



Scorecard Builder User Guide

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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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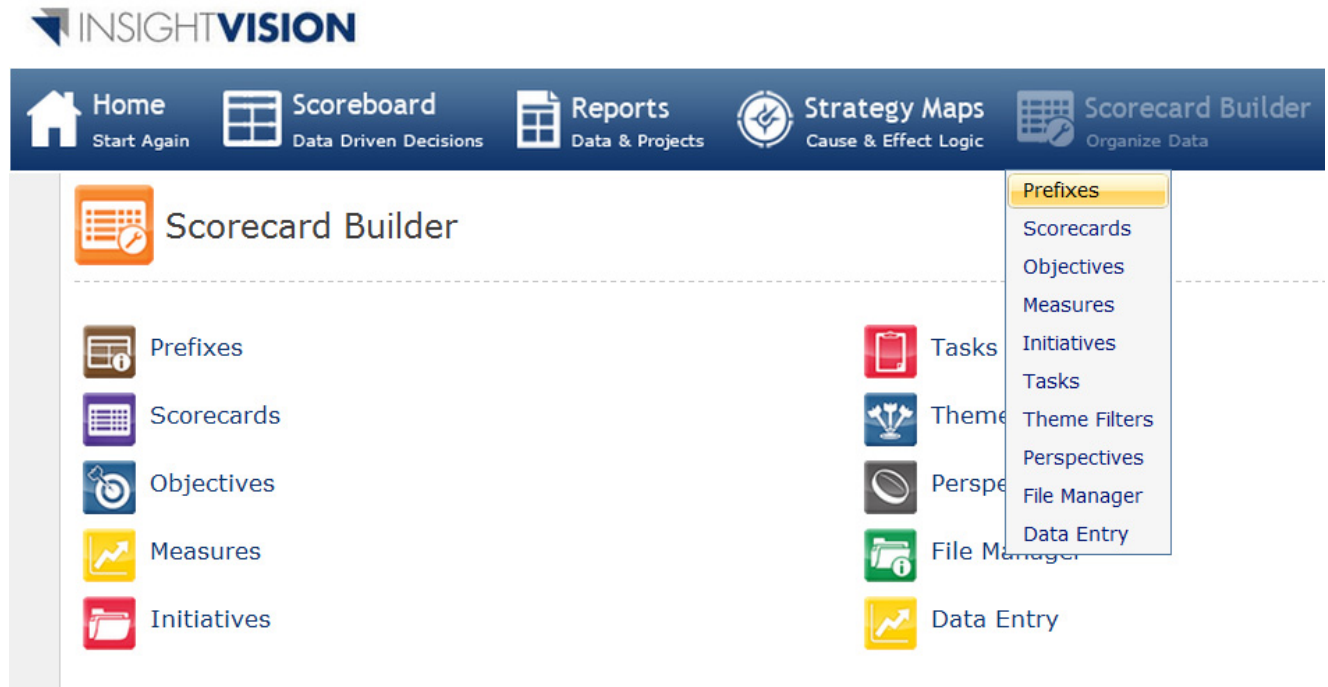
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Chapter 1: Introduction

This User Guide is for users who are assigned the role of either Scorecard Builder or Administrator. These users have access to the functions in the Scorecard Builder module.



Scorecard Builders are responsible for maintaining the following records in the application:

- Perspectives (see [Chapter 2: Perspectives](#) on page 3)
- Prefixes (see [Chapter 3: Prefixes](#) on page 11)
- Scorecards (see [Chapter 4: Scorecards](#) on page 19)
- Objectives ([Chapter 5: Objectives](#) on page 35)
- Measures (see and [Chapter 6: Measures](#) on page 49)
- Initiatives (see [Chapter 7: Initiatives](#) on page 63)
- Tasks (see [Chapter 8: Tasks](#) on page 81)

In addition, Scorecard Builders may be responsible for maintaining the following:

- entering historical, current, and forecast data values for Measures
- approving data entered by another user if assigned the role of Actual Value Approver
- uploading files from a personal computer to the database if assigned the role of Allow File Upload
- editing the Article area of the Home page if assigned the role of Journalist

NOTES:

Chapter 2: Perspectives

Overview

Perspectives are groupings used to organize Objectives and Measures in a scorecard (when displayed on the Scoreboard page) or Strategy Map. The term “perspective” is used because each perspective provides a different point of view for understanding and monitoring the strategy. In the Balanced Scorecard (BSC) Methodology, the cause and effect logic of a scorecard or Strategy Map flows from the bottom to the top. The classic perspectives recommended by BSC Co-creators Kaplan and Norton for for-profit businesses are:

- Financial
- Customer
- Internal Process
- Learning and Growth

These perspectives are the default perspectives for InsightVision, but the number and names of the perspectives can be changed.

For example, for Community Balanced Scorecards addressing health issues, the recommended Perspectives would be:

- Community Health Status
- Community Implementation
- Community Processes and Learning
- Community Assets

A large conglomerate organization (a large multi-division organization or a State Government) may use one set of Perspectives for the top level scorecard(s) and have different perspectives for cascaded scorecards, but it is recommended to keep the number of Perspectives to as few as practical.

In some cases, Perspectives may be used to categorize Objectives and Measures in different ways. For example, a business may add an additional set of Perspectives based on the seven Baldrige Criteria categories. Or a community may choose to add Perspectives for “Health Outcomes” and “Health Factors” so they can mirror the MATCH County Health Rankings.

Every Objective (along with its associated Measures and other information) can belong to only one Perspective.

This chapter includes the following sections for adding and maintaining Perspective records in the InsightVision application.

- [View the Perspectives List](#) on page 4
- [Add a New Perspective](#) on page 5
- [Edit a Perspective](#) on page 7
- [Delete a Perspective](#) on page 9

View the Perspectives List

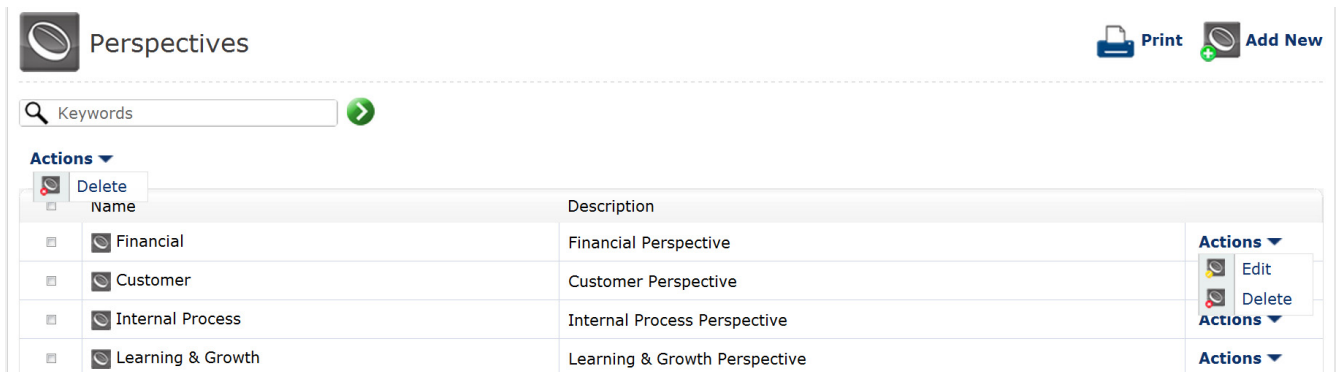
Purpose

Use this procedure to view the Perspectives page.

STEPS

1. From the Menu bar, select **Scorecard Builder / Perspectives**.

Perspectives Page



2. Notice the following about the Perspectives page:

- The Perspective list has a column heading line and contains one line for each Perspective.
- Clicking the word Name in the column heading sorts the Perspectives alphabetically.
- The line for each Perspective record contains, from left to right, a group Actions checkbox, the Perspective Name, a description, and a line Actions menu (all described below).
 - » The group Actions checkbox is for selecting one or more records and applying a group Actions menu command, described below.
 - » Each Perspective name is a link that opens the Perspective record. Clicking a perspective name opens the record on the Edit Perspective page. See [Edit a Perspective](#) on page 7.
 - » The Perspective description describes the purpose and usage of the Perspective record.
 - » The line Actions menu provides access to functions related to Perspective records, such as edit or delete.
- The group Actions menu, above the list of records (on the left side), is for applying commands to one or more Perspectives selected by using the group Actions checkboxes.
- The **Print** and **Add New** commands, at the top right corner of the page, are for printing and adding new Perspectives.

Add a New Perspective

Purpose

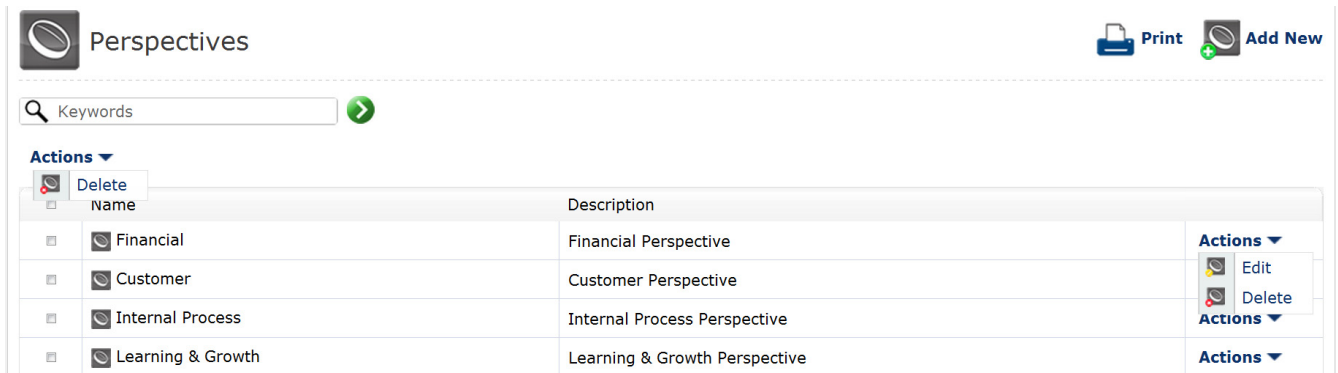
Use this procedure to add a new Perspective.

STEPS

1. From the Menu bar, select **Scorecard Builder / Perspectives**.

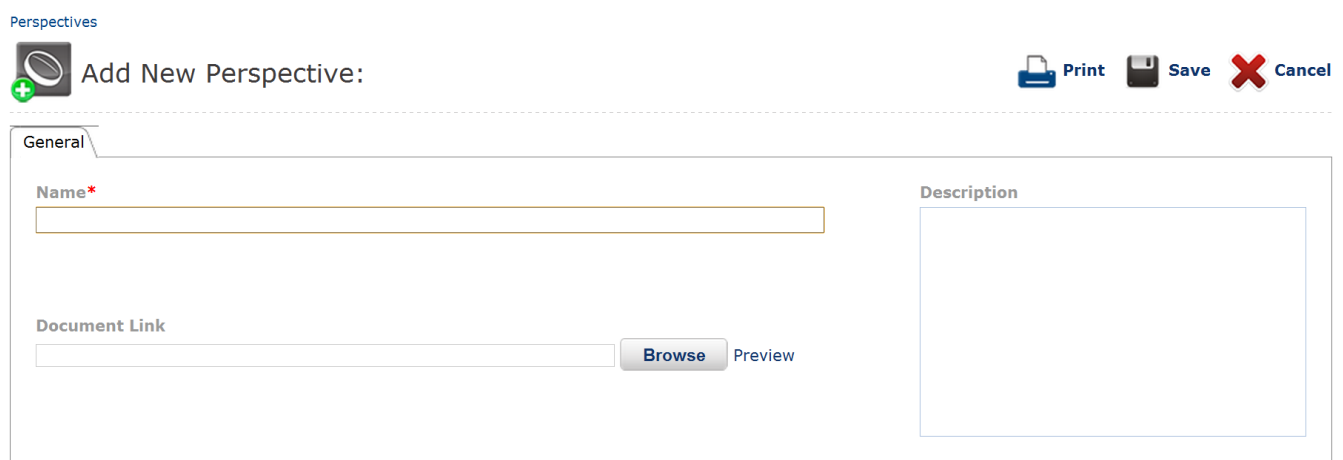
Perspectives Page

NOTE: For a detailed description of the Perspectives page, see [View the Perspectives List](#) on page 4.



2. On the Perspectives page, click **Add New**.

Add New Perspective, General Tabbed Page



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

Name*	Type up to 65 characters for the name of the Perspective (this name displays on the Scoreboard.)
Description	NOTE: Enter a description to describe the use and purpose of this Perspective.
Document Name	To link a document to this Perspective, click the Browse button and then select the document from the File Manager dialog box that appears. If a wiki is being used, a link to the wiki page that describes the Perspective and how it can be used can be pasted in here. This is typically left blank. NOTE: This document or wiki page is viewable by clicking on the Perspective name on the scoreboard.

4. Click **Save** to save and close the new Perspective record and to return to the Perspectives page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the Add Perspective page name) to not save your changes, close the Perspective record, and return to the Perspectives page.

Edit a Perspective

Purpose

After adding a Perspective record, you can change the Perspective settings. Use this procedure to change (edit) a Perspective record.

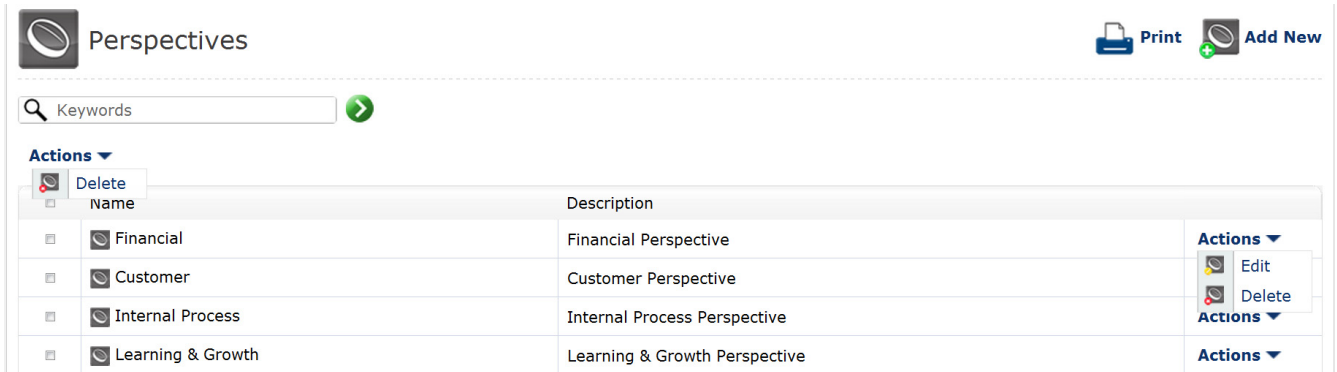
Alternative Ways to Access this Procedure

- Scorecard Builder --> Perspectives --> Perspective Line Actions --> Edit
- Scorecard Builder --> Perspectives --> Click on Perspective name --> Edit
- Main Menu --> Scoreboard Edit Mode --> Perspective Line Actions --> Edit

STEPS

1. From the Menu bar, select **Scorecard Builder / Perspectives**.

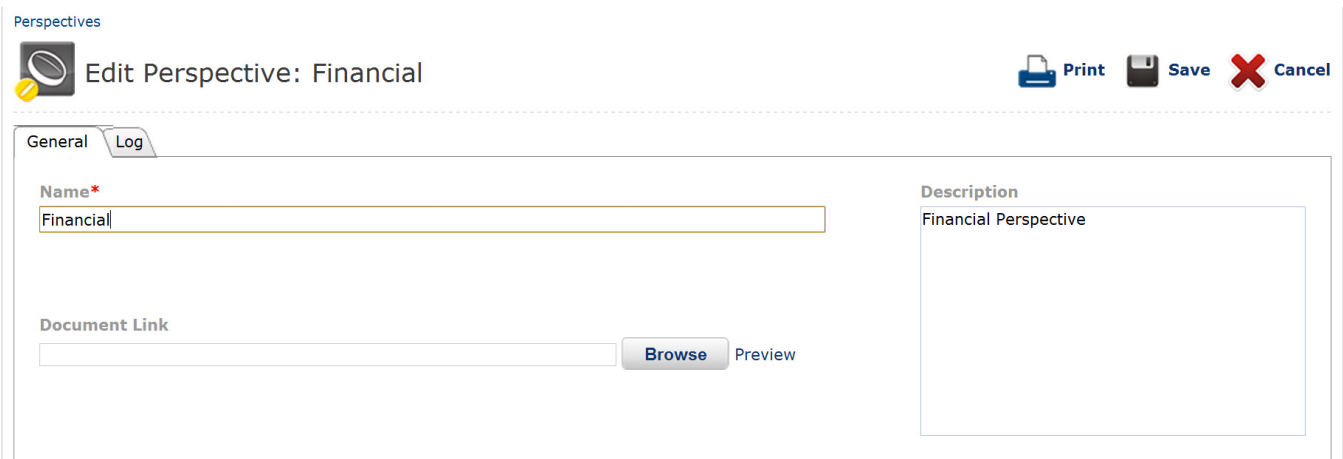
Perspectives Page



2. On the Perspectives page, locate and select (click) the name of the Perspective to edit. This opens the Perspective record on the Edit Perspective page.

NOTE: Optionally, locate the line for the Perspective to edit, click the line Actions down arrow, and select Edit from the line Actions menu.

Edit Perspective, General Tabbed Page



3. The General tabbed page displays by default. Do any of the following to edit the Perspective record:
 - Change the fields on the **General** tabbed page as necessary. For detailed field descriptions, see Add a New Perspective.
 - Click the **Log** tab to view a list of actions performed, user names, and dates for modifications that have been made to the Perspective.
4. When you are finished editing the Perspective record, click **Save** to save the changes, close the Perspective record, and return to the Perspectives page.

NOTE: *Optionally, click **Cancel** or the **back to list** link (above the Edit Perspective page name) to not save your changes, close the Perspective record, and return to the Perspectives page.*

Delete a Perspective

Purpose

Use this procedure to delete one or more Perspective records.

NOTES

- Deleting a Perspective that Objectives are linked to results in their removal from the scoreboard until they are linked to a different Perspective.

STEPS

- From the Menu bar, select **Scorecard Builder / Perspectives**.

Perspectives Page

Name	Description	Actions
Financial	Financial Perspective	Actions ▼ Edit Delete
Customer	Customer Perspective	Actions ▼ Edit Delete
Internal Process	Internal Process Perspective	Actions ▼ Edit Delete
Learning & Growth	Learning & Growth Perspective	Actions ▼ Edit Delete

- Do either of the following:
 - To delete one Perspective, locate the line for the Perspective record to delete, click the line **Actions down arrow**, and select **Delete** from the line Actions menu.
 - To delete one or more Perspectives, select the group Actions checkbox for each Perspective record to delete, click the group **Actions down arrow**, and select **Delete** from the group Actions menu.
- A message appears to confirm the Perspective deletion. Click **OK** to delete the Perspective(s) or click **Cancel** to not delete the Perspective(s)
- One or more other messages may appear. If so, for each message, click **OK** or **Cancel** as appropriate.

