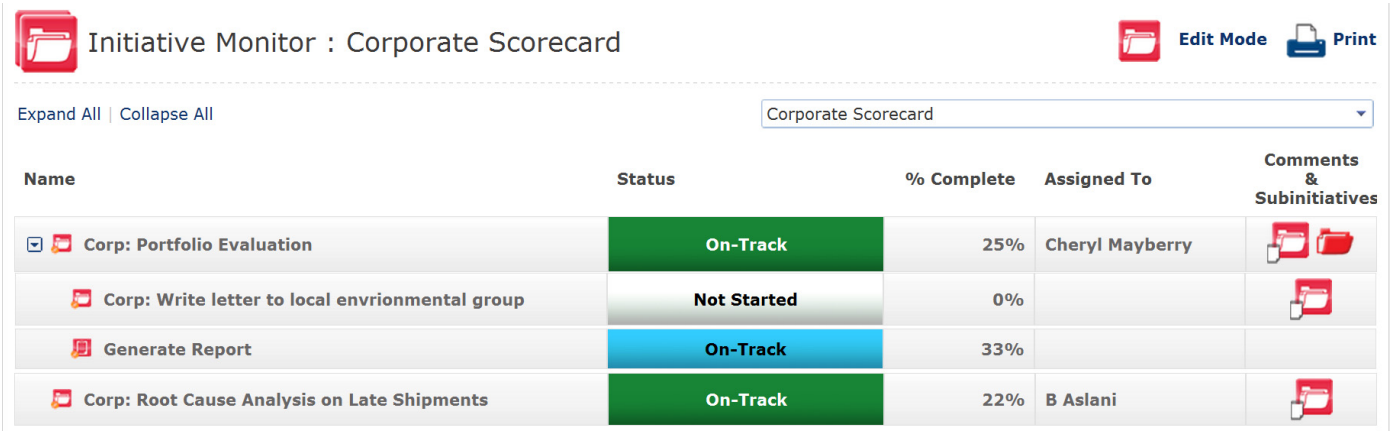


Initiative Monitor

The Initiative Monitor provides an easy way to see the Initiatives (or Projects) along with any Sub-projects or Tasks. The page displays that Initiatives and their related information based on which Scorecard is selected. Initiatives are associated with Measures, which are associated with Objectives which are associated with Scorecards. Selecting a Scorecard allows the User to view all the Initiatives that are associated with Measures that show on that Scorecard.

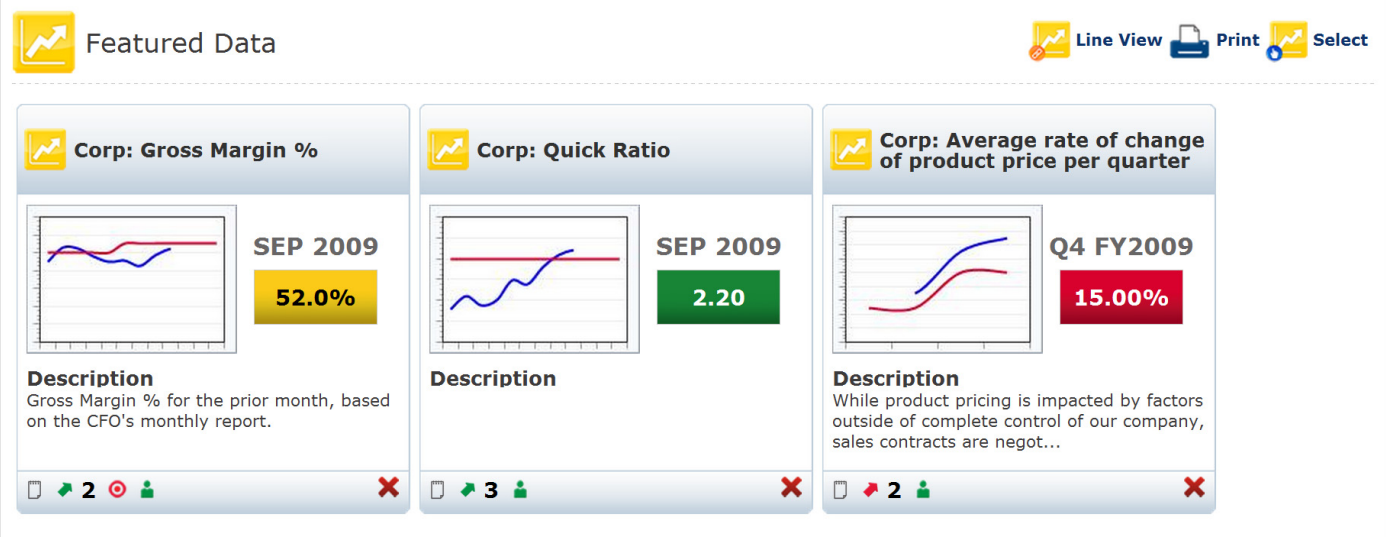
Initiatives can be nested as a hierarchy (with unlimited levels of Sub-initiatives) and can have Tasks. This hierarchy can be expanded or collapsed.

Clicking on an Initiative brings up the Initiative View (described later in this document).

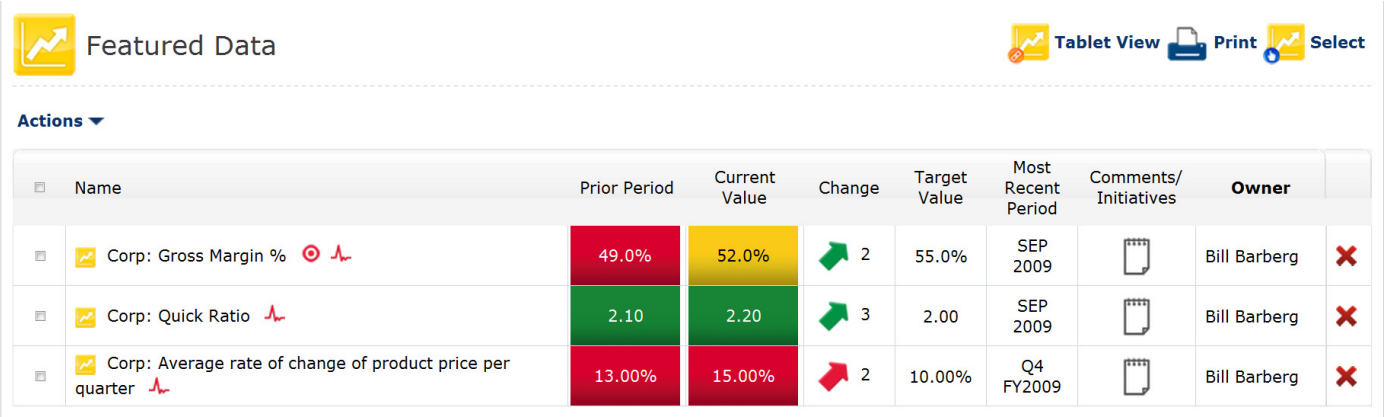


My Featured Measures

My Featured Measures is a full-page display of the same list of Measures that typically display on the User's home page. That list can be modified in either place. The default view is the Tablet View, which has the same interactive features as when it appears on the Home Page.

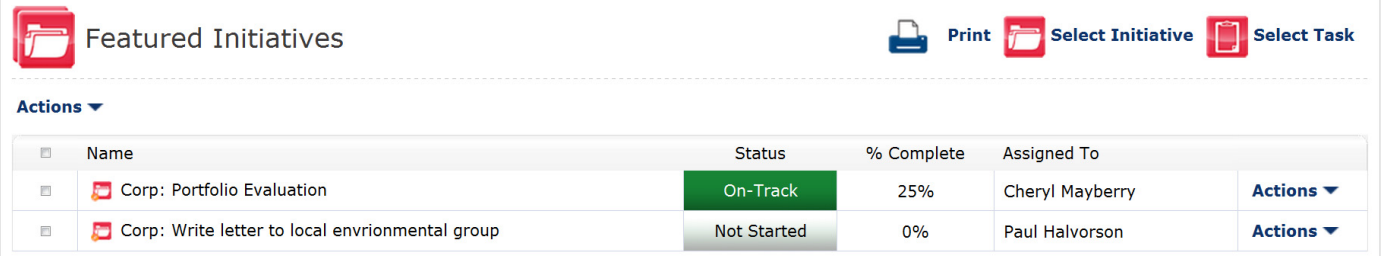


The User can click on Line View to toggle to a display layout that is similar to the Scoreboard, but only shows the Measures that have been selected. Clicking on Tablet View returns the User to the tablet view layout.



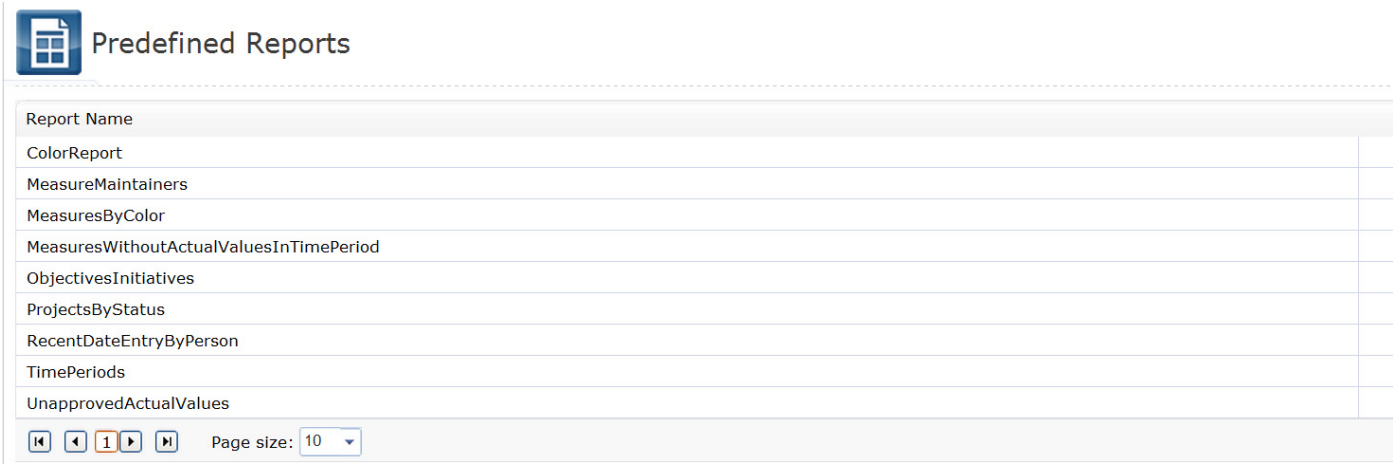
My Featured Initiatives

My Featured Initiatives is a full-page display that provides the same functionality that is typically available on the bottom of the home page.

