Spider Strategies

Getting Started in Spider Impact™

Spider Impact 5.8 Quick Start Guide
Updated October 29th, 2025

Table of Contents

I. Your success is important to us! 3
II. Scorecards 4
Overview of Scorecards 4
Scorecard Building Basics 10
III. Dashboards 23
Building Dashboards 23
IV. Initiatives 47
Overview of Initiatives 47
V. Charts 54
Overview of Charts 54
VI. Datasets 62
Overview of Datasets 62
VII. Forms 67
Overview of Forms 67
VIII. Reports 96
Overview of Reports 96
IX. Impact Intelligence 104
Overview of Impact Intelligence 104
X. General 113
No-Code Apps 113
XI. Application Administration 122
Choosing Terminology and Methodology 122
Users 125
Groups 131

Your success is important to us!

Spider Impact is industry-leading performance management software that powers data visualization, balanced scorecards, team alignment, business intelligence, 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.

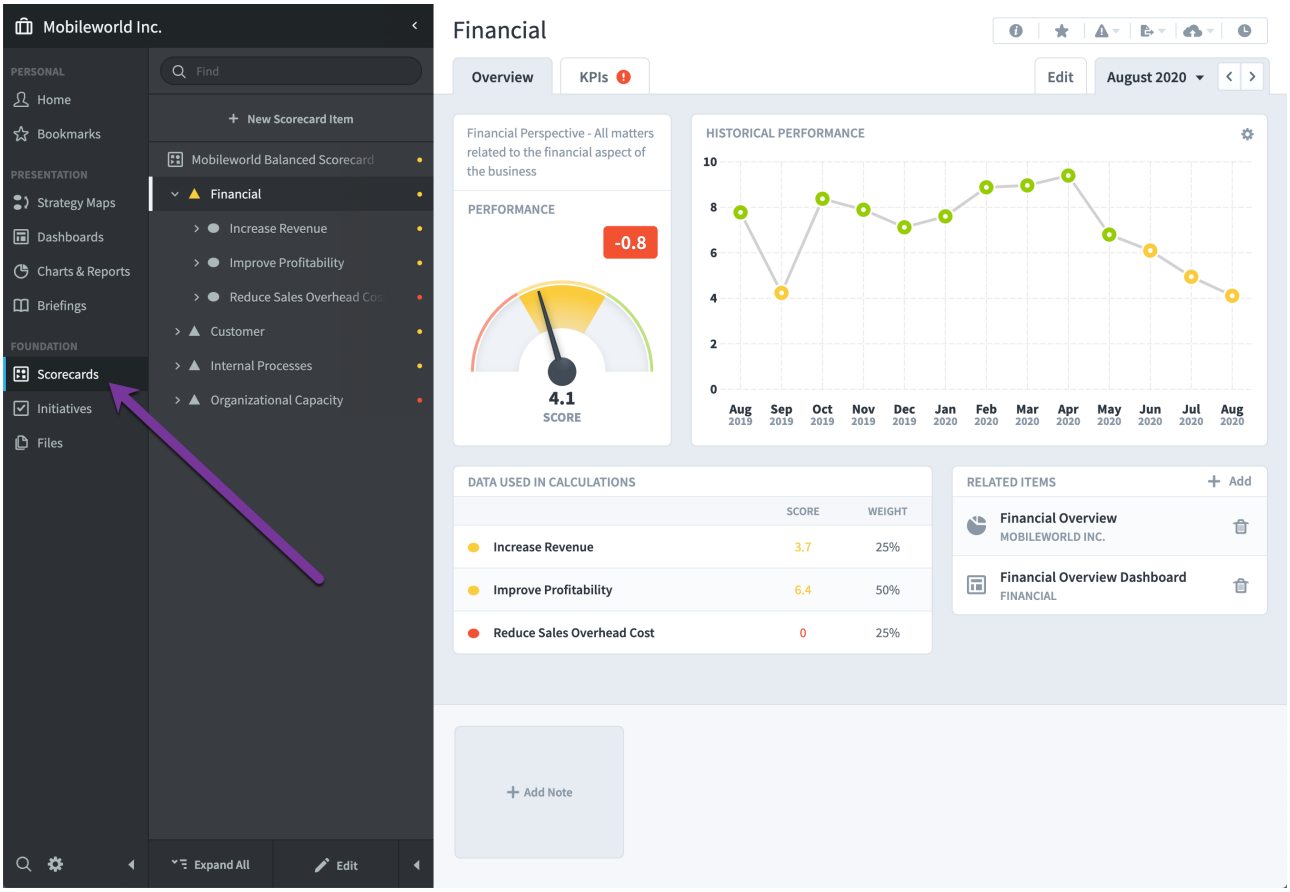
If you want to maximize your return on investment, we offer paid formal training courses and dedicated consulting engagements. Most of our customers prefer the flexibility of contracting for remote (web-based) assistance, but we also have on-site services available if they're a better match for your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

Scorecards

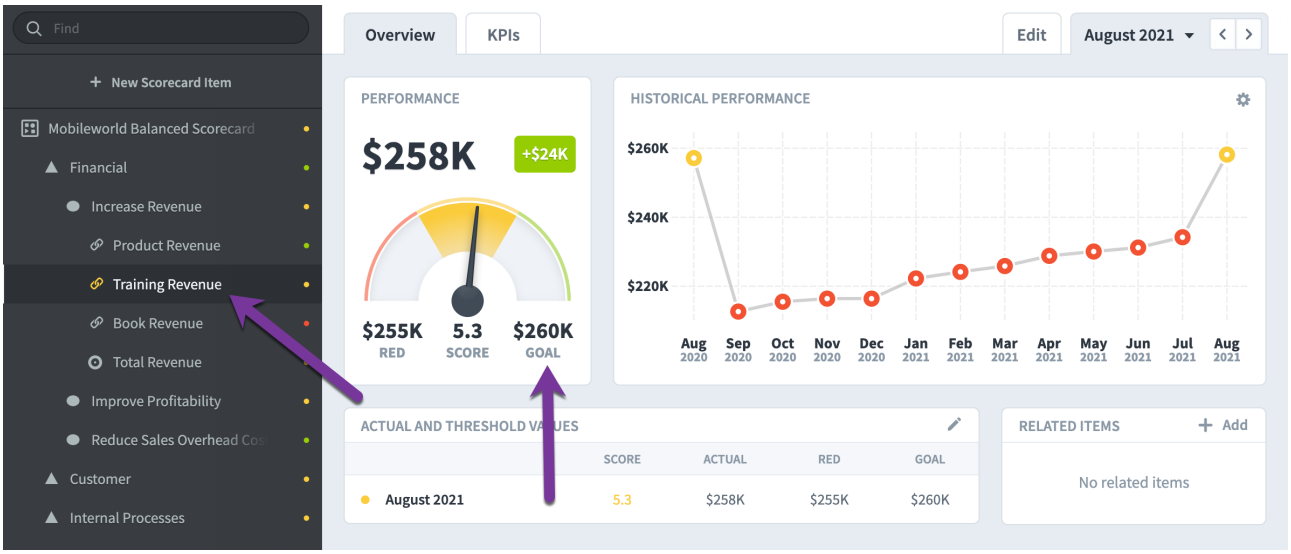
Overview of Scorecards

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.

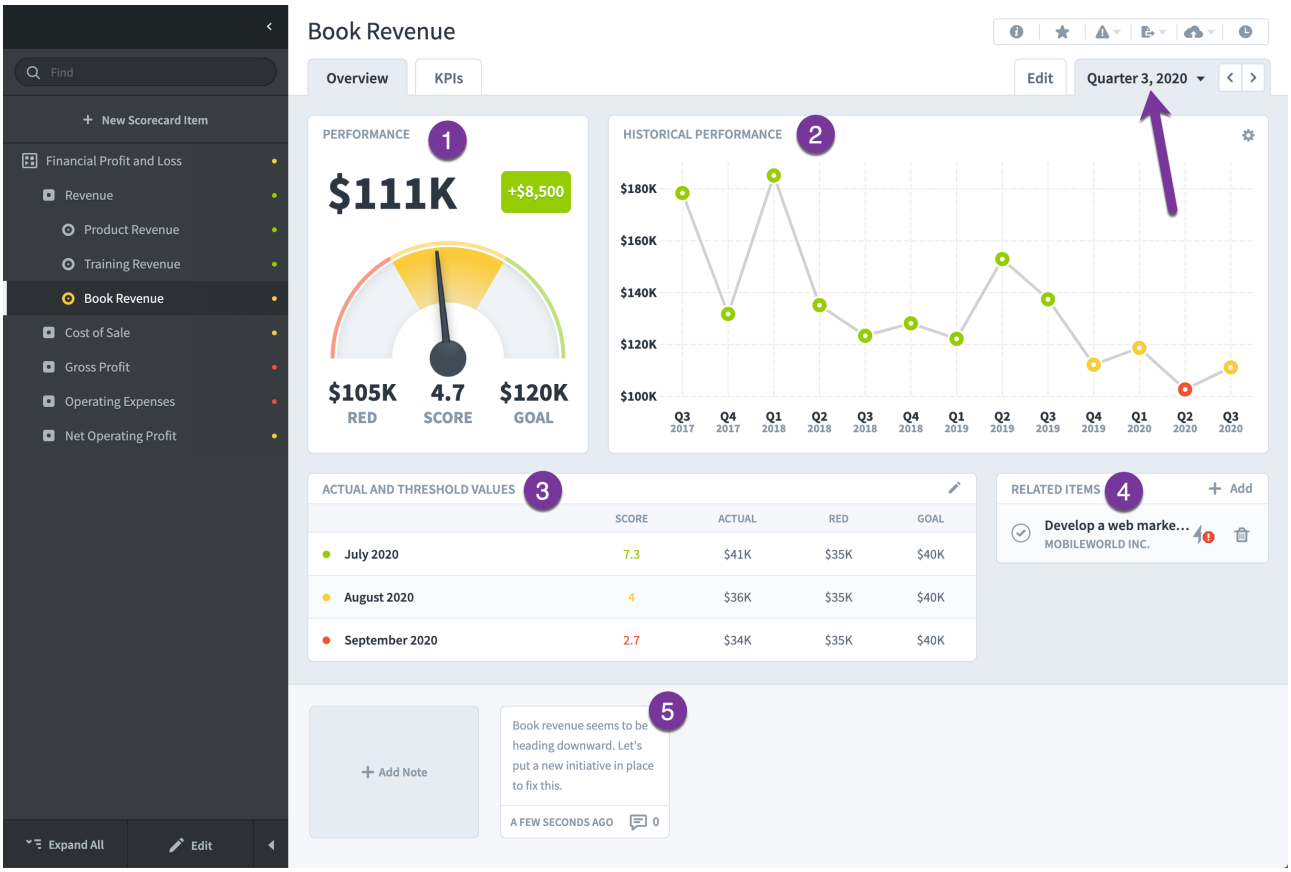


All of those KPI scores are then rolled up the tree to give scores to your higher-level strategic scorecard items. In this example, the score from this *Training Revenue* KPI is combined with other similar KPI scores to give the *Increase Revenue* objective a score. That objective score is then rolled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

For more information about how Spider Impact calculates scores, see the How Scores are Calculated article.

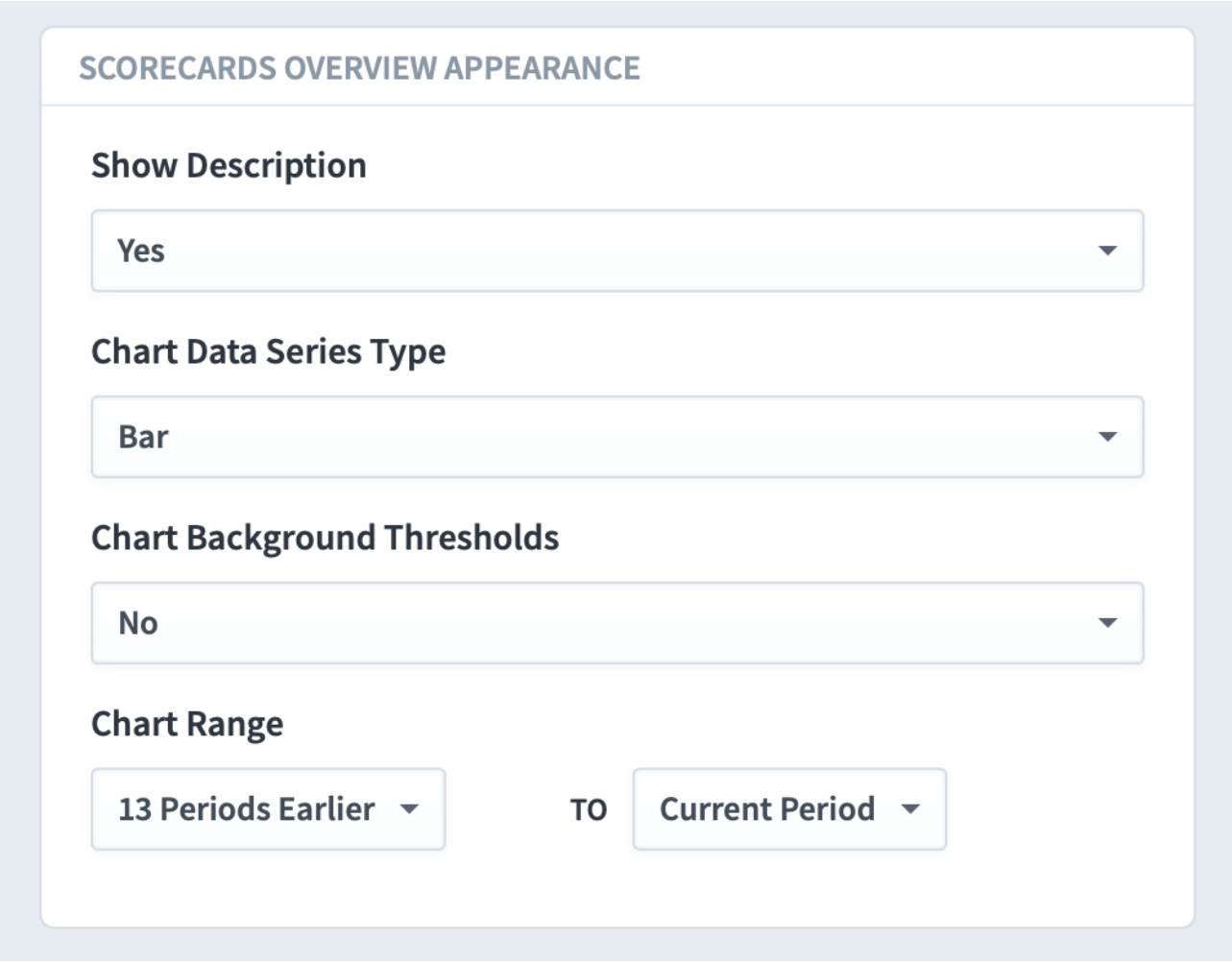
Overview Tab

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.

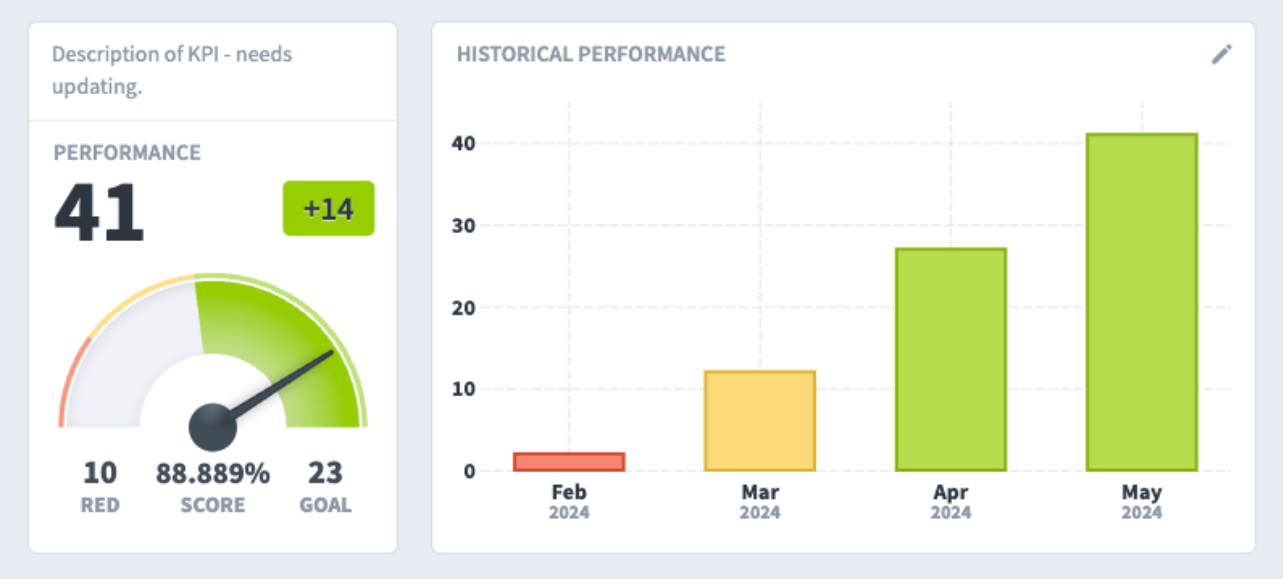


1. The speedometer shows the performance for the current calendar period (purple arrow). In this example we're looking at a KPI and we can see its actual value, goal, and how much it has changed since the previous period.
2. The historical performance chart shows how this KPI has changed over time. You 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.

There settings in Application Administration that allow you to configure the default appearance of the Scorecards Overview tab.

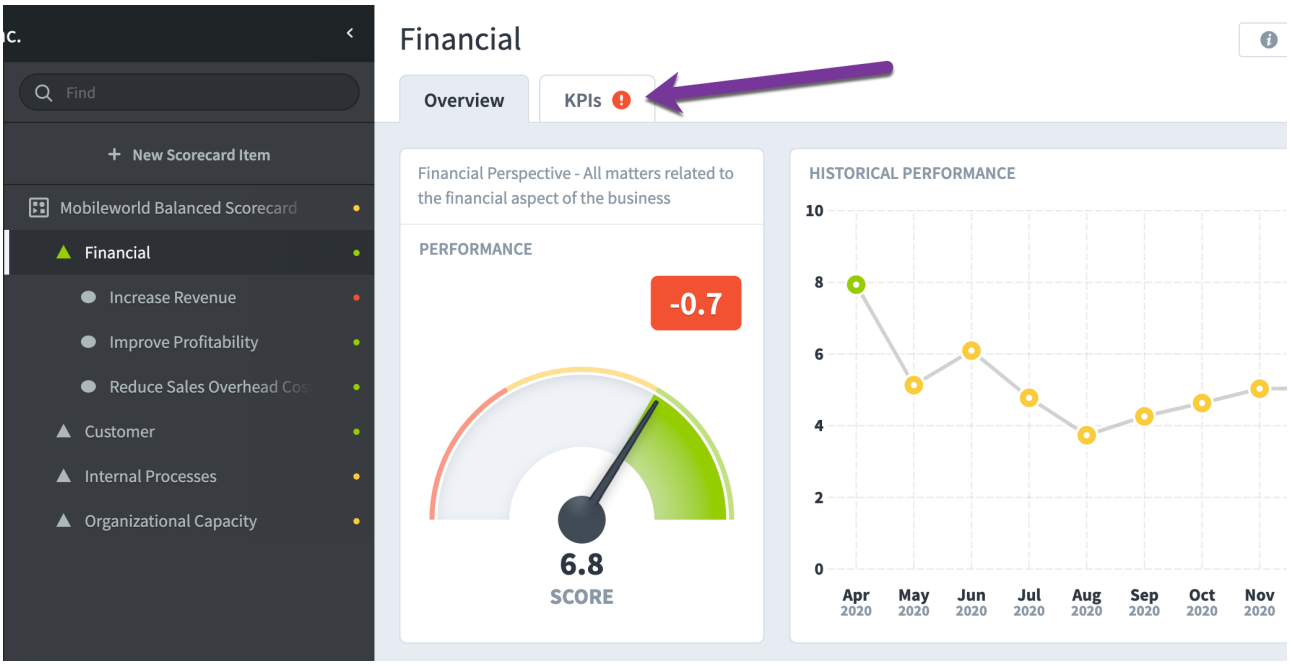


In this example we've set the description to show, and we're charting 4 periods on a bar chart with no background thresholds.

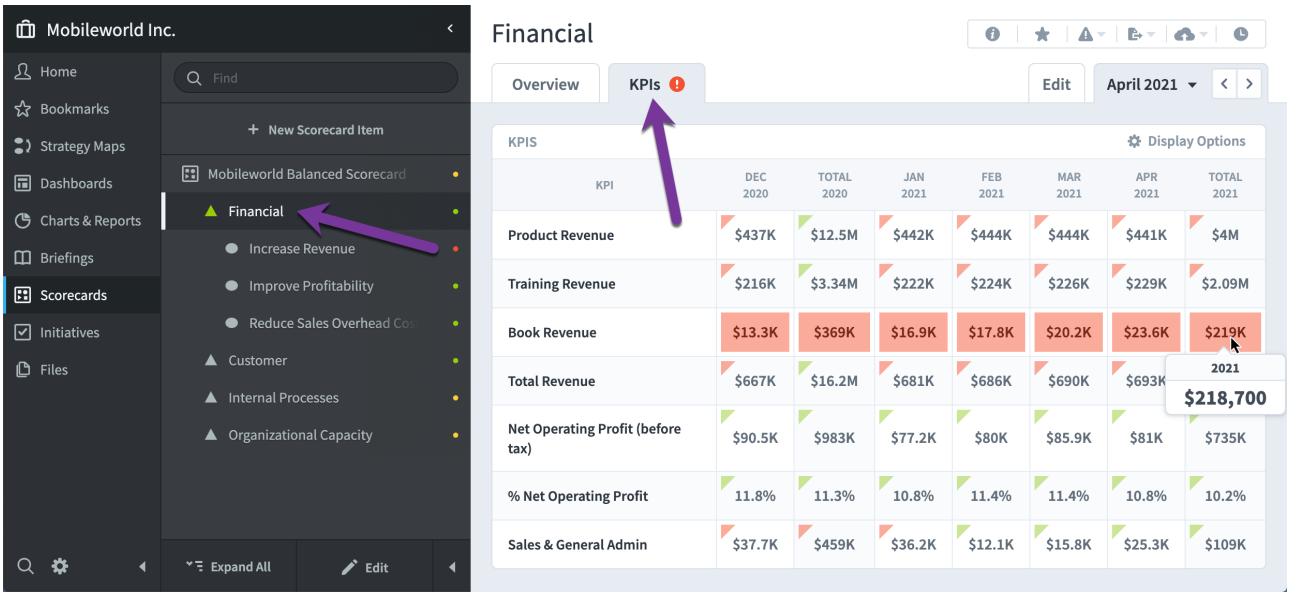


KPIs (or Measures) Tab

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.



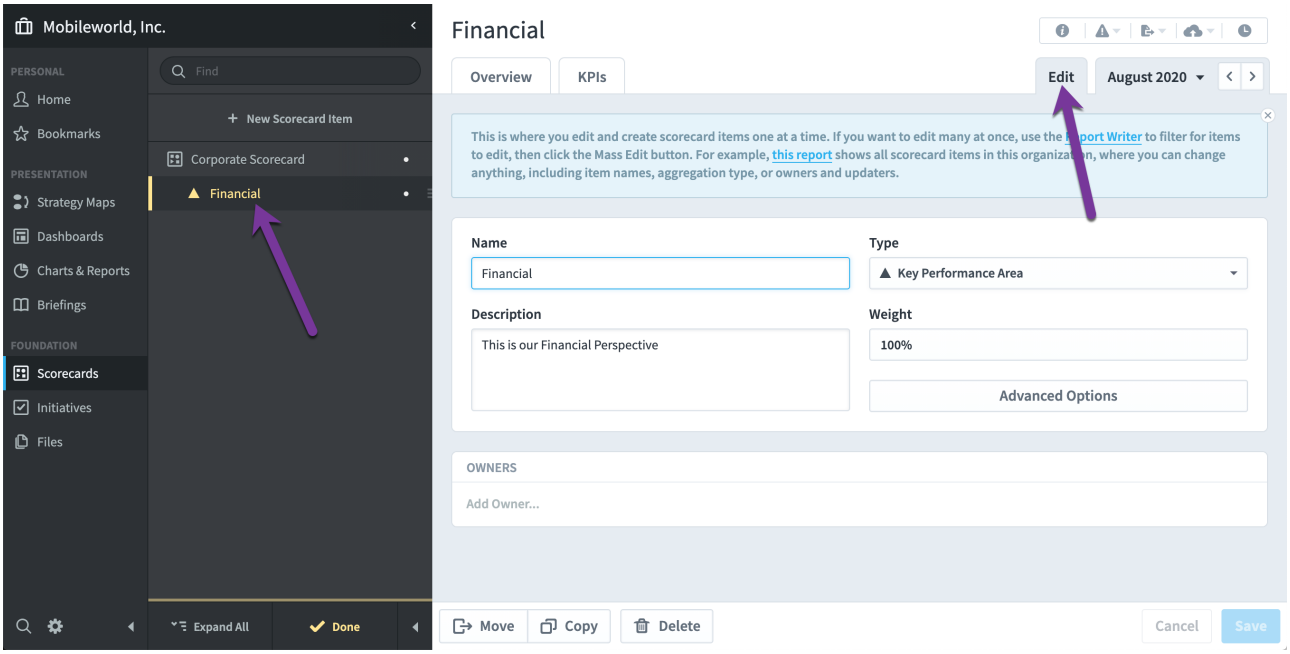
By default, any KPI below a score of 3.3 will trigger the red icon, but you can configure or disable this threshold in the Scorecards panel of Application Administration.



Scorecard Building Basics

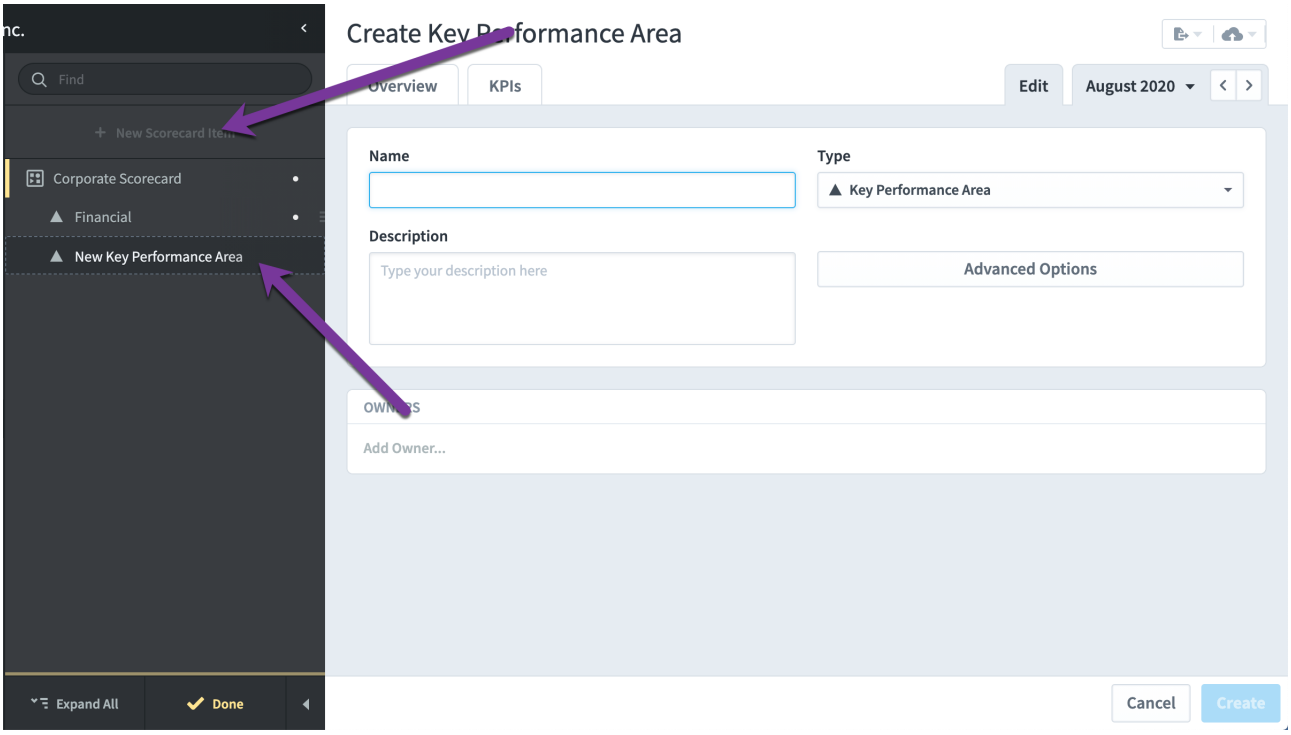
Editing Scorecard Items

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

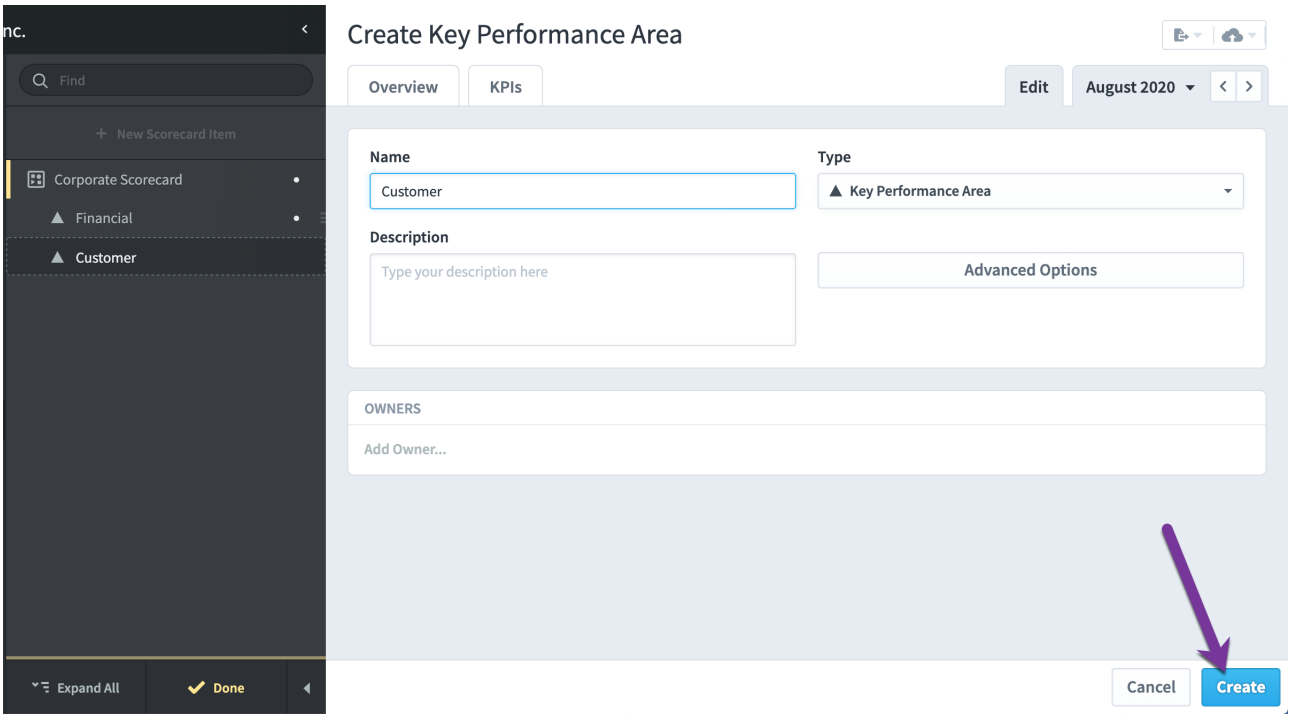


Creating New Scorecard Items

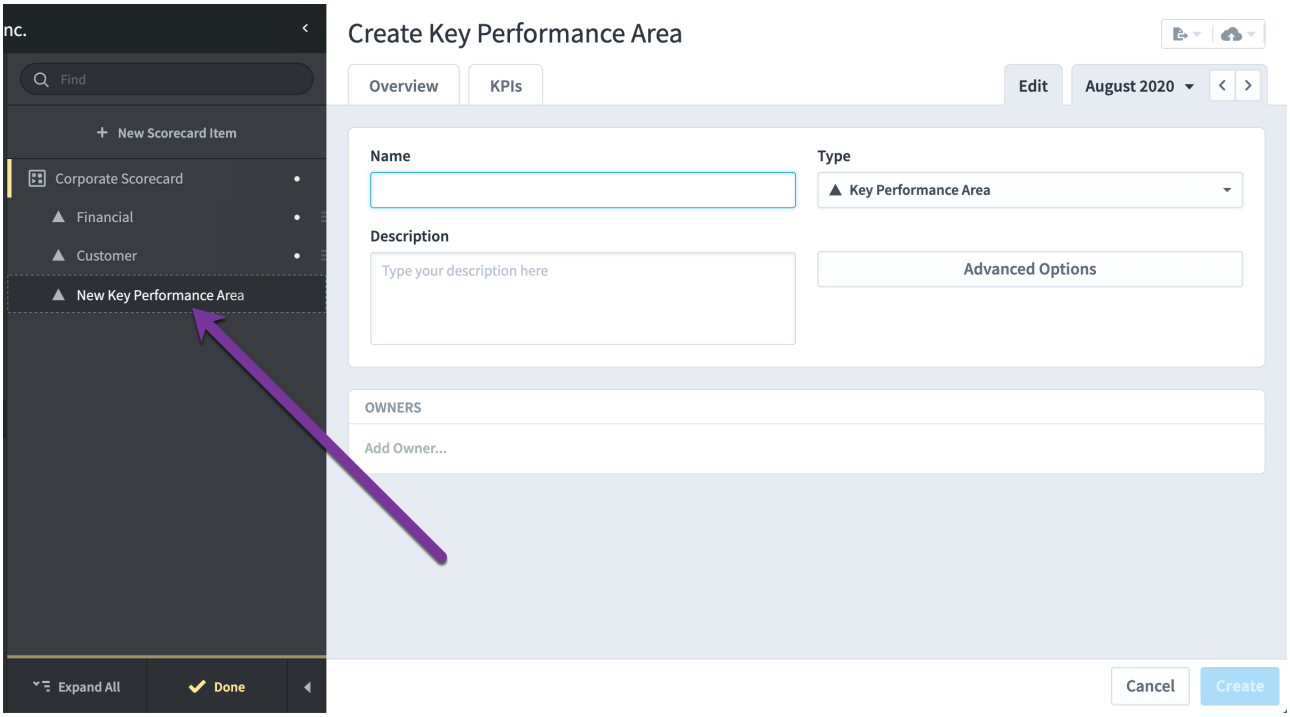
To create a new scorecard item, select its parent in the tree and click the New Scorecard Item button. This will put a placeholder for the new item in the tree and you can start filling out the form.



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



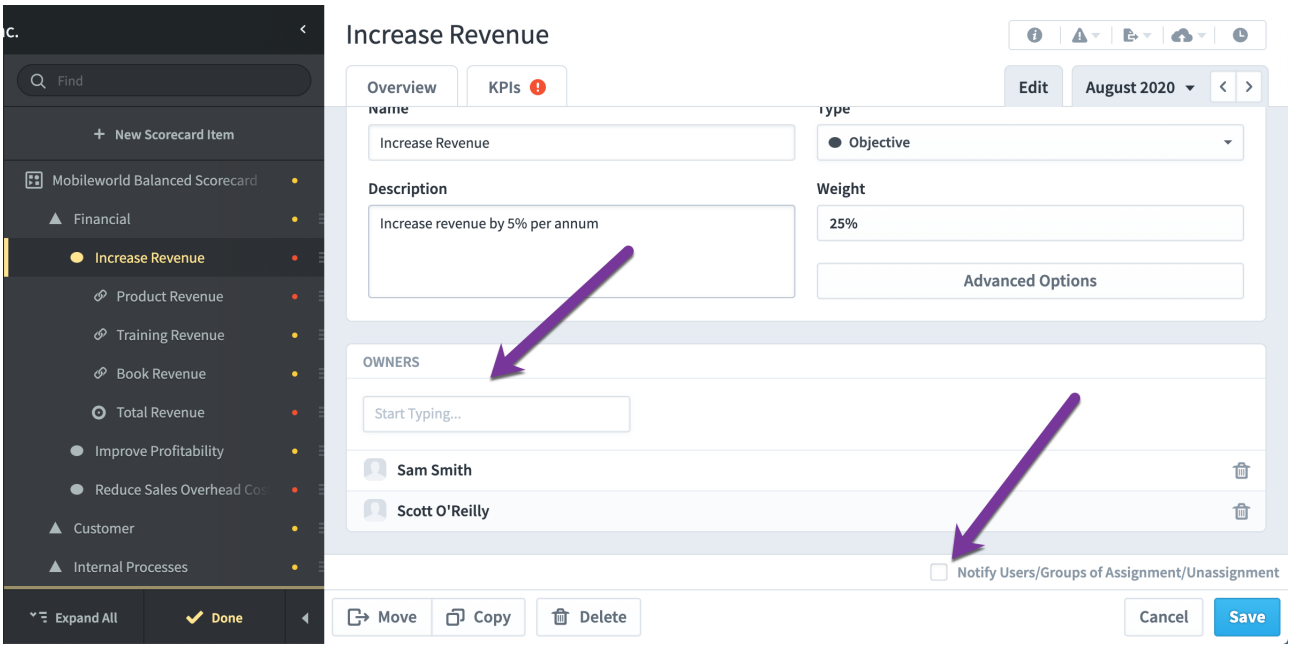
Not only does this save your scorecard item, but it also automatically moves on to creating the next scorecard item in the list.



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.

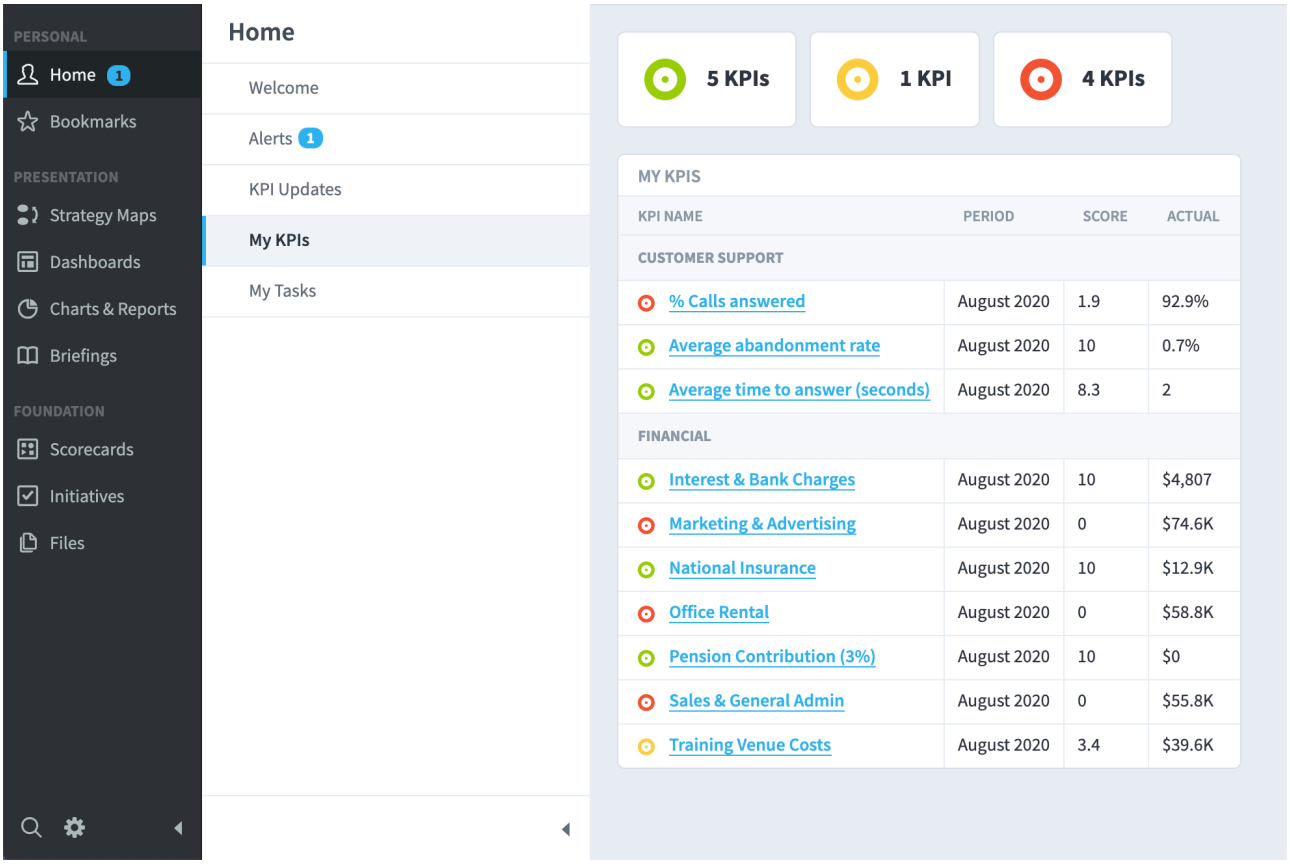
Assigning Owners

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.

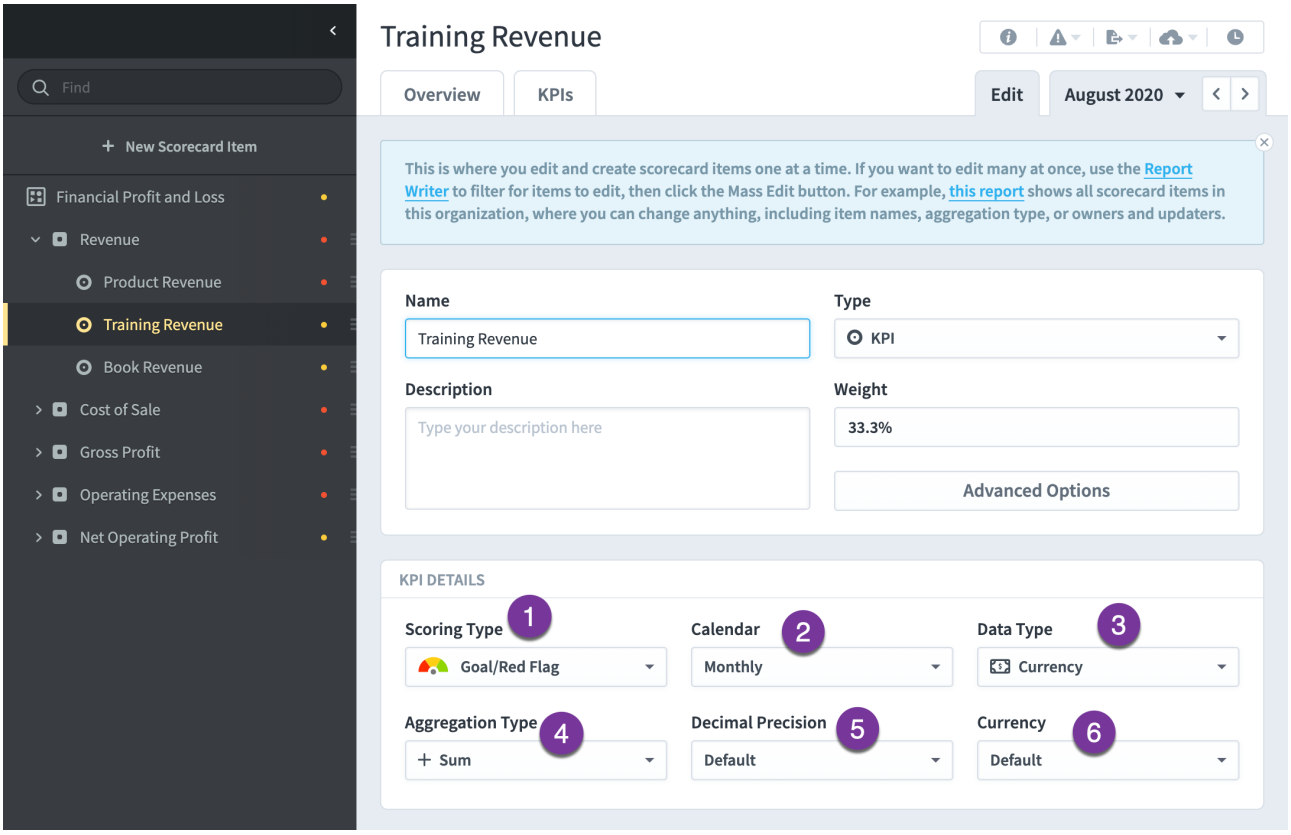
It's also helpful for the owners because they'll know exactly what they're responsible for. They're able to see a list of all KPIs they own in the Home section.



KPI (or metric) Details

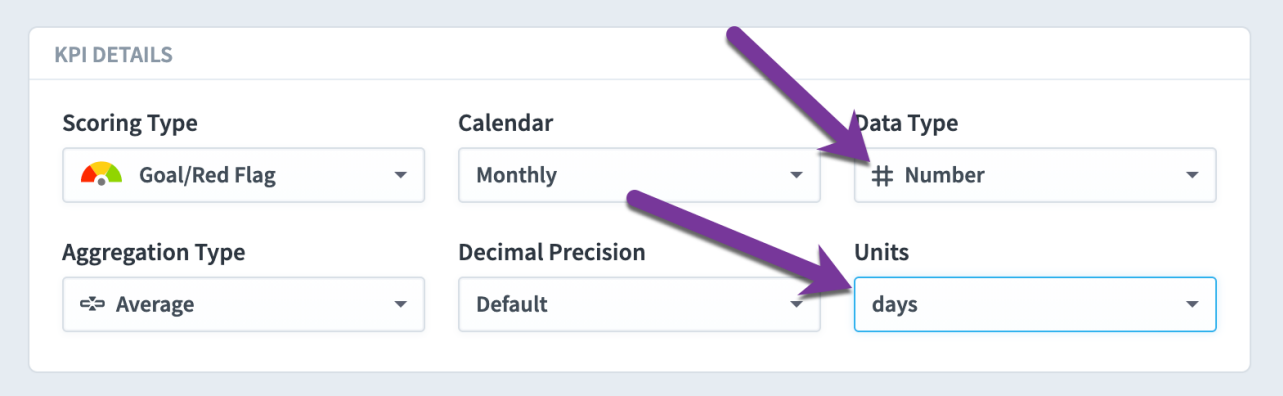
KPIs *(or metrics if you're using balanced scorecard language)* are a little more complicated than other types of scorecard items. The good news is that all of the default KPI settings work wonderfully. Most of the time you can just give your KPI a name, an owner, and a couple threshold values. If you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

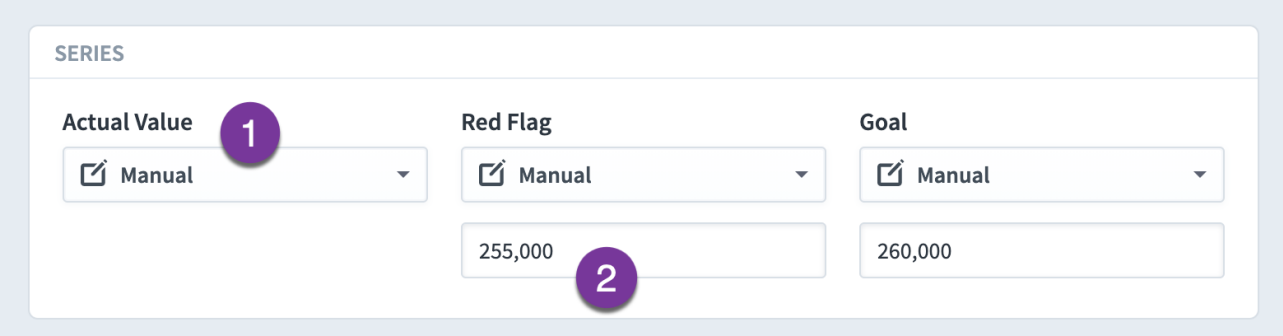
When you choose *Number* for the data type, you also have the ability to specify a unit of measurement if you've configured *Units* in the Application Administration section.



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:

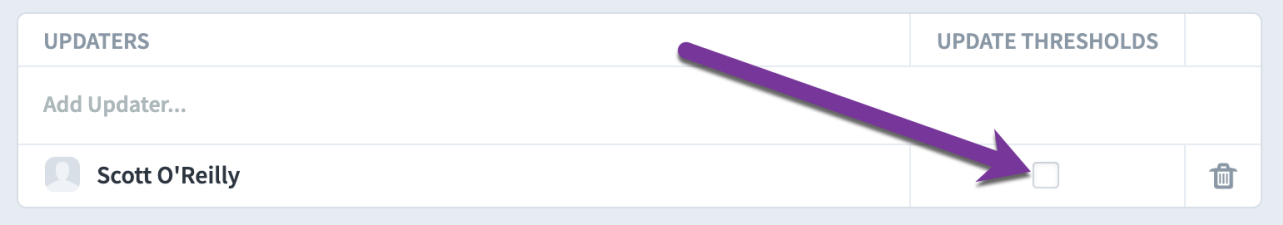


1. Every series has an update type. It defaults to manual, but you can also choose Calculated or Template Rollup. Please see the Calculated KPIs article for more information.

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.

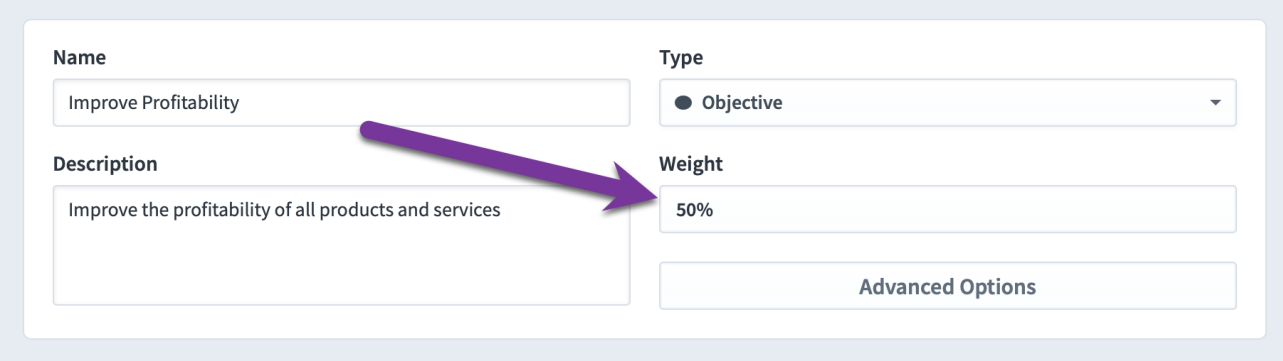
KPI Updaters

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.



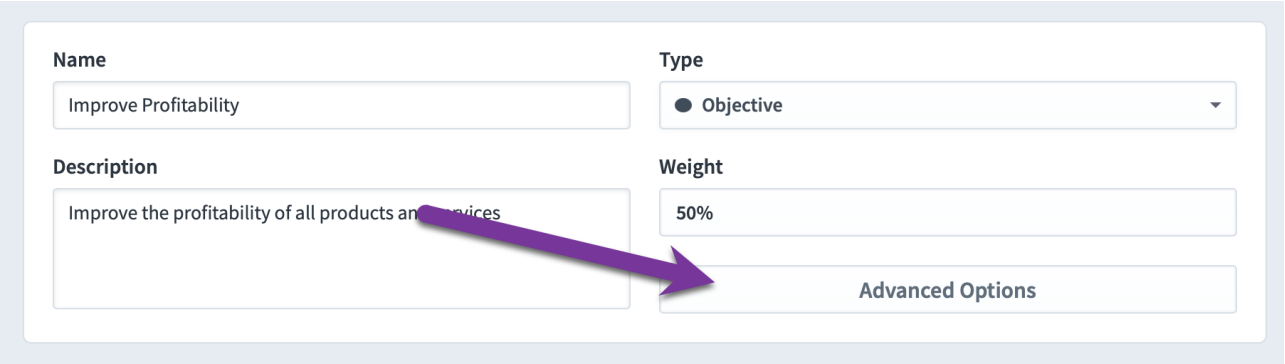
Weight

By default all scorecard items are weighted equally for scoring. You can adjust these weights to reflect different priorities, which is covered in the Score Weighting article.

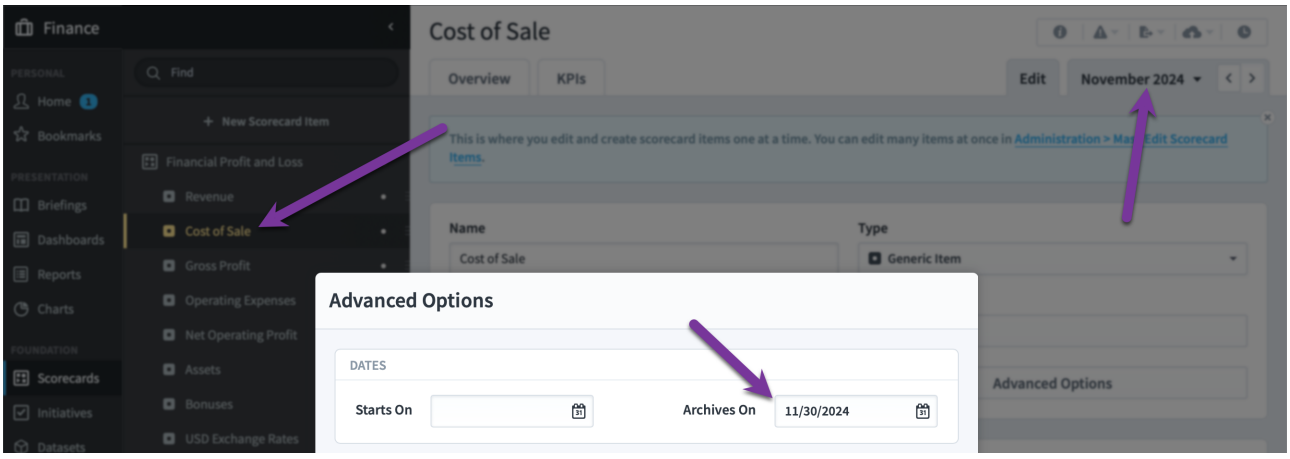


Start and Archive Dates

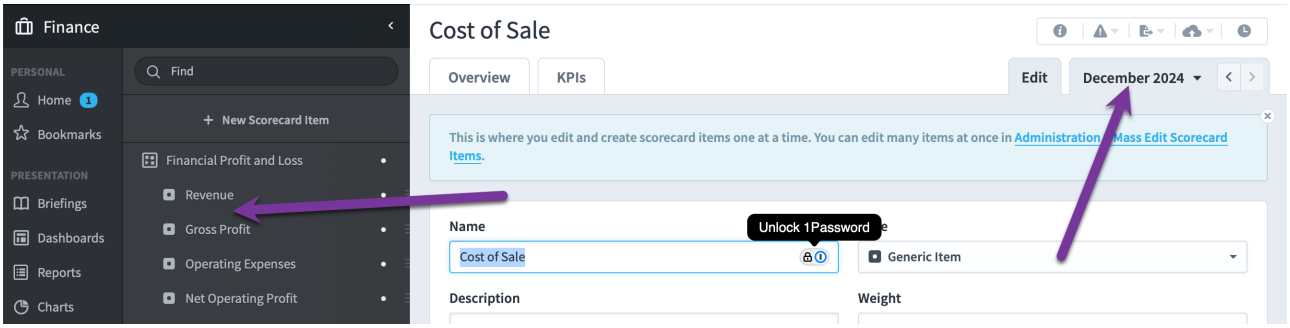
To set Start or Archive dates, click on a scorecard item's Advanced Options button.



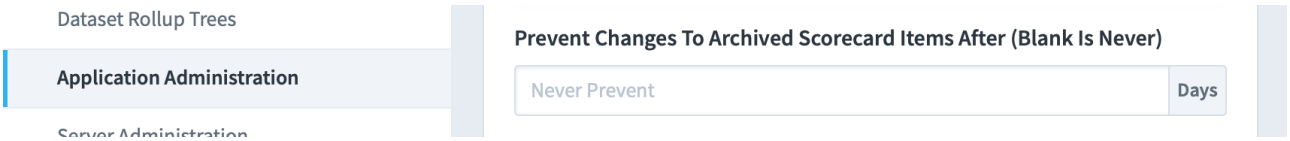
By default, scorecard items appear for all time. In this example, however, we've set the Cost of Sale scorecard item to archive at the end of November 2024. As you can see, it still appears in the tree in November.



