Spider Strategies

Getting Started in Spider Impact™

Spider Impact 4.0 Quick Start Guide
Updated February 7th, 2021

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Your success is important to us!

Spider Impact is industry-leading performance management software that powers data visualization, balanced scorecards, team alignment, and KPI and initiative management. This comprehensive guide explains how to use the software, including some of the more advanced functionality.

Although we're providing this information here as a single user guide, it's much better when referenced online. You can see every cross-referenced article in its most up-to-date form at support.spiderstrategies.com .

To help you discover everything Spider Impact has to offer, we also have free training videos on our website, and we've put together several "what is" guides to explain some of the more popular performance management methodologies. We even host free monthly webinars to walk you through new features and best practices.

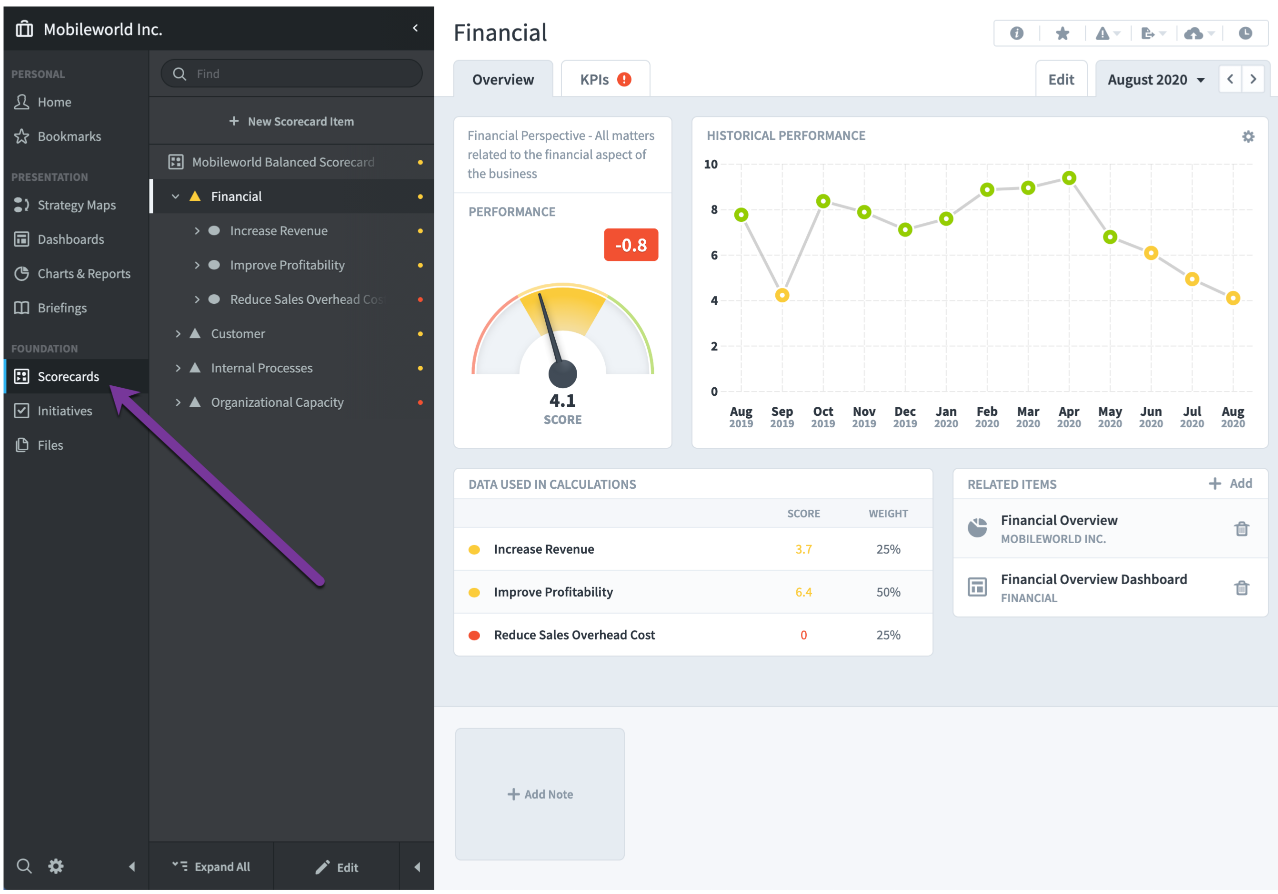
If you want to maximize your return on investment, we offer paid formal training courses and dedicated consulting engagements. Most of our customers prefer the flexibility of contracting for remote (web-based) assistance, but we also have on-site services available if they're a better match for your requirements.

Scorecards

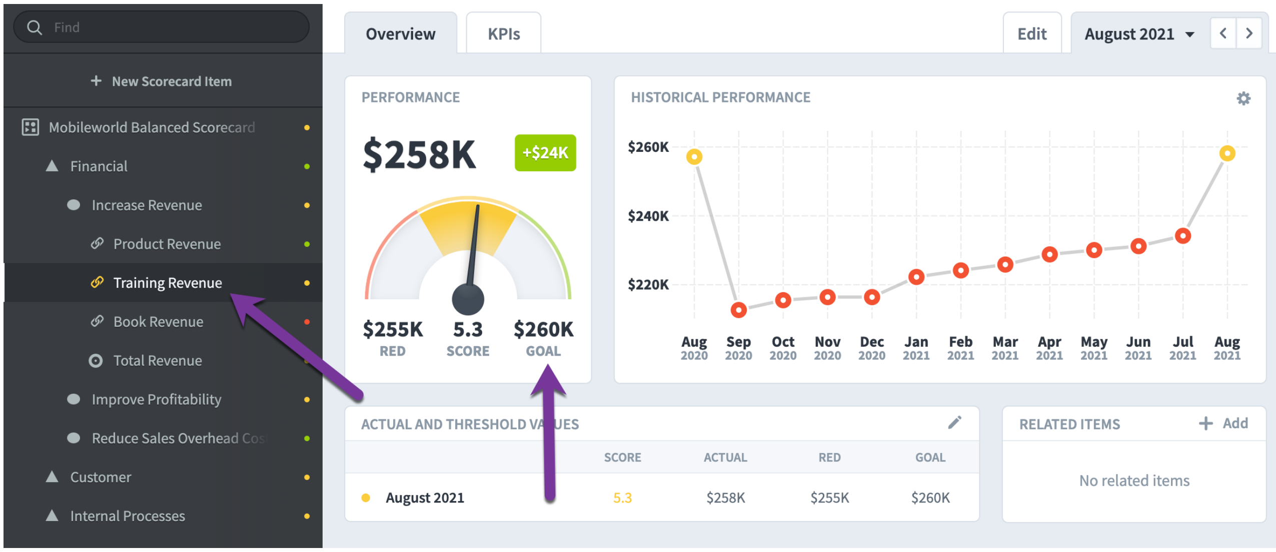
Overview of Scorecards

The Scorecard Tree

The Scorecards section is the heart of Spider Impact. It's where you keep all of your performance metrics, as well as where you manage your overall strategy as an organization.



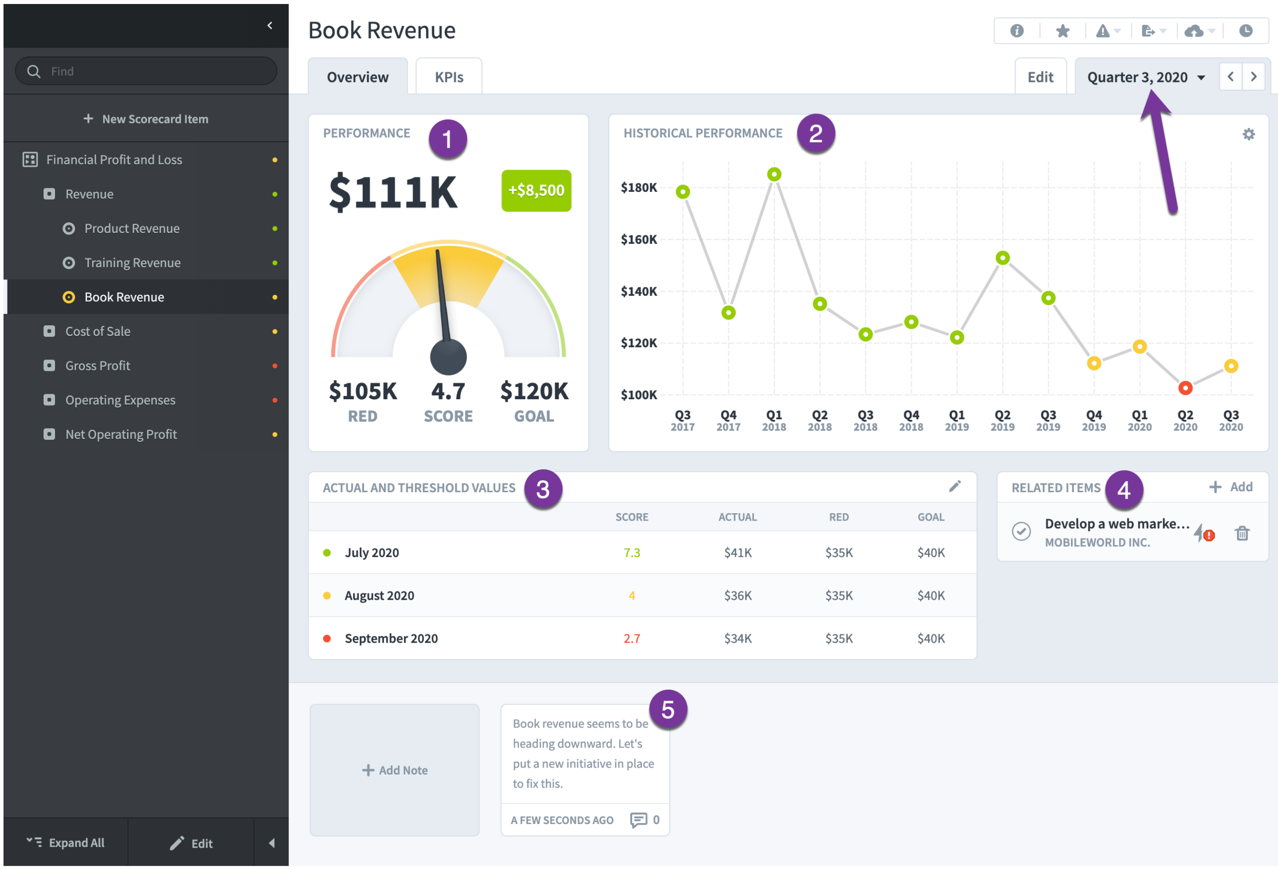
The idea behind Scorecards is simple. At the bottom of your scorecard tree are KPIs. *(If you're using the balanced scorecard language, they're called measures, but it's just a different name for the same thing.)* Each KPI has a goal, and every month the KPI's actual value is compared against the goal to give it a score and a color.



All of those KPI scores are then rolled up the tree to give scores to your higher-level strategic scorecard items. In this example, the score from this *Training Revenue* KPI is combined with other similar KPI scores to give the *Increase Revenue* objective a score. That objective score is then rolled up with other objectives into the overall *Financial* perspective's score.

Overview Tab

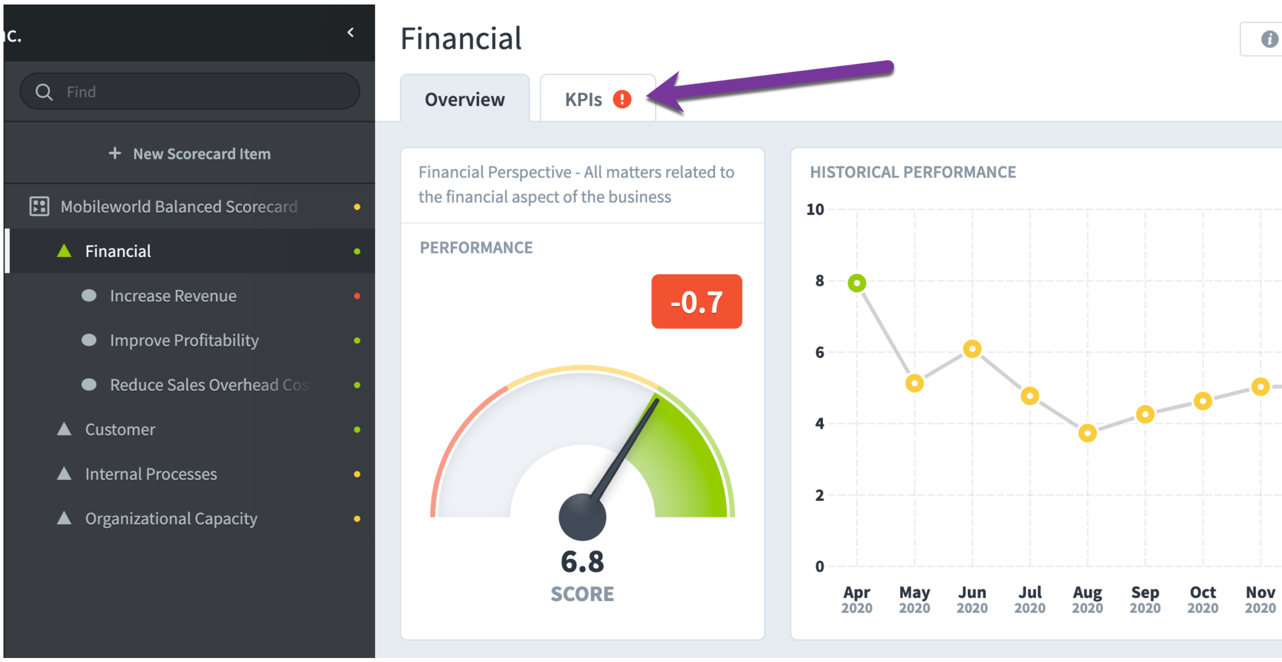
The Scorecards overview tab shows all of the information about a scorecard item and how it's performing. As you click around the scorecard tree on the left, the information for the selected item is shown on the right.



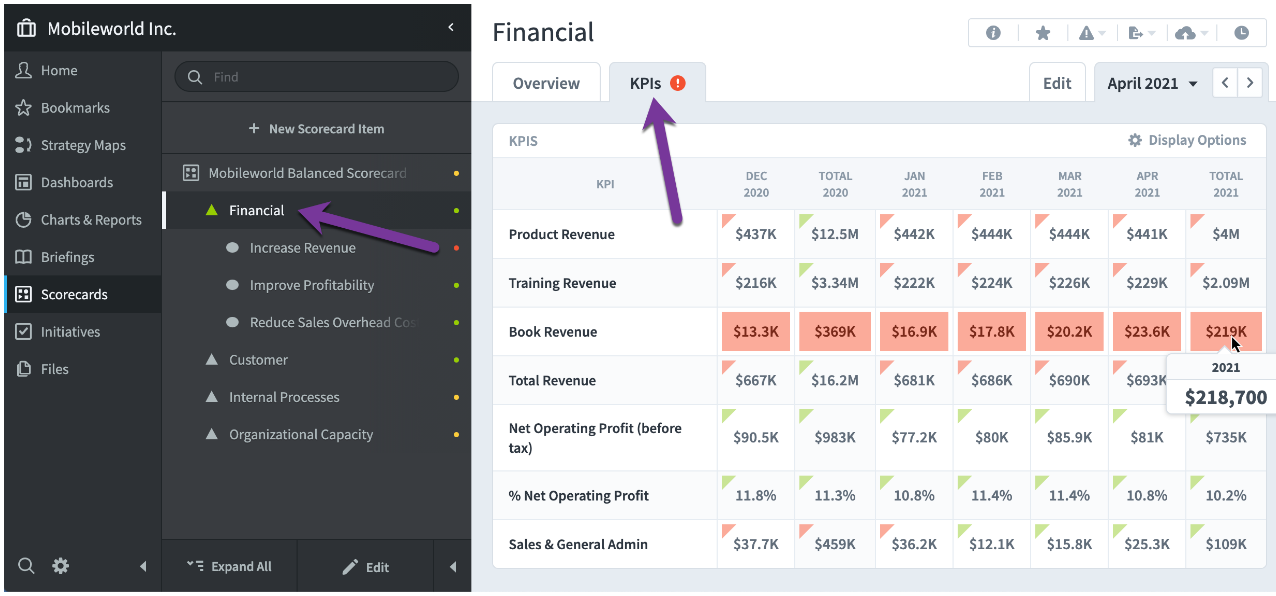
1. The speedometer shows the performance for the current calendar period (purple arrow). In this example we're looking at a KPI and we can see its actual value, goal, and how much it has changed since the previous period.
2. The historical performance chart shows how this KPI has changed over time. You can hover/tap on the chart to see the specific values.
3. The actual and threshold values table includes everything that goes into the score calculation. In this example we're looking at a monthly KPI in quarterly mode (purple arrow), so we see three months' worth of data in the table.
4. You can designate just about anything in Spider Impact as a related item. For example, you may want to link to a supporting document in the Files section. If you choose an Initiative as a related item, Spider Impact will tell you if the initiative appears to be affecting this scorecard item's performance.
5. You can create notes for scorecard items that can apply either to specific periods, or to the scorecard item in general.

KPIs (or Measures) Tab

When you're viewing a high-level strategic scorecard item, you'll sometimes see a red icon on the KPIs tab. *(This tab is called Measures when you're using balanced scorecard language.)* This means that there's a red KPI somewhere under this scorecard item.



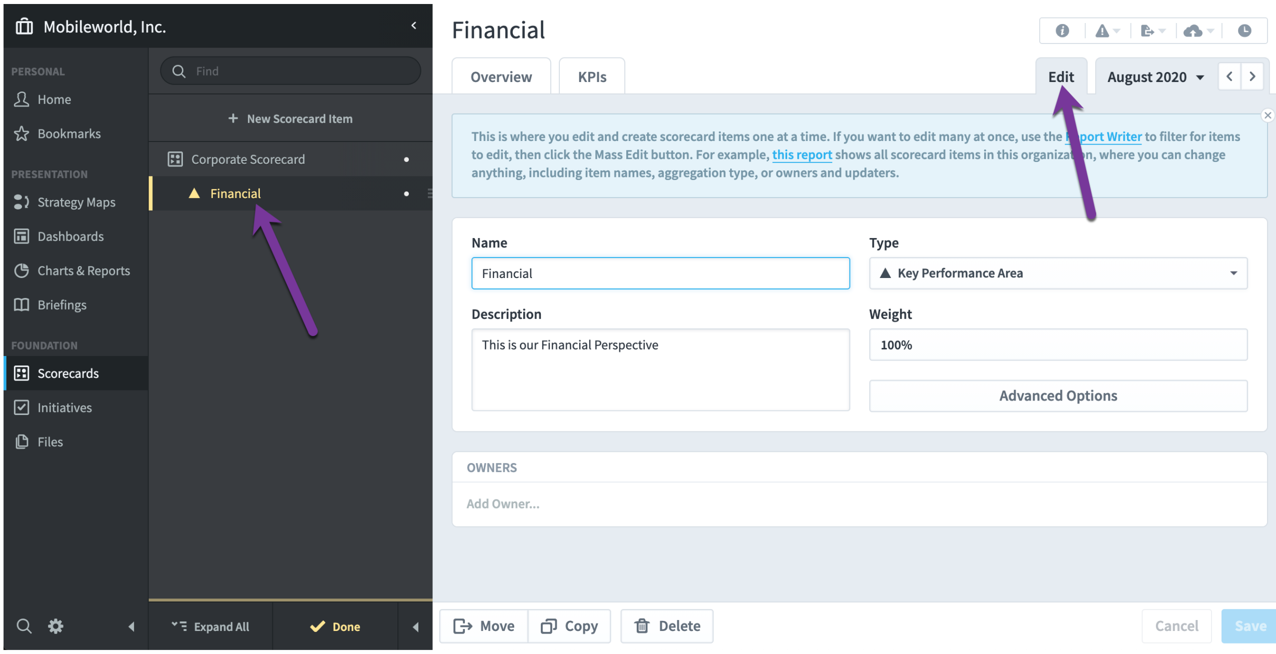
If you click on the KPIs tab, you'll see the performance of every KPI that is underneath the currently selected item. This is a great way to see all of the low-level data that's behind a high-level strategic item.


Mobileworld Inc.
Home
Bookmarks
Strategy Maps
Dashboards
Charts & Reports
Briefings
Scorecards
Initiatives
Files
Find
New Scorecard Item
Mobileworld Balanced Scorecard
Financial
Increase Revenue
Improve Profitability
Reduce Sales Overhead Cos
Customer
Internal Processes
Organizational Capacity
Expand All
Edit
Financial
Overview
KPIs
Edit
April 2021
KPIS
Display Options
KPI
DEC 2020
TOTAL 2020
JAN 2021
FEB 2021
MAR 2021
APR 2021
TOTAL 2021
Product Revenue
Training Revenue
Book Revenue
Total Revenue
Net Operating Profit (before tax)
% Net Operating Profit
Sales & General Admin
2021
$218,700

Scorecard Building Basics

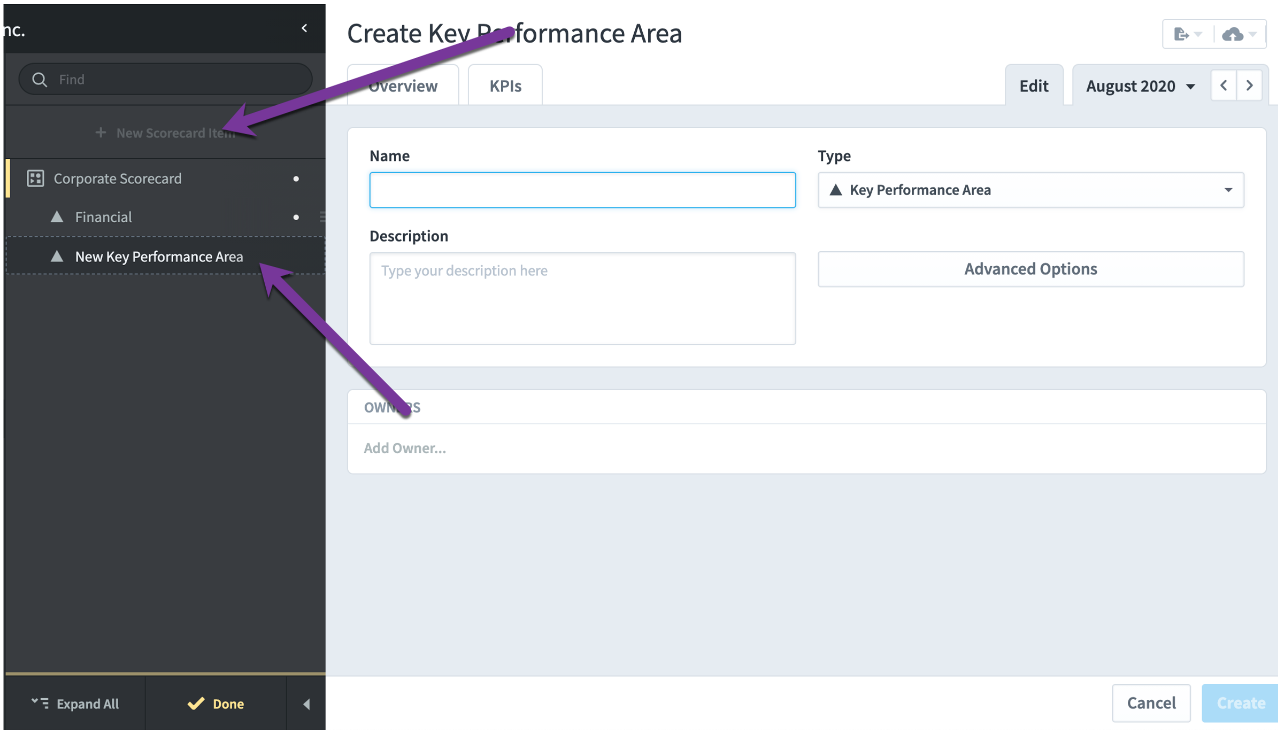
Editing Scorecard Items

To edit an existing scorecard item, just select it in the tree on the left and then go to its Edit tab.