NOTES:

Chapter 3: Prefixes

Overview

Prefixes are words or acronyms that can be used as part of the name for Objectives, Measures and Initiatives in the InsightVision application. They are used to differentiate similar items from each other and create structure for names (rather than just relying on naming conventions in a single text field). Prefixes allow the same Names to be used in multiple instances—such as having an Objective for “Increase Employee Engagement” or a Measure of “Employee Engagement Score” in multiple departments.

By storing the Prefix separately from the Name, the InsightVision application allows for greater consistency and flexibility. For example, in most default configurations, the Prefix is displayed before the Objective or Measure Name, separated by a colon, but configuration settings can allow this to be turned on or off for different Scorecards.

Prefixes are generally created for each of the main Scorecards, but since any one Objective can appear on multiple scorecards, there is not an exact correlation between the Prefixes and the content on Scorecards. For example, there may be a corporate Objective with the Prefix of “CORP” for an Objective on the Corporate Strategy Map and Scorecard, such as “CORP: Streamline Access to Information”. That Objective may be re-used on the IT Department Scorecard, along with additional Departmental Objectives and Measures. In that case, the CORP prefix would identify that the one Corporate Objective was appearing on the Scorecard along with some additional departmental Objectives (with a Prefix such as “Dept-IT”).

Prefixes are often used to filter a long list of Objectives, and they are useful for copying Objectives and Measures. The InsightVision Copy Machine typically duplicates an Objective and the related Measure Information and gives all the new records a different Prefix (specified by the User during the Copy process).

If Prefix-based Security is turned on, then Prefixes can also limit access to content for Scorecard Builders. This is useful for restricting Scorecard Builders to certain content (e.g. for their particular department or geography).

This chapter includes the following sections for adding and maintaining Prefix records in the InsightVision application.

- [View the Prefixes List](#) on page 12
- [Add a New Prefix](#) on page 13
- [Edit a Prefix](#) on page 15
- [Delete a Prefix](#) on page 17

View the Prefixes List

Purpose

Use this procedure to view the Prefixes page.

STEPS

1. From the Menu bar, select **Scorecard Builder / Prefixes**.

Prefixes Page

<input type="checkbox"/>	Name	Description	
<input type="checkbox"/>	Corp		Actions ▾
<input type="checkbox"/>	J Mine		Actions ▾
<input type="checkbox"/>	Q Mine		Actions ▾
<input type="checkbox"/>	A-Mine	A-Mine	Actions ▾
<input type="checkbox"/>	B-Mine	B-Mine	Actions ▾

2. Notice the following about the Prefixes page:

- The Prefix list has a column heading line and contains one line for each Prefix.
- Clicking the word Name in the column heading sorts the Prefixes alphabetically.
- The line for each Prefix record contains, from left to right, a group Actions checkbox, the Prefix Name, a description, and a line Actions menu (all described below).
 - » The group Actions checkbox is for selecting one or more records and applying a group Actions menu command, described below.
 - » Each Prefix name is a link that opens the Prefix record. Clicking a Prefix name opens the record on the Edit Prefix page. See [Edit a Prefix](#) on page 15.
 - » The Prefix description describes the purpose and usage of the Prefix record.
 - » The line Actions menu provides access to functions related to Prefix records, such as edit or delete.
- The group Actions menu, above the list of records (on the left side), is for applying commands to one or more Prefixes selected by using the group Actions checkboxes.
- The **Print** and **Add New** commands, at the top right corner of the page, are for printing and adding new Prefixes.

Add a New Prefix

Purpose

Use this procedure to add a new Prefix.

STEPS

1. From the Menu bar, select **Scorecard Builder / Prefixes**.

Prefixes Page

NOTE: For a detailed description of the Prefixes page, see [View the Prefixes List](#) on page 12.

The screenshot shows the 'Prefixes' page. At the top left is a 'Prefixes' header with an information icon. To the right are 'Print' and 'Add New' buttons. Below the header is a search bar with a magnifying glass icon and a green arrow button. Underneath the search bar are 'Actions' and 'View By: All | Active | Inactive' options. The main content is a table with columns for 'Name', 'Description', and 'Actions'. The table contains five rows of prefix data.

<input type="checkbox"/>	Name	Description	Actions
<input type="checkbox"/>	Corp		Actions
<input type="checkbox"/>	J Mine		Actions
<input type="checkbox"/>	Q Mine		Actions
<input type="checkbox"/>	A-Mine	A-Mine	Actions
<input type="checkbox"/>	B-Mine	B-Mine	Actions

2. On the Prefixes page, click **Add New**.

Add New Prefix, General Tabbed Page

The screenshot shows the 'Add New Prefix' form. At the top left is a 'Back to List' link. To the right are 'Save' and 'Cancel' buttons. The form has a 'General' tab. It contains a 'Name *' text input field, a 'Description' text area, and a checked 'Active' checkbox.

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

Name*	Type up to 20 characters for the name of the Prefix.
Active	This check box indicates whether or not the Prefix is active. An inactive Prefix will not be selectable on scorecard elements. (A checked box indicates the Prefix is active.) Enter a description to describe the use and purpose of this Prefix.
Description	Enter a description to describe the use and purpose of this Prefix.

4. Click **Save** to save and close the new Prefix record and to return to the Prefixes page.

NOTE: *Optionally, click **Cancel** or the **back to list** link (above the Add Prefix page name) to not save your changes, close the Prefix record, and return to the Prefixes page.*

Edit a Prefix

Purpose

After adding a Prefix record, you can change the Prefix settings. Use this procedure to change (edit) a Prefix record.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Prefixes --> Prefix Line Actions --> Edit --> General Tab
- Scorecard Builder --> Prefixes --> Click on Prefix name --> Edit --> General Tab

STEPS

1. From the Menu bar, select **Scorecard Builder / Prefixes**.

Prefixes Page

<input type="checkbox"/>	Name	Description	Actions
<input type="checkbox"/>	Corp		Actions
<input type="checkbox"/>	J Mine		Actions
<input type="checkbox"/>	Q Mine		Actions
<input type="checkbox"/>	A-Mine	A-Mine	Actions
<input type="checkbox"/>	B-Mine	B-Mine	Actions

2. On the Prefixes page, locate and select (click) the name of the Prefix to edit. This opens the Prefix record on the Edit Prefix page.

NOTE: Optionally, locate the line for the Prefix to edit, click the line Actions down arrow, and select Edit from the line Actions menu.

Edit Prefix, General Tabbed Page

Back to List

Print Save Cancel

General Log

Name *
Carroll

Active

Description
Carroll County, MD

3. The General tabbed page displays by default. Do any of the following to edit the Prefix record:
 - Change the fields on the **General** tabbed page as necessary.
 - Click the **Log** tab to view a list of actions performed, user names, and dates for modifications that have been made to the Prefix.
4. When you are finished editing the Prefix record, click **Save** to save the changes, close the Prefix record, and return to the Prefixes page.

NOTE: *Optionally, click **Cancel** or the **back to list** link (above the Edit Prefix page name) to not save your changes, close the Prefix record, and return to the Prefixes page.*

Delete a Prefix

Purpose

Use this procedure to delete one or more Prefix records.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Prefixes --> Prefix Line Actions --> Delete
- Scorecard Builder --> Prefixes --> Prefix Group Actions --> Delete

STEPS

1. From the Menu bar, select **Scorecard Builder / Prefixes**.

Prefixes Page

<input type="checkbox"/>	Name	Description	Actions
<input type="checkbox"/>	Corp		Actions
<input type="checkbox"/>	J Mine		Actions
<input type="checkbox"/>	Q Mine		Actions
<input type="checkbox"/>	A-Mine	A-Mine	Actions
<input type="checkbox"/>	B-Mine	B-Mine	Actions

2. Do either of the following:
 - To delete one Prefix, locate the line for the Prefix record to delete, click the line **Actions down arrow**, and select **Delete** from the line Actions menu.
 - To delete one or more Prefixes, select the group Actions checkbox for each Prefix record to delete, click the group **Actions down arrow**, and select **Delete** from the group Actions menu.
3. A message appears to confirm the Prefix deletion. Click **OK** to delete the Prefix(es) or click **Cancel** to not delete the Prefix(es)
4. One or more other messages may appear. If so, for each message, click **OK** or **Cancel** as appropriate.

NOTES:

Chapter 4: Scorecards

Overview

Scorecards are the primary structure for organizing information (and granting security rights) in the InsightVision application. Scorecards are collections of Objectives (and all the associated measures and other information). Objectives can be associated with many different Scorecards.

User access is also controlled by Scorecard to limit what data users can view and interact with. If a user is granted rights to a Scorecard, that User has rights to view ALL the content on that Scorecard. If Prefix-based security is turned on, then Scorecard builders may only be able to Edit Objectives with Prefixes that they have rights to, even when they toggle to the Edit mode.

Scorecards are organized in hierarchies, based on Parent-Child Relationships. Since granting a User rights to any Scorecard automatically gives them rights to all the “descendants” of that branch in the hierarchy, it is generally NOT a good idea to nest all the cascaded scorecards under the top-level Scorecard. A common practice is to create different branches of the hierarchy that start with a Scorecard that has a name that starts with “CATEGORY” (e.g. CATEGORY: Departments) so that access to the various children Scorecards under that category can be granted to different individuals.

Scorecard Column Sets are also selected for each Scorecard. This makes it possible to display different sets of columns for different scorecards. For example, a Malcolm Baldrige scorecard may display different columns than the organization’s Balanced Scorecard, even though they are both in the same instance of InsightVision. Or, users who prefer to view lots of detail can have a different scorecard set as their default than users who like to see minimal detail. In this case, there could be two Scorecards with the same set of Objectives (and the same measures) but one displays 4 columns of information and another displays 8 columns of information. Users could select the format that they prefer as their Default Scorecard.

This chapter includes the following sections for adding and maintaining Scorecard records in the InsightVision application.

- [View the Scorecards List](#) on page 20
- [Add a New Scorecard](#) on page 22
- [Edit a Scorecard](#) on page 25
- [Maintain Objectives Assigned to a Scorecard](#) on page 27
- [Maintain Users Assigned to a Scorecard](#) on page 30
- [Delete a Scorecard](#) on page 33

View the Scorecards List

Purpose

Use this procedure to view the Scorecards page, which lists the Scorecard records the currently logged-in user can access.

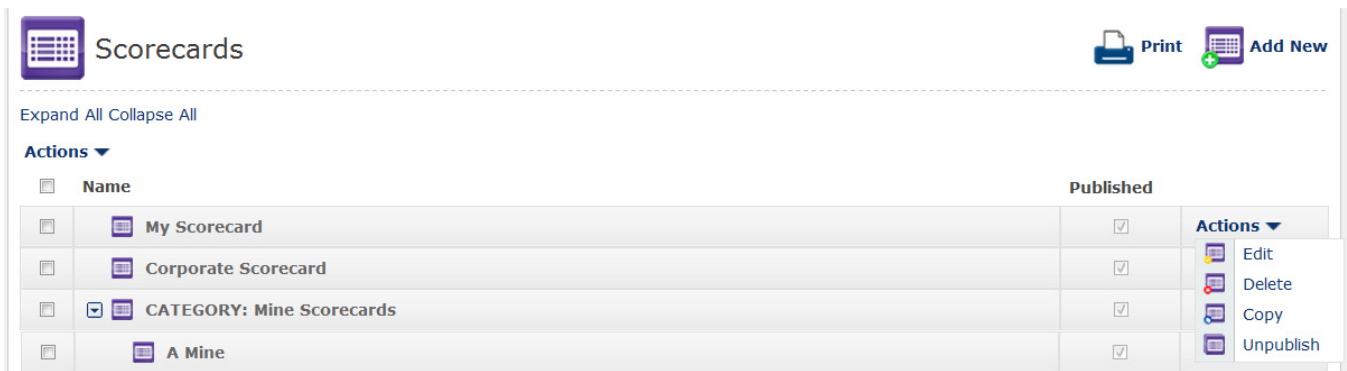
NOTES

- Users with the role of Administrator are automatically granted access to all Scorecards when they are created. If a new Administrator is added after scorecards have already been created, the Administrator will need to be given access rights to the previously-created Scorecards.

STEPS

1. From the Menu bar, select **Scorecard Builder / Scorecards**.

Scorecards Page



2. Notice the following about the Scorecards page:

- The Scorecard list has a column heading line and contains one line for each Scorecard record. The list is empty if no Scorecards are assigned to the currently logged-in user.
- The Scorecard list generally contains one or more categories (hierarchies) of Scorecards (in the Name column) as follows:
 - » Each category (hierarchy) has a top-level (hierarchy) Scorecard and one or more sub-level of Scorecards (on indented lines below the top-level Scorecard).
 - » The top-level Scorecard is always a parent Scorecard.
 - » The sub-level Scorecards have parent/child relationships (as a nested hierarchy).
 - » A sub-level Scorecard is either a child or both a child and a parent. That is, a sub-level Scorecard is always a child to the Scorecard on the level directly above it, and is a parent to any Scorecards on the level directly below it (if there are any).
- By clicking and dragging a Scorecard you can rearrange the order in which they display. This drag and drop sorting will affect the Scorecards drop-down on the Scoreboard and wherever a list of Scorecards displays.

- The line for each Scorecard record contains, from left to right, an Expand/Collapse icon (parent Scorecards only), a group Actions checkbox, a Scorecard icon, the Scorecard Name, a Published status checkbox, and a line Actions menu (all described below).
 - » The Expand/Collapse icon appears on lines for parent Scorecards (Scorecards that have sub-levels below them). Clicking an **Expand** (▸) icon shows the sub-level (child) Scorecards for the parent Scorecard; clicking a **Collapse** (▾) icon hides the sub-level (child) Scorecards for the parent Scorecard.
 - » The group Actions checkbox is for selecting one or more records and applying a group Actions menu command, described below.
 - » The Scorecard icon indicates the status of the Scorecard: colored is published; grey is not published.
 - » Each Scorecard name is a link that opens the Scorecard record. Clicking a Scorecard name opens the record on the Edit Scorecard page. See [Edit a Scorecard](#) on page 25.
 - » The Published checkbox, which is view-only, indicates the status of the Scorecard. A checkmark in the checkbox indicates the Scorecard is published and can be viewed (by assigned users) on the Scoreboard. An empty checkbox indicates the Scorecard is not published and cannot be viewed on the Scoreboard.
 - » The line Actions menu provides access to functions related to Scorecard records, such as edit, copy, and add.
- The group Actions menu, above the list of records (on the left side), is for applying commands to one or more Scorecards selected by using the group Actions checkboxes.
- The **Print** and **Add New** commands, at the top right corner of the page, are for printing and adding new Scorecards.

Add a New Scorecard

Purpose

Use this procedure to add a new parent or child Scorecard record.

NOTES

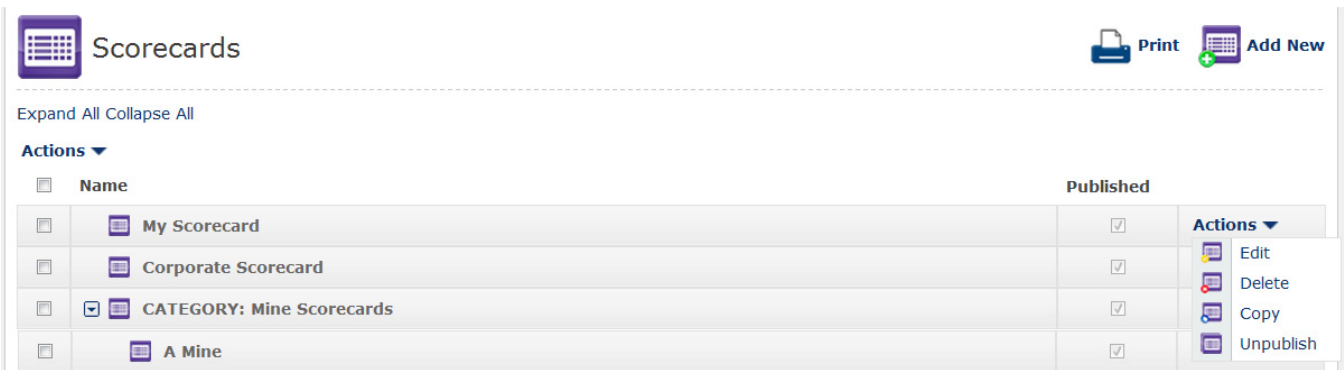
- Before adding Scorecards, establish a naming policy that uses consistent names, capitalization, and punctuation.

STEPS

1. From the Menu bar, select **Scorecard Builder / Scorecards**.

Scorecards Page

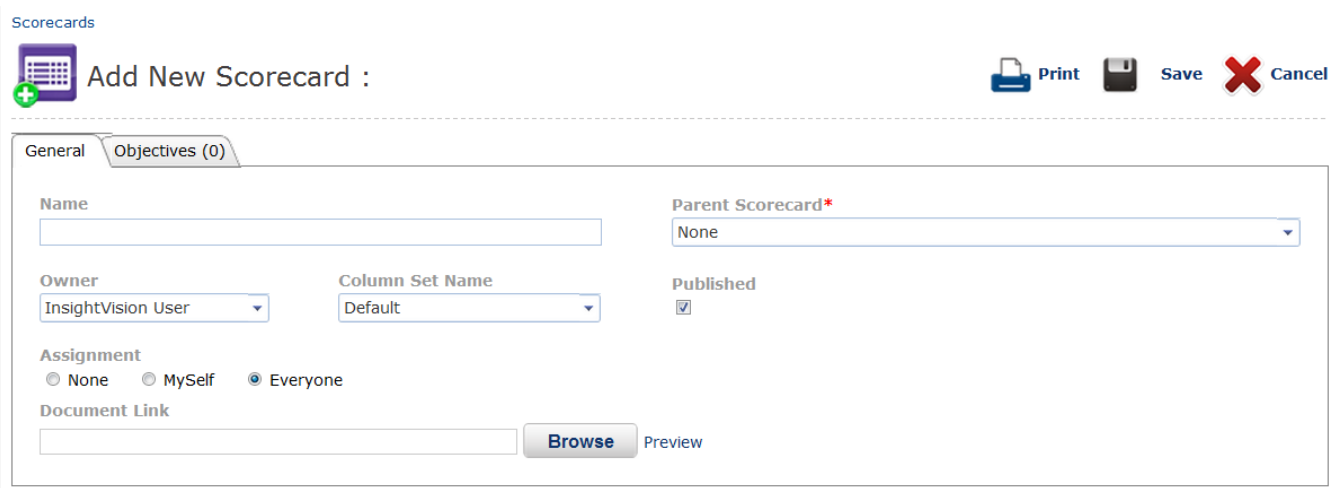
NOTE: For a detailed description of the Scorecards page, see [View the Scorecards List on page 20](#).



2. On the Scorecards page, click **Add New**.

NOTE: Optionally, to add a new child Scorecard to an existing Scorecard on the Scorecards page, click the Actions menu down arrow for the existing Scorecard and select **Add Child Scorecard** from the Actions menu.