But, when we switch to December, it no longer appears. These start and archive dates allow your scorecards to change over time while still maintaining an accurate performance history.

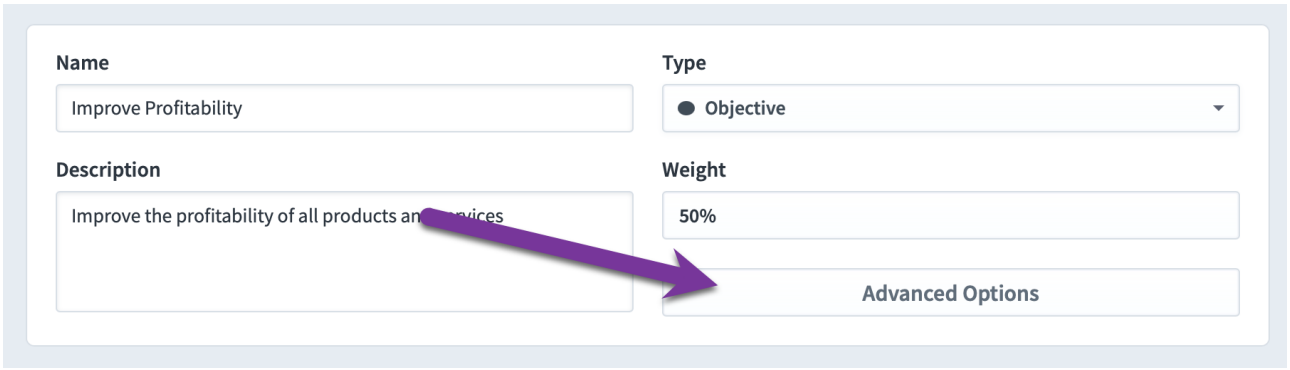


If you want to lock in archived scorecard items so they can't be changed after they're archived, there is a setting in the Scorecards pane of Application Administration.

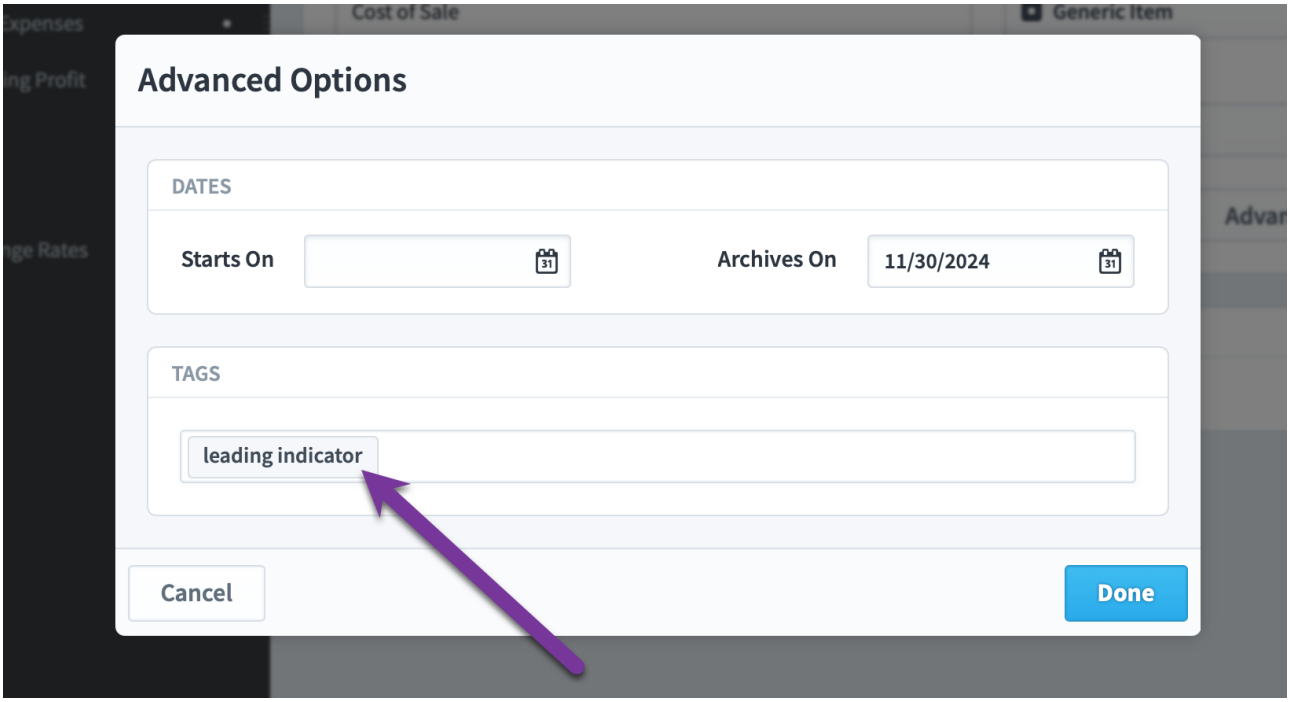


Tags

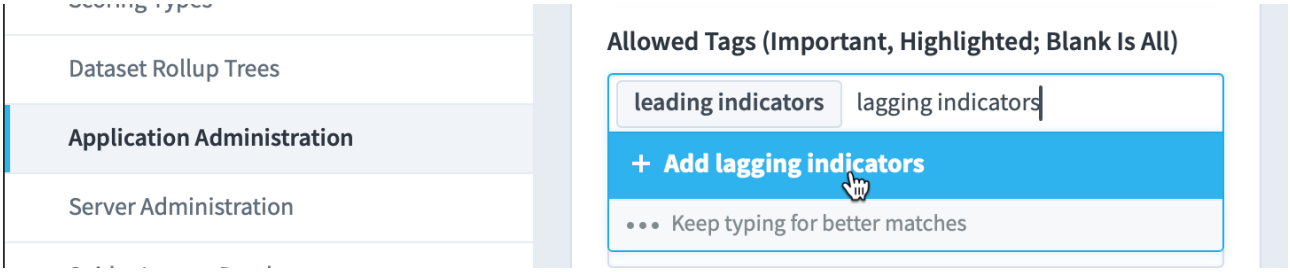
To set tags, click on a scorecard item's Advanced Options button.



Here you can tag scorecard items with attributes that you can report on. In this example we're designating some KPIs as leading indicators so that we can write a report showing all red leading indicators.

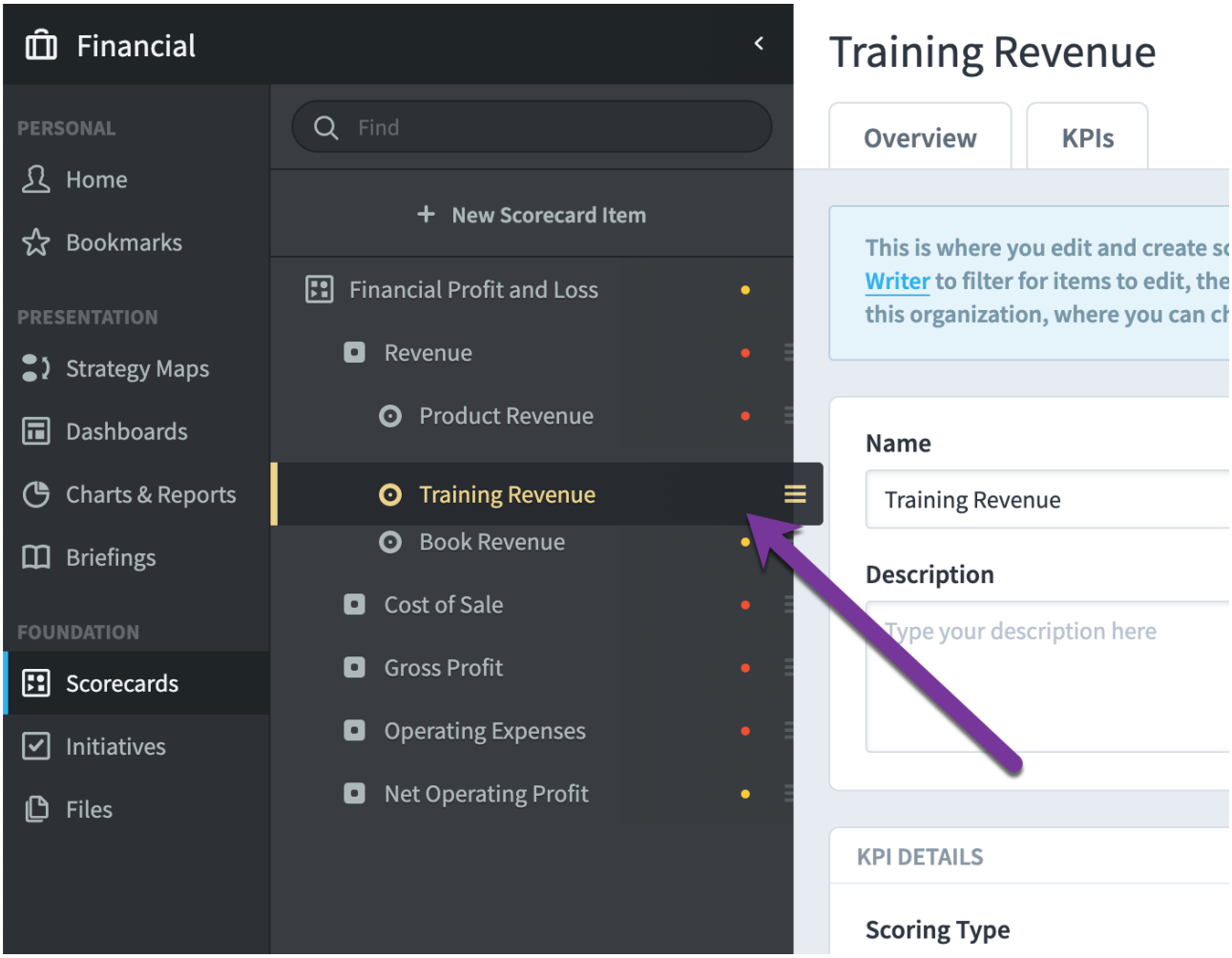


If you want to restrict the tags that people are able to use, you can define them in the Data Format panel in Application Administration.



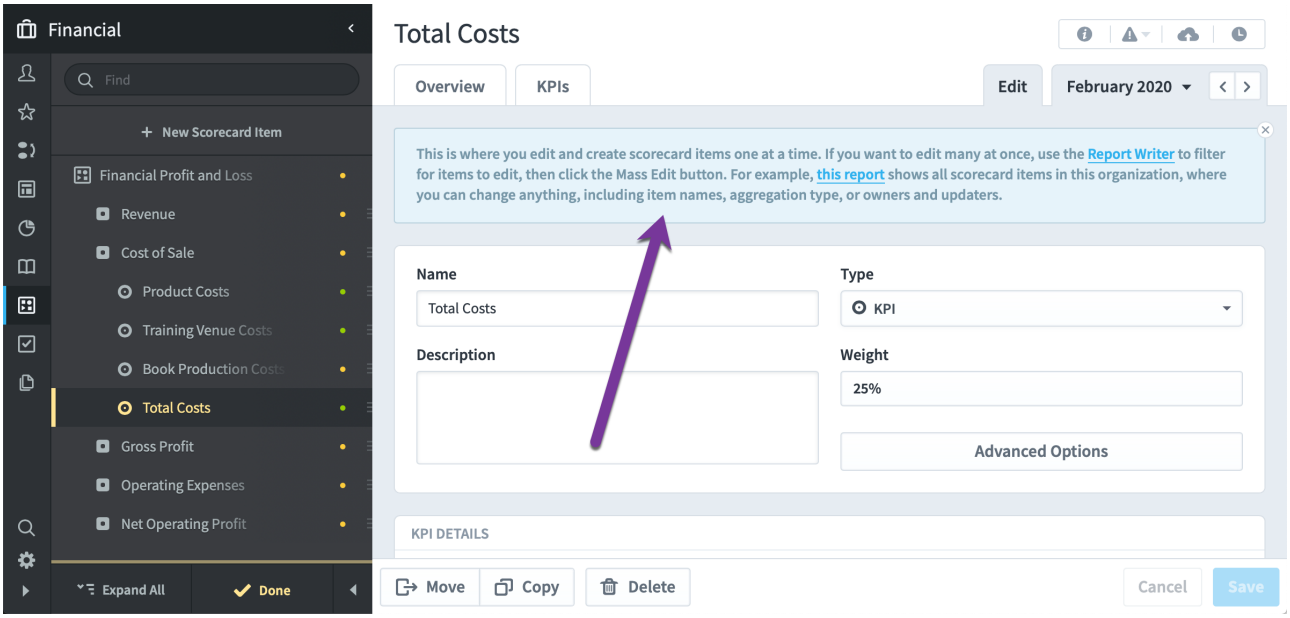
Rearranging the Tree

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.

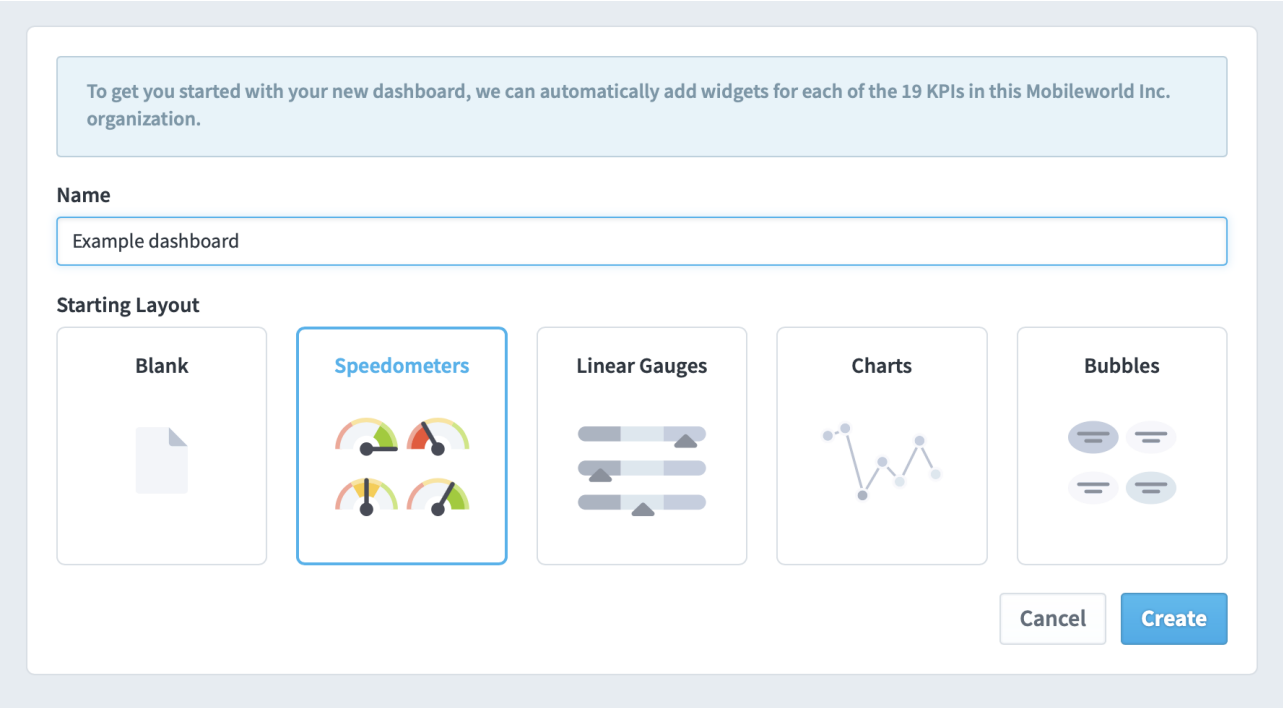

Financial
Find
New Scorecard Item
Financial Profit and Loss
Revenue
Cost of Sale
Product Costs
Training Venue Costs
Book Production Costs
Total Costs
Gross Profit
Operating Expenses
Net Operating Profit
Expand All
Done
Total Costs
Overview
KPIs
Edit
February 2020
This is where you edit and create scorecard 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

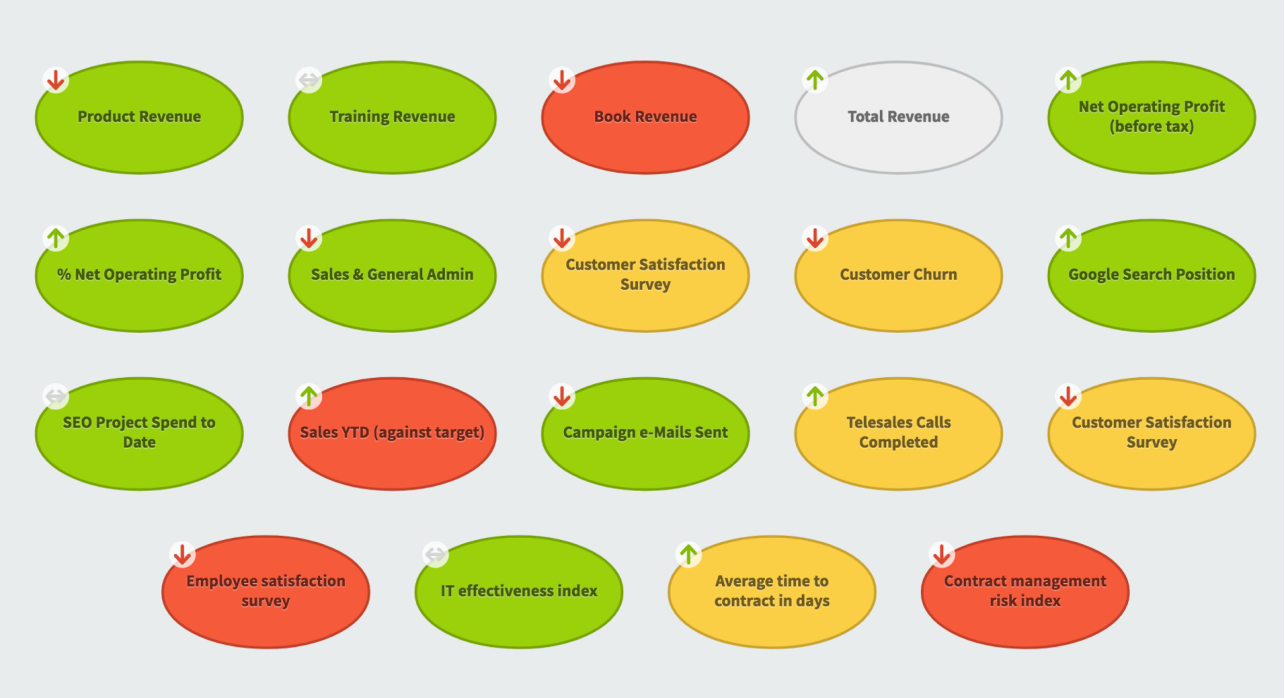
New dashboards default to Blank, but you also have the option to automatically add widgets for each KPI in the organization. This can be a great starting point for building KPI dashboards.



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.

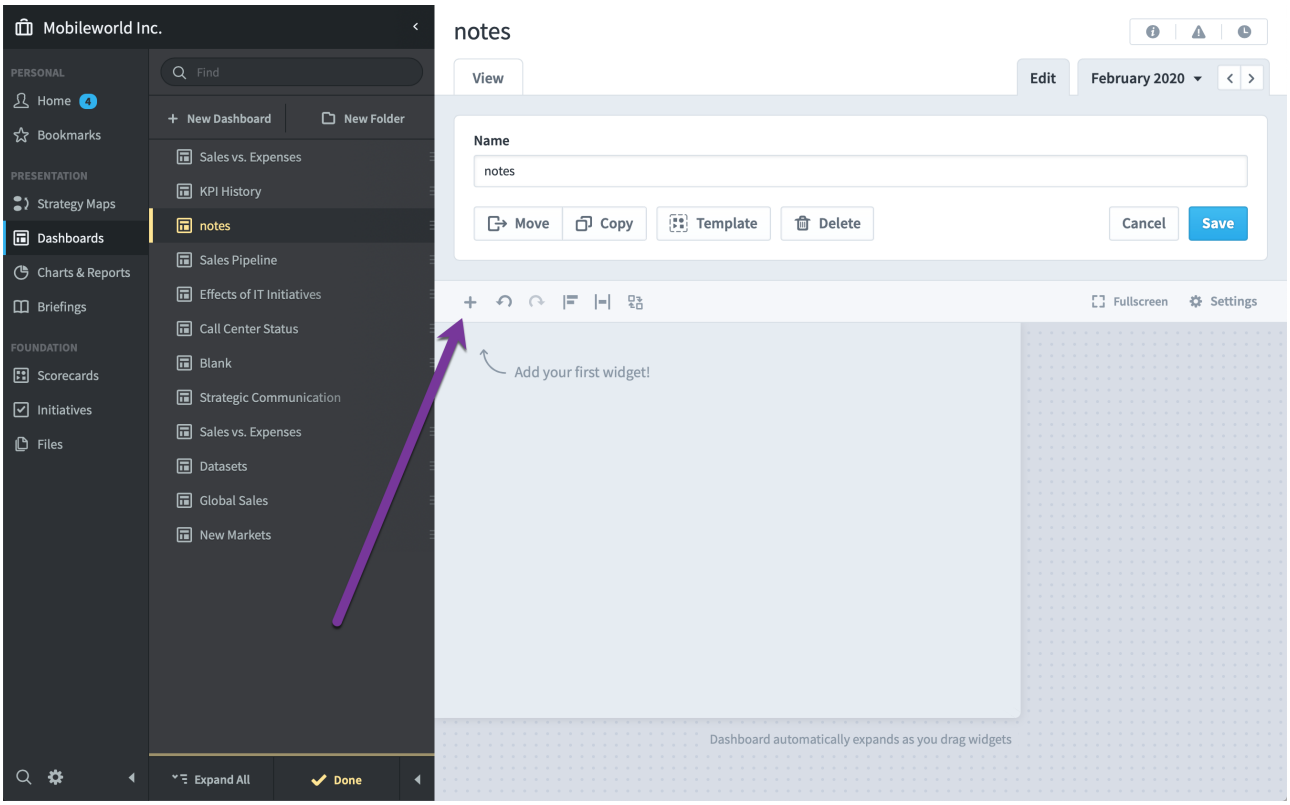


This is what the dashboard would have looked like if we had chosen bubbles.

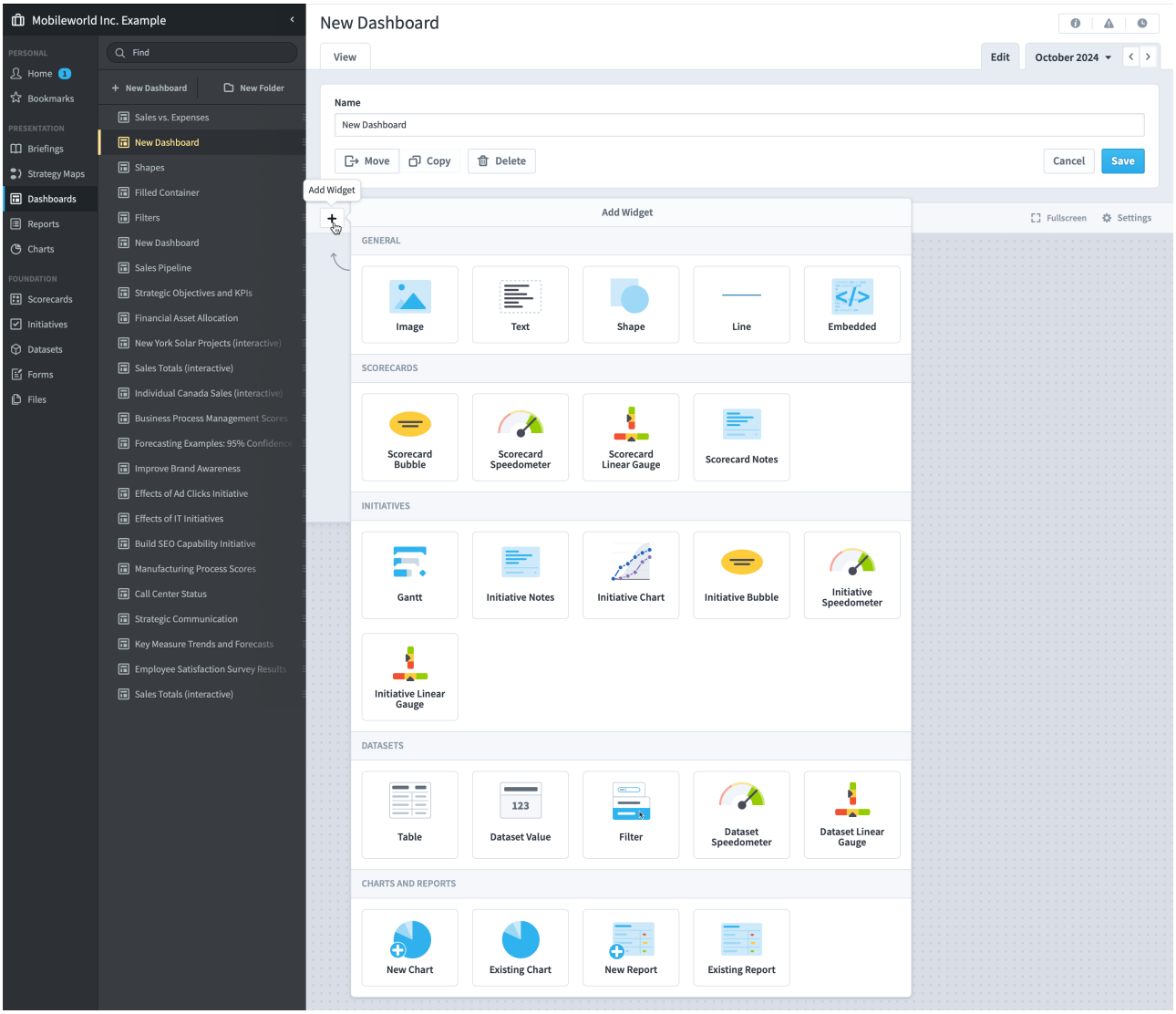


Adding Widgets

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.



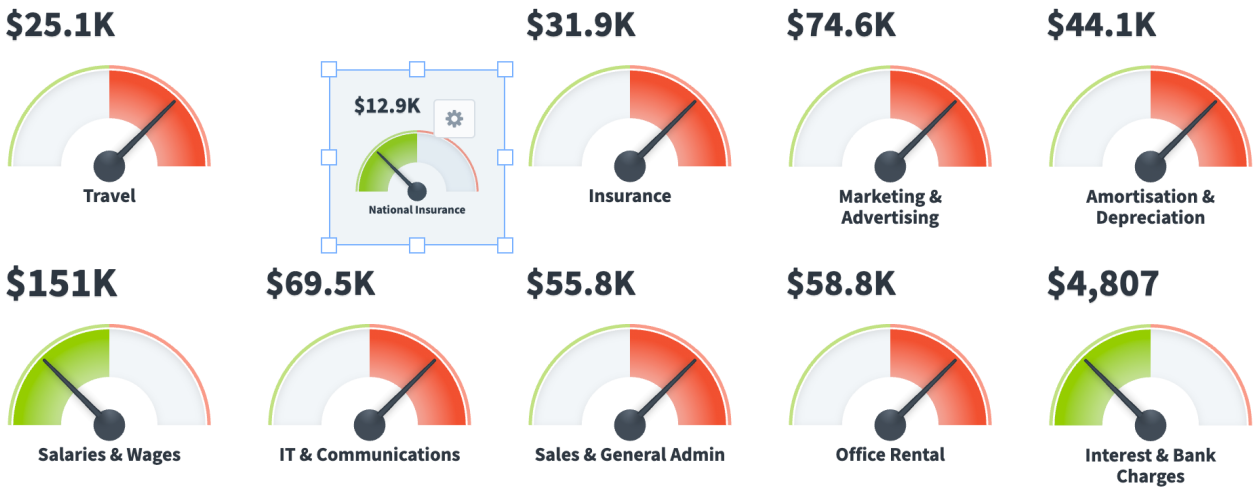
Each type of widget has unique configuration options, many of which are discussed in separate articles.

- Image
- Text
- Shape, Bubble, and Value
- Line
- Embedded
- Speedometer and Linear Gauge
- Notes
- Gantt

- Initiative Chart
- Dataset
- Chart and Report

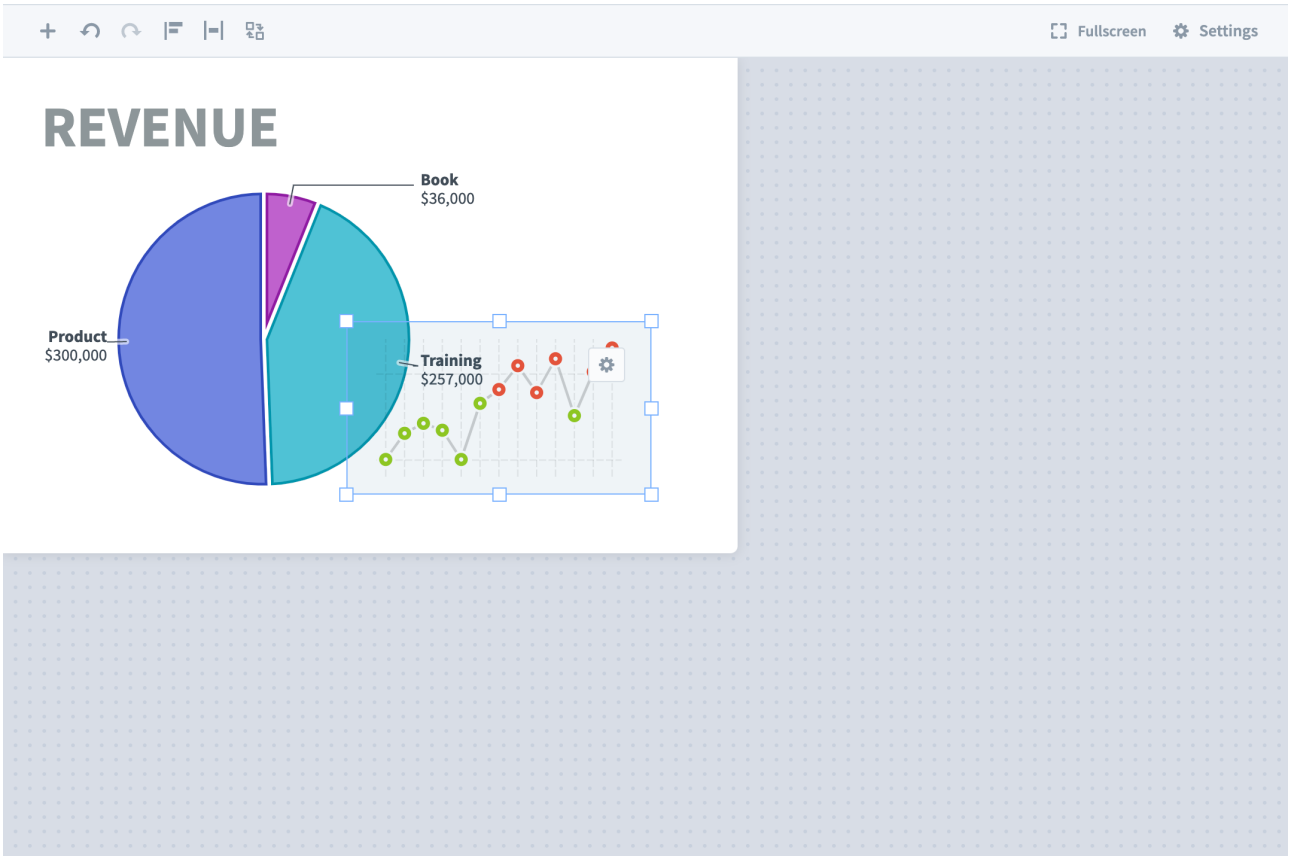
Arranging Widgets

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.

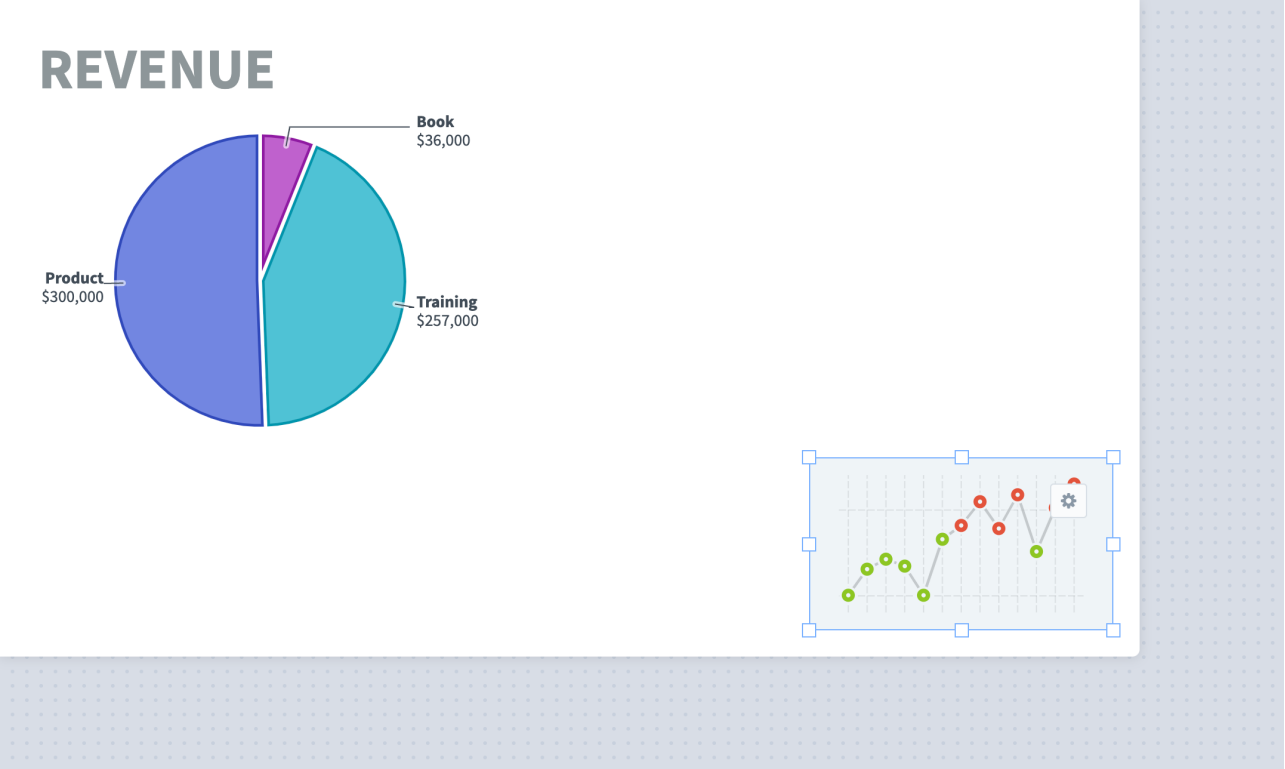


Automatically Resizing Canvas

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



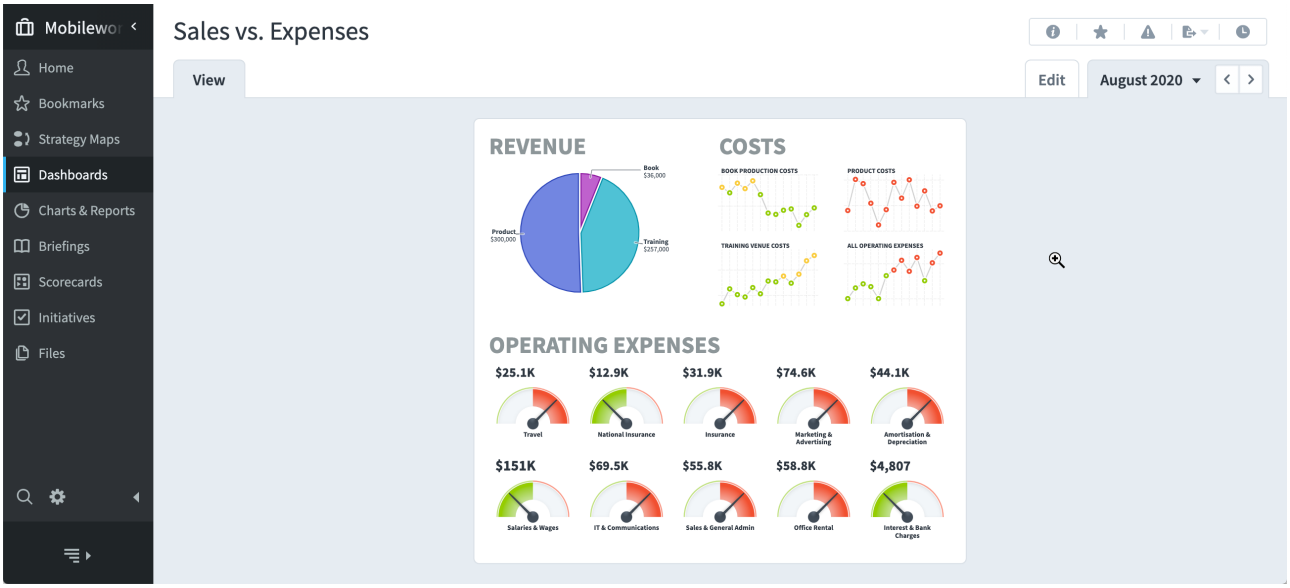
And then watch the canvas grow as we drag it away from the pie chart.



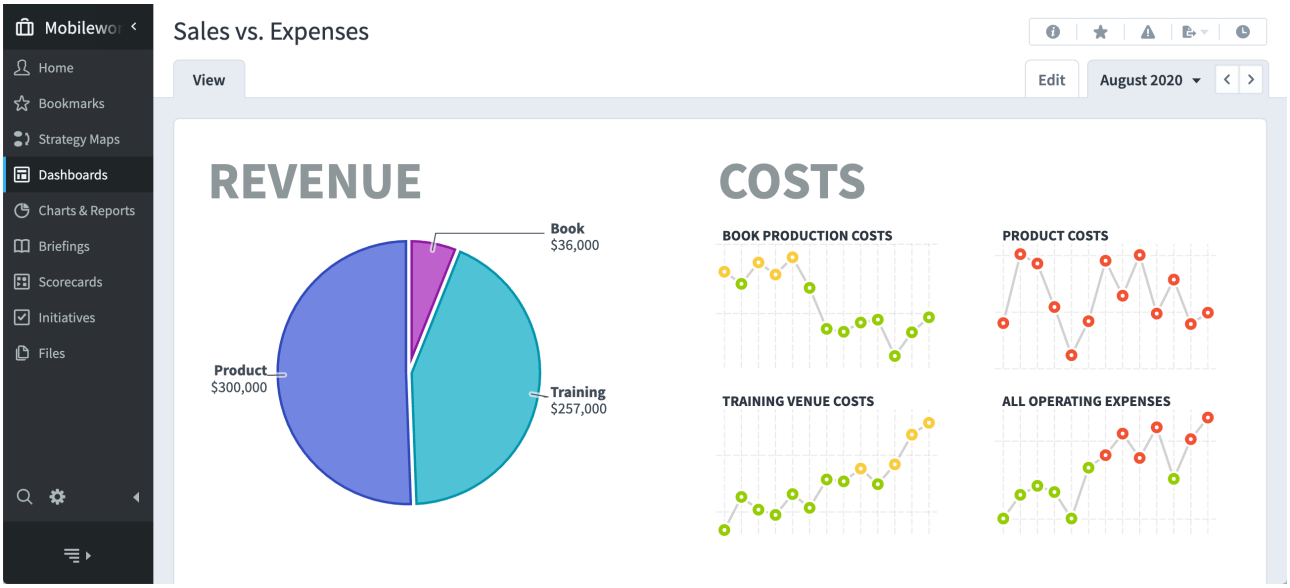
When you're viewing your dashboard, the size of your canvas doesn't matter. Spider Impact automatically zooms the dashboard so that it fits on screen. This is a lot like how PowerPoint presentations never have scroll bars during the presentation, but they do when editing.



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.



Aspect Ratio

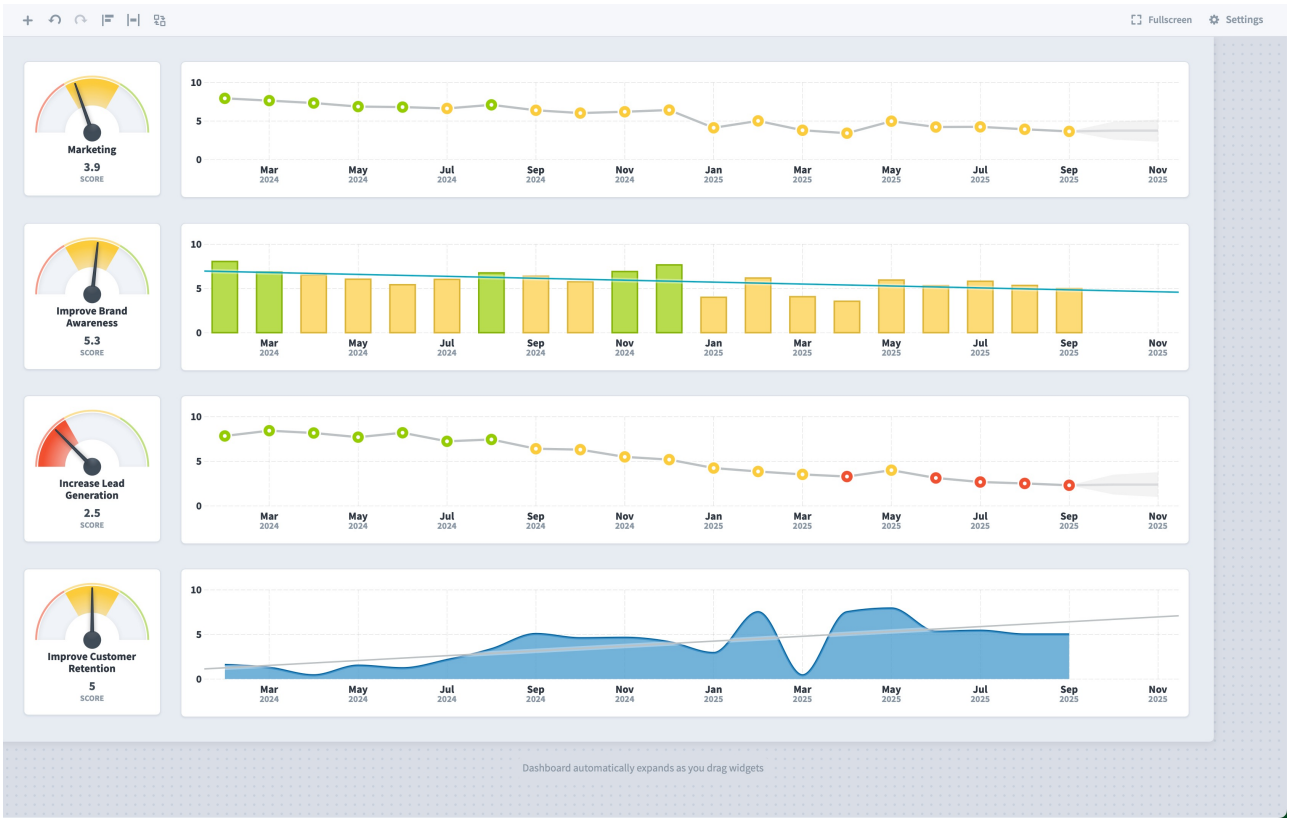
By default, dashboards automatically adjust in both height and width based on where you place widgets.



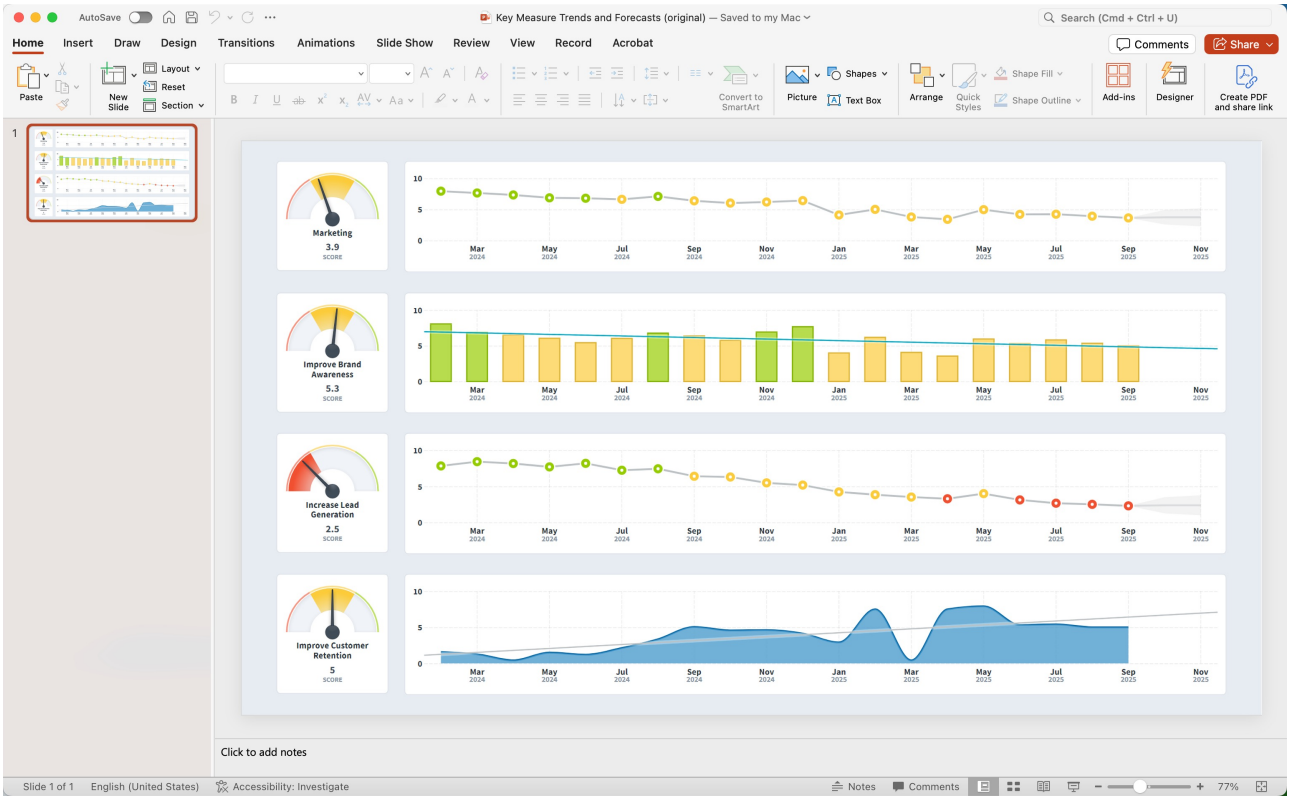
If you choose an aspect ratio of "Widescreen (16:9)" or "Standard (4:3)", however, the dashboard canvas continues to adjust in size based on your widget placement, but its overall height to width proportions are locked in place. As you drag widgets to expand the dashboard, both dimensions adjust proportionally to preserve your chosen aspect ratio. Here we've chosen Widescreen and now see empty space on the right of the dashboard.



This eliminates the trial-and-error process of creating dashboards for specific presentation formats. We're able to quickly rearrange our widgets to best take advantage of this specific aspect ratio.

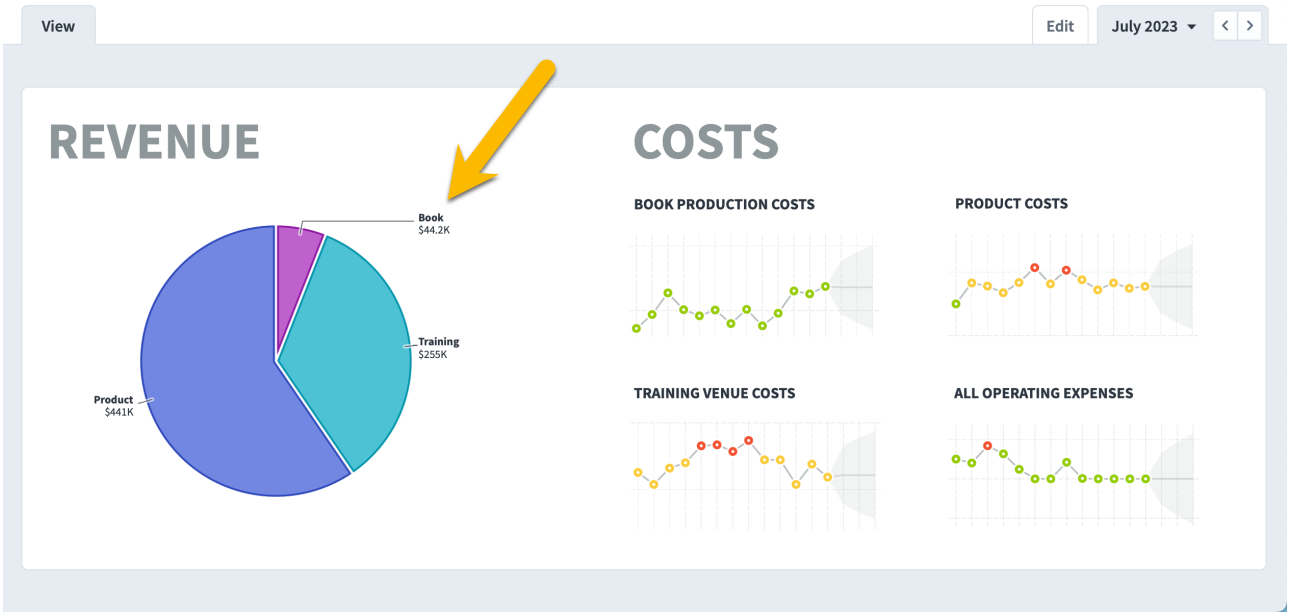


And when we export to PowerPoint, our dashboard fits perfectly on a widescreen PowerPoint slide without any empty space around the edges.

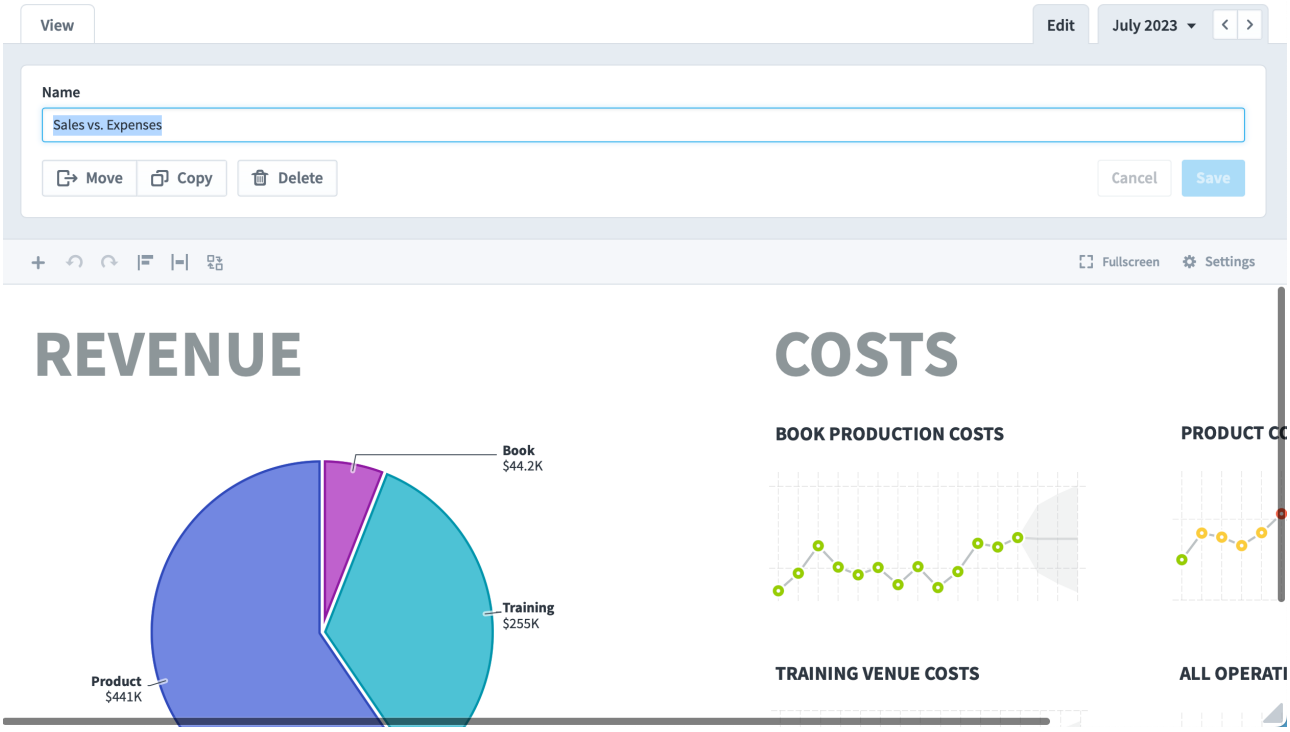


Font Size Appearance

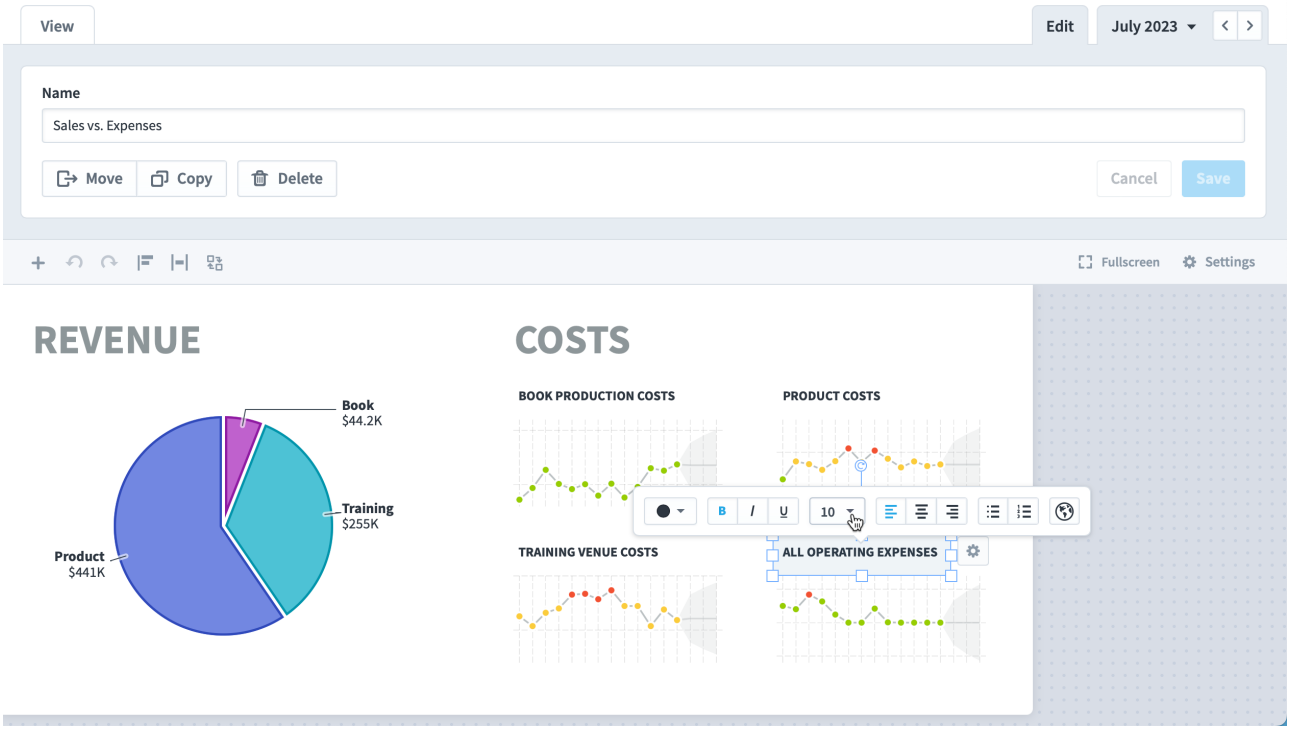
An interesting side-effect of automatic dashboard sizing is that you can universally make all text on dashboards appear larger or smaller by changing the overall size of the dashboard while keeping its general layout the same. For example, here's a dashboard where the pie chart labels look too small.