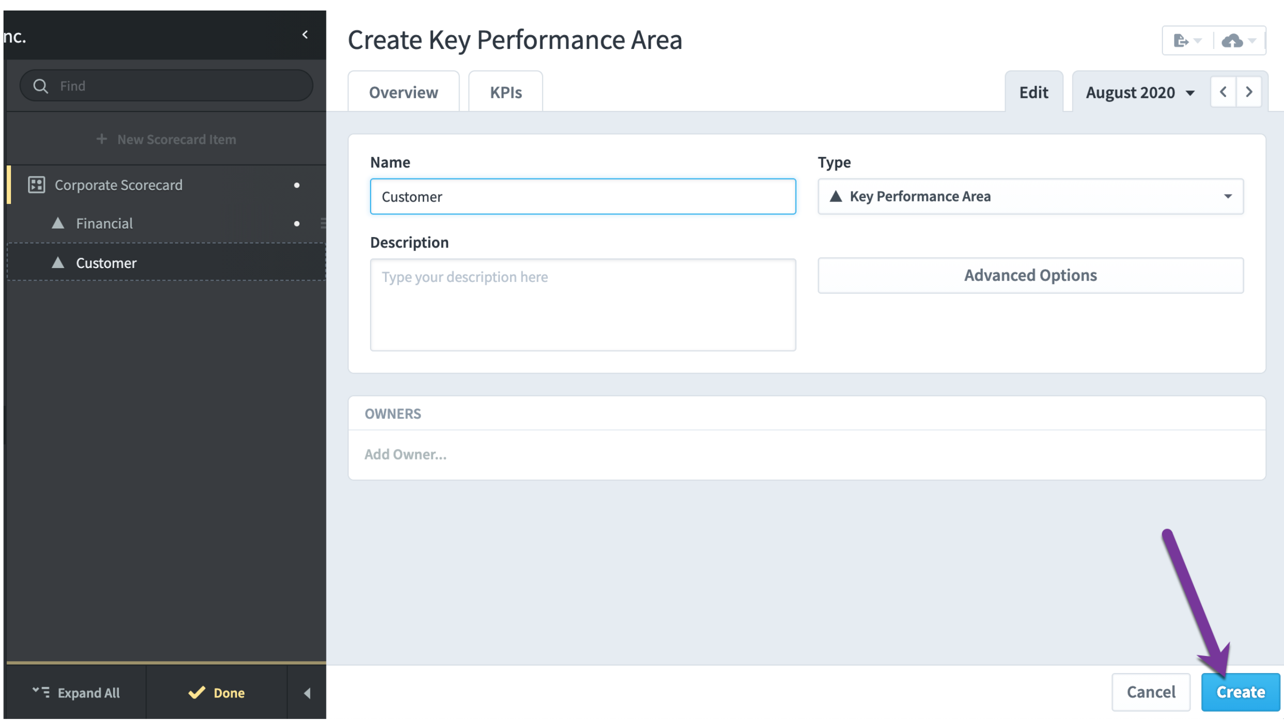


Creating New Scorecard Items

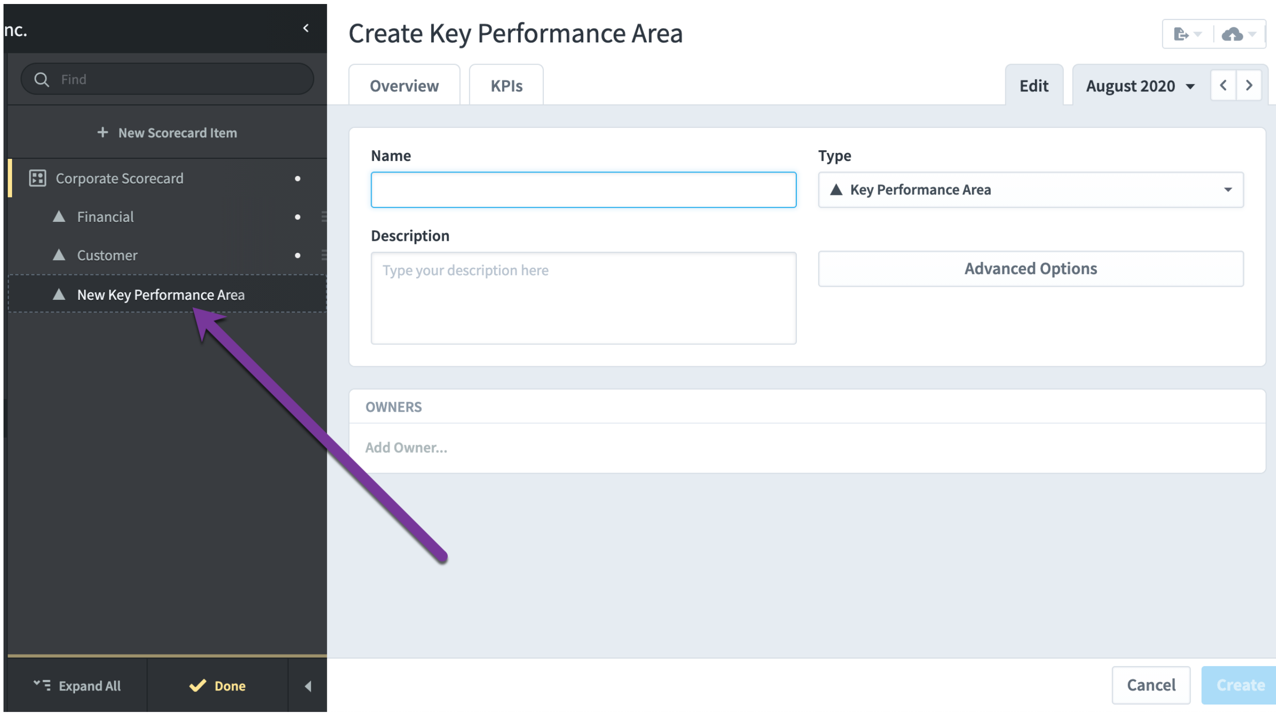
To create a new scorecard item, select its parent in the tree and click the New Scorecard Item button. This will put a placeholder for the new item in the tree and you can start filling out the form.



Once your scorecard item is ready to go, click the Create button (or type the return/enter key on your keyboard).



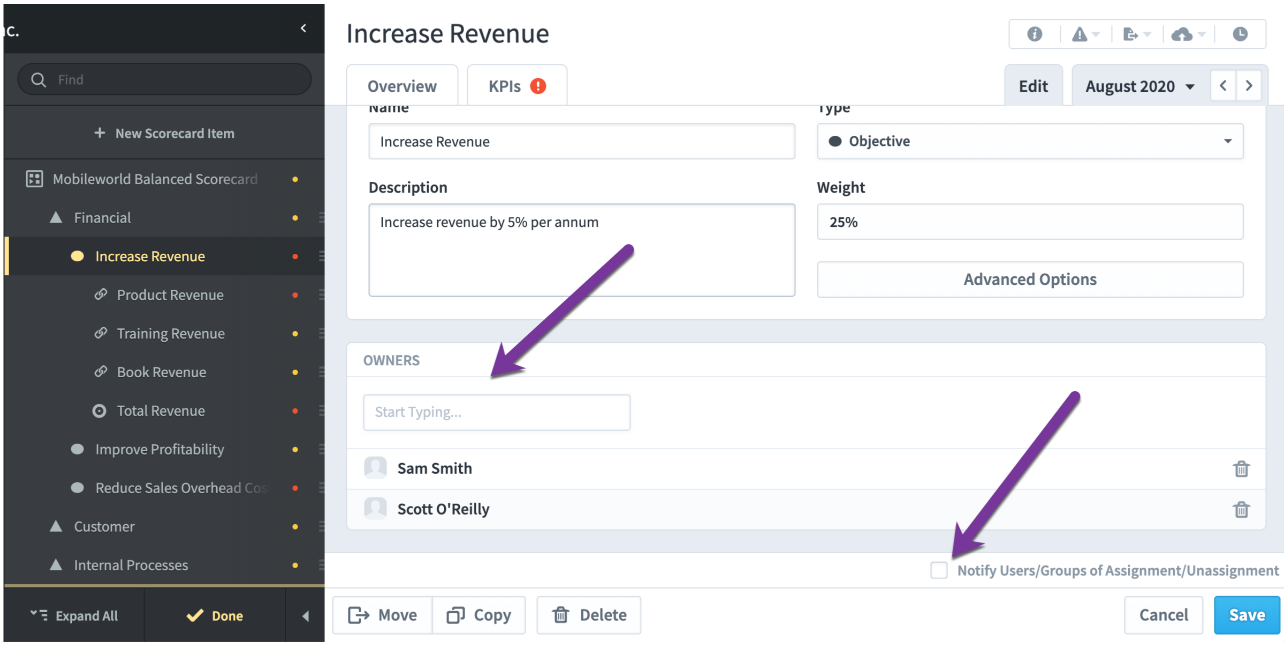
Not only does this save your scorecard item, but it also automatically moves on to creating the next scorecard item in the list.



With a little practice you can quickly create all of your scorecard item siblings this way at once. Just type the scorecard item's name, hit enter on your keyboard, and then start typing the next item's name. You can also hit tab to jump to another field like Description.

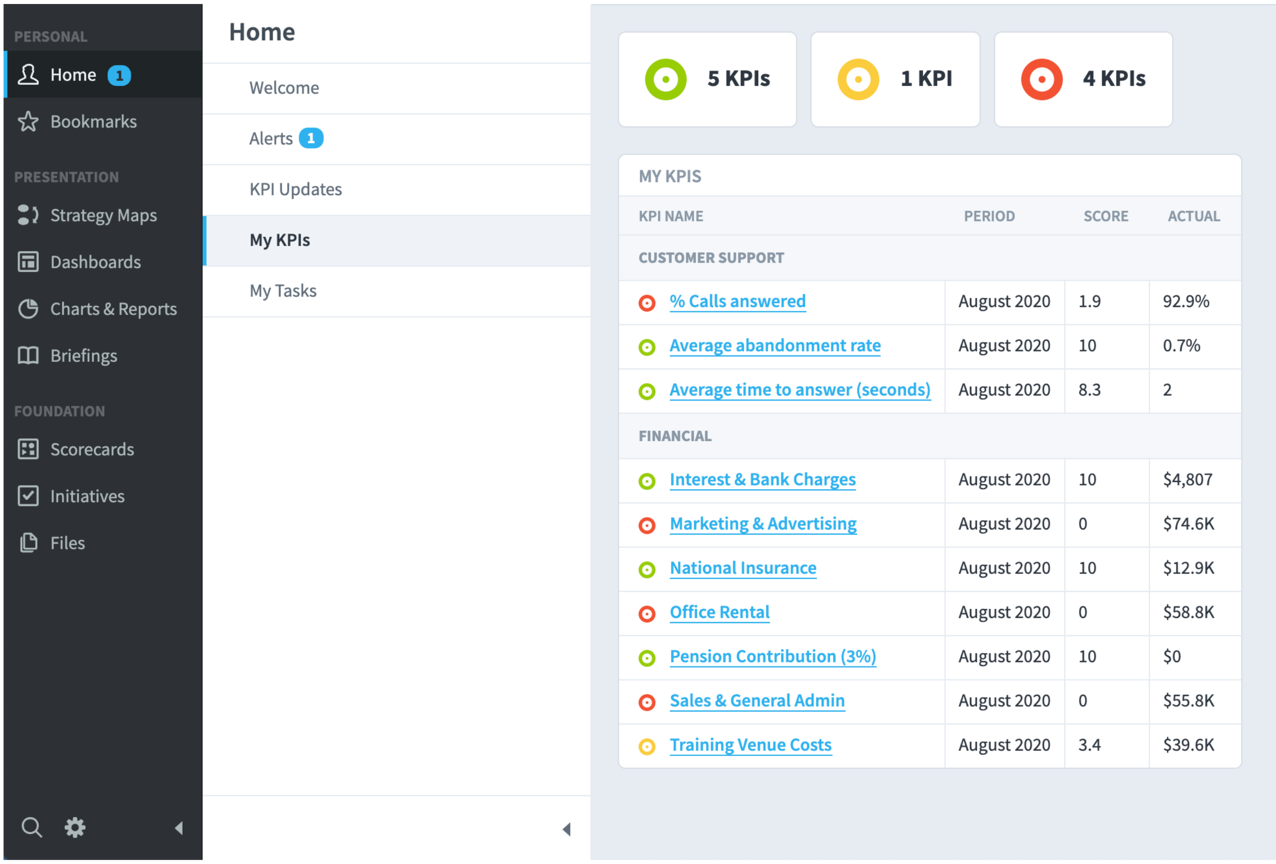
Assigning Owners

You can assign users or groups a an Owners of any scorecard item and optionally send them an alert when they've been assigned.



Accountability is incredibly important to managing your organization's strategy. By clearly stating who is responsible for a KPI, there will be a point of contact if performance starts to take a turn for the worse.

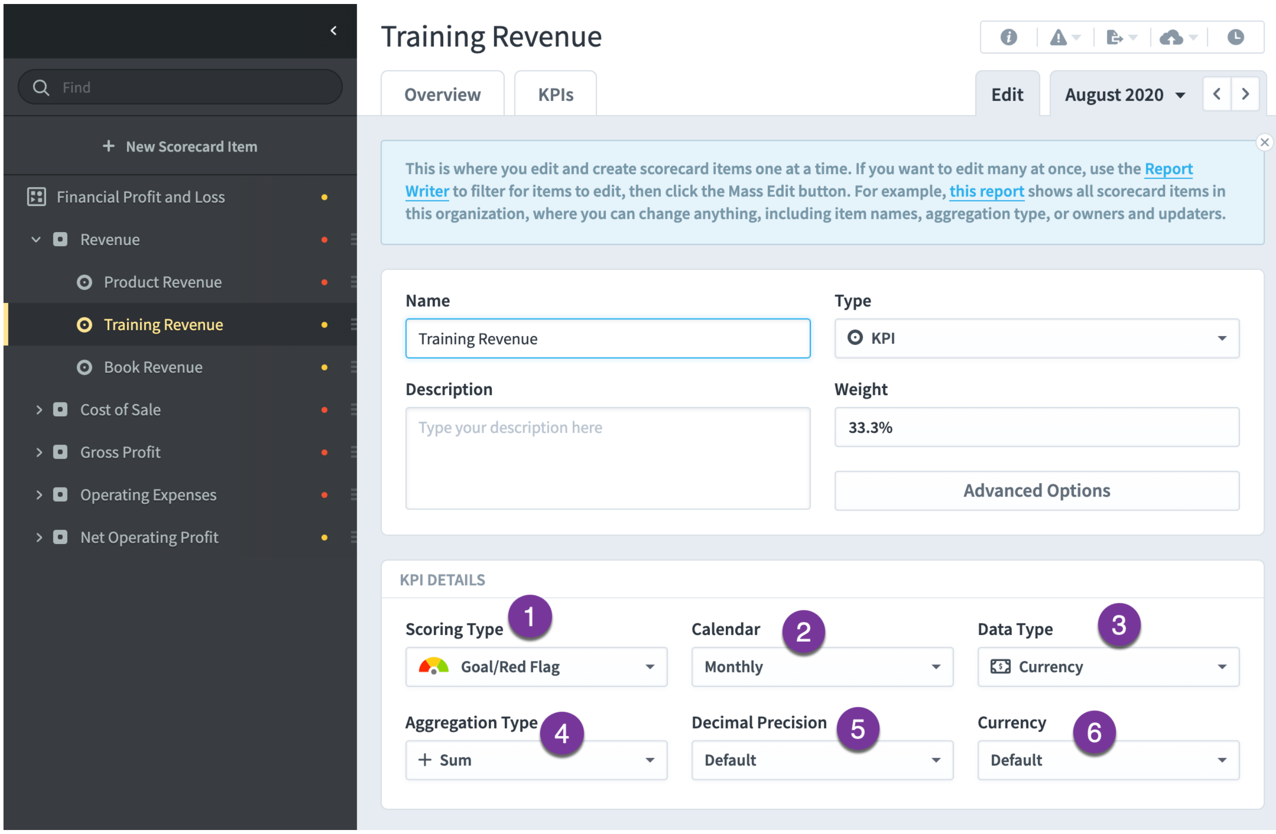
It's also helpful for the owners because they'll know exactly what they're responsible for. They're able to see a list of all KPIs they own in the Home section.



KPI (or metric) Details

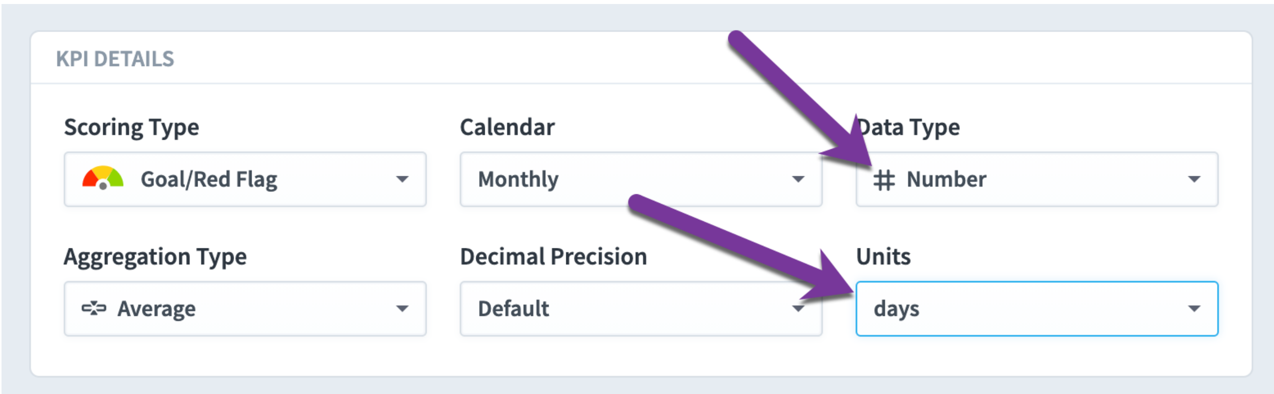
KPIs *(or metrics if you're using balanced scorecard language)* are a little more complicated than other types of scorecard items. The good news is that all of the default KPI settings work wonderfully. Most of the time you can just give your KPI a name, an owner, and a couple threshold values. If you really want to customize your KPIs, though, Spider Impact has the tools to do it.

First, let's review all of the KPI details.



1. **Scoring Type** is how your KPI gets its score. The default *Goal/Red Flag* option is the most popular by far. You choose a number where your KPI turns green, and a number where your KPI value turns red. Please see our KPI Scoring Types article for more information.
2. **Calendar** is how often you update your KPI.
3. **Data Type** is the kind of number you want to use. You can choose *Number*, *Percentage*, or *Currency*.
4. **Aggregation Type** is how to combine KPI data for multiple periods. For example, a monthly KPI's quarterly totals. Most KPIs are *Sum* or *Average*, but there are also options for *Geometric Mean* and *Last Value (already aggregated)*.
5. **Decimal Precision** is how many numbers you want to the right of the decimal point. You can also set the default decimal precision for Spider Impact in the Application Administration section.
6. **Currency** allows you to choose a specific country's currency and is only an option when configured in the Application Administration section.

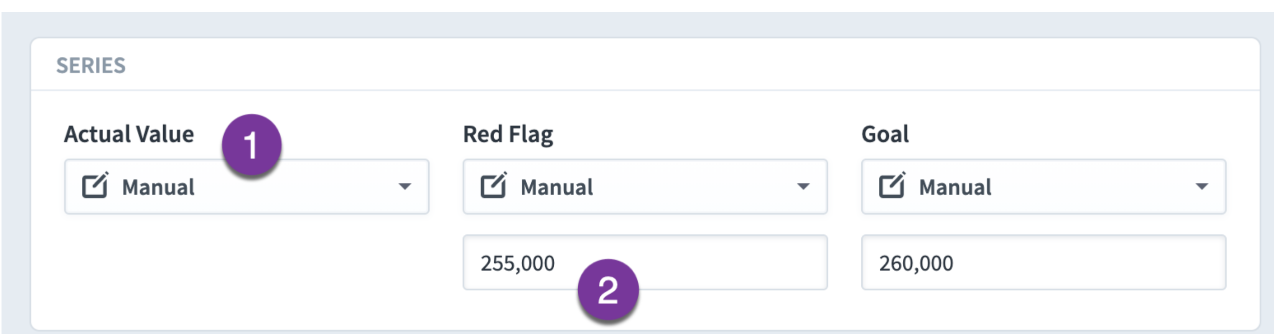
When you choose *Number* for the data type, you also have the ability to specify a unit of measurement if you've configured *Units* in the Application Administration section.



KPI Series

Every KPI has actual values that are updated regularly. Depending on the KPI's scoring type, it may also have one or more scoring thresholds that can change month to month.

In this example we're using *Goal/Red Flag* scoring and we have three series to configure:

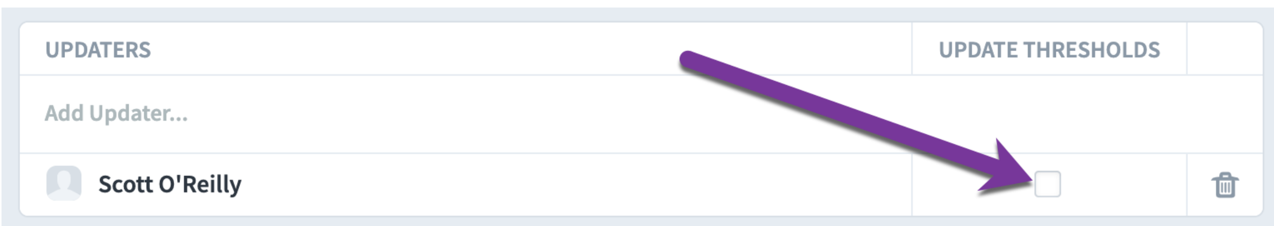


1. Every series has an update type. It defaults to manual, but you can also choose Calculated or Template Rollup. Please see the Calculated KPIs article for more information.

2. Every manual threshold has a default threshold value. In this example our KPI will turn red if the value us lower than 255,000 and green if it's higher than 260,000. When higher values are worse, the Goal threshold is going to have a lower number than the Red Flag threshold.