Add New Scorecard, General Tabbed Page



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

Name*	Type up to 80 characters for the name of the Scorecard.
Parent Scorecard	<ul style="list-style-type: none"> If this is a top-level (hierarchy) Scorecard, select None. If this is a sub-level (child) Scorecard, select the name of the parent Scorecard.
Owner	<p>Select the name of the owner for this Scorecard.</p> <p>NOTE: The owner is the person responsible for monitoring the Scorecard.</p> <p>NOTE: Ownership is not the same as Assignment. To allow an owner to view the Scorecard on the Scoreboard and the Scorecard list page, you must also assign the user to the Scorecard. See the Assignment field details.</p>
Column Set Name	Select the column set that you would like to display for this scorecard when being viewed on the Scoreboard. Column sets determine which columns of information will be displayed for this Scorecard on the Scoreboard page. To configure additional column sets, contact your InsightVision Administrator.
Published	<ul style="list-style-type: none"> To show this Scorecard on the Scoreboard for assigned users, leave the checkmark in the checkbox. To not show this Scorecard on the Scoreboard for assigned users, remove the checkmark from the checkbox. <p>NOTE: All Scorecards (published or not published) appear on the Scorecard list page for assigned users. See the Assignment field details.</p>
Assignment	<p>This field lets you initially assign users to the Scorecard. Assignment allows a user to view the Scorecard on the Scoreboard (if the Scorecard is published). If the user is a Scorecard Builder, assignment also means the Scorecard appears on the Scorecard list page for the user and the user can edit the Scorecard. All Administrators are automatically assigned to new Scorecards and their access cannot be removed.</p> <p>IMPORTANT: Be careful when assigning users to a Scorecard. If you assign a user to a parent Scorecard, it allows him/her to access all Scorecards that are sub-levels of the Scorecard.</p> <ul style="list-style-type: none"> To assign only Administrators to this Scorecard, select None. <p>NOTE: To edit a Scorecard with the assignment set at None, contact an Administrator.</p> <ul style="list-style-type: none"> To assign only Administrators and you (the currently logged-in user) to this Scorecard, select Myself. To assign all users to this Scorecard, select Everyone. <p>NOTE: This field appears on the Add New Scorecard page only and does not appear when you edit a Scorecard. To edit assignments after adding and saving a new Scorecard, use the Assignment tabbed page (or contact an Administrator). For details, see Maintain Users Assigned to a Scorecard on page 30.</p>

Document Name

To link a document to this Scorecard, click the **Browse** button and then select the document from the File Manager dialog box that appears. If a wiki is being used, a link to a wiki page for this scorecard can be pasted in here.

A document or wiki page can be useful to describe the planned content for future scorecards that are listed but do not yet have content.

NOTE: The document link appears on the Scoreboard by clicking on the Scorecard name.

4. Optionally, to link any Objective records to the Scorecard, click the Objectives tab. For specific steps, see [Maintain Objectives Assigned to a Scorecard](#) on page 27. Until Objectives have been linked to a Scorecard, the scorecard has nothing to display when selected on the Scoreboard page.
5. Click **Save** to save and close the new Scorecard record and to return to the Scorecards page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the Add Scorecard page name) to not save your changes, close the Scorecard record, and return to the Scorecards page.

Edit a Scorecard

Purpose

Use this procedure to change (edit) a Scorecard record once it has been created.

NOTES

- Only users assigned to a Scorecard can edit the Scorecard. For more information, see [Maintain Users Assigned to a Scorecard](#) on page 30.

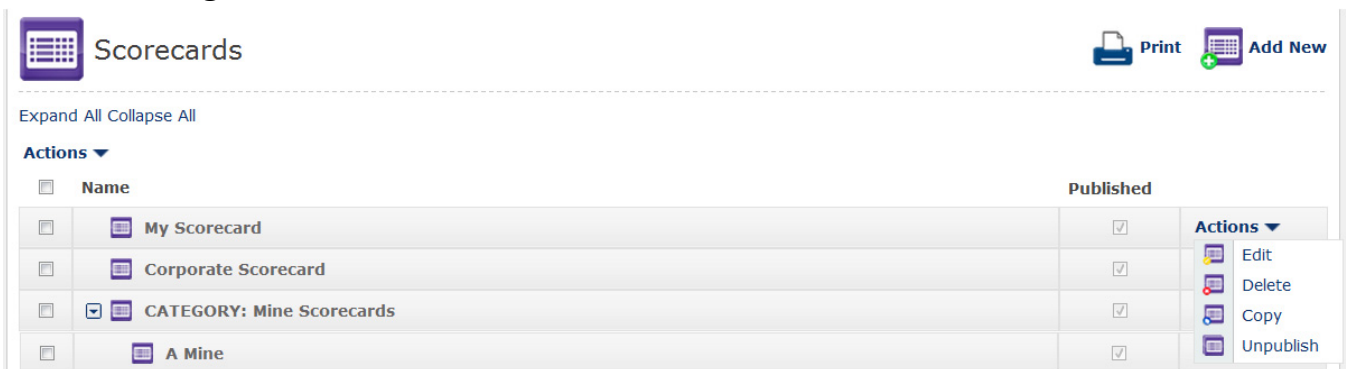
Alternative Ways to Access this Procedure

- Scorecard Builder --> Scorecards --> Scorecard Line Actions --> Edit --> General Tab
- Scorecard Builder --> Scorecards --> Click on Scorecard name --> General Tab

STEPS

1. From the Menu bar, select **Scorecard Builder / Scorecards**.

Scorecards Page



2. On the Scorecards page, locate and select (click) the name of the Scorecard to edit. This opens the Scorecard record on the Edit Scorecard page.

NOTE: Optionally, locate the line for the Scorecard to edit, click the line Actions down arrow, and select Edit from the line Actions menu.

Edit Scorecard, General Tabbed Page

Scorecards



Edit Scorecard : Corporate Scorecard

Print Save Cancel

General Objectives (14) Assignment Log

Name	Corporate Scorecard	Parent Scorecard*	None
Owner	MINING Administrator	Column Set Name	Default
Document Link	http://Demo	Published	<input checked="" type="checkbox"/>

Preview

- The General tabbed page displays by default. Do any of the following to edit the Scorecard record:
 - Change the fields on the **General** tabbed page as necessary. For detailed field descriptions, see Add a New Scorecard.
 - Click the **Objectives** tab to maintain population Objectives assigned to the Scorecard record.
 - Click the **Assignment** tab to maintain users assigned to the Scorecard record. For detailed steps, see Maintain Users Assigned to a Scorecard.
 - Click the **Log** tab to view a list of actions performed, user names, and dates for modifications that have been made to the Scorecard.
- When you are finished editing the Scorecard record, click **Save** to save the changes, close the Scorecard record, and return to the Scorecards page.

NOTE: Optionally, click **Cancel** or the **back to list link** (above the Edit Scorecard page name) to not save your changes, close the Scorecard record, and return to the Scorecards page.

Maintain Objectives Assigned to a Scorecard

Purpose

Use this procedure to add or remove the assignment of Objectives for a Scorecard.

NOTES

- Objectives must be added before they can be assigned to a Scorecard.
- Only users assigned to a Scorecard can maintain the Scorecard. For more information, see [Maintain Users Assigned to a Scorecard](#) on page 30.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Scorecards --> Add New Button --> Objectives
- Scorecard Builder --> Scorecards --> Scorecard Line Actions --> Edit --> Objectives Tab
- Main Menu --> Scoreboard --> Edit Mode --> Perspective Line Actions --> Add Objective
- Scorecard Builder --> Objectives --> Objectives Line Actions Menu --> Assign to Scorecard
- Scorecard Builder --> Objectives --> Objectives Group Actions Menu --> Assign to Scorecard

STEPS

1. From the Menu bar, select **Scorecard Builder / Scorecards**.

Scorecards Page

<input type="checkbox"/>	Name	Published	Actions
<input type="checkbox"/>	My Scorecard	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> Edit Delete Copy Unpublish
<input type="checkbox"/>	Corporate Scorecard	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	CATEGORY: Mine Scorecards	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	A Mine	<input checked="" type="checkbox"/>	

2. On the Scorecards page, locate and select (click) the **Name** of the Scorecard to maintain. This opens the Scorecard record on the Edit Scorecard page with the General tabbed page displayed.

NOTE: Optionally, locate the line for the Scorecard to maintain, click the line Actions down arrow, and select Edit from the line Actions menu.

3. On the Edit Scorecard, General tabbed page (not shown), click the **Objectives** tab.

Edit Scorecard, Objectives Tabbed Page

Scorecards

Edit Scorecard : Corporate Scorecard

Print Save Cancel

General Objectives (14) Assignment Log

Objectives

Actions Select Objective(s)

	Prefix	Name	Description	
<input type="checkbox"/>	Corp	Increase Earnings -- Profitable Growth	In order to maintain our access to capital for growth and to maintain or grow our stock price to enable growth by acquisition, we must increase our earnings.	Actions
<input type="checkbox"/>	Corp	Maintain High Margins		Actions

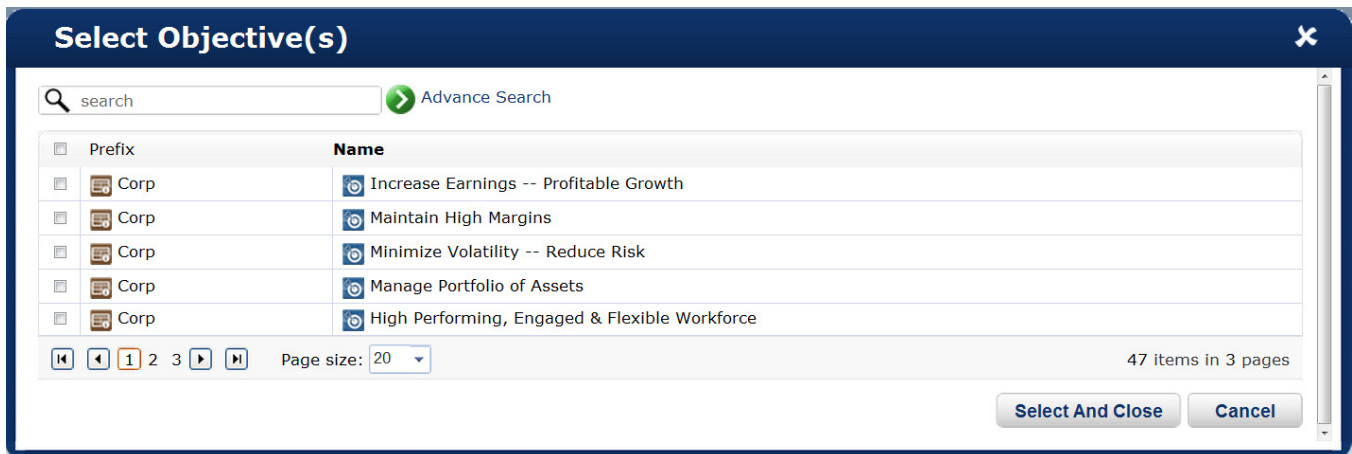
4. Notice the following about the Objectives tabbed page.

- The tab (shown circled above) shows the number of Objective records currently assigned to the Scorecard.
- The list has a column heading line and one line for each Objective record. If no records are assigned in a section, a *No records to display* message appears on the first line.
- Clicking any of the titles in the column heading sorts the list by that column, numerically then alphabetically.
- The line for each Objective record contains, from left to right, a group Actions checkbox, the Prefix, the Name, the Description, and a line Actions menu (appears only if the list shows records).
 - » The group Actions checkbox is for selecting one or more records and applying a group Actions menu command.
 - » The Prefix is the prefix for the record.
 - » The Description is the description entered for the record.
 - » The line Actions menu provides access to functions related to Objective records, such as edit, delete.

IMPORTANT: If you select **Edit Objective** from a line Actions menu, you will switch from the current screen to the **Edit Objective Screen** and changes to the **Scorecard** are not saved.

- Each section has a group Actions menu above the list on the left side (appears only if the list shows records). This menu provides access to a command for removing the assignment of records selected (using the group Actions checkboxes).
 - Each section has a Select button (above the list on the right side). These buttons are for adding Objective assignments to the Scorecard.
5. To add Objective assignments to the Scorecard, click the **Select** button. This opens the Select Objectives dialog box.

Select Objectives Dialog Box



- In the Select Objectives dialog box, select the checkbox(es) for the Objective record(s) to assign to the Scorecard.
 - Click the **Select and Close** button.
6. Optionally, to remove an Objective assignment from the Scorecard, do either of the following:
- Locate the line for the Objective to remove, click the line **Actions down arrow**, and select **Remove** from the line Actions menu.
 - Select the group Actions checkbox for each Objective record to remove, click the group **Actions down arrow**, and select **Remove** from the group Actions menu.
7. When you are finished maintaining the Scorecard record, click **Save** to save the changes, close the Scorecard record, and return to the Scorecards page.

NOTE: Optionally, click **Cancel** or the **back to list link** (above the Edit Scorecard page name) to not save your changes, close the Scorecard record, and return to the Scorecards page.

Maintain Users Assigned to a Scorecard

Purpose

When a new Scorecard is added in the application, selected users are assigned to the Scorecard. This allows the selected users to view the Scorecard on the Scoreboard (if the Scorecard is published). If a user is a Scorecard Builder, this also means the Scorecard appears on the Scorecard list page for the user and the user can edit the Scorecard. Use this procedure to add or remove the user assignments for a Scorecard.

IMPORTANT: Be careful when assigning users to a Scorecard. If you assign a user to a parent Scorecard, it allows him/her to access all Scorecards that are sub-levels of that Scorecard.

NOTES

- Only users already assigned to a Scorecard can maintain the Scorecard.
- Administrators are automatically assigned to all Scorecards.
- To maintain the users assignments for a Scorecard with the assignment initially set to None, contact an Administrator to gain access.

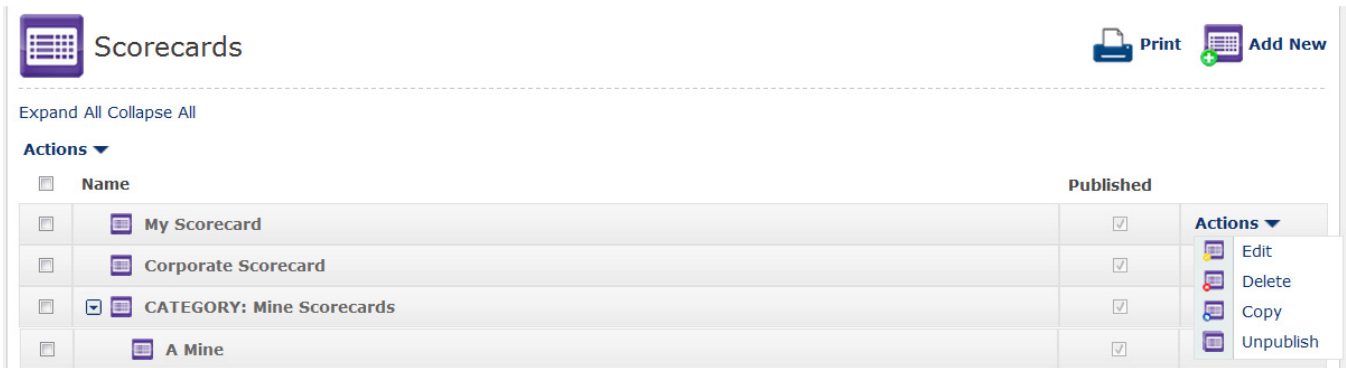
Alternative Ways to Access this Procedure

- Scorecard Builder --> Scorecards --> Scorecard Line Actions --> Edit --> Assignment Tab
- Scorecard Builder --> Scorecards --> Click on Scorecard name --> Assignment Tab
- Scorecard Builder --> Scorecards --> Add New Button --> General Tab

STEPS

1. From the Menu bar, select **Scorecard Builder / Scorecards**.

Scorecards Page

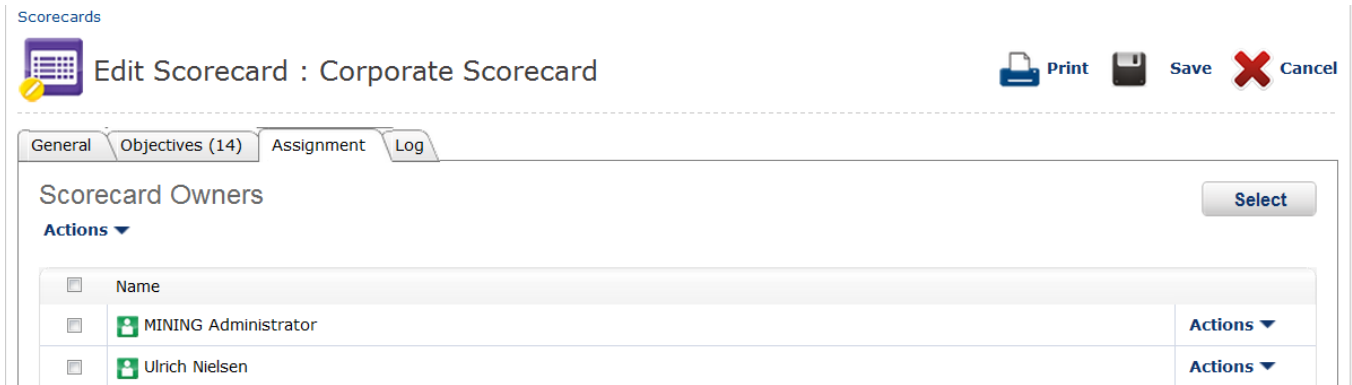


2. On the Scorecards page, locate and select (click) the **Name** of the Scorecard to maintain. This opens the Scorecard record on the Edit Scorecard page with the General tabbed page displayed.

NOTE: Optionally, locate the line for the Scorecard to edit, click the line Actions down arrow, and select Edit from the line Actions menu.

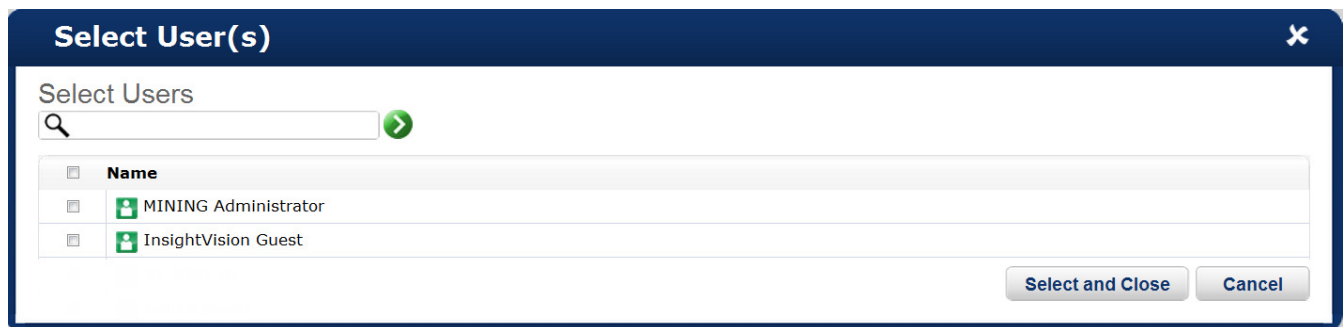
3. On the Edit Scorecard, General tabbed page (not shown), click the **Assignment** tab.

Edit Scorecard, Assignment Tabbed Page



4. Notice the following about the Assignment tabbed page:
 - The page contains a list of user records (not owners) assigned to the Scorecard.
 - The user list has a column heading line and one line for each user record.
 - Clicking the word Name in the column heading sorts the user list alphabetically by the first name of the user.
 - The line for each user record contains, from left to right, a group Actions checkbox, the user Name, and a line Actions menu (all described below).
 - » The group Actions checkbox is for selecting one or more user records and applying a group Actions menu command.
 - » The user Name is the first and last name of the user.
 - » The line Actions menu provides access to a command for removing the user assignment from the Scorecard.
 - The group Actions menu, above the list of records (on the left side), provides access to a command for removing the user assignment of one or more user records selected by using the group Actions checkboxes.
5. To add user assignments to the Scorecard, click the **Select** button. This opens the Select Users dialog box.