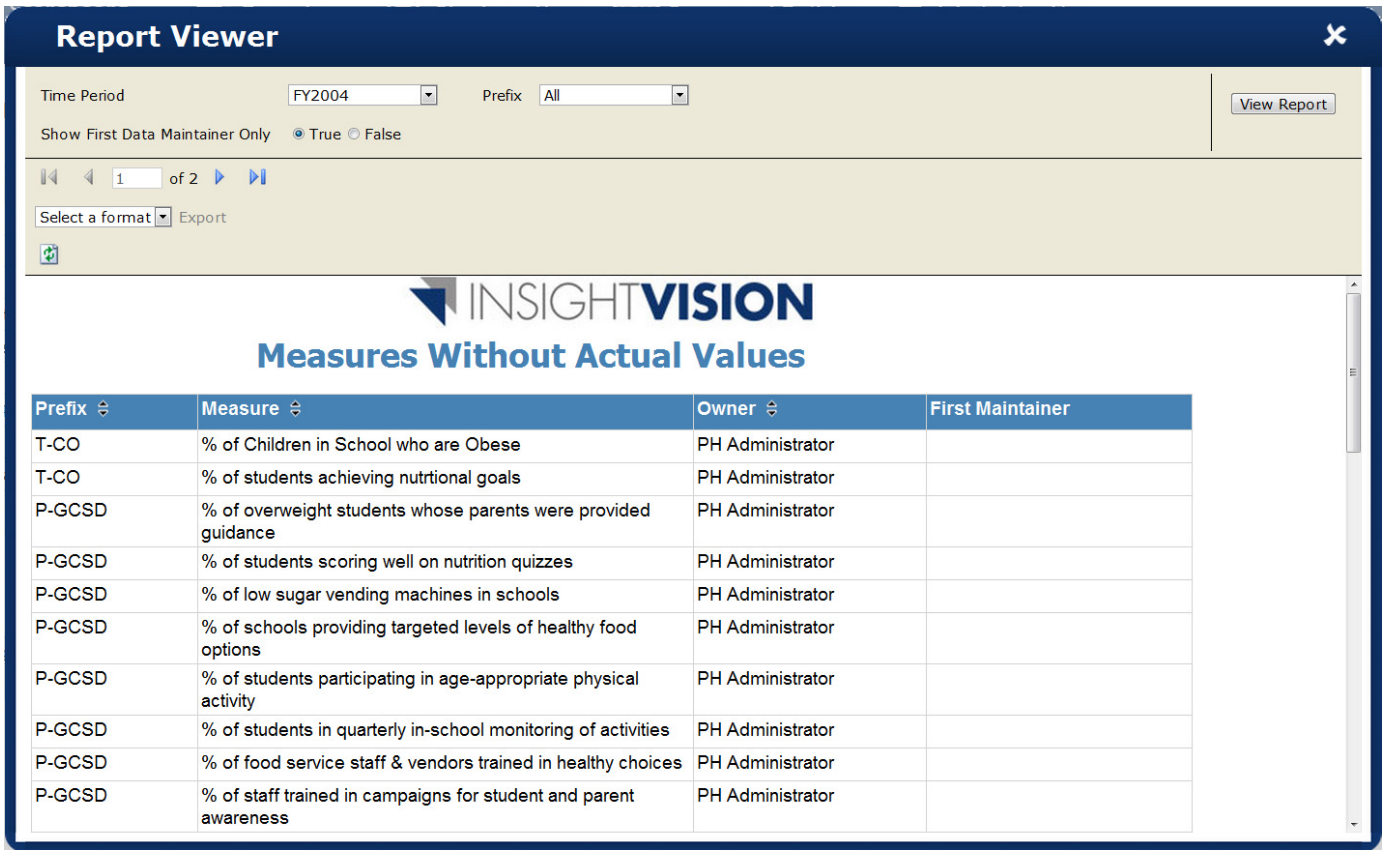


Predefined Reports

Predefined Reports can vary from organization to organization. These reports are created using Microsoft SQL Server's Reporting Services (SSRS). There is a standard library of reports that can be selected for a particular organization, and additional reports can be created as needed by the Client or by using Insightformation's Professional Services.



Clicking on the report name pops up a Report Viewer that displays the report content and allows a variety of interactive options, depending on the design of the report. The example below shows measures that don't have data for a particular time period—a variable selected using the drop-down on the top of the report.



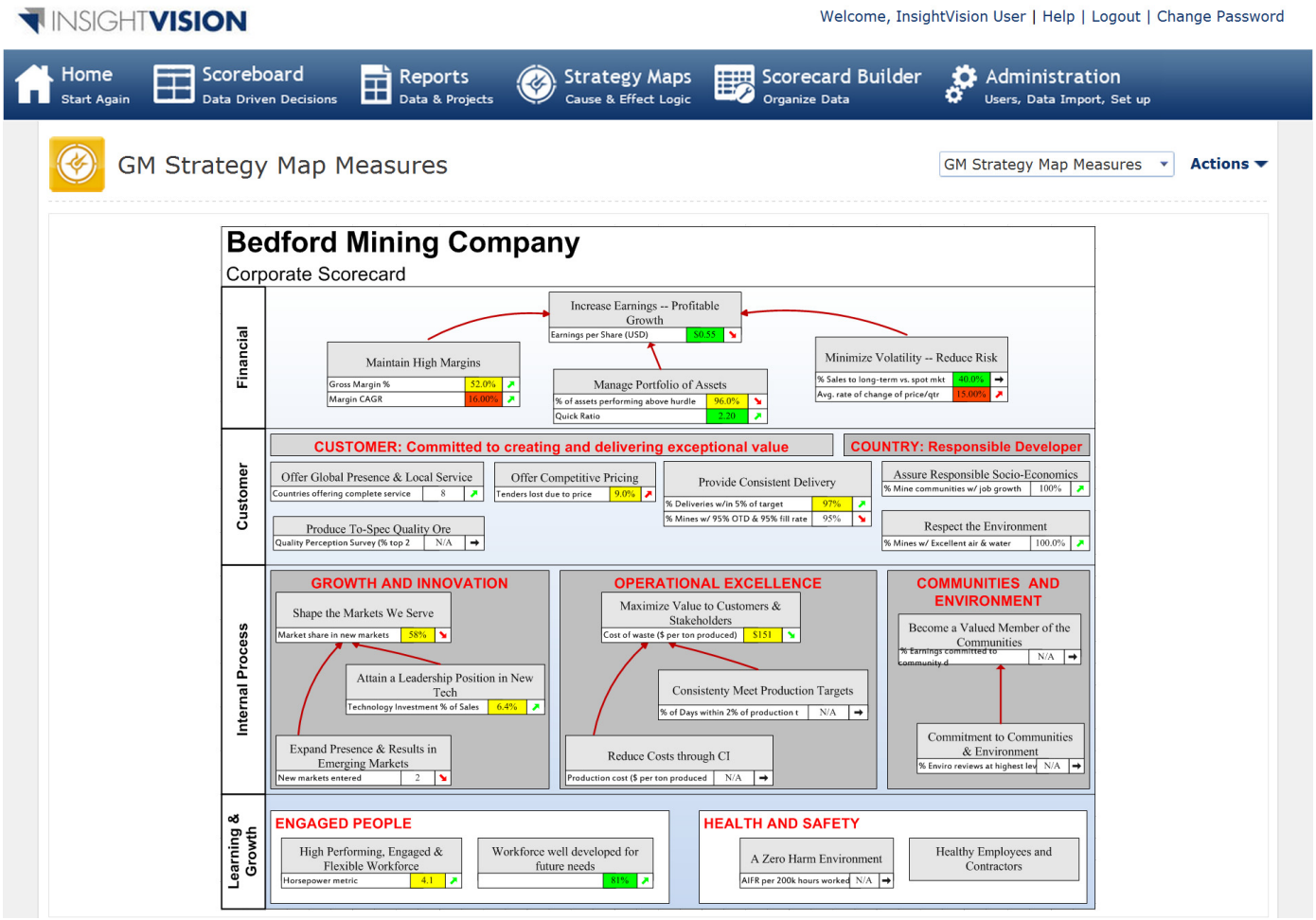
Prefix	Measure	Owner	First Maintainer
T-CO	% of Children in School who are Obese	PH Administrator	
T-CO	% of students achieving nutrtional goals	PH Administrator	
P-GCSD	% of overweight students whose parents were provided guidance	PH Administrator	
P-GCSD	% of students scoring well on nutrition quizzes	PH Administrator	
P-GCSD	% of low sugar vending machines in schools	PH Administrator	
P-GCSD	% of schools providing targeted levels of healthy food options	PH Administrator	
P-GCSD	% of students participating in age-appropriate physical activity	PH Administrator	
P-GCSD	% of students in quarterly in-school monitoring of activities	PH Administrator	
P-GCSD	% of food service staff & vendors trained in healthy choices	PH Administrator	
P-GCSD	% of staff trained in campaigns for student and parent awareness	PH Administrator	

Predefined Reports are a convenient way to export information to Excel or another format.