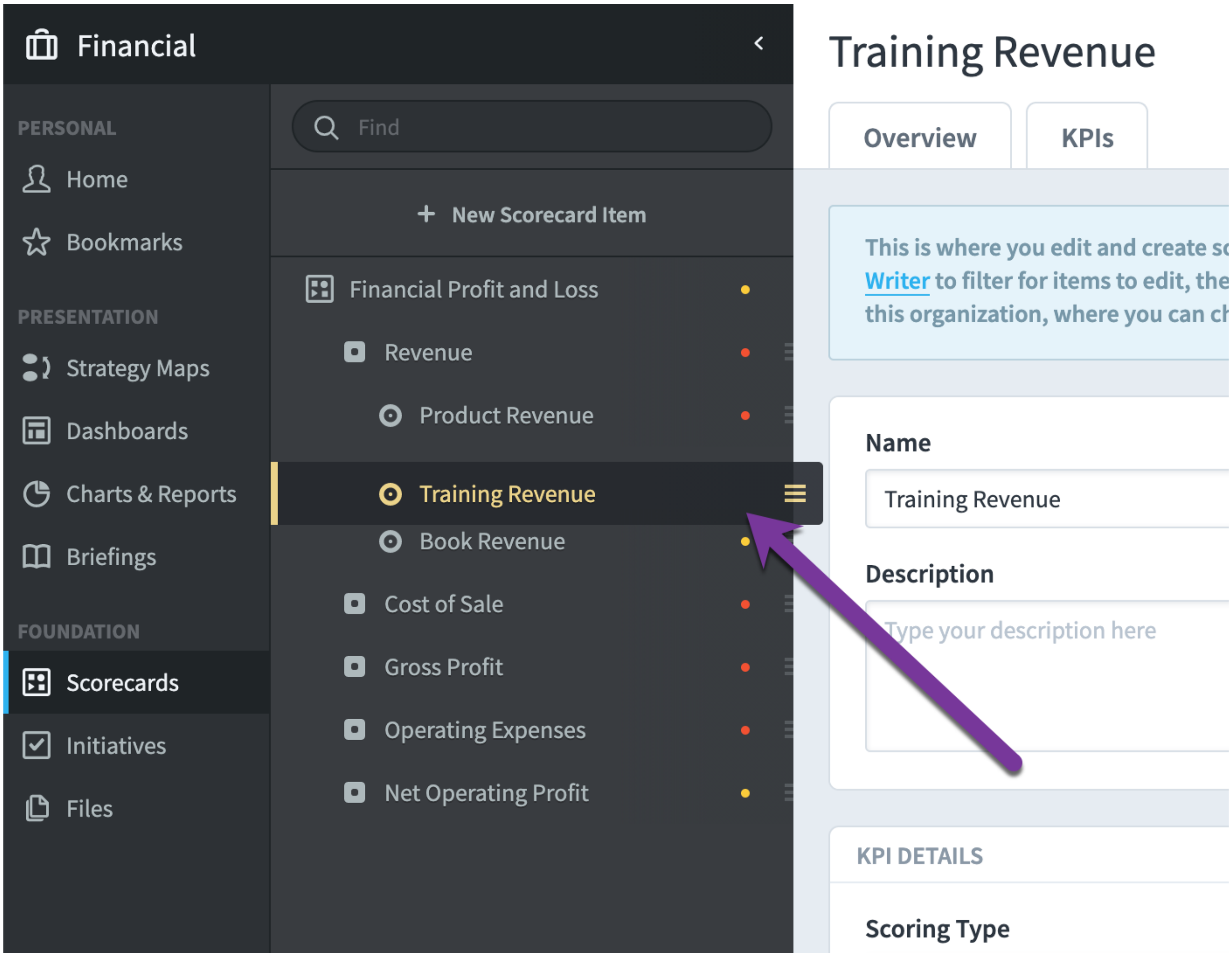
KPI Updaters

The last thing you can configure for KPIs is *Updaters*. Here you can designate one or more users or groups as updaters for the KPI. By clicking the *Update Thresholds* checkbox you can also give them the ability to change things like the KPI's goals for each period.



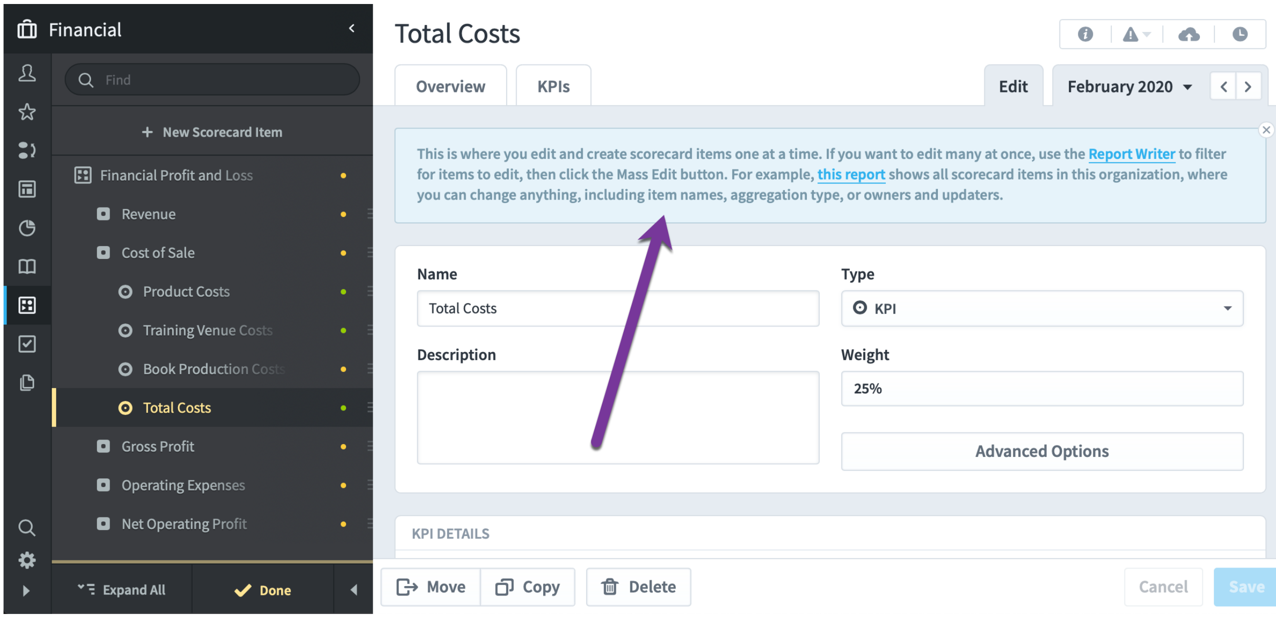
Rearranging the Tree

When you're on the Edit tab, you can rearrange your scorecard items by dragging and dropping them in the tree.



Editing Multiple Scorecard Items at Once

On the top of the Edit tab is a blue notification box explaining how to edit more than one scorecard item at the same time. Please see the Editing Multiple Scorecard Items at Once article for more information.



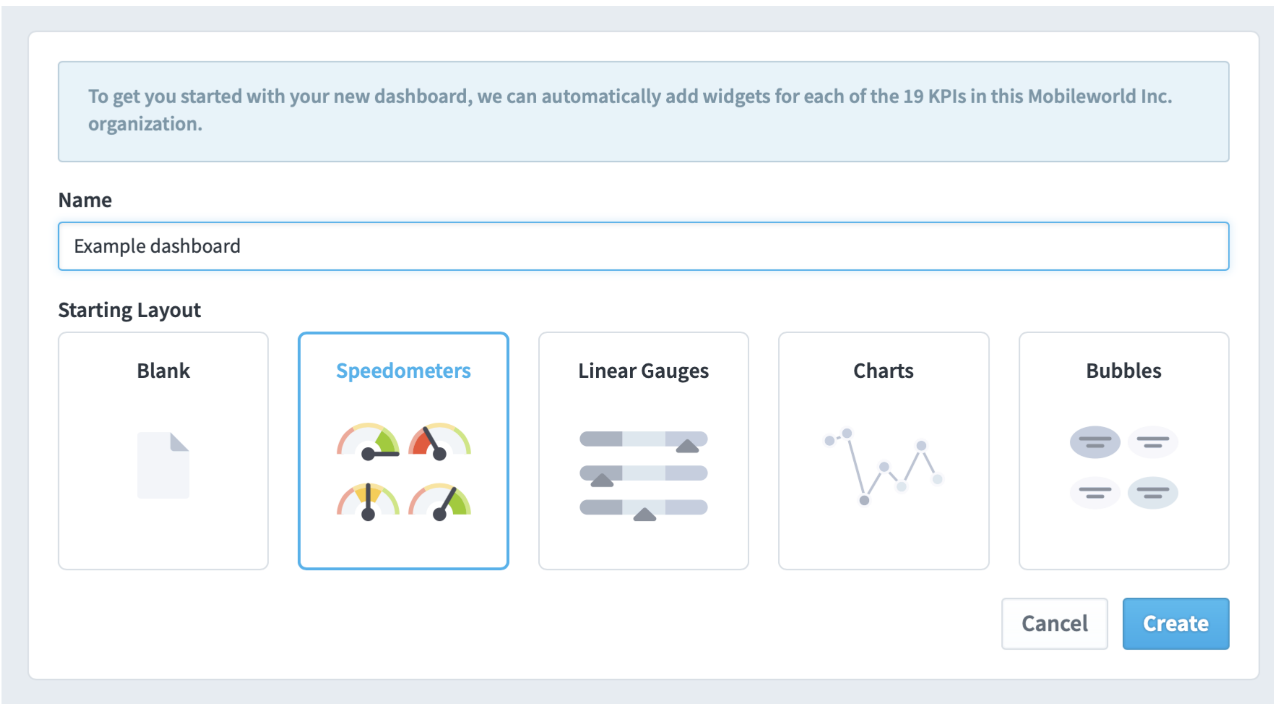
Financial
Find
New Scorecard Item
Financial Profit and Loss
Revenue
Cost of Sale
Product Costs
Training Venue Costs
Book Production Costs
Total Costs
Gross Profit
Operating Expenses
Net Operating Profit
Expand All
Done
Total Costs
Overview
KPIs
Edit
February 2020
This is where you edit and create scorecard items one at a time. If you want to edit many at once, use the Report Writer to filter for items to edit, then click the Mass Edit button. For example, this report shows all scorecard items in this organization, where you can change anything, including item names, aggregation type, or owners and updaters.
Name
Total Costs
Type
KPI
Description
Weight
25%
Advanced Options
KPI DETAILS
Move
Copy
Delete
Cancel
Save

Dashboards

Building Dashboards

Creating a Dashboard

New dashboards default to Blank, but you also have the option to automatically add widgets for each KPI in the organization. This can be a great starting point for building KPI dashboards.

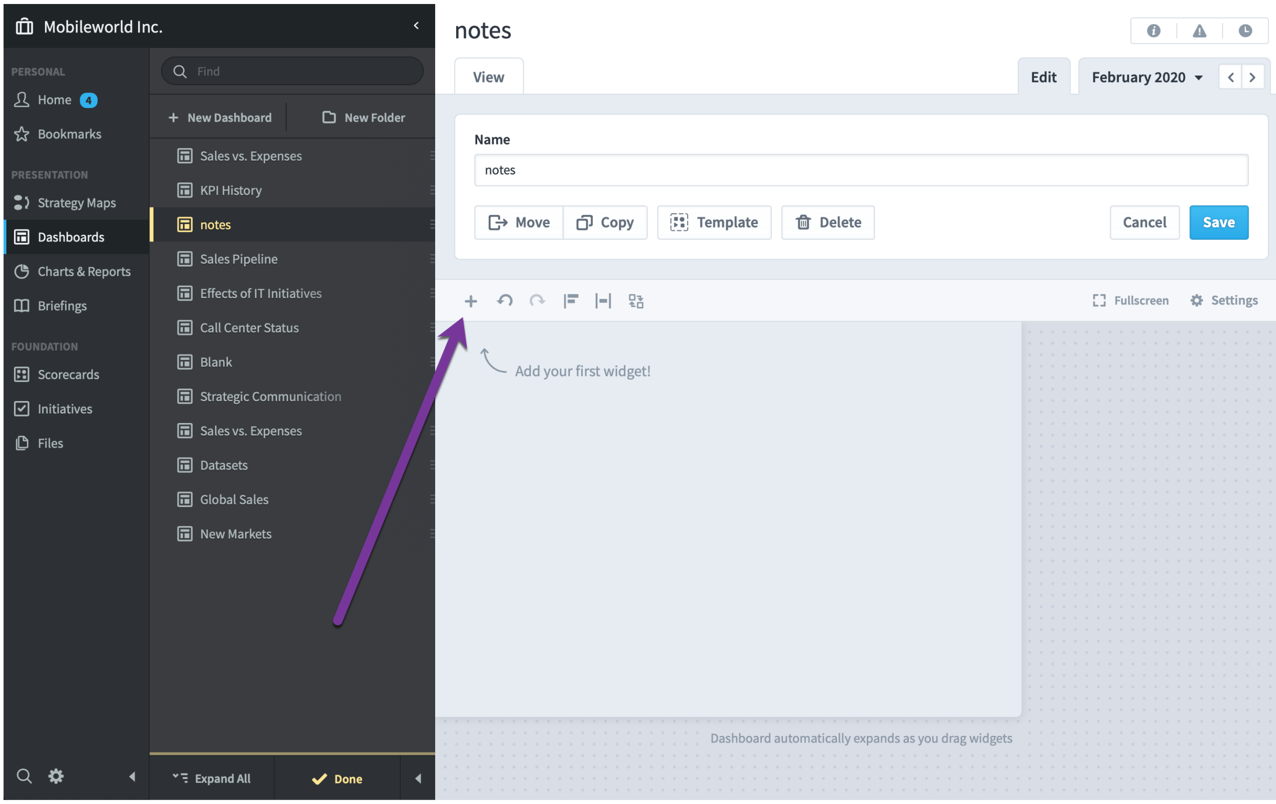


In this example, we've selected speedometers, and when you click "create," the new dashboard starts with a speedometer for every KPI in the organization.

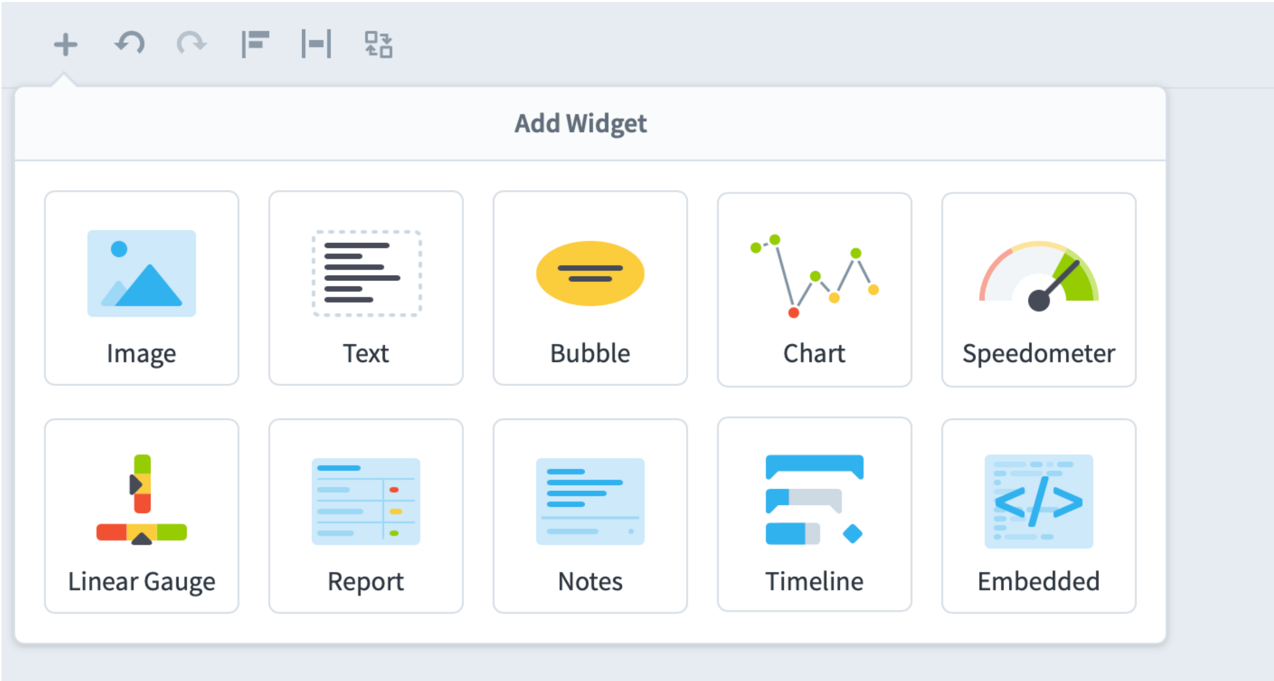
This is what the dashboard would have looked like if we had chosen bubbles.

Adding Widgets

To add a widget, click the *Add Widget* button in the button row.



This shows the *Add Widget* menu, where you can choose what you want to add to your dashboard.

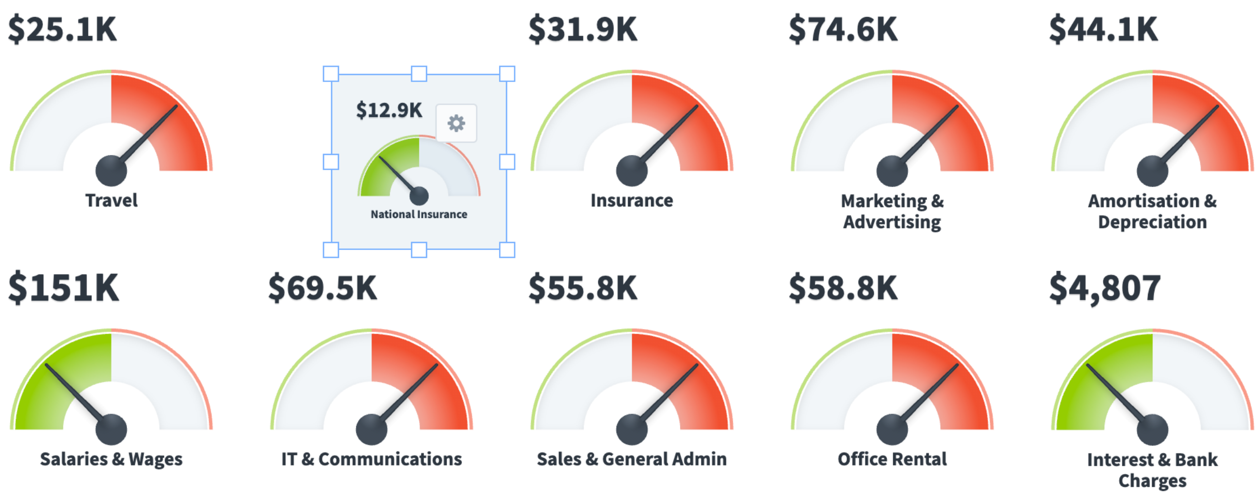


Each type of widget has unique configuration options, many of which are discussed in separate articles.

- Image
- Text
- Bubble
- Chart
- Speedometer and Linear Gauge
- Report
- Notes
- Timeline
- Embedded

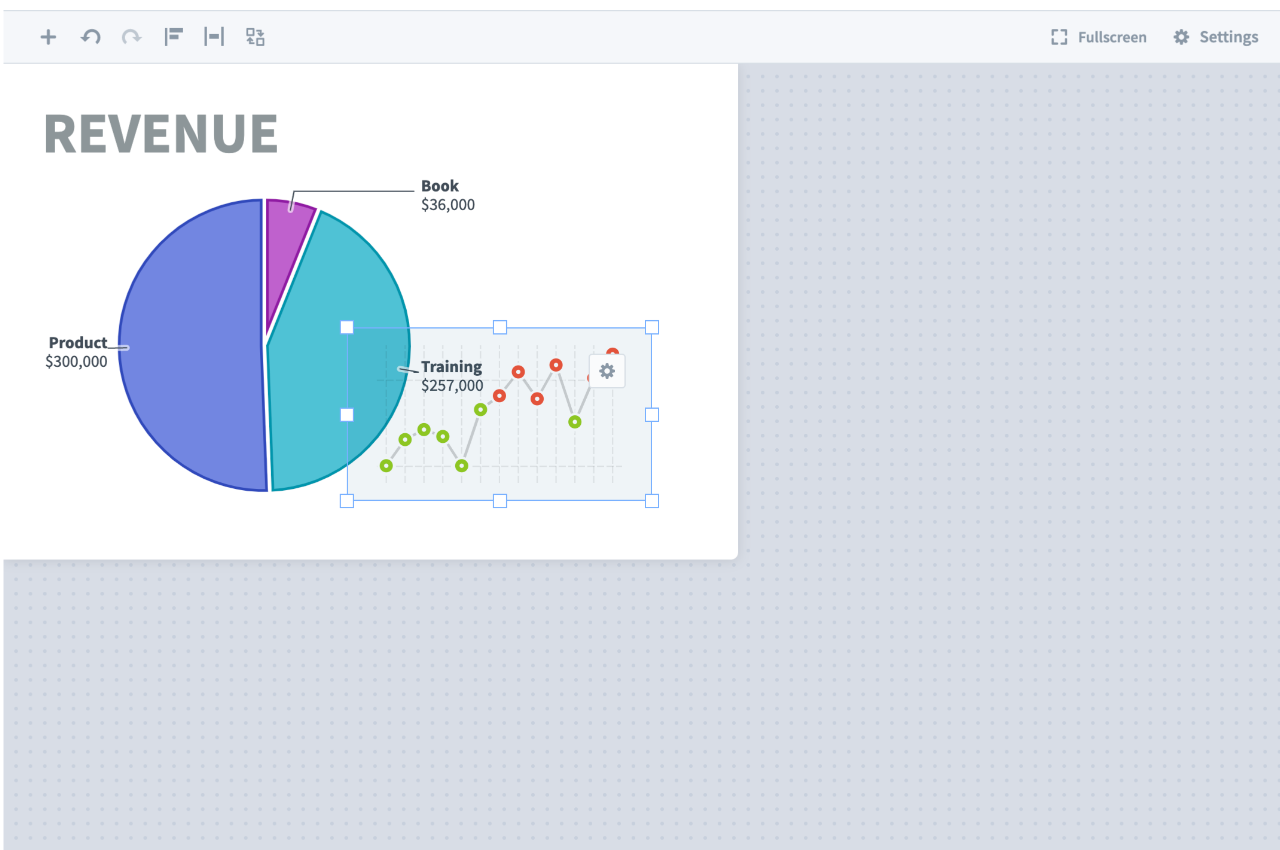
Arranging Widgets

Editing a dashboard is a lot like editing a PowerPoint slide. You can drag and resize dashboard widgets to create any layout you want. See the Widget Spacing, Alignment, and Sizing article for more information.