Select Users Dialog Box



- a. In the Select Users dialog box, select the checkbox(es) for the user record(s) to assign to the Scorecard.
- b. Click the **Select and Close** button.
6. To remove user assignments from the Scorecard, do either of the following:
 - To remove one user, locate the line for the user record to remove, click the line **Actions down arrow**, and select **Remove Assignment** from the line Actions menu.

- To remove one or more users, select the group Actions checkbox for each user record to remove, click the group **Actions down arrow**, and select **Remove Assignment** from the group Actions menu.

NOTE: Do not remove your own user assignment. To do this, contact another user assigned to the Scorecard.

7. On the Assignment tabbed page, notice the users selected for removal no longer appear in the user list.
8. When you are finished maintaining the Scorecard record, click **Save** to save the changes, close the Scorecard record, and return to the Scorecards page.

NOTE: Optionally, click **Cancel** or the **back to list link** (above the Edit Scorecard page name) to not save your changes, close the Scorecard record, and return to the Scorecards page.

Delete a Scorecard

Purpose

Use this procedure to delete one or more Scorecard records.

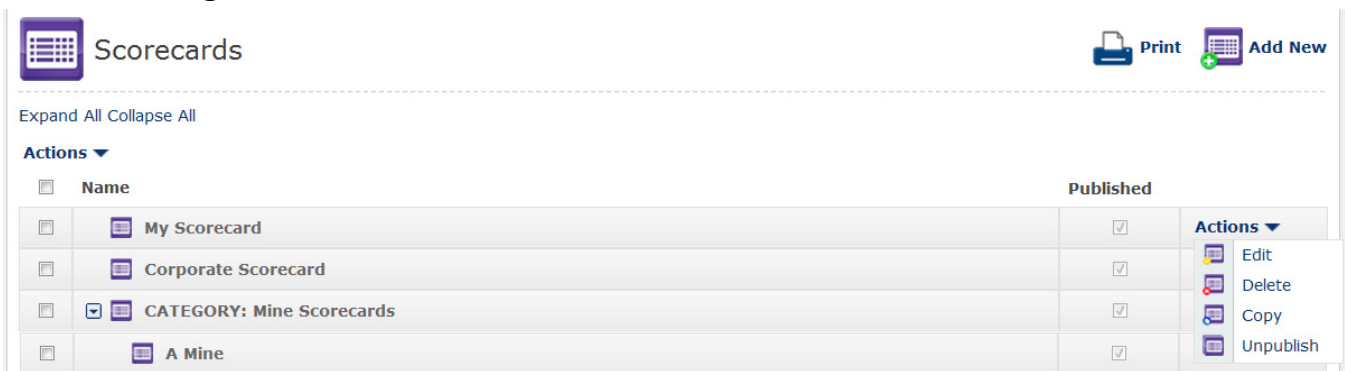
NOTES

- To delete a Scorecard record, a user must be an Administrator or be both assigned to the Scorecard and the owner of the Scorecard. See [Add a New Scorecard](#) on page 22 and [Edit a Scorecard](#) on page 25.
- To delete a parent Scorecard record, a user must first delete or reassign all sub-level Scorecards. Begin with the lowest sub-level and delete/reassign one level at a time.

STEPS

1. From the Menu bar, select **Scorecard Builder / Scorecards**.

Scorecards Page



2. Do either of the following:
 - To delete one Scorecard, locate the line for the Scorecard record to delete, click the line **Actions down arrow**, and select **Delete** from the line Actions menu.
 - To delete one or more Scorecards, select the group Actions checkbox for each Scorecard record to delete, click the group **Actions down arrow**, and select **Delete** from the group Actions menu.
3. A message appears to confirm the Scorecard deletion. Click **OK** to delete the Scorecard(s) or click **Cancel** to not delete the Scorecard(s)
4. One or more other messages may appear. If so, for each message, click **OK** or **Cancel** as appropriate.
NOTE: If you are not the owner of a Scorecard, the Scorecard does not delete and still appears in the list.

NOTES:

Chapter 5: Objectives

Overview

Objectives are the primary building blocks in InsightVision. All Measures (and indirectly, Initiatives) must be associated with Objectives to be assigned to Scorecards and viewed. Objectives can be assigned to multiple Scorecards and to multiple Theme Filters. Objectives belong to only one Perspective. Objectives can be associated with other Objectives to allow drill-down (also called “zooming in”) to additional detail.

In the Balanced Scorecard (BSC) Methodology, Objectives (also called “Strategic Objectives”) typically begin with a verb to indicate action or change. The Objectives should be specific enough to communicate choices and clarify the strategic intent to improve organization alignment. Objectives should not—with rare exceptions—be projects that can be completed in a relatively short time. Instead, they should be the aspirational change that the selected projects should help accomplish. Over time, the progress of the Objective should be tracked by one or more Measures and impacted by Initiatives (also called projects).

Objectives should ideally have a relatively short name, a more complete description and a series of points that describe the “From-To Gap” (clarifying the change between the current state and the desired state).

The InsightVision software allows flexibility to use Objectives in other ways besides the best practices of the BSC methodology. For example, an Objective can be a sub-category in the Baldrige Framework (e.g. 2.1 Strategy Development) or just a heading for a group of measures.

Objectives appear on the Scoreboard view, Strategy Maps and on the Objectiveboard (a View that shows Objectives and Measures that are related to another Objective).

Objectives can also be used in creative ways to describe risks that can be associated with Objectives, measures, and managed with risk mitigation projects.

This chapter includes the following sections for adding and maintaining Objective records in the InsightVision application.

- [View the Objectives List](#) on page 36
- [Add a New Objective](#) on page 37
- [Edit an Objective](#) on page 41
- [Maintain Measures that Monitor an Objective](#) on page 43
- [Maintain Related Objectives](#) on page 46
- [Delete an Objective](#) on page 48

View the Objectives List

Purpose

Use this procedure to view the Objectives page, which lists the Objectives records in the InsightVision application.

STEPS

1. From the Menu bar, select **Scorecard Builder / Objectives**.

Objectives Page

<input type="checkbox"/>	Prefix Name	Name	Description	Actions
<input type="checkbox"/>	Corp	Increase Earnings -- Profitable Growth	In order to maintain our acces...	Actions
<input type="checkbox"/>	Corp	Maintain High Margins		Edit
<input type="checkbox"/>	Corp	Minimize Volatility -- Reduce Risk	We must try to minimize the vo...	Delete
<input type="checkbox"/>	Corp	Manage Portfolio of Assets		Copy
<input type="checkbox"/>	Corp	Offer Global Presence & Local Service	If we want our customers to se...	Assign To Scorecard
				Objective View

2. Notice the following about the Objectives page:

- The Objective list has a column heading line and contains one line for each Objective record. The list is empty if no Objectives have been added.
- Clicking the word Name in the column heading sorts the records alphabetically.
- The line for each Objective record contains, from left to right, a group Actions checkbox, the prefix name, the Objective Name, Description, and a line Actions menu (all described below).
 - » The group Actions checkbox is for selecting one or more records and applying a group Actions menu command, described below.
 - » Each Objective name is a link that opens the Objective record. Clicking an Objective name opens the record on the Edit Objective page. See [Edit an Objective](#) on page 41.
 - » The Description column gives a brief overview of the purpose of the Objective.
 - » The line Actions menu provides access to functions related to Objective records, such as edit, copy, and view.
 - » The group Actions menu, above the list of records (on the left side), is for applying commands to one or more Objectives selected by using the group Actions checkboxes.
- The **Print** and **Add New** commands, at the top right corner of the page, are for printing and adding new Objectives.

Add a New Objective

Purpose

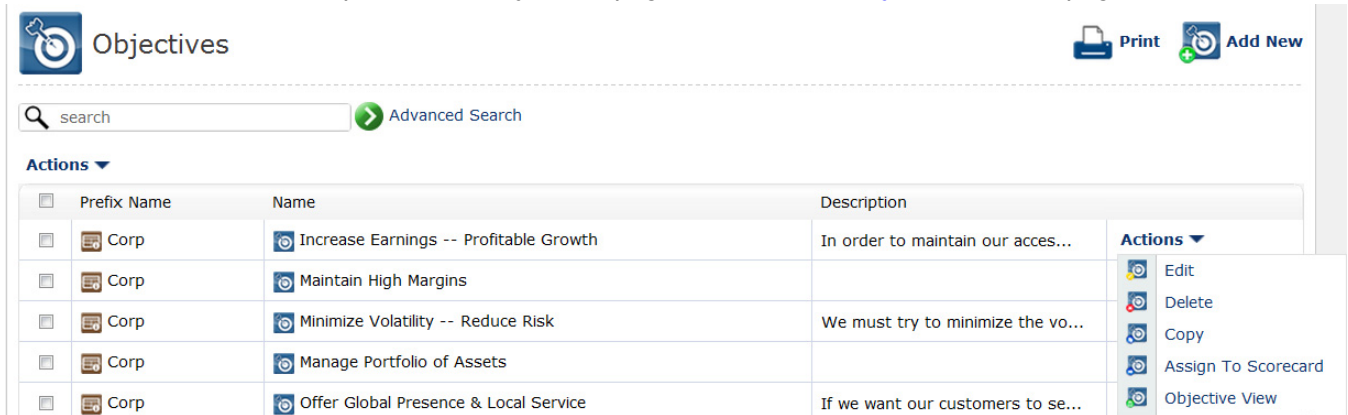
Use this procedure to add a new Objective record.

STEPS

1. From the Menu bar, select **Scorecard Builder / Objectives**.

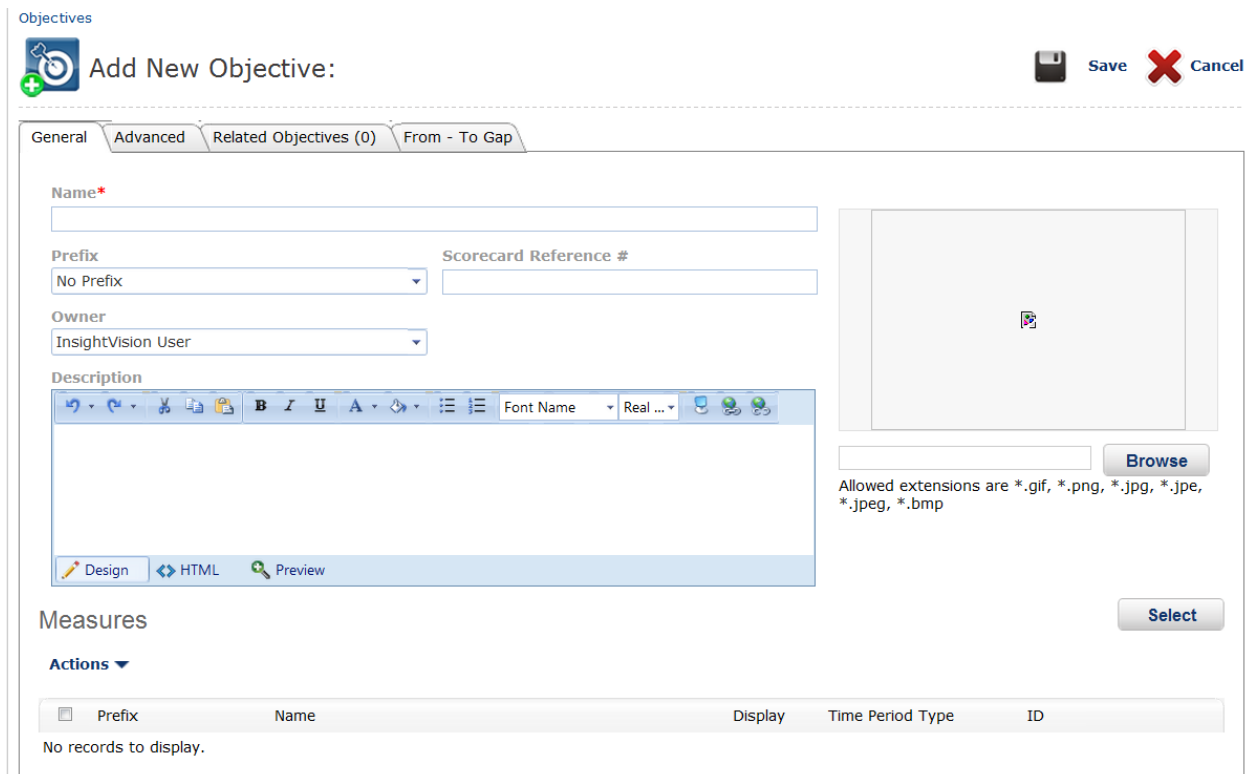
Objectives Page

NOTE: For a detailed description of the Objectives page, see [View the Objectives List on page 36](#)



2. On the Objectives page, click **Add New**.

Add New Objective, General Tabbed Page



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

Name*	Type up to 65 characters for the name of the Objective.
Prefix	Select the prefix to use for this Objective. Note: If a User is going to be adding many Objectives with the same Prefix, the Administrator can edit that User record and select a default Prefix to automatically appear in this field when New Objectives are added.
Image	To link an image to this Objective, click the Browse button and then select the image file Image Manager dialog box that appears.
Scorecard Reference #	The Scorecard Reference # is an optional part of a name for the Objective. It can be configured to display on the scoreboard page (or other pages) after the prefix and before the Objective name. This is often left blank, but some organizations use a convention such as C1, C2 to refer to the first and second Objectives in the Customer Perspective and P4 or P5 to refer to the fourth and fifth Objectives in the Internal Process Perspective.
Description	The Description text field is a description of the Objective and its purpose. This field displays on the Objective presentation view. If a wiki is being used, it is a good practice to link to the wiki on the Description page. Objective owners (or "Performance Advocates" are often listed in the Description text.

4. Optionally, to assign Measures to the Objective record, use the Measures section at the bottom of the page. Otherwise, skip this step. For specific steps, see [Maintain Measures that Monitor an Objective](#) on page 43.

5. Click the **Advanced** tab.

Add New Objective, Advanced Tabbed Page

The screenshot shows the 'Edit Objective: Respect the Environment' page. At the top, there are icons for Print, Save, and Cancel. Below the title, there are tabs for 'General', 'Advanced', 'Related Objectives (2)', 'From - To Gap', and 'Log'. The 'Advanced' tab is selected. The form contains the following fields:

- Perspective:** A dropdown menu with 'Customer' selected.
- Short Name:** A text input field containing 'Respect the Environment'.
- Document Link:** A text input field with a 'Browse' button and a 'Preview' label next to it.

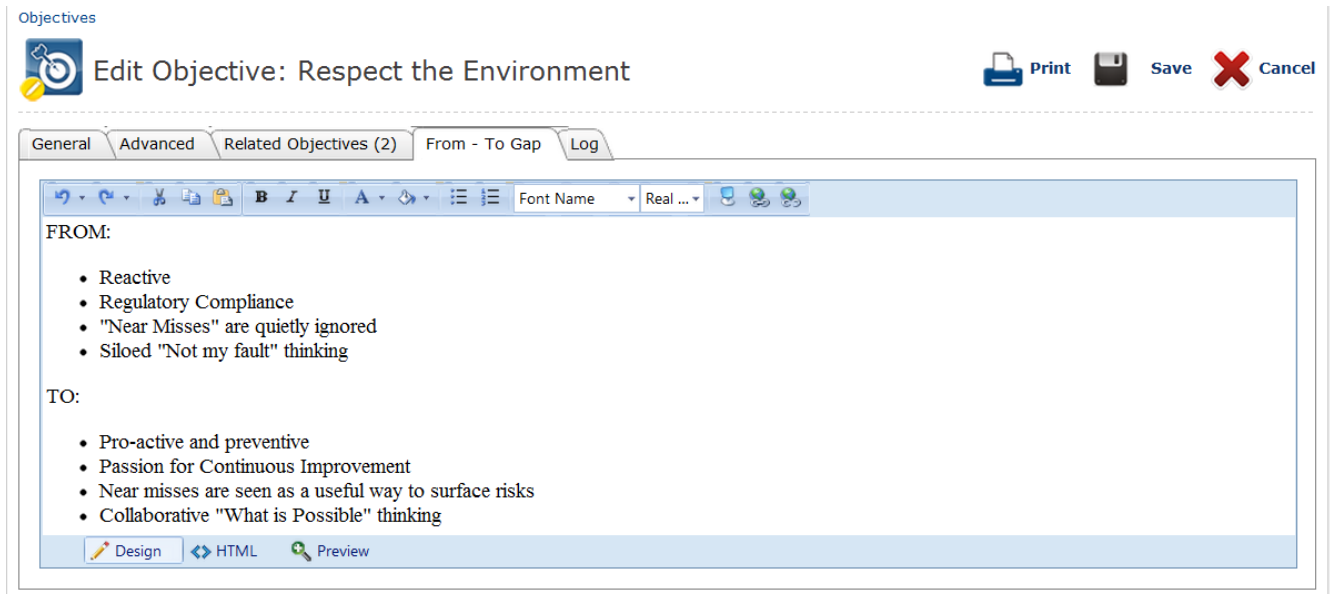
6. Complete the following fields on the Advanced tabbed page:

Perspective	<p>Accept the default, Financial, or select the correct Perspective for this Objective. If the Objective was added from the Scoreboard Edit Mode, the correct Perspective will automatically be populated</p> <p>The Perspective determines which section the Objective will display in on the scoreboard.</p>
Short Name	<p>This field is typically left empty. If a short name is entered in this field, it will used when creating Strategy Maps to make them less cluttered. If this is left blank, the Strategy Map will use the Objective Name instead. The Short Name for an Objective can be up to 45 characters.</p>
Document Link	<p>This field is usually left blank. To link a document to this Objective, click the Browse button and then select the document from the File Manager dialog box that appears.</p> <p>NOTE: When using a wiki, the recommended practice is to create a link to the wiki page for this Objective on the Objective Description page instead of adding it here. If this field is populated, clicking on the Objective name in the Scoreboard view will bring up the document or wiki page instead of the Objective Presentation View. (Clicking the Objective icon will still bring up the Objective Presentation View.)</p>

7. Optionally, to assign Objectives that this Objective impacts use the Related Objectives tabbed page. Otherwise, skip this step. For specific steps, see [Maintain Related Objectives](#) on page 46

8. Click the **From - To Gap** tab.

Add New Objective, From - To Gap Tabbed Page



9. Complete the following fields on the How We Impact tabbed page:

From - To Gap	The From - To Gap text field is a description of where the status of this Objective is today and where the leadership team wants it to go. This text field is helpful in conversations about what needs to be done to close the From - To Gap. Clarifying the From-To Gap makes it easier to select appropriate measures and Initiatives. The contents of the From-To Gap are displayed on a Tab in the Objective Presentation View and can be edited by Scorecard Builders directly in that View
----------------------	---

10. Click **Save** to save and close the new Objective record and to return to the Objectives page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the Add Objective page name) to not save your changes, close the Objective record, and return to the Objectives page.