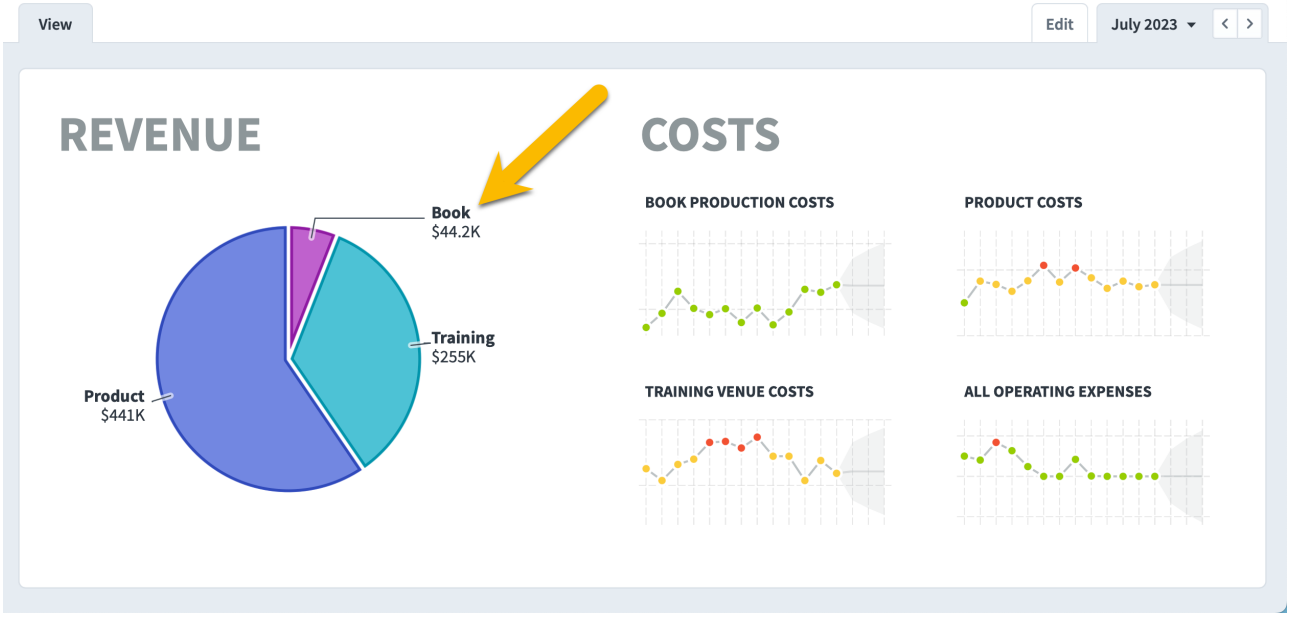
Here's what the dashboard looks like when we edit it.



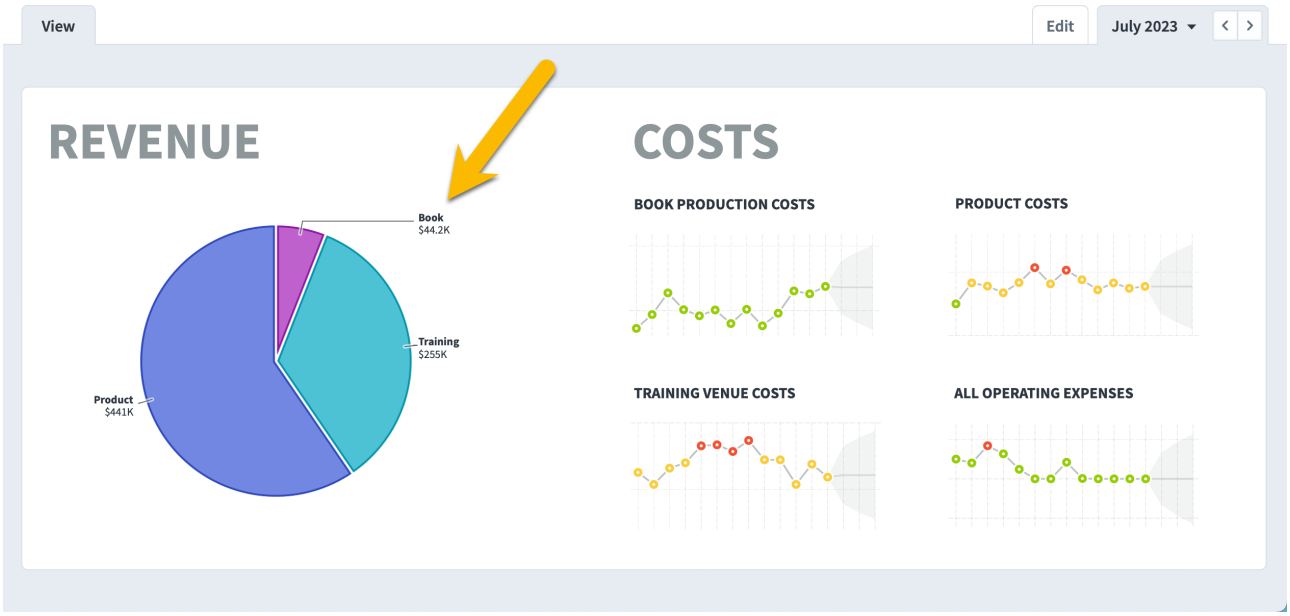
To fix the problem, we're going to resize each widget to be smaller, reduce the font size of text widgets, and move widgets closer to each other. We'll keep the general dashboard layout the same and just make everything smaller and closer.



Now when we view the dashboard, the pie chart labels are much easier to read. That's because the labels stayed the same size while everything else became much smaller.

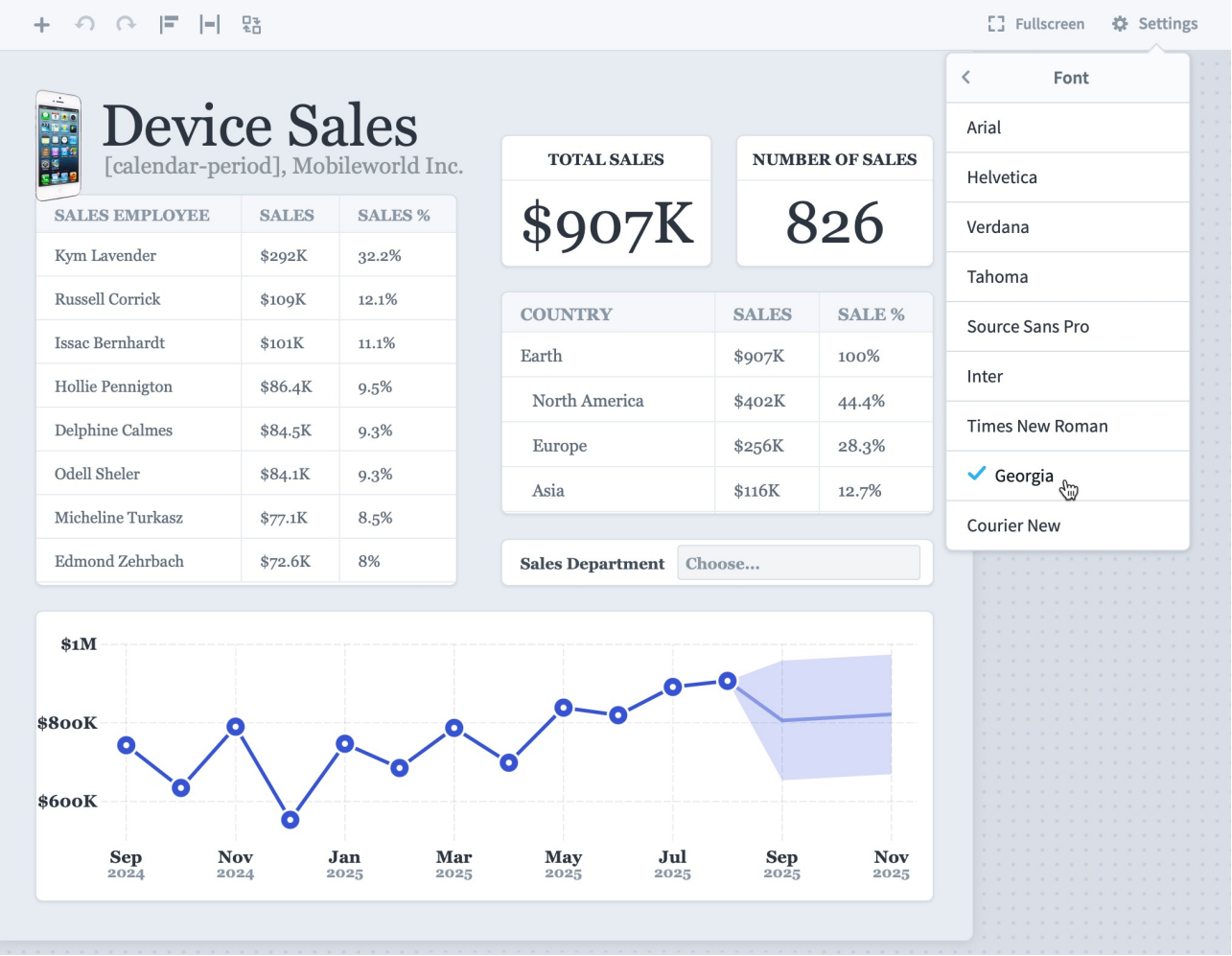


For reference, this is what we started with.



Font face

To change the font, open the dashboard Setting and select the "Dashboard Font" submenu. The selected font applies to all dashboard content including widget text, chart labels, and data values.

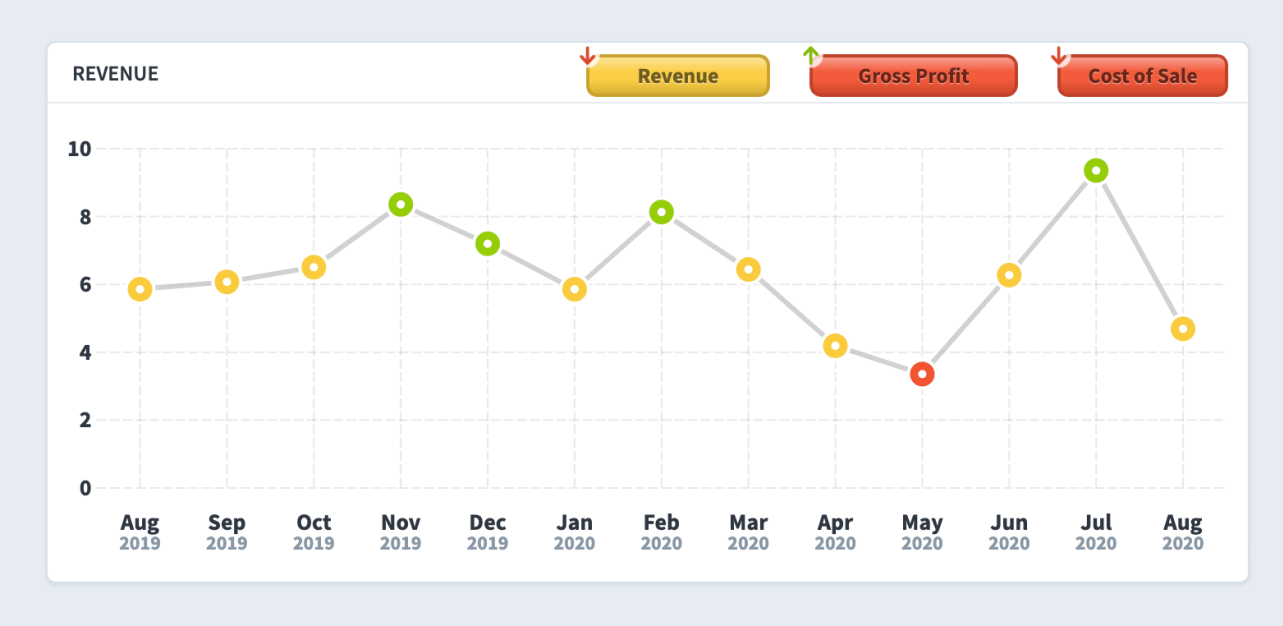


Available fonts include:

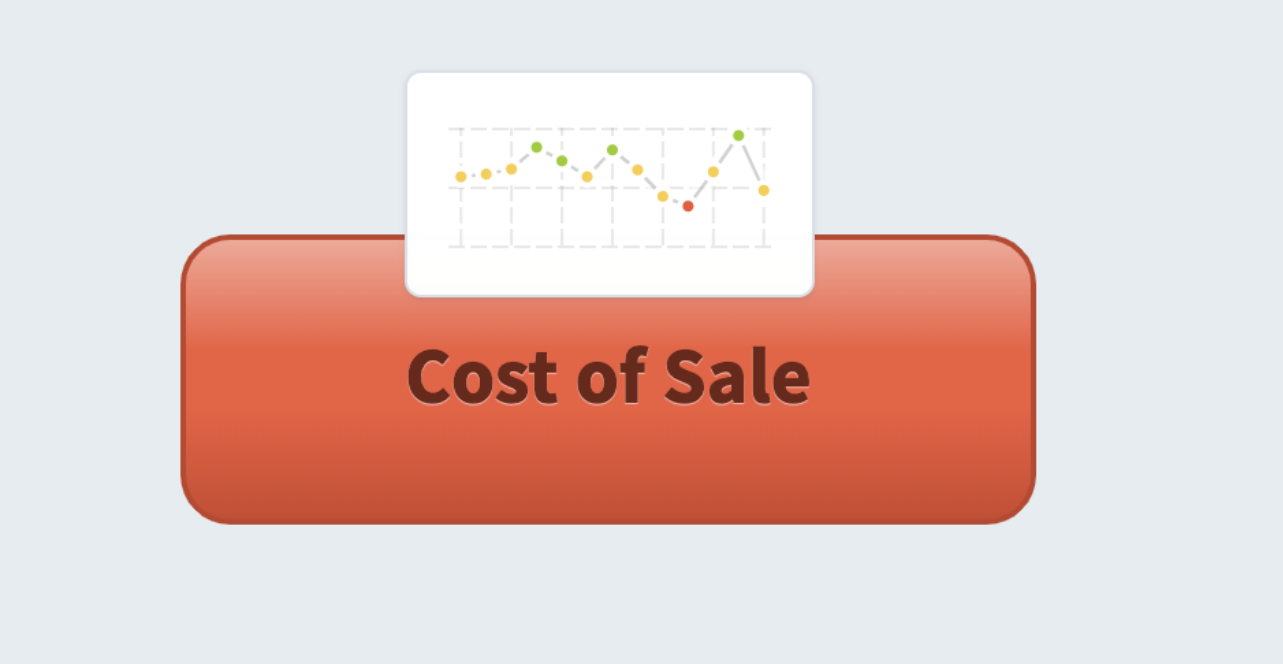
- **Sans-serif:** Arial, Helvetica, Verdana, Tahoma, Source Sans Pro, Inter
- **Serif:** Times New Roman, Georgia
- **Monospace:** Courier New

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.

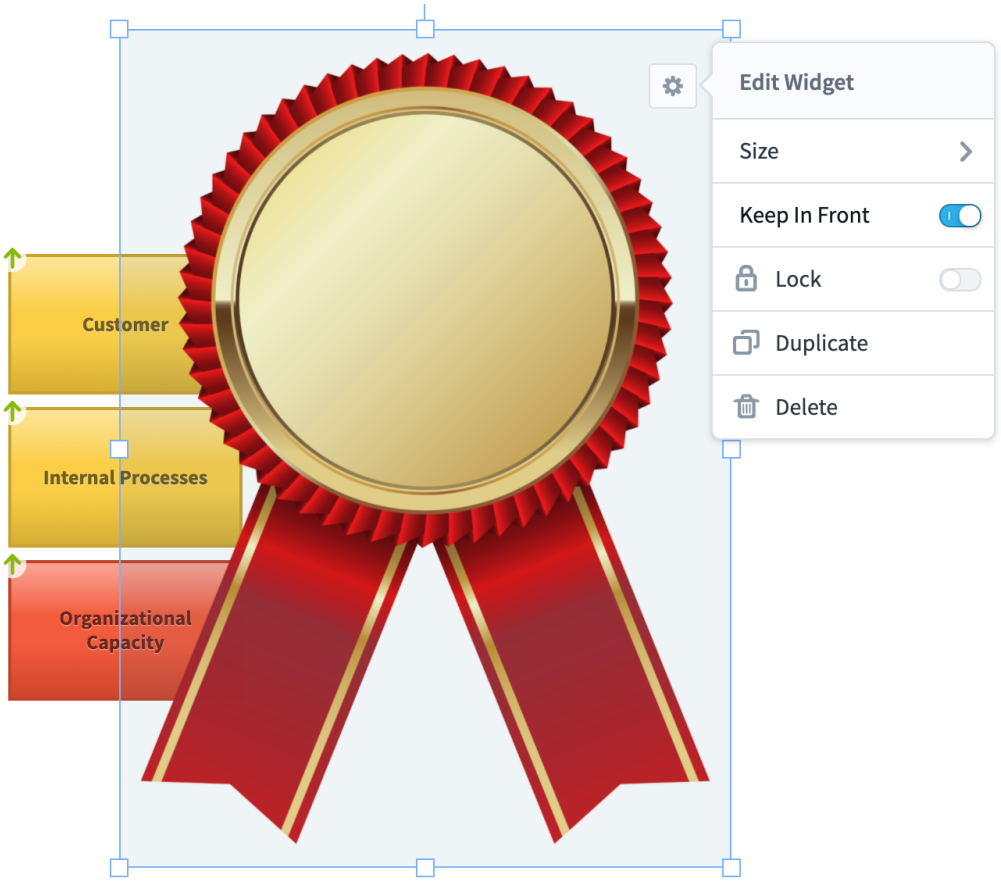


Keeping smaller widgets on top of larger widgets works great the vast majority of the time. If you're doing very complex layouts, however, there are times when you want to force a widget to the top.

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.

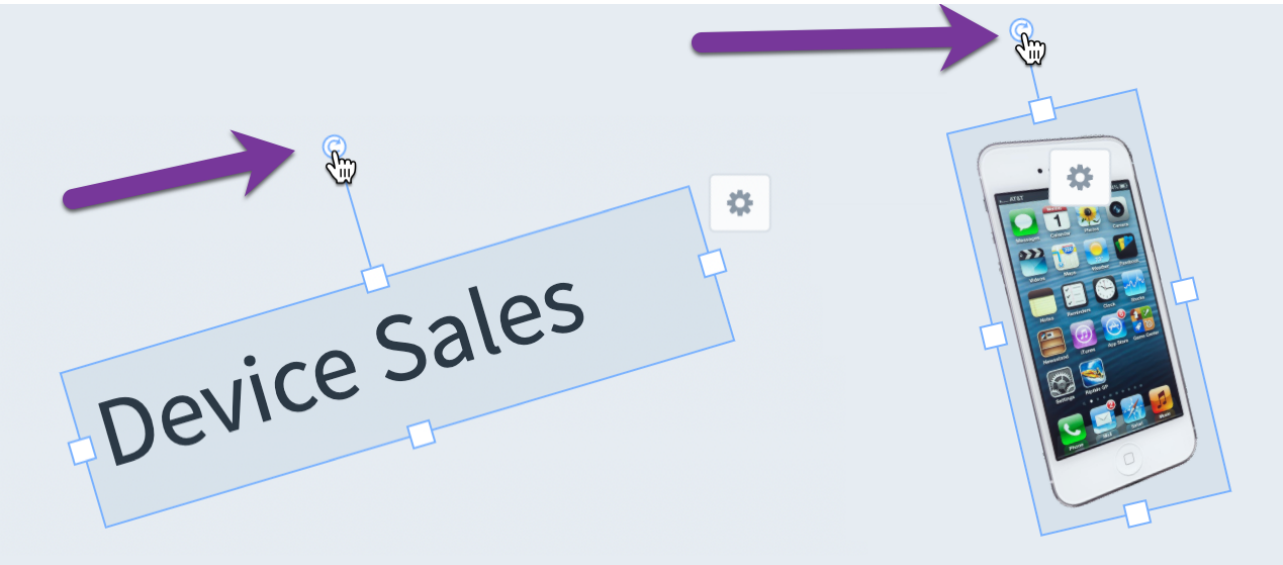


To force the award image to the top, we're going to turn on the "Keep in Front" toggle in the widget's configuration menu.



Rotating Widgets

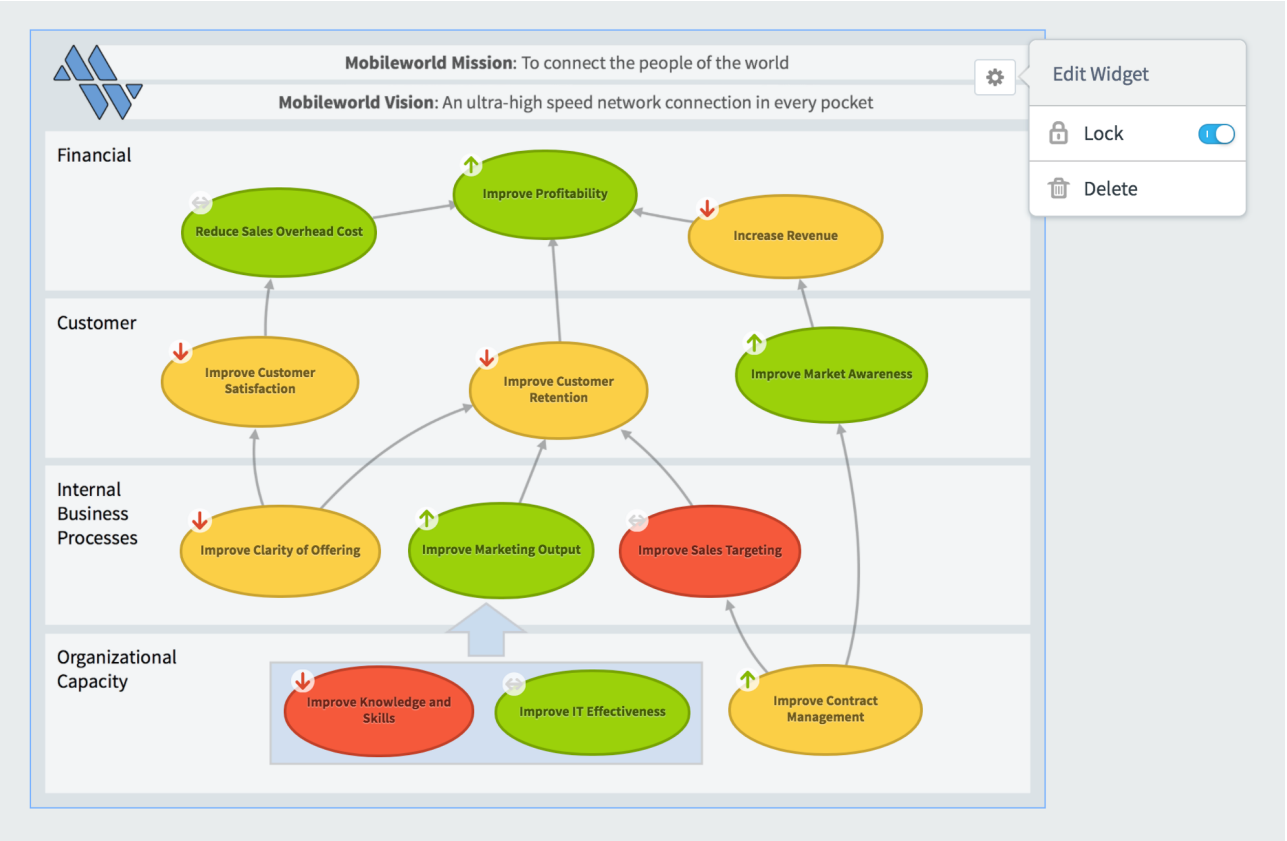
Text, Image, Shape, Bubble, and Value widgets can be rotated using their rotation handles.



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".



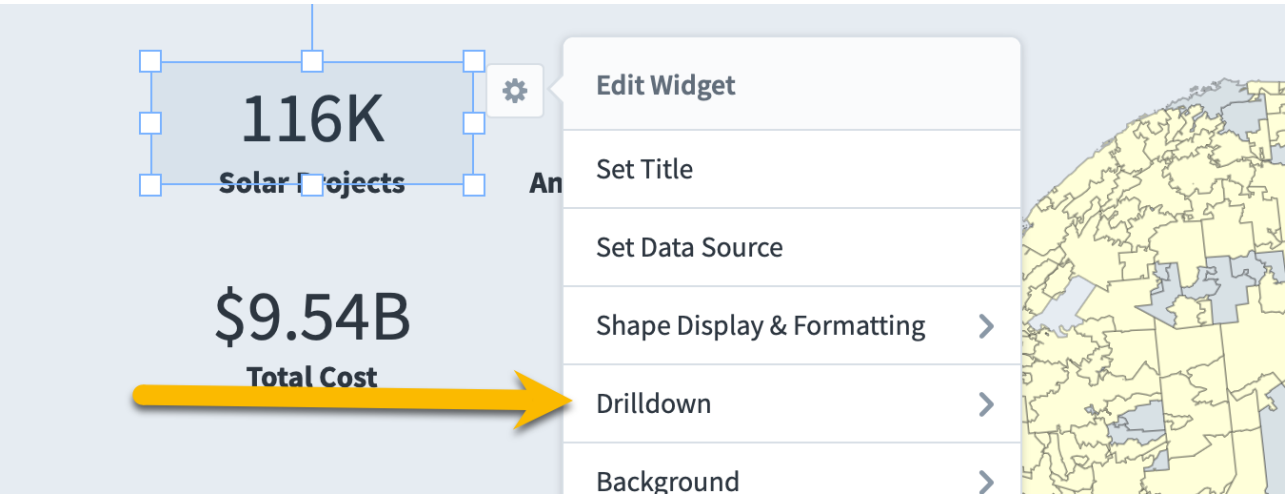
Not only does locking a widget prevent it from moving, but it also prevents it from being selected along with other widgets. So, when the background image is locked, you can drag to select all of the widgets on top of it without selecting the background image itself.

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.

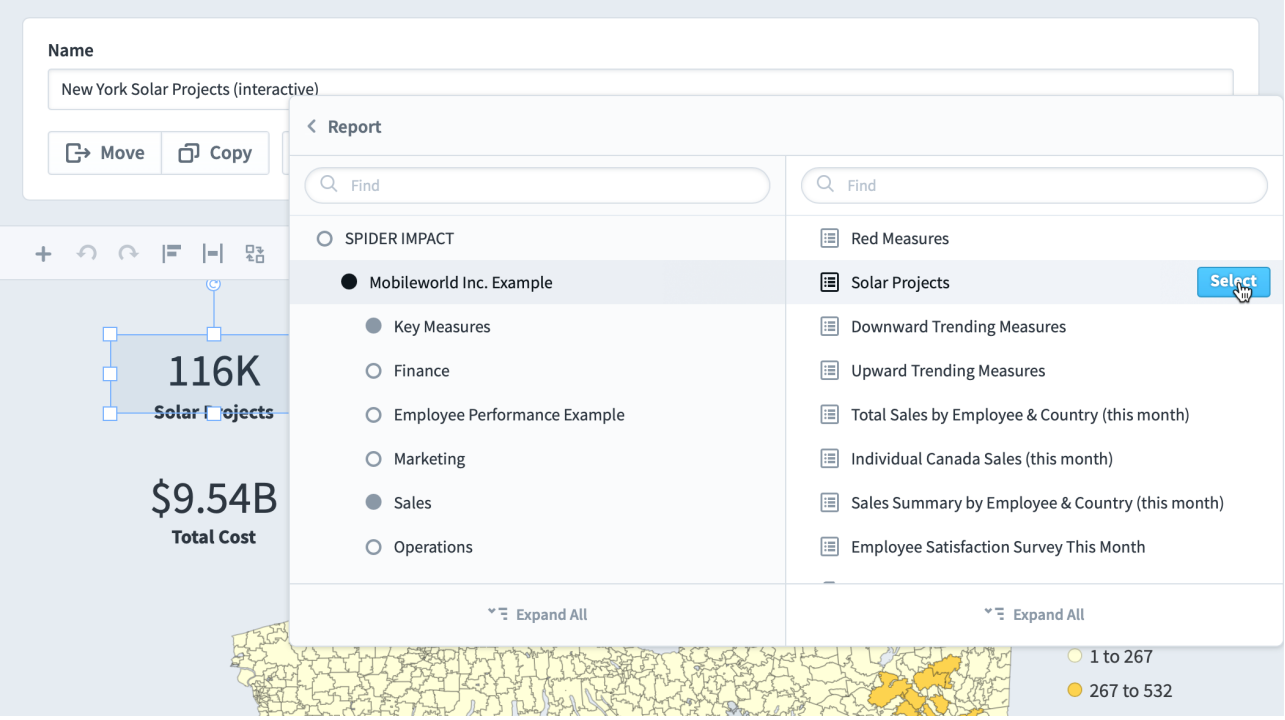
Clicking on widgets to drill to other screens

By default, many dashboard widgets have default drilldown targets. For example, clicking on a speedometer that's showing KPI data will take you to that KPIs Overview tab, and clicking on a single value widget that's showing a Dataset value will take you to that dataset's Explore tab with that widget's filters applied.

You can override this default click behavior for most dashboard widgets by choosing the Drilldown option in their Edit Widget menu.



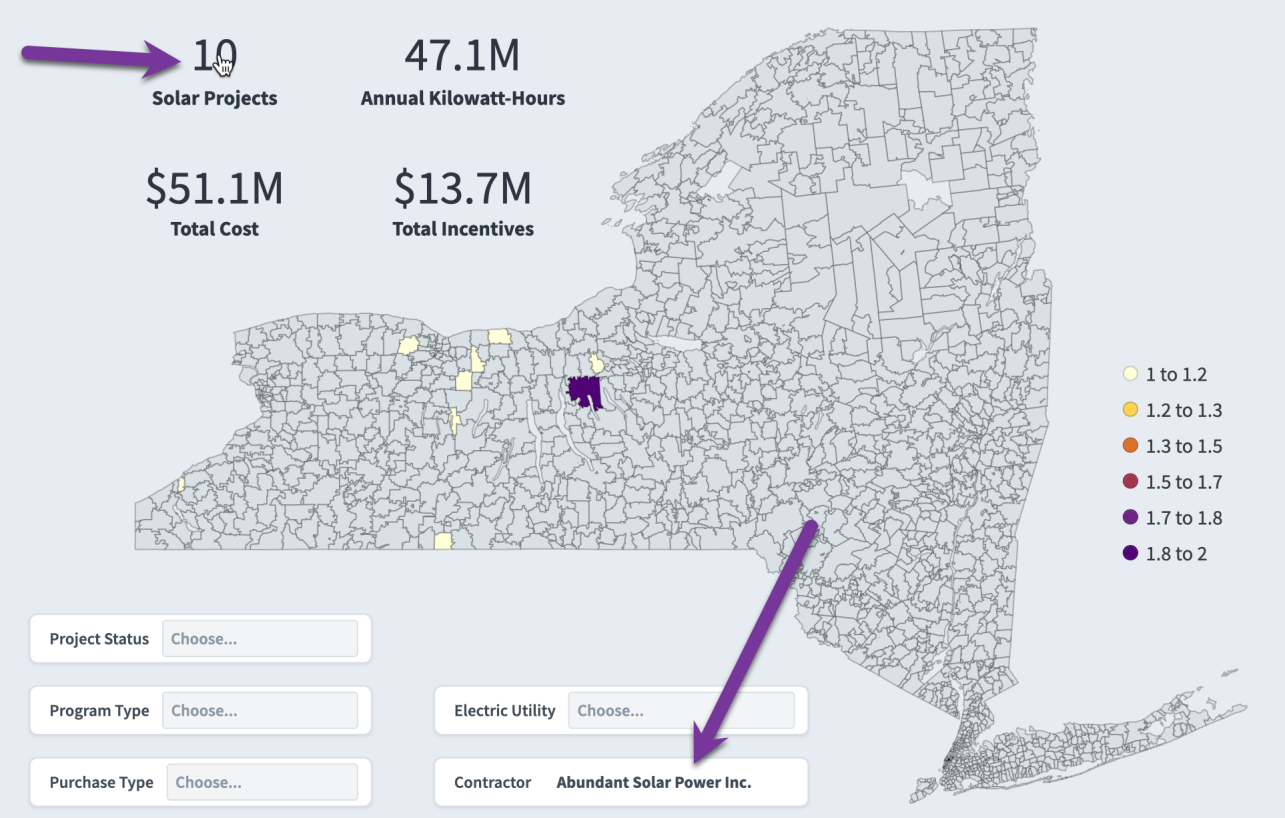
This allows you to choose virtually any item in the software to drill to. Here we're drilling to a Solar Projects report when clicking on a single value widget.



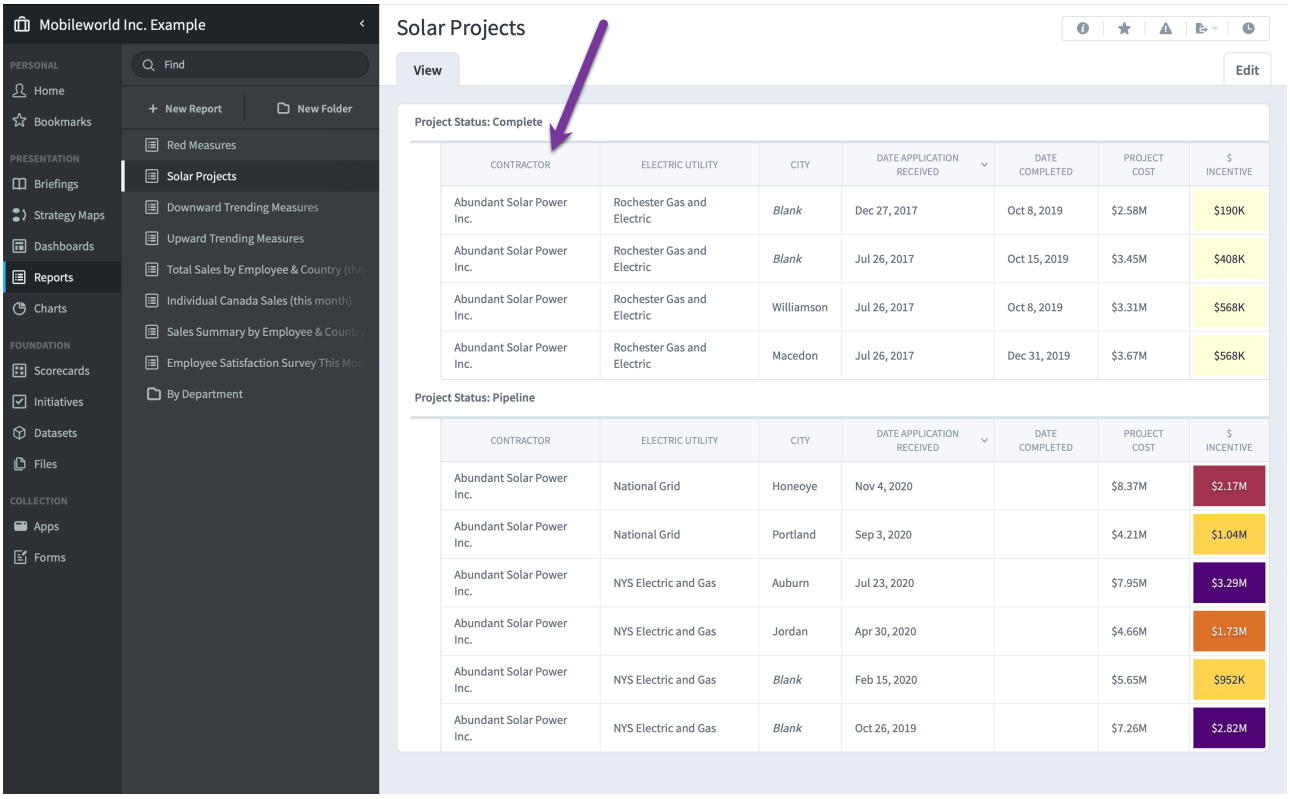
Automatically applying dataset filters on drilldown

Single value widgets and dataset table widgets have even more powerful drilldown behavior. If you choose to drill to a report or dashboard that's showing data from the same dataset as the widget being clicked, the filters behind that number that you click on will be automatically applied to the destination report or dashboard.

For example, here we've set a custom drilldown on "Solar Projects" number that will take us to the "Solar Projects" report. Now when viewing the dashboard with a filter set to show only "Abundant Solar Power Inc" as the contractor, we see there are 10 solar projects for that contractor.



When we click on that "10" number to drill down, the report automatically applies the same contractor filter, showing only those 10 solar projects—no manual filtering required. This allows us to create a single detail report that automatically updates based on what you click to get to that report.



This automatic filter transfer works identically when drilling down to dashboards. Whether your custom drilldown targets a report or a dashboard, the filters that created the value you clicked will be automatically applied to your destination.

Dataset filters are transferred only when the target report or dashboard uses the same underlying dataset as the widget you clicked. Filters within calculated value equations are not transferred.

Initiatives

Overview of Initiatives

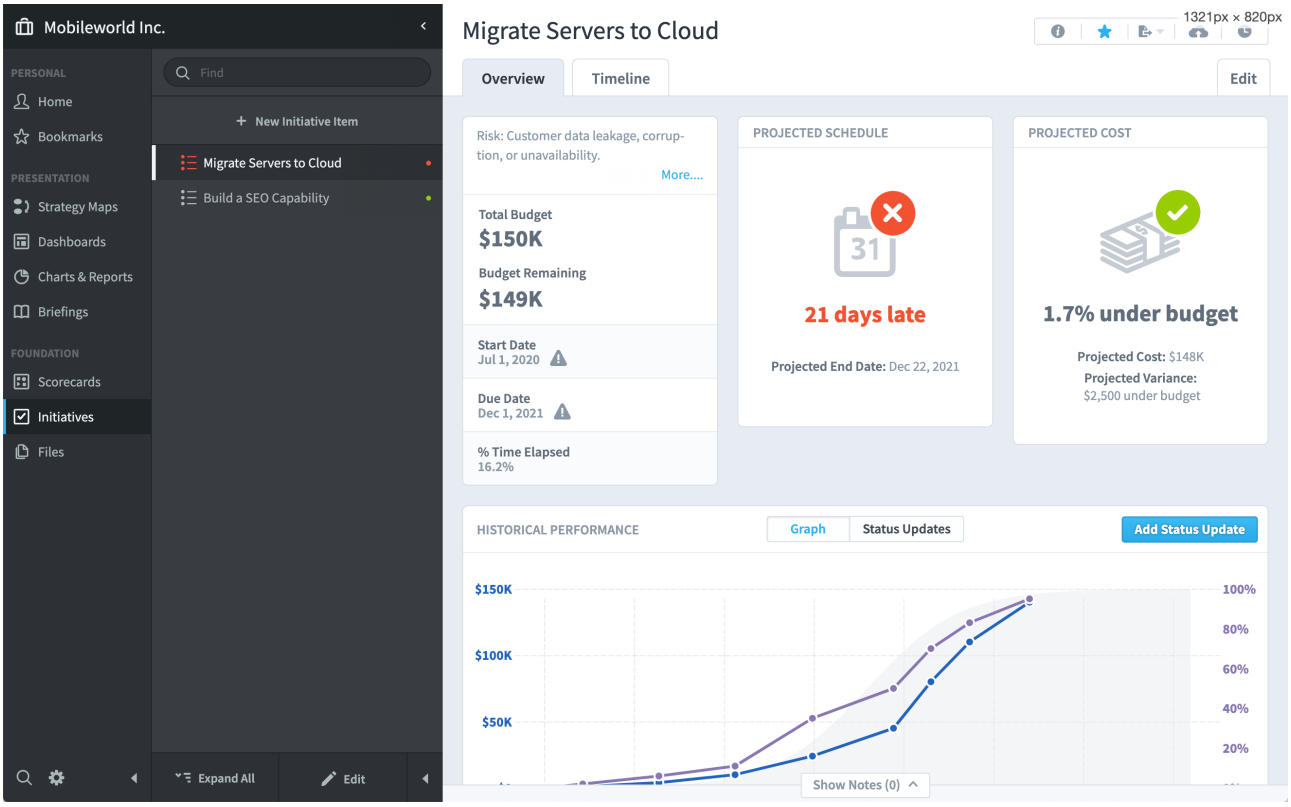
The Basics

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.

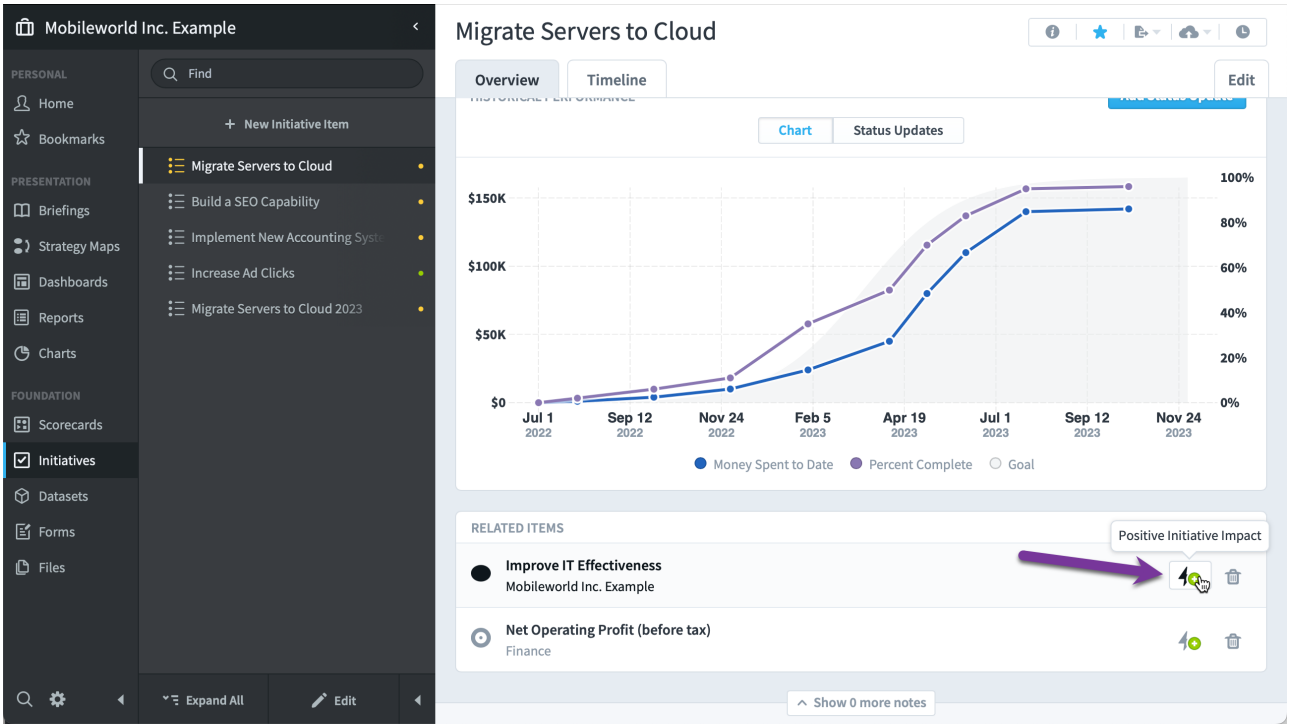
Overview Tab

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.



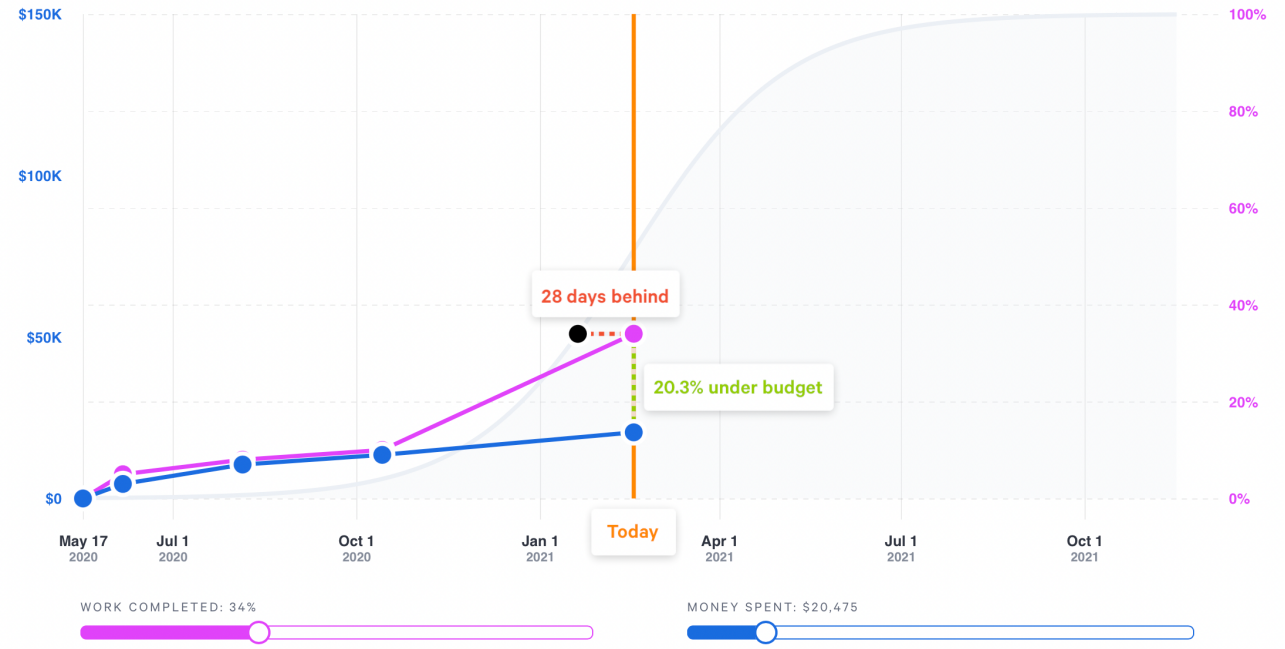
Related Items

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 a scorecard item as a related item, Spider Impact will tell you if the initiative appears to be affecting this scorecard item's performance.



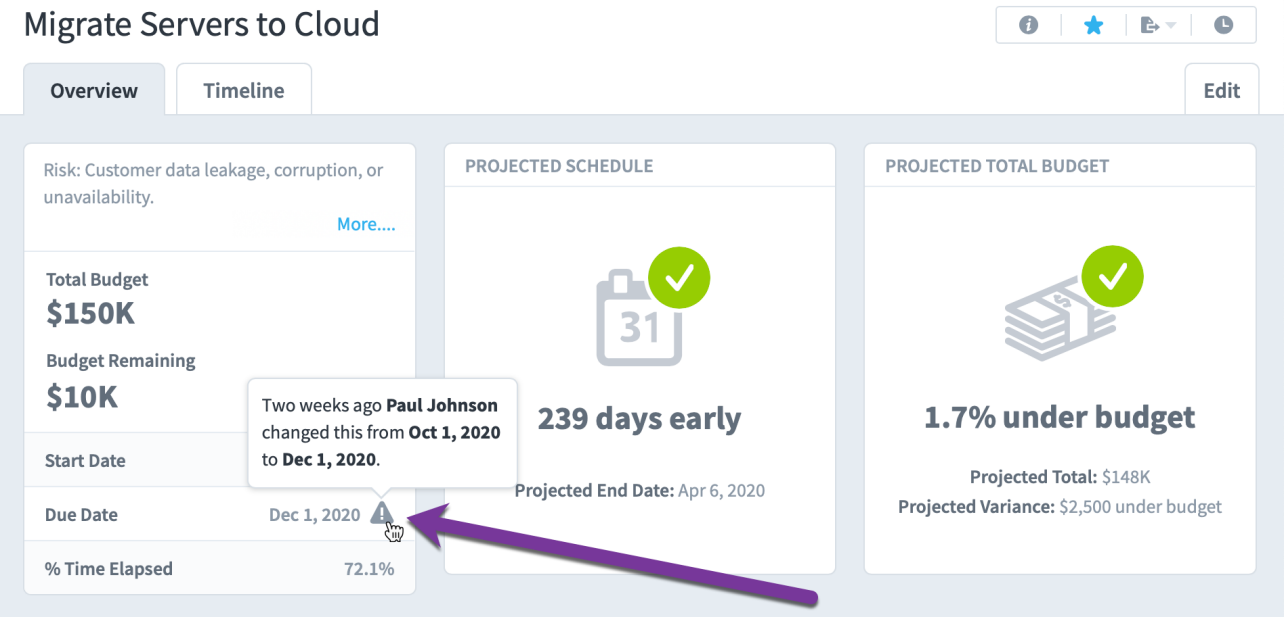
Predicting Budget and Schedule

Spider Impact uses Earned Value Management (EVM) to predict whether your initiatives will be on time and under budget. We've put together an entire article on EVM to explain exactly what's going on behind the scenes.



Changes to Key Numbers

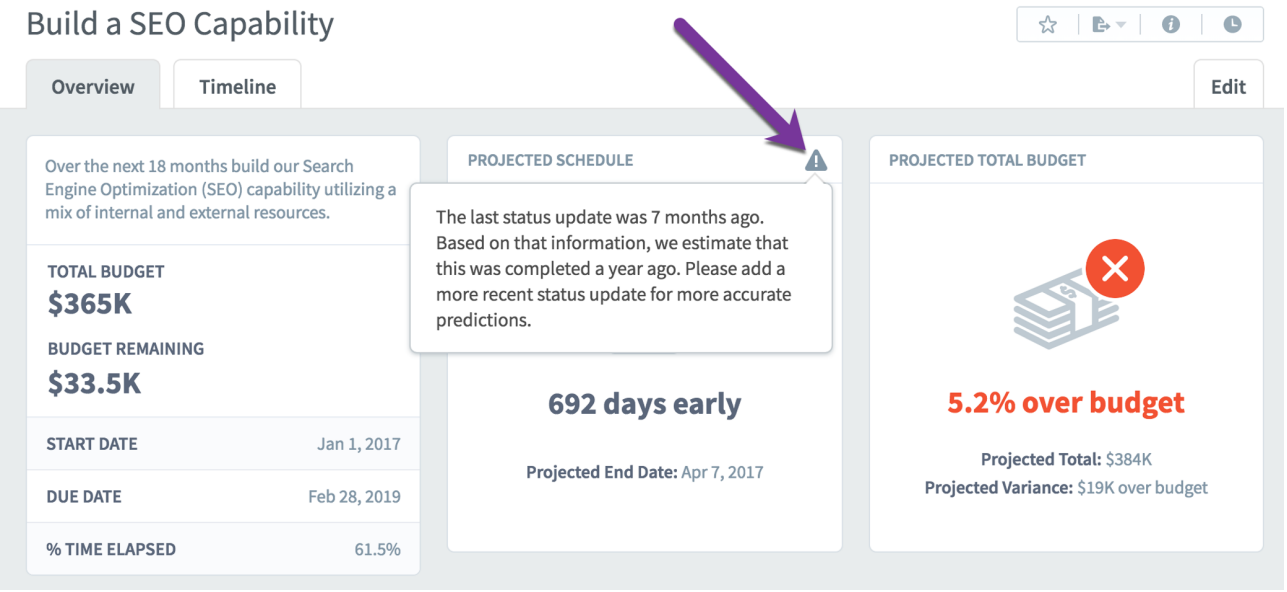
In an effort to promote transparency, whenever an initiatives's start or end date is edited, that information is displayed next to the new value on the overview tab.



Projected End Dates in the Past

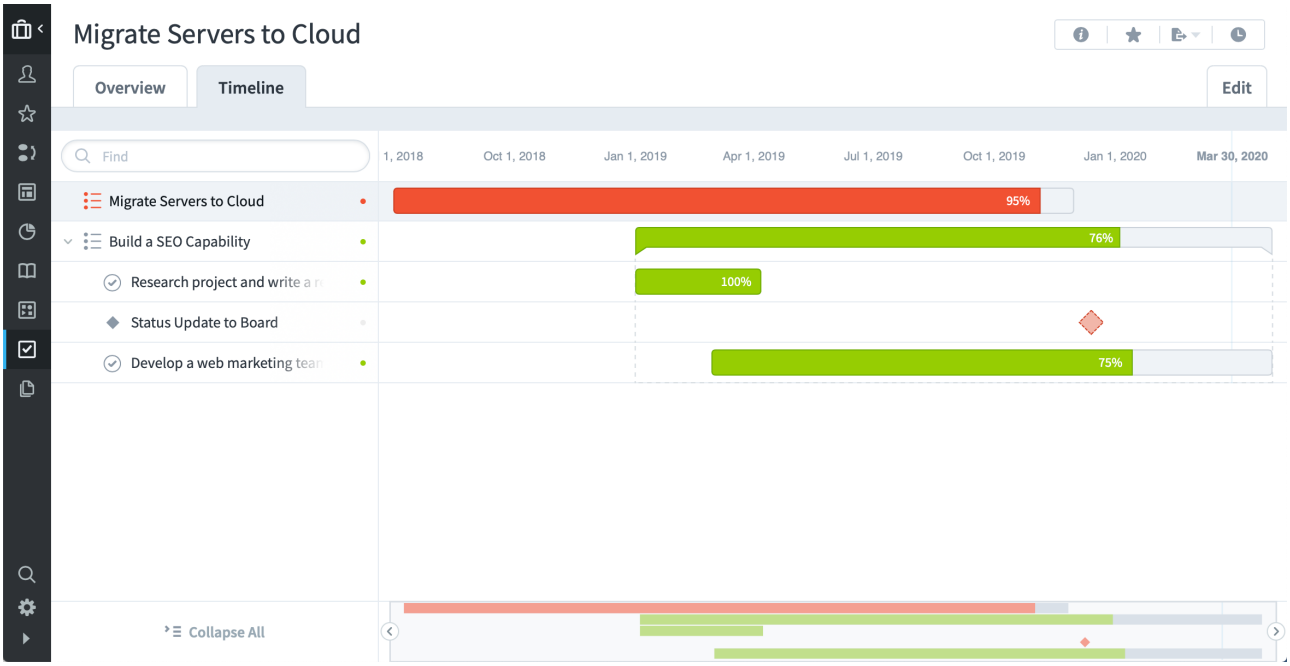
Spider Impact automatically predicts when an initiative will be finished and what its budget will be at completion. These predictions start to fall apart, however, when initiatives don't get regular status updates.

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.