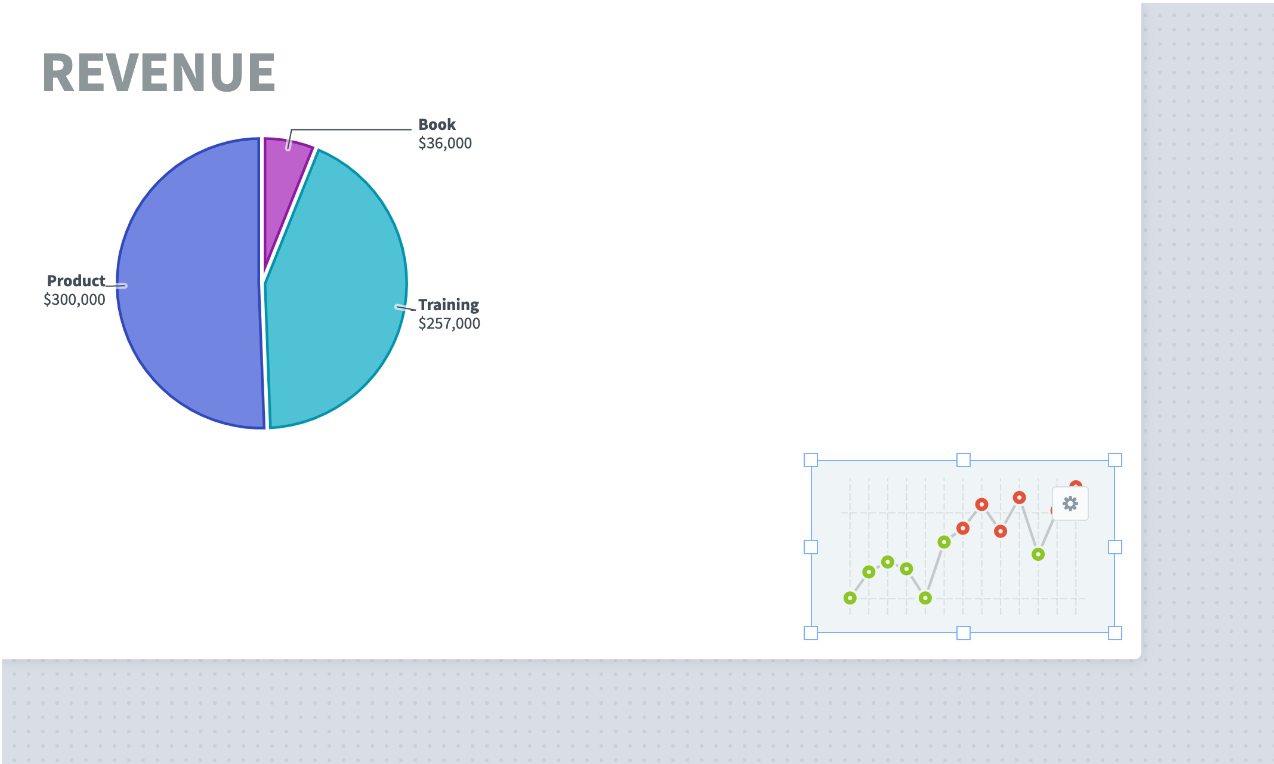


Automatically Resizing Canvas

Your dashboard canvas will automatically expand as wide as you want it to be. For example, we can start dragging this chart here:

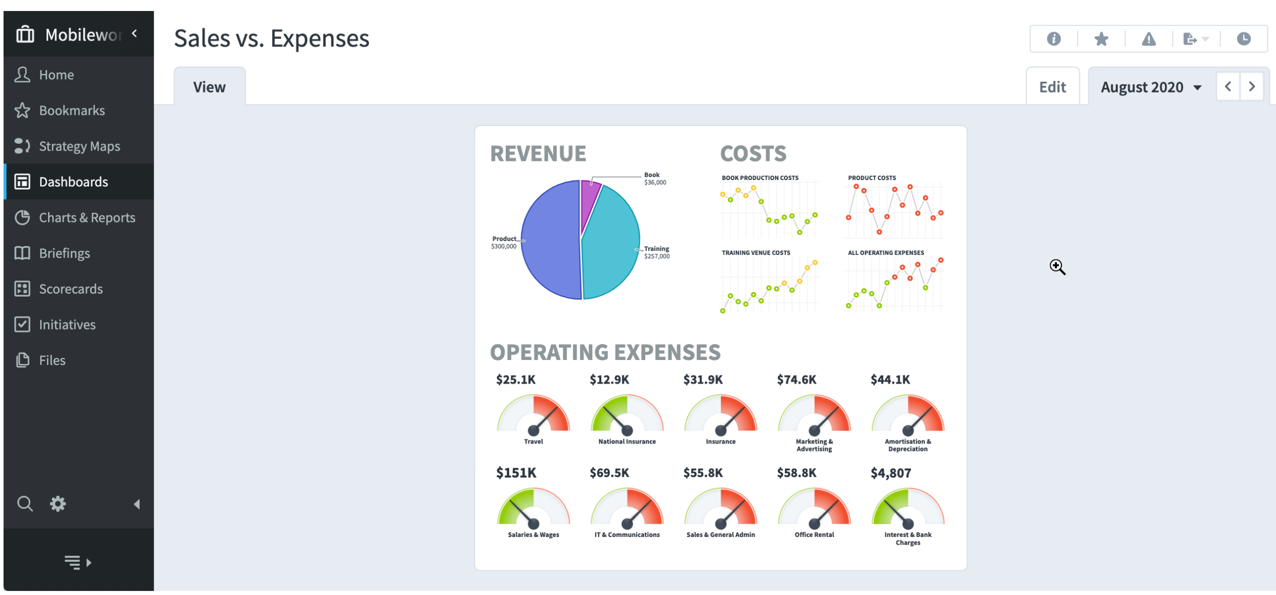


And then watch the canvas grow as we drag it away from the pie chart.

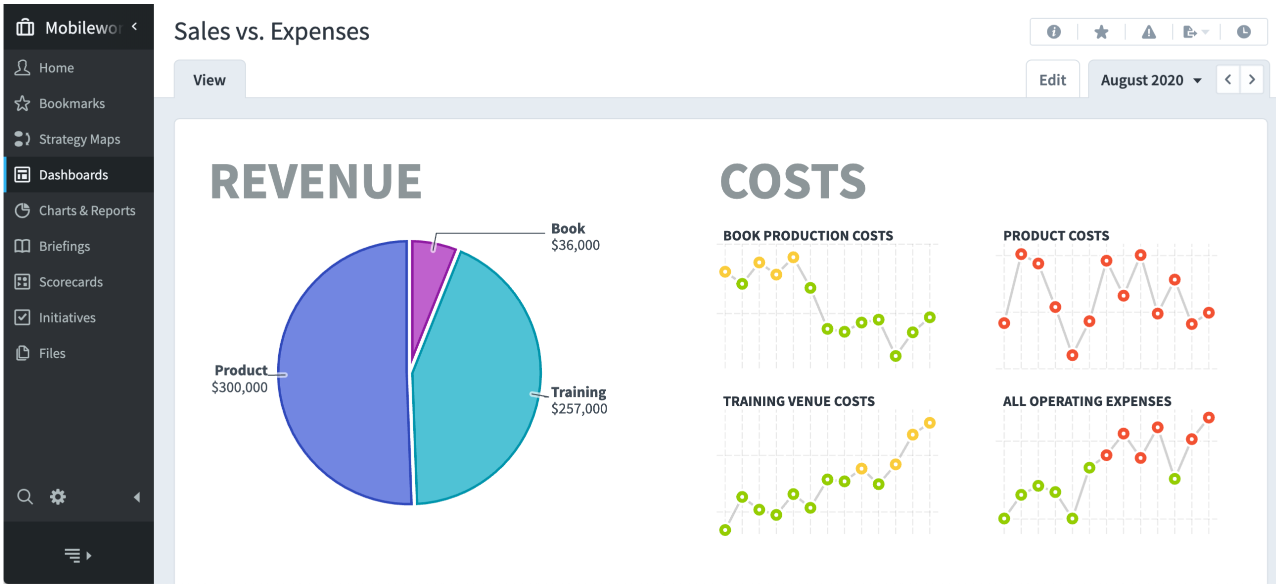


When you're viewing your dashboard, the size of your canvas doesn't matter. Spider Impact automatically zooms the dashboard so that it fits on screen. This is a lot like how PowerPoint presentations never have scroll bars during the presentation, but they do when editing.

Here we've made the browser very short and the dashboard resizes to fit.

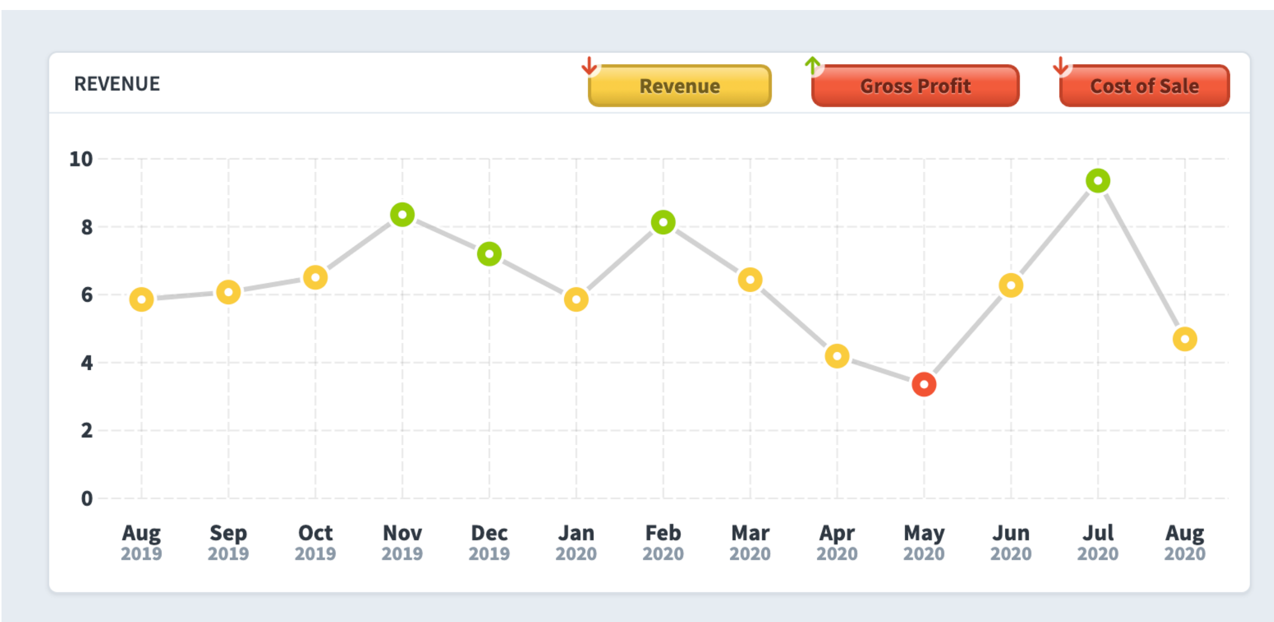


Of course you can always click on the space around the dashboard to zoom in. Clicking again will zoom you back out.

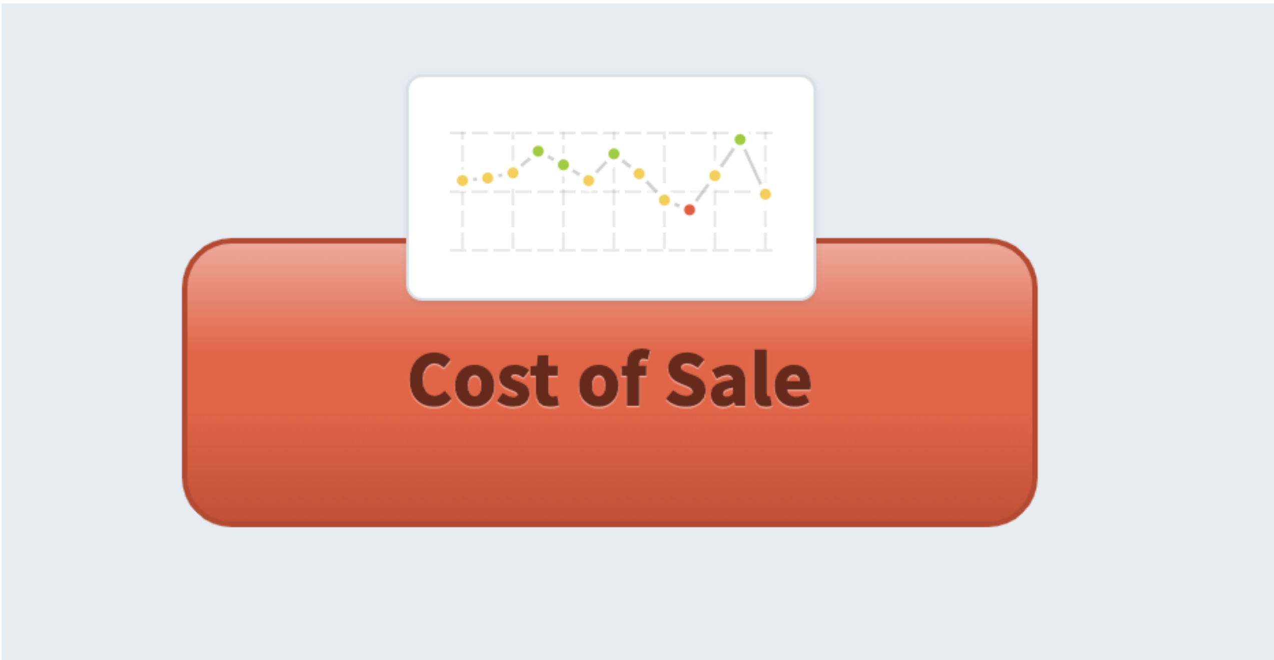


Automatic Ordering

Spider Impact automatically puts smaller dashboard widgets on top of larger dashboard widgets, completely avoiding the "move forward" and "move back" hassles seen in other software. For example, if you put small performance bubbles on top of a chart, they'll be above the chart so you can see them.



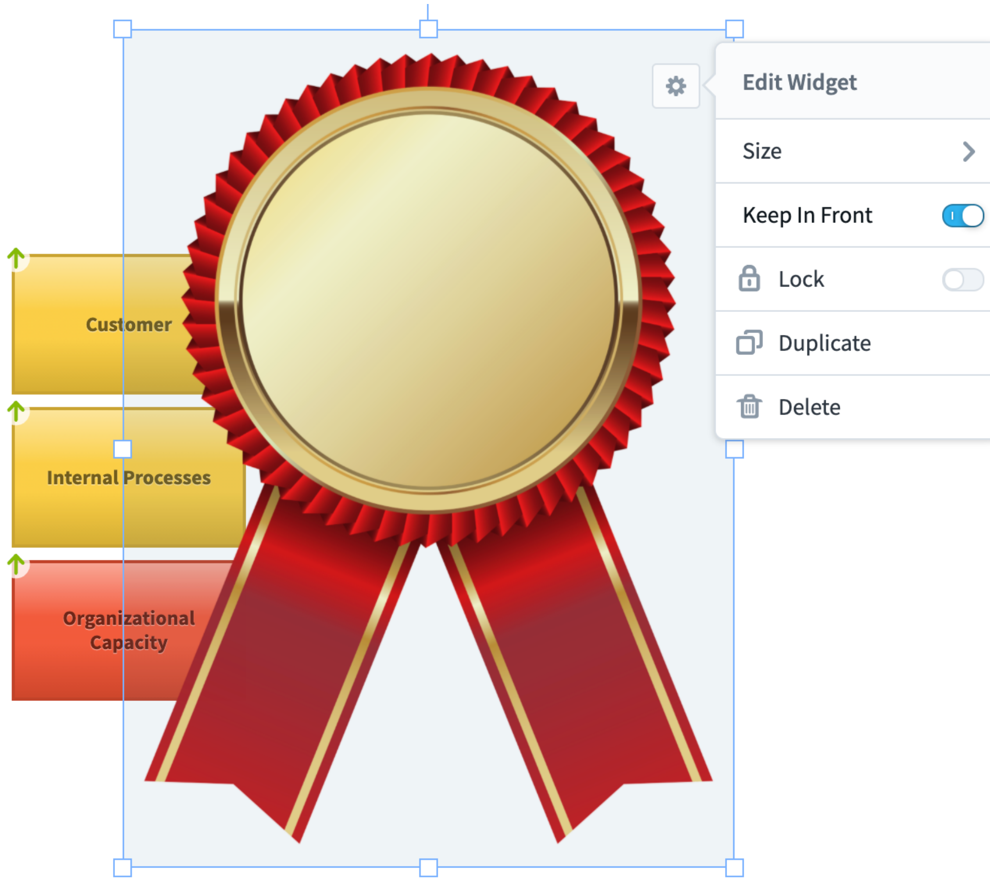
If we resize these exact same widgets and put the chart over one of the bubbles, however, the chart is now on top.



Keeping smaller widgets on top of larger widgets works great the vast majority of the time. If you're doing very complex layouts, however, there are times when you want to force a widget to the top.

In this example, we have an award image that we want to cover several smaller bubble widgets. Spider Impact is bringing the smaller bubble widgets to the front, though.

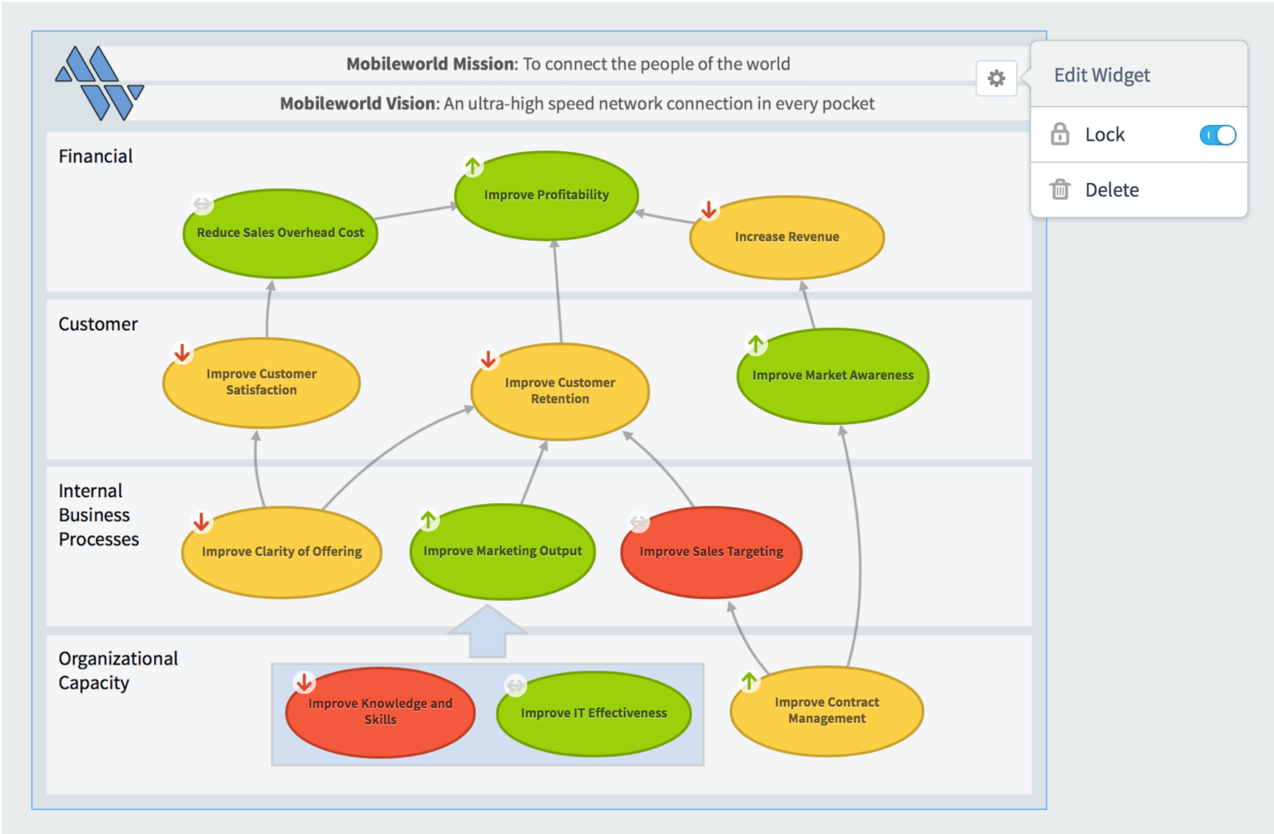
To force the award image to the top, we're going to turn on the "Keep in Front" toggle in the widget's configuration menu.



Locking Widgets

Because dashboards automatically put larger widgets underneath smaller widgets, you can upload a large background image and your smaller widgets will appear on top of it.

If you aren't careful, however, you can accidentally move your background image as you're editing other widgets. To solve this problem, just select the background image and turn on "Lock".



Not only does locking a widget prevent it from moving, but it also prevents it from being selected along with other widgets. So, when the background image is locked, you can drag to select all of the widgets on top of it without selecting the background image itself.

Please see the Dashboard and Strategy Map Backgrounds article for more information about all of the ways you can make dashboards even better with background images.