Edit an Objective

Purpose

After adding an Objective record, you can change the Objective properties. Use this procedure to change (edit) an Objective record.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Objectives --> Objective Line Actions --> Edit
- Scorecard Builder --> Objectives --> Click on Objective Name
- Main Menu --> Scoreboard --> Edit Mode --> Objective Line Actions --> Edit Objective

STEPS

1. From the Menu bar, select **Scorecard Builder / Objectives**.

Objectives Page

Prefix Name	Name	Description	Actions
Corp	Increase Earnings -- Profitable Growth	In order to maintain our acces...	Actions Edit Delete Copy Assign To Scorecard Objective View
Corp	Maintain High Margins		
Corp	Minimize Volatility -- Reduce Risk	We must try to minimize the vo...	
Corp	Manage Portfolio of Assets		
Corp	Offer Global Presence & Local Service	If we want our customers to se...	

2. On the Objectives page, locate and select (click) the name of the Objective to edit. This opens the Objective record on the Edit Objective page.

NOTE: Optionally, locate the line for the Objective to edit, click the line Actions down arrow, and select Edit from the line Actions menu.

Edit Objective, General Tabbed Page

Objectives

 Print
 Save
 Cancel

Edit Objective: Respect the Environment

General | Advanced | Related Objectives (2) | From - To Gap | Log


Name*

Prefix **Scorecard Reference #**

Owner

Description

Respecting the Environment is not just about having a good image and doing what's right. As British Petroleum learned, it must be at the core of our business practices. Failure to be proactive and diligent about protecting the environment can lead to the collapse of the company.



Allowed extensions are *.gif, *.png, *.jpg, *.jpe, *.jpeg, *.bmp

Measures

Actions ▼

<input type="checkbox"/>	Prefix	Name	Display	Time Period Type	ID	
<input type="checkbox"/>	Corp	<input checked="" type="checkbox"/> % of Mines with "Excellent" air and water quality ratings	<input checked="" type="checkbox"/>	Fiscal Month	106	Actions ▼

3. The General tabbed page displays by default. Do any of the following to edit the Objective record:
 - Change the fields on the **General** tabbed page as necessary. For detailed field descriptions, see [Add a New Objective](#) on page 37.
 - Click the **Advanced**, **Related Objectives**, or **From - To Gap** tabs to edit advanced fields. For detailed field descriptions, see [Add a New Objective](#) on page 37
 - Click the **Log** tab to view a list of actions performed, user names, and dates for modifications that have been made to the Objective.
4. When you are finished editing the Objective record, click **Save** to save the changes, close the Objective record, and return to the Objectives page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the Edit Objective page name) to not save your changes, close the Objective record, and return to the Objectives page.

Maintain Measures that Monitor an Objective

Purpose

Use this procedure to add or remove the linkages to Measures for an Objective.

NOTES

- Measures must be created before they can be linked.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Objectives --> Objective Line Actions --> Edit --> General Tab
- Scorecard Builder --> Objectives --> Click on Objective Name --> General Tab
- Scorecard Builder --> Scorecards --> Scorecard Line Actions --> Edit --> Objectives and/or Objectives Tab --> Objective Line Actions --> Edit --> General Tab
- Scorecard Builder --> Scorecards --> Click on Scorecard name --> Objectives and/or Objectives Tab --> Objective Line Actions --> Edit --> General Tab
- Main Menu --> Scoreboard --> Edit Mode --> Objective Line Actions --> Edit Objective --> General Tab
- Main Menu --> Scoreboard --> Edit Mode --> Objective Line Actions --> Add Measure

STEPS

- From the Menu bar, select **Scorecard Builder / Objectives**.

Objectives Page

The screenshot shows the 'Objectives' page with a search bar and an 'Advanced Search' button. Below the search bar is a table of objectives. The table has columns for 'Prefix Name', 'Name', and 'Description'. The first row is selected, and an 'Actions' dropdown menu is open, showing options: Edit, Delete, Copy, Assign To Scorecard, and Objective View.

Prefix Name	Name	Description	Actions
Corp	Increase Earnings -- Profitable Growth	In order to maintain our acces...	<ul style="list-style-type: none"> Edit Delete Copy Assign To Scorecard Objective View
Corp	Maintain High Margins		
Corp	Minimize Volatility -- Reduce Risk	We must try to minimize the vo...	
Corp	Manage Portfolio of Assets		
Corp	Offer Global Presence & Local Service	If we want our customers to se...	

- On the Objectives page, locate and select (click) the **Name** of the Objective to maintain. This opens the Objective record on the Edit Objective page with the General tabbed page displayed.

NOTE: Optionally, locate the line for the Objective to maintain, click the line Actions down arrow, and select *Edit* from the line Actions menu.

Edit Objective

Objectives

Edit Objective: Respect the Environment Print Save Cancel

General | Advanced | Related Objectives (2) | From - To Gap | Log

Name*
Respect the Environment

Prefix: Corp | Scorecard Reference #: C6

Owner: Bill Barberg

Description

Respecting the Environment is not just about having a good image and doing what's right. As British Petroleum learned, it must be at the core of our business practices. Failure to be proactive and diligent about protecting the environment can lead to the collapse of the company.

<http://betaspsdocs.insightformation.com> Browse
Allowed extensions are *.gif, *.png, *.jpg, *.jpe, *.jpeg, *.bmp

Select

Measures

Actions ▾

<input type="checkbox"/>	Prefix	Name	Display	Time Period Type	ID	
<input type="checkbox"/>	Corp	% of Mines with "Excellent" air and water quality ratings	<input checked="" type="checkbox"/>	Fiscal Month	106	Actions ▾

3. Notice the following about the Measures section of the general tab (found below the Description text box).
- If no records are assigned in this section, a *No records to display* message appears on the first line.
 - Clicking any of the titles in the column heading sorts the list by that column, numerically then alphabetically.
 - The line for each Measure record contains, from left to right, a group Actions checkbox, the Prefix, the Name, and a line Actions menu (appears only if the list shows records).
 - The section has a Select button (above the list on the right side). This button is for adding Measures to the Objective.
 - Each line has a checkbox in the middle that indicates whether or not this Measure will display on the scoreboard listed under the Objective (The default is checked). Un-checking this box will remove the Measure from displaying on the Scoreboard under this Objective but will retain the linkage for maintenance purposes.

Select Measures Dialog Box

Select Measure(s) ✕

search Advanced Search

<input type="checkbox"/>	Prefix	Name	Time Period Type	ID
<input type="checkbox"/>	Corp	Gross Margin %	Fiscal Month	97
<input type="checkbox"/>	Corp	Margin CAGR	Fiscal Month	98
<input type="checkbox"/>	Corp	% Earnings committed to community development	Fiscal Year	117

Page size: 20 67 items in 4 pages

Select and Close Cancel

- a. In the Select Data dialog box, select the checkbox(es) for the Measure record(s) to assign to the Objective.

Maintain Related Objectives

Purpose

Use this procedure to add or remove the linkages of Related Objectives that “drive” this Objective. These Objectives can be Objectives from cascaded scorecards that are drivers, or they can be Objectives that are not on other Scorecards but that provide an added level of detail. Linked Objectives can also be Objectives on the same Strategy Map that are drivers of the Objective being edited.

NOTES

- Related Objectives must be added before they can be linked.
- To view what Objectives are related to an Objective view the Objective Presentation View for the appropriate item.
- Related Objectives can also be viewed by clicking the Related Objectives icon on the Scoreboard View. (The related Objectives appear on the Objectiveboard page.)

Alternative Ways to Access this Procedure

- Scorecard Builder --> Objectives --> Objective Line Actions --> Edit --> Impacts Tab
- Scorecard Builder --> Objectives --> Click on Objective Name --> Impacts Tab
- Scorecard Builder --> Scorecards --> Scorecard Line Actions --> Edit --> Objectives and/or Objectives Tab --> Objective Line Actions --> Edit --> Impacts Tab
- Scorecard Builder --> Scorecards --> Click on Scorecard name --> Objectives and/or Objectives Tab --> Objective Line Actions --> Edit --> Impacts Tab
- Main Menu --> Scoreboard --> Edit Mode --> Objective Line Actions --> Edit Objective --> Impacts Tab
- Scorecard Builder --> Measures --> Add New Button --> Impacted By Tab

STEPS

1. From the Menu bar, select **Scorecard Builder / Objectives**.

Objectives Page

The screenshot shows the 'Objectives' page interface. At the top left is the 'Objectives' header with a target icon. To the right are 'Print' and 'Add New' buttons. Below the header is a search bar with a magnifying glass icon and a green arrow labeled 'Advanced Search'. Underneath is an 'Actions' dropdown menu. The main content is a table with the following data:

Prefix Name	Name	Description	Actions
Corp	Increase Earnings -- Profitable Growth	In order to maintain our acces...	<ul style="list-style-type: none"> Edit Delete Copy Assign To Scorecard Objective View
Corp	Maintain High Margins		
Corp	Minimize Volatility -- Reduce Risk	We must try to minimize the vo...	
Corp	Manage Portfolio of Assets		
Corp	Offer Global Presence & Local Service	If we want our customers to se...	

2. On the Objectives page, locate and select (click) the **Name** of the Objective to maintain. This opens the Objective record on the Edit Objective page with the General tabbed page displayed.

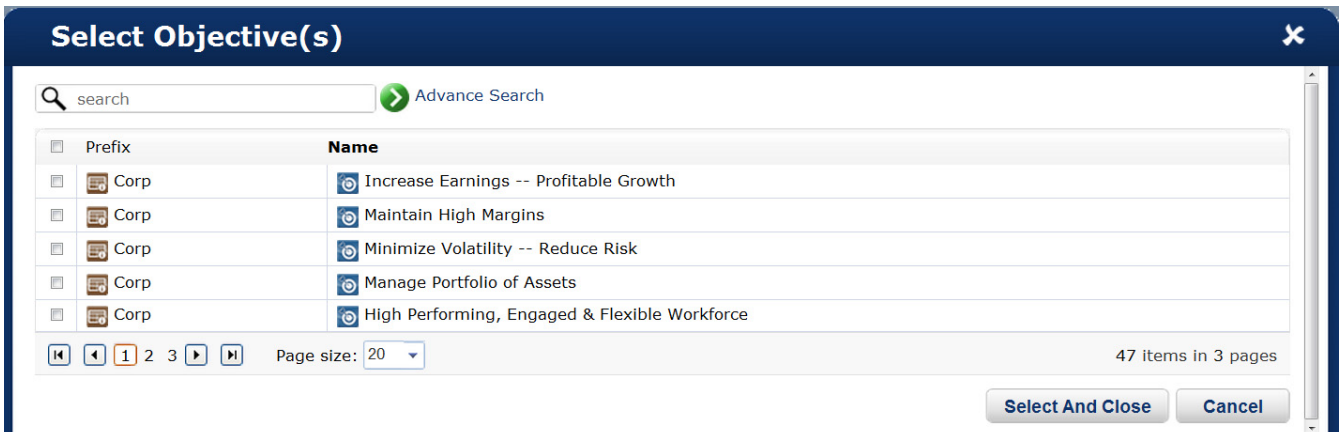
NOTE: Optionally, locate the line for the Objective to maintain, click the line Actions down arrow, and select Edit from the line Actions menu.

Edit Objective, Related Objectives Tabbed Page



3. On the general tab, locate and select (click) the **Related Objectives** tab.
4. Notice the following about the **Related Objectives** tab.
 - If no records are assigned, a *No records to display* message appears on the first line.
 - Clicking any of the titles in the column heading sorts the list by that column, numerically then alphabetically (that is, by number and then letter).
 - The line for each Objective record contains, from left to right, the Prefix, the Name, the Description, and a line Actions menu (appears only if the list shows records).

Select Objectives Dialog Box



- a. In the Select Data dialog box, select the checkbox(es) for the Objective record(s) to assign to the Objective.
 - b. Click the **Select and Close** button.
5. Optionally, to remove a Related Objective from the Objective, locate the line for the Objective to remove, click the line **Actions down arrow**, and select **Remove** from the line Actions menu.
 6. When you are finished maintaining the Objective record, click **Save** to save the changes, close the Objective record, and return to the Objectives page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the Edit Objective page name) to not save your changes, close the Objective record, and return to the Objectives page.

Delete an Objective

Purpose

Use this procedure to delete one or more Objective records.

NOTES

- When deleting an Objective record, all *linkages* to and from other items such as Measures are deleted. However, the linked items themselves are not deleted.

STEPS

1. From the Menu bar, select **Scorecard Builder / Objectives**.

Objectives Page

The screenshot shows the 'Objectives Page' interface. At the top left is a search bar with a magnifying glass icon and the text 'search', followed by a green arrow icon and the text 'Advanced Search'. To the right of the search bar are 'Print' and 'Add New' buttons. Below the search bar is a table with the following columns: 'Prefix Name', 'Name', and 'Description'. The table contains six rows of objective records. The first row is selected, and an 'Actions' dropdown menu is open over it, showing options: 'Edit', 'Delete', 'Copy', 'Assign To Scorecard', and 'Objective View'.

Prefix Name	Name	Description
Corp	Increase Earnings -- Profitable Growth	In order to maintain our acces...
Corp	Maintain High Margins	
Corp	Minimize Volatility -- Reduce Risk	We must try to minimize the vo...
Corp	Manage Portfolio of Assets	
Corp	Offer Global Presence & Local Service	If we want our customers to se...

2. Do either of the following:
 - To delete one Objective, locate the line for the Objective record to delete, click the line **Actions down arrow**, and select **Delete** from the line Actions menu.
 - To delete one or more Objectives, select the group Actions checkbox for each Objective record to delete, click the group **Actions down arrow**, and select **Delete** from the group Actions menu.
3. A message appears to confirm the Objective deletion. Click **OK** to delete the Objective(s) or click **Cancel** to not delete the Objective(s)
4. One or more other messages may appear. If so, for each message, click **OK** or **Cancel** as appropriate.

Chapter 6: Measures

Overview

Measures are an important part of a Strategy Management System, and InsightVision has rich functionality to support strategic measurement—capabilities that are often different from a typical data-centered operational dashboard.

Measures are associated with Objectives. Users ability to view Measures is based on access to Scorecards (which are groups of Objectives). However, since Measures can be set to not display with an Objective, not every Measure must show each time the User views an Objective.

Measures can be viewed in several ways:

- Under the Objectives in the Scoreboard page or Objectiveboard page
- In the Measure-at-a-Glance View (access in many different ways)
- As Tablets under the Objective in the Objective Presentation View
- In the Tablet View or Line View as part of My Featured Measures (on both the home page and on the full-page report.
- On the Measureboard (drilling down from a Measure to see either sub-index Measures or associated Measures)
 - Measureboards can show both Measures that were used to calculate a Measure (called Sub-Index Measures) or Measures that are simply associated with a Measure.
 - A useful technique for Objectives that have many potential measures is to have several measures associated with an Objective, but only have one of those measures displayed with the Objectives. The rest of the Measures can be associated with the Measure that is displayed, and they will be available by clicking on the “Associated Measures” icon.

Measures have Targets, Colorbands and Actual Values. If preferred, the Measure can be defined to show a projected Forecast rather than a target. A Forecast only shows for future months, and it is graphically shown as an extension of the trend line (shown as a red dashed line).

- [View the Measures List](#) on page 50
- [Add a New Measure](#) on page 51
- [Edit a Measure](#) on page 55
- [Maintain Associated Measures](#) on page 57
- [Delete a Measure](#) on page 59
- [Maintain Data Values for a Measure](#) on page 60

View the Measures List

Purpose

Use this procedure to view the Measures page, which lists the Measures records in the InsightVision application.

STEPS

- From the Menu bar, select **Scorecard Builder / Measures**.

Measures Page

Prefix Name	Name	Time Period Type	ID	Actions
Corp	Quality Perception Survey (% top 2 of 7)	Fiscal Quarter	104	Actions
Corp	% Earnings committed to community development	Fiscal Year		Edit
J Mine	Quality Perception Survey (% top 2 of 7)	Fiscal Quarter		Delete
Corp	Gross Margin %	Fiscal Month		Copy
Corp	Margin CAGR	Fiscal Month		Assign To Featured Measures
Corp	% of assets performing at or above corporate hurdle rate	Fiscal Month		Assign To Monitor Objective
				Show Measure at a Glance View

- Notice the following about the Measures page:

- The Measure list has a column heading line and contains one line for each Measure record. The list is empty if no Measures have been added.
- Clicking the word Name in the column heading sorts the records alphabetically.
- The line for each Measure record contains, from left to right, a group Actions checkbox, the prefix name, the Measure Name, Time Period Type, ID, and a line Actions menu (all described below).
 - » The group Actions checkbox is for selecting one or more records and applying a group Actions menu command, described below.
 - » Each Measure name is a link that opens the Measure record. Clicking a Measure name opens the record on the Edit Measure page. See [Edit a Measure](#) on page 55
 - » The Time Period Type column displays the frequency that the Measure is reported.
 - » The ID column lists the Measure ID # for this Measure. This ID # distinguishes this from similarly named Measures. It is used for data importing and other administrative functions.
 - » The line Actions menu provides access to functions related to Measure records, such as edit, copy, and delete.
- The group Actions menu, above the list of records (on the left side), is for applying commands to one or more Measures selected by using the group Actions checkboxes.
- The **Print** and **Add New** commands, at the top right corner of the page, are for printing and adding new Measures.

Add a New Measure

Purpose

Use this procedure to add a new Measure record.

STEPS

1. From the Menu bar, select **Scorecard Builder / Measures**.

Measures Page

NOTE: For a detailed description of the Measures page, see [View the Measures List on page 50](#)

The screenshot shows the 'Measures' page interface. At the top left is a 'Measures' header with a chart icon. To the right are 'Print' and 'Add New' buttons. Below the header is a search bar with a magnifying glass icon and an 'Advanced Search' button with a green arrow. Underneath is an 'Actions' dropdown menu. The main content is a table with columns: 'Prefix Name', 'Name', 'Time Period Type', and 'ID'. The table contains several rows of measure data. A context menu is open over the table, listing actions: 'Edit', 'Delete', 'Copy', 'Assign To Featured Measures', 'Assign To Monitor Objective', and 'Show Measure at a Glance View'.

Prefix Name	Name	Time Period Type	ID	Actions
Corp	Quality Perception Survey (% top 2 of 7)	Fiscal Quarter	104	Actions
Corp	% Earnings committed to community development	Fiscal Year		Edit
J Mine	Quality Perception Survey (% top 2 of 7)	Fiscal Quarter		Delete
Corp	Gross Margin %	Fiscal Month		Copy
Corp	Margin CAGR	Fiscal Month		Assign To Featured Measures
Corp	% of assets performing at or above corporate hurdle rate	Fiscal Month		Assign To Monitor Objective
				Show Measure at a Glance View

- On the Measures page, click **Add New**.

Add New Measure, General Tabbed Page

- Complete the following fields on the General tabbed page:

Name*	Type up to 65 characters for the name of the Measure.
Description	Type a description for the Measure.
Prefix	Select the prefix to use for this Measure.
Polarity (Direction Type)	The Measure polarity indicates what direction is preferable for this trend and will determine which direction arrow is green on the scoreboard. (e.g. Up is preferred and Green or Up is not preferred and Red).
Time Period Type	The time period type is used to determine the frequency of reporting for this Measure. (i.e. how often the Measure data will be entered in). NOTE: Once the Measure has been created, the time period type may only be changed if no Data Values exist.
Scorecard Reference #	The scorecard reference # displays on the scoreboard after the prefix and before the Measure name. It is commonly used to match up Measure designations with pre-existing numbering/labeling systems in your organization.
Unit of Measure	The unit of measure determines the format for the data values entered for the Measure
Owner	Select an owner for this Measure.