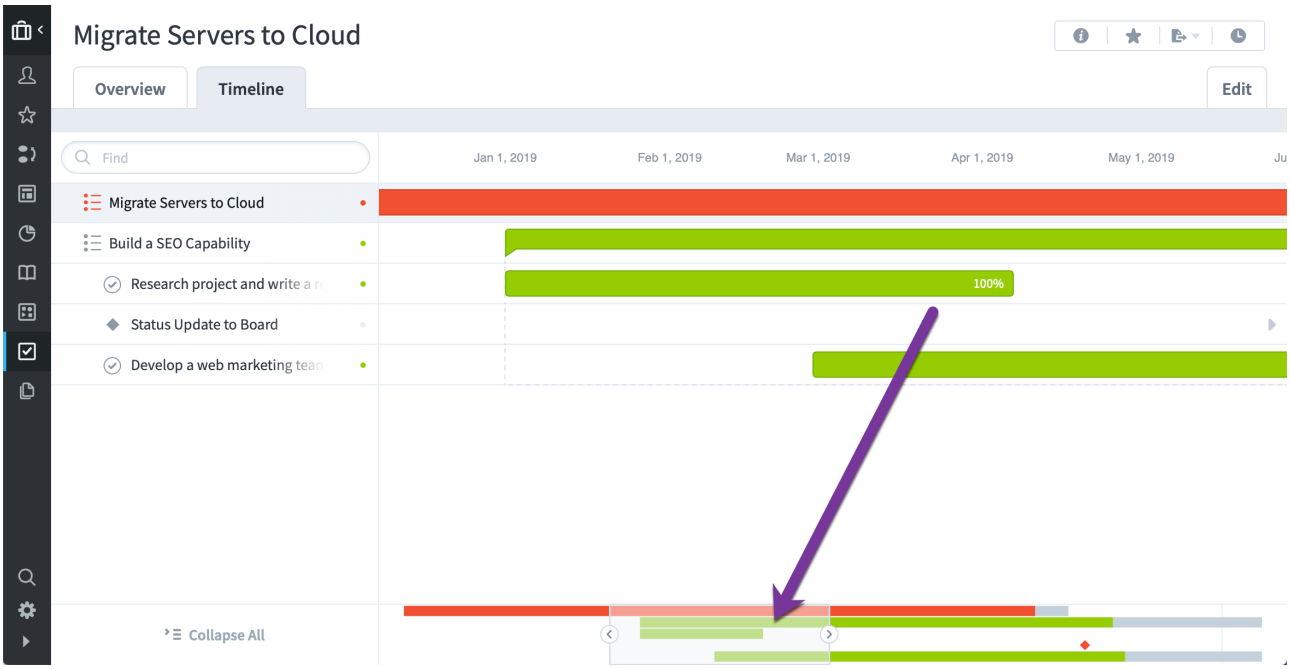


Timeline Tab

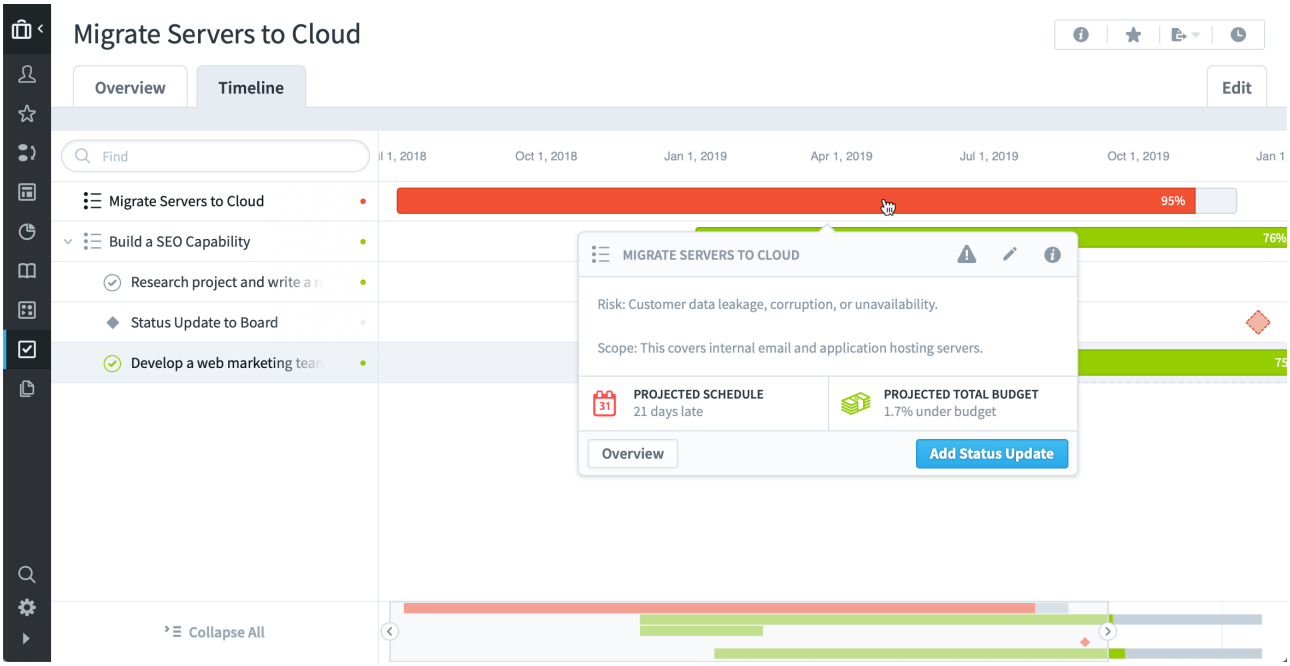
The Timeline tab shows you a fully interactive Gantt chart view of the current organization's initiatives.



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.



Charts

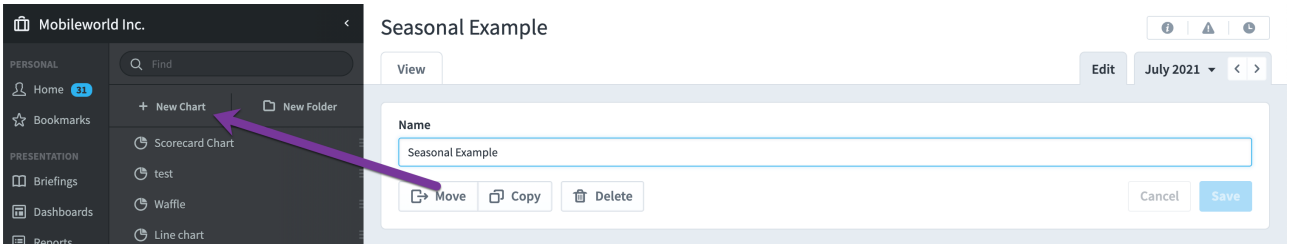
Overview of Charts

The basics

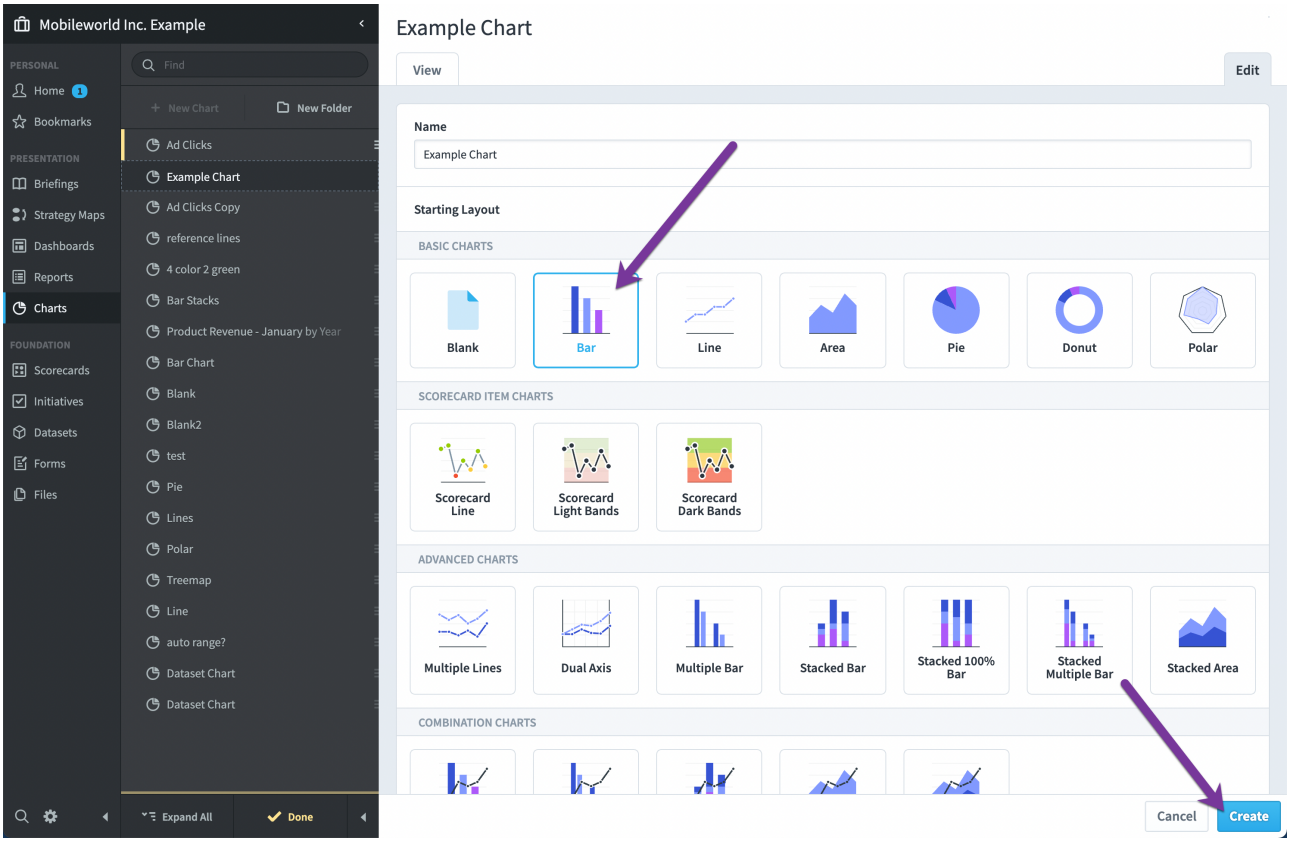
Charts visualize data for any combination of Scorecard items, Initiative items, and Dataset records. Charts are often shown as widgets on Dashboards, but they are also in the Charts section of Spider Impact.

Creating a chart

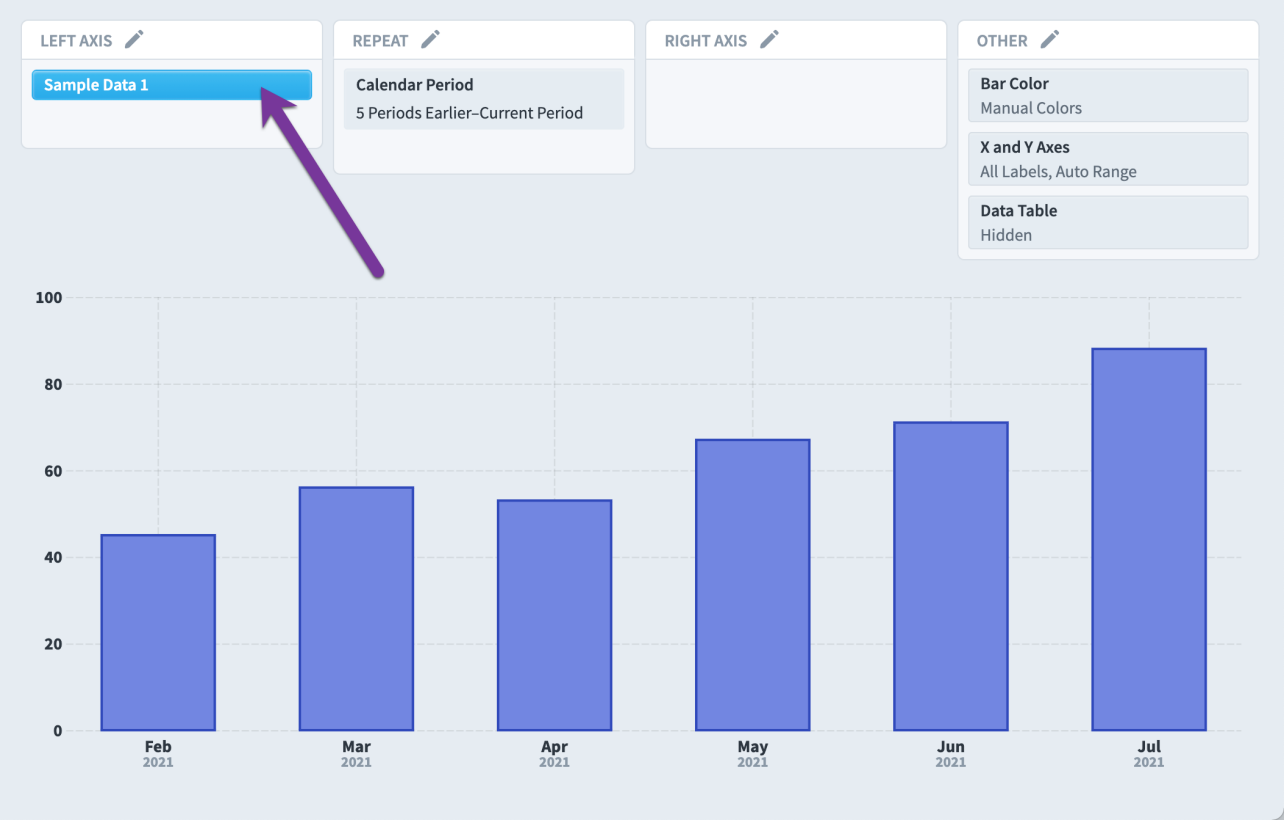
To create a chart, go to the Charts section and click the “New Chart” button.



From here you can name your new chart and decide what it should look like. The default chart type is Blank, but you can choose from a wide variety of example charts to get you started.

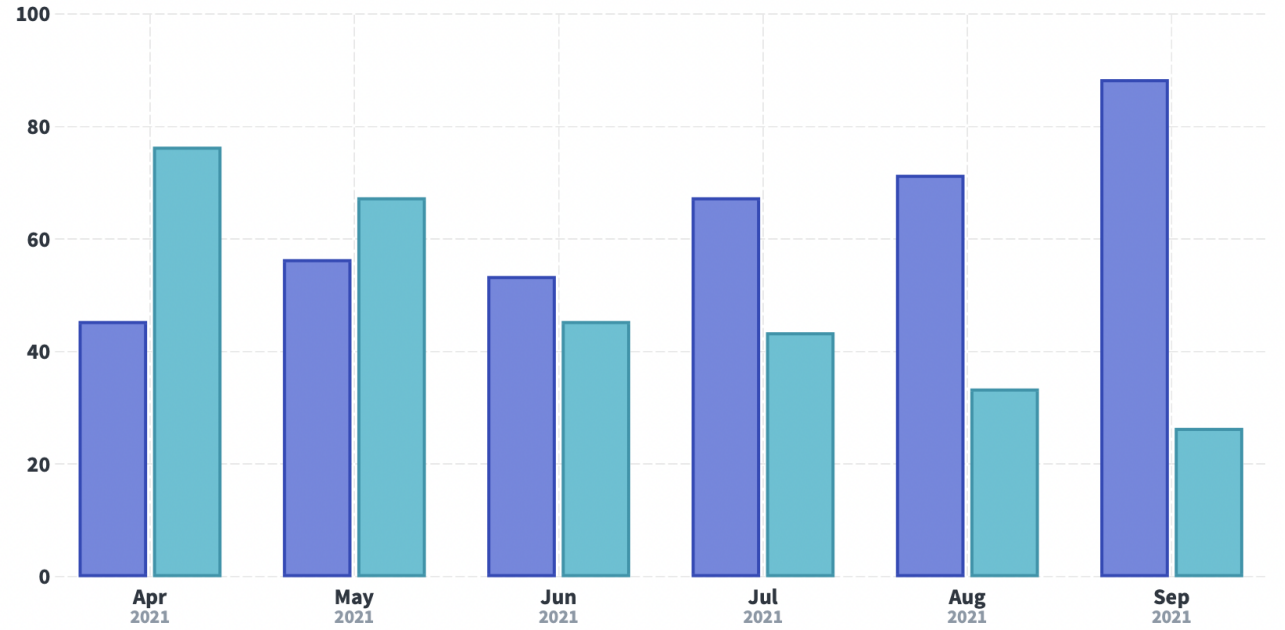


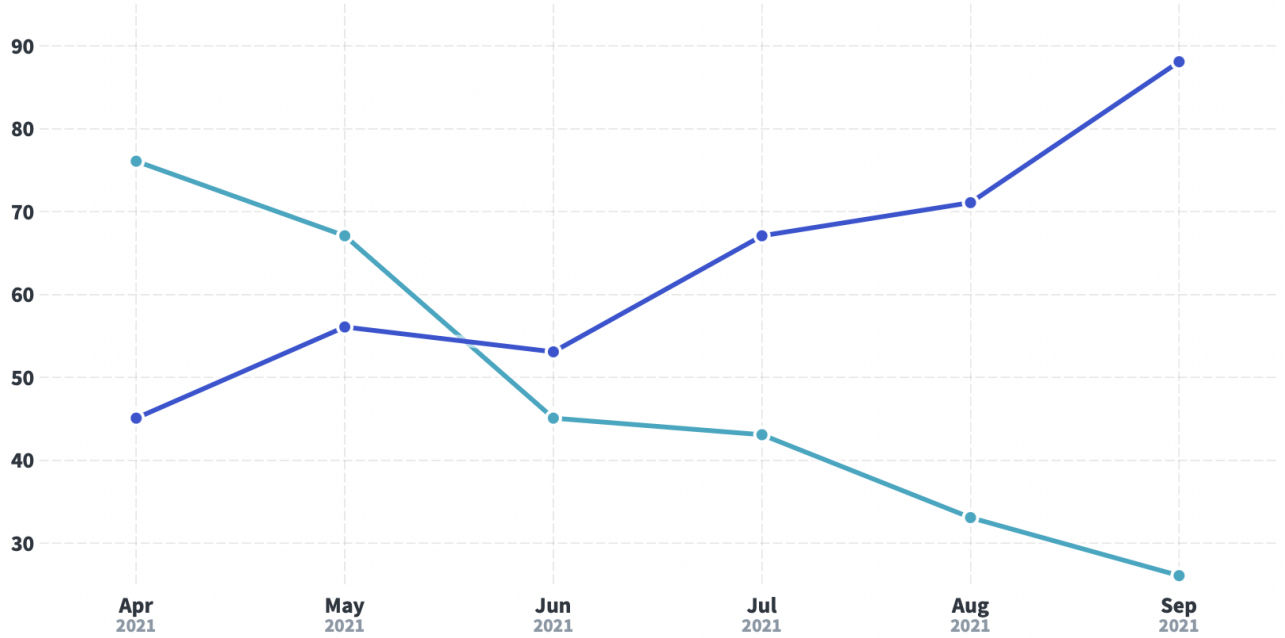
If you choose a pre-built chart example, you'll see a fully finished version of your chart with sample data. This allows you to build visualizations based on how they look rather than focusing on getting the data exactly right from the beginning. All sample data series are marked blue.

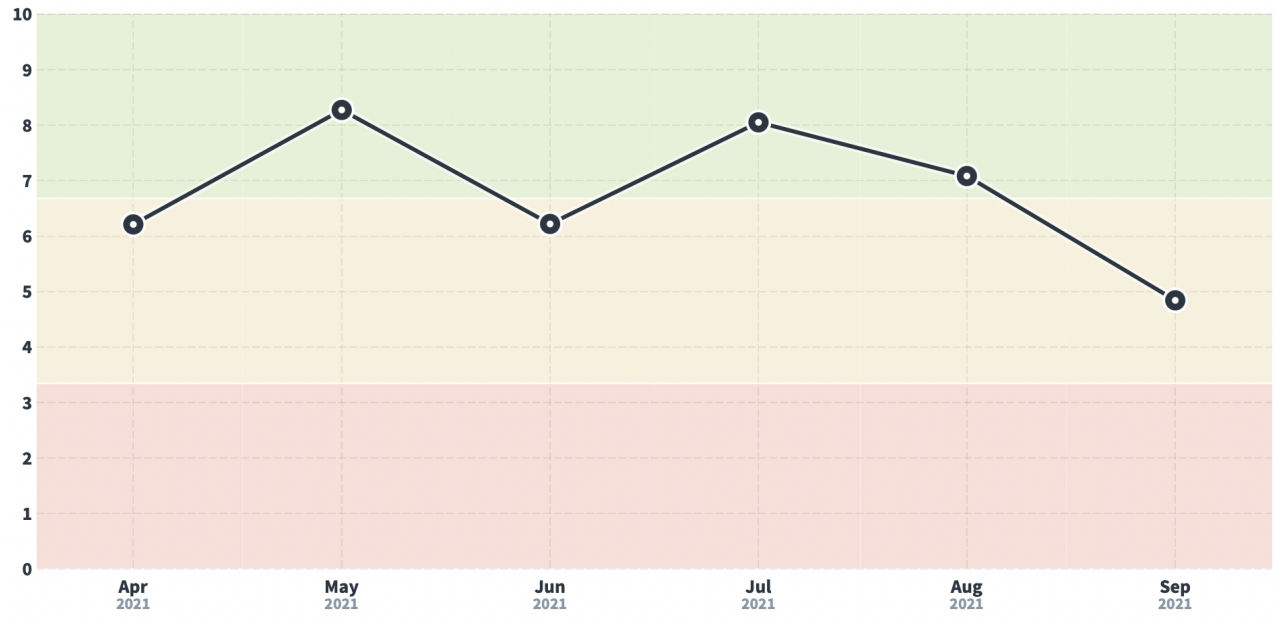


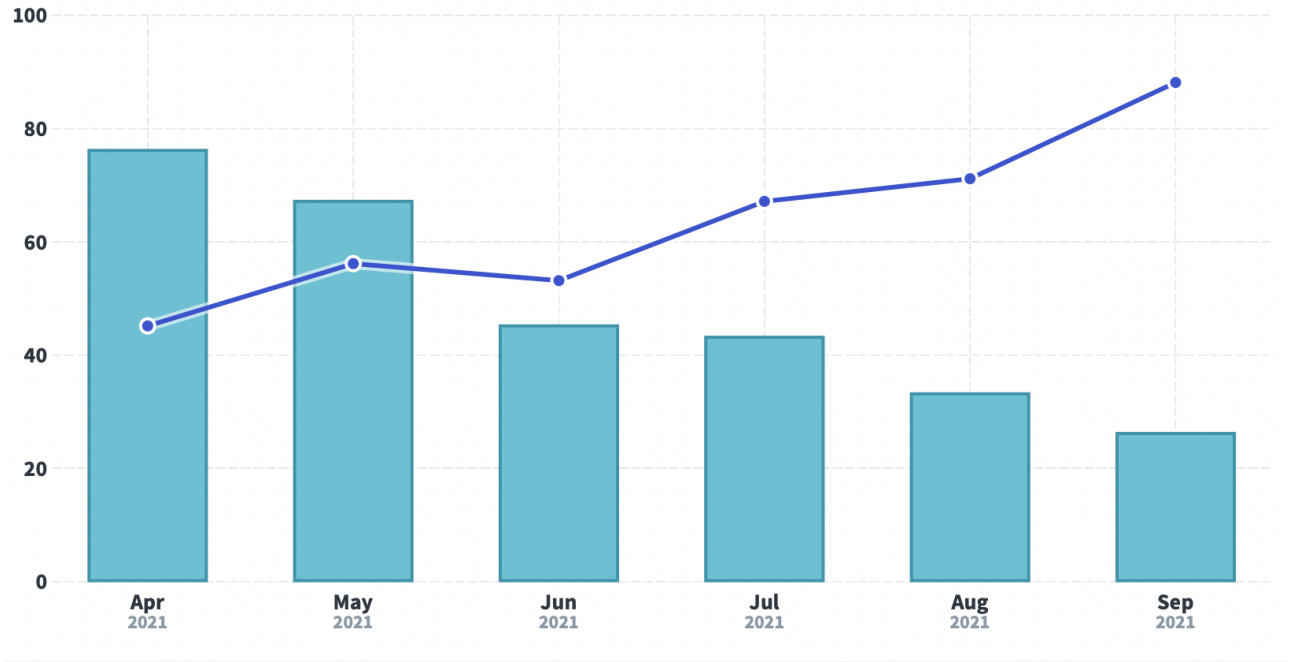
Example charts

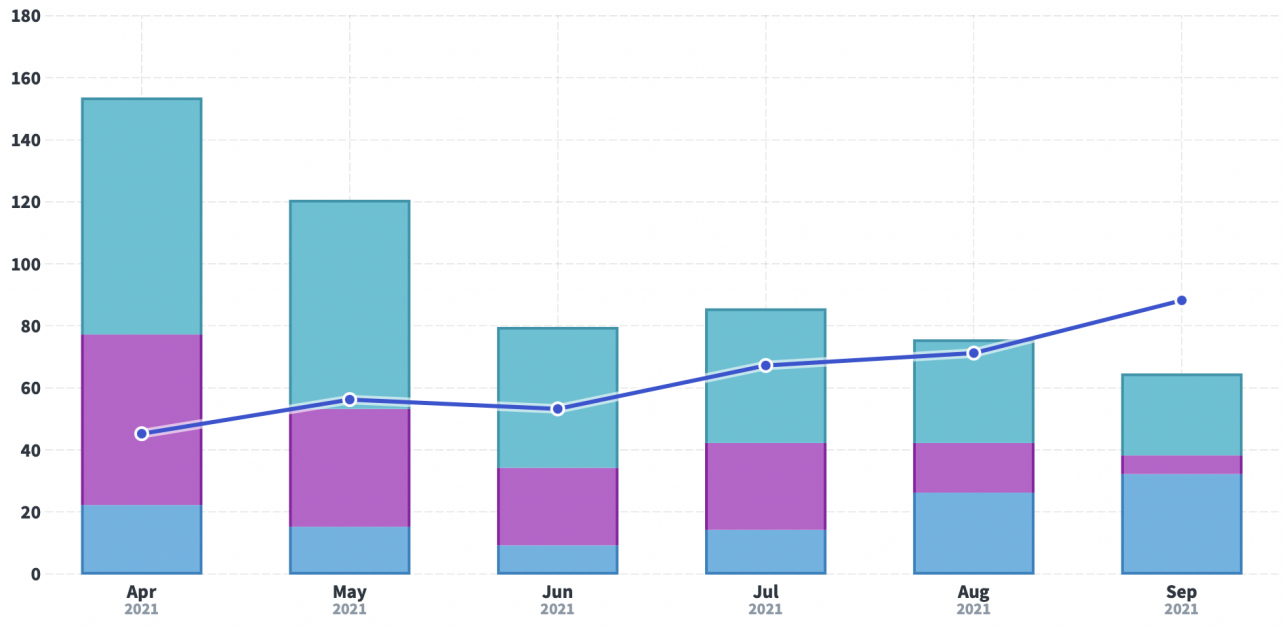
The most popular charts are line, bar, and area charts. These three types of data series can be combined on the same chart.

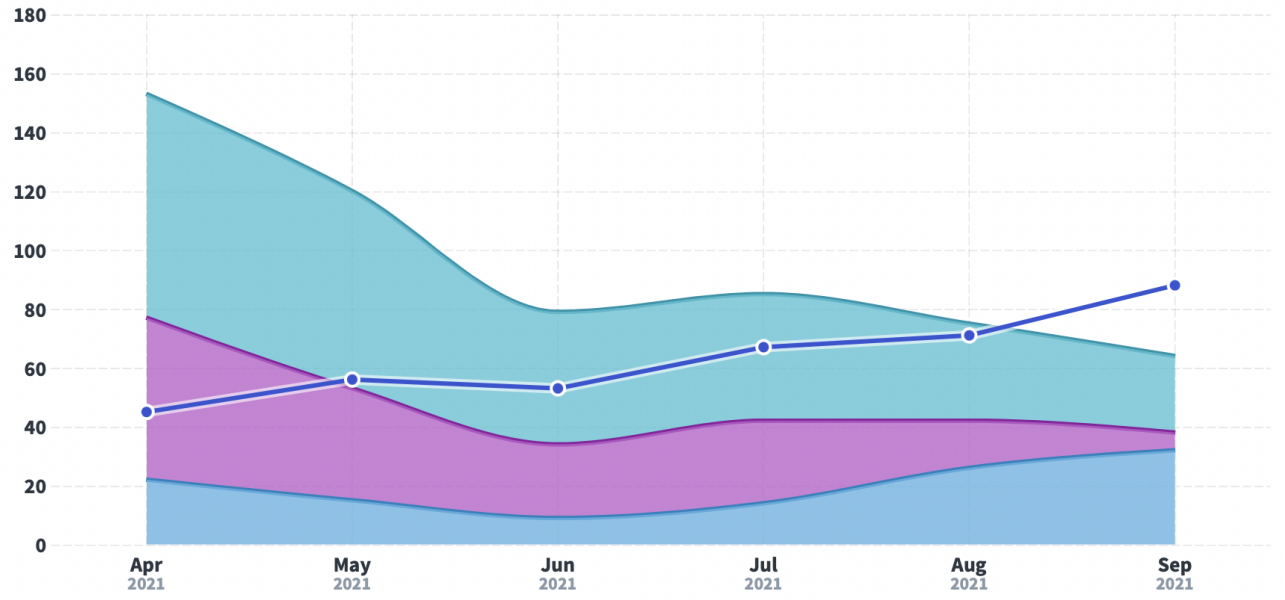

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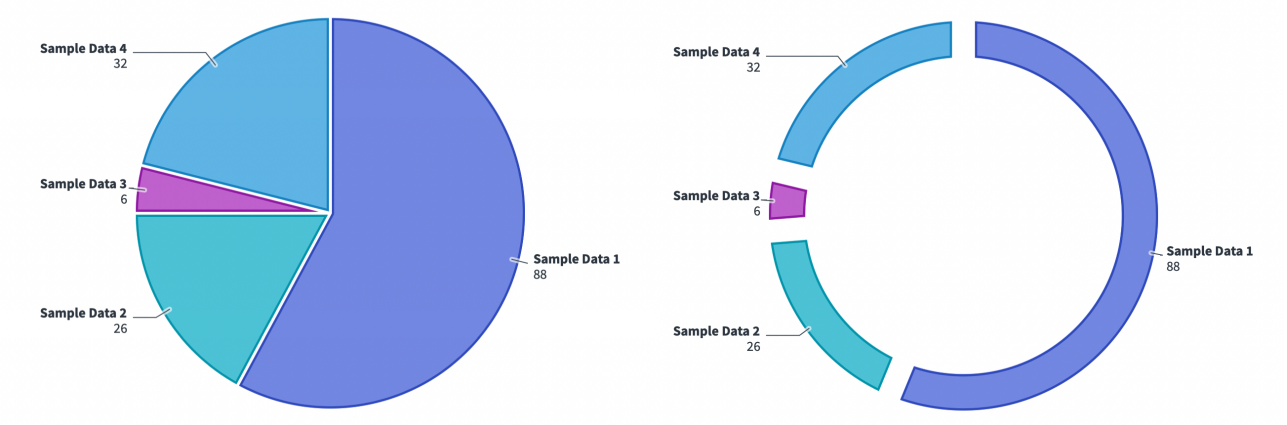

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Pie and donut charts visualize pieces of a whole.



Polar charts help show cycles and scientific data.

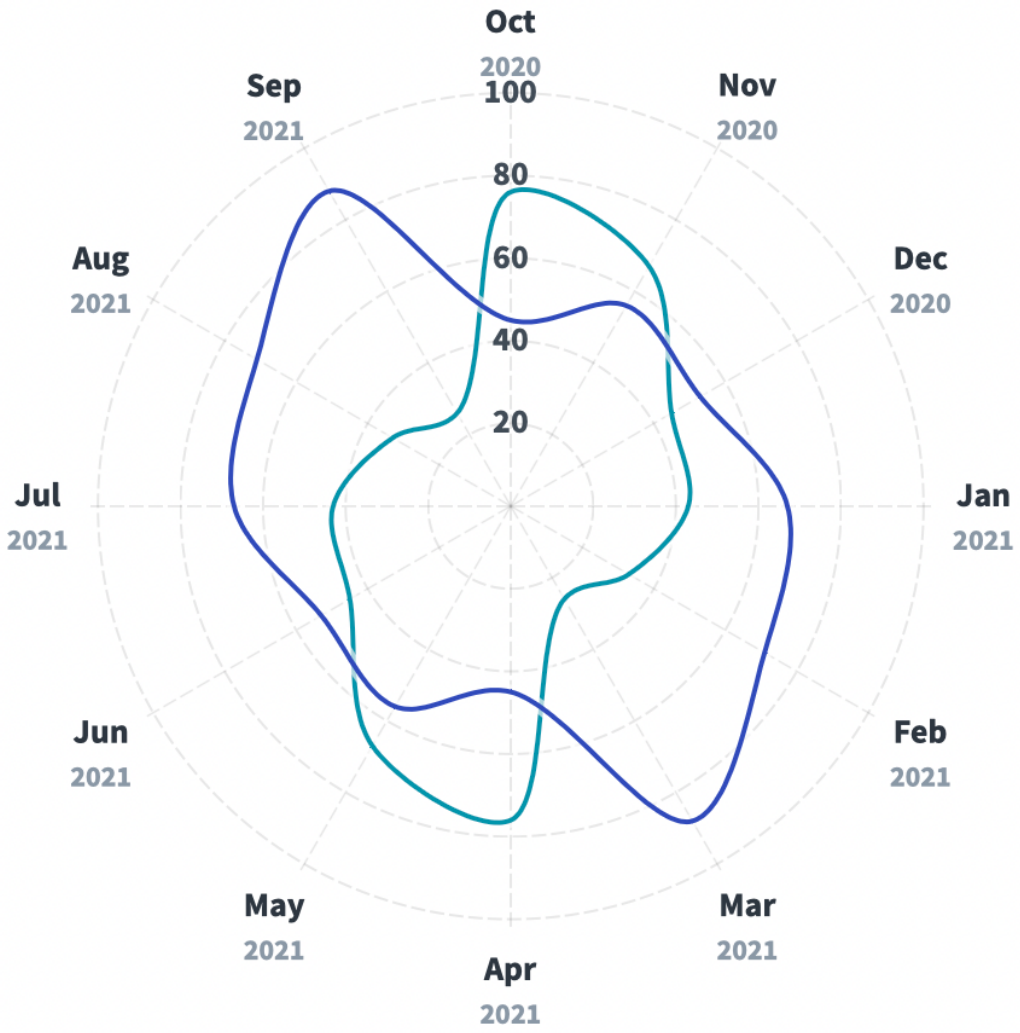
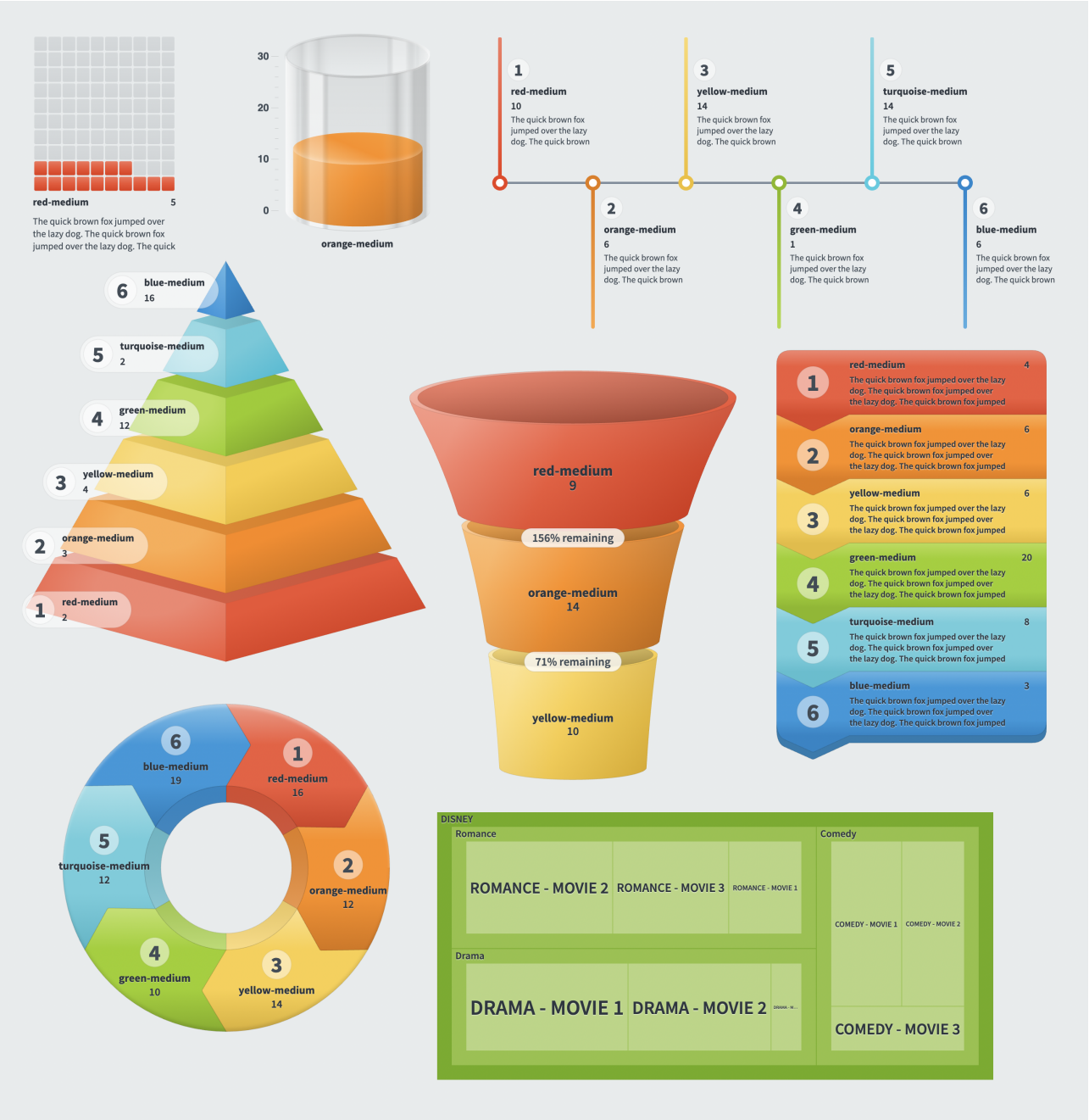


Diagram charts look best on dashboards, and they present infographic-style visualizations.



Datasets

Overview of Datasets

Overview

Spider Impact tracks three types of performance data.

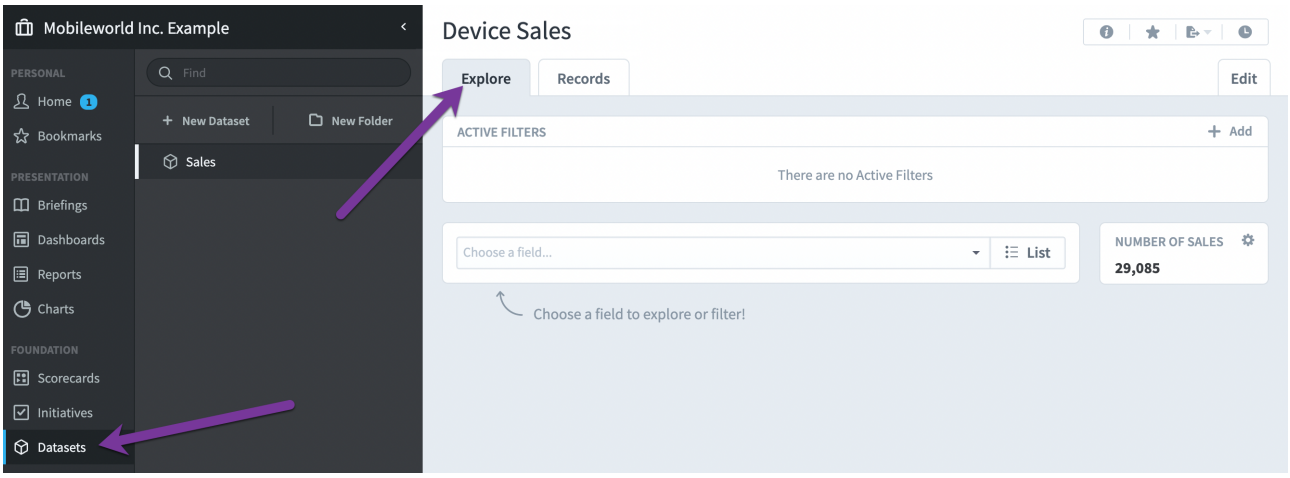
1. Scorecards measure the same things over and over. They're all about setting goals for KPIs, and then using that information to see how you're performing with your big-picture strategy. The KPIs you measure this year will usually be the same KPIs you measure next year.
2. Initiatives are temporary. They have start and end dates and usually last less than 18 months. You put initiatives in place to fix the problems you find in the Scorecards section.
3. **Datasets** track unstructured raw data that isn't scored. They're the business intelligence layer underneath your strategic management. You can analyze and report on dataset data directly, and you can aggregate dataset data to power KPIs in the Scorecards section.



Here we'll focus on Datasets. We'll cover how they're used, and what makes them such a powerful addition to Spider Impact.

The Explore tab

The Datasets section is great for exploring your data and quickly answering questions. It's all about slicing and dicing your data on the fly to get the answers you need immediately.

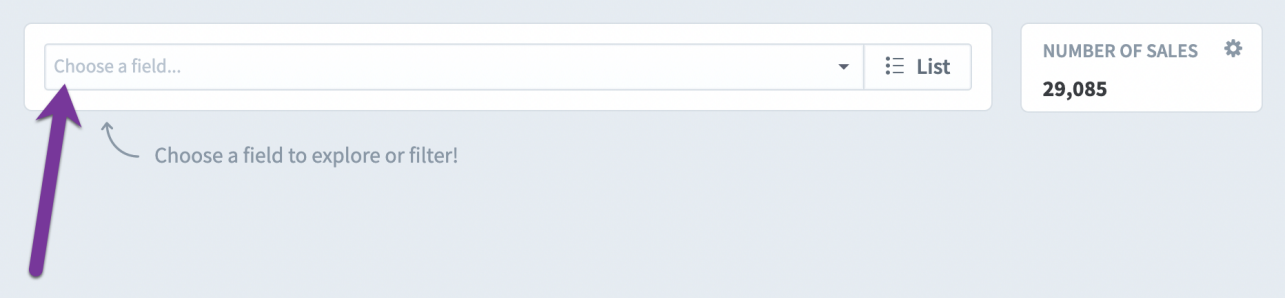


It's important to keep in mind that the Datasets section is not a presentation tool. It's the place where you store and explore all of your data. When it's time to show your dataset data to other people, the Dashboards, Charts, and Reports sections have everything you need.

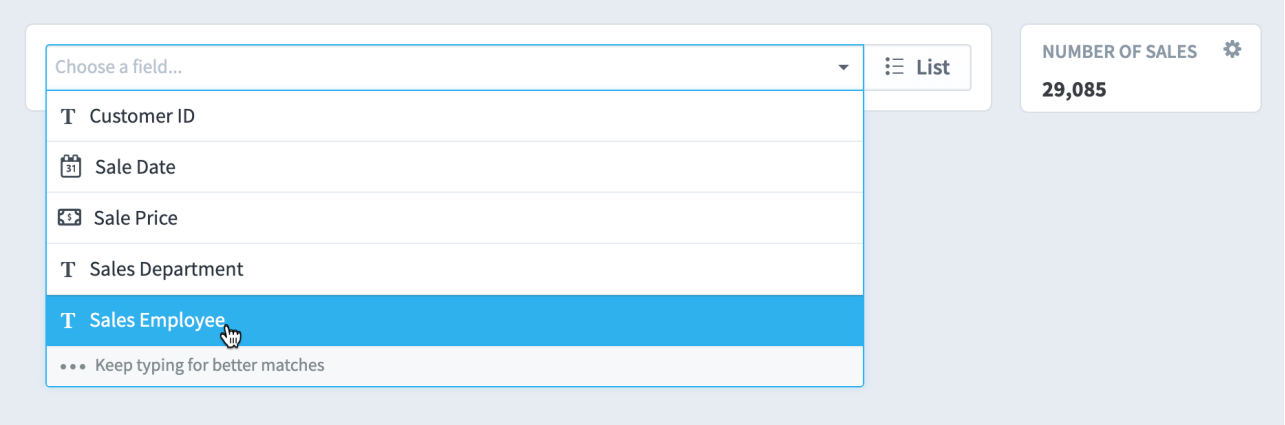
Viewing and filtering fields

We'll start with a Device Sales dataset. It contains information about the 29,085 devices our company has sold. At this point we don't know much about the data, so we'll start to explore.

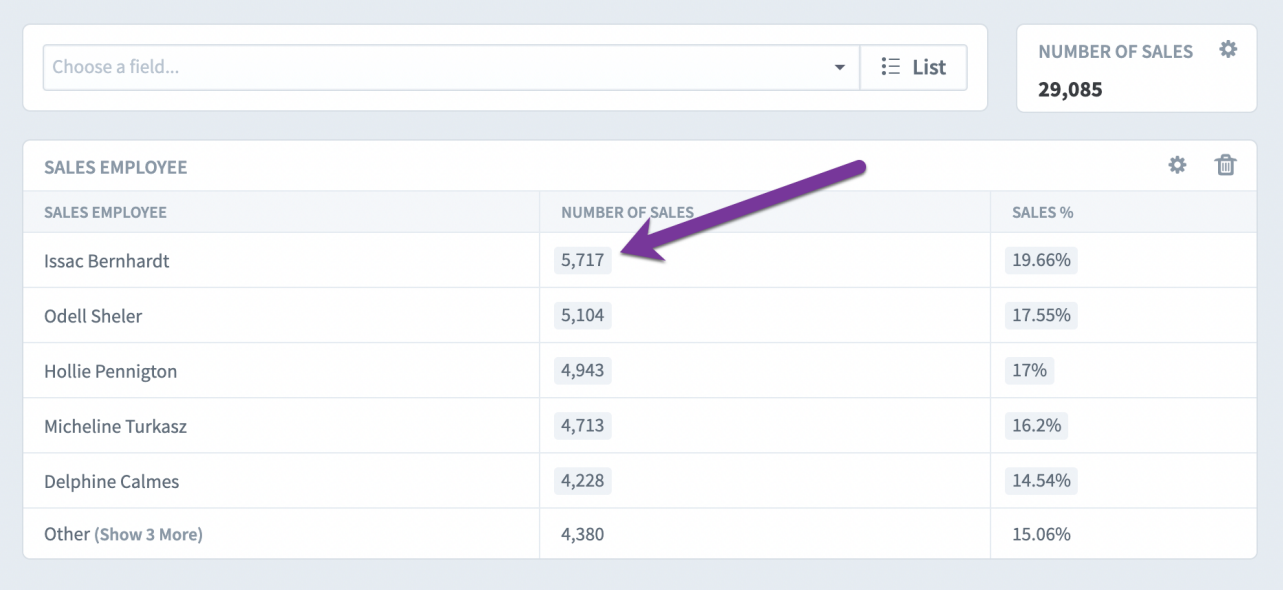
To choose a field to view, click on the field menu.



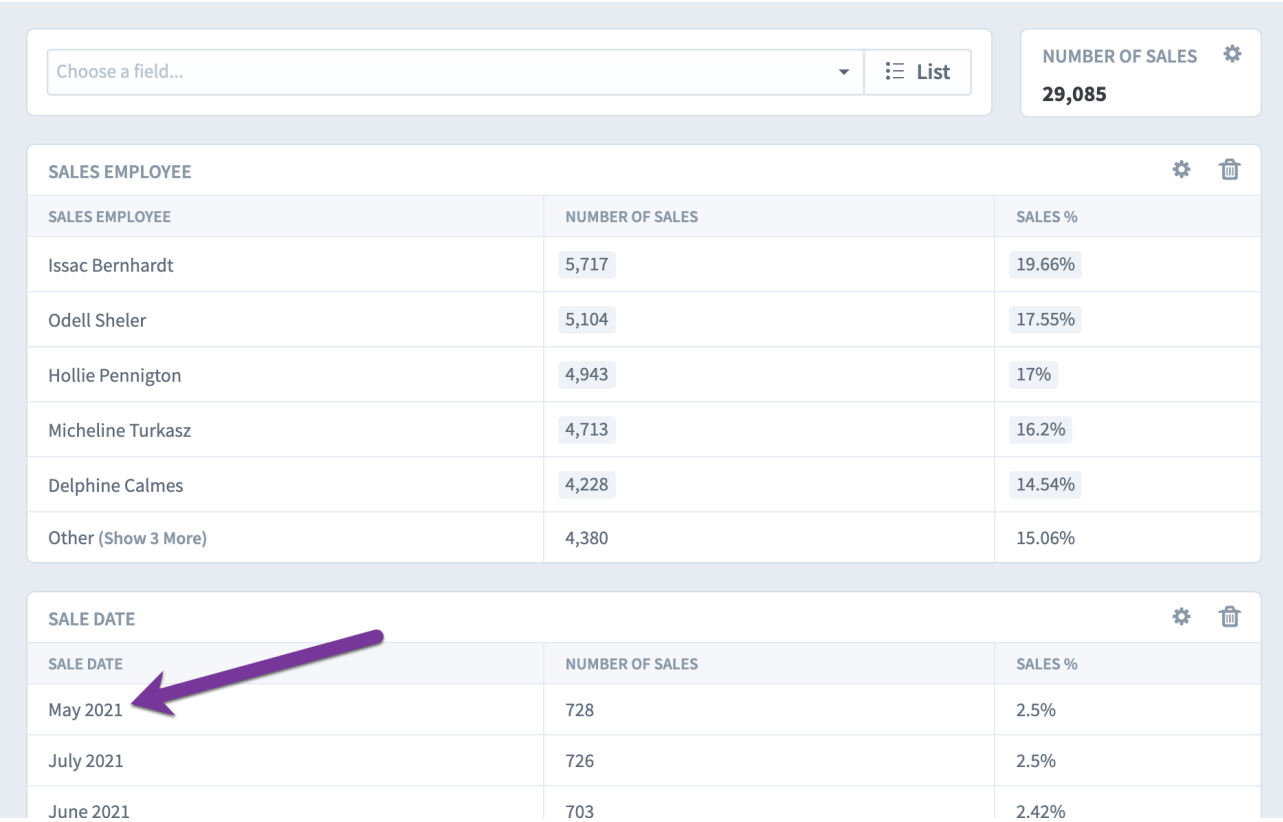
This lists all of the dataset's fields. As you can see, there's information about things like the sale date, the price, and the customer. We'll chose Sales Employee.



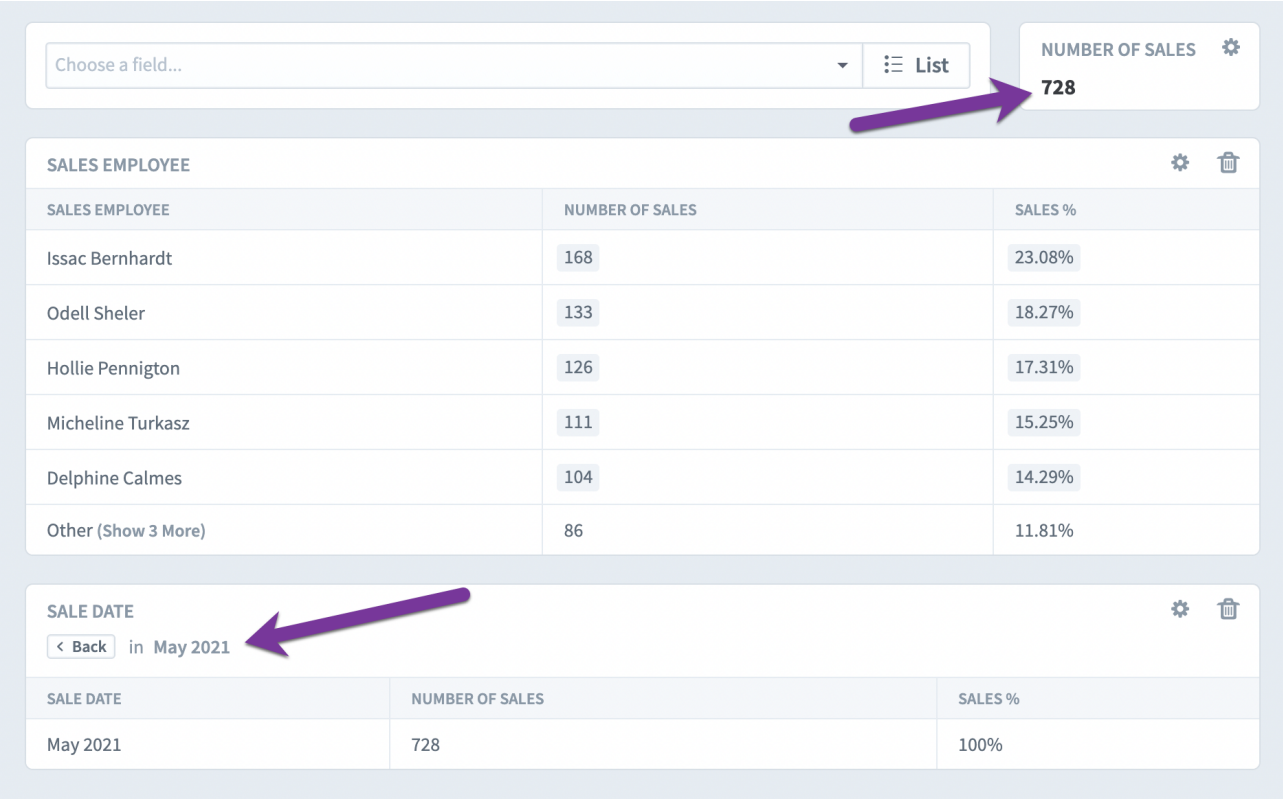
This adds a table breaking down all of the sales in this dataset by sales employee. Issac Bernhardt is in the lead with 5,717 sales.



Next, we're going to choose the Sales Date field in the main field menu. This adds another table that breaks the sales down by date. As you can see, May 2021 was our best sales month.



If we want to see only the sales for May 2021, we can just click on that row in the Sale Date table.



This applies a "*Sale Date = May 2021*" filter to all of the data on the screen. In the upper right corner, we can see that the number of sales has been updated to 728. All of the numbers in the Sales Employee table now reflect only May 2021 sales. To remove the filter, just click the back button in the Sale Date table.

Although you can do advanced data exploration on the Datasets Explore tab, this is what most of your analysis will look like. You choose fields to view, and then you click on a row to filter.

Forms

Overview of Forms

Forms is a section in Spider Impact that allows you to build forms that add and update dataset records. It's perfect for supplementing datasets with additional fields that aren't tracked in the system of record, but it's also great for collecting and managing data that isn't stored in any system of record.

Before we get into the details of the Forms section, let's cover why this functionality is important. There are three types of data that Spider Impact tracks.

- Scorecards (KPIs) are updated on regular basis and are tracked forever. Each KPI has a single value for every period.
- Initiatives have a start date and an end date and usually last around 18 months. They are updated irregularly and have two values (budget and percent complete).
- Datasets track large amounts of unstructured data. Instead of tracking a single value (KPIs) or two values (Initiatives), dataset records can have dozens of values. For example, first name, last name, phone number, etc.

All three types of data can be updated through outside sources like spreadsheets or database connections. They can also be manually updated directly in Spider Impact.

KPIs and Initiatives have very specific data formats, and Spider Impact already has great update forms for them. People can log into Spider Impact and use the built-in forms to quickly update all KPI and Initiative values for the items that they own.

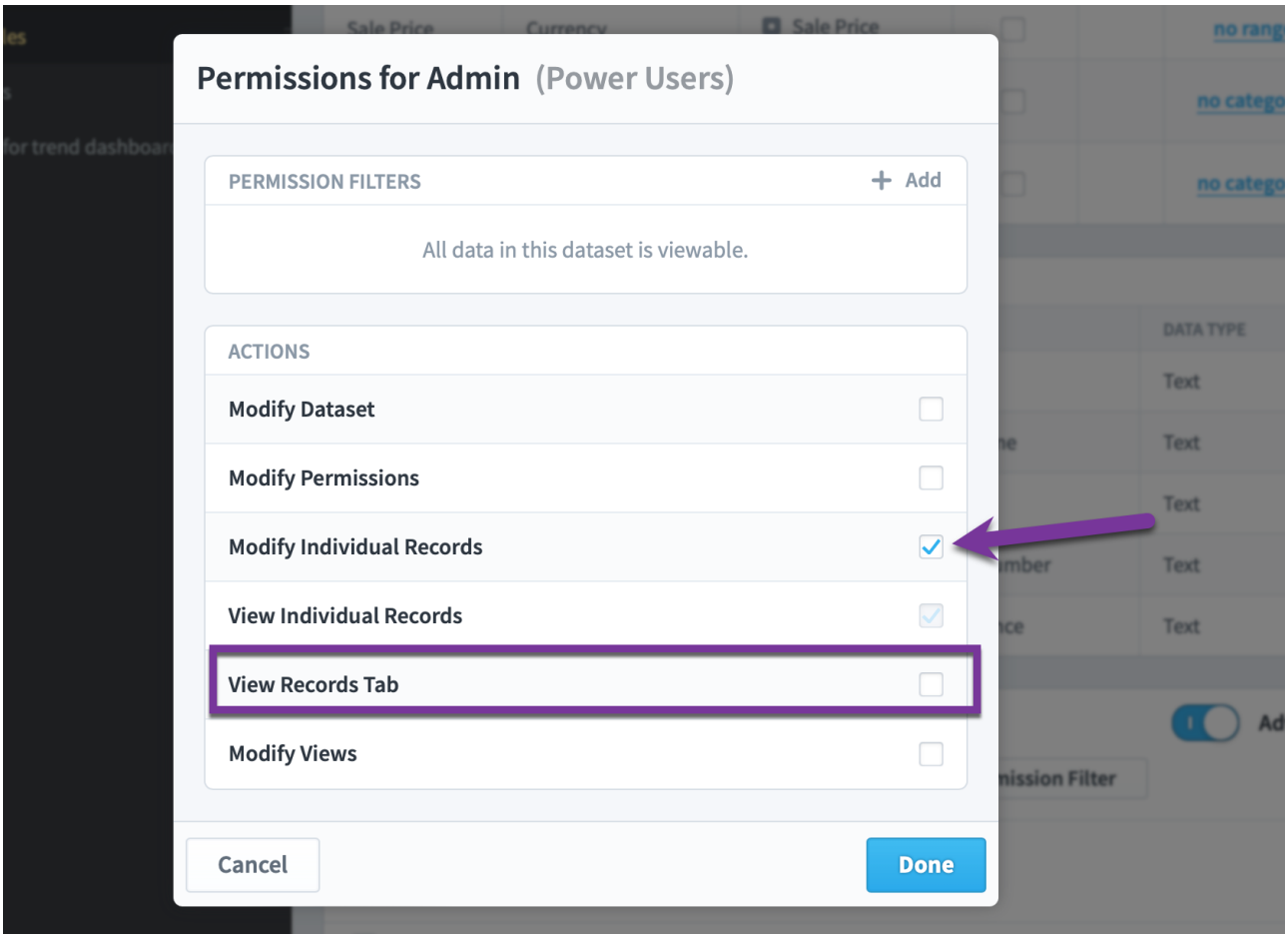
There is, however, no universal form to update dataset values or create new dataset records. That's because datasets have unstructured data and can have

dozens of fields. That's what the new Forms section is all about. It allows people to build the forms that they need to manually put data into Datasets.