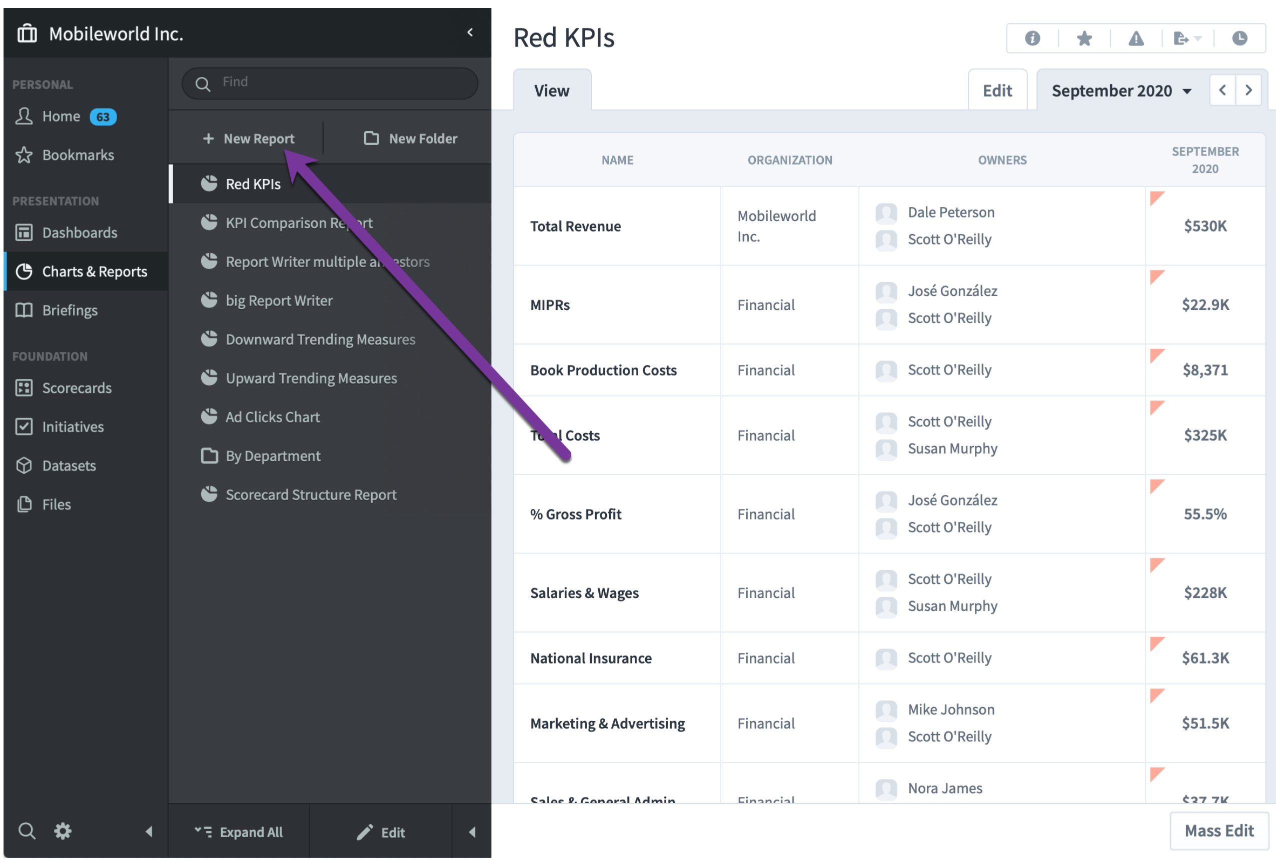
Charts & Reports

Overview of Reports

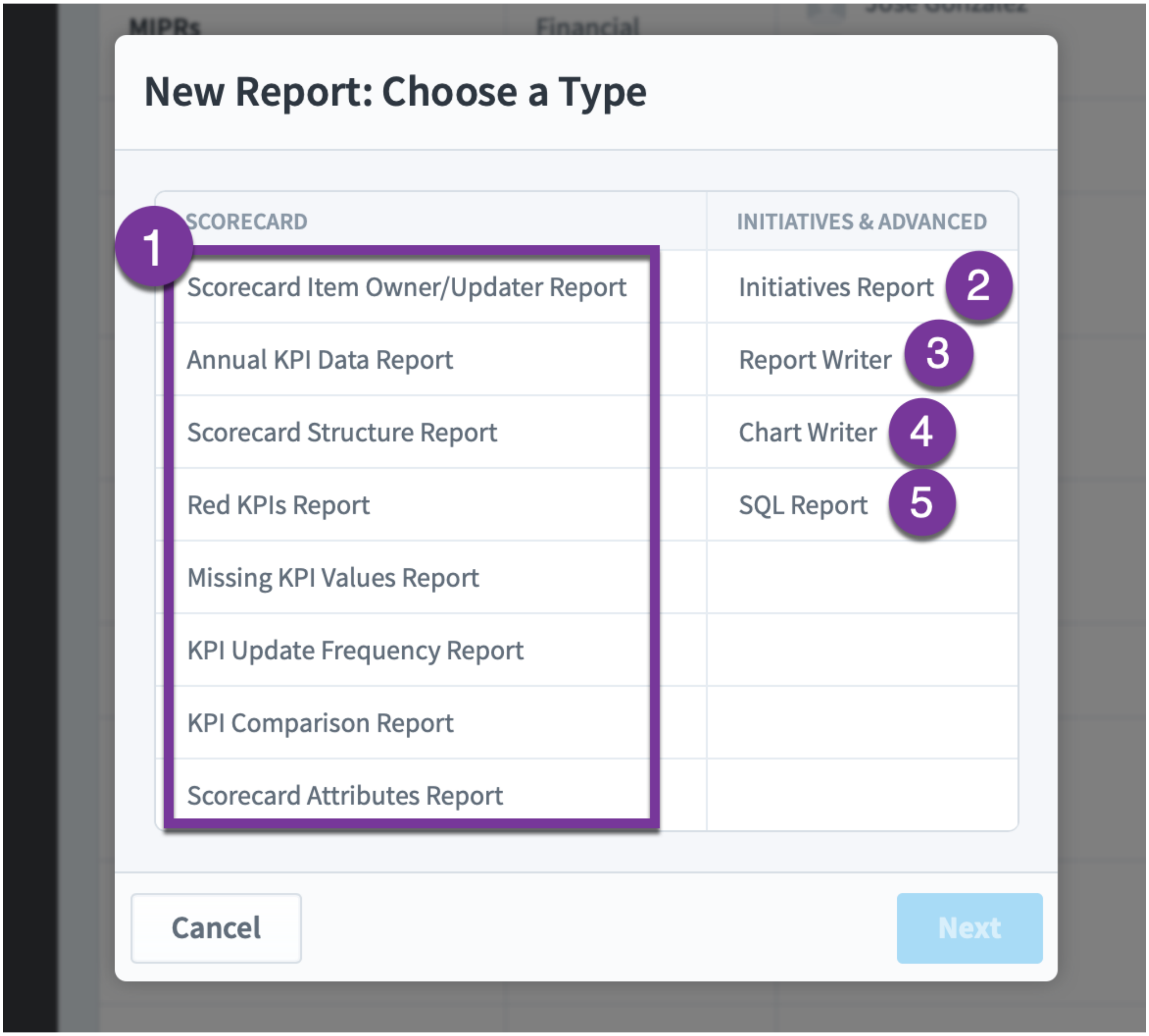
The Basics

Reports show information about many Scorecard or Initiative items at once. For example, you can choose to view all of the downward trending KPIs, or all of the initiatives owned by a particular person.

To create a new report. click on the New Report button on the top of the display pane.



This shows the New Report menu with all of the different types of reports you can create.



1. The 8 reports in the left column are all pre-built scorecard item reports. They require very little input from you and can quickly show you important performance data.
2. The Initiatives Report shows you data about how your initiatives are performing.
3. Report Writer is an advanced report designer that allows you to choose not only the columns your report displays, but also which scorecard items.
4. Chart Writer is an advanced chart designer, allowing you to create a variety of charts, including pie, bar, line, area and polar.
5. The SQL Report allows you to write raw SQL against any of the import databases you have permission to access. It displays the results as a

standard Report.

Column Sorting

You can sort reports by clicking on column headers. The default sort order is by organization tree order and then scorecard tree order:

	AUGUST 2020		
NAME	SCORE	KPI VALUE	GOAL
Mobileworld Balanced Scorecard	6.03		
Financial	6.73		
Increase Revenue	4.91		
Product Revenue	0.23	$436K	$465K
Training Revenue	6.93	$260K	$260K
Book Revenue	9.13	$43.7K	$40K
Total Revenue	3.35	$740K	$765K
Improve Profitability	6		
Net Operating Profit (before tax)	9.7	$85.8K	$75.4K
% Net Operating Profit	2.3	8.17%	10%
Reduce Sales Overhead Cost	10		
Sales & General Admin	10	$2,263	$30.2K

Clicking on a column header like Score sorts performance in ascending order and reveals those areas of most concern:

	AUGUST 2020		
NAME	SCORE ^	KPI VALUE	GOAL
Product Revenue	0.23	$436K	$465K
Contract management risk index	0.53	13.2%	50%
Campaign e-Mails Sent	0.93	3,328	3,500
Improve Customer Retention	2.08		
Customer Churn	2.08	3.75%	1%
Improve Contract Management	2.27		
% Net Operating Profit	2.3	8.17%	10%
Improve Marketing Output	2.55		

Clicking on the Score column again switches the sort order to descending so the best performance is at the top:

	AUGUST 2020		
NAME	SCORE	KPI VALUE	GOAL
Reduce Sales Overhead Cost	10		
Sales & General Admin	10	$2,263	$30.2K
SEO Project Spend to Date	10	332K	5,000
Net Operating Profit (before tax)	9.7	$85.8K	$75.4K
Book Revenue	9.13	$43.7K	$40K
Improve Market Awareness	8.89		
Improve IT Effectiveness	8.43		
IT effectiveness index	8.43	99.59%	98%

Clicking a third time removes the sort and reverts to the default sorting.

Other Sections

Overview of Initiatives

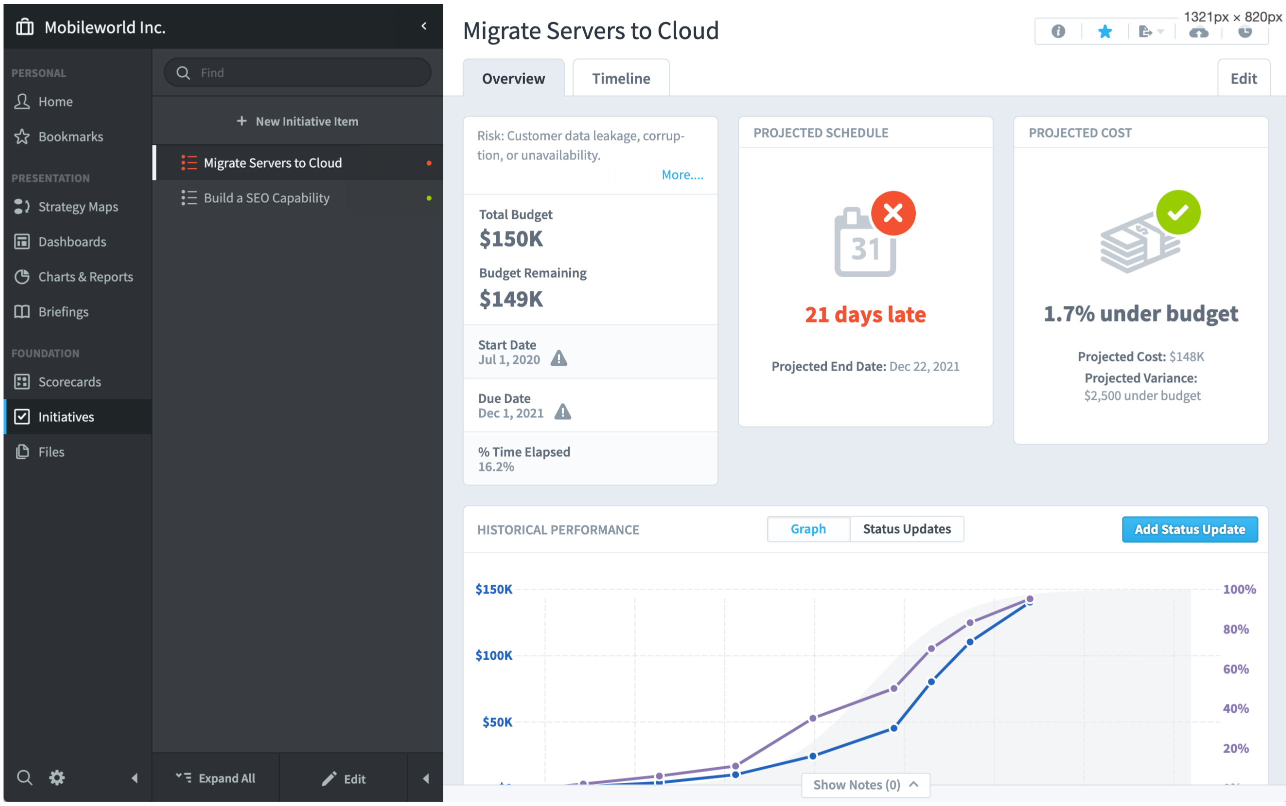
The Basics

In the Scorecards section we track KPIs and strategy. You define what you want to measure, and then you measure the same things month after month, year after year.

Initiatives are different. They have a specific start and end date, and they often are put into place to correct the performance of a scorecard item. For example, in the balanced scorecard methodology, Initiatives are put in place to fix poorly performing Objectives.

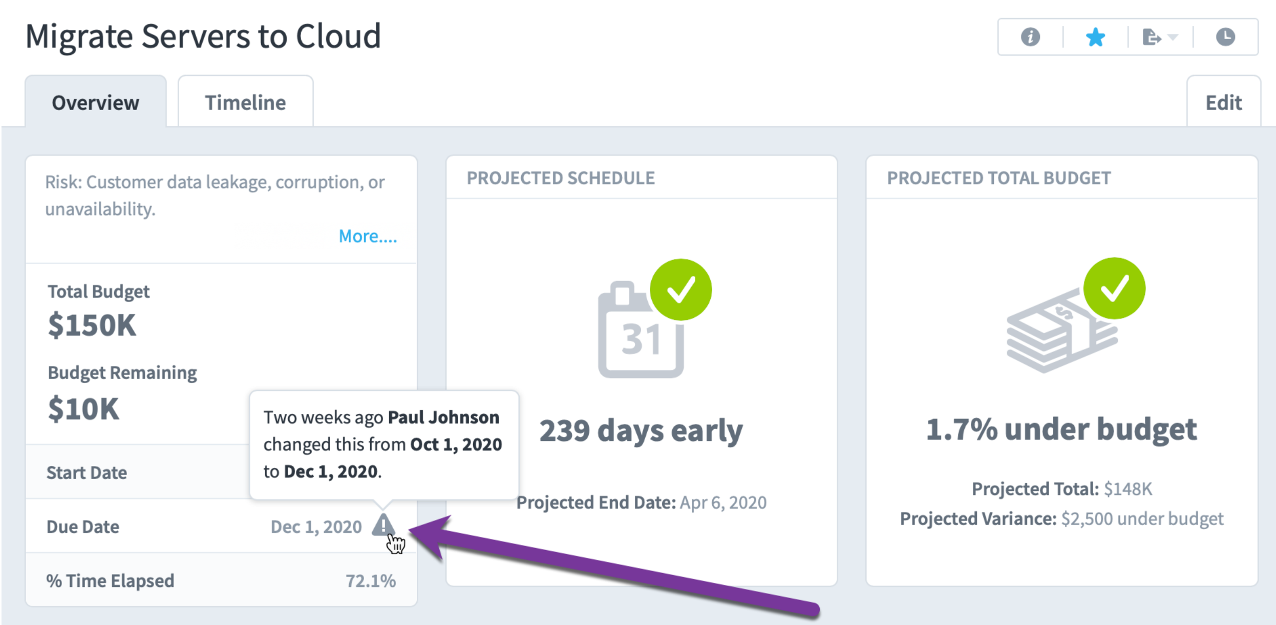
Overview Tab

The Initiatives Overview tab gives you a good feel for the overall performance of your initiative. Spider Impact will predict whether your initiative will be on time and under budget.



Changes to Key Numbers

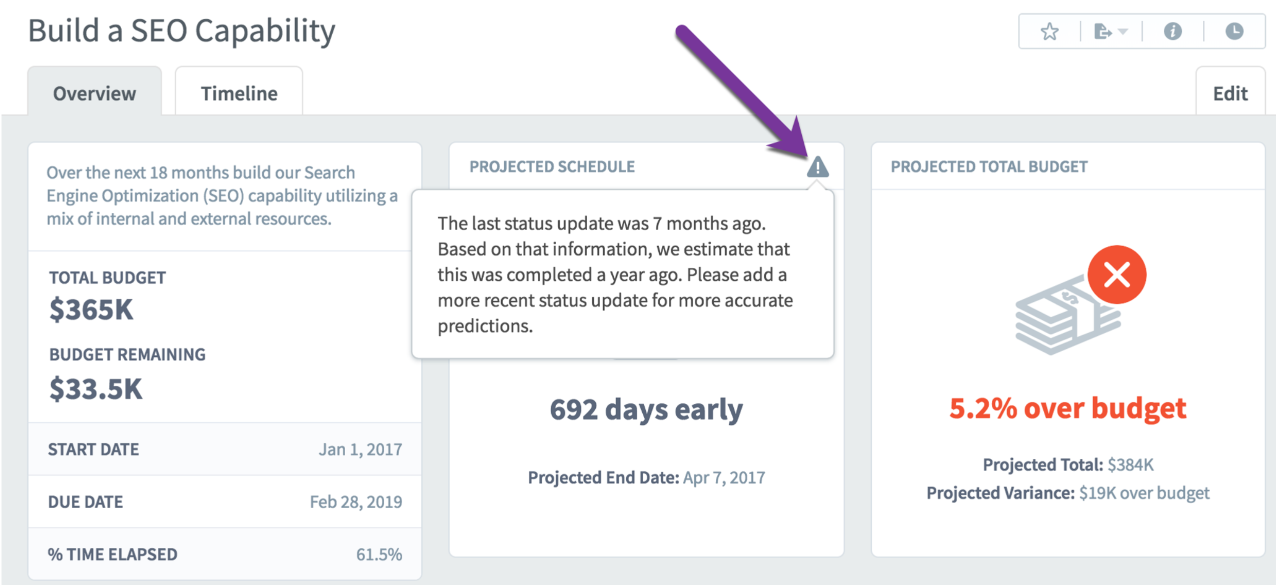
In an effort to promote transparency, whenever an initiatives's start or end date is edited, that information is displayed next to the new value on the overview tab.



Projected End Dates in the Past

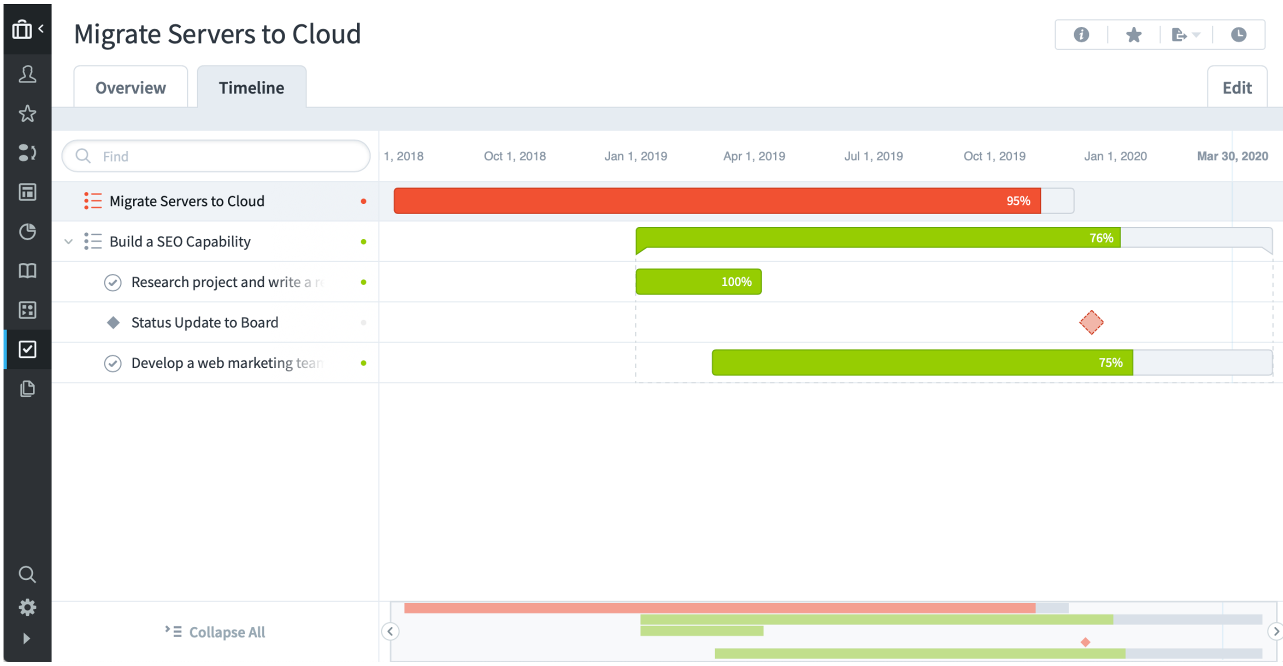
Spider Impact automatically predicts when an initiative will be finished and what its budget will be at completion. These predictions start to fall apart, however, when initiatives don't get regular status updates.

It can get particularly confusing when a projected end date is in the past. This can happen when the last status update is so long ago that the initiative has probably ended by now. To avoid this confusion, there's an indicator next to projected end dates that are in the past, and when you click on it, there's a tooltip explaining what is happening.

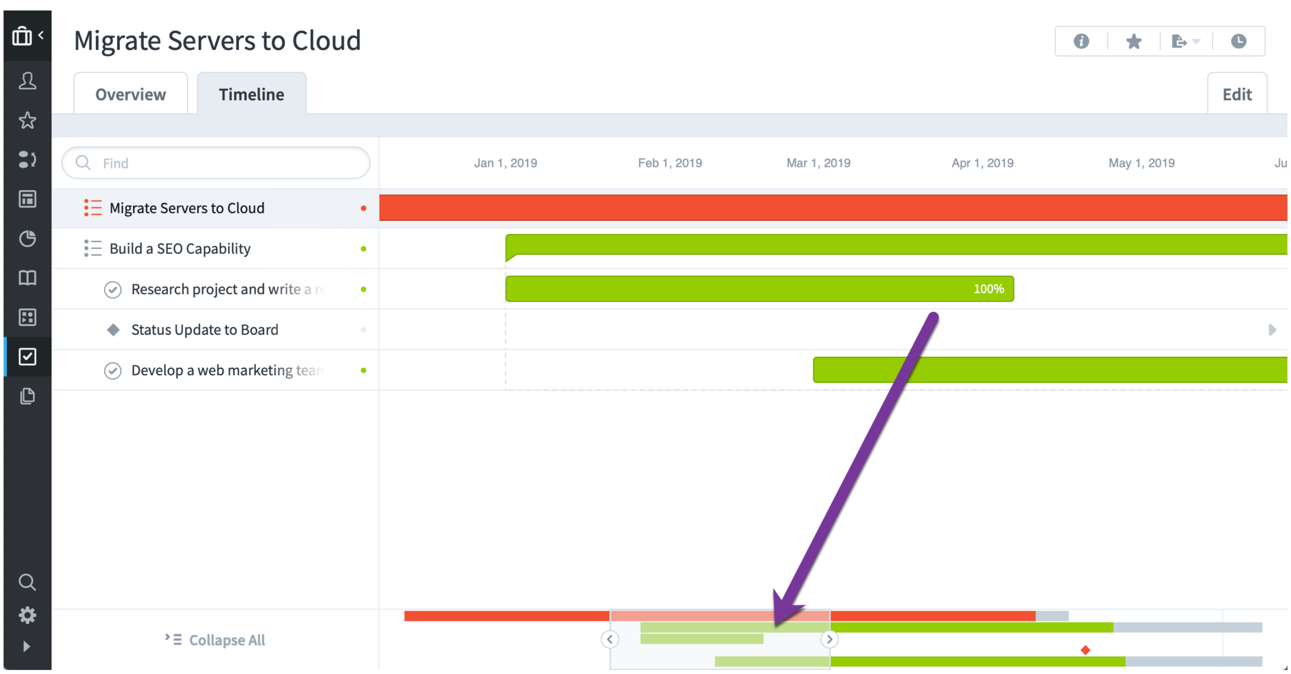


Timeline Tab

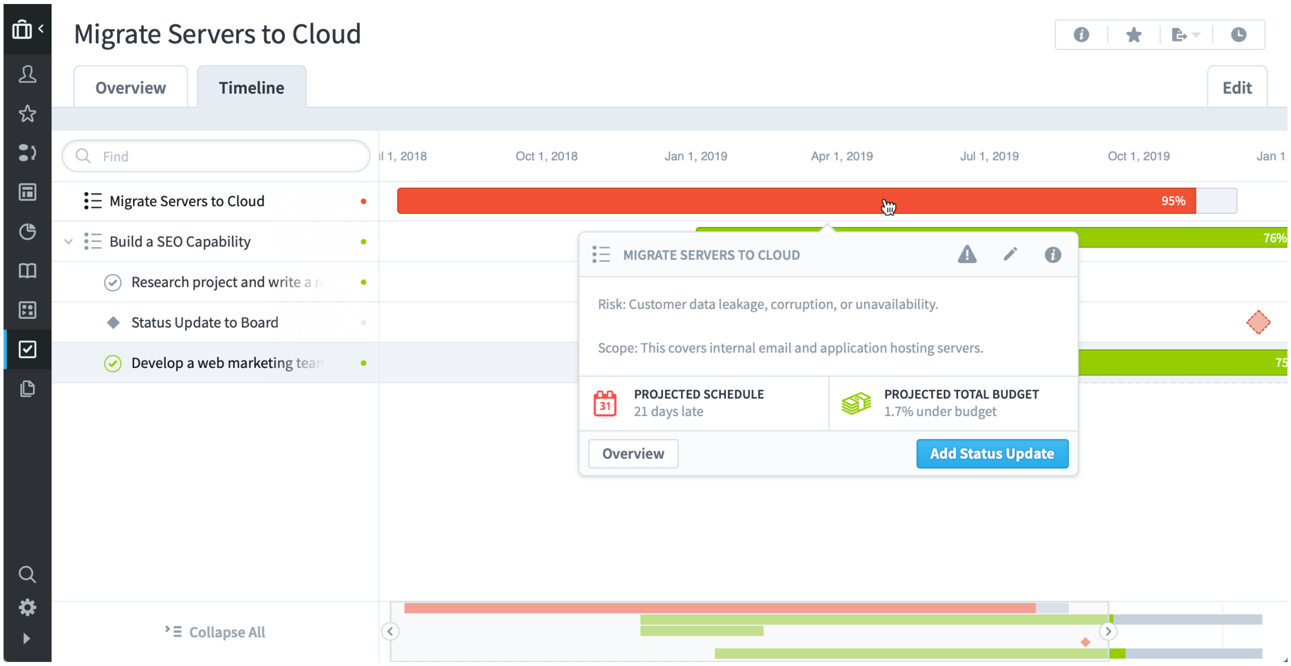
The Timeline tab shows you a fully interactive Gantt chart view of the current organization's initiatives.