- Click the **Advanced** tab.

Add New Measure, Advanced Tabbed Page

The screenshot shows the 'Advanced' tab of the 'Edit Measure' interface. The title is 'Edit Measure: Cost of waste (\$ per ton produced)'. The tabs include 'General', 'Advanced', 'Data Values (12)', 'Associated Measures (11)', 'Maintainers (0)', and 'Log'. The 'Advanced' tab is active, showing the following fields and options:

- System ID:** 114
- Document Link:** A text input field with a 'Browse' button and a 'Preview' link.
- Report Link:** A text input field with a 'Browse' button and a 'Preview' link.
- Analysis Link:** A text input field with a 'Browse' button and a 'Preview' link.
- Custom Trend Chart Values:** Radio buttons for 'Automatic(Default)' (selected) and 'Custom Y-Axis Value'. Below are 'Minimum' and 'Maximum' input fields.
- Past Periods:** A checked checkbox 'All' and a dropdown menu.
- Future Periods:** A checked checkbox 'All' and a dropdown menu.
- Short Name:** 'Cost of waste (\$ per ton produced)'
- Auto Approve:** A checked checkbox.
- Use Targets as Forecast:** An unchecked checkbox.
- Do Not Display Targets:** An unchecked checkbox.
- Measure Type:** A dropdown menu set to 'Basic'.

- Complete the following fields on the Advanced tabbed page:

System ID	This ID # is used to distinguish this from similarly named Measures. It is used for data importing and other administrative functions.
Document Link	Enter a link to an external report/webpage or browse/upload for a file that has been uploaded into InsightVision. NOTE: Links to external websites must be entered in the following format: http://www.webpage.com
Custom Trend Chart Values	The custom trend chart values fields can be used to set custom values for the trend chart's Y-axis. This setting affects the Tablet view charts as well as the Turn the Curve charts.
Report Link	Enter a link to an external report/webpage or browse/upload for a file that has been uploaded into InsightVision. NOTE: Links to external websites must be entered in the following format: http://www.webpage.com
Auto Approve	Check this box to have all actual values that are entered into this Measure be automatically approved and displayed on the scoreboard. Default is checked.

Analysis Link	Enter a link to an external report/webpage or browse/upload for a file that has been uploaded into InsightVision. NOTE: Links to external websites must be entered in the following format: http://www.webpage.com
Display forecasts using target values	Check this box to use the target values field, while adding actual values, to project a dotted red forecast line on the charts. This setting affects the tablet view and the turn the curve. NOTE: Checking this box will prevent the solid red target line from appearing on the charts.
Short Name	Leave this field empty.
Do Not Display Targets	Check this box to hide the target values from being plotted on the graphs. This setting affects the tablet view as well as the turn the curve screen.
Measure Type	Select the Measure type. Basic – A Basic Measure can have data values entered directly in the software and display on the scoreboard. Calculated – Calculated Measures use other Basic Measures to calculate its data values. Selecting this option will display the calculation method drop-down and the Calculated Measure selection field where you can associate basic measures.
Calculation Method (Calculated Measures only)	Select the calculation method by which this Measure will calculate its values from the basic Measures. Sum – Displays a value for the Calculated Measure by adding up all the values in the basic Measures. Ratio – Displays a percentage by dividing two basic Measures. Select a weight of 1 for the numerator and 2 for the denominator. (Max 2 basic Measures) Weighted Average – Displays an average of all Basic Measures. Use the weight field to determine what weight is given to each Basic Measure. NOTE: Additional Calculated Methods can be added. For details, contact your InsightVision Account Representative.

- Optionally, to assign associated Measures to this Measure use the Associated Measures tab. Otherwise, skip this step. For specific steps, see [Maintain Associated Measures](#) on page 57
- Click **Save** to save and close the new Measure record and to return to the Measures page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the Add Measure page name) to not save your changes, close the Measure record, and return to the Measures page.

Edit a Measure

Purpose

After adding a Measure record, you can change the Measure properties. Use this procedure to change (edit) a Measure record.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Measures --> Measure Line Actions --> Edit
- Scorecard Builder --> Measures --> Click on Measure Name
- Measure at a Glance --> Edit
- Scoreboard --> Edit Mode --> Measure Line Actions --> Edit Measure

STEPS

1. From the Menu bar, select **Scorecard Builder / Measures**.

Measures Page

The screenshot shows the 'Measures' page with a search bar and an 'Advanced Search' button. Below is a table of measures with an 'Actions' dropdown menu open over the first row.

Prefix Name	Name	Time Period Type	ID	Actions
Corp	Quality Perception Survey (% top 2 of 7)	Fiscal Quarter	104	Actions ▼
Corp	% Earnings committed to community development	Fiscal Year		Edit
J Mine	Quality Perception Survey (% top 2 of 7)	Fiscal Quarter		Delete
Corp	Gross Margin %	Fiscal Month		Copy
Corp	Margin CAGR	Fiscal Month		Assign To Featured Measures
Corp	% of assets performing at or above corporate hurdle rate	Fiscal Month		Assign To Monitor Objective
				Show Measure at a Glance View

2. On the Measures page, locate and select (click) the name of the Measure to edit. This opens the Measure record on the Edit Measure page.

NOTE: Optionally, locate the line for the Measure to edit, click the line Actions down arrow, and select Edit from the line Actions menu.

Maintain Associated Measures

Purpose

Use this procedure to add or remove the linkages between a Measure and its Associated Measures

NOTES

- Measures must be added before they can be linked.
- Associated Measures are linked through the scoreboard by clicking on the tree icon.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Measures --> Measure Line Actions --> Edit --> Associated Measures Tab
- Scorecard Builder --> Measures --> Click on Measure Name --> Associated Measures Tab
- Measure at a Glance --> Edit --> Associated Measures Tab
- Main Menu --> Scoreboard --> Edit Mode --> Measure Line Actions --> Edit Measure --> Associated Measures Tab

STEPS

1. From the Menu bar, select **Scorecard Builder / Measures**.

Measures Page

The screenshot shows the 'Measures' page interface. At the top left is a 'Measures' header with a line graph icon. To the right are 'Print' and 'Add New' buttons. Below the header is a search bar with a magnifying glass icon and an 'Advanced Search' button. Underneath is an 'Actions' dropdown menu. The main content is a table with the following columns: Prefix Name, Name, Time Period Type, and ID. The table contains several rows of measures. The first row is selected, and its 'Actions' dropdown menu is open, showing options: Edit, Delete, Copy, Assign To Featured Measures, Assign To Monitor Objective, and Show Measure at a Glance View.

Prefix Name	Name	Time Period Type	ID	Actions
Corp	Quality Perception Survey (% top 2 of 7)	Fiscal Quarter	104	Actions ▼
Corp	% Earnings committed to community development	Fiscal Year		
J Mine	Quality Perception Survey (% top 2 of 7)	Fiscal Quarter		
Corp	Gross Margin %	Fiscal Month		
Corp	Margin CAGR	Fiscal Month		
Corp	% of assets performing at or above corporate hurdle rate	Fiscal Month		

2. On the Measures page, locate and select (click) the **Name** of the Measure to maintain. This opens the Measure record on the Edit Measure page with the General tabbed page displayed.

NOTE: Optionally, locate the line for the Measure to maintain, click the line Actions down arrow, and select Edit from the line Actions menu.

Edit Measure, Associated Measures Tabbed Page

3. Locate and select (click) the **Associated Measures** tab.
4. Notice the following about the **Associated Measures** tab.
 - If no records are assigned in either section, a *No records to display* message appears on the first line.
 - Clicking any of the titles in the column heading sorts the list by that column, numerically then alphabetically (that is, by number and then letter).
 - The line for each Measure record contains, from left to right, the Prefix, the Name, and a line Actions menu (appears only if the list shows records).

Select Measures Dialog Box

- a. In the Select Data dialog box, select the checkbox(es) for the Measure record(s) to assign to the Measure.
- b. Click the **Select and Close** button.
5. Optionally, to remove an Associated Measure from the Measure, do the following:
 - To remove one associated Measure, locate the line for the Measure to remove, click the line **Actions down arrow**, and select **Remove** from the line Actions menu.
 - To remove one or more associated Measure(s), select the group Actions checkbox for each Measure record to remove, click the group **Actions down arrow**, and select **Remove** from the group Actions menu.
6. When you are finished maintaining the Measure record, click **Save** to save the changes, close the Measure record, and return to the Measures page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the Edit Measure page name) to not save your changes, close the Measure record, and return to the Measures page.

Delete a Measure

Purpose

Use this procedure to delete one or more Measure records.

NOTES

- When deleting a Measure record, all *linkages* to and from other items such as Objectives are deleted. However, the linked items themselves are not deleted.
- All Data Values that have been entered into the Measure will also be deleted.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Measures --> Measure Line Actions --> Delete
- Scorecard Builder --> Measures --> Measure Group Actions --> Delete

STEPS

1. From the Menu bar, select **Scorecard Builder / Measures**.

Measures Page

The screenshot shows the 'Measures' page interface. At the top, there's a 'Measures' header with a search bar and an 'Advanced Search' button. Below that, there's an 'Actions' dropdown menu. The main content is a table with the following columns: Prefix Name, Name, Time Period Type, and ID. The table contains several rows of measure data. An 'Actions' dropdown menu is open over the first row, showing options: Edit, Delete, Copy, Assign To Featured Measures, Assign To Monitor Objective, and Show Measure at a Glance View.

Prefix Name	Name	Time Period Type	ID	Actions
Corp	Quality Perception Survey (% top 2 of 7)	Fiscal Quarter	104	Actions ▼
Corp	% Earnings committed to community development	Fiscal Year		
J Mine	Quality Perception Survey (% top 2 of 7)	Fiscal Quarter		
Corp	Gross Margin %	Fiscal Month		
Corp	Margin CAGR	Fiscal Month		
Corp	% of assets performing at or above corporate hurdle rate	Fiscal Month		

2. Do either of the following:
 - To delete one Measure, locate the line for the Measure record to delete, click the line **Actions down arrow**, and select **Delete** from the line Actions menu.
 - To delete one or more Measures, select the group Actions checkbox for each Measure record to delete, click the group **Actions down arrow**, and select **Delete** from the group Actions menu.
3. A message appears to confirm the Measure deletion. Click **OK** to delete the Measure(s) or click **Cancel** to not delete the Measure(s)
4. One or more other messages may appear. If so, for each message, click **OK** or **Cancel** as appropriate.

Maintain Data Values for a Measure

Purpose

Use this procedure to add or remove data values from a Measure

NOTES

- A Measure must be created before data values can be added to it.
- Users with the role of presenter can enter data using the data entry menu option.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Measures --> Add New Button --> Data Values Tab
- Scorecard Builder --> Measures --> Measure Line Actions --> Edit --> Data Values Tab
- Scorecard Builder --> Measures --> Click on Measure Name --> Data Values Tab
- Measure Turn the Curve --> Edit --> Data Values Tab
- Main Menu --> Scoreboard --> Edit Mode --> Measure Line Actions --> Edit Measure --> Data Values Tab
- Scorecard Builder --> Data Entry --> Click on Measure Name
- Scorecard Builder --> Data Entry --> Measure Line Actions --> Add Data Values
- Main Menu --> Scoreboard --> Edit Mode --> Measure Line Actions --> Add Data Values

STEPS

1. From the Menu bar, select **Scorecard Builder / Measures**.

Measures Page

The screenshot shows the 'Measures' page interface. At the top, there's a 'Measures' header with a search bar and an 'Advanced Search' button. Below this is an 'Actions' dropdown menu. The main content is a table with the following columns: Prefix Name, Name, Time Period Type, and ID. The table lists several measures, including 'Quality Perception Survey (% top 2 of 7)' and '% Earnings committed to community development'. An 'Actions' dropdown menu is open for the first measure, showing options like Edit, Delete, Copy, Assign To Featured Measures, Assign To Monitor Objective, and Show Measure at a Glance View.

Prefix Name	Name	Time Period Type	ID
Corp	Quality Perception Survey (% top 2 of 7)	Fiscal Quarter	104
Corp	% Earnings committed to community development	Fiscal Year	
J Mine	Quality Perception Survey (% top 2 of 7)	Fiscal Quarter	
Corp	Gross Margin %	Fiscal Month	
Corp	Margin CAGR	Fiscal Month	
Corp	% of assets performing at or above corporate hurdle rate	Fiscal Month	

2. On the Measures page, locate and select (click) the **Name** of the Measure to maintain. This opens the Measure record on the Edit Measure page with the General tabbed page displayed.

NOTE: Optionally, locate the line for the Measure to maintain, click the line Actions down arrow, and select Edit from the line Actions menu.

Edit Measure, Data Values Tabbed Page

Measures

Edit Measure: Cost of waste (\$ per ton produced) Print Save Cancel

General | **Data Values (12)** | Associated Measures (11) | Maintainers (0) | Log

Default Targets and Color Bands

Target Value	Color Band			Actions
\$140	0 to \$140	\$140 to \$170	\$170+	Actions

Data Values

Actions: Import Values, Add New, Edit All

<input type="checkbox"/>	Time Period	Target Value	Actual Value	Approved	Color Band	Actions
<input type="checkbox"/>	DEC 2009	\$140			0 to \$140, \$140 to \$170, \$170+	Actions
<input type="checkbox"/>	NOV 2009	\$140			0 to \$140, \$140 to \$170, \$170+	Actions

Page size: 20 | 12 items in 1 pages

3. Locate and select (click) the **Data Values** tab.

4. Notice the following about the **Data Values** tab.

- There are two sections:
- **Default Target Values and Color Bands** – Use this section to configure the default target value and color bands for this Measure. Configuring the defaults for targets and color bands prevents the user from having to enter in this information for each data value entered. Once the defaults have been configured they can be applied by click the brown D icon while entering data values.
- **Data Values** – This table displays the current data values for the Measure. The line for each data value record contains, from left to right, the Time Period, Target Value, Actual Value, Approved, and the Color Bands.
 - » **Time Period** – Displays the time period for the actual value.
 - » **Target Value** – Displays the target value for this data value.
 - » **Actual Value** – Displays what the data value actually was for this time period.
 - » **Approved** – Displays the approved status for this data value. Unapproved data values will not display on the scoreboard and have a blank check box.
 - » **Color Band** – This section displays the color bands that apply to this Measure. Color bands start with 0 from the left and display the upper threshold as a numerical value inside each color band.
- If no records are assigned in either section, a *No records to display* message appears on the first line.
- Clicking any of the titles in the column heading sorts the list by that column, numerically then alphabetically (that is, by number and then letter).

- To add a new data value select (click) the **Add New** button in the Data Values section.

Add Data Values Dialog Box

Value	Included	Color	
Infinity(-) to 140	<input checked="" type="checkbox"/>	Green	Delete
140.00000 to 170	<input checked="" type="checkbox"/>	Yellow	Delete
170.00000 to Infinity(+)	<input checked="" type="checkbox"/>	Red	Delete

- In the Add Data Values Dialog Box select the checkbox next to the Time Period(s) you would like to add data for.
- Enter a Target Value, Actual Value, and Color Band –OR–select the brown defaults (D) icon.
- Click the **Save button**.

NOTE: Optionally, if you choose to enter multiple data values at once, select multiple years in the Add Data Values Dialog Box and leave the Actual Value box empty. Once you have saved the records, select the Edit All button from the Data Values section of the Data Values tab to enter multiple actual values at once.

- Optionally, to remove a Data Value from the Measure, do the following:
 - To remove one data value, locate the line for the data value to remove, click the line **Actions down arrow**, and select **Delete** from the line Actions menu.
 - To remove one or more data value(s), select the group Actions checkbox for each data value record to remove, click the group **Actions down arrow**, and select **Delete** from the group Actions menu.
- When you are finished maintaining the Measure record, click **Save** to save the changes, close the Measure record, and return to the Measures page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the Edit Measure page name) to not save your changes, close the Measure record, and return to the Measures page.

Chapter 7: Initiatives

Overview

Initiatives (also called Strategic Initiatives) are projects (or groups of projects) that are intended to accomplish Objectives (as monitored by the Measures). In InsightVision, it is possible to switch the language to refer to Initiatives as Projects, but in this documentation, we'll use the standard Balanced Scorecard terms.

Initiatives are often updated more frequently than Measures, and this is often where the “rubber meets the road” for strategy execution. A Strategy Management System not only helps organizations prioritize projects for the greatest impact, but it provides a centralized place to communicate how projects are progressing—even if the individual projects are being managed in different ways with different tools. Strategic Initiative Management is primarily about monitoring many different projects—not the detailed project management.

Initiatives are viewed in several ways:

- Initiatives that support a Measure can be viewed by clicking on the project folder Icon next to a Measure on the Scoreboard page, Objectiveboard page or Measureboard page.
- Initiatives that support a Measure are listed at the bottom of the Measure-at-a-Glance View (accessed in many different ways)
- The Initiative Monitor report shows all the Initiatives that are related to any selected Scorecard (linked via Measures to the Objectives on that Scorecard)
- They are shown on My Featured Initiatives (on both the home page and on the full-page report).
- Initiatives details can be viewed in the Initiative Presentation View
- Initiatives can be displayed as “Sub-Initiatives” if a Parent Initiative is selected.

Initiatives have additional access rights that can be granted to each Initiative. Users who are “Assigned To” or “Assigned By” Owners have the ability to edit the status of the Initiatives even if they don't normally have Scorecard Builder rights.

This chapter includes the following sections for adding and maintaining Initiative records in the InsightVision application.

- [The Difference between Objectives and Initiatives](#) on page 64
- [View the Initiatives List](#) on page 65
- [Add a New Initiative](#) on page 66
- [Edit an Initiative](#) on page 70
- [Maintain Tasks for an Initiative](#) on page 72
- [Maintain Sub Initiatives for an Initiative](#) on page 74
- [Maintain Measures that an Initiative Affects](#) on page 76
- [Delete an Initiative](#) on page 79

The Difference between Objectives and Initiatives

One of the biggest areas of confusion for people getting started with the BSC Methodology is the difference between Objectives and Initiatives. Initiatives are different from Objectives in that Objectives tend to be on-going strategic priorities that can be measured over time to see if there is progress. Objectives are never “finished” (although if the strategy changes or if sufficient progress is made, an Objective may no longer be a top priority and it may be replaced with other Objectives). Over time, there are typically several Initiatives that are launched to help make positive progress with the Objective. Unlike Objectives, Initiatives usually have start dates, end dates and budgets. In some cases, an Initiative may be at a higher level and the specific projects may fall underneath it as Sub-Initiatives, but they still have the general characteristics of a Project. Initiatives typically can be assigned a “Percent Complete” whereas Objectives cannot. For example, “Reduce Production Cycle Time” would be an Objective, and the Measure could be the average cycle time. The Initiatives would be specific projects that would be launched to accomplish the Objective. As projects are completed, the Measure should be moving right direction. Clear Objectives create focus and help prioritize the selection of the most valuable Initiatives. Linking Initiatives to Measures creates an accountability for Project leaders, since the relationship between the Initiatives and the Measures they are intended to impact remains visible—rather than being quickly forgotten after the business case for funding the project is completed.