Strategy Maps

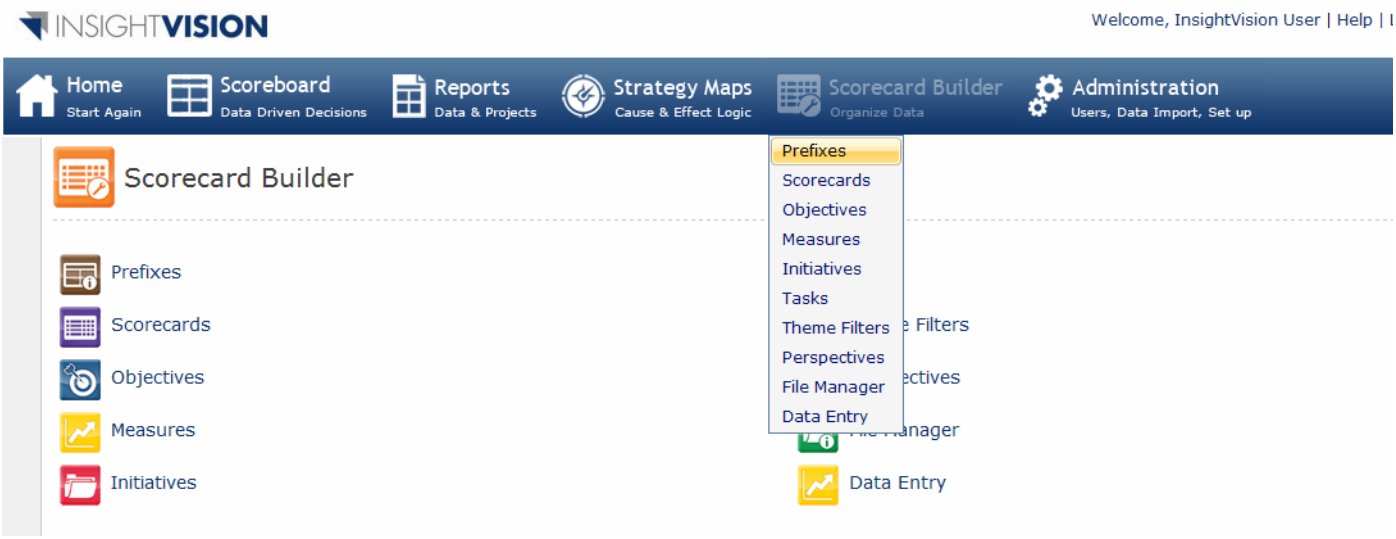
Strategy Maps are an important part of the Balanced Scorecard methodology. They can be displayed in multiple ways on the Strategy Maps page. The most common ways to view strategy maps are:

- JPG Images (static, but they work in any Browser)
- Interactive Visio files (requires Internet Explorer and the free Visio 2010 Web Viewer to view)
- Interactive PDF files (which work on any browser with a PDF viewer)



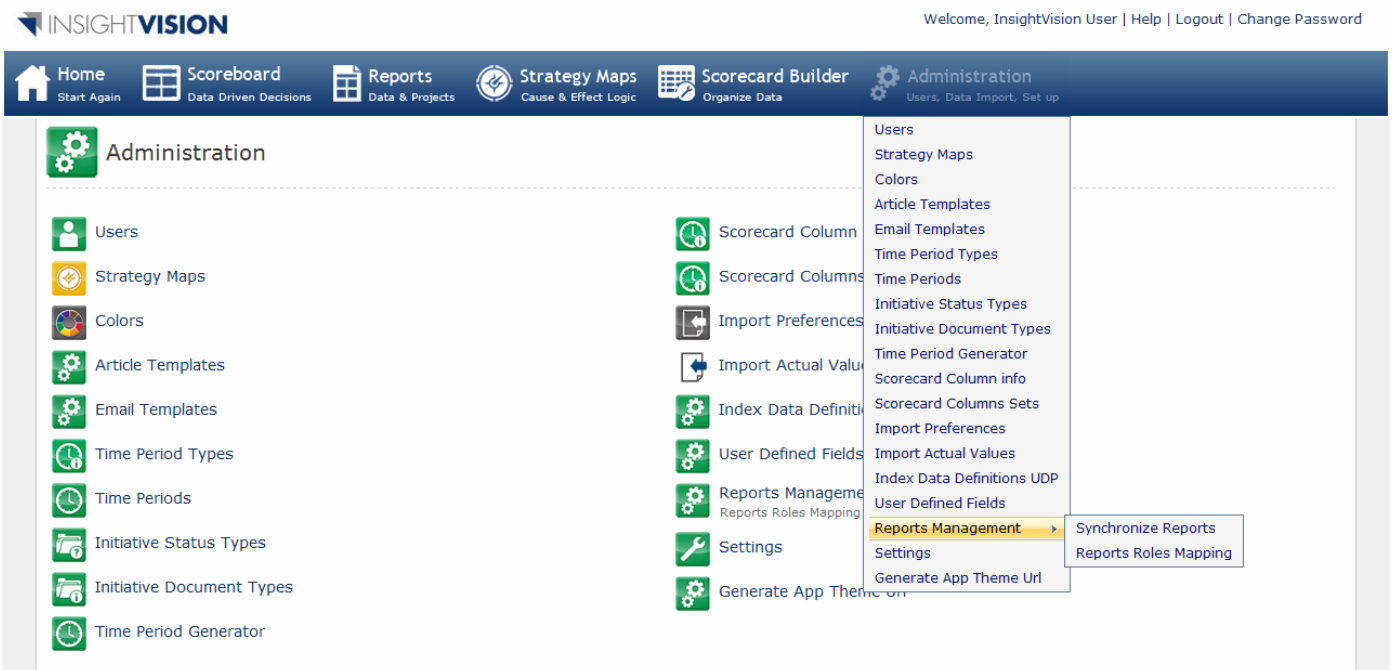
Scorecard Builder

Selecting **Scorecard Builder** from the menu bar displays a menu of commands that lead to various pages for creating scorecards and related elements, such as prefixes, objectives, measures, initiatives, and tasks. The menu also has options for defining perspectives and managing files (uploading files from a personal computer to the online file management system).



Administration

Selecting **Administration** from the menu bar displays a menu of commands that lead to various pages for setting up user access and defining default field values and other settings for the application, such as time period types and time periods, initiative status types, initiative document types, scorecard column descriptions and column sets, import rules and value sets, and index definitions.



Views

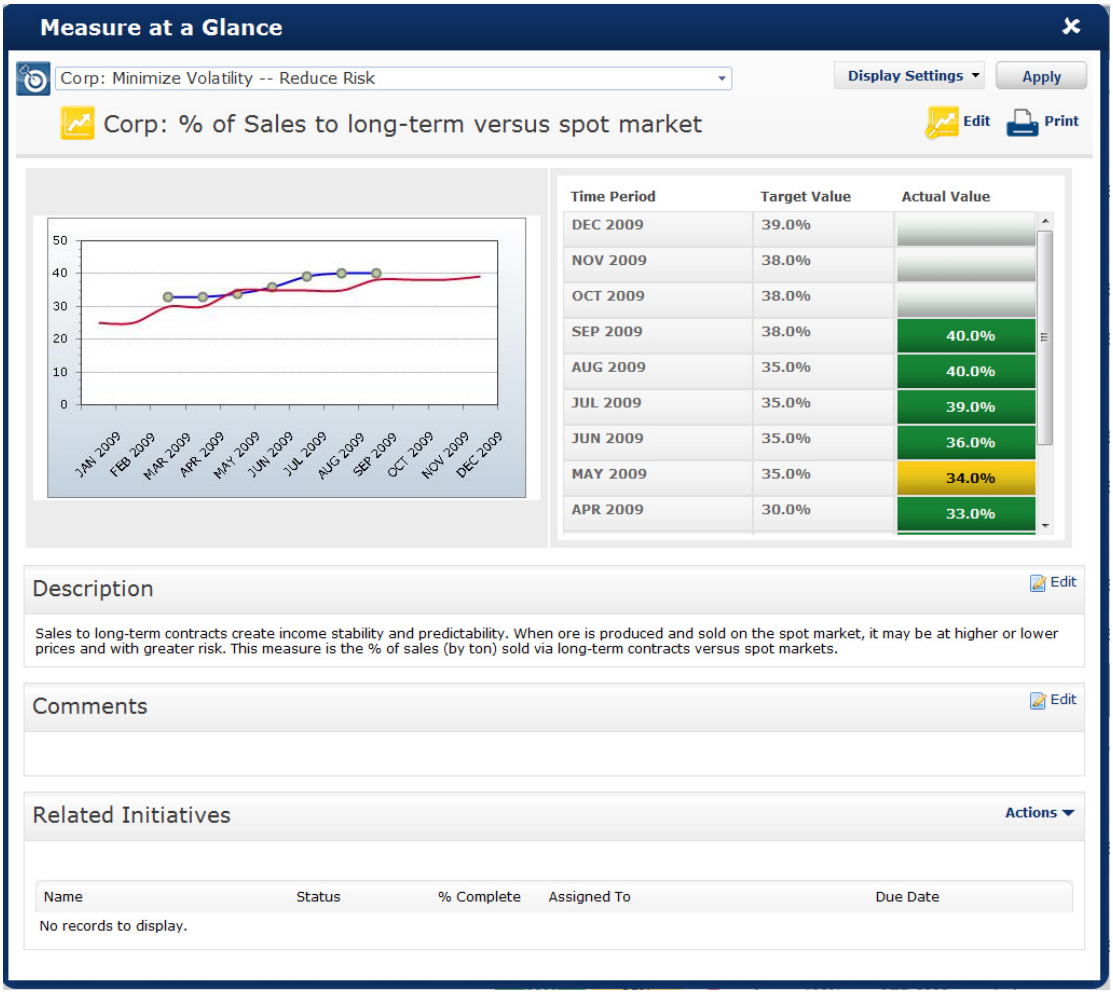
Views, which are not accessible from the menu bar, are an important part of the application. Views include both pages and pop-up windows that appear when certain icons or links are clicked on the Home page, Scoreboard page, in reports, and in other places in the application. Views display information in the context that supports analysis and action.

Views include the following:

- ***Measure at a Glance View*** on page 10
- ***Objectiveboard*** on page 11
- ***Objective Presentation View*** on page 12
- ***Measureboard Page*** on page 13
- ***Initiative Presentation View*** on page 14

Measure at a Glance View

The Measure at a Glance view displays detailed quantitative and qualitative information about a Measure. It includes a chart and list of data values along with detailed descriptions. It also displays a list of any Initiatives that have been associated to this Measure. It is accessed by clicking on the name of Measures on the Home page and the Scoreboard page. (It can also be accessed by clicking on the trend arrow or chart thumbnails.