Just like everywhere else in Spider Impact, you can expand and collapse the initiative tree on the left. There's also a timeline navigation bar on the bottom that allows you to zoom and pan through time.



If you click on any of the initiative items in the Gantt chart, you can see detailed information about that item, like its description and the projected budget and schedule performance.



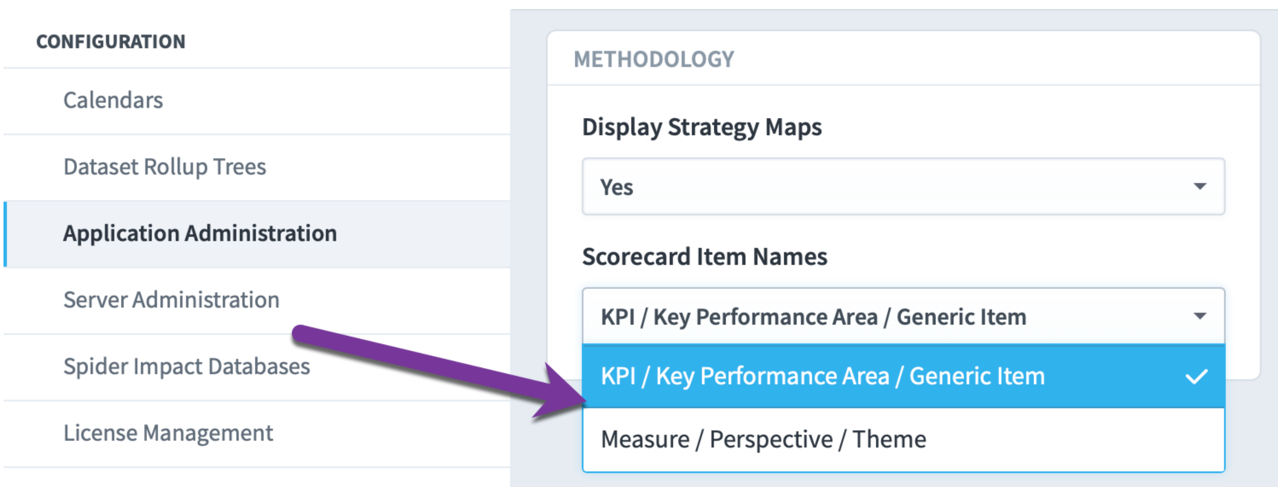
Application Administration

Choosing Methodology

Choosing Methodology Language

Spider Impact works great with any performance management methodology. To make getting started even easier, you can choose between popular methodology language right in the app

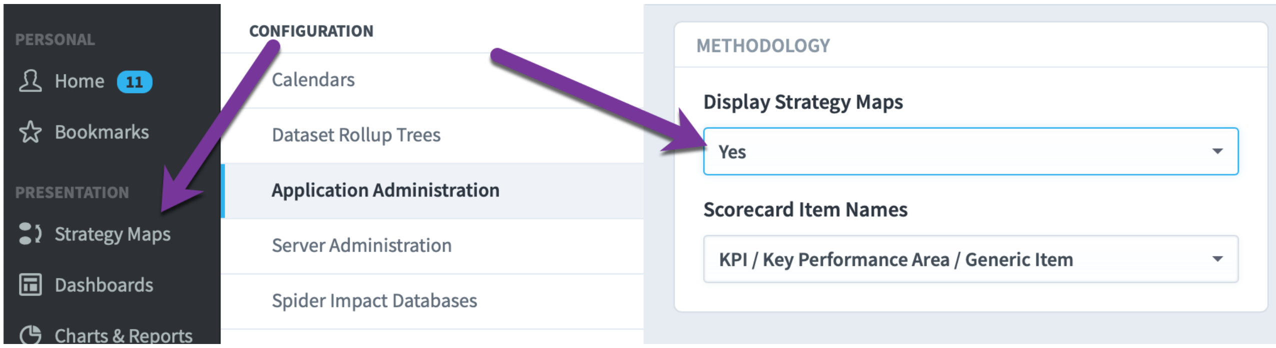
There's a new Methodology section in Application Administration where you can choose what language to use in Spider Impact. For scorecard item names you can choose between balanced scorecard language like *Measure, Perspective,* and *Theme*. Another option is KPI language like *KPI, Key Performance Area,* and *Generic Items.*



As always, you can further customize any language in the software with a custom language file. Please let us know if you need help setting that up.

Enabling and Disabling Strategy Maps

Strategy Maps are similar to Dashboards, but they're solely focused on showing your big-picture strategy. The Strategy Maps section is now available to all Spider Impact customers and can be enabled in Application Administration.


PERSONAL
Home 11
Bookmarks
PRESENTATION
Strategy Maps
Dashboards
Charts & Reports
CONFIGURATION
Calendars
Dataset Rollup Trees
Application Administration
Server Administration
Spider Impact Databases
METHODOLOGY
Display Strategy Maps
Yes
Scorecard Item Names
KPI / Key Performance Area / Generic Item

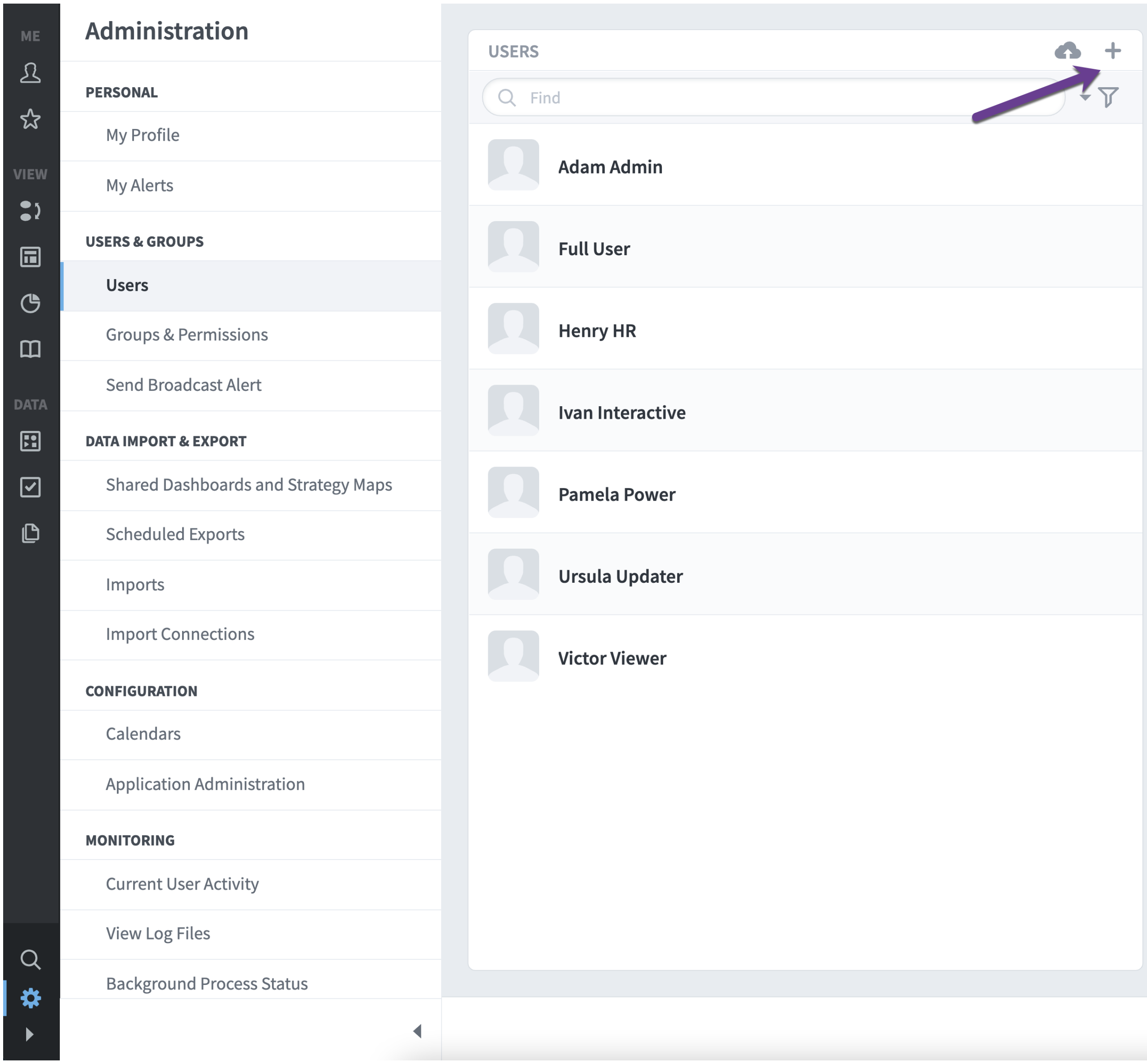
Users

Overview

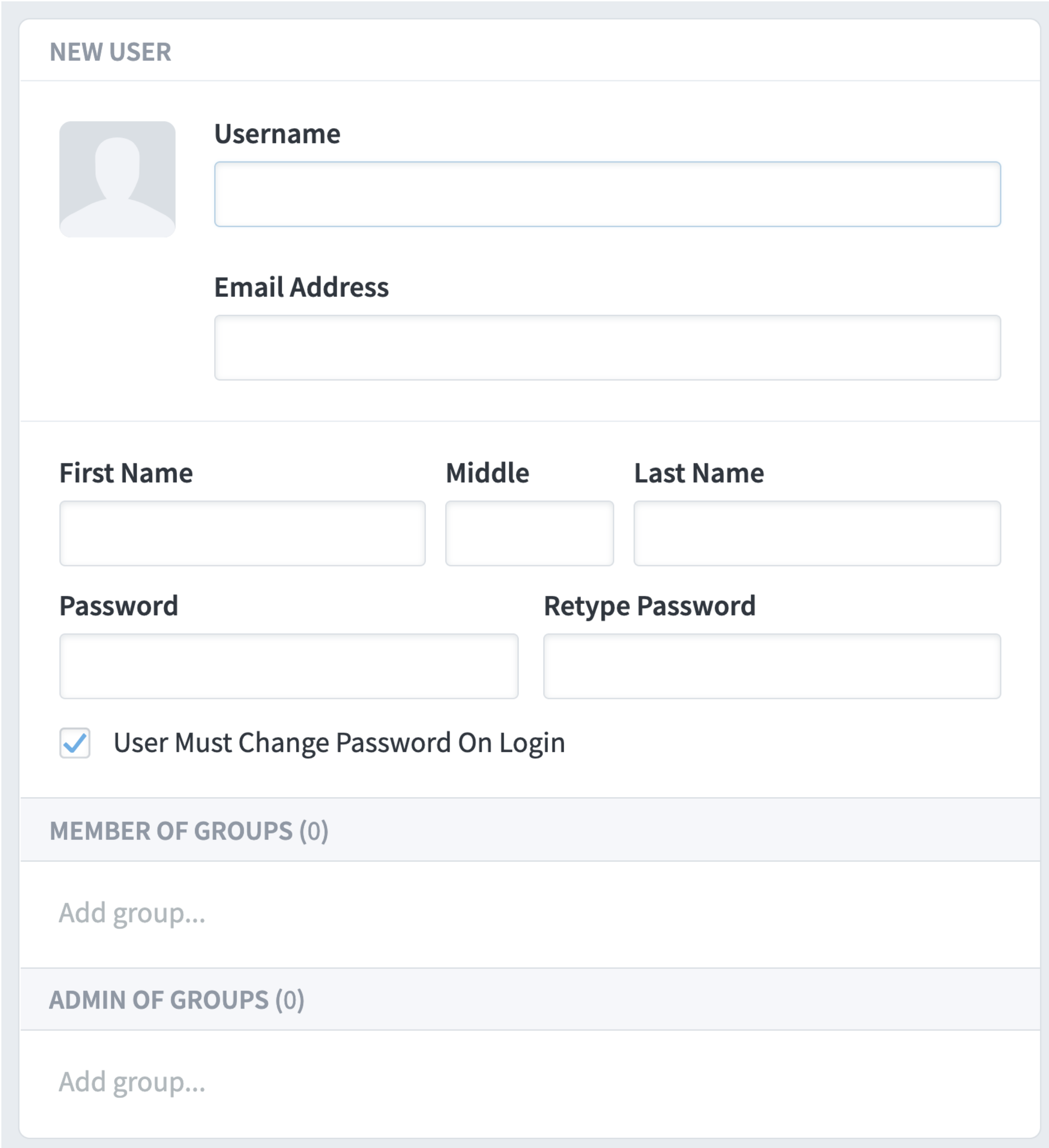
Users are created and managed on the Admin > Users screen.

Adding Users

You can add a new user using the + button.

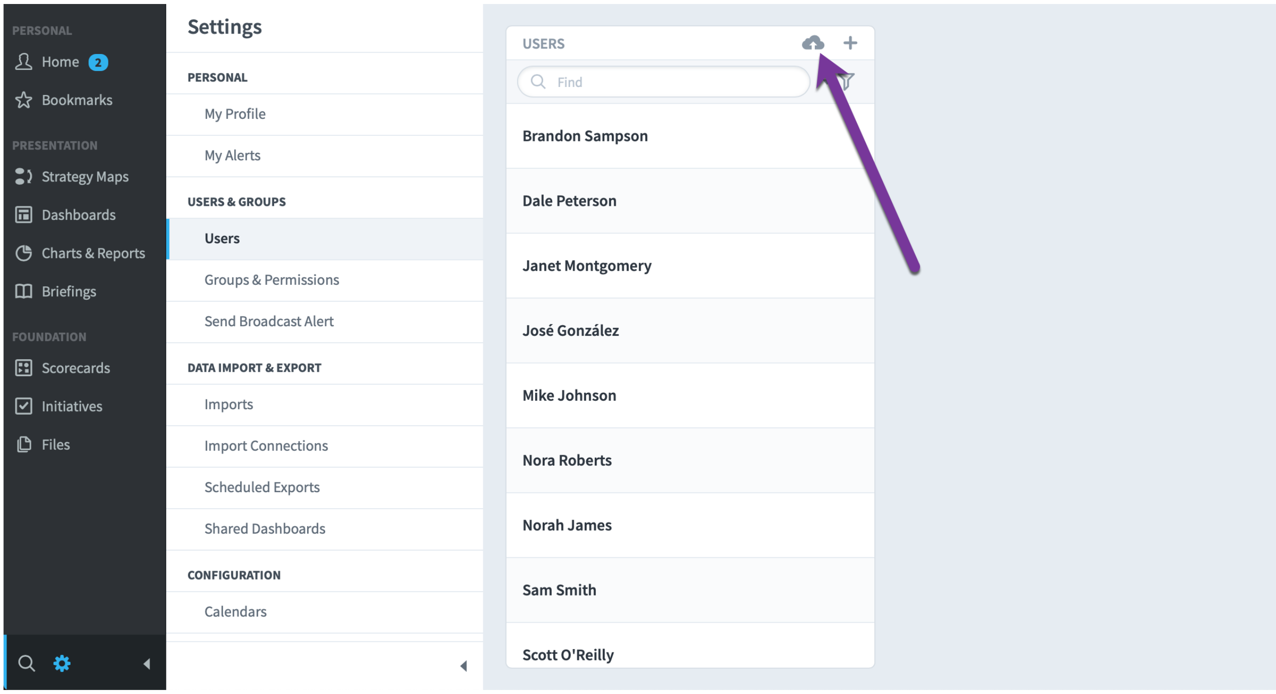


You can then enter a username, email address, first and last name, and password. You have the option of whether or not the user must change their password on initial login, and can assign the user as a member or admin of a group.

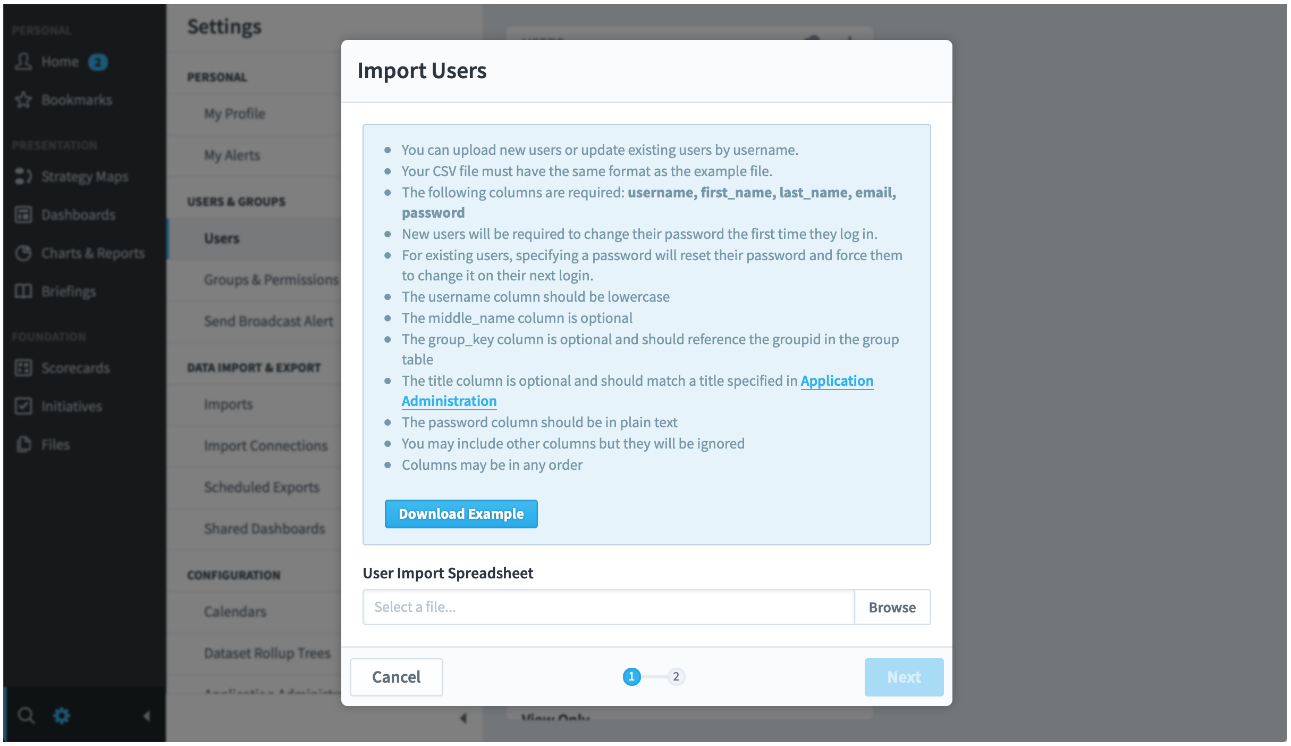


Importing Users

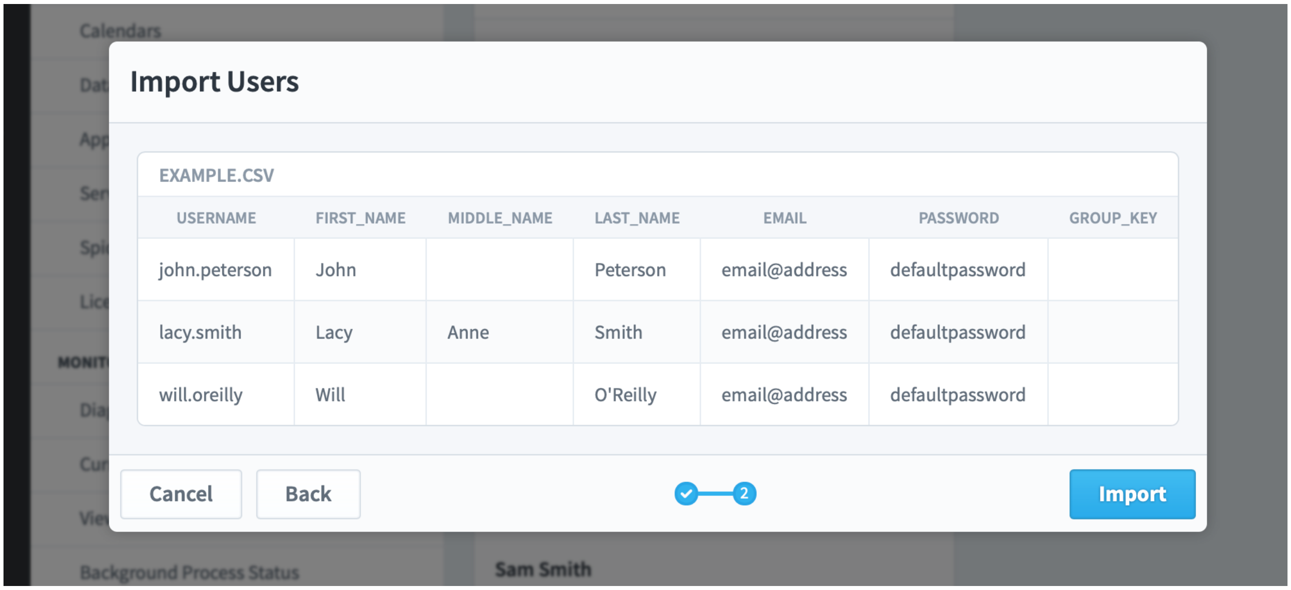
Rather than manually adding users one at a time, administrators can import multiple users at a time via spreadsheet. To start, just click on the "Import" button.



This brings up a dialog where you can upload your spreadsheet. It also has instructions on data format and an example file to download. You can build up a list of users to include their username, email address, first and last name, and password (the middle name, group_key, and title columns are optional). Once the file has been developed, you can import the users using the Browse button.