Security and permissions

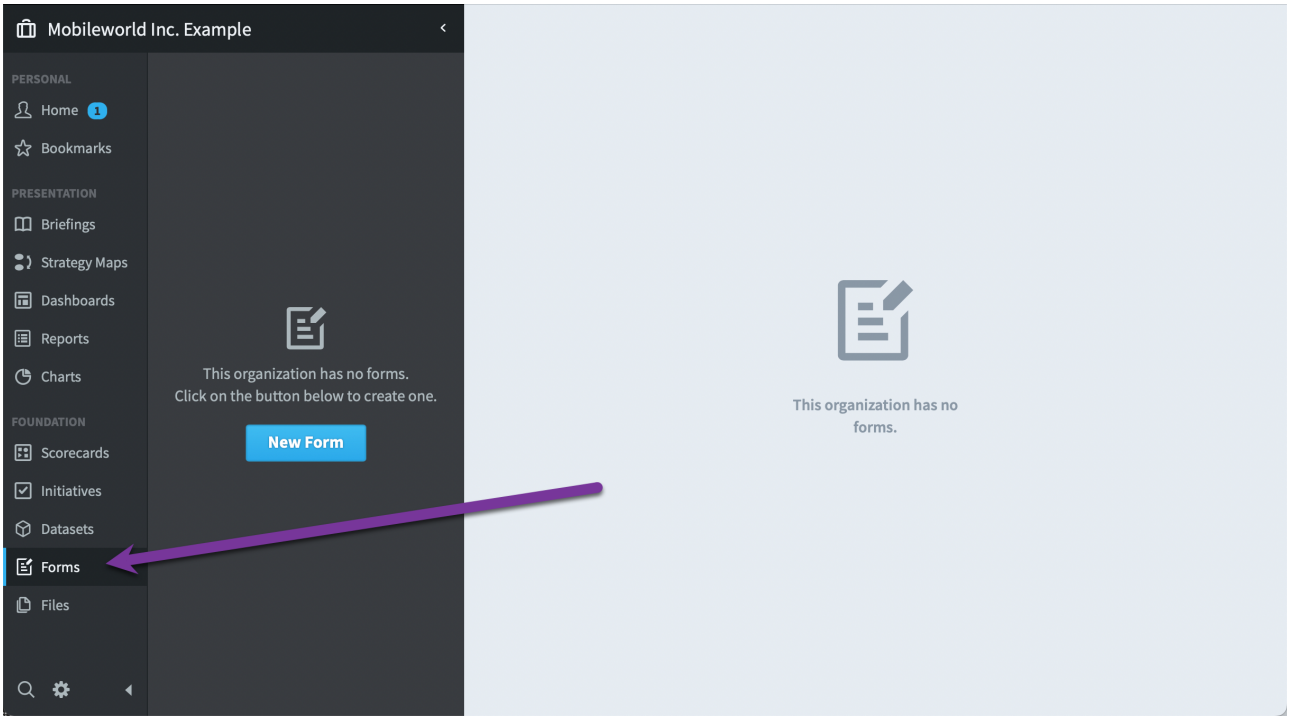
Forms inherit their permissions and security from the Datasets section. You only have permission to view, add, or modify records in a form if you have permission to do the same thing in the Datasets section. If you only have permission to view some of the records, you'll only see some of the records in the Forms section.

If you want someone to be able to edit records in a form but not on the Datasets Records tab, however, you can give them permissions to "Modify Individual Records" but not "View Records Tab".

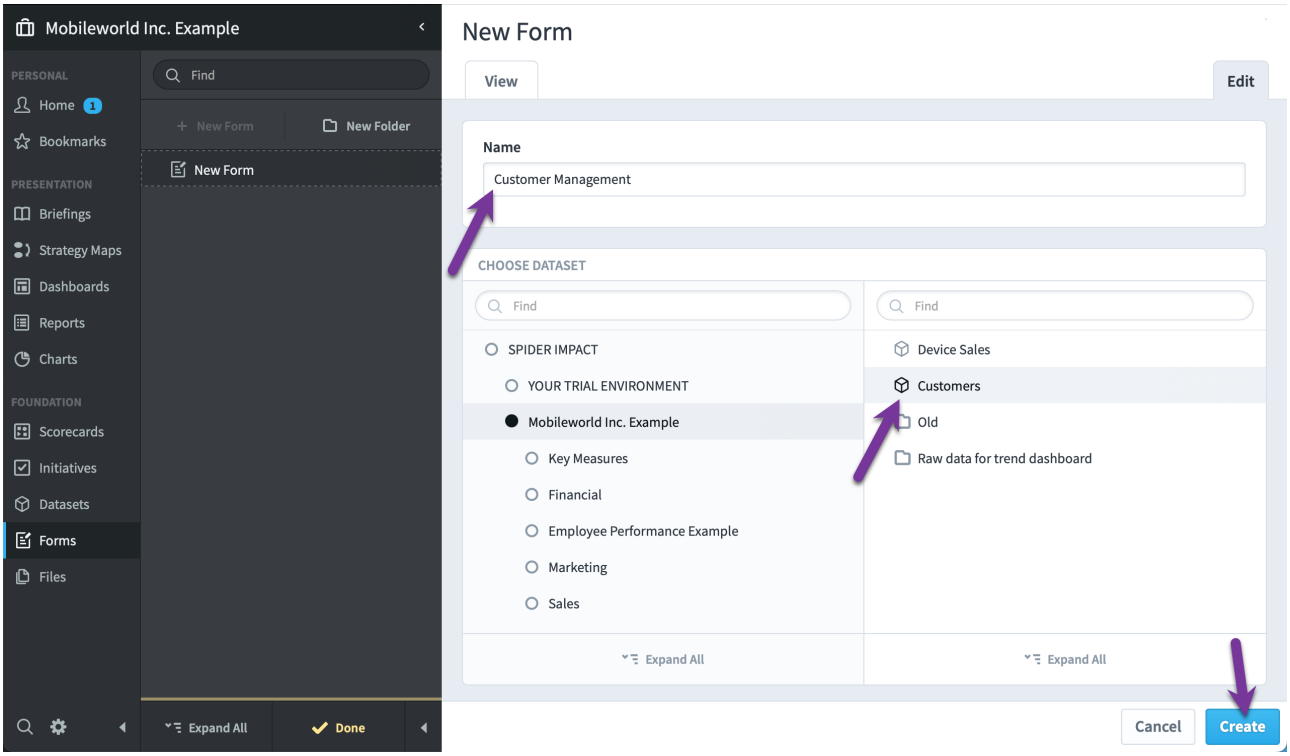


Creating Forms and form pages

The Forms section in Spider Impact is in the menu pane on the left.

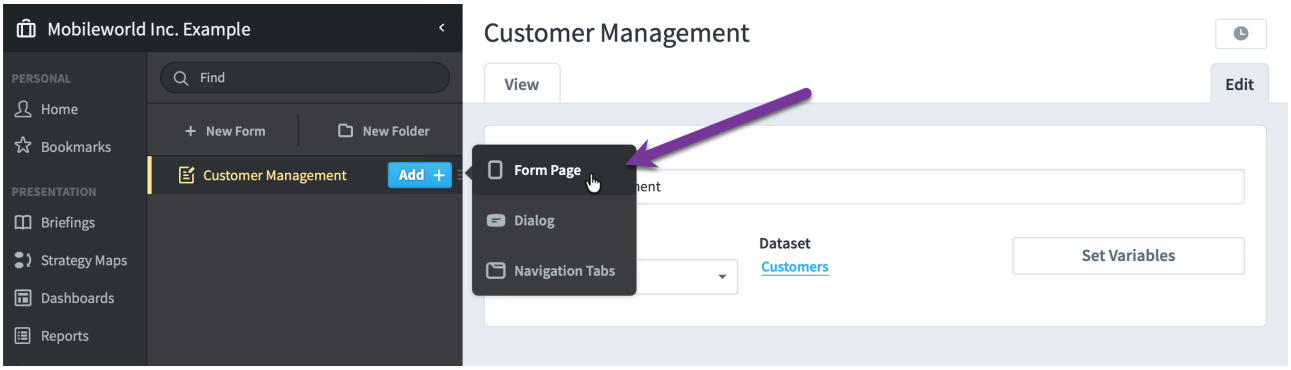


To create a new form, click the "New Form" button and choose a dataset. Each form is associated with a single dataset, and that's what you're choosing right now. In this example we'll choose the Customers dataset, name the form "Customer Management" and then click the Create button.

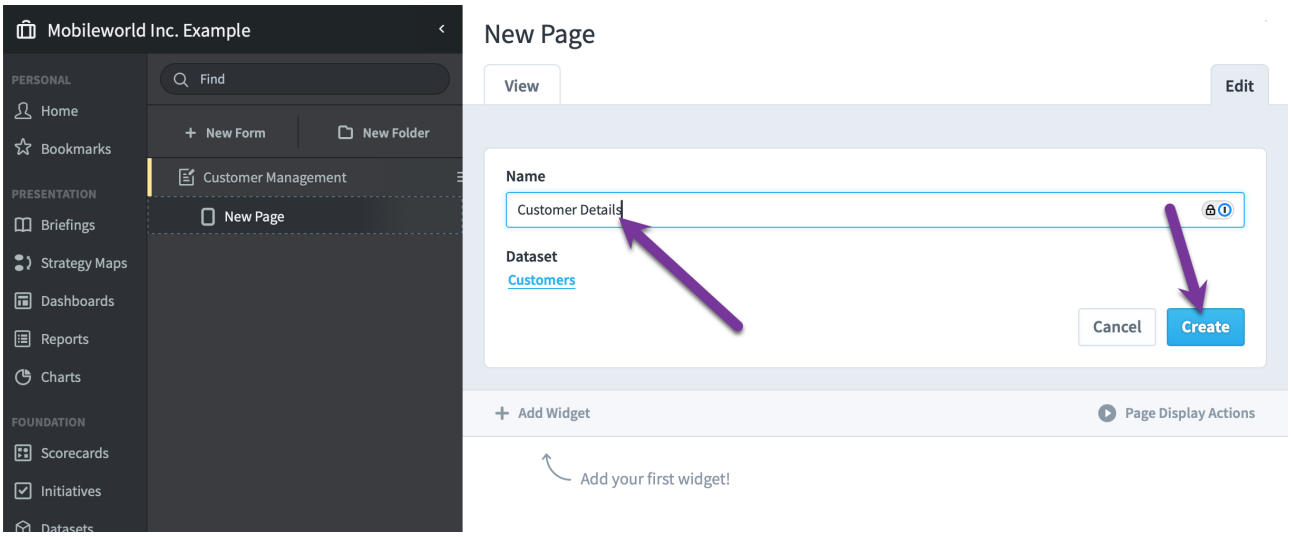


Now that our form is created, we'll want to add the first page to the form. We'll click the "Add" button and choose "Form Page" from the Add menu.

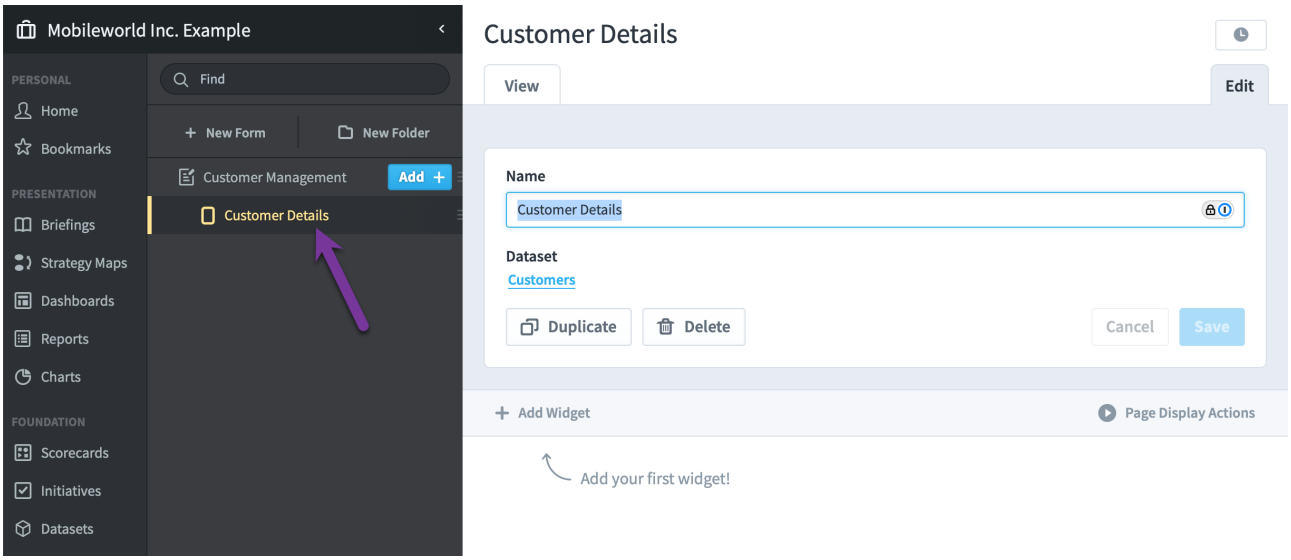
- Form Page
- Dialog
- Navigation Tabs



We'll call this new page "Customer Details".



We now have a form for the Customers dataset with one blank page.

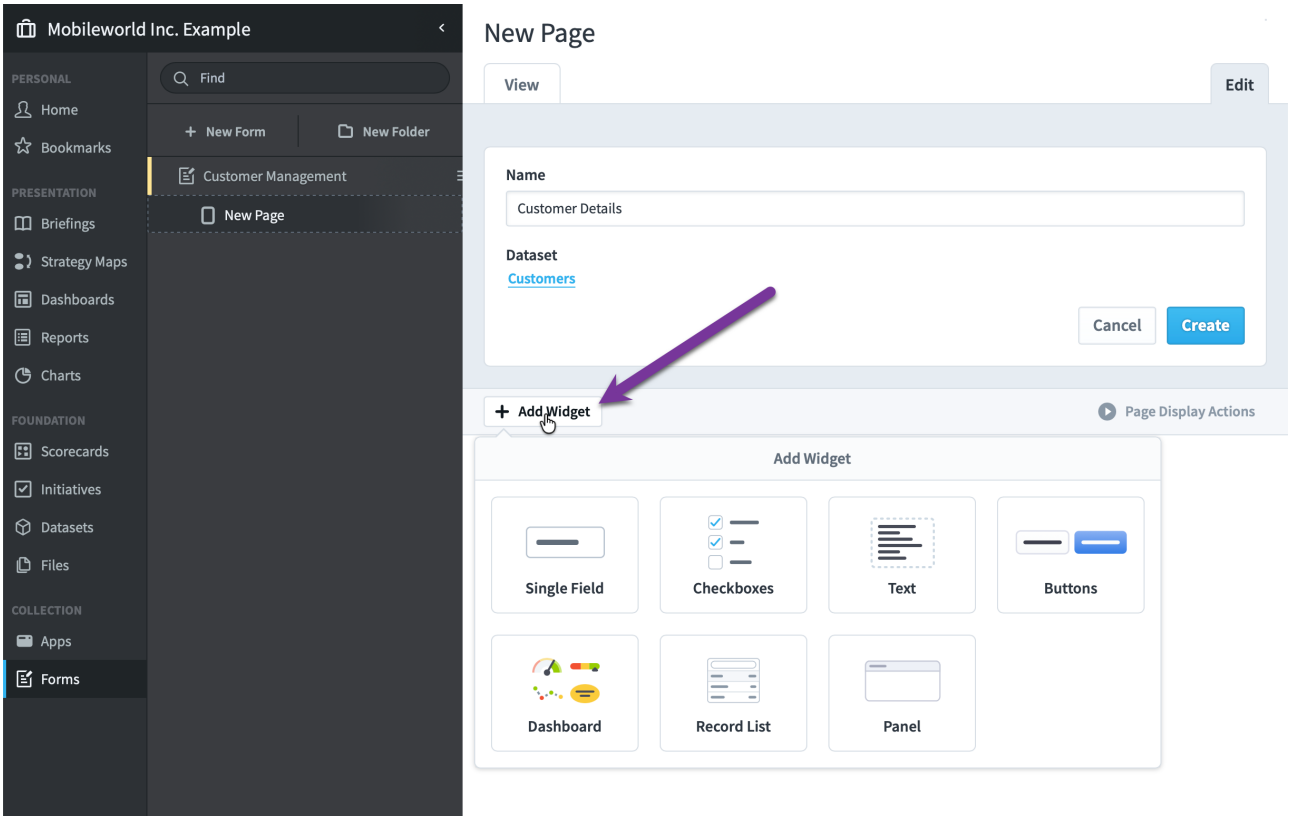


Adding form widgets

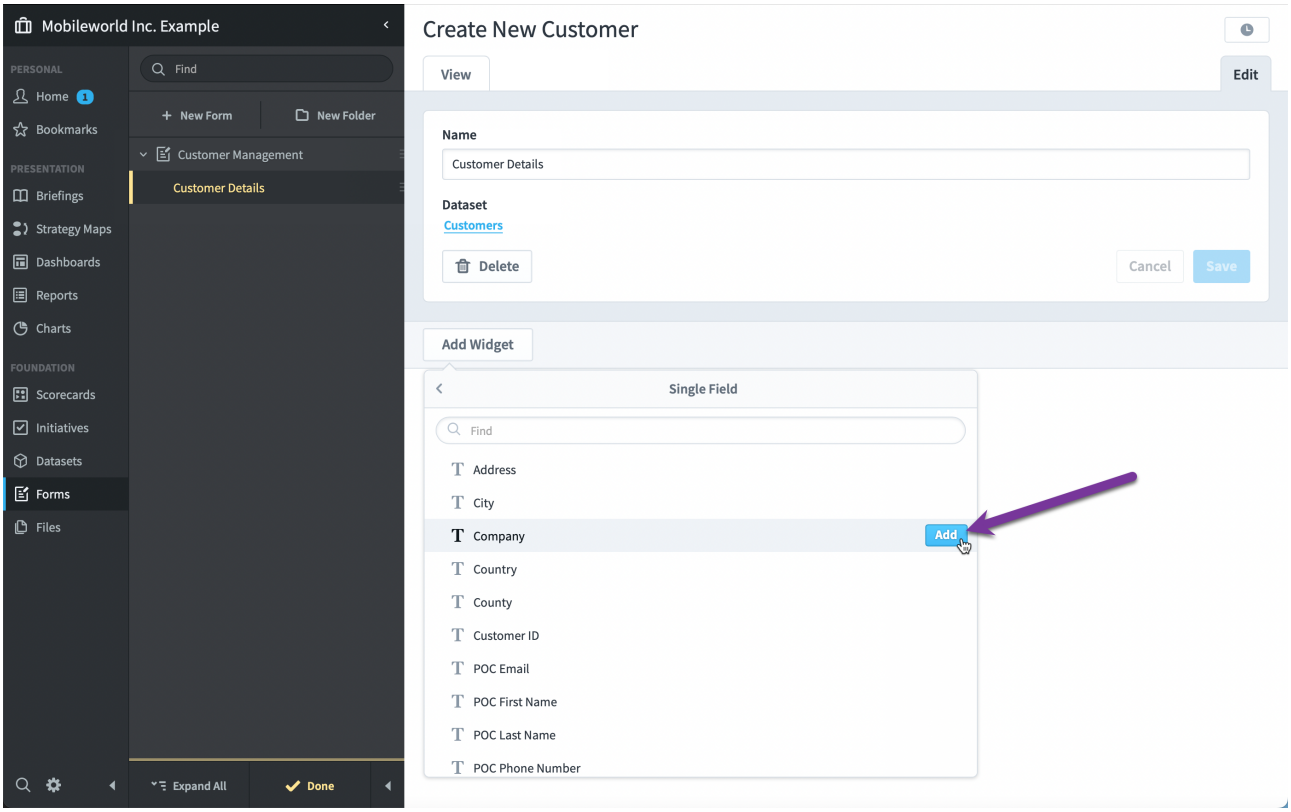
To add form widgets to a form page, click the "Add Widget" button. You can choose to add one of the following widgets, all of which are explained in detail below.

- Single Field
- Checkboxes

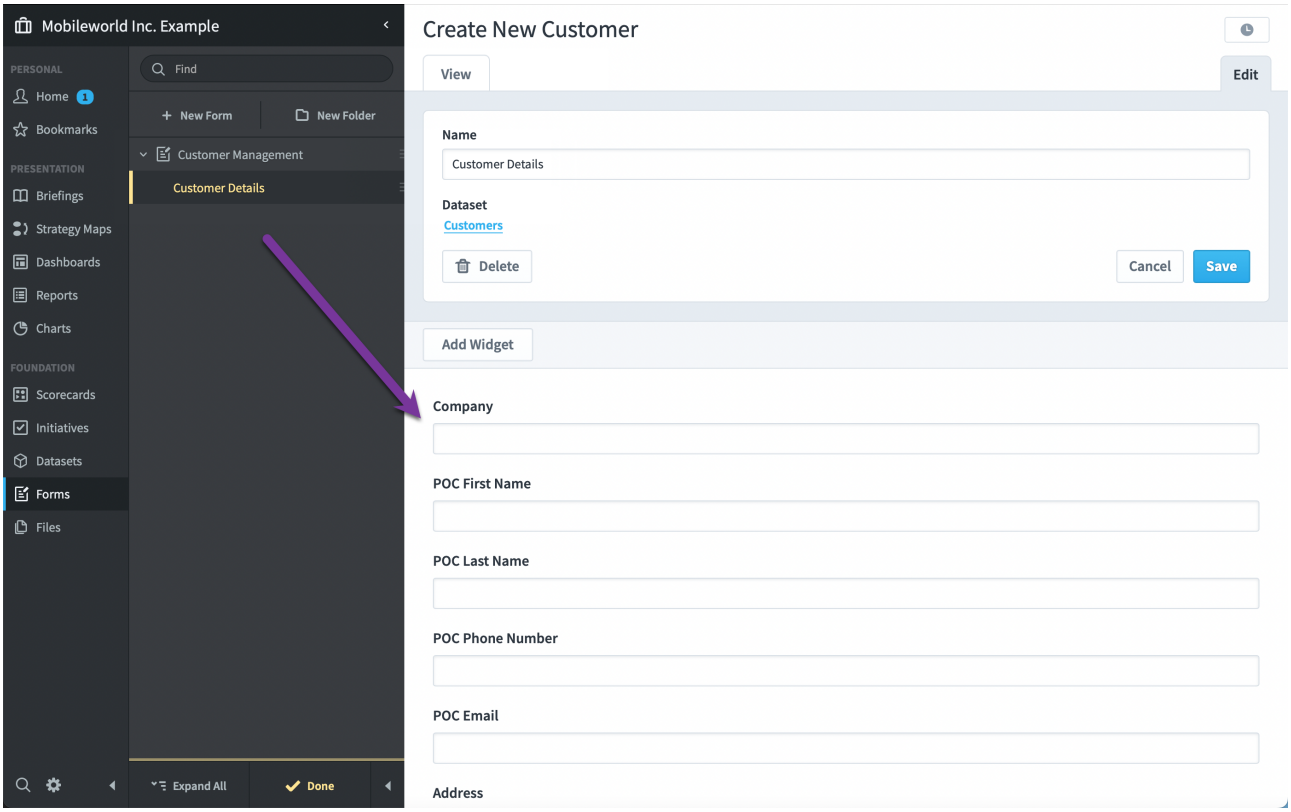
- Text
- Buttons
- Dashboard
- Record List
- Panel



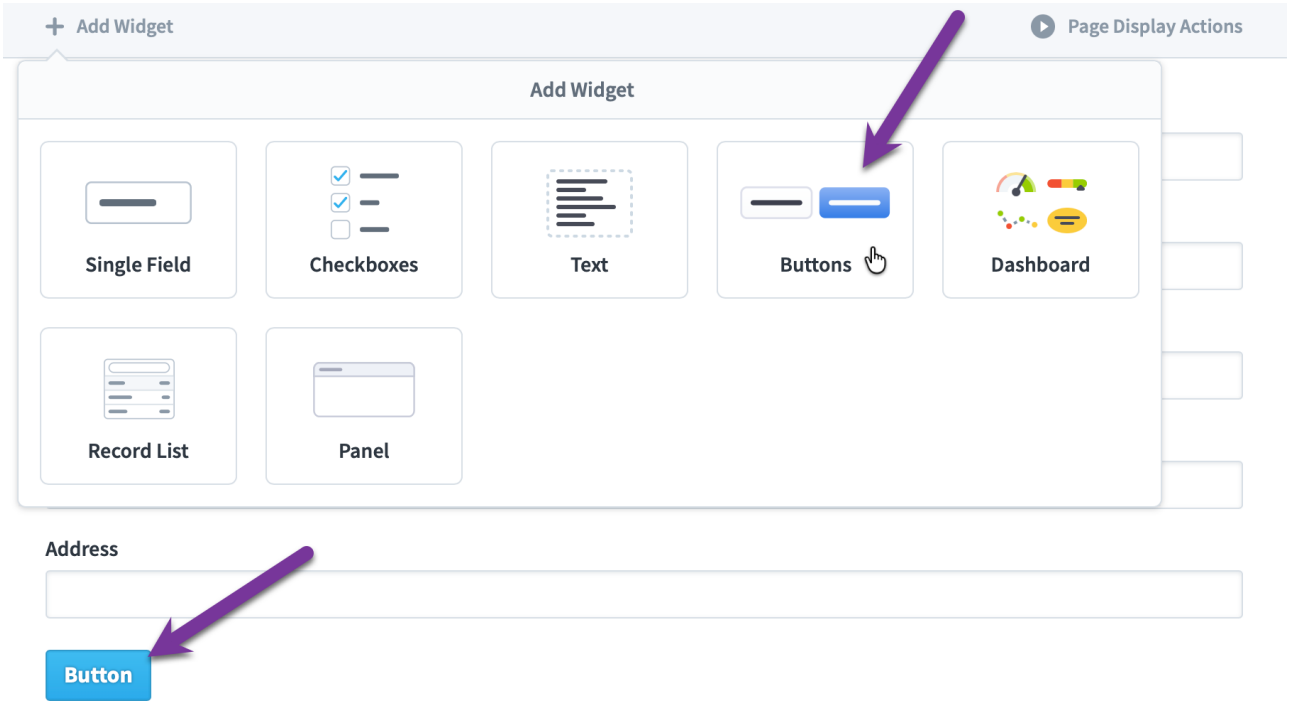
We'll choose Single Field widget, and then we'll start adding widgets for the Customer dataset's fields.



It looks like this when we're done.

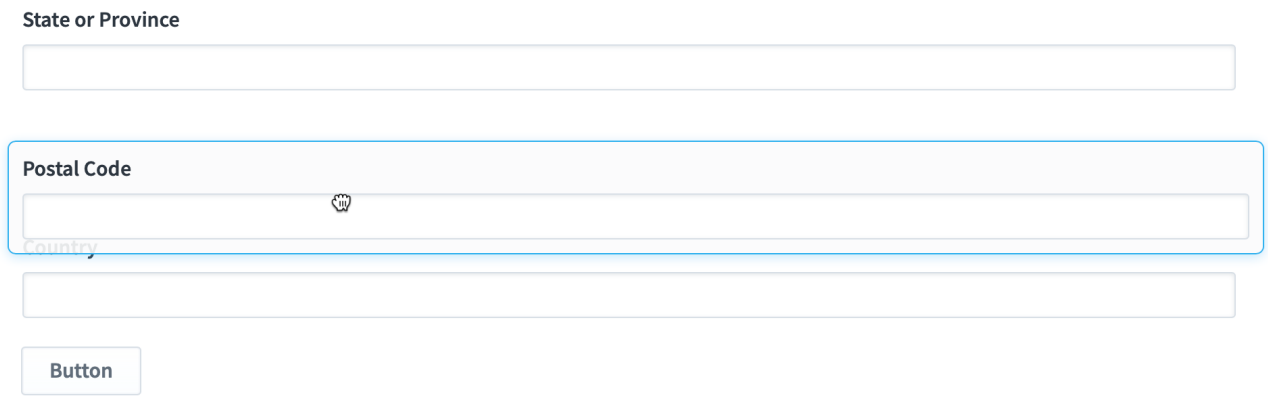


We'll also add a buttons widget.

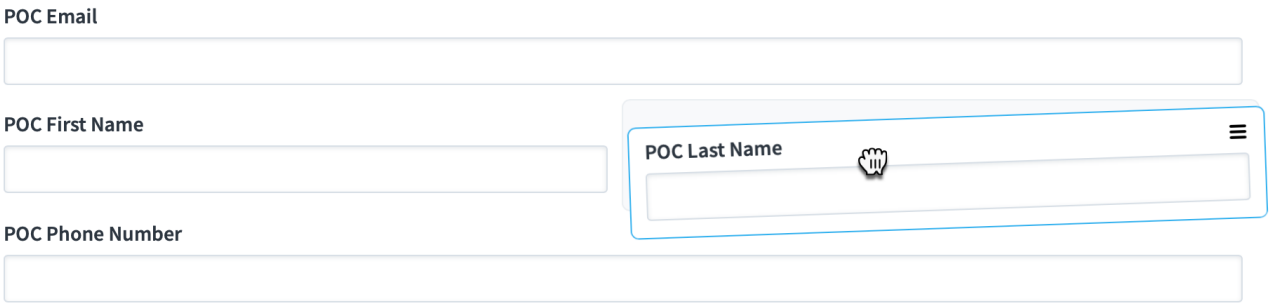


Arranging form widgets

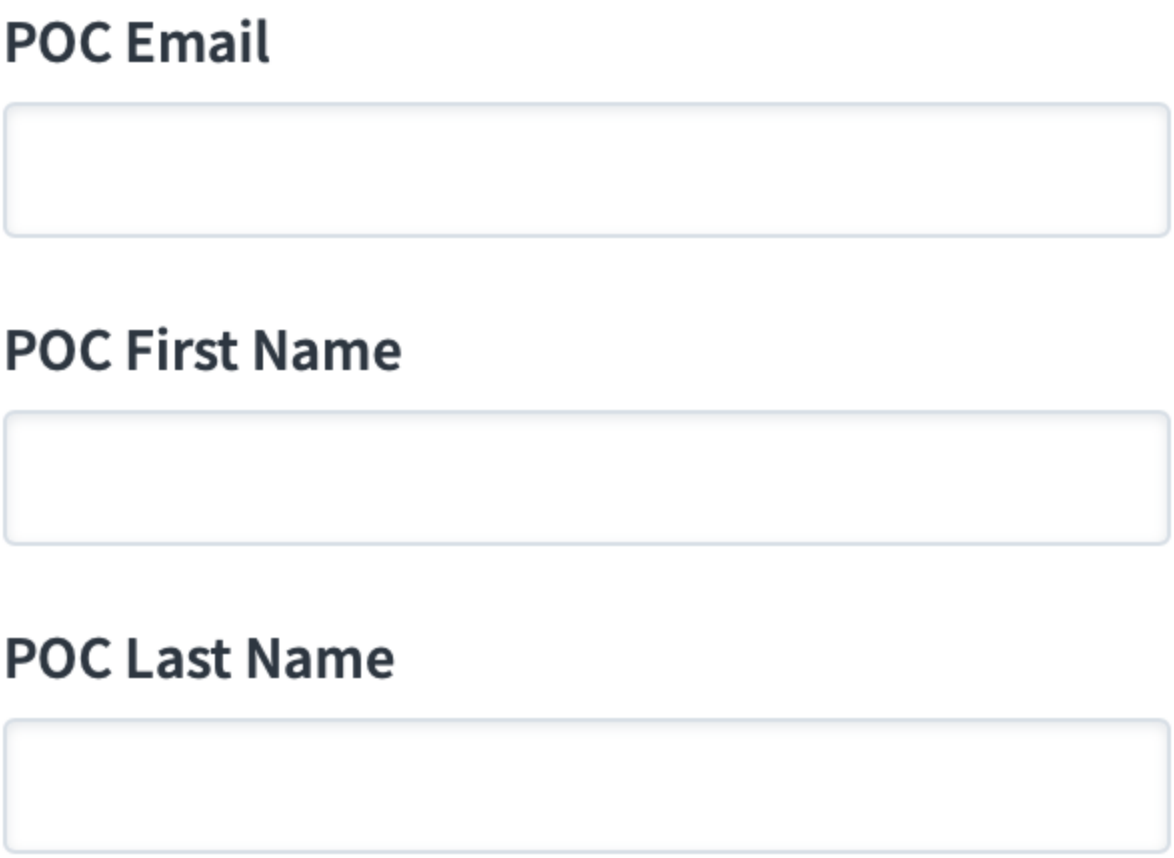
New form widgets are added at the bottom of the page, but you can drag and drop widgets to reorder them.



You can also create multi-column form structures for a more organized and compact design.

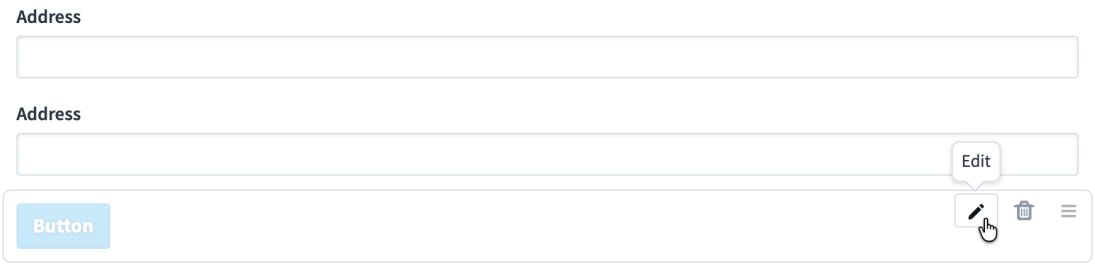


Multi-column layouts automatically collapse into a single-column format on mobile devices to ensure a seamless experience across all screen sizes.

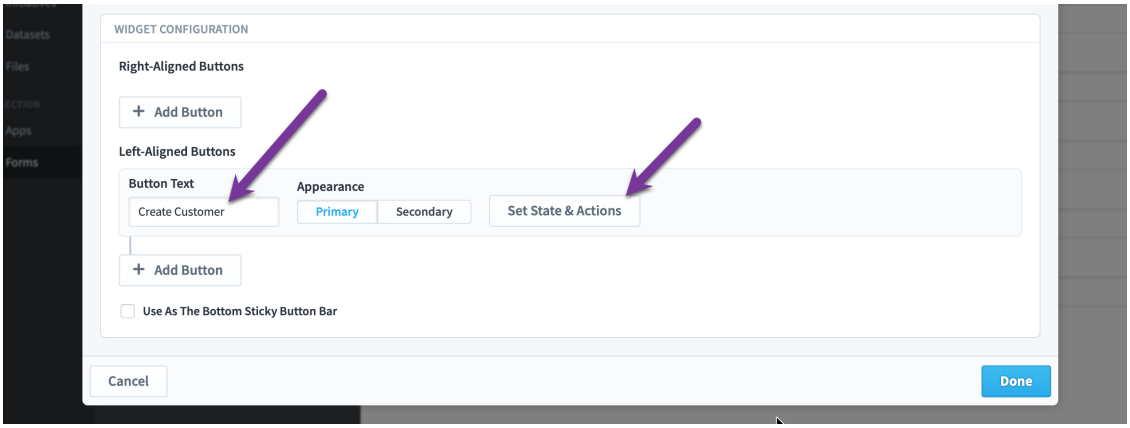


Editing form widgets

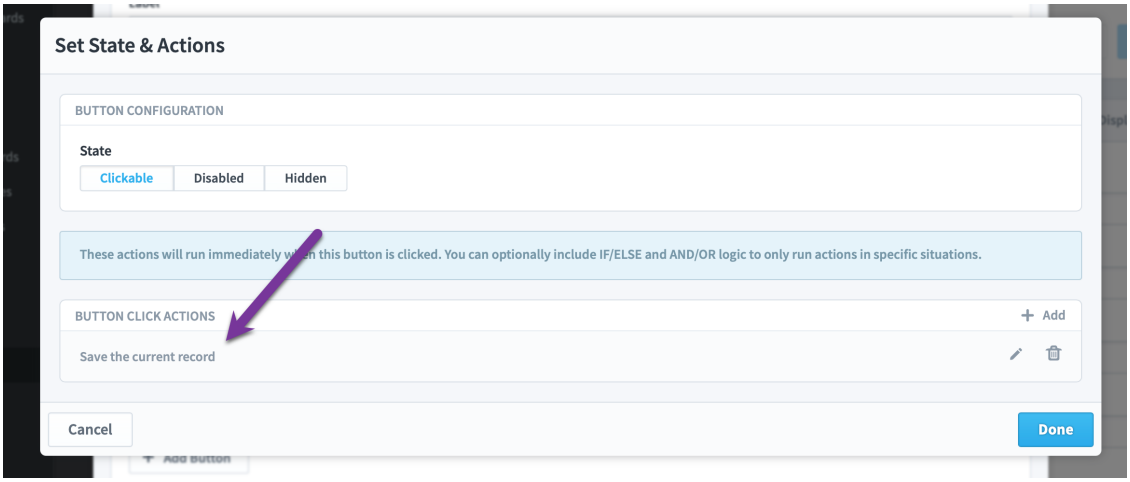
To edit a widget, just click its Edit button.



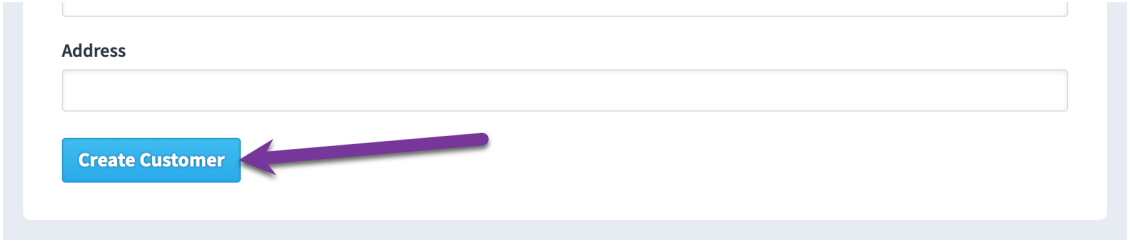
This opens the Edit Widget dialog where we'll change the button text to “Create Customer” and click "Set State & Actions".



This opens a second-level dialog where we'll set the "Save the current record" action to fire on click. See the Form Actions, Variables, and Logic article for more information.

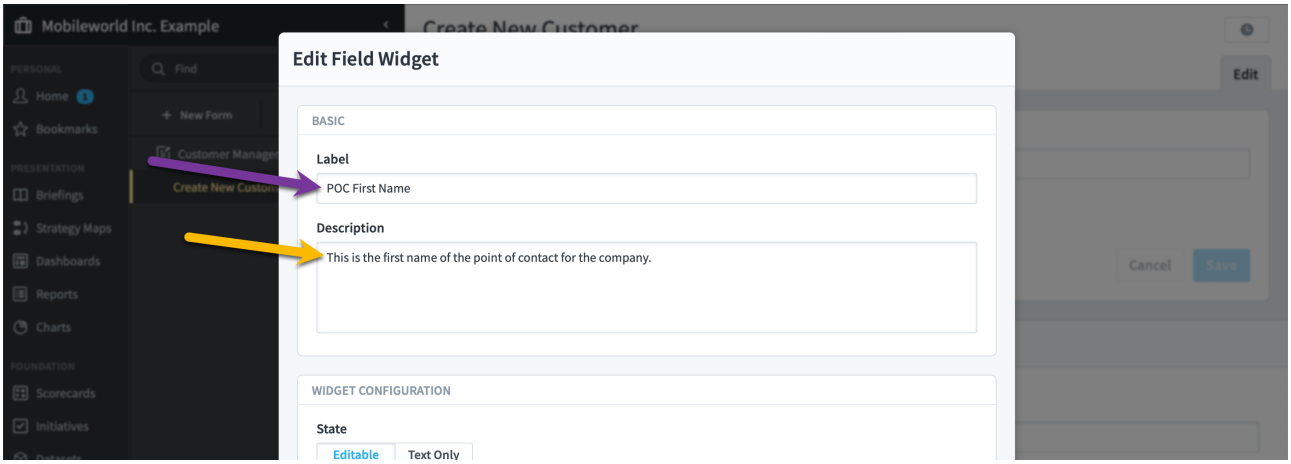


This is what the button looks like when we're done.

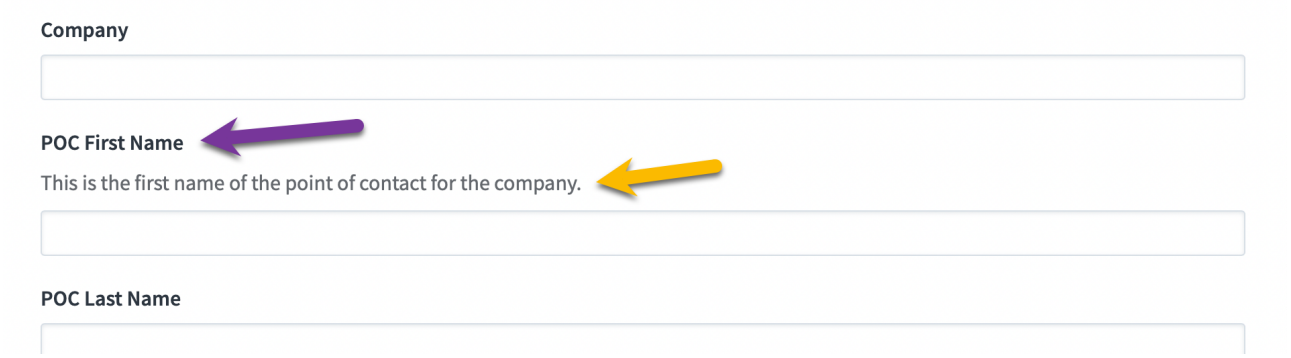


Widget labels and descriptions

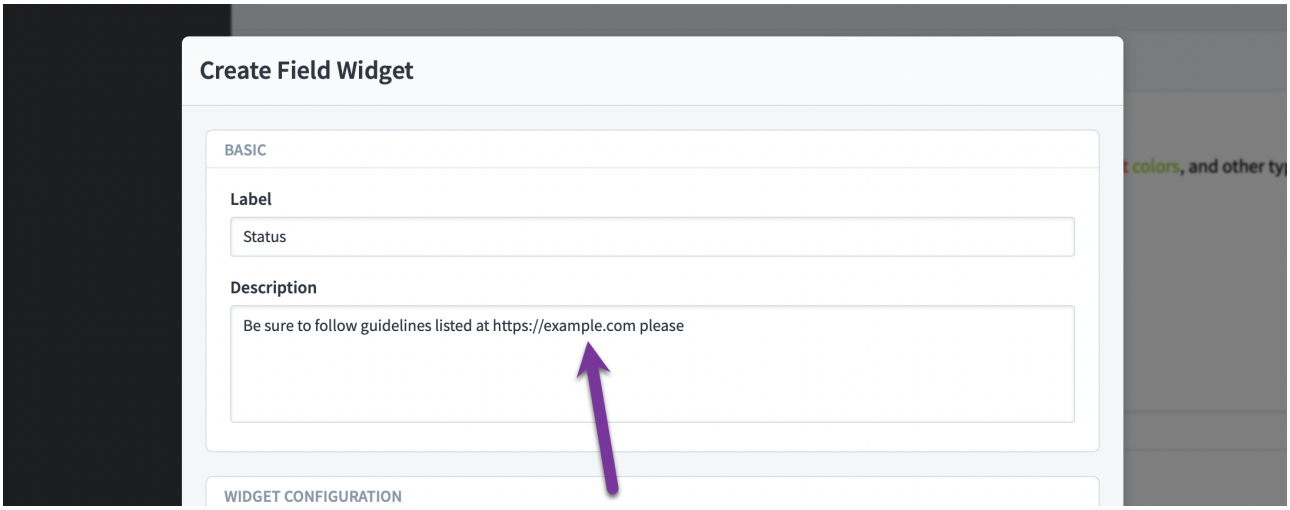
Each type of form widget has different configuration options that are explained in detail below. The two things that are shared by every type of widget, however, are the Label and Description. Both are optional.



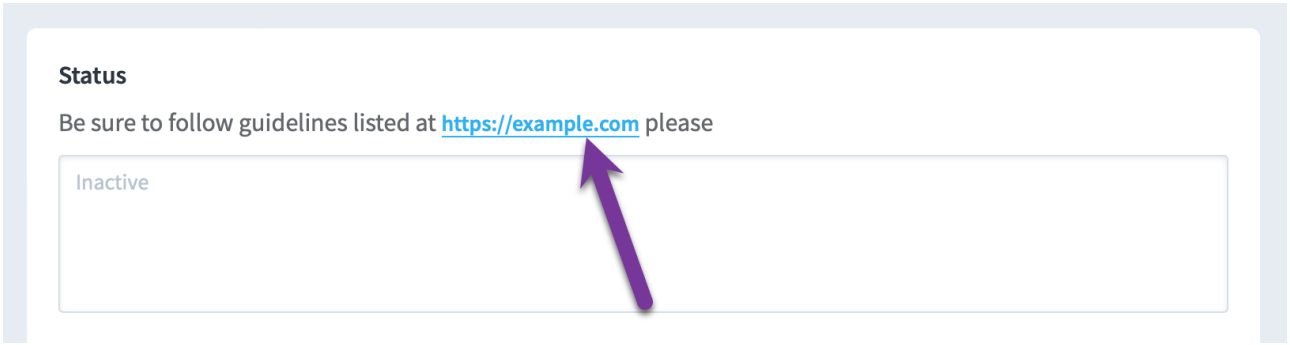
This is what labels and descriptions look like on the form.



Note that all URLs in form widget descriptions are automatically turned into links. In this example, we've added a link to an external web page in the Status field's description.



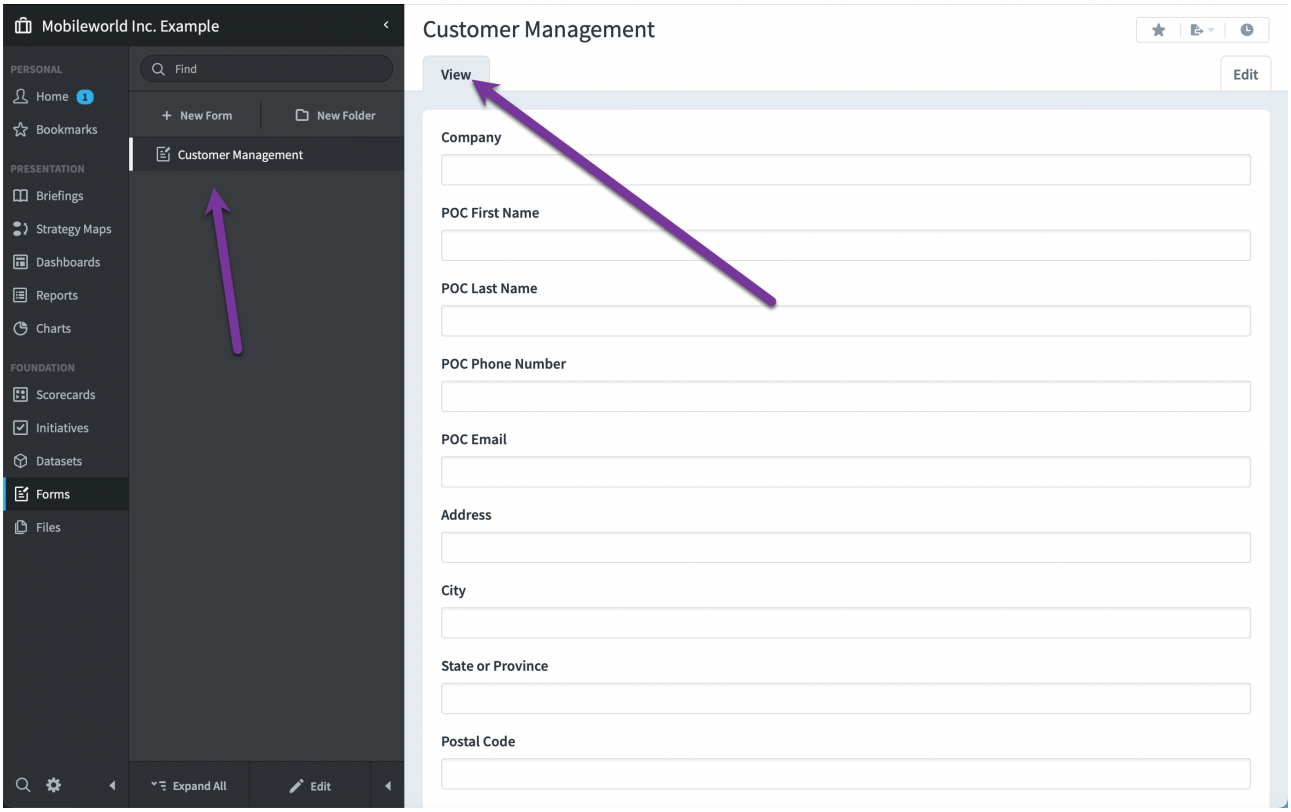
When the form is being used, the link is now styled differently and is clickable.



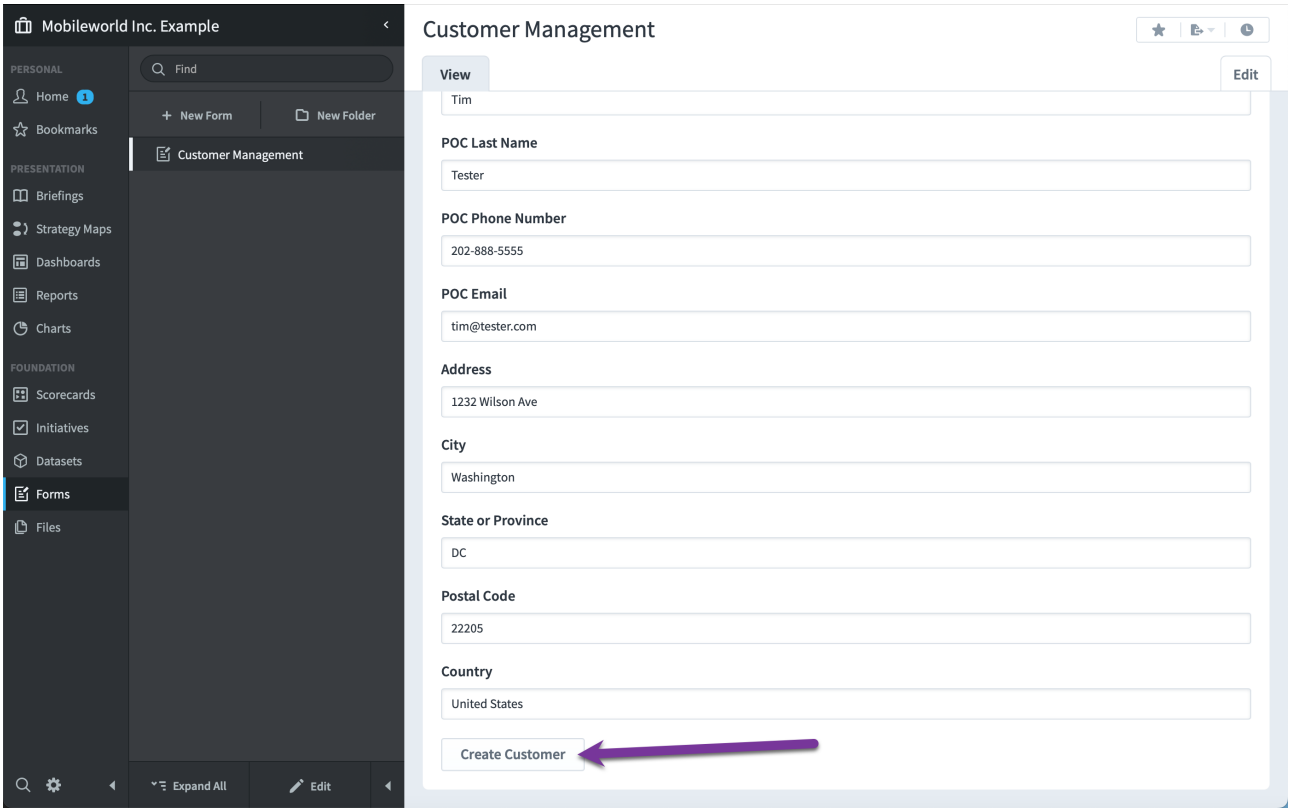
Forms that create records

Example form

The simplest version of a form is a single page that creates a record. To use a form, click the View tab, which is what shows by default when you first visit the forms section. Notice how the individual form pages that you see on the Edit tab no longer show on the View tab.

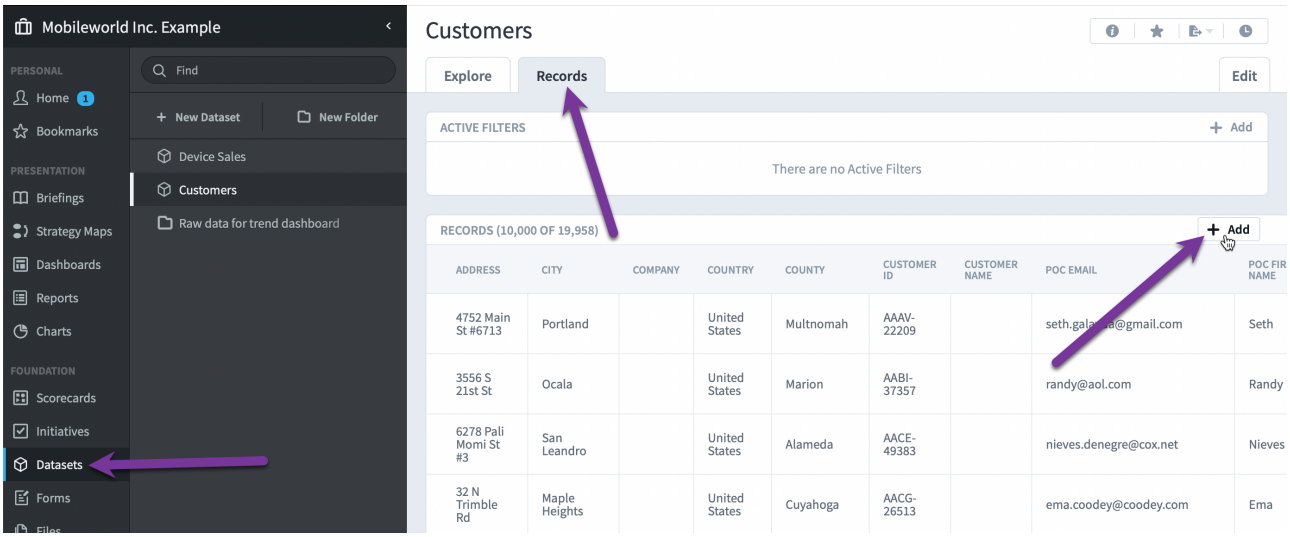


We'll fill out the form with the details for a new customer, and we'll click the "Create Customer" button. This adds a new dataset record for this customer.