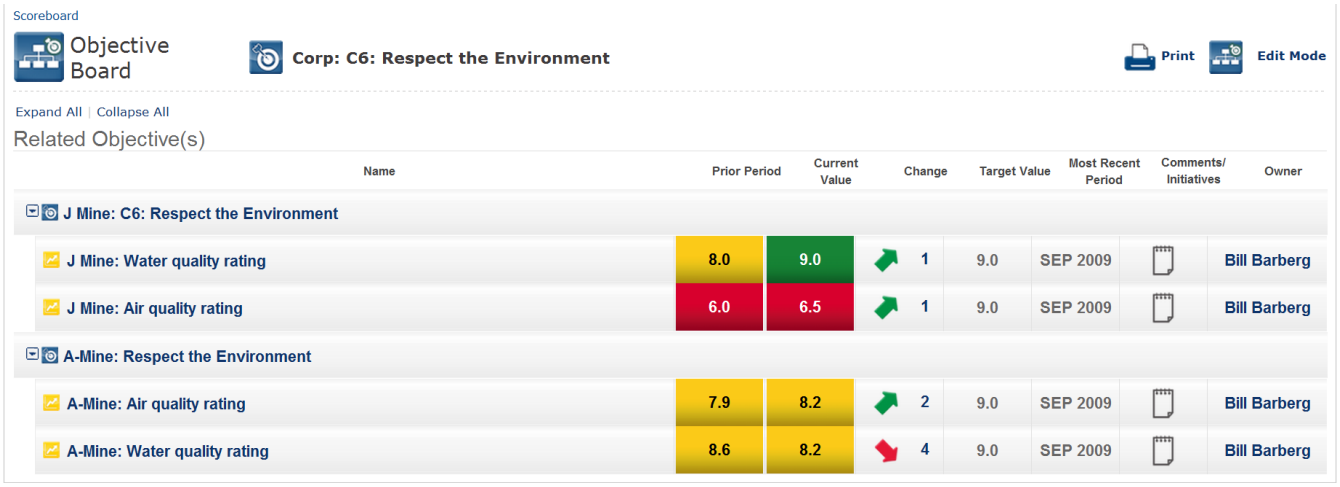


Objectiveboard

The Objectiveboard page is a drill-down View that is similar to the Scoreboard page, but it displays the Objectives and Measures that are related to another specific Objective. Instead of showing a "balanced" set of Objectives and Measures (organized by Perspective), it shows the Objectives and Measures that are drivers of a particular Objective that the User drilled-down from. This is part of the "Zoomability" that makes InsightVision so powerful. The most common Objectives displayed are:

- More detailed Objectives that clarify the strategy and provide additional information, Measures and links to Initiatives.
- Causal "drivers" that may be on the same strategy map or scorecard, but they may be in a lower Perspective (and cause & effect logic flows from the bottom of a strategy map upward).
- Cascaded Objectives that are similar, but in a more detailed geography, division or Theme.

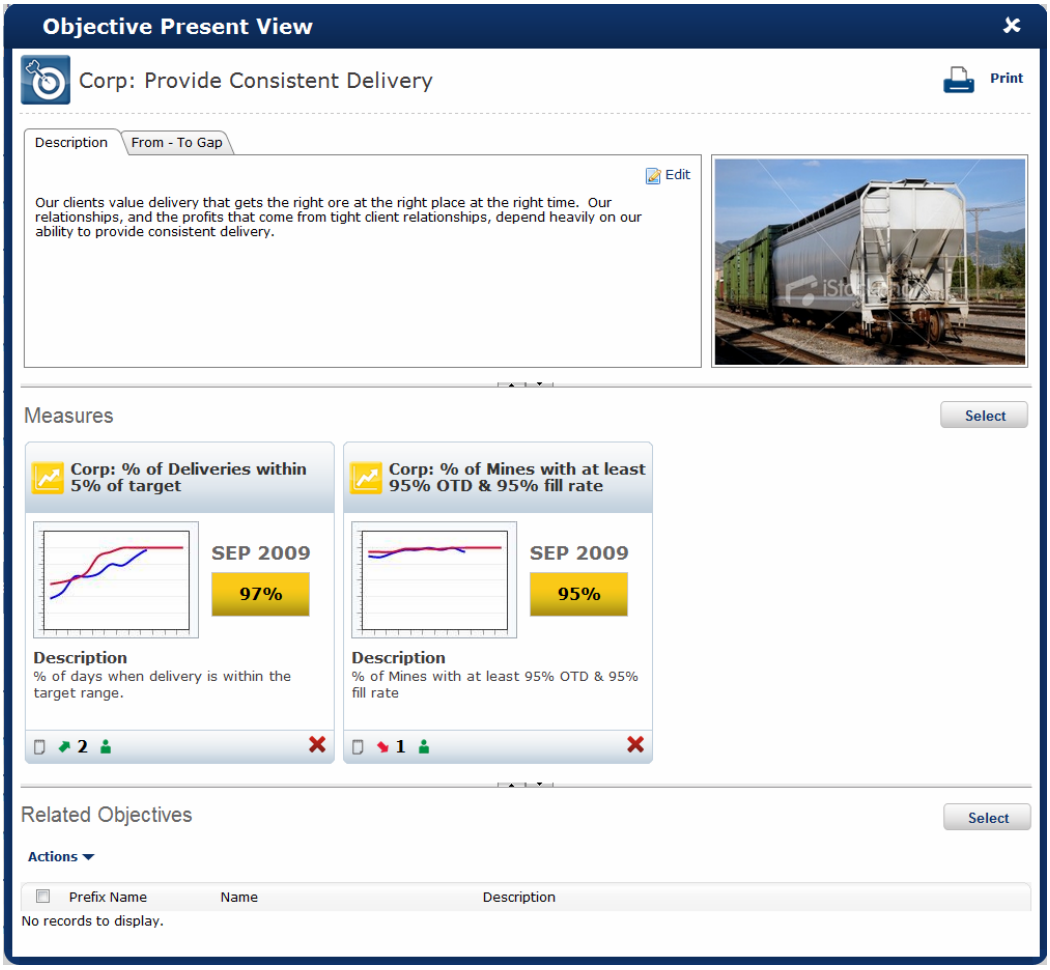
The functionality of the Objectiveboard page is very similar to the Scoreboard page.



Objective Presentation View

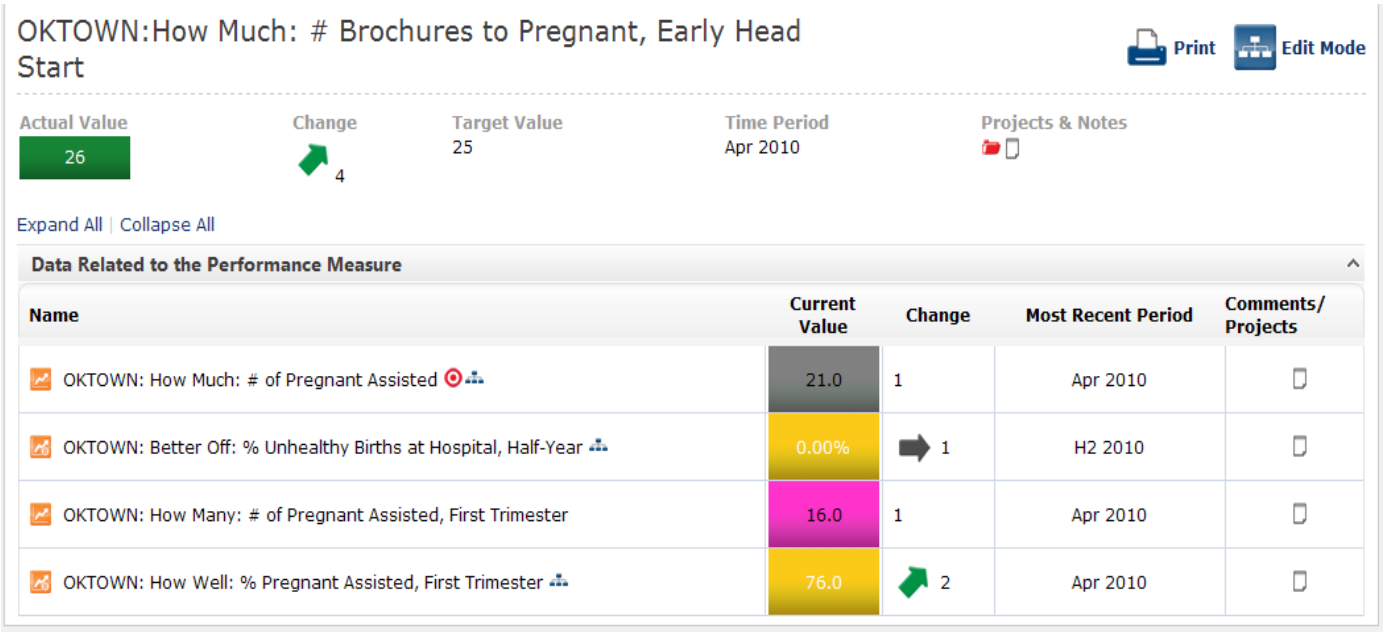
The Objective Presentation view contains tabs that describe the Objective and the “From-To Gap” for that Objective. These are rich text HTML displays, and the Description tab may contain a link to an associated wiki page. This view also contains Measure tablets for the Measures associated with the Objective.

The Objective Presentation is typically accessed by clicking on the Objective name on the Scoreboard or by clicking on the Objective on the Strategy Map. If an alternate hyperlink (e.g. a link to the wiki page) has been defined for an Objective, this view can still be accessed by clicking on the Objective icon to the left of the Objective name in the Scoreboard page.