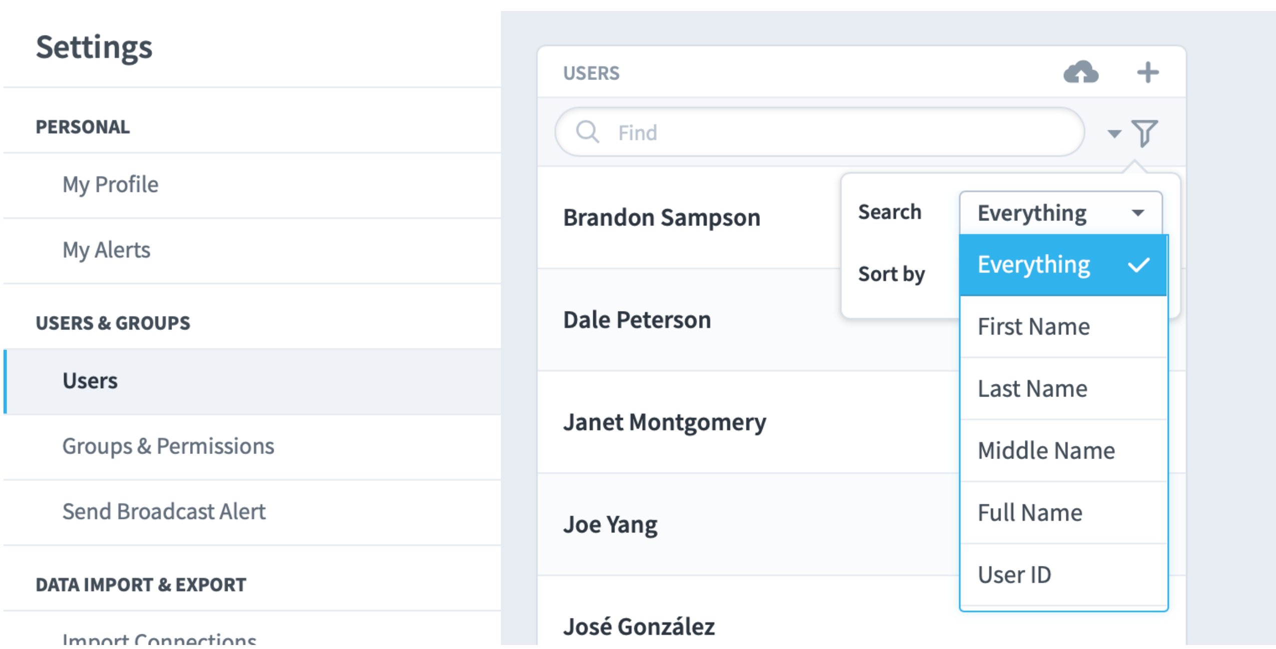


Before you run the import, you can preview your data and you will be alerted to any invalid fields. For existing users, specifying a password will reset it and force them to change it on their next login.



Searching Specific User Fields

Administrators can now choose which fields to search against when editing users. It defaults to Everything to match the previous functionality.



Permissions

User permissions are defined within groups.

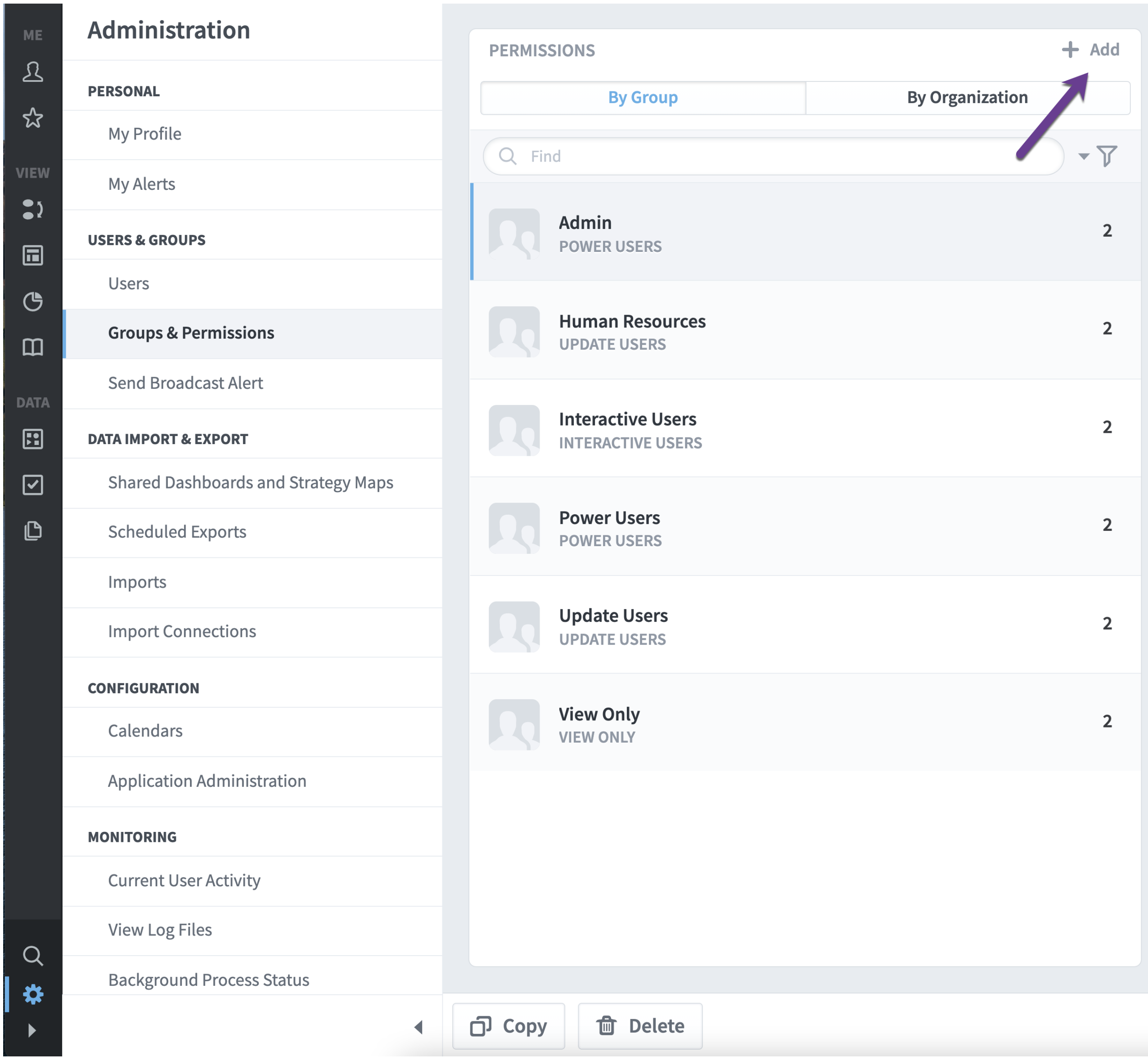
Groups

Overview

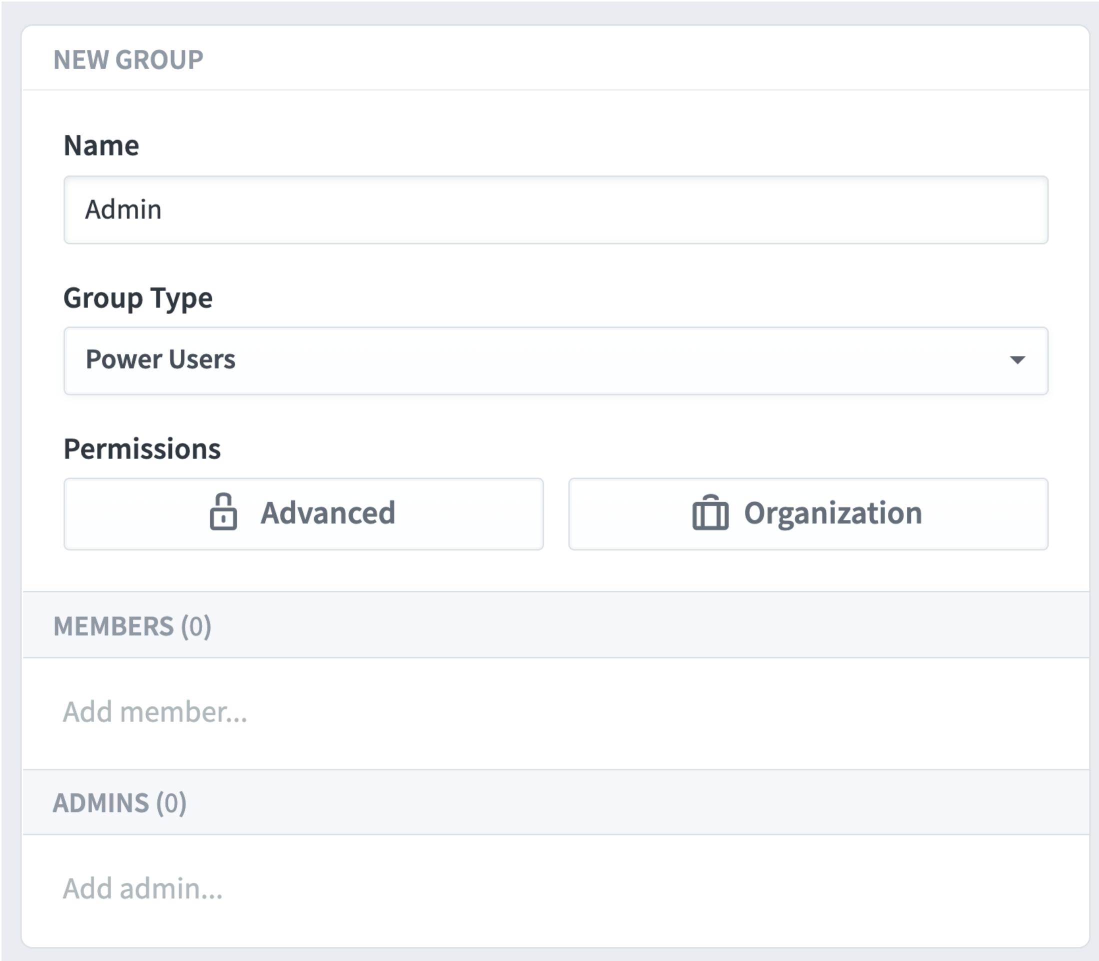
Groups are created and managed on the Admin > Groups & Permissions screen. Groups determine permissions within Spider Impact. Permissions applied to a group are granted to all of its members.

Creating Groups

You can create a new group using the + Add button.



You can then enter a name for the group, select a group type, apply Advanced and Organization permissions, add group members and group admins.

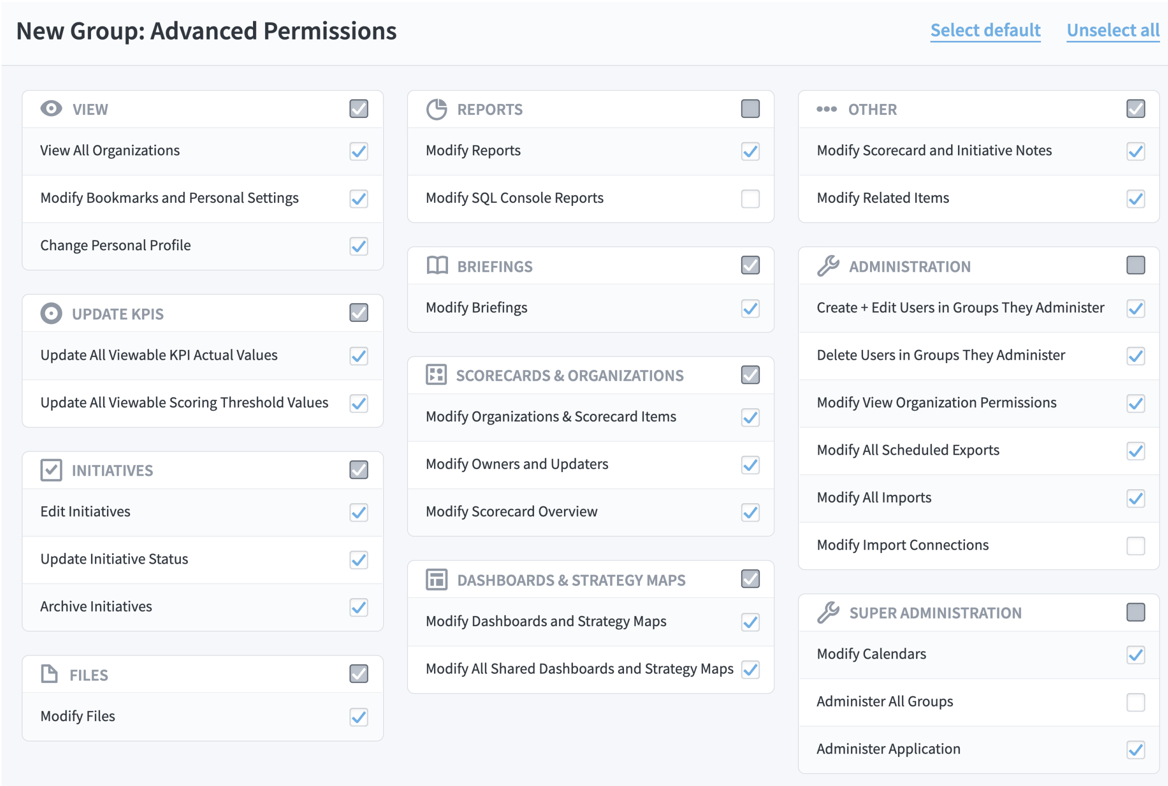


Group Types

You can pick from four different group types. Once you pick a group type, permissions for the group can be set under Advanced.

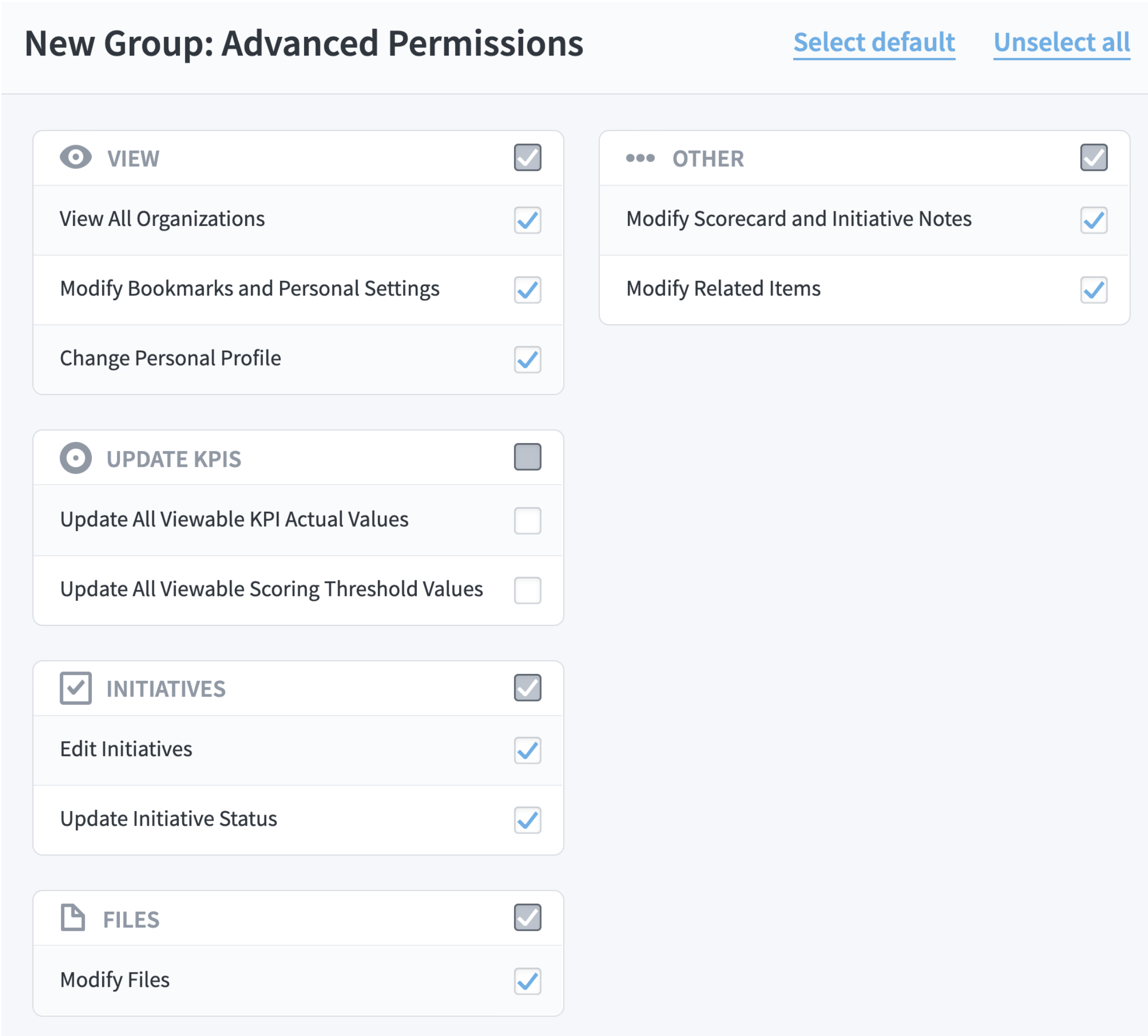
Power Users

Power Users have the most permissions available to them. Administrators are typically set as power users and granted all permissions.



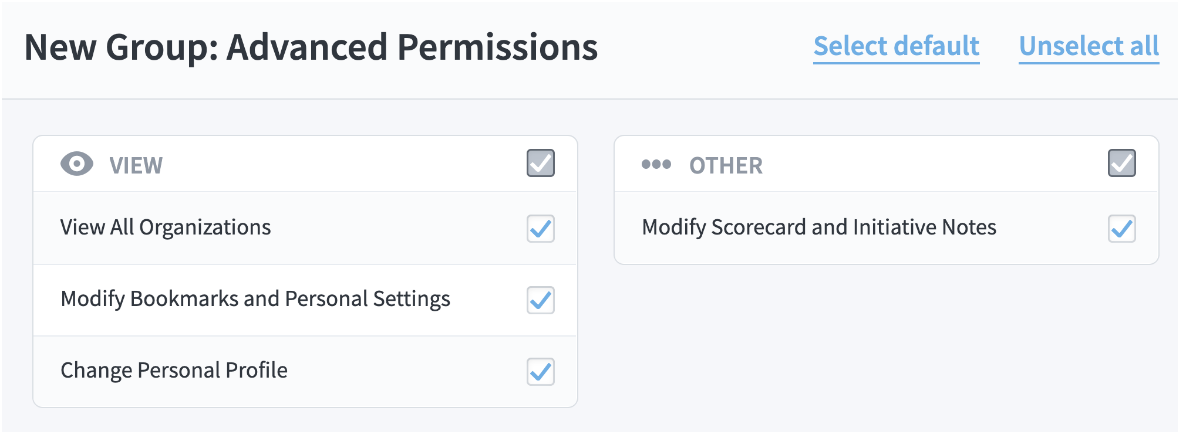
Update Users

Update Users can own items, set bookmarks, update KPI actual values and thresholds, add notes, modify files, set alerts and create tasks.



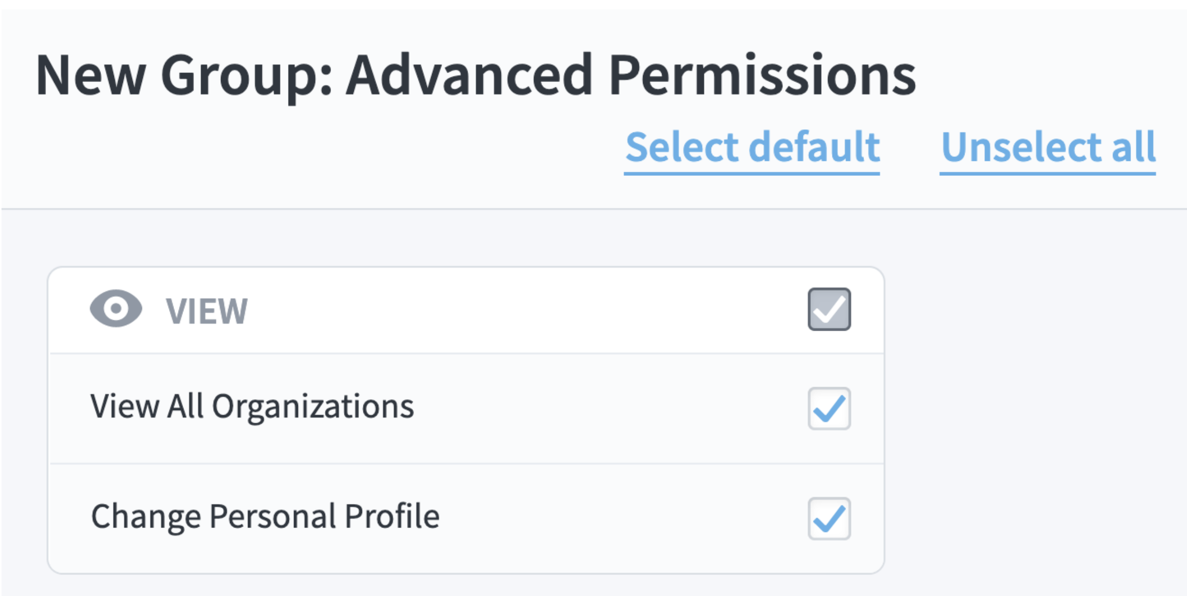
Interactive Users

Interactive Users can set bookmarks, add notes and set alerts. Company executives are typically set as interactive users and granted the ability to see all organizations. They can review performance and comment on their findings.



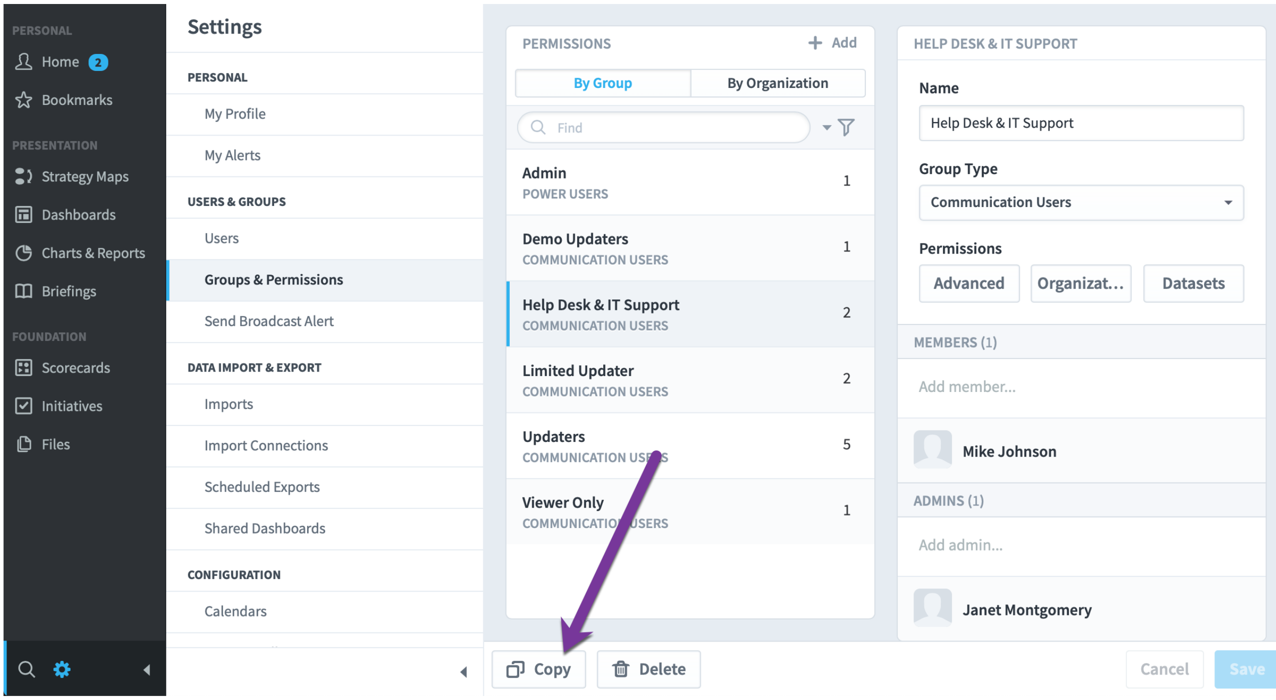
View Only

View Only users can only view things in Spider Impact.