View the Initiatives List

Purpose

Use this procedure to view the Initiatives page, which lists the Initiatives records in the InsightVision application.

STEPS

1. From the Menu bar, select **Scorecard Builder / Initiatives**.

Initiatives Page

The screenshot shows the 'Initiatives' page interface. At the top left is a red folder icon labeled 'Initiatives'. To the right are 'Print' and 'Add New' buttons. Below is a search bar with a magnifying glass icon and a green arrow icon labeled 'Advanced Search'. Underneath is an 'Actions' dropdown menu. The main content is a table with the following data:

<input type="checkbox"/>	Prefix	Name	Status	% Complete	Assigned To	Actions
<input type="checkbox"/>	Corp	Portfolio Evaluation	On-Track	25%	Cheryl Mayberry	
<input type="checkbox"/>	Corp	Root Cause Analysis on Late Shipments	On-Track	22%	B Aslani	Edit
<input type="checkbox"/>	Corp	Write letter to local environmental group	Not Started	0%	Paul Halvc	Delete
<input type="checkbox"/>	newpre	My project	On-Track	34%	None	Assign to Initiative
						Initiative Presentation View

2. Notice the following about the Initiatives page:

- The Initiative list has a column heading line and contains one line for each Initiative record. The list is empty if no Initiatives have been added.
- Clicking the word Name in the column heading sorts the records alphabetically.
- The line for each Initiative record contains, from left to right, a group Actions checkbox, the prefix name, the Initiative Name, Status, % Complete, Assigned To, and a line Actions menu (all described below).
 - » The group Actions checkbox is for selecting one or more records and applying a group Actions menu command, described below.
 - » Each Initiative name is a link that opens the Initiative record. Clicking an Initiative name opens the record on the Edit Initiative page. See [Edit an Initiative](#) on page 70.
 - » The Status column displays the Initiative status and color for easy viewing
 - » The % Complete column displays the completion % of the Initiative according to the latest update.
 - » The Assigned To column displays the name of the person responsible for this Initiative.
 - » The line Actions menu provides access to functions related to Initiative records, such as edit, copy, and add.
- The group Actions menu, above the list of records (on the left side), is for applying commands to one or more Initiatives selected by using the group Actions checkboxes.
- The Print and Add New commands, at the top right corner of the page, are for printing and adding new Initiatives.

Add a New Initiative

Purpose

Use this procedure to add a new Initiative record.

STEPS

1. From the Menu bar, select **Scorecard Builder / Initiatives**.

Initiatives Page

NOTE: For a detailed description of the Initiatives page, see [View the Initiatives List](#) on page 65.

The screenshot shows the 'Initiatives' page interface. At the top left is a folder icon labeled 'Initiatives'. To the right are 'Print' and 'Add New' buttons. Below is a search bar with a magnifying glass icon and a green arrow labeled 'Advanced Search'. Underneath is an 'Actions' dropdown menu. The main content is a table with columns: Prefix, Name, Status, % Complete, and Assigned To. The table contains four rows of initiative data. A context menu is open over the third row, showing options: Edit, Delete, Assign to Initiative, and Initiative Presentation View.

Prefix	Name	Status	% Complete	Assigned To	Actions
Corp	Portfolio Evaluation	On-Track	25%	Cheryl Mayberry	
Corp	Root Cause Analysis on Late Shipments	On-Track	22%	B Aslani	Edit Delete Assign to Initiative Initiative Presentation View
Corp	Write letter to local environmental group	Not Started	0%	Paul Halvc	
newpre	My project	On-Track	34%	None	

2. On the Initiatives page, click **Add New**.

Add New Initiative, General Tabbed Page

The screenshot shows the 'Add New Initiative' form. At the top left is a folder icon with a green plus sign and the text 'Add New Initiative:'. To the right are 'Print', 'Save', and 'Cancel' buttons. Below is a tabbed interface with tabs for 'General', 'Advanced', 'Tasks (0)', 'User Defined Fields', and 'Associated Files (0)'. The 'General' tab is active. It contains several input fields: 'Name*' (required), 'Prefix' (dropdown menu), 'Status' (dropdown menu), 'Color' (dropdown menu), 'Percent Complete' (text input), 'Parent Initiative' (dropdown menu), and 'Status Update' (text area). There is a large 'Description' text area on the right. Below these fields is a section 'Measures This Initiative Affects' with a 'Select' button. At the bottom, there is an 'Actions' dropdown menu and a table with columns 'Prefix' and 'Name', which currently shows 'No records to display.'

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

Name*	Type up to 65 characters for the name of the Initiative.
Description	Type a description of the Initiative. This field displays on the Initiative Presentation view.
Prefix	Select the prefix to use for this Initiative.
Parent Initiative	If this Initiative is a sub-Initiative, select the parent Initiative, if it is a stand alone or top level Initiative leave this field on the default None. NOTE: <i>If a parent Initiative is selected, this Initiative will display on the Sub Initiatives page of the parent Initiative. It will also display on the sub Initiatives section of the Initiative presentation of the parent Initiative.</i>
Status	Select the current status of this Initiative.
Color	Select the color that will display behind the Initiative status. This gives users a quick reference as to the status of the Initiative.
Percent Complete	Enter the percentage complete the Initiative is. Values should be between 0 and 100.
Measures this Initiative Affects	This section lists out each Measure that this Initiative is linked to. Use the select button to add additional Measures and the Actions menus to remove them. NOTE: <i>This Initiative will display on all linked Measures' Measure at a Glance reports and as a red folder icon in line with the Measures on the Scoreboard and Related Measure screens.</i>

- Click the **Advanced** tab.

Add New Initiative, Advanced Tabbed Page

The screenshot shows the 'Edit Initiative: Portfolio Evaluation' page. At the top, there are icons for 'Print', 'Save', and 'Cancel'. Below these are tabs for 'General', 'Advanced', 'Tasks (0)', 'Sub Initiatives (0)', 'User Defined Fields', 'Associated Files (0)', and 'Log'. The 'Advanced' tab is selected. The form contains the following fields:

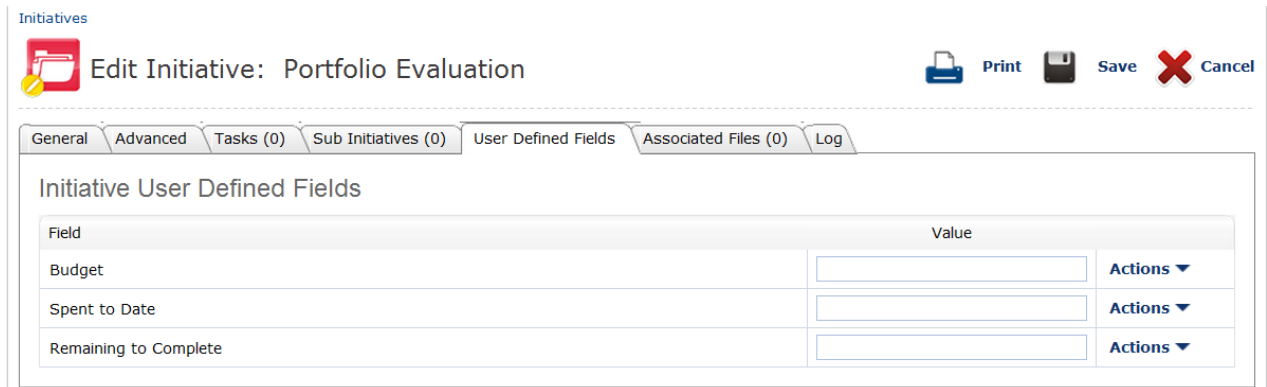
- Assigned To:** Cheryl Mayberry (dropdown menu)
- Assigned By:** Bill Barberg (dropdown menu)
- Start Date:** 5/2/2010 (calendar icon)
- End Date:** 8/27/2010 (calendar icon)
- Charter Document Link:** (text input field with a 'Browse' button and a 'Preview' link below it)

- Complete the following fields on the Advanced tabbed page:

Assigned To	Select a user to assign the Initiative to.
Assigned By	Select the user who assigned this Initiative to the assignee. (Default is the logged in user)
Start Date	Click on the calendar icon to select the Initiative start date
End Date	Click on the calendar icon to select the Initiative end date
Charter Document Link	To link a document to this Initiative, click the Browse button and then select the document from the File Manager dialog box that appears. For example, link a document that describes the purpose or background of this Initiative. NOTE: The document link appears on the Initiative Presentation View.

- Click the **User Defined Fields** tab.

Add New Initiative, User Defined Fields Tabbed Page



- Complete the following fields on the User Defined Fields tabbed page:

Budget	Enter the Initiative budget
Spent to Date	Enter the amount (\$) spent to date
Remaining to Complete	Enter the amount (\$) remaining to complete the Initiative

NOTE: All user defined fields can be customized. To add, edit, or delete user defined fields contact your InsightVision administrator.

- Click the **Associated Files** tab.
- Attach files to this Initiative by using the select button
- Once files have been attached, use the document type column to indicate the type of document

NOTE: Optionally, use the line or group Actions to remove documents from the Initiative.

- Click **Save** to save and close the new Initiative record and to return to the Initiatives page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the Add Initiative page name) to not save your changes, close the Initiative record, and return to the Initiatives page.

Edit an Initiative

Purpose

After adding an Initiative record, you can change the Initiative properties. Use this procedure to change (edit) an Initiative record.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Initiatives --> Click on Initiative Name
- Scorecard Builder --> Initiatives --> Initiative Line Actions --> Edit
- Home page --> Featured Initiatives --> Initiative Line Actions --> Edit

STEPS

1. From the Menu bar, select **Scorecard Builder / Initiatives**.

Initiatives Page

The screenshot shows the 'Initiatives' page interface. At the top, there is a search bar and an 'Advanced Search' button. Below the search bar is an 'Actions' dropdown menu. The main content is a table with the following columns: Prefix, Name, Status, % Complete, and Assigned To. The table contains four rows of initiative data. The 'My project' row is highlighted in blue, and a context menu is open over it, showing options: Edit, Delete, Assign to Initiative, and Initiative Presentation View.

Prefix	Name	Status	% Complete	Assigned To	Actions
Corp	Portfolio Evaluation	On-Track	25%	Cheryl Mayberry	Actions
Corp	Root Cause Analysis on Late Shipments	On-Track	22%	B Aslani	Edit
Corp	Write letter to local environmental group	Not Started	0%	Paul Halvc	Delete
newpre	My project	On-Track	34%	None	Assign to Initiative
					Initiative Presentation View

2. On the Initiatives page, locate and select (click) the name of the Initiative to edit. This opens the Initiative record on the Edit Initiative page.

NOTE: Optionally, locate the line for the Initiative to edit, click the line Actions down arrow, and select Edit from the line Actions menu.

Edit Initiative, General Tabbed Page

The screenshot shows the 'Edit Initiative: Portfolio Evaluation' form. The 'General' tab is active, showing fields for Name (Portfolio Evaluation), Prefix (Corp), Status (On-Track), Color (Green), and Percent Complete (25.00). There are also dropdowns for Parent Initiative (None) and Status Update. A Description field contains the text: 'Identify under-performing assets for investment or divestiture; identify higher performing assets for learning and extending practices to other assets'. Below the form is a 'Measures This Initiative Affects' section with a 'Select' button and an 'Actions' dropdown. The actions table is as follows:

Prefix	Name	Actions
Corp	% of assets performing at or above corporate hurdle rate	Actions

3. The General tabbed page displays by default. Do any of the following to edit the Initiative record:
 - Change the fields on the **General** tabbed page as necessary.
 - Click the **Advanced, Tasks, Sub Initiatives, User Defined Fields, Associated Files** tabs to edit advanced fields. For detailed field descriptions, see Add a New Initiative.
 - Click the **Log** tab to view a list of actions performed, user names, and dates for modifications that have been made to the Initiative.
4. When you are finished editing the Initiative record, click **Save** to save the changes, close the Initiative record, and return to the Initiatives page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the Edit Initiative page name) to not save your changes, close the Initiative record, and return to the Initiatives page.

Maintain Tasks for an Initiative

Purpose

Use this procedure to add or remove tasks for an Initiative

NOTES

- Tasks must be created before they can be added to the Initiative.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Initiatives --> Add New Button --> Tasks Tab
- Scorecard Builder --> Initiatives --> Click on Initiative Name --> Tasks Tab
- Scorecard Builder --> Initiatives --> Initiative Line Actions --> Edit --> Tasks Tab
- Home page --> Featured Initiatives --> Initiative Line Actions --> Edit --> Tasks Tab
- Scorecard Builder --> Tasks --> Add New Button --> General Tab
- Scorecard Builder --> Tasks --> Click on Task Name --> General Tab
- Scorecard Builder --> Tasks --> Task Line Actions --> Edit --> General Tab
- Homepage --> Featured Initiatives --> Task Line Actions --> Edit --> General Tab

STEPS

1. From the Menu bar, select **Scorecard Builder / Initiatives**.

Initiatives Page

The screenshot shows the 'Initiatives' page interface. At the top left is a folder icon and the word 'Initiatives'. To the right are 'Print' and 'Add New' buttons. Below is a search bar with 'Search' and 'Advanced Search' options. An 'Actions' dropdown menu is visible. The main content is a table with the following data:

Prefix	Name	Status	% Complete	Assigned To	Actions
Corp	Portfolio Evaluation	On-Track	25%	Cheryl Mayberry	
Corp	Root Cause Analysis on Late Shipments	On-Track	22%	B Aslani	Edit, Delete, Assign to Initiative, Initiative Presentation View
Corp	Write letter to local environmental group	Not Started	0%	Paul Halvc	
newpre	My project	On-Track	34%	None	

2. On the Initiatives page, locate and select (click) the **Name** of the Initiative to maintain. This opens the Initiative record on the Edit Initiative page with the General tabbed page displayed.

NOTE: Optionally, locate the line for the Initiative to maintain, click the line Actions down arrow, and select Edit from the line Actions menu.

3. Click the **Tasks** tab.

Edit Initiative, Tasks Tabbed Page

Initiatives

Edit Initiative: Portfolio Evaluation

Print Save Cancel

General Advanced **Tasks (1)** Sub Initiatives (0) User Defined Fields Associated Files (0) Log

Tasks

Actions Select

<input type="checkbox"/>	Name	Status	% Complete	Assigned To	
<input type="checkbox"/>	Generate Report	Ahead of Schedule	33%	Demo User	Actions

4. Notice the following about the Tasks tab.
 - If no records are assigned in this section, a *No records to display* message appears on the first line.
 - Clicking any of the titles in the column heading sorts the list by that column, numerically then alphabetically (that is, by number and then letter).
 - The line for each Initiative and Initiative record contains, from left to right, a group Actions checkbox, the Name, the Status,% Complete, Assigned to, and a line Actions menu (appears only if the list shows records).
 - The section has a Select button (above the list on the right side). This button is for adding tasks to the Initiative.
 - a. In the Select Data dialog box, select the checkbox(es) for the Task record(s) to assign to the Initiative.
 - b. Click the **Select and Close** button.
5. Optionally, to remove a Task from the Initiative, do the following:
 - To remove one task, locate the line for the task to remove, click the line **Actions down arrow**, and select **Remove** from the line Actions menu.
 - To remove one or more tasks, select the group Actions checkbox for each task record to remove, click the group **Actions down arrow**, and select **Remove** from the group Actions menu.
6. When you are finished maintaining the Initiative record, click **Save** to save the changes, close the Initiative record, and return to the Initiatives page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the *Edit Initiative* page name) to not save your changes, close the Initiative record, and return to the Initiatives page.

Maintain Sub Initiatives for an Initiative

Purpose

Use this procedure to add or remove sub Initiatives for an Initiative

NOTES

- Sub Initiatives must be created before they can be added to the Initiative.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Initiatives --> Add New Button --> Sub Initiatives Tab
- Scorecard Builder --> Initiatives --> Click on Initiative Name --> Sub Initiatives Tab
- Scorecard Builder --> Initiatives --> Initiative Line Actions --> Edit --> Sub Initiatives Tab
- Home page --> Featured Initiatives --> Initiative Line Actions --> Edit --> Sub Initiatives Tab
- Scorecard Builder --> Initiatives --> Initiative Line Actions --> Assign to Initiative
- Scorecard Builder --> Initiatives --> Initiative Group Actions --> Assign to Initiative

STEPS

1. From the Menu bar, select **Scorecard Builder / Initiatives**.

Initiatives Page

The screenshot shows the 'Initiatives' page interface. At the top, there is a search bar and an 'Advanced Search' button. Below the search bar is an 'Actions' dropdown menu. The main content is a table with the following columns: Prefix, Name, Status, % Complete, and Assigned To. The table contains four rows of initiatives. The first row is 'Portfolio Evaluation' (On-Track, 25%, Cheryl Mayberry). The second row is 'Root Cause Analysis on Late Shipments' (On-Track, 22%, B Aslani). The third row is 'Write letter to local environmental group' (Not Started, 0%, Paul Halvc). The fourth row is 'My project' (On-Track, 34%, None). A context menu is open over the third row, showing options: Edit, Delete, Assign to Initiative, and Initiative Presentation View.

Prefix	Name	Status	% Complete	Assigned To
Corp	Portfolio Evaluation	On-Track	25%	Cheryl Mayberry
Corp	Root Cause Analysis on Late Shipments	On-Track	22%	B Aslani
Corp	Write letter to local environmental group	Not Started	0%	Paul Halvc
newpre	My project	On-Track	34%	None

2. On the Initiatives page, locate and select (click) the **Name** of the Initiative to maintain. This opens the Initiative record on the Edit Initiative page with the General tabbed page displayed.

NOTE: Optionally, locate the line for the Initiative to maintain, click the line Actions down arrow, and select Edit from the line Actions menu.

3. Click the **Sub Initiatives** tab.

Edit Initiative, Sub Initiatives Tabbed Page

Initiatives

Edit Initiative: Portfolio Evaluation

Print Save Cancel

General Advanced Tasks (0) Sub Initiatives (1) User Defined Fields Associated Files (0) Log

Sub Initiatives

Actions Select

Prefix	Name	Status	% Complete	Assigned To	Due Date	Actions
Corp	Root Cause Analysis on Late Shipments	On-Track	22%	B Aslani		Actions

4. Notice the following about the Sub Initiatives tab.
 - If no records are assigned in this section, a *No records to display* message appears on the first line.
 - Clicking any of the titles in the column heading sorts the list by that column, numerically then alphabetically (that is, by number and then letter).
 - The line for each Initiative and Initiative record contains, from left to right, a group Actions checkbox, the Name, the Status, % Complete, Assigned to, and a line Actions menu (appears only if the list shows records).
 - The section has a Select button (above the list on the right side). This button is for adding sub Initiatives to the Initiative.
 - a. In the Select Data dialog box, select the checkbox(es) for the Sub Initiative record(s) to assign to the Initiative.
 - b. Click the **Select and Close** button.
5. Optionally, to remove a Sub Initiative from the Initiative, do the following:
 - To remove one sub Initiative, locate the line for the sub Initiative to remove, click the line **Actions down arrow**, and select **Remove** from the line Actions menu.
 - To remove one or more Sub Initiatives, select the group Actions checkbox for each Sub Initiative record to remove, click the group **Actions down arrow**, and select **Remove** from the group Actions menu.
6. When you are finished maintaining the Initiative record, click **Save** to save the changes, close the Initiative record, and return to the Initiatives page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the Edit Initiative page name) to not save your changes, close the Initiative record, and return to the Initiatives page.