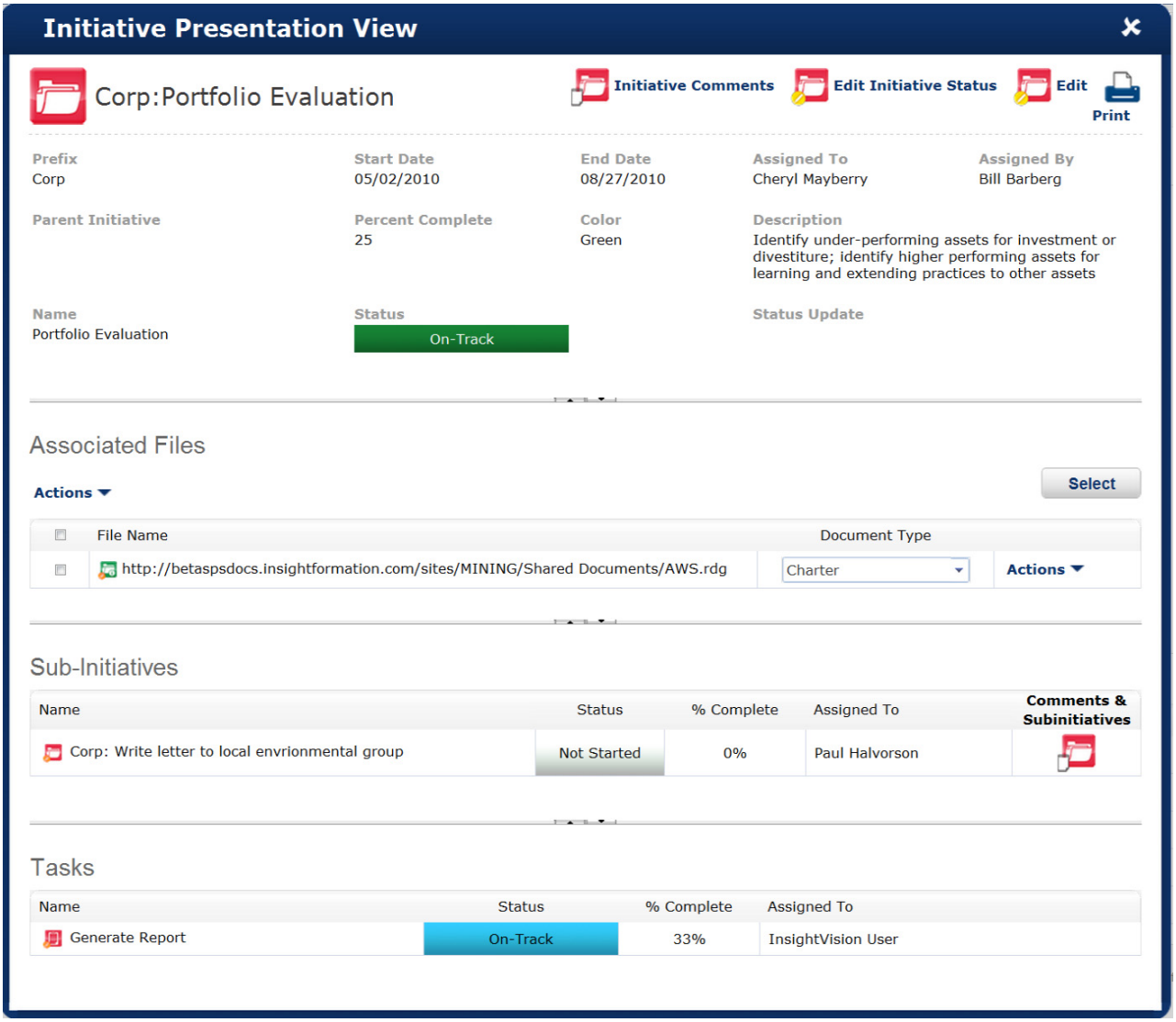
Measureboard Page

The Measureboard is similar to the Scoreboard but it only displays Measures (not Objectives) that are related to another Measure (the one shown to the top of the page). The Measures displayed are either “Sub-Index Measures” used to calculate the Measure displayed on the top or “Related Measures” specifically selected for drill-down analysis. The Measureboard is accessed by clicking on the tree icon next to a Measure on the Scoreboard page.



Initiative Presentation View

The Initiative Presentation view displays detailed information about an Initiative and the sub-Initiatives and Tasks related to it. It can include links to uploaded files (such as status reports, presentations, or budget spreadsheets). Different users will have different options for adding comments, updating the Initiative Status, or Editing the entire Initiative. This View is accessed by clicking on the initiative name on the Home page or by clicking on the Initiative name in a list that pops up after clicking on the Initiatives icon on a Measure on the Scoreboard.



Chapter 2: InsightVision Records

Introduction

Users specifically authorized as “Scorecard Builder” add records in the application. The records are then available for viewing throughout the application. This chapter describes the main types of records used in the InsightVision application, which include the following:

- *Users* (described below) Adding and maintaining users requires “Administrator” authorization.
- *Perspectives* on page 16
- *Prefixes* on page 16
- *Scorecards* on page 17
- *Objectives* on page 18
- *Measures* on page 19
- *Initiatives* on page 21
- *Tasks* on page 22
- *Strategic Themes* on page 23

Users

A User record is added in the application for each person allowed to use the application. A User record contains information about a user, such as their name, username, E-mail address, password, and security authorizations (which application functions or records they can access), and some default preferences.

A User record includes the following information about a user:

- First Name
- Last Name
- E-Mail Address (this becomes the login name)
- Default Prefix, optional (see *Prefixes* on page 16)
- Activity Status (Active or Inactive)
- Primary role assigned (Administrator, Scorecard Builder, Presenter, Read-Only Presenter)
- Secondary role(s) assigned (Allow File Upload, Actual Value Approver, Journalist)
- Scorecards assigned (see *Scorecards* on page 17)
- Measures maintained
- Objectives, Measures, and Initiatives owned by this User

Perspectives

Perspectives are often based on the Balanced Scorecard approach that uses four perspectives, but there is no limit to the number of Perspectives or what names are used. In the InsightVision application, Perspectives are set up by default as Financial, Customer, Internal Processes, and Learning & Growth.

Perspectives have Objectives assigned to them, which are linked (assigned) to Scorecards.

When a Scorecard is viewed on the Scoreboard page, the Objectives linked to the Scorecard are displayed in sections based on the Perspectives they are assigned to.

Each organization can change the names of these or set up additional Perspectives. If the Balanced Scorecard approach is not being used, the Perspectives can be any category for Objectives and Measures.

Each Perspective record includes the following:

- Name of the Perspective
- Description
- Document Link (to a document file) This is rarely used, but it can be a link to a wiki or uploaded document that describes the Perspective. If this field is used, clicking the Perspective name opens this content.

Prefixes

A Prefix is a short code that is optionally assigned to Objectives, Measures and Initiatives to help categorize them and to differentiate between similar Objectives, Measures or Initiatives that may be for different departments or geographies. Prefixes are part of a systematic way to create unique names without requiring users to rely on naming conventions.

A Prefix can be assigned to any Objective, Measure, or Initiative record.

Prefixes typically appear to the left of the name, but they can be configured to display or not display the prefixes in various scenarios.

For example, if several Objective all have the same name (such as “Reduce Accidents”), but each record is for a different division, a different prefix can be assigned to each Objective to distinguish it as belonging to a specific Division (such as US, INTL, MFG, IT, etc.).

A Prefix record includes the following information:

- Prefix Name (either a short code or a slightly-longer name)
- Description
- Active Status (Active or Inactive)

Scorecards

A Scorecard record is used as a device for linking Objectives so they can be viewed in one place — usually on the Scoreboard page (see page 4) or on a Strategy Map.

NOTE: *On the Scoreboard page, each user can select a Scorecard to view details about the Objectives and Measures that are linked to that Scorecard.*

In addition, Scorecards can be linked to other Scorecards using a "parent" and "child" relationship. This provides the option of having levels of scorecards that are "nested" inside of each other. This creates a Scorecard hierarchy that can be expanded or collapsed by users trying to select a specific Scorecard.

Scorecard records are also used as a method for authorizing and controlling user access to information. If a user is given access to a Scorecard, that user can select that Scorecard (or any "nested" descendants of that Scorecard) on the Scoreboard page (and in other places) and view the details of the Objectives, Measures and Initiatives that are linked to that Scorecard.

A Scorecard record includes the following information:

- Name of the Scorecard
- Parent Scorecard, (if applicable, Scorecard to which the Scorecard is a "child" in the hierarchy)
- Owner (User for the person assigned responsibility for the Scorecard)
- Column Set Name (determines the columns that appear when the Scorecard record is viewed on the Scoreboard page)
- Published or Unpublished (designates whether or not the Scorecard record is available for viewing on the Scoreboard page)
- Document Link (to a document file) This is typically left blank.
- Objectives linked (assigned) to the Scorecard
- User Assignment (Users given authority to access the Scorecard)

Objectives

An Objective record is added in the application for each of the Objectives that the organization or community wants to achieve and monitor. The name of an Objective is generally a positive statement (often starting with a verb) written by the leadership team, such as *Improve Customer Satisfaction*.

Each Objective is linked to one or more Scorecards. In addition to being viewed on the Scoreboard page and the Objectiveboard page, Objective information can also be viewed on the Objective Presentation view.

An Objective may have one or more Measures linked (assigned) to it.

An Objective record includes the following information:

- Prefix, optional (see *Prefixes* on page 16)
- Owner who is responsible for defining, monitoring and reporting on this Objective
- Name of the Objective
- Scorecard Reference # used to identify this objective. This is an optional part of an Objective's name. This supports the popular BSC convention of using a letter and number to identify Objectives and Measures, like C2 for the second Objective in the Customer Perspective or P4 for the fourth Objective in the Process Perspective.
- Description about the Objective
- Image file link (picture that illustrates the Objective)
- Measure assigned to measure and monitor the performance of the Objective (see *Measures* on page 19)
- Perspective (see *Perspectives* on page 16)
- Short name which may be used to display on Strategy Maps or in reports for more compact viewing. This is typically left blank unless Objective names are very long and a shorter version is useful
- Document Link (to a document file or to a wiki page). If this field is populated, clicking the name of the Objective will open this link instead of the Objective Presentation view.
- Objectives assigned as "Related Objectives" to this Objective. These are typically "causal drivers" or "cascaded Objectives"
- From - To Gap description about the current status and the goal of this Objective.