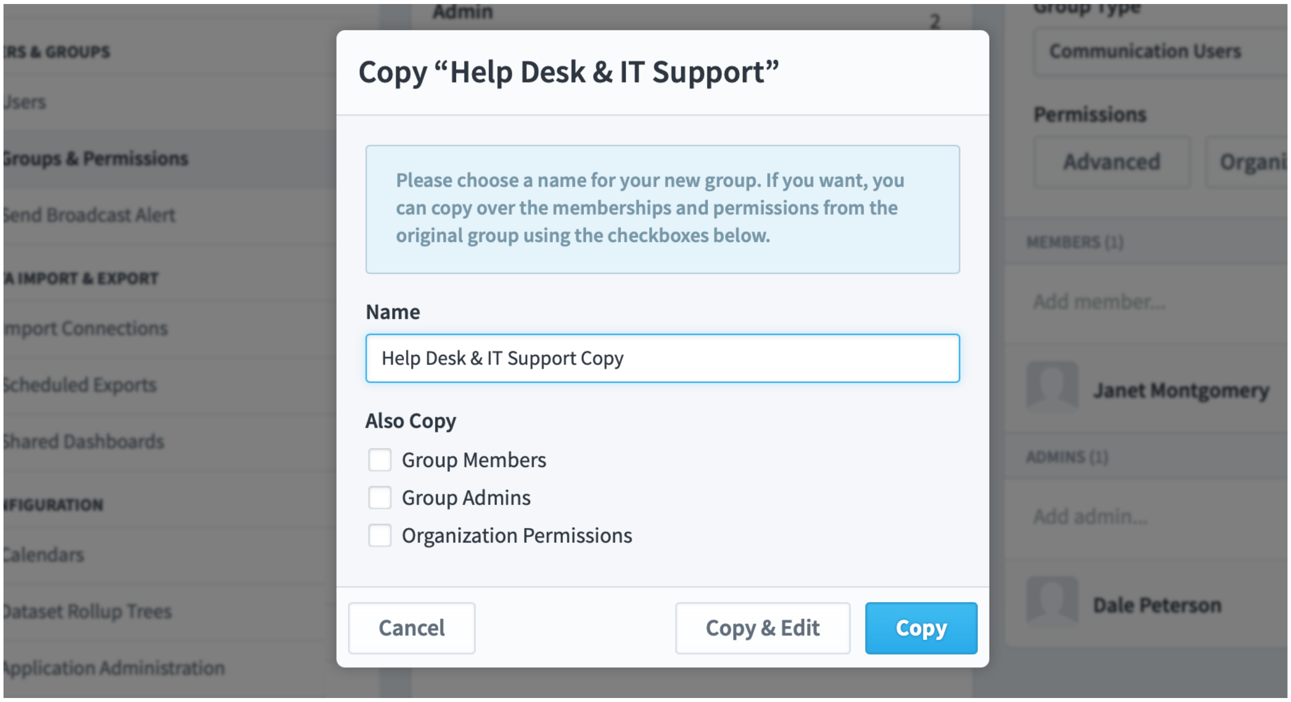


Copying Groups

You can copy a group by selecting the group and selecting the Copy button.

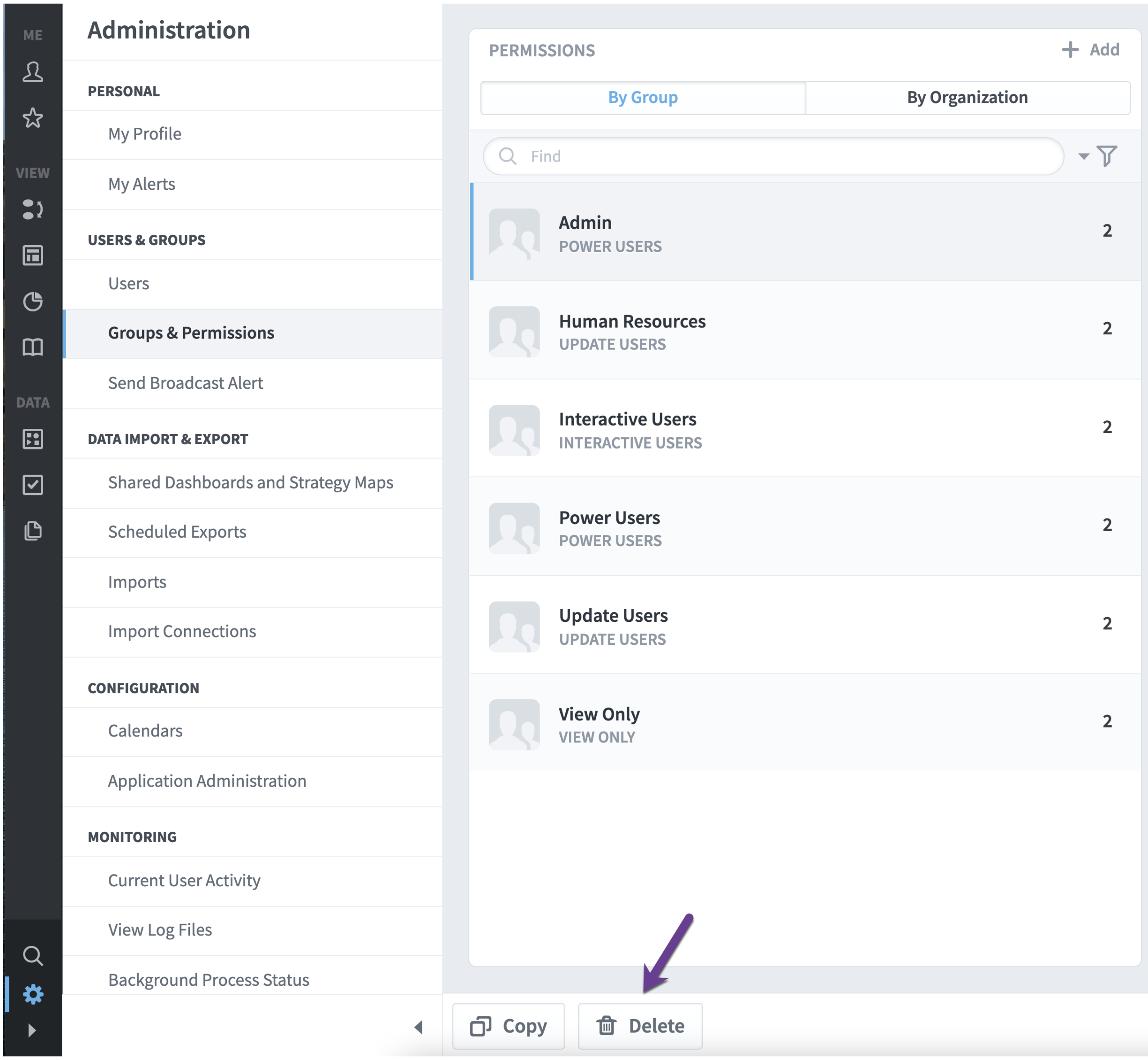


You can then rename the group, and choose whether or not to copy the original group's members, admins, and organization permissions (Advanced permissions automatically carry-over).



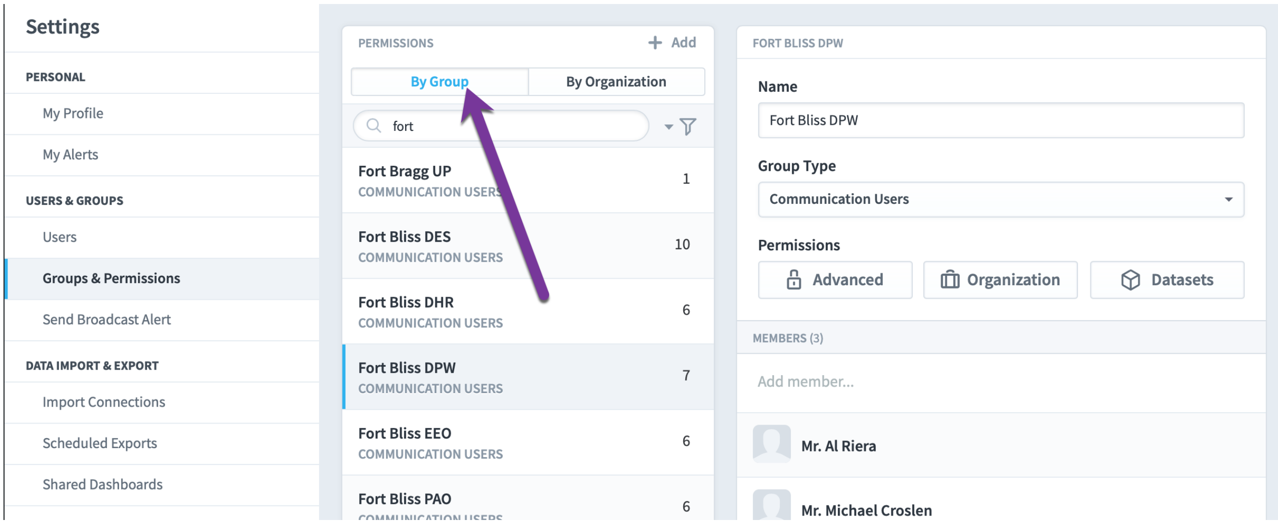
Deleting Groups

You can delete a group by selecting the group and clicking the Delete button.



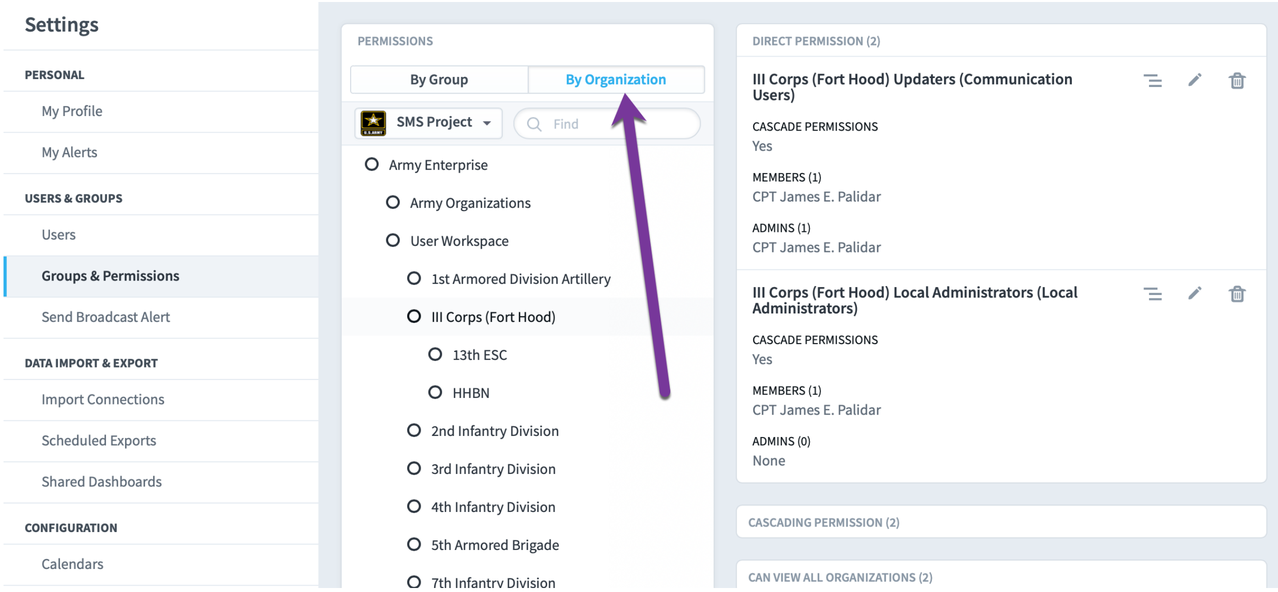
By Group vs. By Organization

You can edit a group by group or organization - the default view is "By Group".

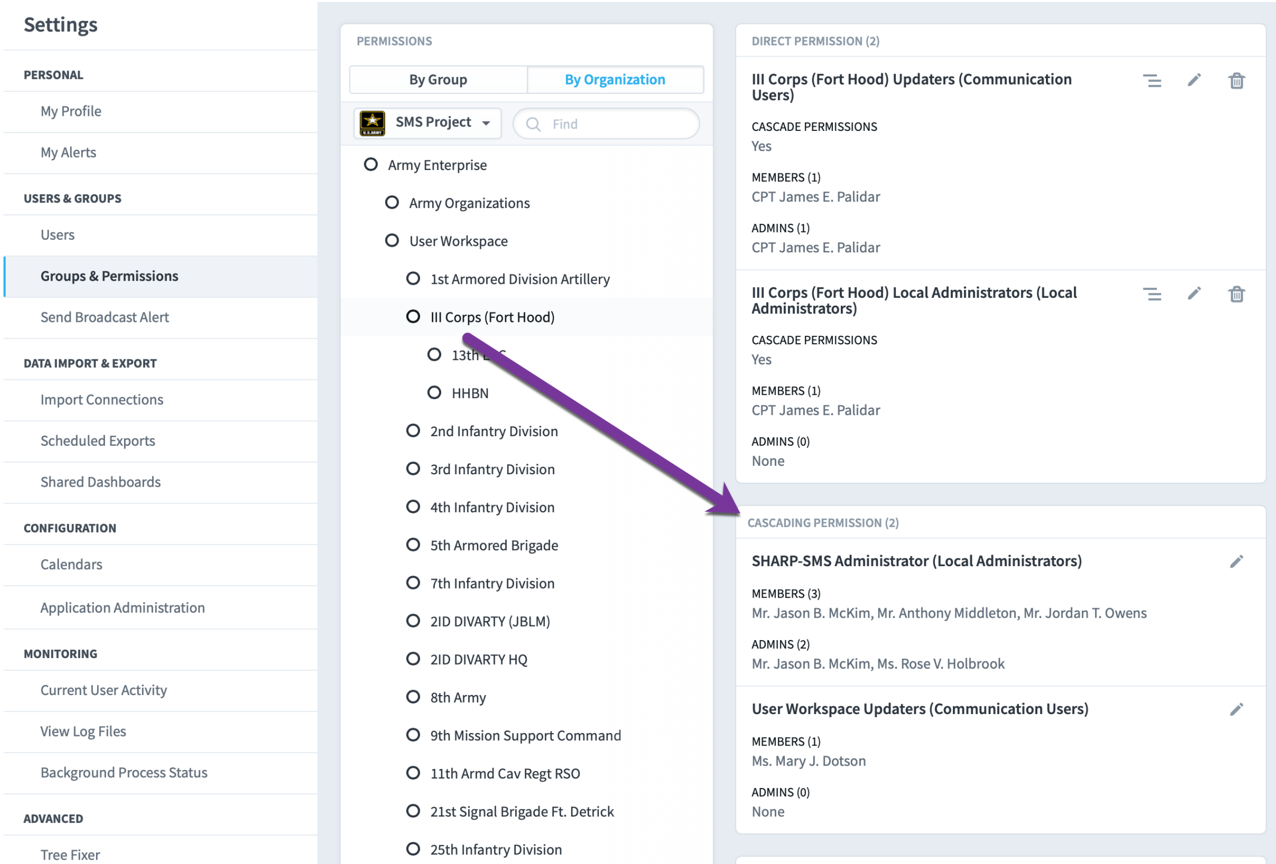


The "By Organization" view allows administrators to see all groups who can view a particular organization. The idea here is that you can choose an organization and then see exactly who has permission to view it.

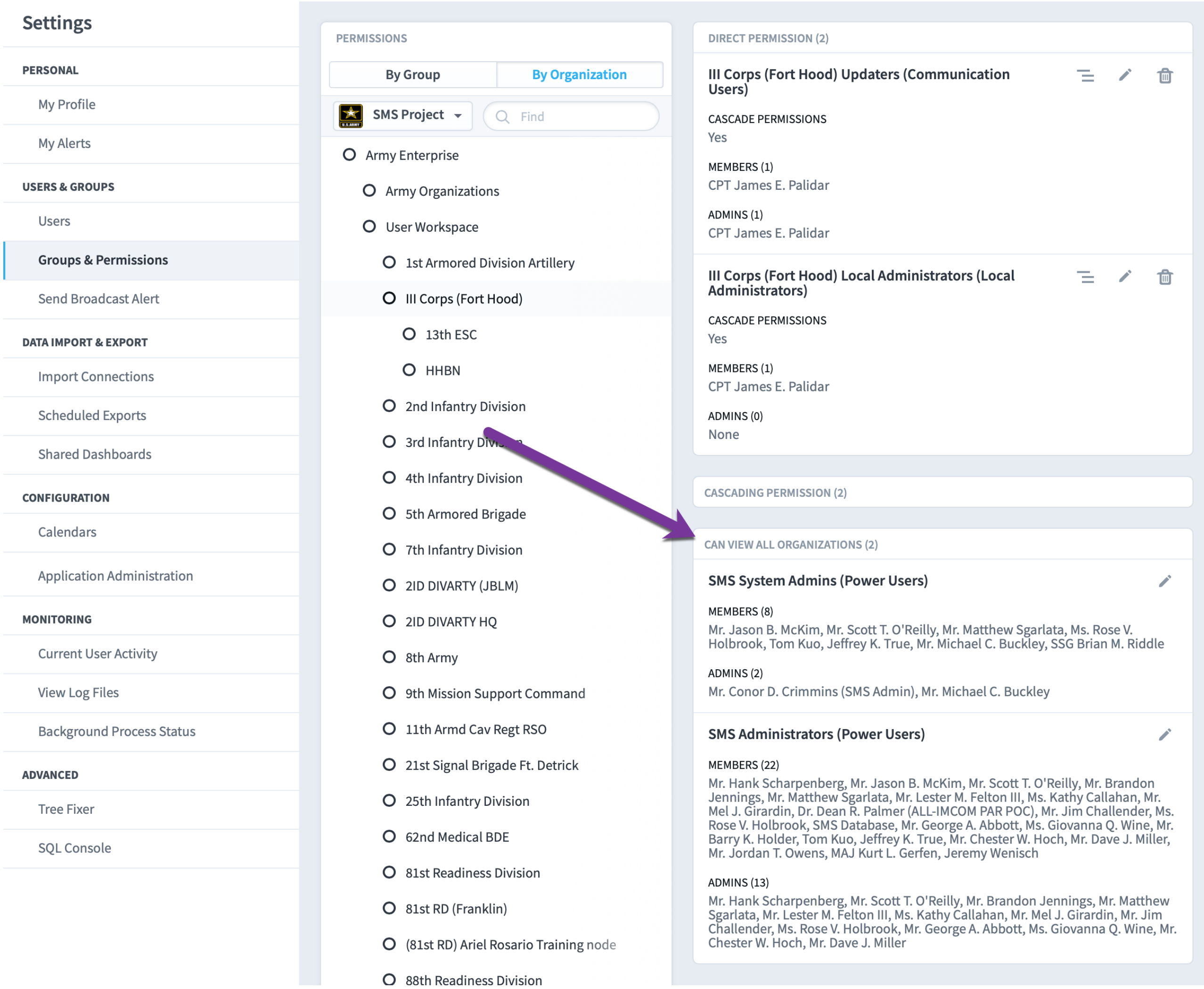
The top window on the right shows all of the groups that have "Direct Permissions" to the selected organization.



Administrators can also expand the "Cascading Permissions" box to see the groups who can see the selected organization based on permission to a higher-level organization.



Similarly, administrators can also expand the "Can View All Organizations" box to see who can view the organization based on global permissions.


Settings
PERSONAL
My Profile
My Alerts
USERS & GROUPS
Users
Groups & Permissions
Send Broadcast Alert
DATA IMPORT & EXPORT
Import Connections
Scheduled Exports
Shared Dashboards
CONFIGURATION
Calendars
Application Administration
MONITORING
Current User Activity
View Log Files
Background Process Status
ADVANCED
Tree Fixer
SQL Console
PERMISSIONS
By Group
By Organization
SMS Project
Find
Army Enterprise
Army Organizations
User Workspace
1st Armored Division Artillery
III Corps (Fort Hood)
13th ESC
HHBN
2nd Infantry Division
3rd Infantry Division
4th Infantry Division
5th Armored Brigade
7th Infantry Division
2ID DIVARTY (JBLM)
2ID DIVARTY HQ
8th Army
9th Mission Support Command
11th Armd Cav Regt RSO
21st Signal Brigade Ft. Detrick
25th Infantry Division
62nd Medical BDE
81st Readiness Division
81st RD (Franklin)
(81st RD) Ariel Rosario Training node
88th Readiness Division
DIRECT PERMISSION (2)
III Corps (Fort Hood) Updaters (Communication Users)
CASCADE PERMISSIONS
Yes
MEMBERS (1)
CPT James E. Palidar
ADMINS (1)
CPT James E. Palidar
III Corps (Fort Hood) Local Administrators (Local Administrators)
CASCADE PERMISSIONS
Yes
MEMBERS (1)
CPT James E. Palidar
ADMINS (0)
None
CASCADING PERMISSION (2)
CAN VIEW ALL ORGANIZATIONS (2)
SMS System Admins (Power Users)
MEMBERS (8)
Mr. Jason B. McKim, Mr. Scott T. O'Reilly, Mr. Matthew Sgarlata, Ms. Rose V. Holbrook, Tom Kuo, Jeffrey K. True, Mr. Michael C. Buckley, SSG Brian M. Riddle
ADMINS (2)
Mr. Conor D. Crimmins (SMS Admin), Mr. Michael C. Buckley
SMS Administrators (Power Users)
MEMBERS (22)
Mr. Hank Scharpenberg, Mr. Jason B. McKim, Mr. Scott T. O'Reilly, Mr. Brandon Jennings, Mr. Matthew Sgarlata, Mr. Lester M. Felton III, Ms. Kathy Callahan, Mr. Mel J. Girardin, Dr. Dean R. Palmer (ALL-IMCOM PAR POC), Mr. Jim Challender, Ms. Rose V. Holbrook, SMS Database, Mr. George A. Abbott, Ms. Giovanna Q. Wine, Mr. Barry K. Holder, Tom Kuo, Jeffrey K. True, Mr. Chester W. Hoch, Mr. Dave J. Miller, Mr. Jordan T. Owens, MAJ Kurt L. Gerfen, Jeremy Wenisch
ADMINS (13)
Mr. Hank Scharpenberg, Mr. Scott T. O'Reilly, Mr. Brandon Jennings, Mr. Matthew Sgarlata, Mr. Lester M. Felton III, Ms. Kathy Callahan, Mr. Mel J. Girardin, Mr. Jim Challender, Ms. Rose V. Holbrook, Mr. George A. Abbott, Ms. Giovanna Q. Wine, Mr. Chester W. Hoch, Mr. Dave J. Miller