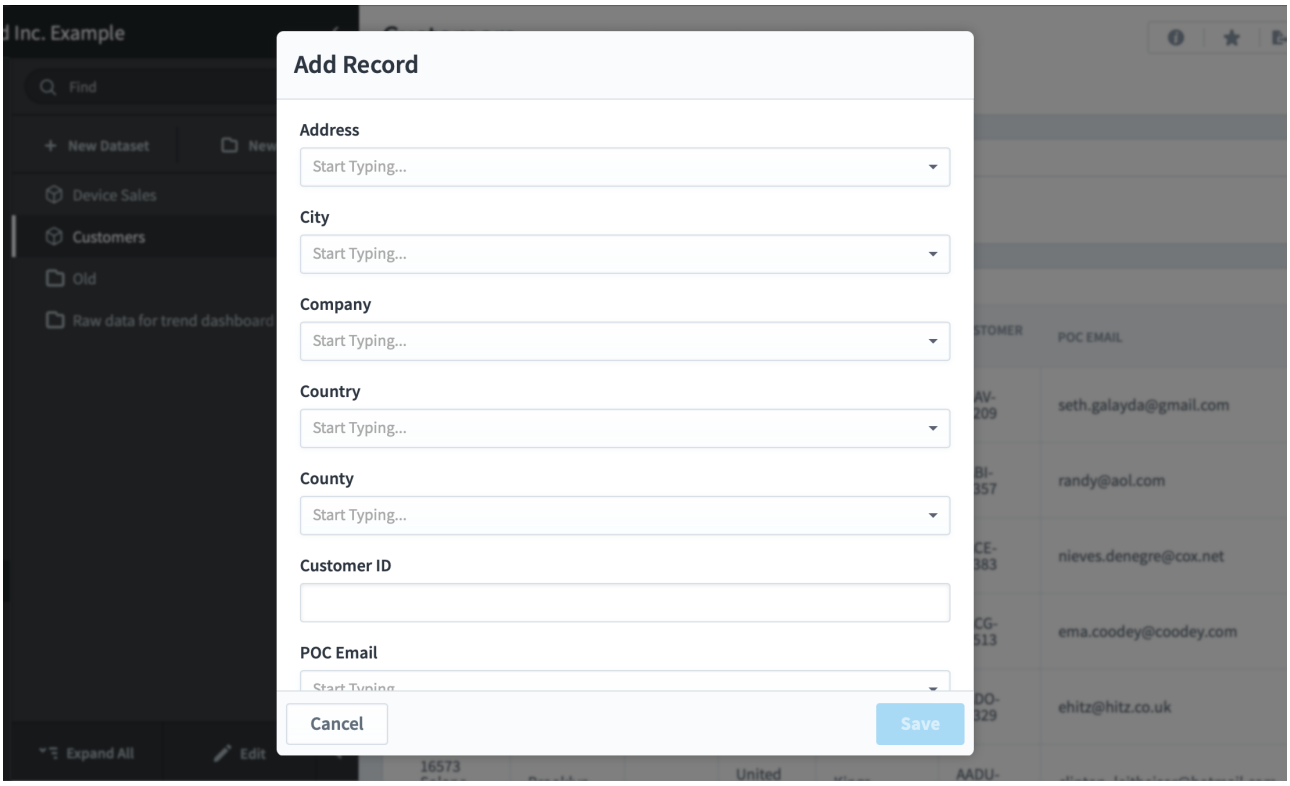


Similarities with Datasets Records tab

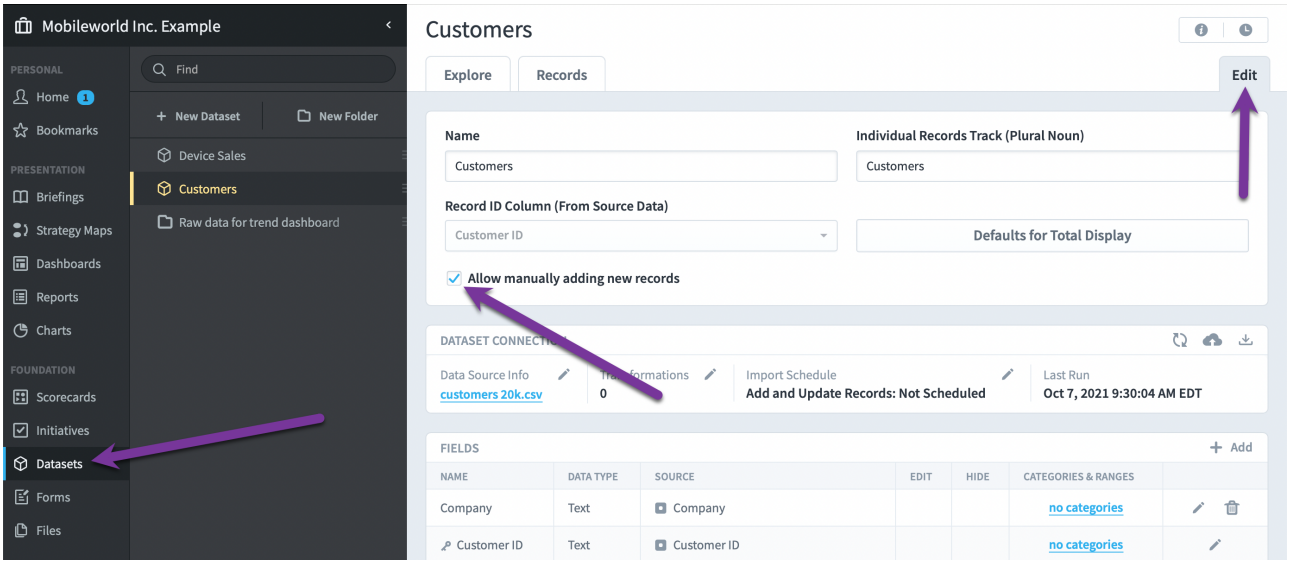
Manually added records will stay in your dataset, even after you import new data with "replace all records". This is the exact same behavior as adding a record on the Datasets Records tab.



The difference with the Datasets Records tab is that you have no control over layout, no way to break data entry into multiple pages, and no way to do logic and advanced data validation. In short, the Dataset Records tab is a simple list of fields, and the Forms section is for building mini-apps to collect data.



All of the user permissions that apply to adding records on the Datasets Records tab also apply to forms. For example, people can only create new records with a form if "Allow manually adding new records" is checked on the dataset's Edit tab. See the Manually Adding & Updating Records article for more information.

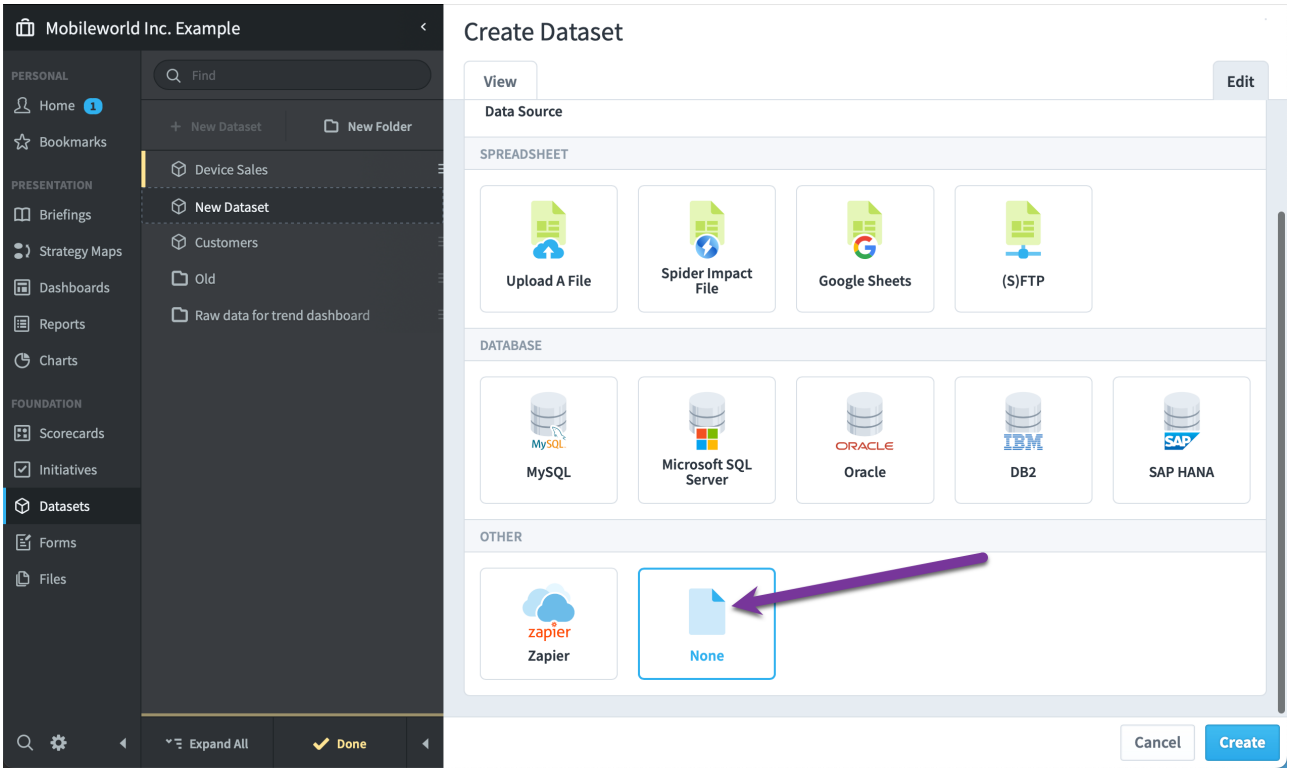


Reasons for adding records

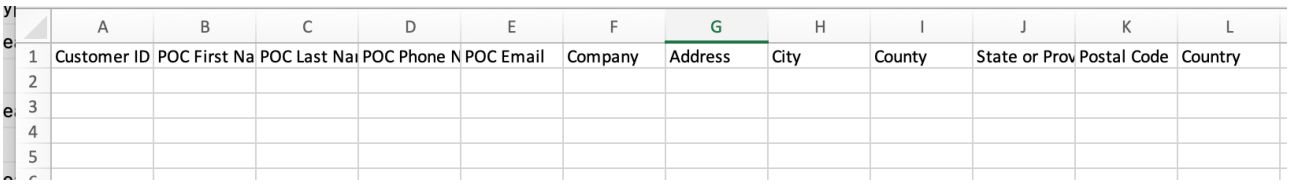
There are two situations when adding records to datasets make sense. The first is when you're not in control of the system of record that your dataset is built from, but you want to supplement it with additional records.

For example, let's say your Employees dataset is built from a data connection to your HR software. The HR software doesn't track unpaid summer interns, but you want to include the intern data with the other employees on your Spider Impact dashboards and reports. In this situation you could create a form to manage the summer interns. It would add additional records to the employees dataset to supplement all of the records that are from the HR system. These new supplementary records would stay around, even after new HR data is imported.

The more common use case for adding records to datasets is when there isn't a system of record and you're starting with a blank dataset. For example, maybe you want to send out a survey to customers, or you want to start tracking your company's computer hardware. In these situations you can create a dataset with no Data Source and manually create fields.



Another option is to choose a Spreadsheet as the Data Source and just not include any records in the spreadsheet.

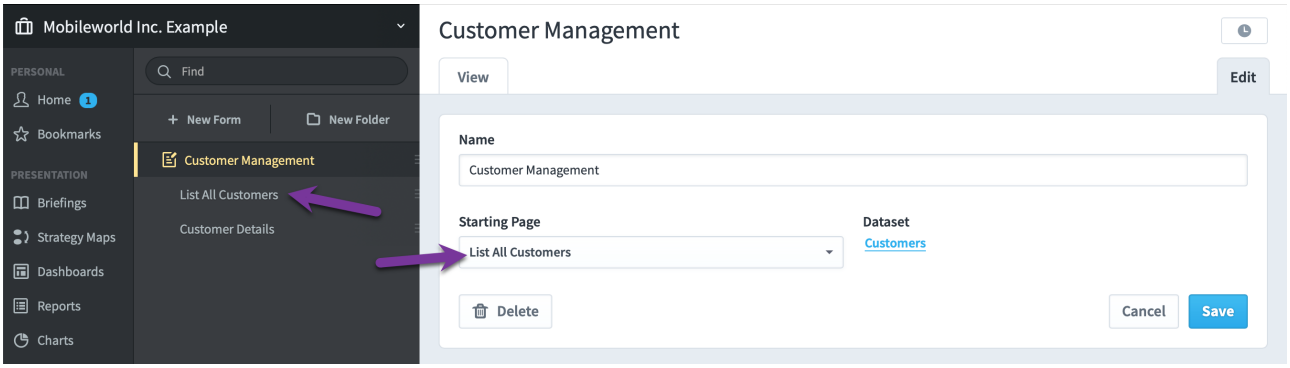


	A	B	C	D	E	F	G	H	I	J	K	L
1	Customer ID	POC First Na	POC Last Nai	POC Phone N	POC Email	Company	Address	City	County	State or Prov	Postal Code	Country
2												
3												
4												
5												

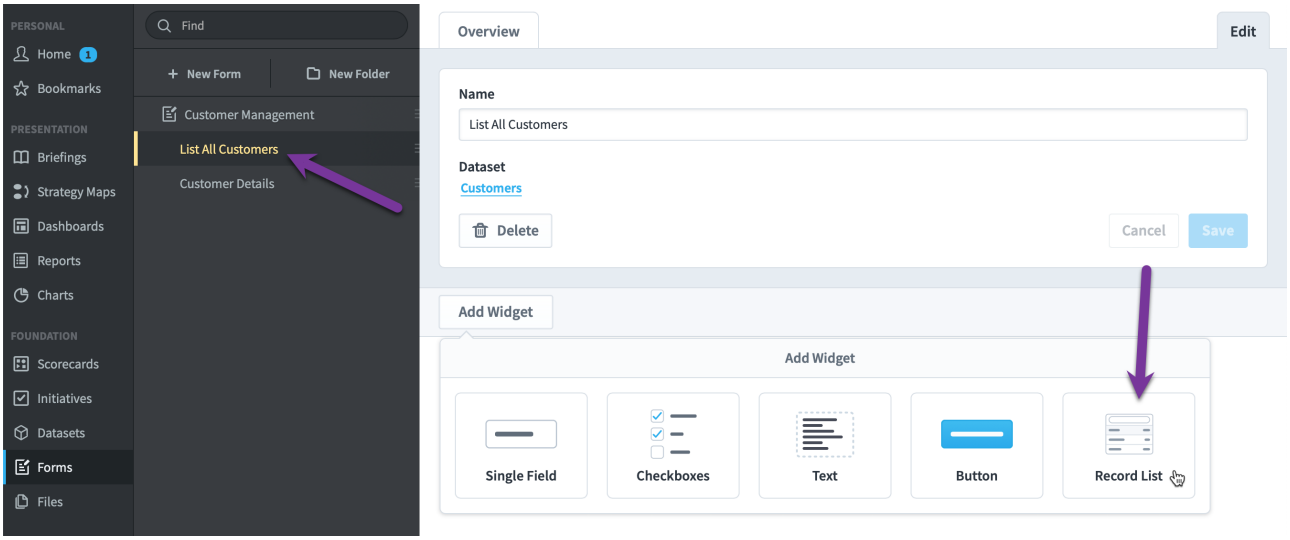
Forms that edit records

Example form

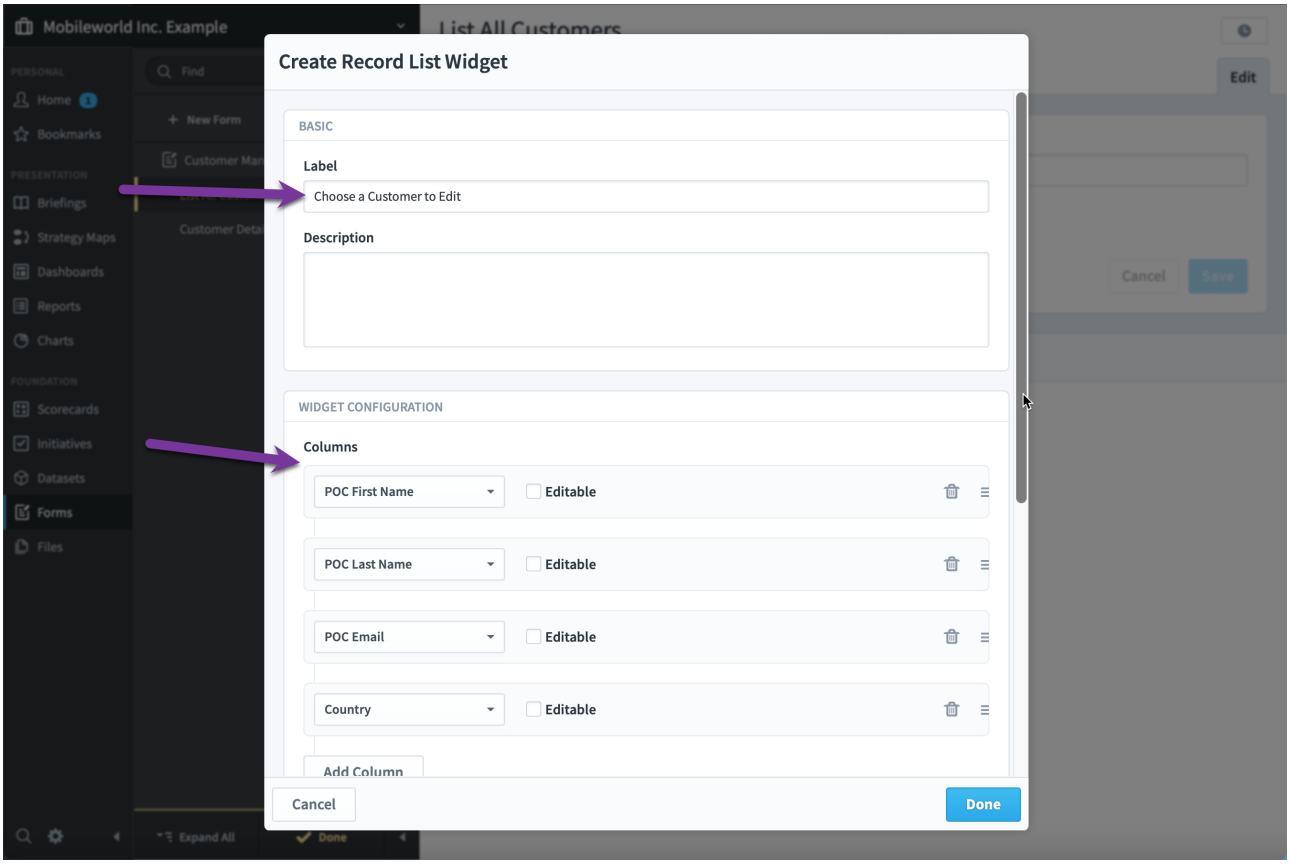
We'll add a second page to our form called "List All Customers" and set it as the form's Starting Page.



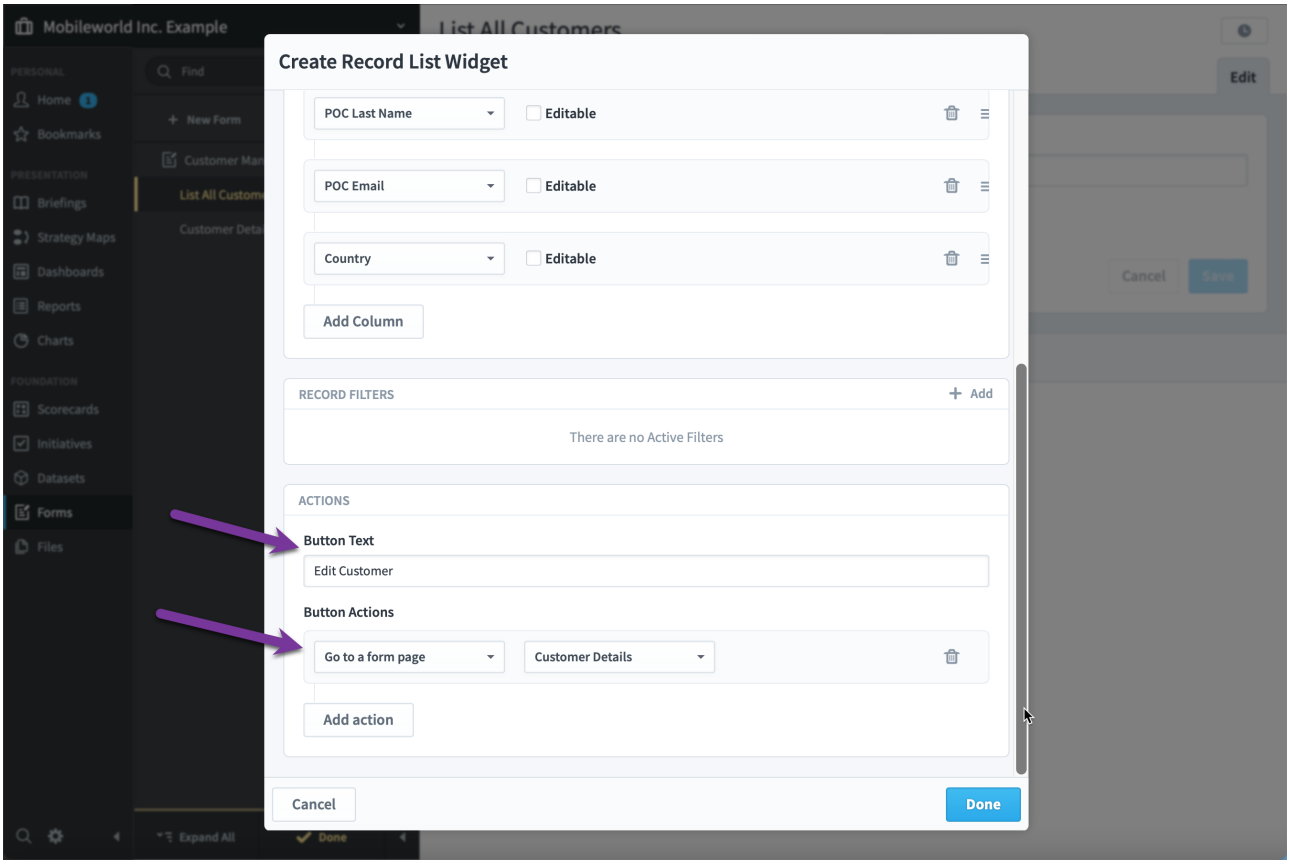
On this new blank page we'll add a Record List widget.



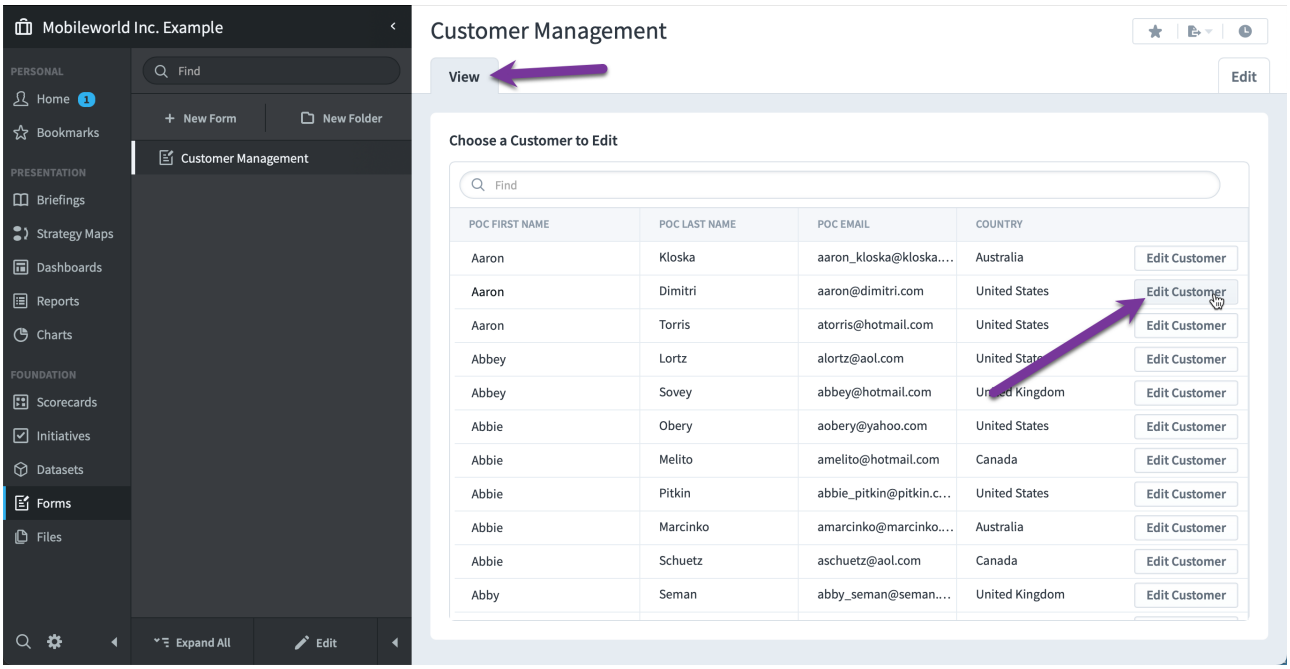
Our Record List widget will have a title of "Choose a Customer to Edit", and we're going to choose to show the customer fields of first name, last name, email, and country to identify each record.



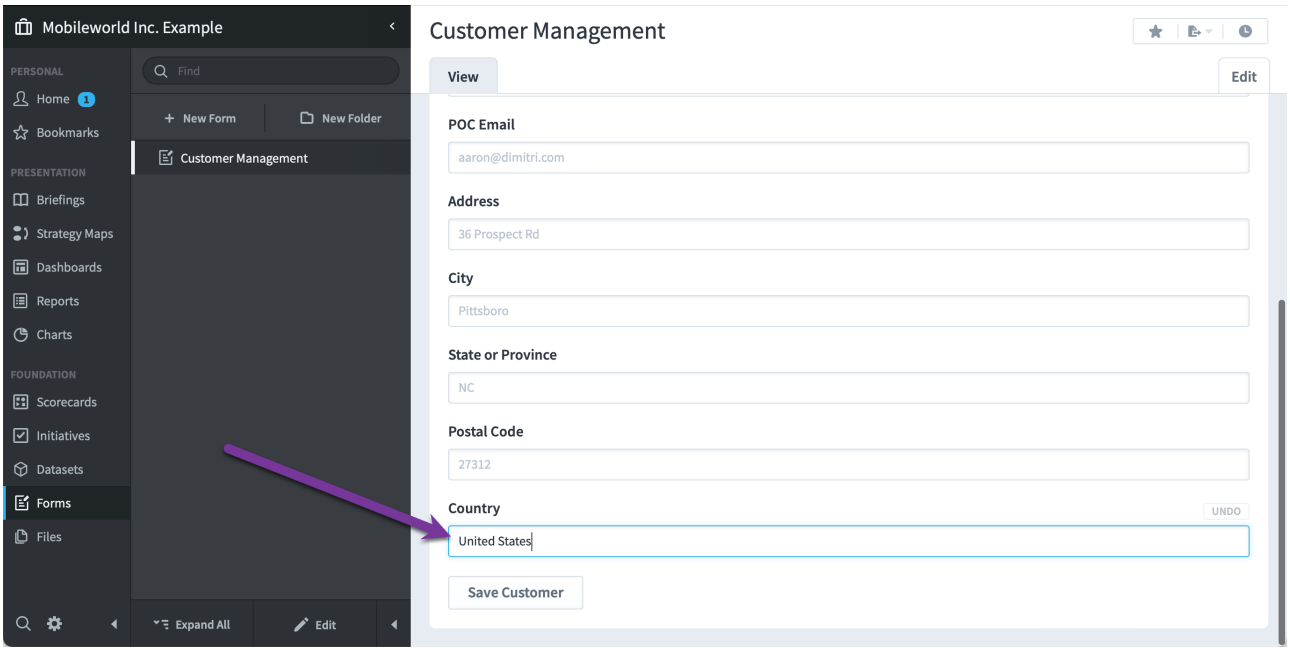
We're also going to have an action button in our Record List widget. Each record will have an "Edit Customer" button that goes to the "Customer Details" page for that record when clicked.



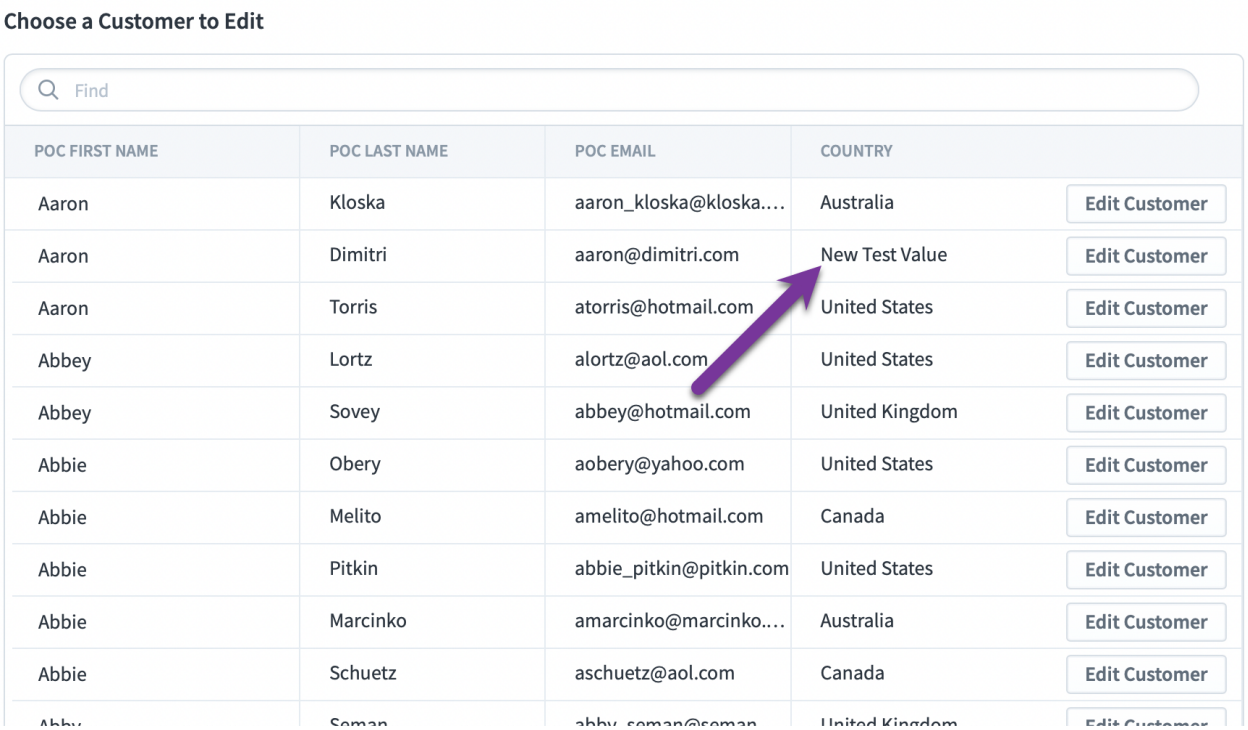
Now when I go to the View tab to use the form, it lists all of the records in the Customer dataset.



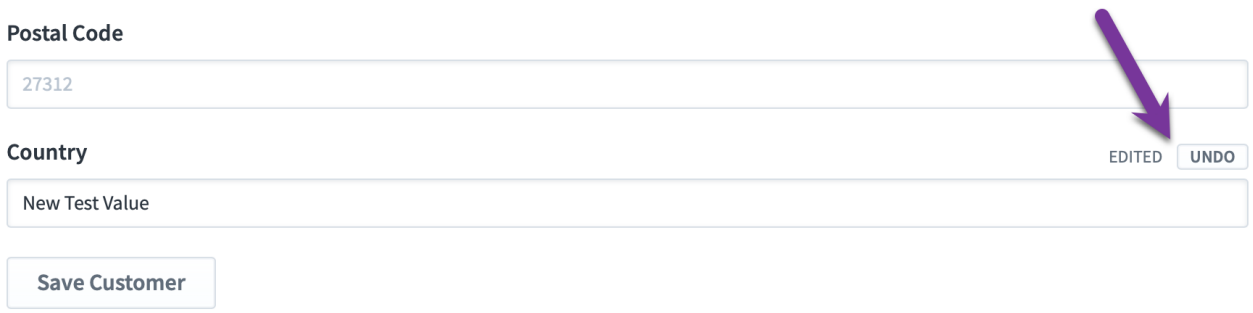
When I click the "Edit Customer" button for one of the records, it goes to the Customer Details page for that record.



The Country field is editable, so we'll change that to "New Test Value" and click Save Customer. The form goes back to the customer list and we can see this new country value.

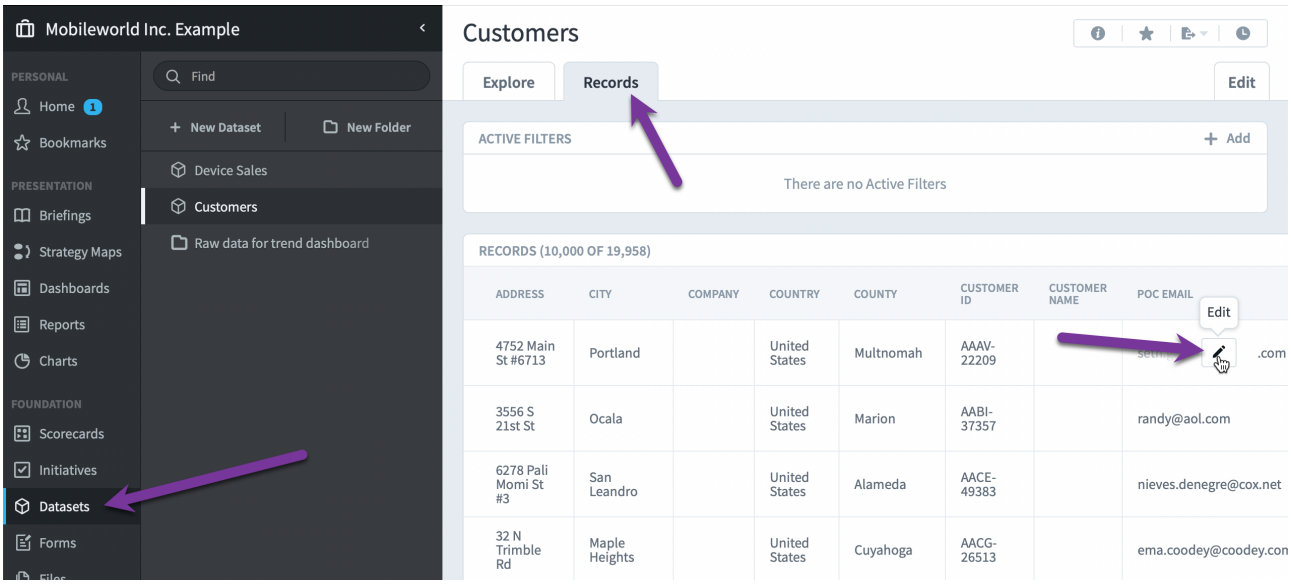


When we click the Edit Customer button for this record, we can now see that its imported value is being overridden. We can type a different value, or we can click "Undo" to go back to the imported value.

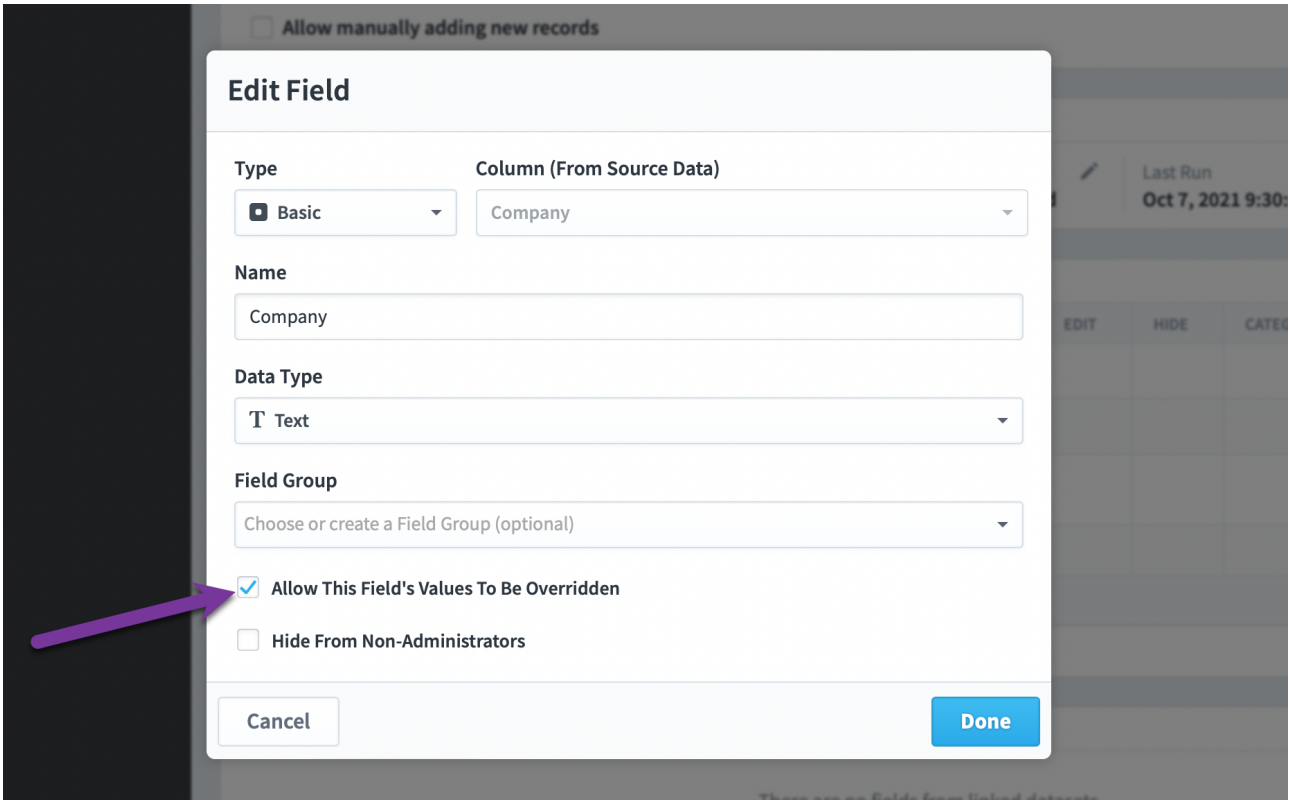


Similarities with Datasets Records tab

If you're editing a record that came from a data import rather than being manually added, this new value that you entered will stay in the dataset, even after you import new data with "replace all records" later. This is the exact same behavior as editing a record on the Datasets Records tab.



All of the user permissions that apply to editing records on the Datasets Records tab also apply to forms. That means you can only override imported values in a form if that dataset field has "Allow This Field's Values To Be Overridden" checked on the dataset's Edit tab. See the Manually Adding & Updating Records article for more information.



Reasons for editing imported records

There are two reasons for editing fields in records that are imported from a system of record. The first is when you're not in control of the system of record that your dataset is built from, but you want to correct its data.

For example, let's say your Employees dataset is built from a data connection to your HR software. If you notice that a few of the employees' departments are either incorrect or missing, the best approach is to fix the data in the system of record, and then the corrected values will show up in Spider Impact. If that isn't possible for some reason, however, you can override the values in Impact and they'll stay overridden even after the next import.

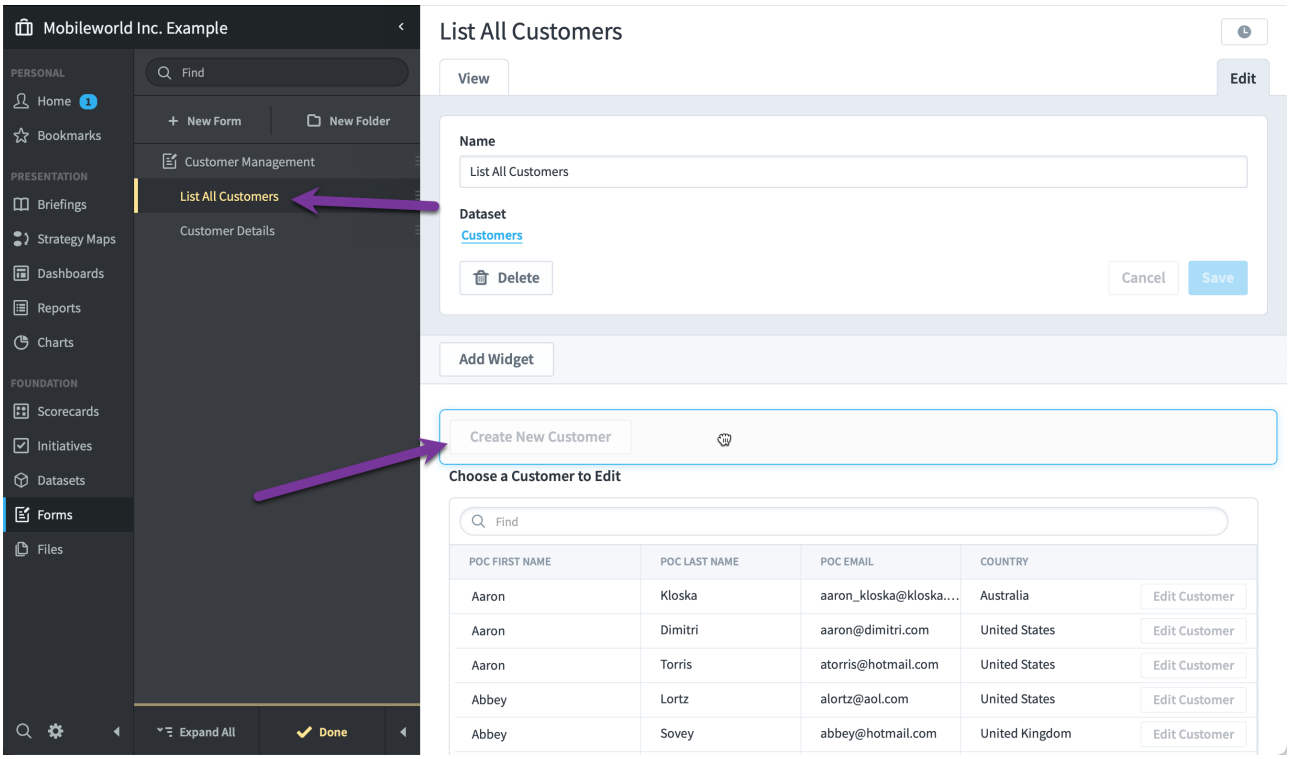
The more common use case for editing an imported record, however, is adding supplementary fields that don't exist in the system of record. For example, let's say you want to track each employee's t-shirt size, and that's not something your HR

software does. You can just add a T-Shirt Size field to the Employees dataset and then enter those values using an Employees dataset form.

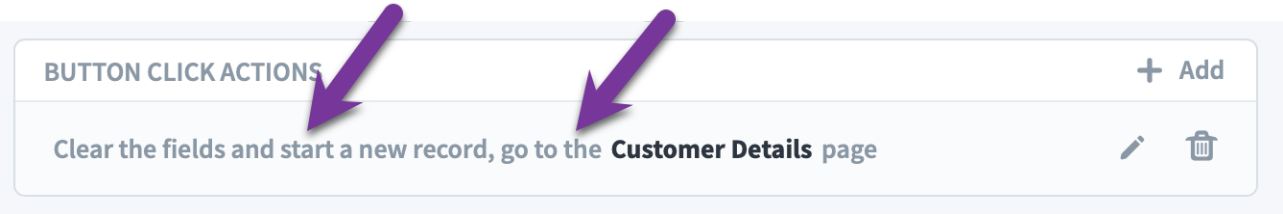
Forms that create and edit records

Example form

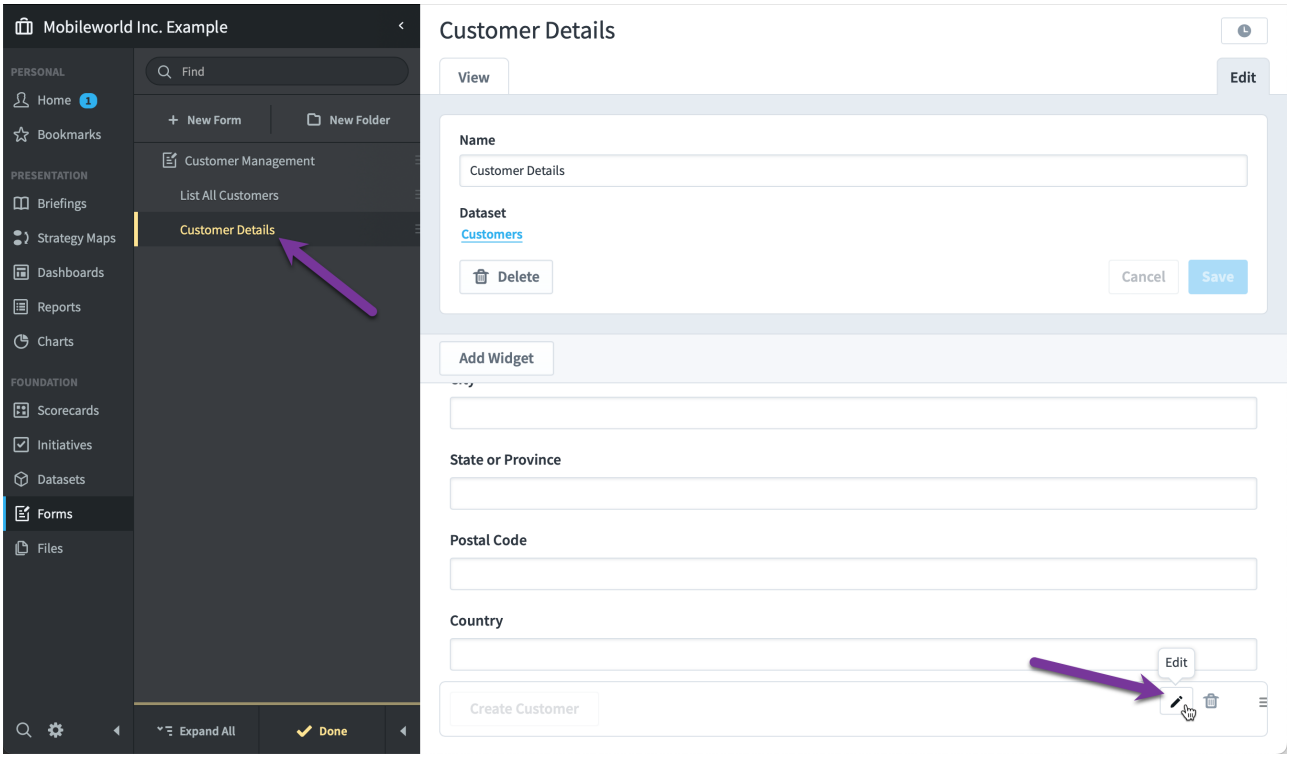
We've given examples above of forms that add records and forms that edit records, but forms can also do both. Here we're adding a "Create New Customer" button to the form's starting page.



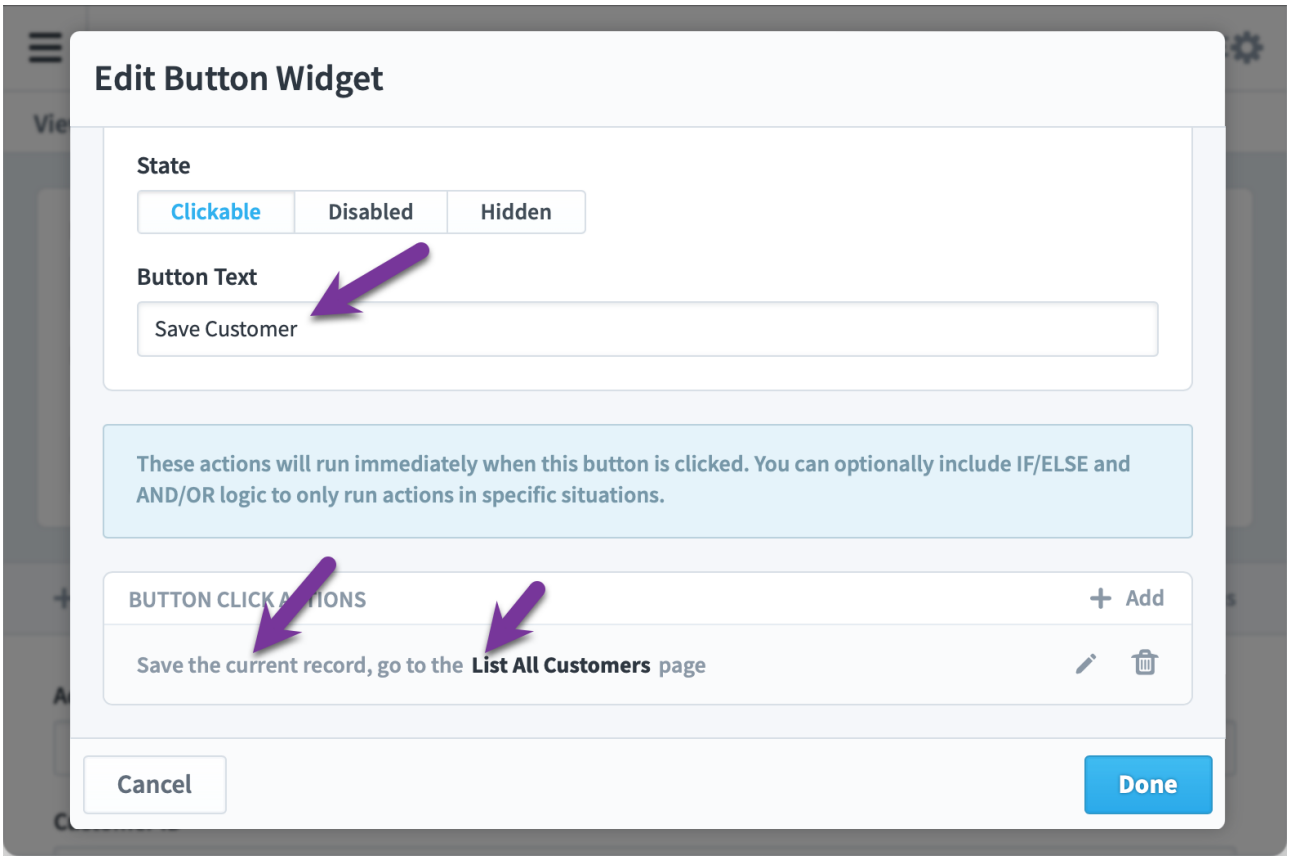
This new button does two things when clicked. First it clears fields and starts a new record. Second, it goes to the customer details page.



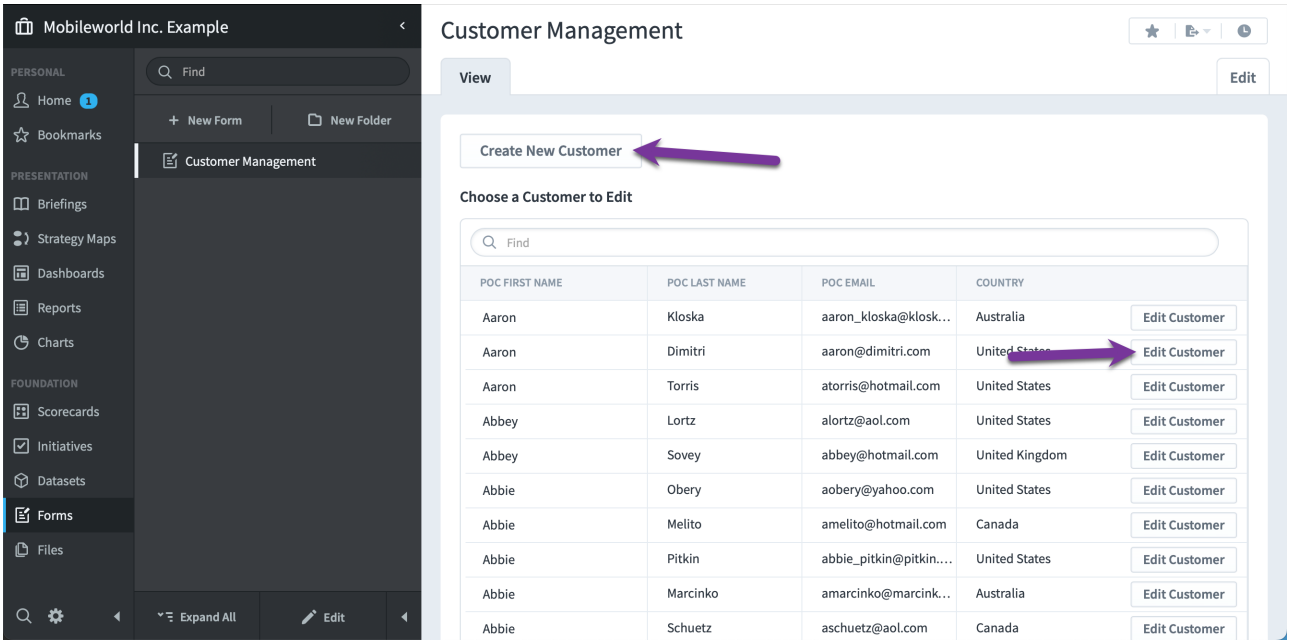
We'll also edit the button that's on the Customer Details page.



It's now going to go back to the "List All Customers" page after saving the record. We'll also change the button's name to simply "Save Customer" because this page is going to be used to both create and edit customer records.



Now when we go to the View tab, we can choose between two different types of actions. We can click on the "Create New Customer" button, which takes us to the "Customer Details" page to create a new record. Or, we can click on a record's "Edit Customer" button. This also takes us to the "Customer Details" page, but we'll be editing the existing record.



Regardless of whether you're adding or editing a record, the form will go back to the "List All Customers" starting page when we click the "Save Customer" button.

Page display actions

You can choose to run actions whenever a page is first displayed. See the Form Actions, Variables, and Logic article for more information.