Measures

A Measure record is added in the application for each of the Measures that have been chosen to monitor Objectives. Each Measure represents a quantitative (#, %, $) performance indicator of the Objective.

Each Measure is linked (assigned) to one or more Objectives and can be viewed on the Scoreboard page along with the Objective record(s).

Measure details can also be viewed on the Home page, in some reports, and on various Views. In particular, Measure details can be viewed on the Measure at a Glance view, where Measure details can be analyzed and additional information can be entered during collaborative meetings (see page 10).

An important feature of a Measure is “Data Entry,” which is the entry of quantitative “Targets,” “Data Values” and “Color Bands,” described below.

- For Measures, Data Values consist of historical numerical performance data along with desired target data values. The InsightVision application plots the entered performance data values and the target data values as two separate lines in a line graph, which is used as a visual aid for quickly viewing the performance data changes over time and comparing them to the target values. The trend chart appears in the application as part of a Measure’s details.
- Color bands are colors chosen to represent various ranges of data and give users a quick reference to the performance of a measure (red = poor, green = good, etc.). The colors appear as rectangles of color around data values when they display on the Home page, Scoreboard page, and in views and reports.

A Measure may also have one or more Initiatives linked to it (for Initiatives that may affect the Measure).

A Measure may have one or more User s assigned to it as “Maintainer”. A User who is a Maintainer has the authority to enter data values for that particular Measure record, even if the User is not a Scorecard Builder.

A Measure record includes the following information:

- Prefix, optional
- Name of the Measure
- Description
- Polarity (Direction Type — defines if upward or downward data movements are positive, negative, or neutral; this determines the color of the arrow that appears in the application as part of an Measure’s details as red, green, or grey)
- Scorecard Reference #. This is an optional part of a Measure’s name. This supports the popular BSC convention of using a letter and number to identify Objectives and Measures, like C2M1 for first Measure of the second Objective in the Customer Perspective or P4M2 for the second Measure for the fourth Objective in the Process Perspective.
- Time Period Type (defines the type of time period to be used for adding time periods and data values, such as year, quarter, month)
- Unit-of-Measure (for the data values, such as #, %, $) This also specifies the number of decimal places to be included.
- Owner (User record of the person who is assigned accountability for the Measure)
- Objective to which the Measure is linked (assigned), (Objectives the Measure is intended to monitor)
- Document, Report, and Analysis Links (hyperlinks to documents, websites, or other files)
- Trend Chart Settings (sets the lower and upper values of the trend graph for the Measure so that the plotted data line stays within the bottom and top boundaries, the height, of the graph; and sets the number of time periods of data values to include in the plotted line)

- Measure Type, Basic or Calculated (identifies if the data values for the Measure record are entered directly or if they are calculated automatically by combining data values entered for other Measures)
- Calculation Method (if the Measure Type is Calculated, identifies the method used for combining the Measures, such as add, divide, or multiply)
- Measures Used to Calculate (if the Measure Type is Calculated, identifies the Measures being combined and defines how they are being combined, such as add Measure 1 to Measure 2, or divide Measure 1 by Measure 2)
- Data Values (Data Entry — the actual statistical data values for each time period based on the Time Period Type; Data Values are entered directly, imported from a spreadsheet, or calculated as described above; Color bands can be applied to ranges of data values; the application uses the Data Values to generate the trend graph for the Measure)
- Measure records assigned as “Associated” to the Measure (Measure that have an indirect relationship with the Measure; are also called “Related”)
- Maintainers (Users assigned authority to enter data values for the Measure record)

Initiatives

An Initiative record is added in the application for each Initiative that the organization wants to monitor. Each Initiative record is linked to one or more Measures that it is intended to significantly affect.

Initiatives can be linked to other Initiatives using a "parent" and "child (Sub-Initiative)" relationship. This provides the option of having levels of Initiatives that are "nested" inside of each other. (An Initiative can have only one parent Initiative but can have multiple child, Sub-Initiatives.)

Initiatives and Sub-Initiatives may have one or more Tasks linked to them (see *Tasks* on page 22).

In addition, Initiatives may be linked (assigned) to one or more Measures.

Initiative details can be viewed on the Home page (see page 3), in some reports, and on various Views.
In particular, Initiative record details can be viewed on the Initiative Presentation view and in the Initiative Monitor report

An Initiative record includes the following information:

- Prefix, optional (see *Prefixes* on page 16)
- Name of the Initiative
- Description
- Parent Initiative assigned to the Initiative (if applicable, Initiatives to which the Initiative is a "child," which actually makes the Initiative a Sub-Initiative to the parent Initiative)
- Status of the Initiative
- Status Update description
- Color Code (designates the background color that appears with the Initiative Status)
- Status Update description
- Percent Complete
- Measures to which the Initiative record is linked, (Measures the Initiative is intended to have an effect upon).
- Assigned To User (the person who is assigned accountability for the Initiative)
- Assigned By User (the person who designated the Assigned To user--often the sponsor or executive champion)
- Start Date for the Initiative
- End Date for the Initiative
- Charter Document Link (to a document file)
- Tasks linked (assigned) to the Initiative.
- Sub-Initiatives linked to the Initiative (Initiative to which the Initiative is a "parent")
- User-Defined Fields (additional Initiative information based on organizational requirements, such as Budget, Spent to Date, and Remaining Costs to Complete)
- Associated Files (links to one or more files that can be assigned a document type that identifies the contents of a file, such as Status Report, Financial Document, Presentation, etc.)

Tasks

Task records are added in the application for activities that the organization wants to monitor. Tasks are usually linked (assigned) to Initiatives and represent individual activities required to complete a Initiative. Tasks can be renamed as "Milestones."

Tasks can be viewed on the Home page and in some reports (see page 3).

A Task includes the following information:

- Name of the Task
- Description
- Parent Initiative to which the Task is linked (assigned)
- Sub-Initiative to which the Task is linked (assigned), (applies only if the parent Initiative has one or more Sub-Initiatives)
- Status of the task
- Color Code (designates the background color that appears with the task Status)
- Percent Complete
- Assigned To User (the person assigned responsibility for the Task)
- Assigned By User (the person who designated the Assigned To user)
- Start Date for the task
- End Date for the task
- Charter Document Link (to a document file)
- PM Task Number (if an organization uses a Initiative management numbering system)
- Associated Files (links to one or more files that can be assigned a document type that identifies the contents of a file, such as Status Report, Financial Document, Presentation, etc.)

Strategic Themes

It is an increasingly popular practice to organize Balanced Scorecard content by Strategic Themes, often just called “Themes.” In some cases, Themes are used to focus in on a Strategy Map and only view or discuss certain measures. In other cases, Themes proved an opportunity to create a more detailed Scorecard or Strategy Map.

Theme Filters are used to restrict the display on the Scoreboard page to just the Objectives that are in that Theme (along with related Measures and Initiatives).

Theme Filter records contain a name and a description. Objectives are then associated with the Theme Filter. Objectives can be associated with more than one Theme Filter

A Theme includes the following information:

- Name of the Theme
- Description
- Owner or person responsible for reporting on this theme
- Document Link (to a document file)
- Objectives which are linked (assigned) to this Strategic Theme

NOTES:

Chapter 3: Initial Startup

Introduction

Before you use the InsightVision 2.0 application, you should check the settings of the Internet browser application on your computer, watch for and open your introductory e-mail message that provides your login information, use the information provided in the e-mail to start and log into the application, add the application website URL to your favorites and/or create a desktop shortcut, and change your pre-assigned password.

This chapter includes the following sections:

- *Internet Browser Settings* (below)
- *First-Time Login* on page 26

Internet Browser Settings

Although the InsightVision 2.0 application works in most Internet browser applications, Microsoft Internet Explorer (IE), Version 7 or 8, is the recommended browser application. The IE application default settings should be used.

To check the IE default settings, select **Tools**, **Internet Options** from the IE menu. This displays the Internet Options dialog box.

Click the **Security** tab. Under *Select a Zone to view or change security settings*, click **Internet** and then, under *Security Level for this zone*, use the slider and set the level at Medium-High or lower.