Maintain Measures that an Initiative Affects

Purpose

Use this procedure to add or remove the linkages of Measures that are affected by an Initiative.

NOTES

- Measures must be added before they can be linked.
- To view what Initiatives affect a Measure view the Measure at a Glance Screen for the appropriate Measure.

Alternative Ways to Access this Procedure

- Scorecard Builder --> Initiatives --> Add New Button --> General Tab
- Scorecard Builder --> Initiatives --> Click on Initiative Name --> General Tab
- Scorecard Builder --> Initiatives --> Initiative Line Actions --> Edit --> General Tab
- Home page --> Featured Initiatives --> Initiative Line Actions --> Edit --> General Tab

STEPS

1. From the Menu bar, select **Scorecard Builder / Initiatives**.

Initiatives Page

The screenshot shows the 'Initiatives' page interface. At the top, there is a search bar and an 'Advanced Search' button. Below that is a table of initiatives. The table has columns for 'Prefix', 'Name', 'Status', '% Complete', and 'Assigned To'. The 'My project' row is highlighted, and its 'Actions' dropdown menu is open, showing options: 'Edit', 'Delete', 'Assign to Initiative', and 'Initiative Presentation View'.

Prefix	Name	Status	% Complete	Assigned To
Corp	Portfolio Evaluation	On-Track	25%	Cheryl Mayberry
Corp	Root Cause Analysis on Late Shipments	On-Track	22%	B Aslani
Corp	Write letter to local environmental group	Not Started	0%	Paul Halvc
newpre	My project	On-Track	34%	None

2. On the Initiatives page, locate and select (click) the **Name** of the Initiative to maintain. This opens the Initiative record on the Edit Initiative page with the General tabbed page displayed.

NOTE: Optionally, locate the line for the Initiative to maintain, click the line Actions down arrow, and select Edit from the line Actions menu.

Edit Initiative, General Tabbed Page

Initiatives

Edit Initiative: Portfolio Evaluation

Print Save Cancel

General Advanced Tasks (0) Sub Initiatives (0) User Defined Fields Associated Files (0) Log

Name*
Portfolio Evaluation

Prefix
Corp

Status
On-Track

Color
Green

Percent Complete
25.00

Parent Initiative
None

Status Update

Description
Identify under-performing assets for investment or divestiture; identify higher performing assets for learning and extending practices to other assets

Measures This Initiative Affects Select

Actions

Prefix	Name	Actions
Corp	% of assets performing at or above corporate hurdle rate	Actions

- Notice the following about the **Measures this Initiative Affects** section of the General tab.
 - If no records are assigned in the section, a *No records to display* message appears on the first line.
 - Clicking any of the titles in the column heading sorts the list by that column, numerically then alphabetically (that is, by number and then letter).
 - The line for each Measure record contains, from left to right, the Prefix, the Name, and a line Actions menu (appears only if the list shows records).

Select Measures Dialog Box

Select Measure(s)

search Advanced Search

Prefix	Name	Time Period Type	ID
Corp	Gross Margin %	Fiscal Month	97
Corp	Margin CAGR	Fiscal Month	98
Corp	% Earnings committed to community development	Fiscal Year	117

Page size: 20 67 items in 4 pages

Select and Close Cancel

- In the Select Data dialog box, select the checkbox(es) for the Measure record(s) to assign to the Initiative.
- Click the **Select and Close** button.

4. Optionally, to remove an Associated Measure from the Initiative, do the following:
 - To remove one associated Measure, locate the line for the Measure to remove, click the line **Actions down arrow**, and select **Remove** from the line Actions menu.
 - To remove one or more associated Measure(s), select the group Actions checkbox for each Measure record to remove, click the group **Actions down arrow**, and select **Remove** from the group Actions menu.
5. When you are finished maintaining the Initiative record, click **Save** to save the changes, close the Initiative record, and return to the Initiatives page.

NOTE: *Optionally, click **Cancel** or the **back to list** link (above the *Edit Initiative* page name) to not save your changes, close the Initiative record, and return to the Initiatives page.*

Delete an Initiative

Purpose

Use this procedure to delete one or more Initiative records.

NOTES

- When deleting an Initiative record, all *linkages* to and from other items such as Measures are deleted. However, the linked items themselves are not deleted.
- All User Defined Fields information will be deleted with the Initiative

STEPS

1. From the Menu bar, select **Scorecard Builder / Initiatives**.

Initiatives Page

The screenshot shows the 'Initiatives' page interface. At the top, there is a search bar and an 'Advanced Search' button. Below the search bar is an 'Actions' dropdown menu. The main content is a table with the following data:

Prefix	Name	Status	% Complete	Assigned To	Actions
Corp	Portfolio Evaluation	On-Track	25%	Cheryl Mayberry	Actions
Corp	Root Cause Analysis on Late Shipments	On-Track	22%	B Aslani	Edit, Delete
Corp	Write letter to local environmental group	Not Started	0%	Paul Halvc	Assign to Initiative
newpre	My project	On-Track	34%	None	Initiative Presentation View

2. Do either of the following:
 - To delete one Initiative, locate the line for the Initiative record to delete, click the line **Actions down arrow**, and select **Delete** from the line Actions menu.
 - To delete one or more Initiatives, select the group Actions checkbox for each Initiative record to delete, click the group **Actions down arrow**, and select **Delete** from the group Actions menu.
3. A message appears to confirm the Initiative deletion. Click **OK** to delete the Initiative(s) or click **Cancel** to not delete the Initiative(s)
4. One or more other messages may appear. If so, for each message, click **OK** or **Cancel** as appropriate.

NOTES:

Chapter 8: Tasks

Overview

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.” This chapter includes the following sections for adding and maintaining Task records in the InsightVision application.

- [View the Tasks List](#) (below)
- [Add a New Task](#) on page 82
- [Edit a Task](#) on page 85
- [Delete a Task](#) on page 86

View the Tasks List

Purpose

Use this procedure to view the Tasks page, which lists the Tasks records in the InsightVision application.

STEPS

1. From the Menu bar, select **Scorecard Builder / Tasks**.

Tasks Page



2. Notice the following about the Tasks page:

- The Task list has a column heading line and contains one line for each Task record. The list is empty if no Tasks have been added.
- Clicking the word Name in the column heading sorts the records alphabetically.
- The line for each Task record contains, from left to right, a group Actions checkbox, the Initiative name, the Task Name, and a line Actions menu (all described below).
 - » The group Actions checkbox is for selecting one or more records and applying a group Actions menu command, described below.
 - » The Initiative name column shows which Initiative the Task record is associated to.
 - » Each Task name is a link that opens the Task record. Clicking a Task name opens the record on the Edit Task page. See [Edit a Task](#) on page 85.
 - » The line Actions menu provides access to functions related to Task records, such as edit, copy, and add.
- The group Actions menu, above the list of records (on the left side), is for applying commands to one or more Tasks selected by using the group Actions checkboxes.
- The **Print** and **Add New** commands, at the top right corner of the page, are for printing and adding new Tasks.

Add a New Task

Purpose

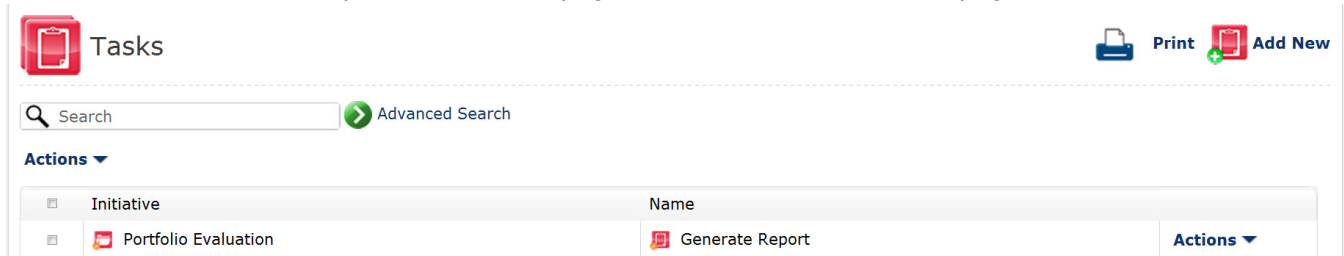
Use this procedure to add a new Task record.

STEPS

1. From the Menu bar, select **Scorecard Builder / Tasks**.

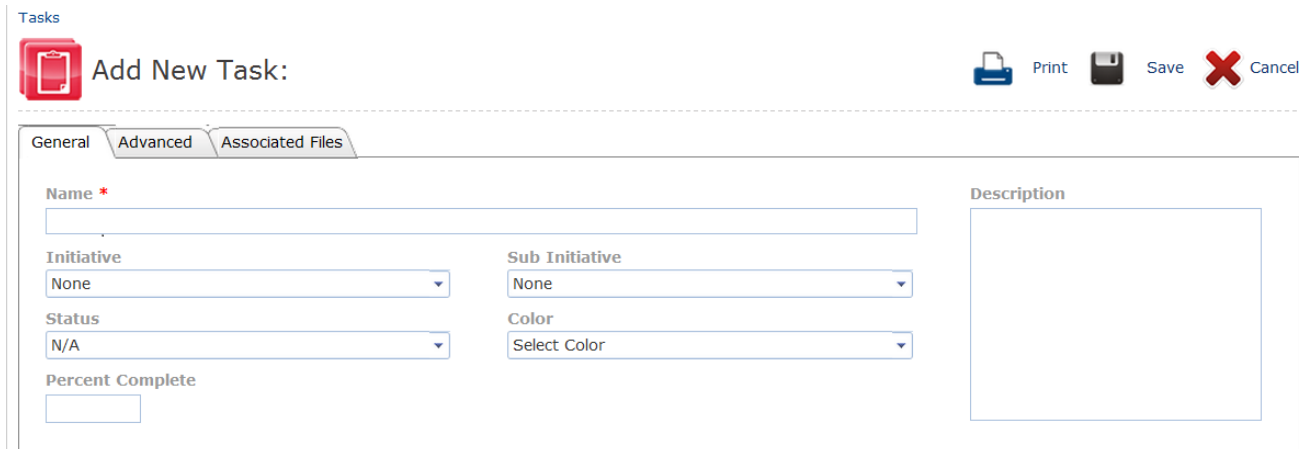
Tasks Page

NOTE: For a detailed description of the Tasks page, see [View the Tasks List](#) on page 81



2. On the Tasks page, click **Add New**.

Add New Task, General Tabbed Page







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

Name*	Type up to 65 characters for the name of the Task.
Description	Type a description of the Task. This field displays on the Task presentation view.
Initiative	Select the Initiative this Task is for.
Sub Initiative	Select the sub Initiative this Task is for.
Status	Select the current status of this Task.
Color	Select the color that will display behind the Task status. This gives users a quick reference as to the status of the Task.
Percent Complete	Enter the percentage complete the Task is. Values should be between 0 and 100.

4. Click the **Advanced** tab.


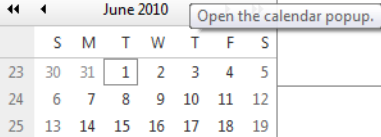
Add New Task, Advanced Tabbed Page

Back to List

 Add New Task: Prepare for Training Weekend  Print  Save  Cancel

General **Advanced** Associated Files

Assigned To:

Start Date: 
 Open the calendar popup.

Assigned By:

Charter Document Link:

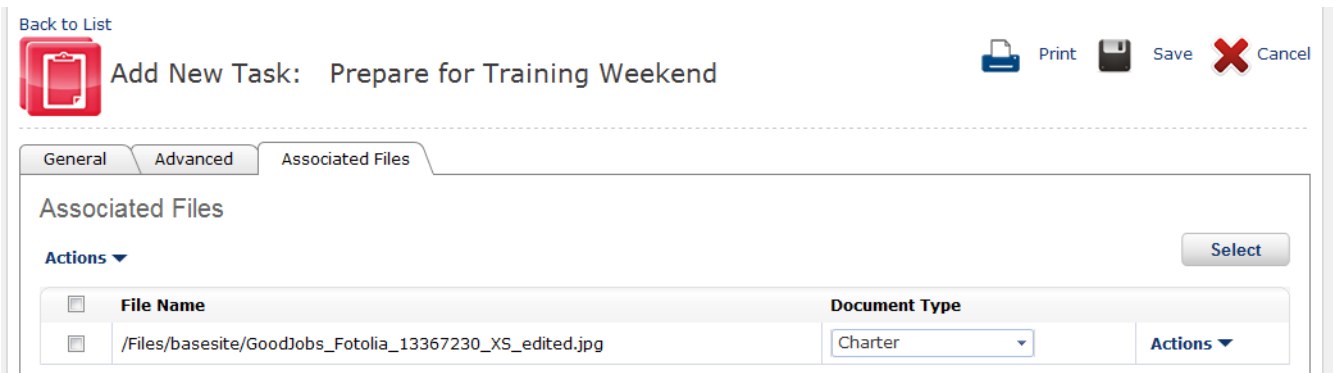
PM Task Number:

5. Complete the following fields on the Advanced tabbed page:

Assigned To	Select a user to assign the Task to.
Assigned By	Select the user who assigned this Task to the assignee. (Default is the logged in user)
Start Date	Click on the calendar icon to select the Task start date
End Date	Click on the calendar icon to select the Task end date
Charter Document Link	To link a document to this Task, click the Browse button and then select the document from the File Manager dialog box that appears. For example, link a document that describes the purpose or background of this Task. NOTE: The document link appears on the Program Presentation View.
PM Task Number	The PM Task Number is for entering Task numbers based on external Initiative management numbering systems.

6. Click the **Associated Files** tab.

Add New Task, Associated Files Tabbed Page



7. Attach files to this Task by using the select button
8. Once files have been attached, use the document type column to indicate the type of document
NOTE: Optionally, use the line or group Actions to remove documents from the Task.
9. Click **Save** to save and close the new Task record and to return to the Tasks page.
NOTE: Optionally, click **Cancel** or the **back to list** link (above the Add Task page name) to not save your changes, close the Task record, and return to the Tasks page.
10. On the Tasks page, notice the new Task appears in the list of Task records.

Edit a Task

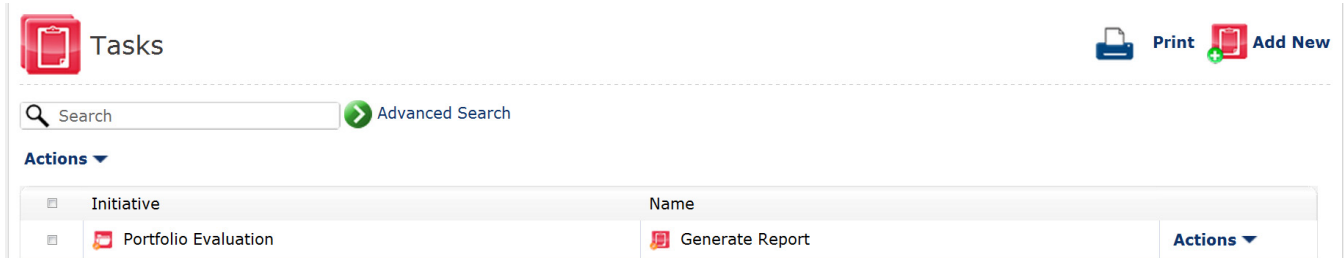
Purpose

After adding a Task record, you can change the Task properties. Use this procedure to change (edit) a Task record.

STEPS

1. From the Menu bar, select **Scorecard Builder / Tasks**.

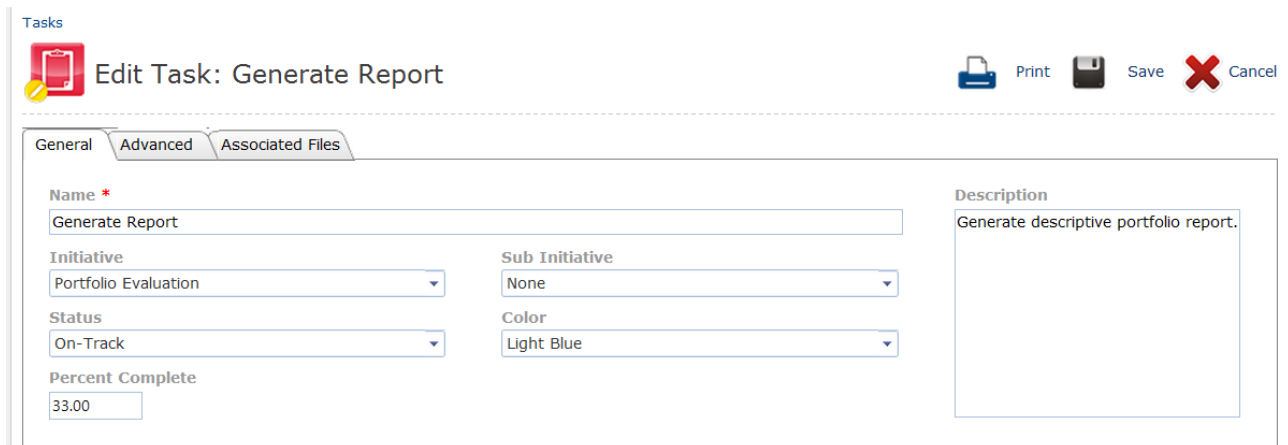
Tasks Page



2. On the Tasks page, locate and select (click) the name of the Task to edit. This opens the Task record on the Edit Task page.

NOTE: Optionally, locate the line for the Task to edit, click the line Actions down arrow, and select Edit from the line Actions menu.

Edit Task, General Tabbed Page



3. The General tabbed page displays by default. Do any of the following to edit the Task record:
 - Change the fields on the **General** tabbed page as necessary.
 - Click the **Advanced and Associated Files** tabs to edit advanced fields. For detailed field descriptions, see Add a New Task.
 - Click the **Log** tab to view a list of actions performed, user names, and dates for modifications that have been made to the Task.
4. When you are finished editing the Task record, click **Save** to save the changes, close the Task record, and return to the Tasks page.

NOTE: Optionally, click **Cancel** or the **back to list** link (above the Edit Task page name) to not save your changes, close the Task record, and return to the Tasks page.

Delete a Task

Purpose

Use this procedure to delete one or more Task records.

NOTES

- When deleting a Task record, all *linkages* to and from other items such as measures are deleted. However, the linked items themselves are not deleted.

STEPS

1. From the Menu bar, select **Scorecard Builder / Tasks**.

Tasks Page

Initiative	Name	
<input type="checkbox"/> Portfolio Evaluation	<input type="checkbox"/> Generate Report	Actions ▾

2. Do either of the following:
 - To delete one Task, locate the line for the Task record to delete, click the line **Actions down arrow**, and select **Delete** from the line Actions menu.
 - To delete one or more Tasks, select the group Actions checkbox for each Task record to delete, click the group **Actions down arrow**, and select **Delete** from the group Actions menu.
3. A message appears to confirm the Task deletion. Click **OK** to delete the Task(s) or click **Cancel** to not delete the Task(s)
4. One or more other messages may appear. If so, for each message, click **OK** or **Cancel** as appropriate.

NOTES:



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