Reports

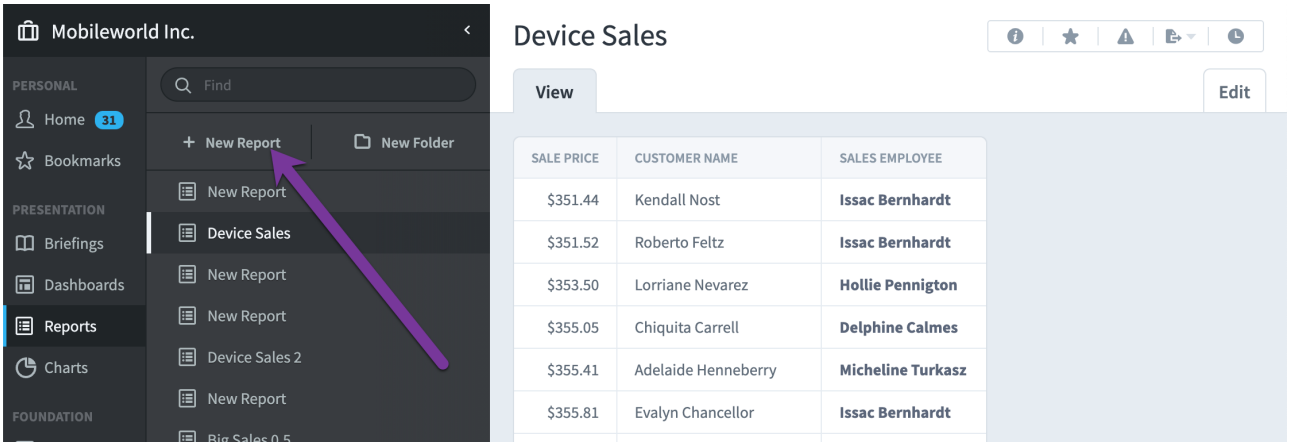
Overview of Reports

The Basics

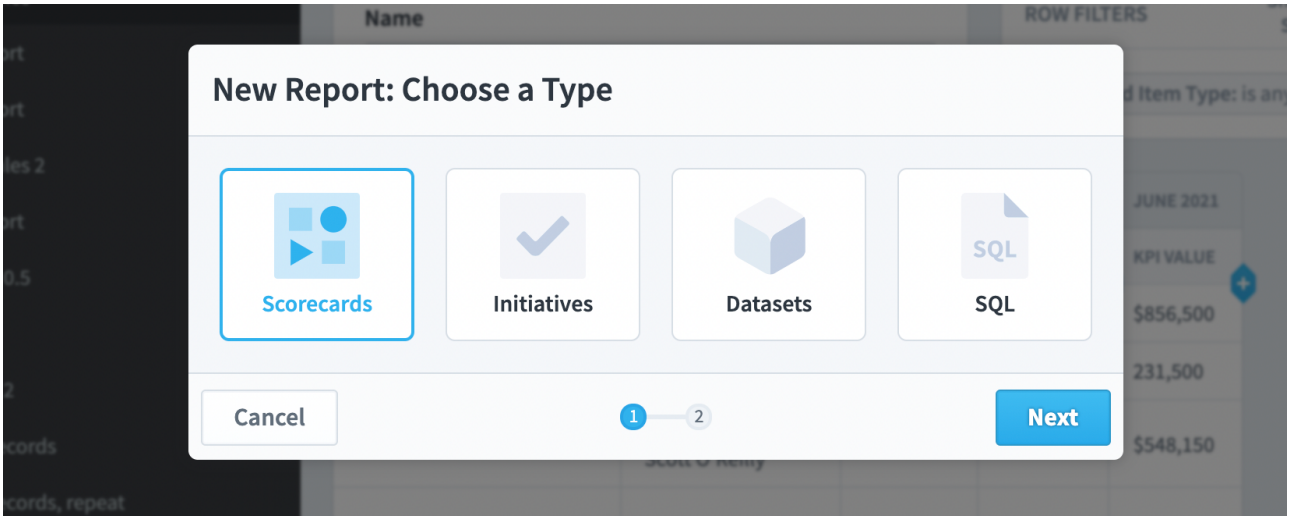
Reports show information about many Scorecard items, Initiative items, or Dataset records at once. They have formatting, grouping, sorting, filtering, and aggregating. In short, Spider Impact now has a full-featured report designer for all of the data it tracks. For example, you can choose to view all of the downward trending KPIs, all of the initiatives owned by a particular person, or aggregated data about every Canadian employee.

Creating a report

To create a new report, click the “New Report” button in the Reports section.

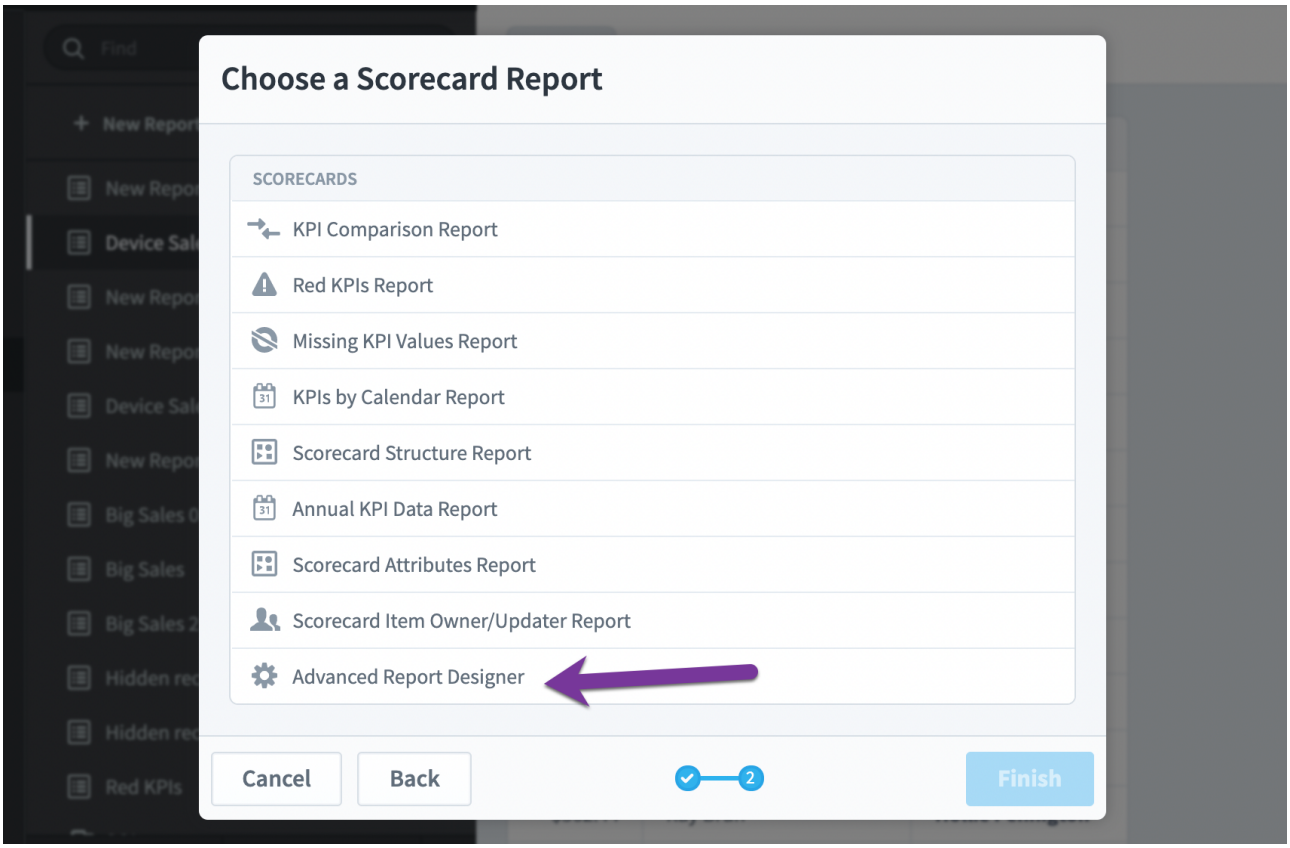


Each report is for a single type of data. First, we’ll choose Scorecards.

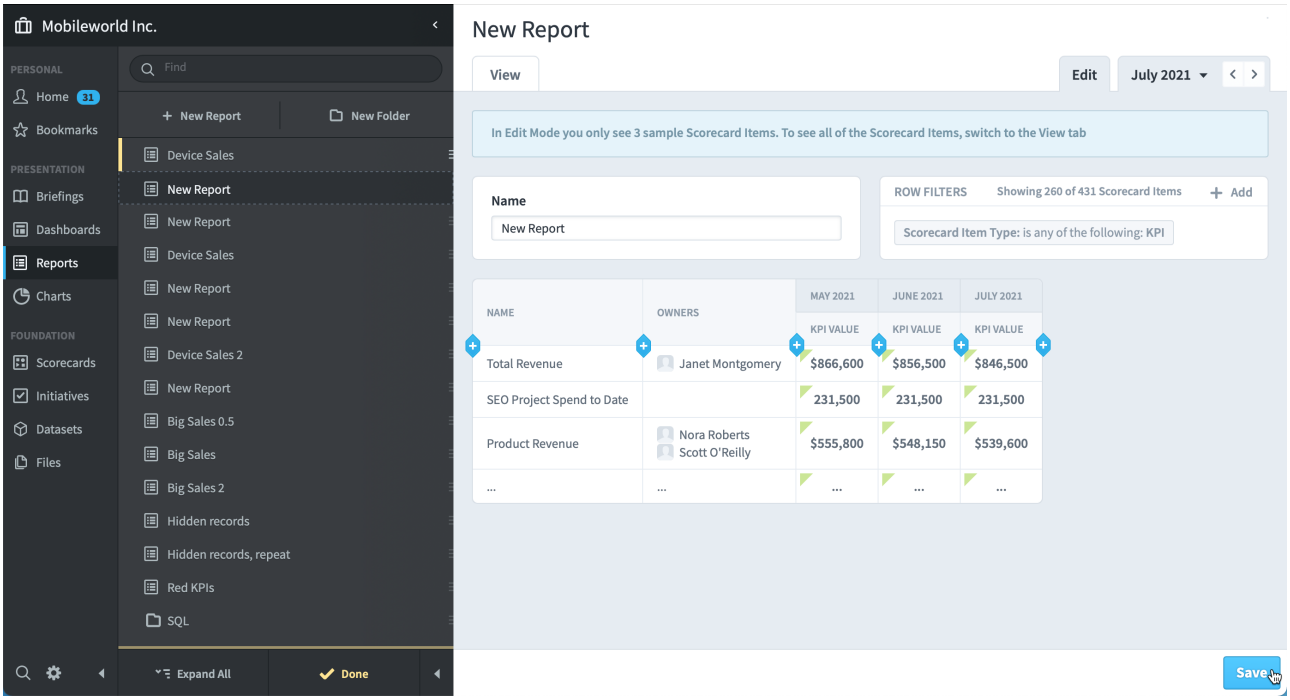


You can choose between several pre-built reports like the Red KPIs report and Missing KPI Values report. These reports get you started with "canned" reports that you can configure. See the Prebuilt Scorecard Reports article for more information.

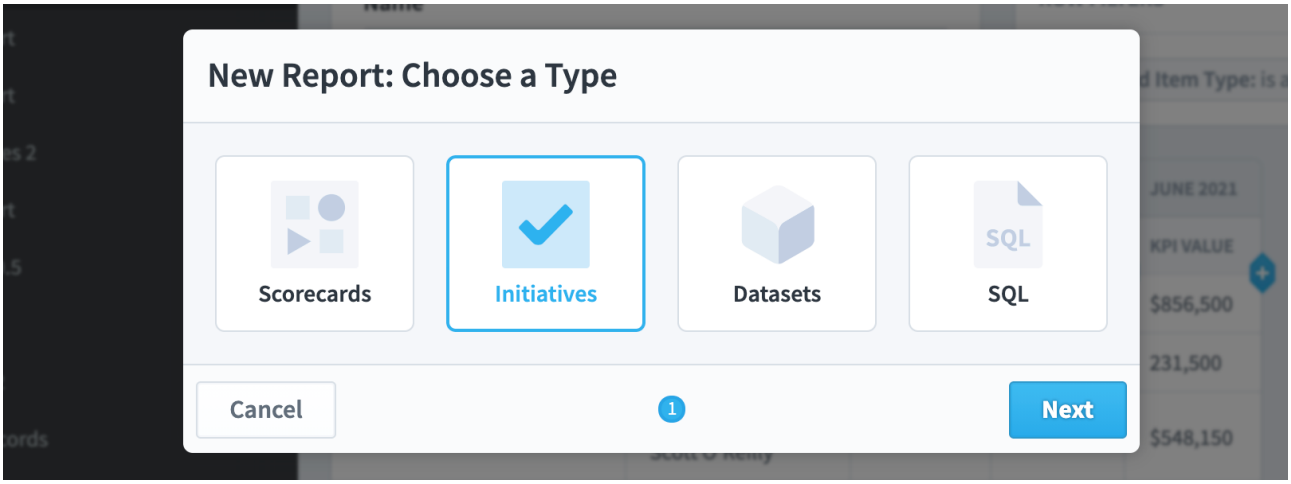
Instead, we'll build a report from scratch by choosing the Advanced Report Designer option on the bottom.



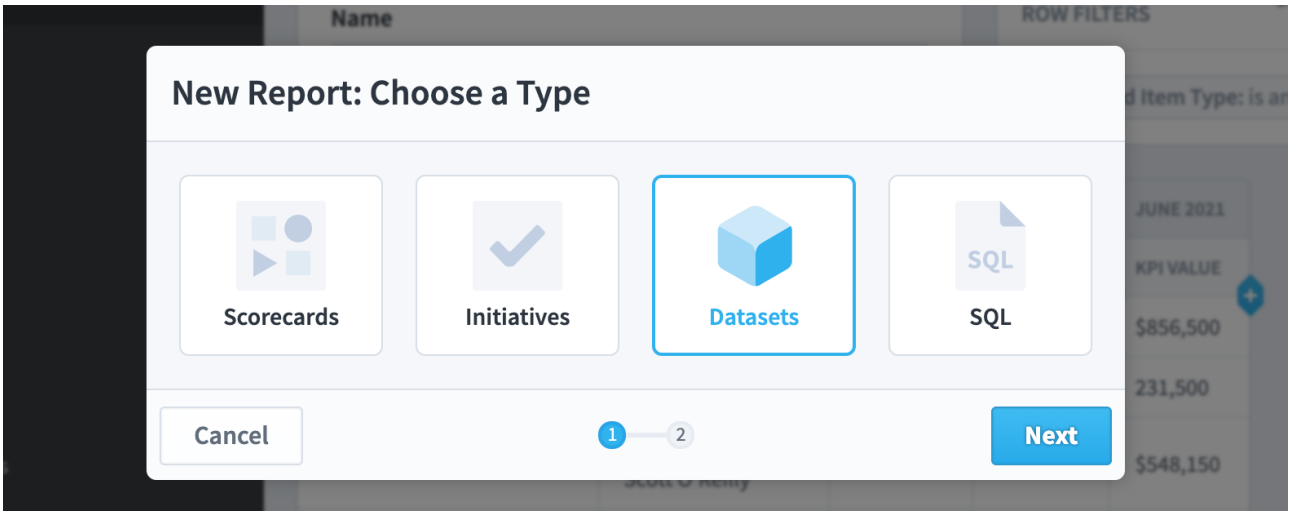
The Advanced Report Designer for scorecard items starts by showing the scorecard item name, owners, and three periods of data for all KPIs.



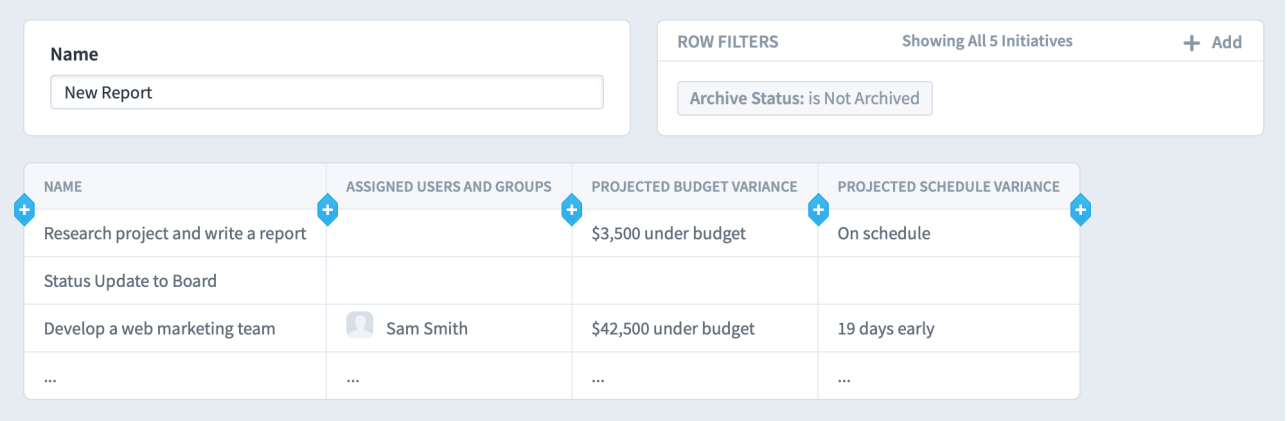
Let's start a new report, and this time we'll choose Initiatives.



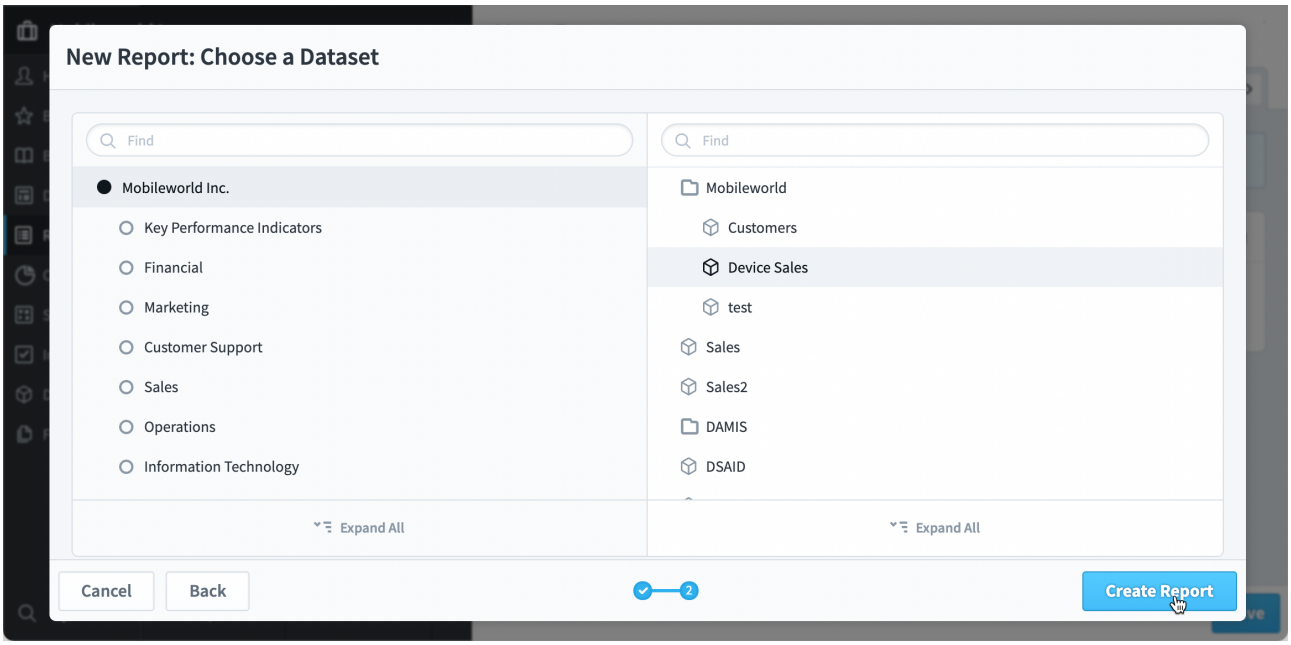
A new Initiatives report starts with showing the budget and schedule information for all non-archived initiative items.



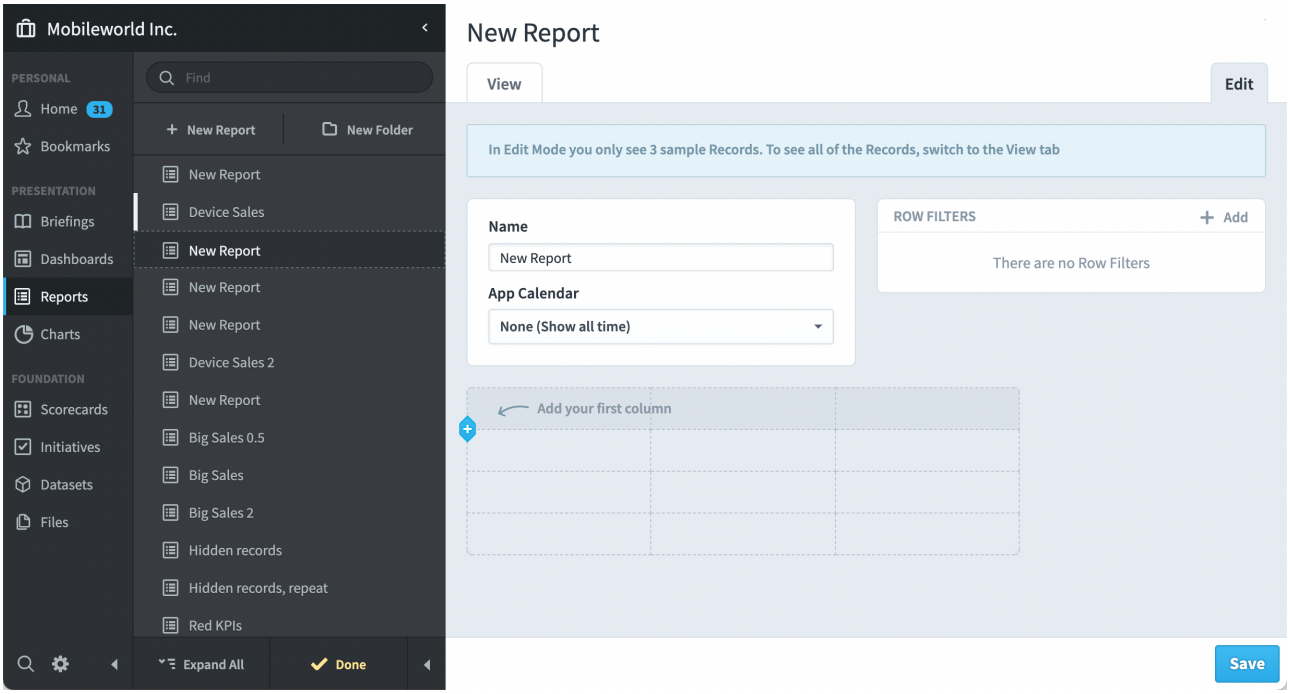
The third type of report is Datasets.



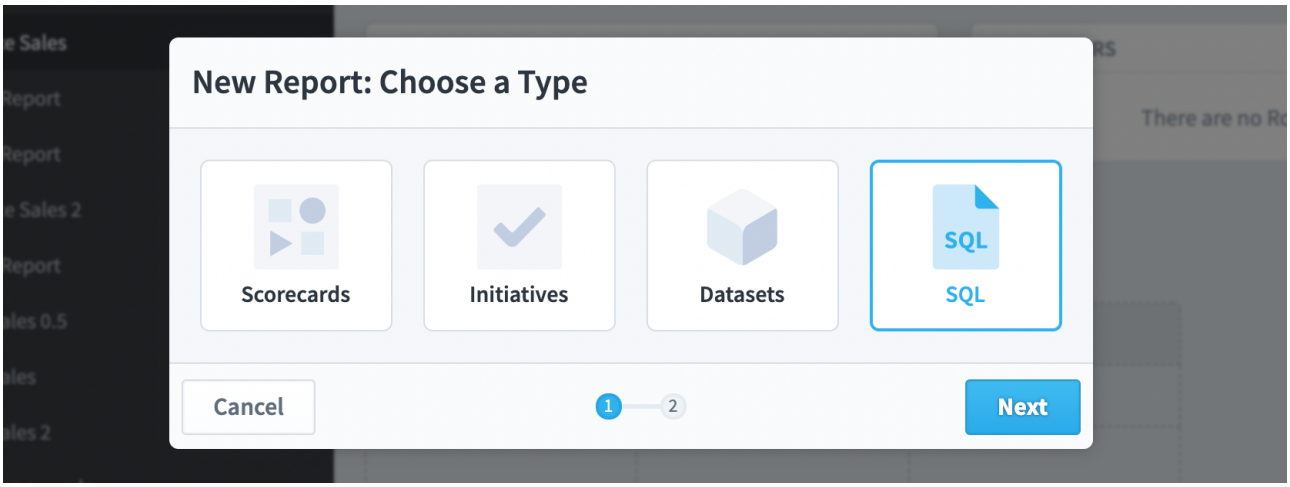
A dataset report shows data from a single dataset, which we'll choose next.



Dataset reports are a little different from Scorecard and Initiative reports because every dataset field is unique to each dataset. Because of this, dataset reports start blank.



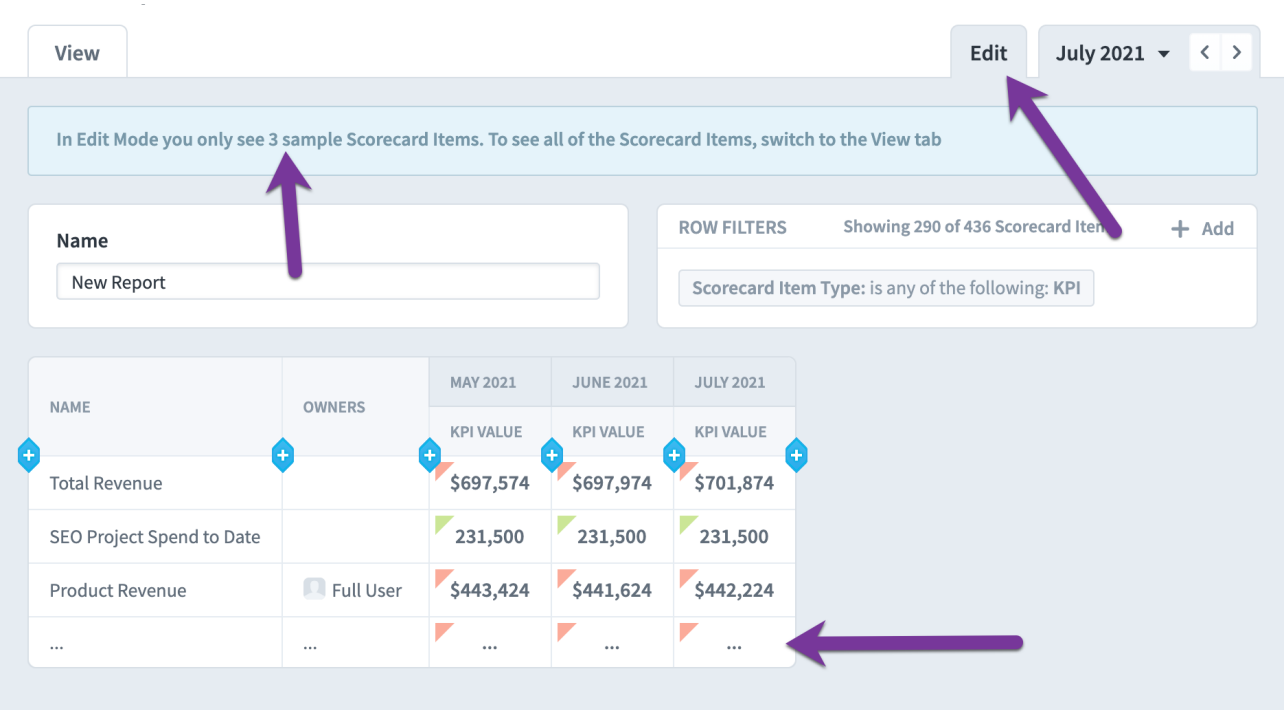
Finally, users with the right permissions can choose SQL reports.



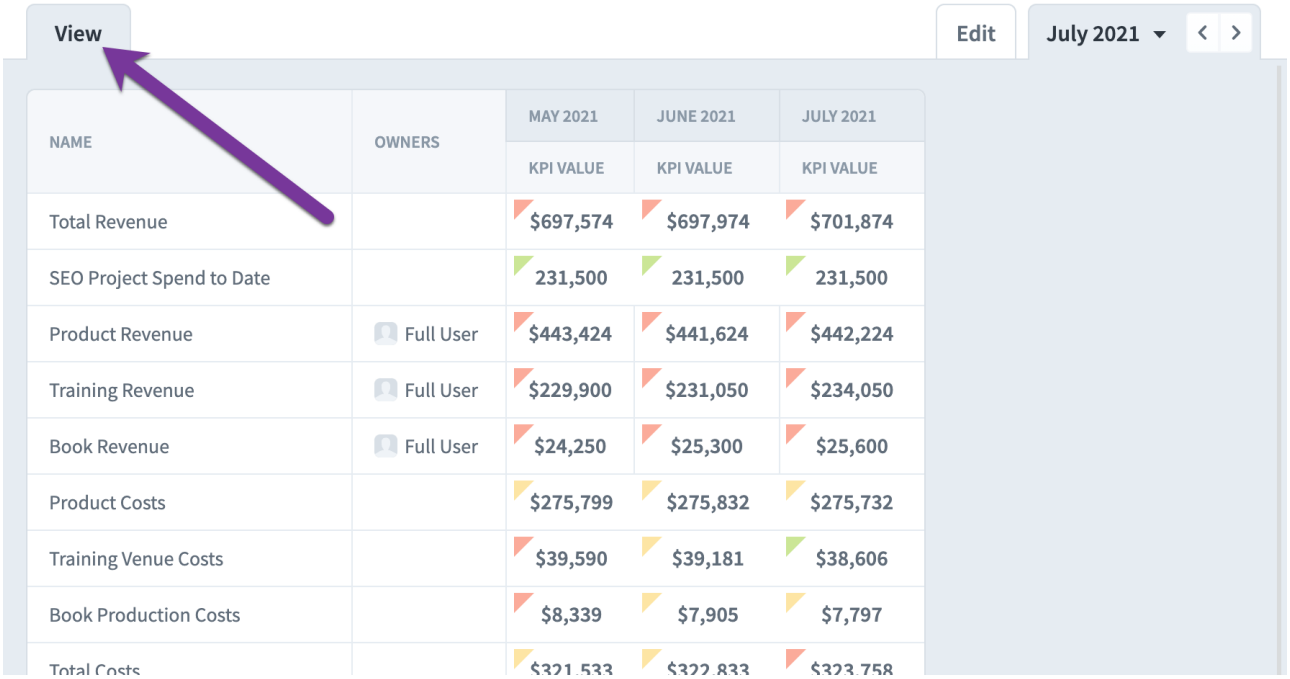
This allows them to write SQL queries against a database that you have set up in Admin > Import Connections. For more information, see the SQL Reports article.

The View and Edit tabs

Regardless of whether you're writing reports for Scorecards, Initiatives, or Datasets, the general flow is the same. The Reports Edit tab always shows the first three records so you can get a preview of what your report will look like.



When you switch to the View tab, you'll see your entire report.



Column Sorting

When you're viewing a report, you can temporarily change the sorting by clicking on the column headers. See the Building Reports article for information about setting the default sorting.

Impact Intelligence

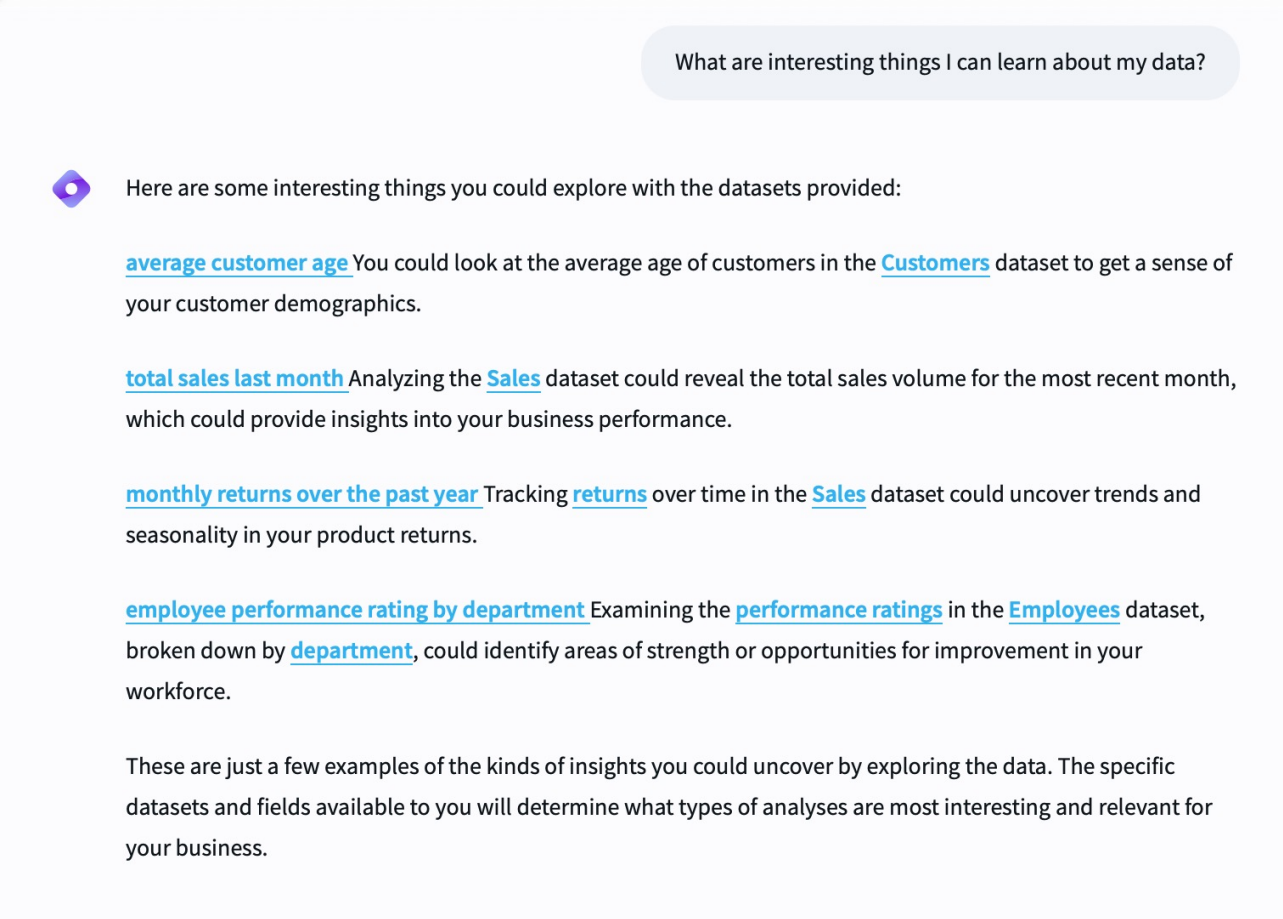
Overview of Impact Intelligence

Impact Intelligence is Spider Impact's comprehensive suite of smart capabilities that help you discover insights you didn't know existed and work more efficiently with your data. It combines powerful analytics, proactive monitoring, and AI-powered assistance to transform raw data into actionable intelligence. Impact Intelligence is the smart layer across Spider Impact that helps you understand what's happening, predict what's coming, and get answers instantly.

Most importantly, Impact Intelligence is secure and keeps your sensitive data private. See the Impact Intelligence Security and Privacy article for more information.

Impact Assistant

Impact Assistant is the AI-powered conversational interface at the heart of Impact Intelligence. It enables natural language conversations with your data and provides instant help with using the software. Simply ask questions like "What was our revenue last quarter?" or "How do I create a dashboard?" and get immediate answers with visualizations or step-by-step guidance.



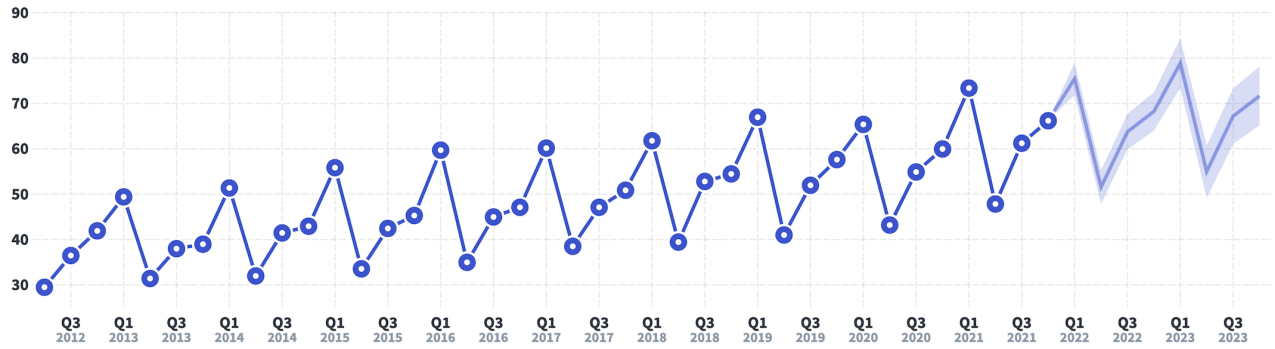
See our Impact Assistant article for more information.

Predictive Analytics

Forecasting

Spider Impact uses time-series analysis to predict future values based on historical data. The software automatically detects patterns and selects the best forecasting model:

- Automatically detects seasonal trends
- Uses exponential smoothing algorithms (Simple, Holt's, and Holt-Winters)
- Shows 90-99% confidence intervals
- Allows manual model selection and seasonality adjustments

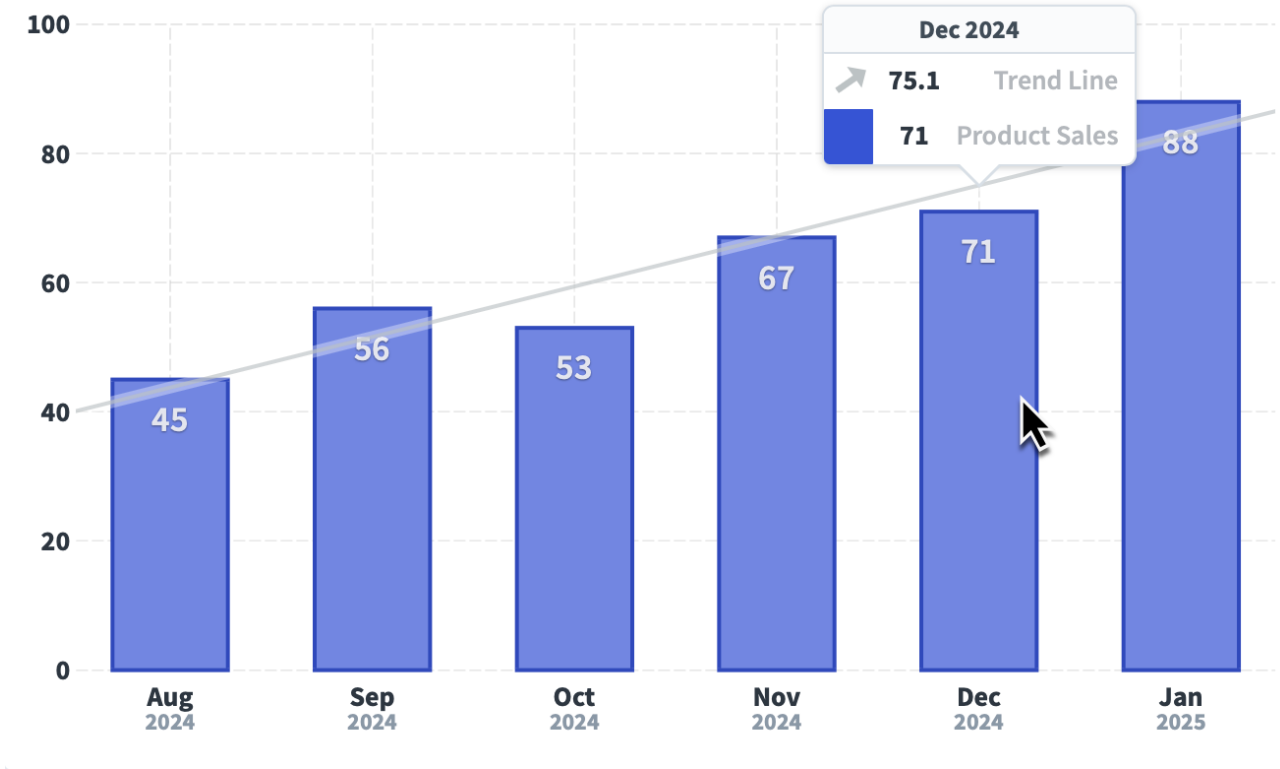


For more information about forecasting, see the Forecasting section of the Building Charts article.

Trend Analysis

You can add trend lines to any chart to see underlying patterns:

- Calculate trends across single or multiple data series
- Customize trend line appearance and data sources
- Add above/below fills to highlight deviations



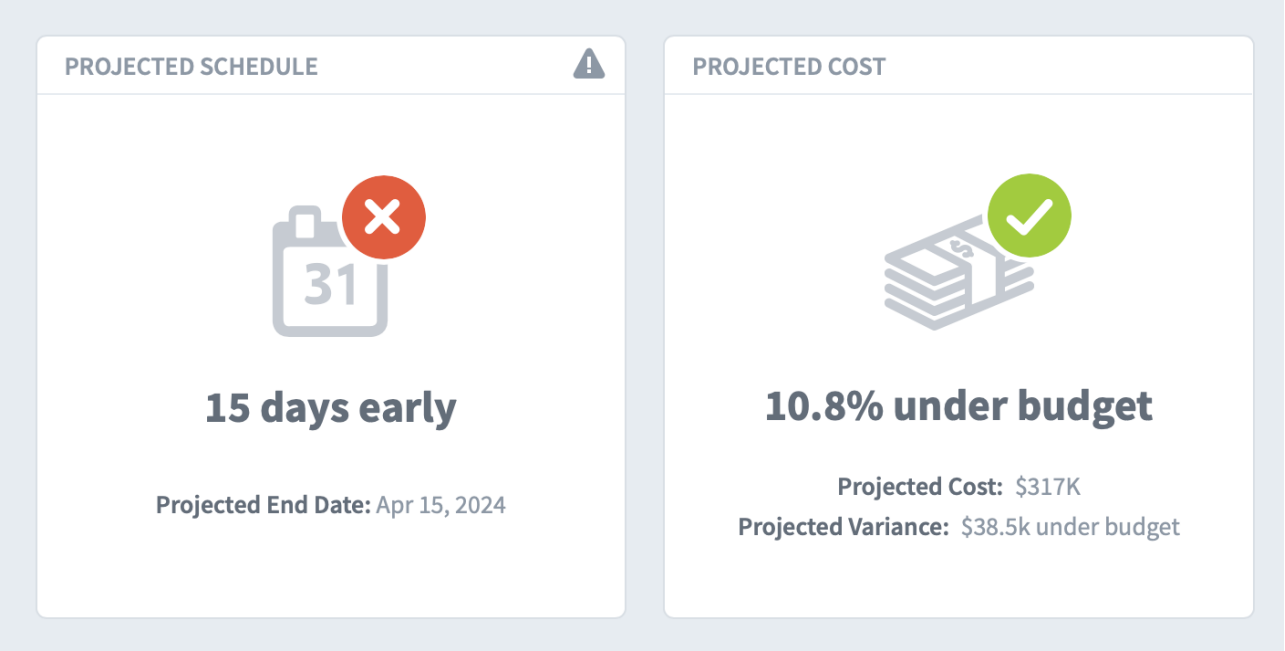
Trend lines are covered in detail in the Trend Lines section of the Building Charts article.

Performance Analytics

Earned Value Management (EVM)

EVM calculations are built into the Initiatives Overview tab to automatically predict initiative completion date and costs based on current performance:

- Tracks both schedule and cost performance
- Automatically calculates key EVM metrics
- Projects completion dates and final costs
- Only requires updates to percent complete and actual costs

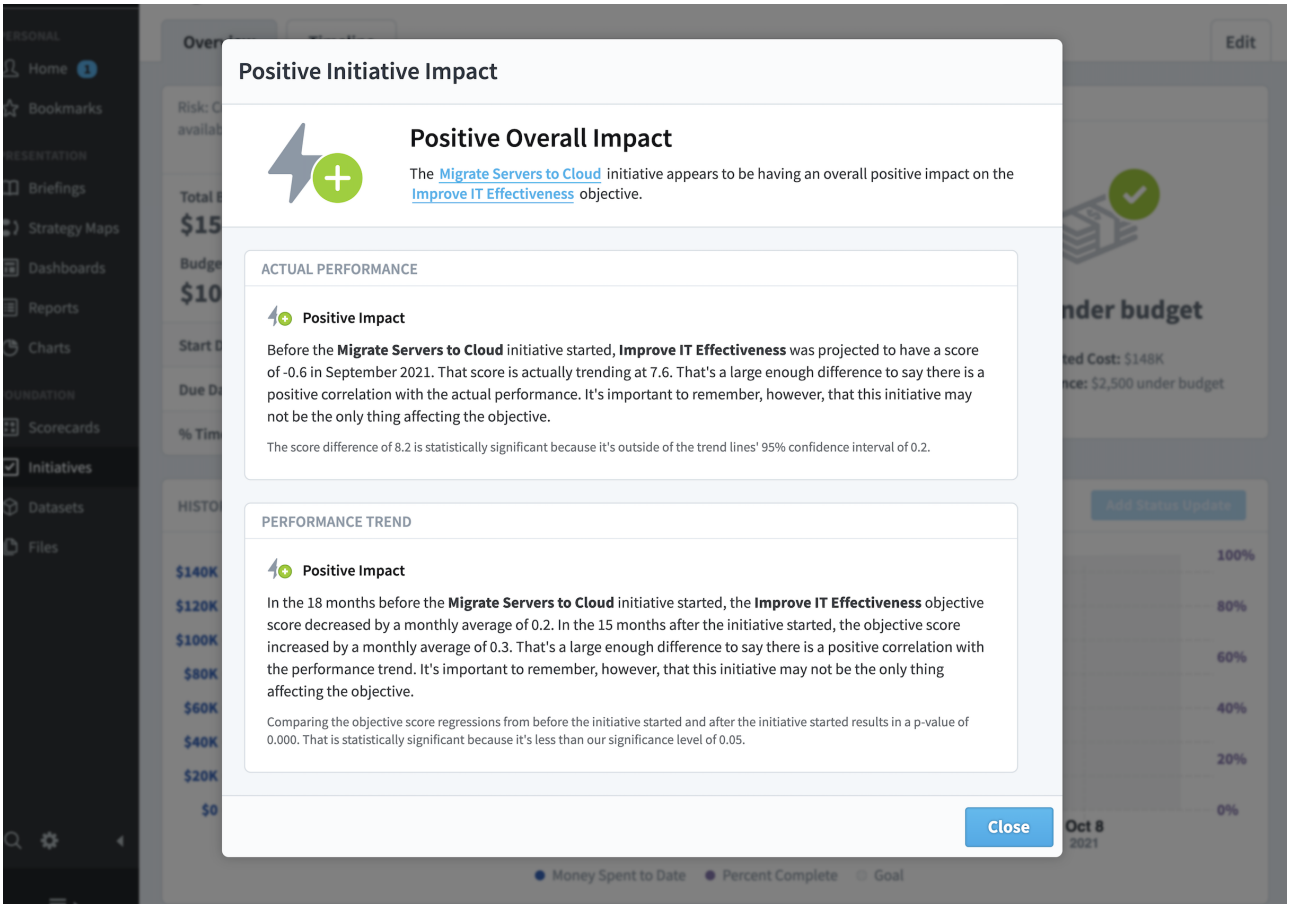


For more information about EVM, see the What is Earned Value Management? article on our website.

Initiative Impact Analysis

Spider Impact can determine how initiatives affect your metrics by:

- Analyzing pre- and post-initiative performance
- Detecting statistically significant changes
- Identifying positive, negative, or mixed impacts
- Using both trend and absolute performance changes

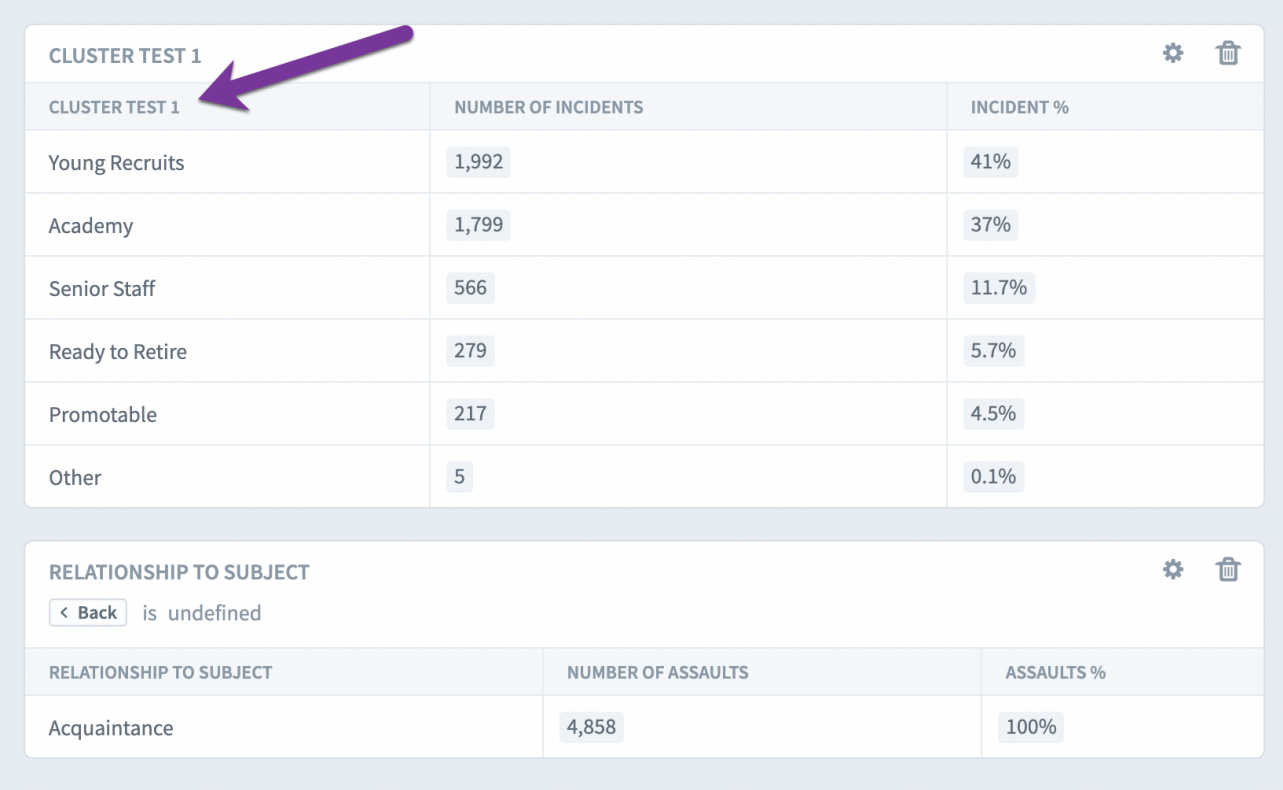


Initiative impact is covered in detail in the Determining Initiative Impact article.

Clustering

For discovering patterns in large datasets, Spider Impact's clustering analytics can:

- Find natural groupings in your data
- Work with multiple dimensions simultaneously
- Use sophisticated k-means++ algorithms
- Help identify meaningful segments and profiles



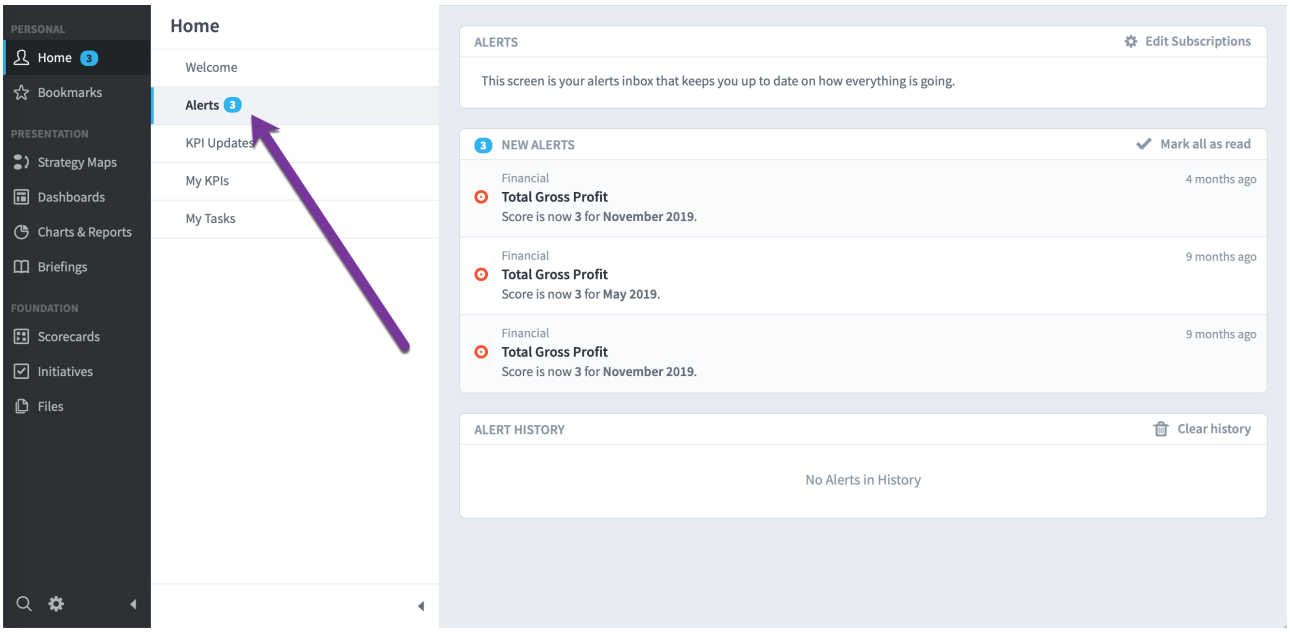
Learn more about clustering in the Advanced: Clustering Analytics article.

Proactive Intelligence

Smart Alerts

Spider Impact continuously monitors your data and automatically notifies relevant stakeholders of important changes and updates. The alert system includes:

- Performance alerts when KPIs turn red
- Notification of replies to comments and discussions
- Reminders for KPI data updates
- Alerts for linked item modifications
- Customizable alert preferences and delivery schedules

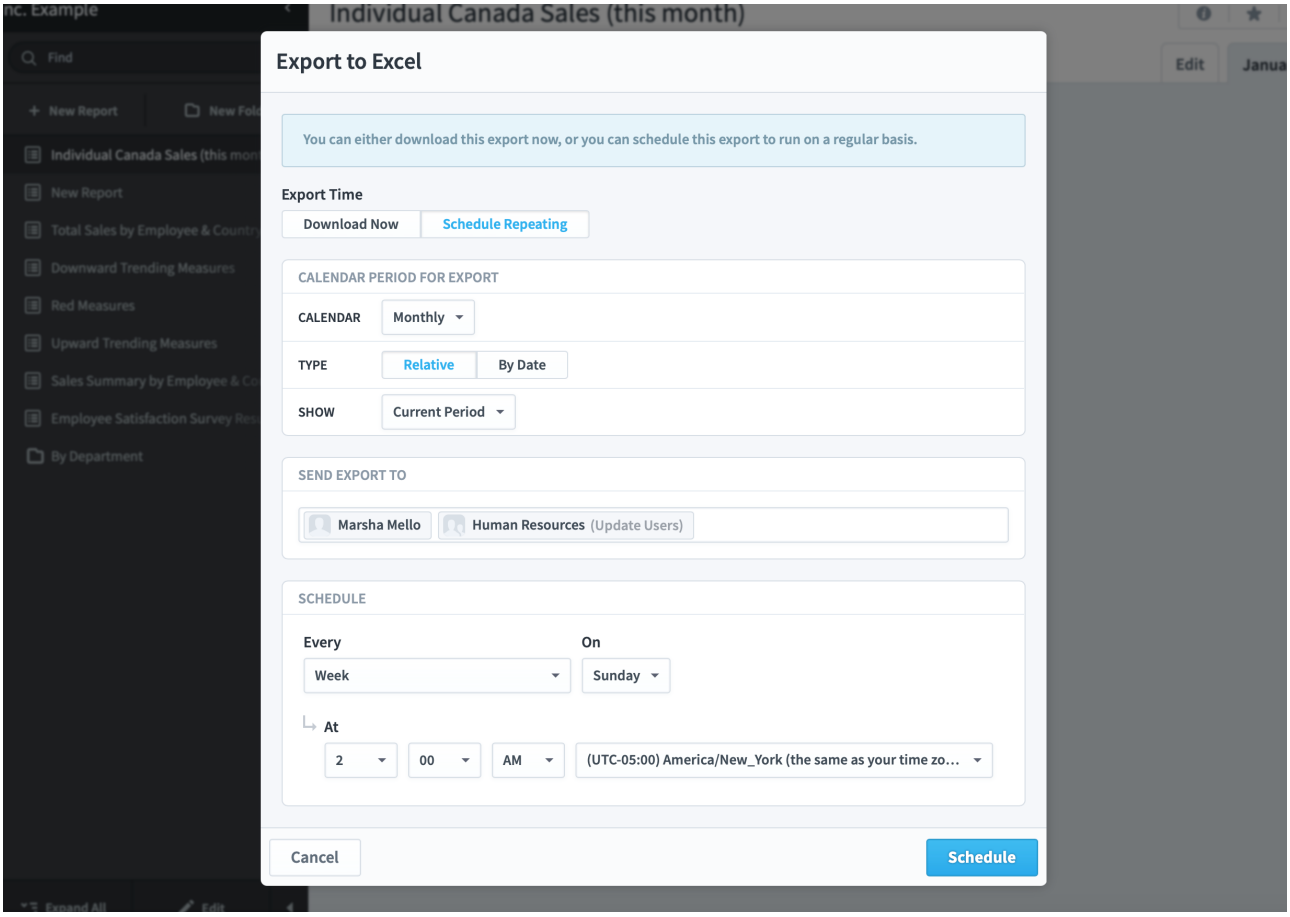


For comprehensive information about alerts, see our Overview of Alerts article.