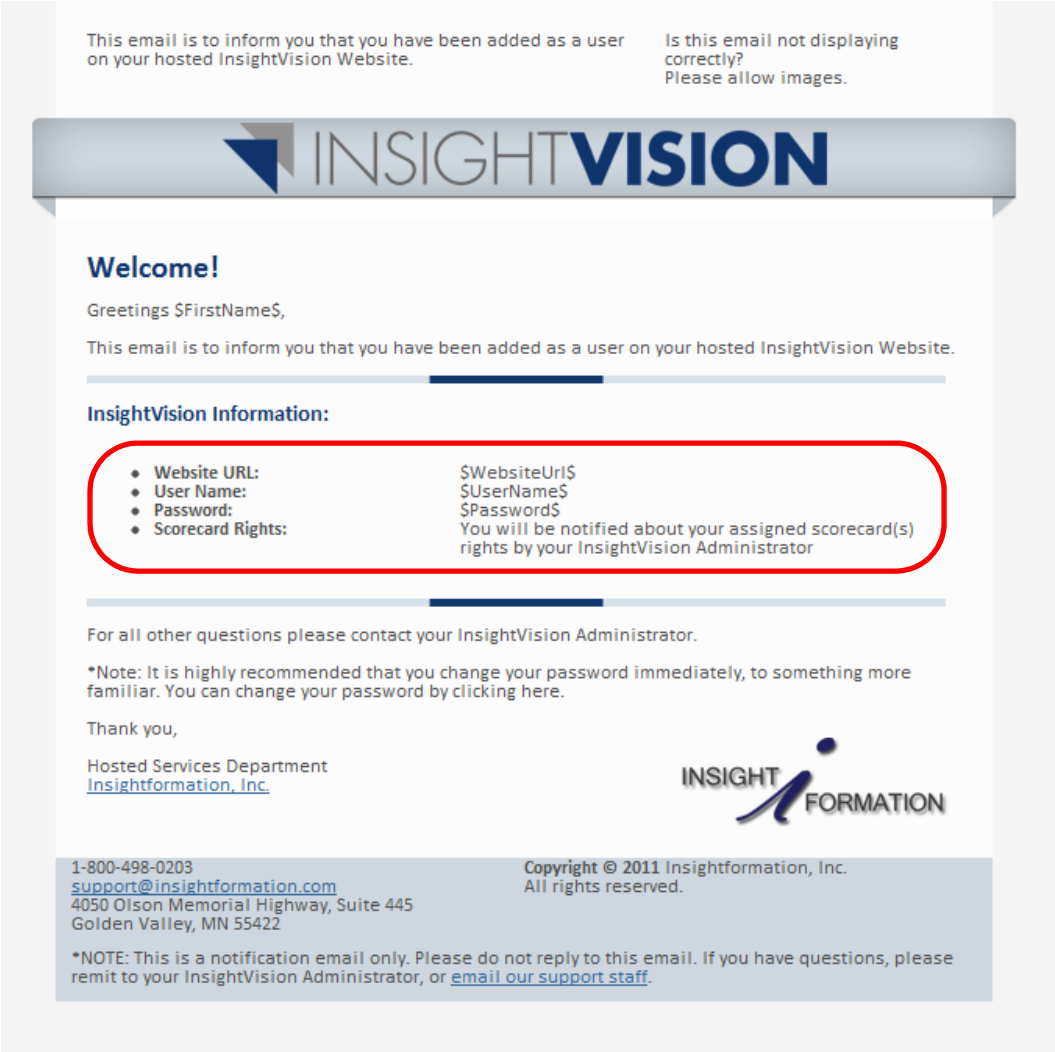
NOTE: *If you use a browser application other than IE or do not reset the IE default settings, set the Internet options to enable Javascript, save cookies, and open pop-ups. (In FireFox, select Tools, Options from the menu; in Safari, select Safari, Preferences, Security, Web Content).*

First-Time Login

To start and log into the InsightVision 2.0 application for the first time, you need the Website URL for the application, a User Name, and a password. You should receive this information in an introductory e-mail message from InsightVision Hosted Services.

Introductory E-mail Message

After your system administrator adds you as a user in the InsightVision 2.0 application, you will receive an introductory e-mail message similar to the one shown below. The message contains your InsightVision user information and a link for starting the application.



This email is to inform you that you have been added as a user on your hosted InsightVision Website.

Is this email not displaying correctly?
Please allow images.

INSIGHTVISION

Welcome!

Greetings $FirstName$,

This email is to inform you that you have been added as a user on your hosted InsightVision Website.

InsightVision Information:

- **Website URL:** $WebsiteUrl$
- **User Name:** $UserName$
- **Password:** $Password$
- **Scorecard Rights:** You will be notified about your assigned scorecard(s) rights by your InsightVision Administrator

For all other questions please contact your InsightVision Administrator.

*Note: It is highly recommended that you change your password immediately, to something more familiar. You can change your password by clicking here.

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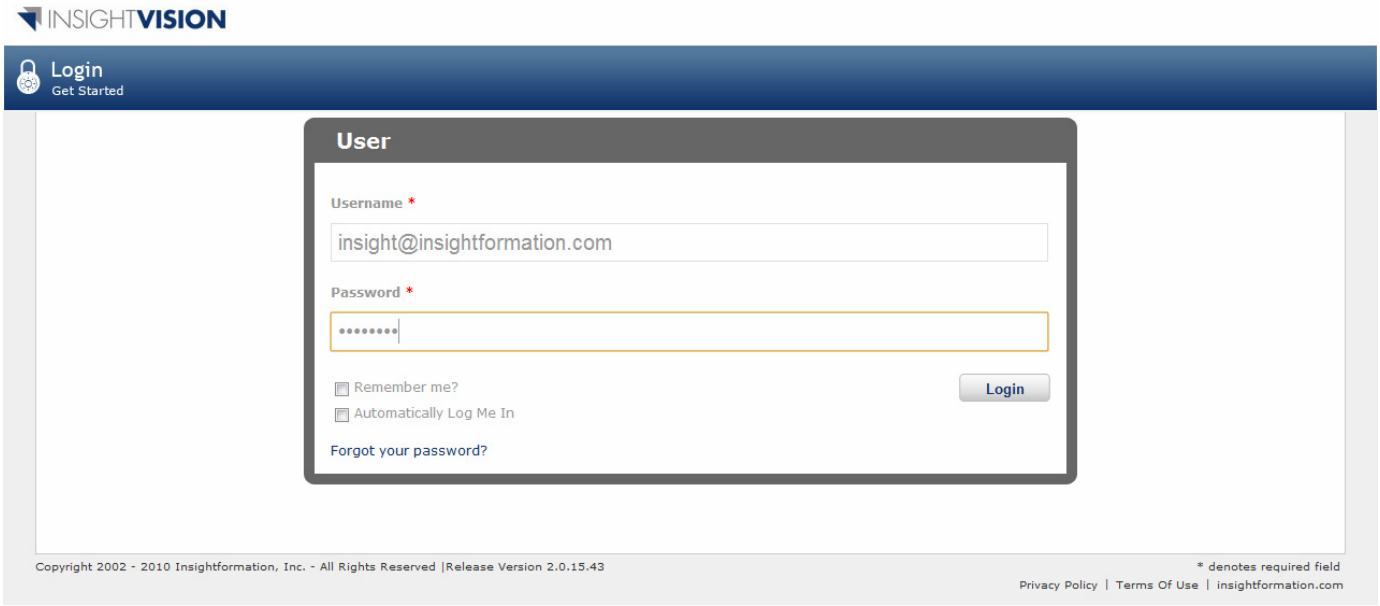
*NOTE: This is a notification email only. Please do not reply to this email. If you have questions, please remit to your InsightVision Administrator, or email our support staff.

To begin using the InsightVision 2.0 application, click the **Website URL link** in the e-mail message. This opens the application in your default Internet browser application and displays a Login page (shown in the next section).

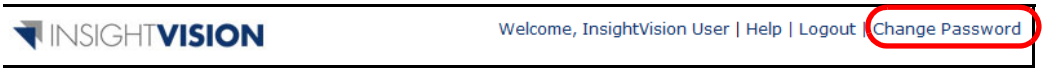
Login Page

When you start the InsightVision 2.0 application, the Login page opens in the Internet browser application window.



With the Login page displayed, add the login URL to your Internet Explorer favorites and/or create a shortcut on the Windows desktop to use for starting the InsightVision application in the future. (To add to favorites or create a shortcut, right-click into a white area of the page and select **Add to Favorites** or **Create Shortcut** from the menu that appears.)

After adding the URL to your favorites or creating a shortcut, type the User Name and Password provided in the e-mail message into the **Username** and **Password** fields and click the **Login** button. This opens the Home page of the application. Your name appears at the top right side of the page, as shown below.



IMPORTANT: Immediately change your password from the provided password to a password of your choice.

NOTES:

Chapter 4: Common Procedures

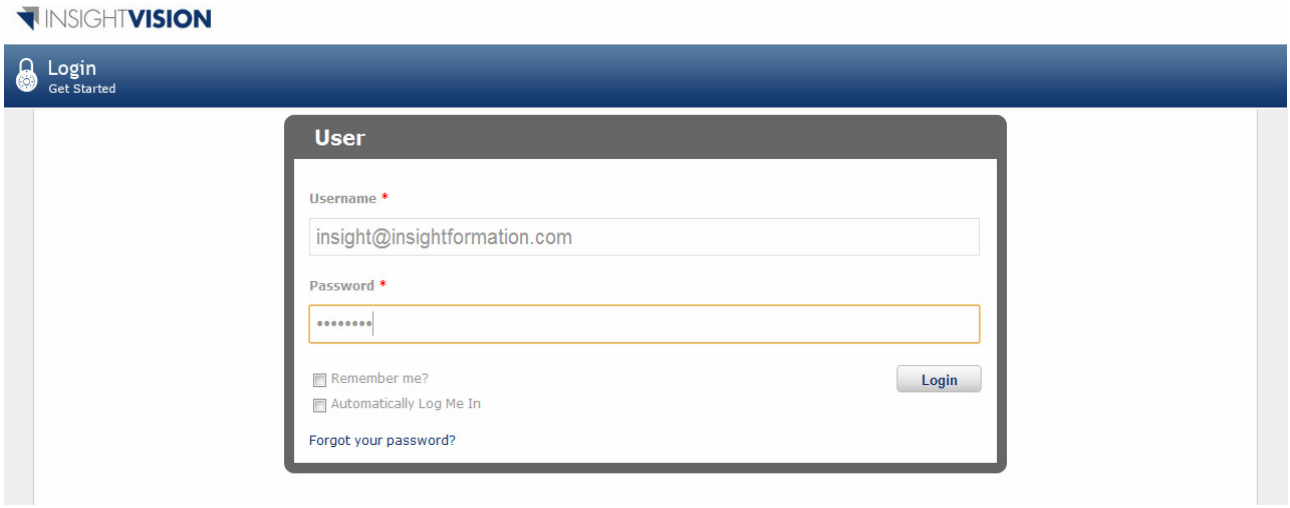
Introduction

This chapter includes the following procedures that are common to all the modules in the InsightVision application:

- *Begin a Session* (below)
- *Replace a Forgotten Password* on page 30
- *Change Your Password* on page 31
- *End a Session* on page 32

Begin a Session

To begin a session in the InsightVision application, start and login to the application. To start the application, use the favorites link or the desktop shortcut that you added during your initial startup of the application. See *First-Time Login* on page 26. This opens the Login page in the Internet browser application window.

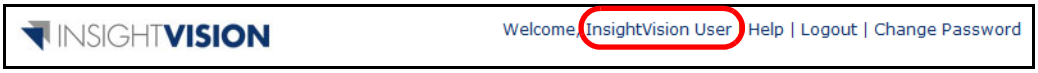


Enter your Username and password into the **Username** and **Password** fields.

Optionally, select the **Remember me?** checkbox to have the login fields complete automatically each time you start the application and select the **Automatically Log Me In** checkbox to bypass the login screen and automatically log in each time. It is recommended that you check both of these boxes. If you want to log-out for security purposes when you are completed with a session, you can click the **Logout** link in the top right corner of the screen.

NOTE: *If you cannot remember your password, enter your username in the Username field and click the* ***Forgot your password?*** *link. For details, see Replace a Forgotten Password on page 30.*

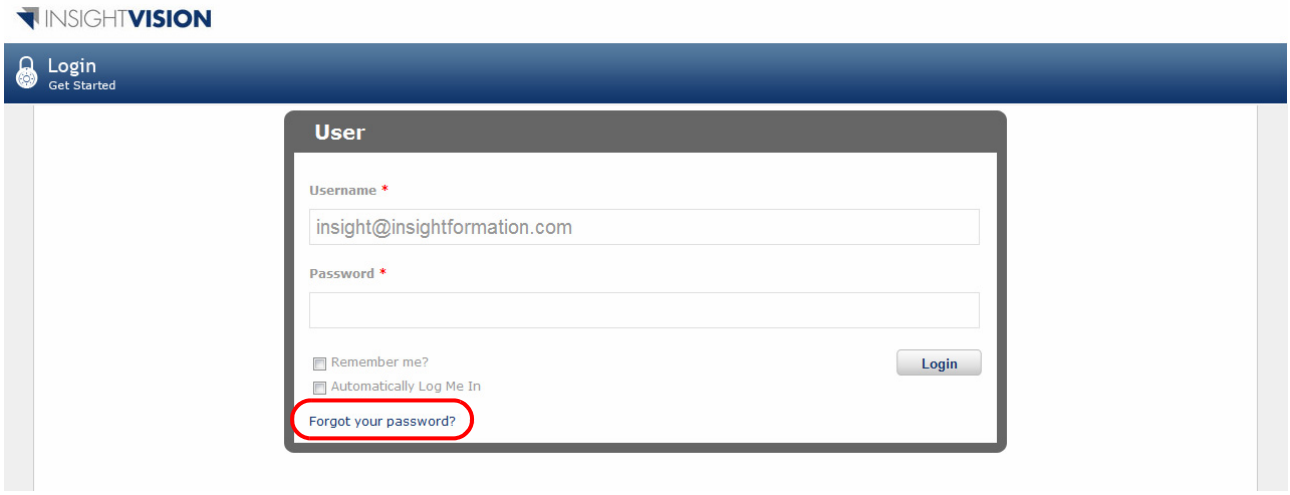
Click the **Login** button. This opens the Home page of the application. Your name appears at the top right side of the page, as shown below.



Replace a Forgotten Password

When you start and login to the application, if you cannot remember your password, you can request a temporary password from the InsightVision Hosted Services Department.

To request a new password, start the application using the favorites link or the desktop shortcut that you added during your initial startup of the application. See *First-Time Login* on page 26. This opens the Login page in the Internet browser application window.



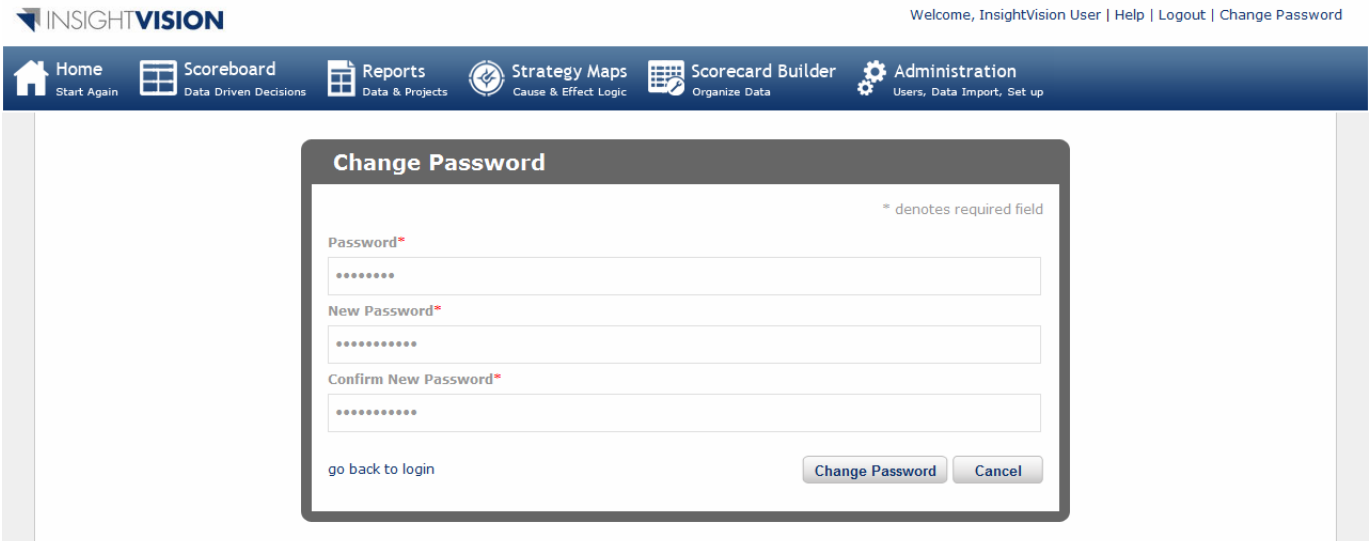
Enter your username in the **Username** field and click the **Forgot your password?** link.

A reset confirmation message box appears. Click the **OK** button to continue.

Close the Internet Explorer window by clicking the **X** icon in the upper right corner of the window.

Check your e-mail for a password recovery e-mail message from the Insightformation (InsightVision Hosted Services). The message contains a temporary password and a link for changing
the password.

Click the **Click here** link in the e-mail message. This starts the InsightVision application and displays the Change Password dialog box.

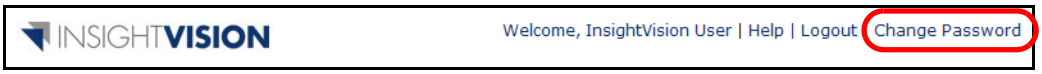


Type the password provided in the e-mail message into the top **Password** field (or copy it from the e-mail message and paste it into the field).

Type a new password of your choice into the **New Password** field and the **Confirm New Password** field.

NOTE: *The new password must have a minimum of five characters.*

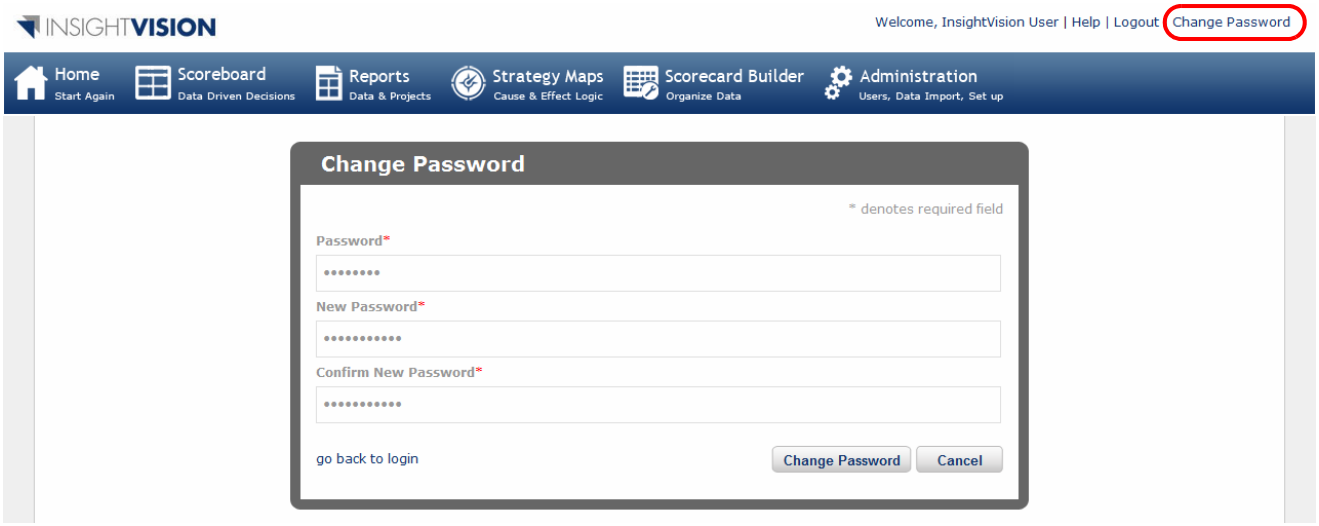
Click the **Change Password** button. This logs you into the application and opens the Home page. Your name appears at the top right side of the page, as shown below.



Change Your Password

To change your password, start the application using the favorites link or the desktop shortcut that you added during your initial startup of the application. See *First-Time Login* on page 26. This opens the Login page in the Internet browser application window.

Click the **Change Password** link in the top right corner of the application window.

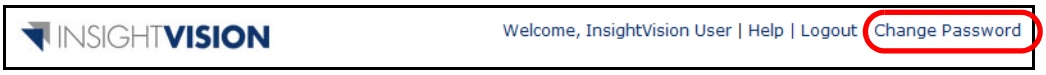


Type your current password into the top **Password** field.

Type a new password of your choice into the **New Password** field and the **Confirm New Password** field.

NOTE: *The new password must have a minimum of five characters.*

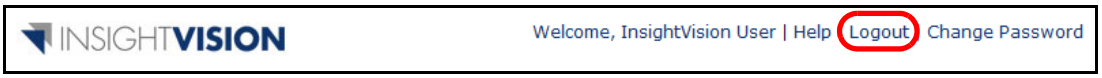
Click the **Change Password** button. This logs you into the application and opens the Home page. Your name appears at the top right side of the page, as shown below.



End a Session

To end a session of the InsightVision application do one of the following:

- Click the Logout link in the top right corner of the application window.



- Close the Internet browser application.
- Use the keyboard command, ALT + F4.

NOTE: *A InsightVision session automatically ends after 60 minutes of inactivity, but this time can be changed by an administrator to the desired setting.*

NOTES:

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