Automated Reporting

Spider Impact can automatically generate and distribute reports on a schedule, keeping stakeholders informed without manual intervention:

- Schedule reports for regular delivery (daily, weekly, monthly)
- Customize report content and recipients
- Include critical performance indicators:
- Red KPIs and downward trends
- Over-budget or delayed initiatives
- Data quality issues



Learn more about automated reporting in our Overview of Reports article.

When to Use Each Type

- Use **Forecasting** for projecting future metric values based on historical patterns
- Use **Trend Analysis** to understand underlying patterns in your data
- Use **Clustering** to discover natural groupings in large datasets
- Use **Initiative Impact** and **EVM** to track and predict project performance
- Use **Impact Assistant** for instant answers to data questions and software help
- Configure **Alerts** to stay informed of important changes automatically
- Set up **Scheduled Reports** to regularly distribute key performance information

General

No-Code Apps

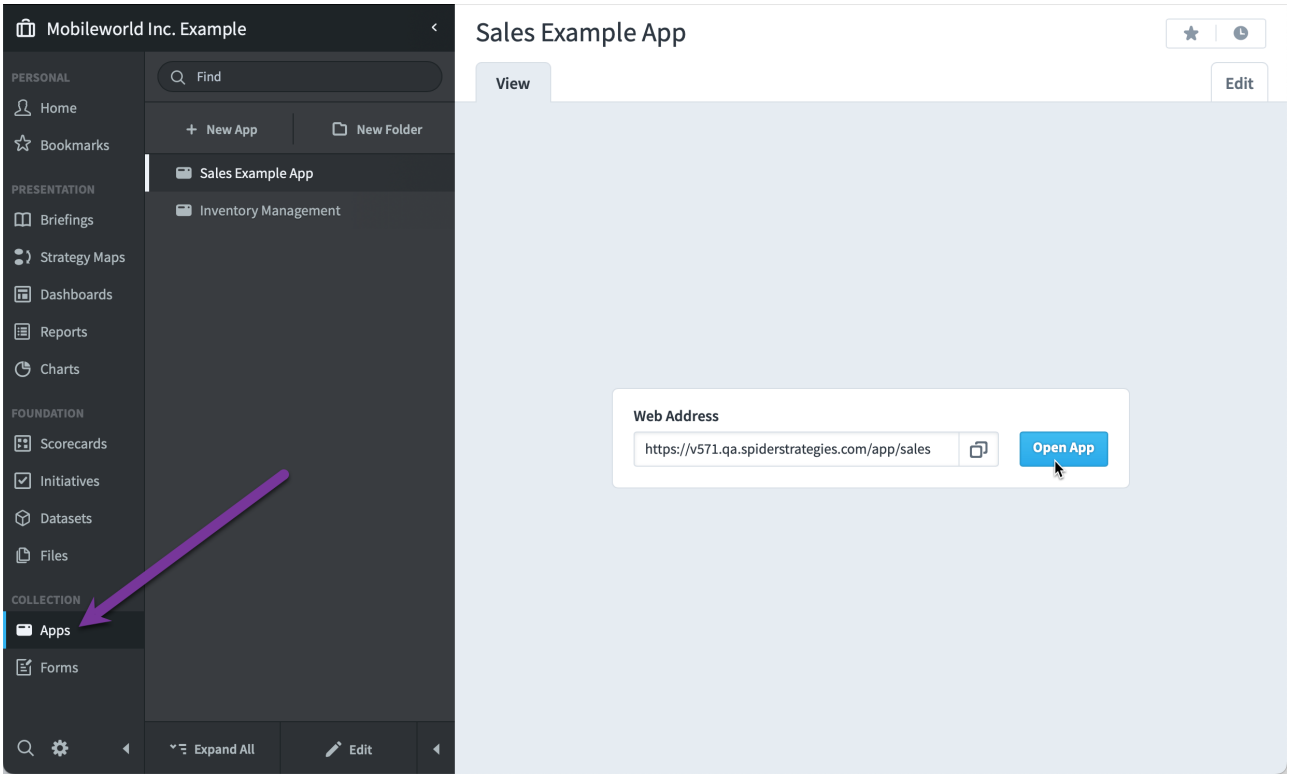
Apps is a powerful feature in Spider Impact that allows administrators to build curated, branded experiences for specific tasks. Apps enable streamlined workflows and customized interfaces by consolidating data collection, reporting, and operational tools into a single, integrated environment.

Key Benefits of Apps:

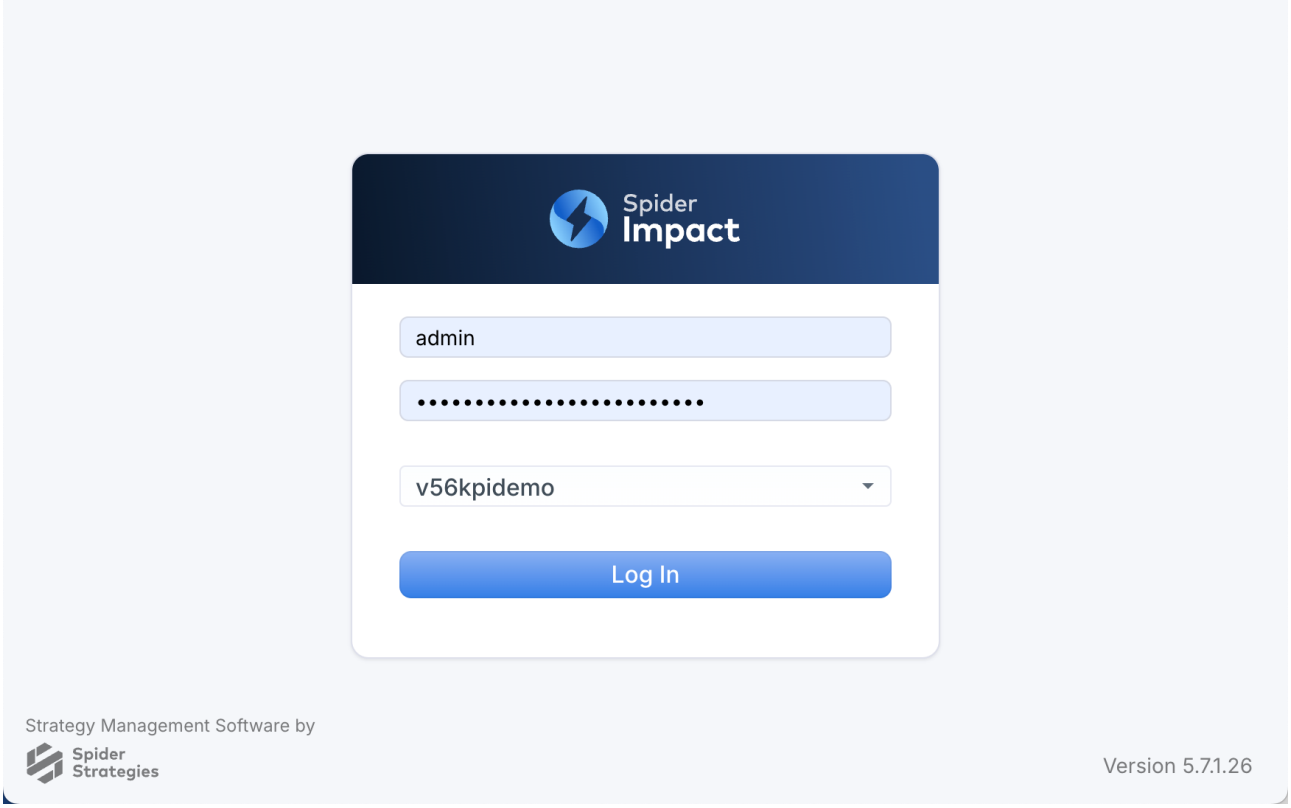
- **Task-Specific Experiences:** Create tailored applications for different departments or use cases, such as sales tracking, customer service, or project management.
- **Centralized Data and User Management:** Apps leverage Spider Impact's existing permissions architecture, ensuring secure and seamless data access.
- **Standalone Access:** Apps can be accessed independently of the main Impact UI, allowing users to interact with them via a dedicated URL.

Viewing and Accessing Apps

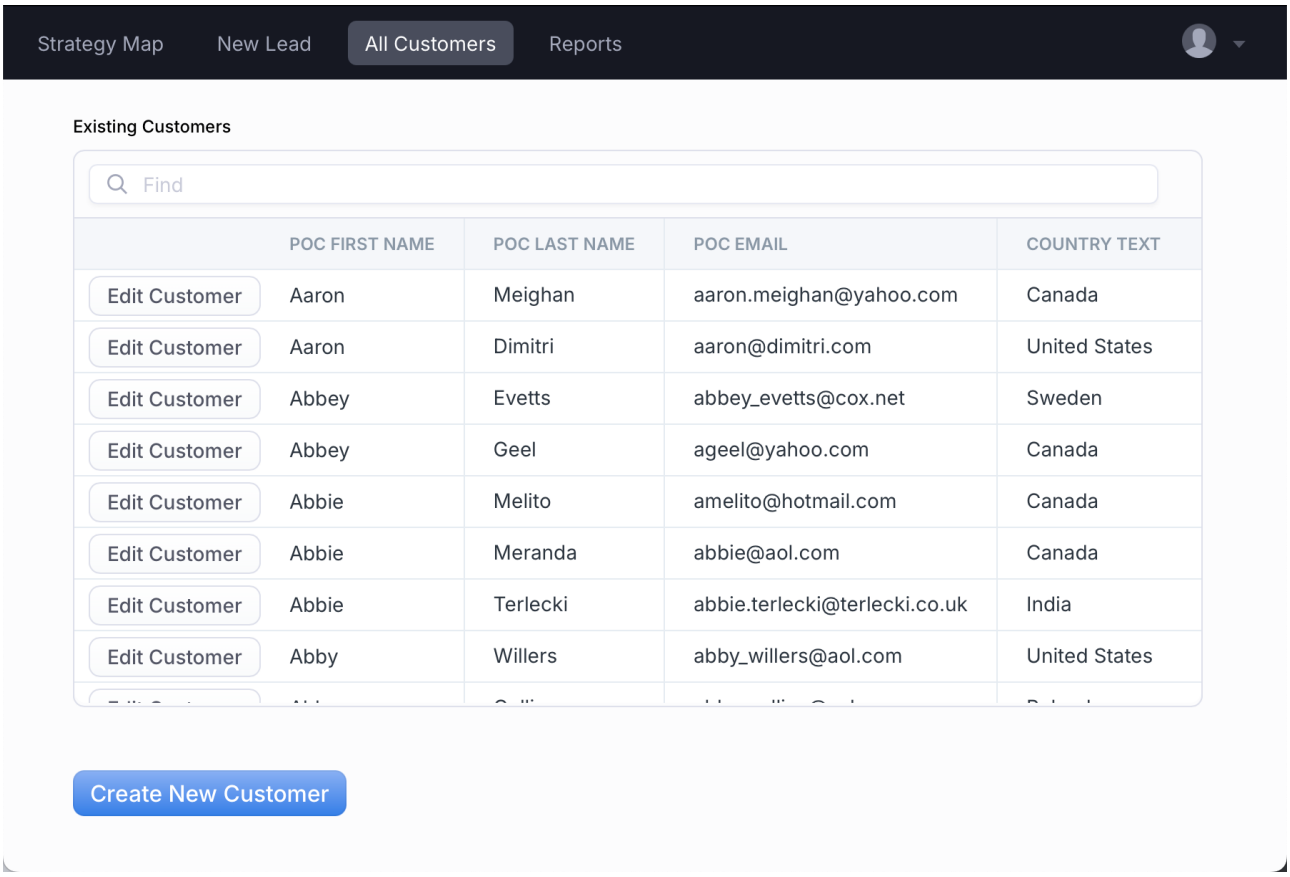
Apps provide a standalone experience separate from traditional Impact sections. When you navigate to an App's view tab, you'll see a single "Open App" button that launches the App in a new browser tab. Each App has its own dedicated URL, allowing you to create browser bookmarks for direct access.



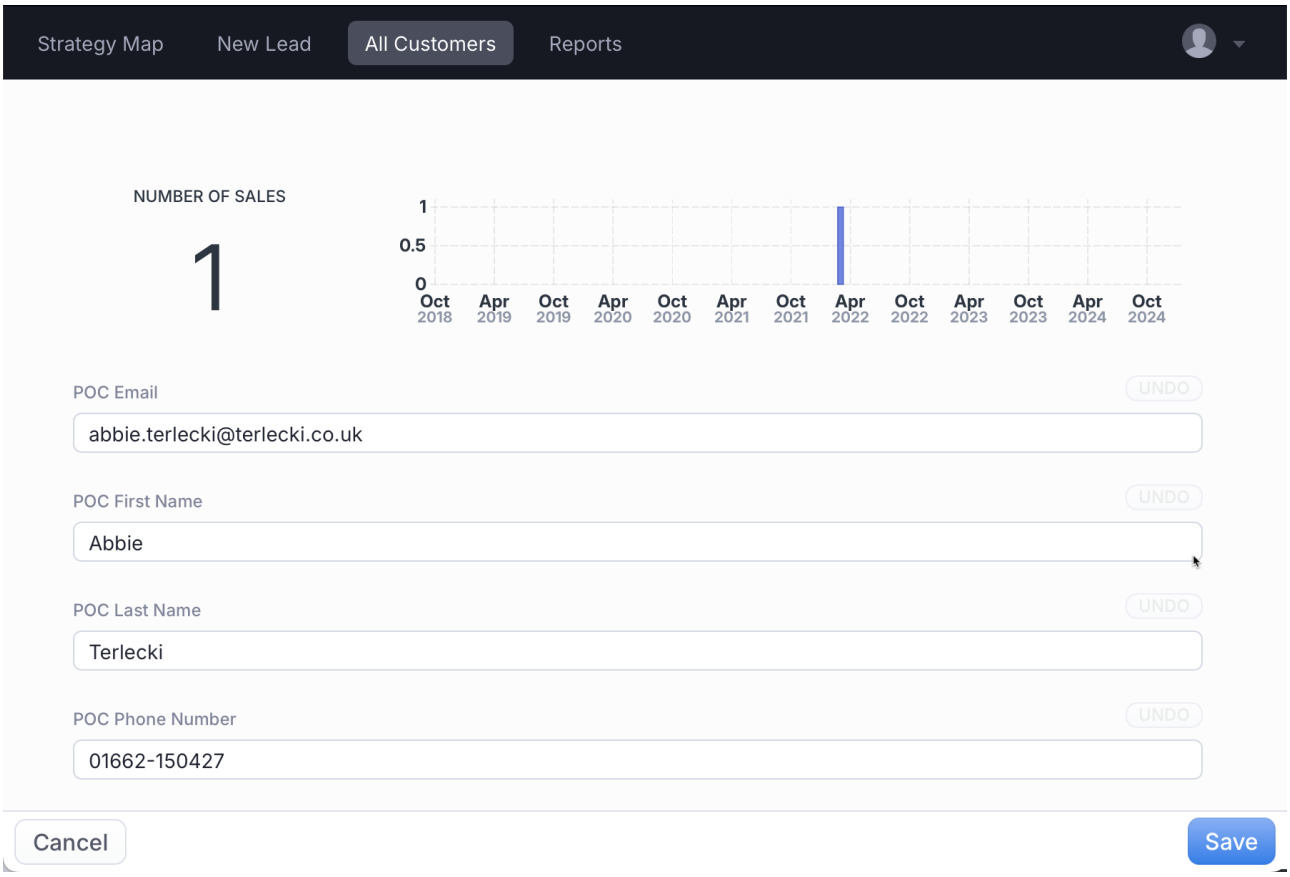
Apps require you to log in, and they share a security model with Spider Impact. You can only see data in Apps that you can already see in Impact.



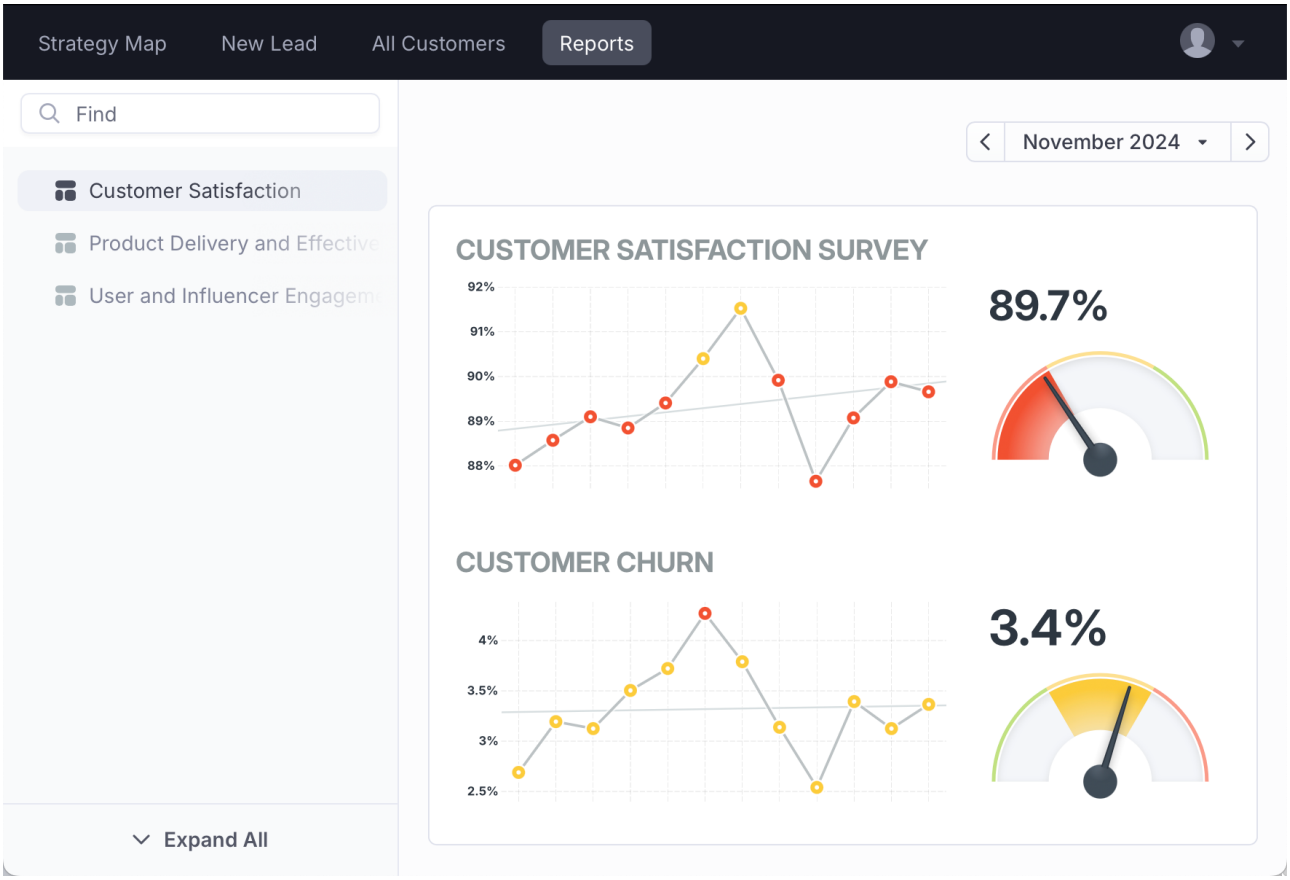
After logging in, you'll encounter a customized interface designed specifically for its purpose. Apps are built from existing Impact screens like Forms, Dashboards, and Reports. For example, this App has four sections. This "All Customers" section is a multi-page form that starts with a list of all customers.



When you click the "Edit Customer" link for a customer, you're taken to the customer details page where you can see a history of sales for that customer and edit the customer's contact information.



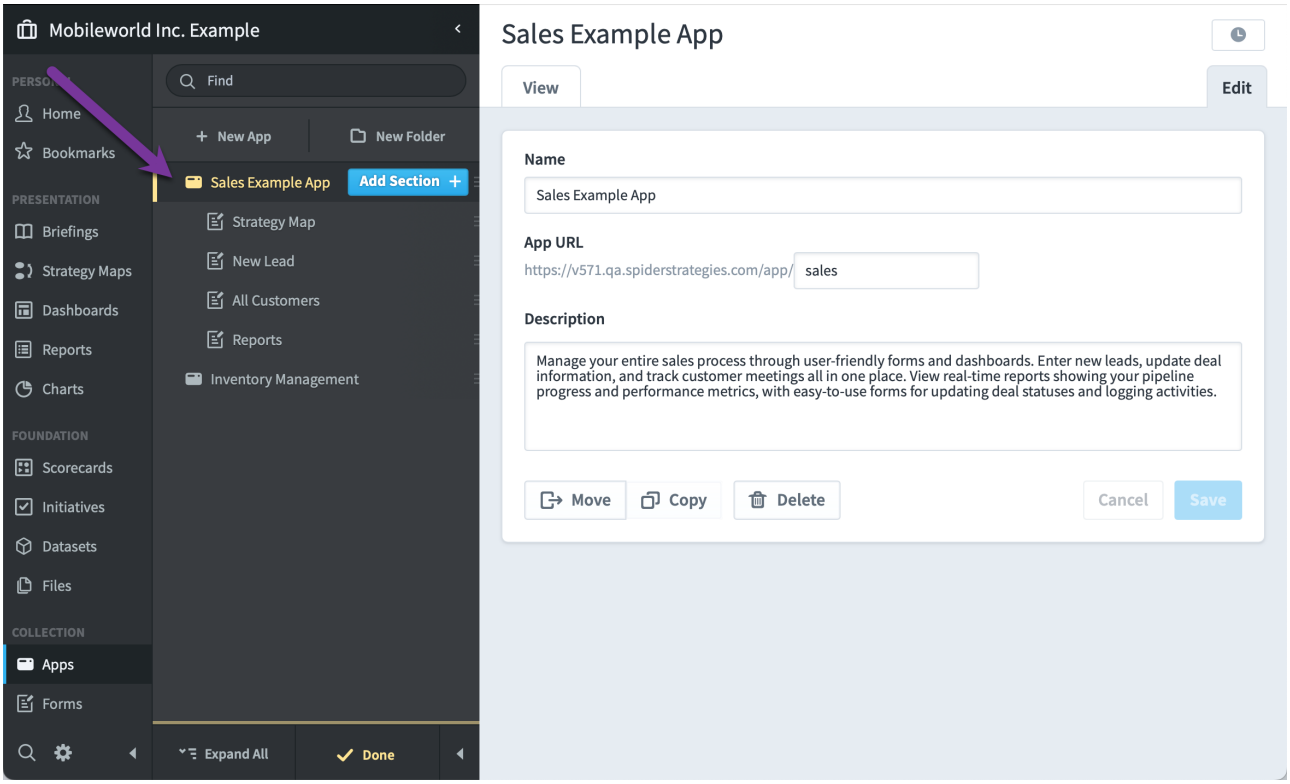
In this example, the "Reports" section allows you to choose between several dashboards, each displaying various sales data visualizations.



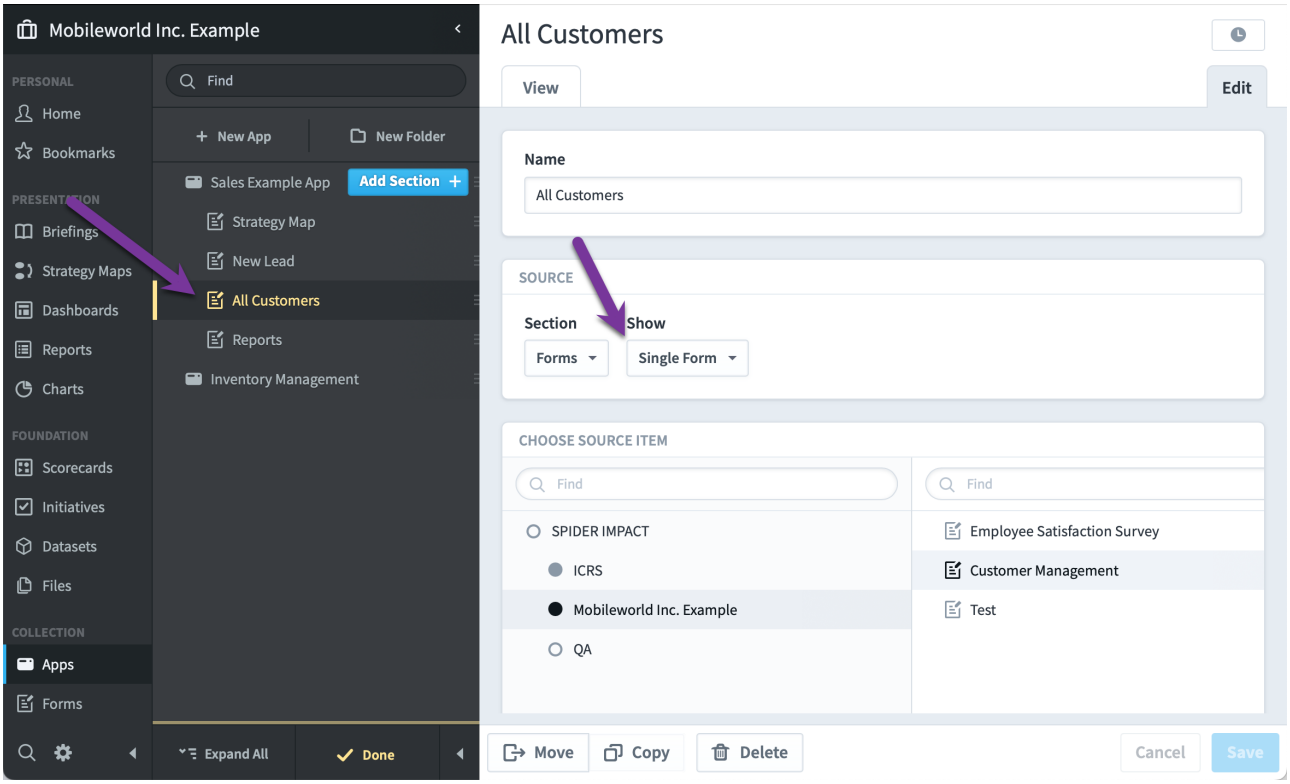
Creating and Managing Apps

Like every section in Spider Impact, Apps reside in organizations and follow the standard Spider Impact permission model. This means you can access every app in your viewable organizations. The "Modify Apps" permission allows administrators to configure and manage Apps in their viewable organizations.

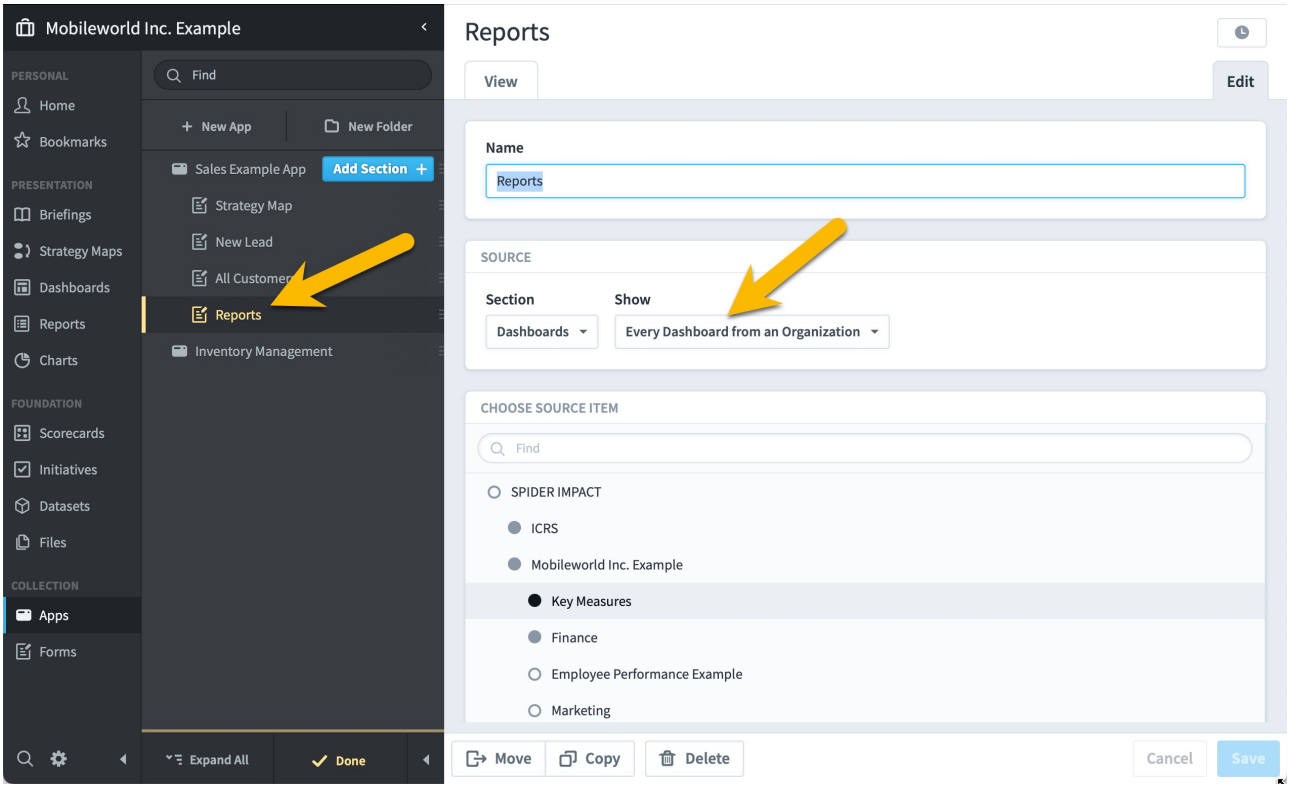
The Edit tab within the Apps section allows administrators to manage App settings. Here, the app itself is selected, and you can set the app's name, URL, and description.



Like editing Form Pages, when you edit an App, all its sections appear underneath it. Here we've selected the "All Customers" section and we can see that this App Section shows a single Form.



When you select the "Reports" section, you can see that it's showing every dashboard from an organization.



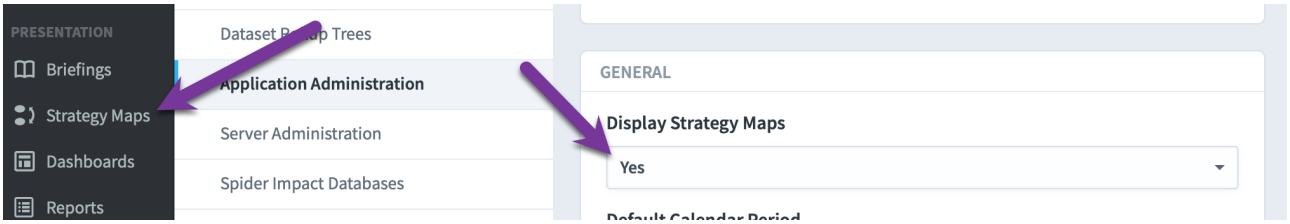
Because Apps use Spider Impact's existing permissions, if a user can't see a page inside of Spider Impact and that page is being used for an App's section, that section will be hidden for them inside of the App. This allows you to create apps with sections that only appear for some users.

Application Administration

Choosing Terminology and Methodology

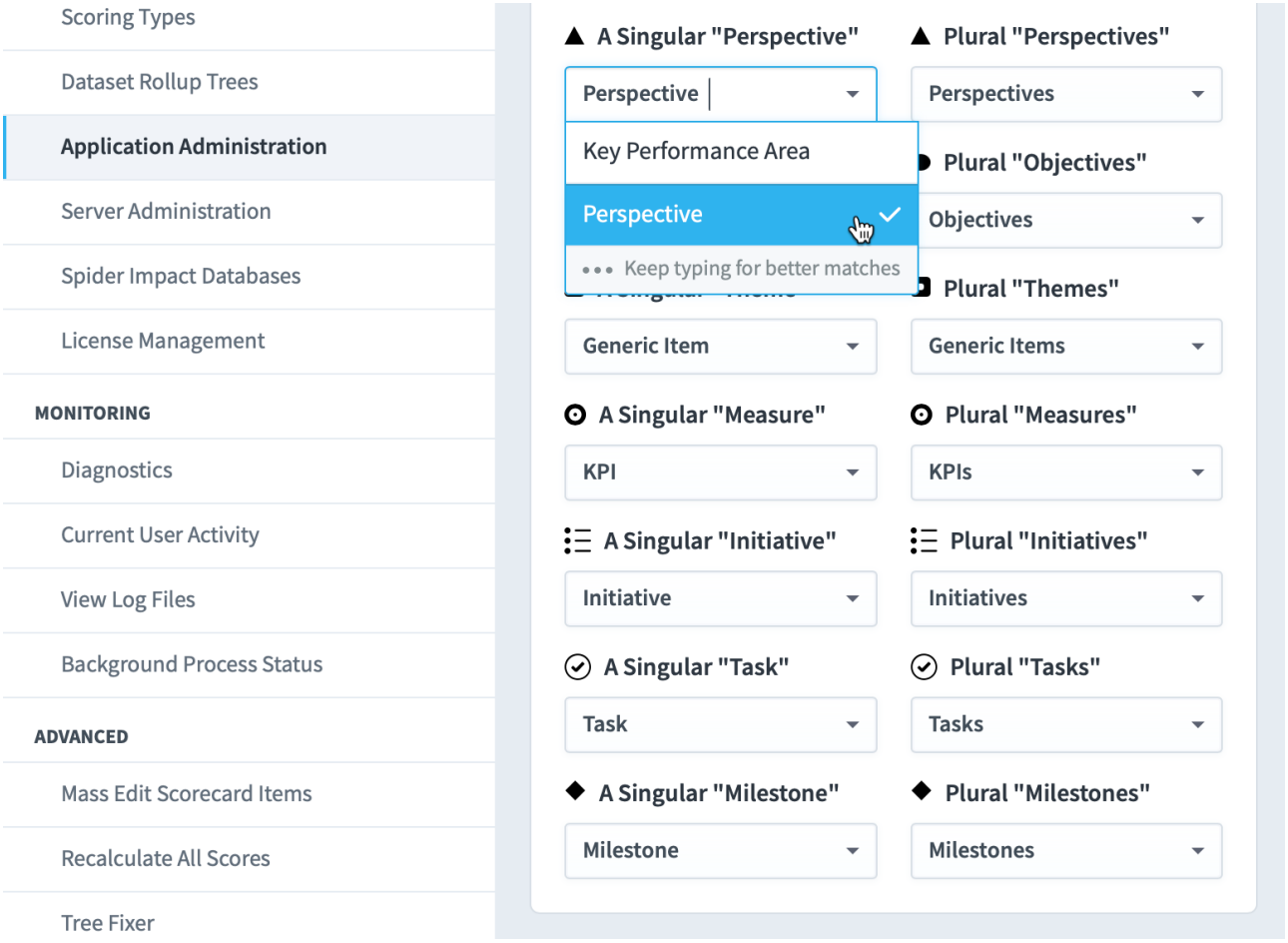
Enabling and Disabling Strategy Maps

Strategy Maps are similar to Dashboards, but they're solely focused on showing your big-picture strategy. If your organization doesn't use the balanced scorecard methodology, however, you can disable Strategy Maps in Application Administration and just use Dashboards.

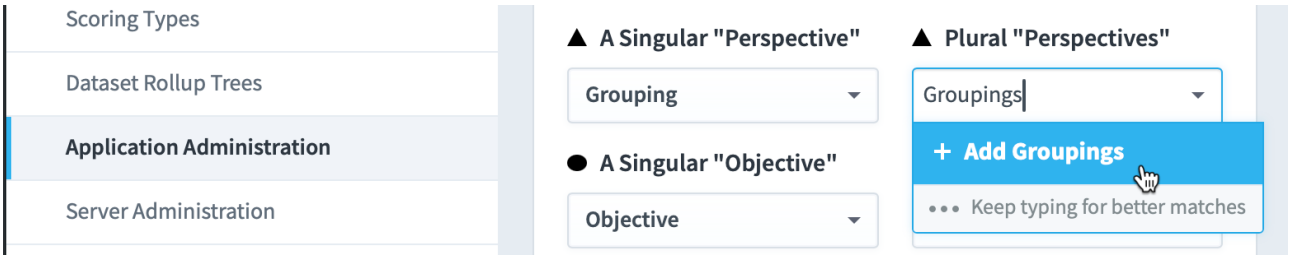


Configuring Initiative and Scorecard Item Names

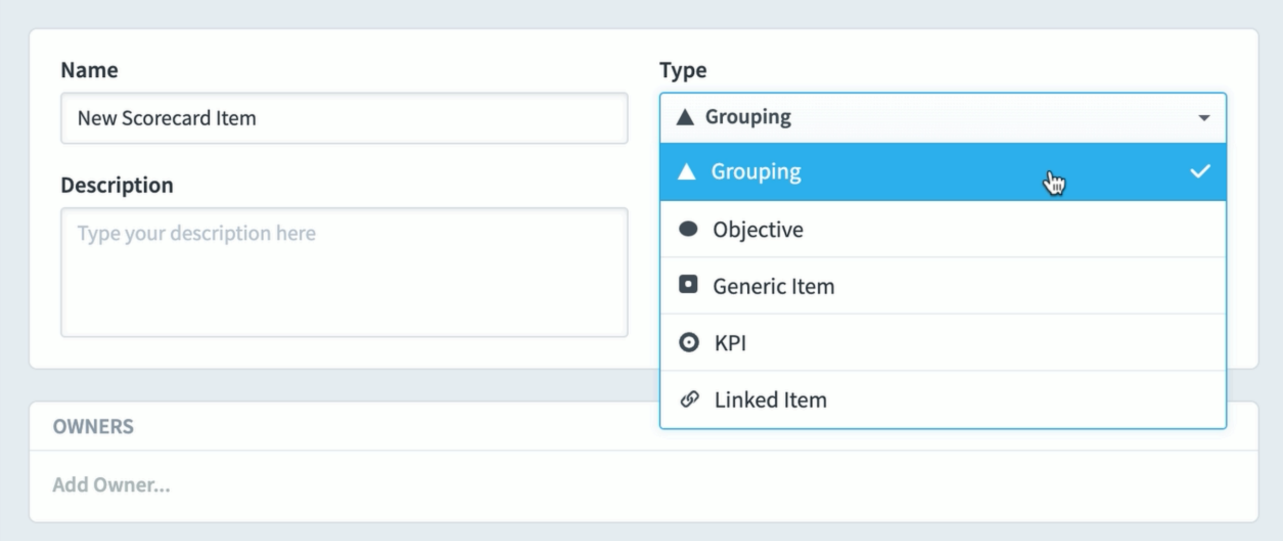
Many organizations have names for their performance items that differ from the standard Spider Impact defaults. You can now configure these scorecard and initiative item names in Application administration. You can choose from popular pre-defined names like "Key Performance Area" and "Perspective".



Or you can type whatever language you want. In this example we're using the term "Grouping".



Now when we create a scorecard item, it calls the object a Grouping.



Further Language Customizations

Every phrase in Spider Impact can be replaced with wording that you choose, including translating the entire app into another language. This requires maintaining your own customer message resource file. For assistance, please contact support@spiderstrategies.com.

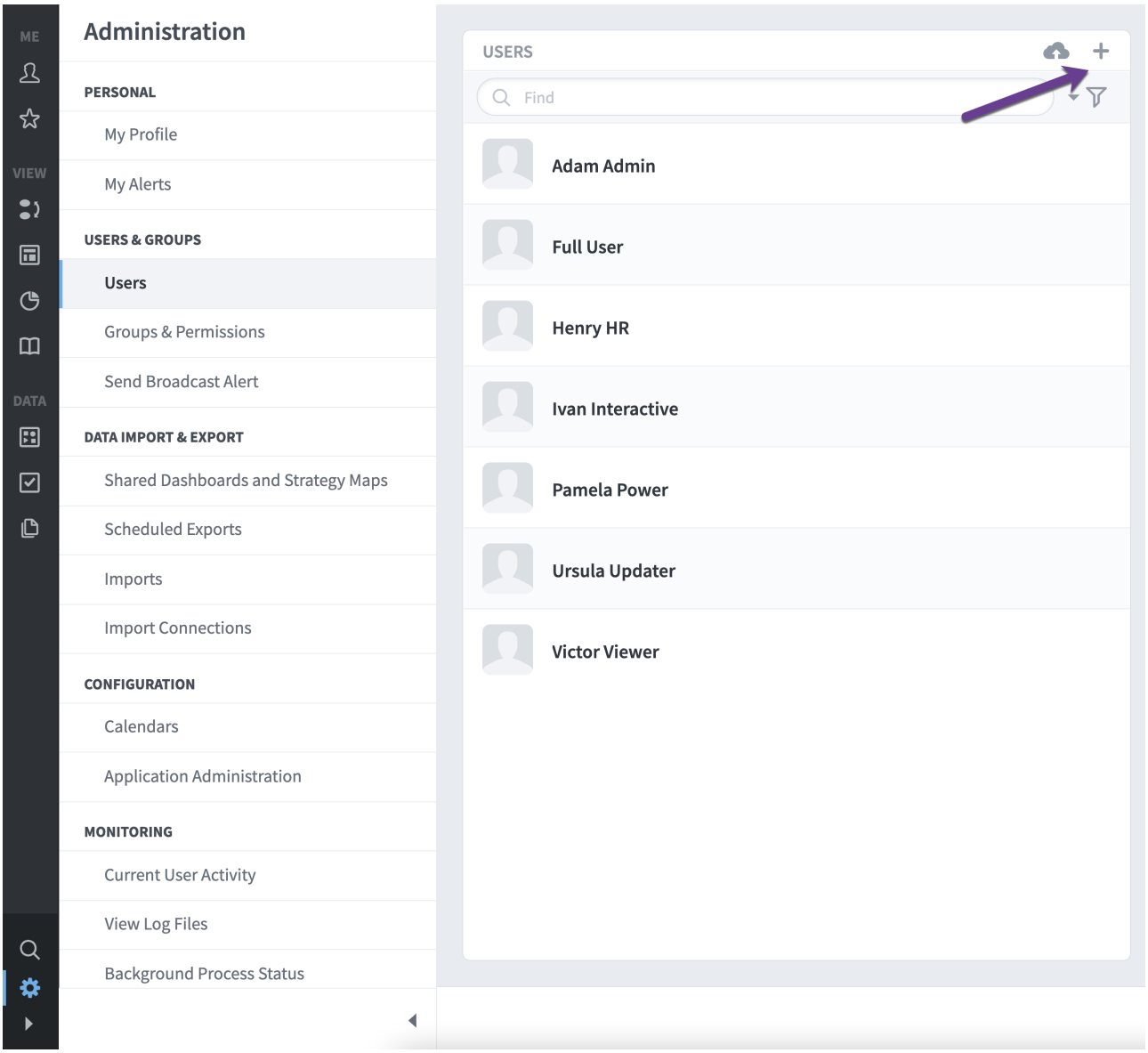
Users

Overview

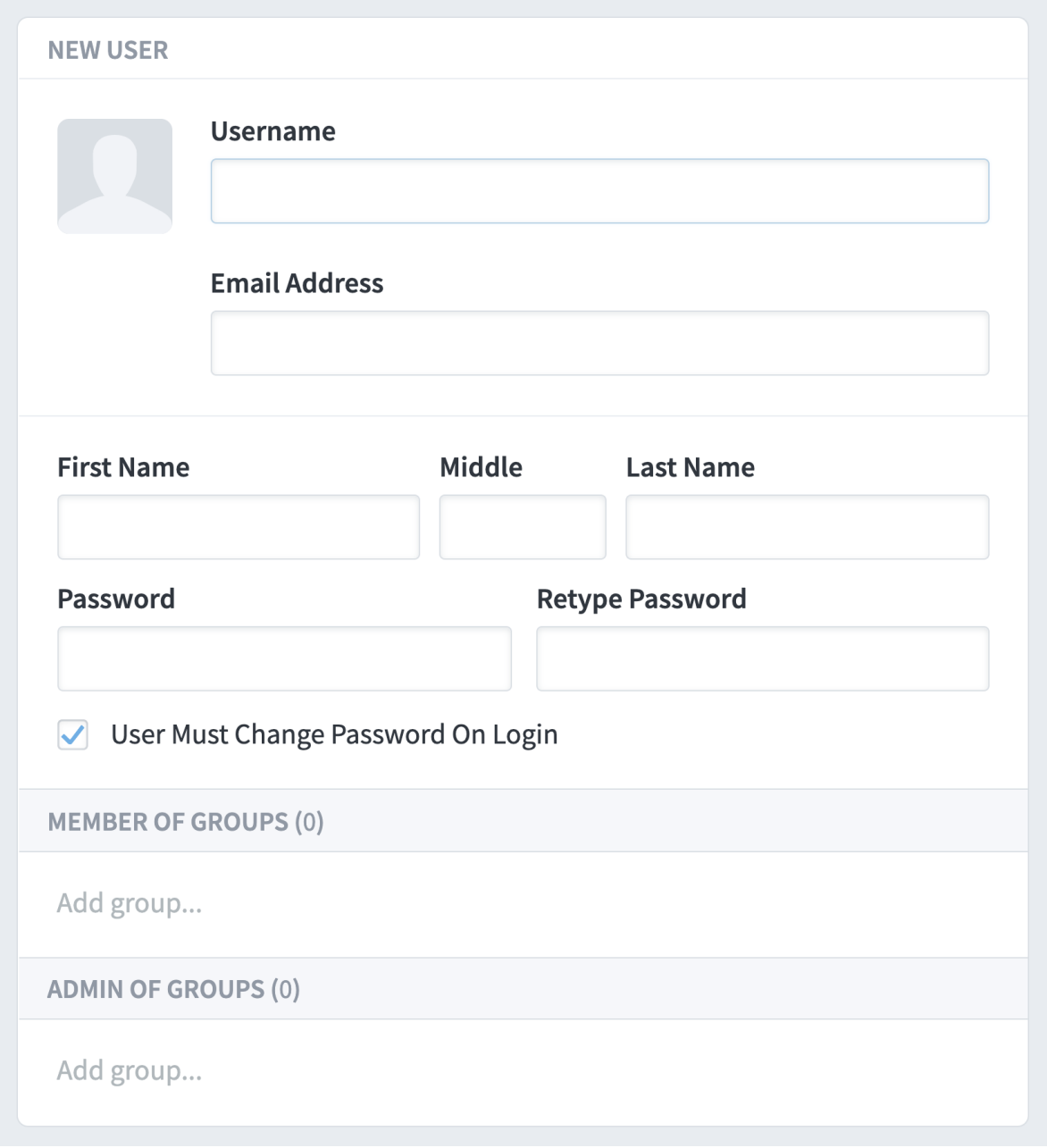
Users are created and managed on the Admin > Users screen.

Adding Users

You can add a new user using the + button.

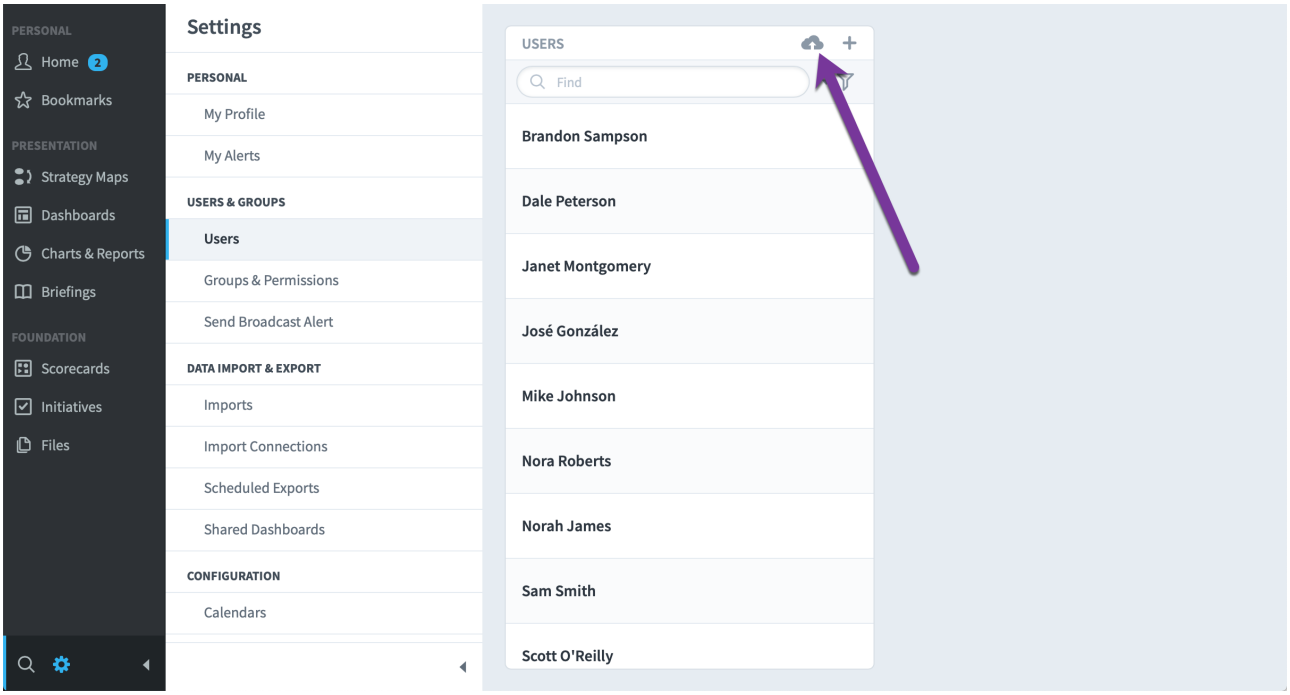


You can then enter a username, email address, first and last name, and password. You have the option of whether or not the user must change their password on initial login, and can assign the user as a member or admin of a group.

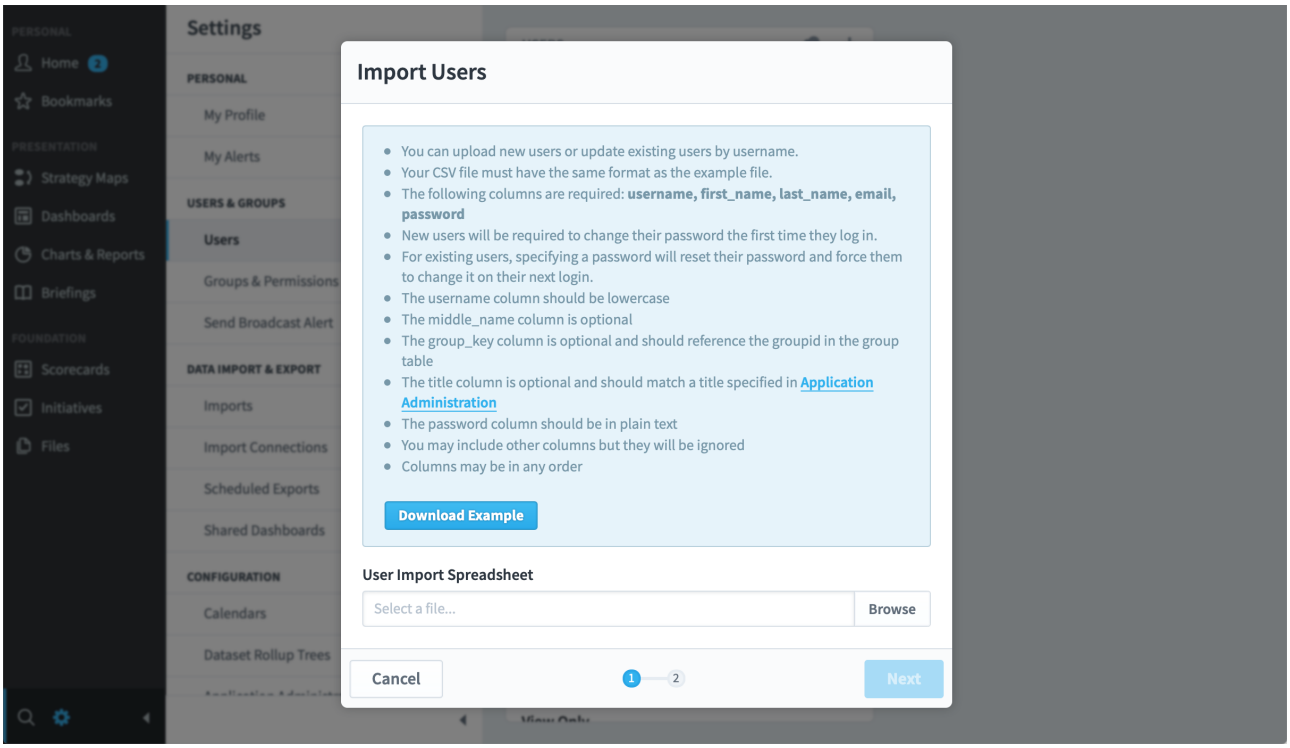


Importing Users

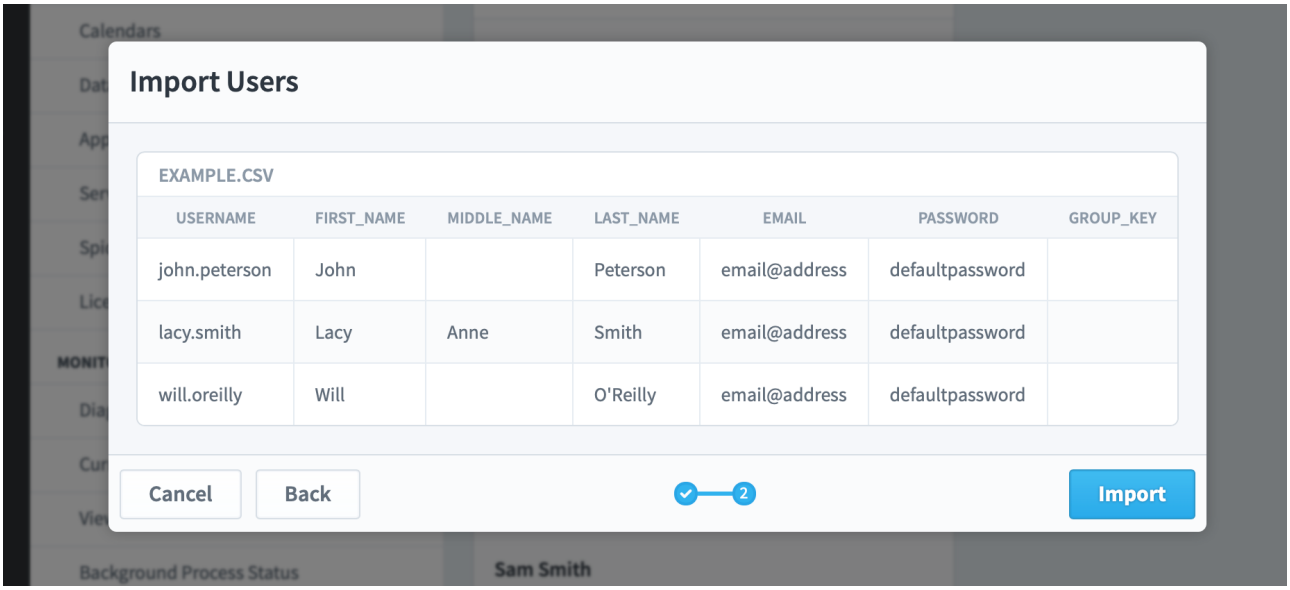
Rather than manually adding users one at a time, administrators can import multiple users at a time via spreadsheet. To start, just click on the "Import" button.



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.

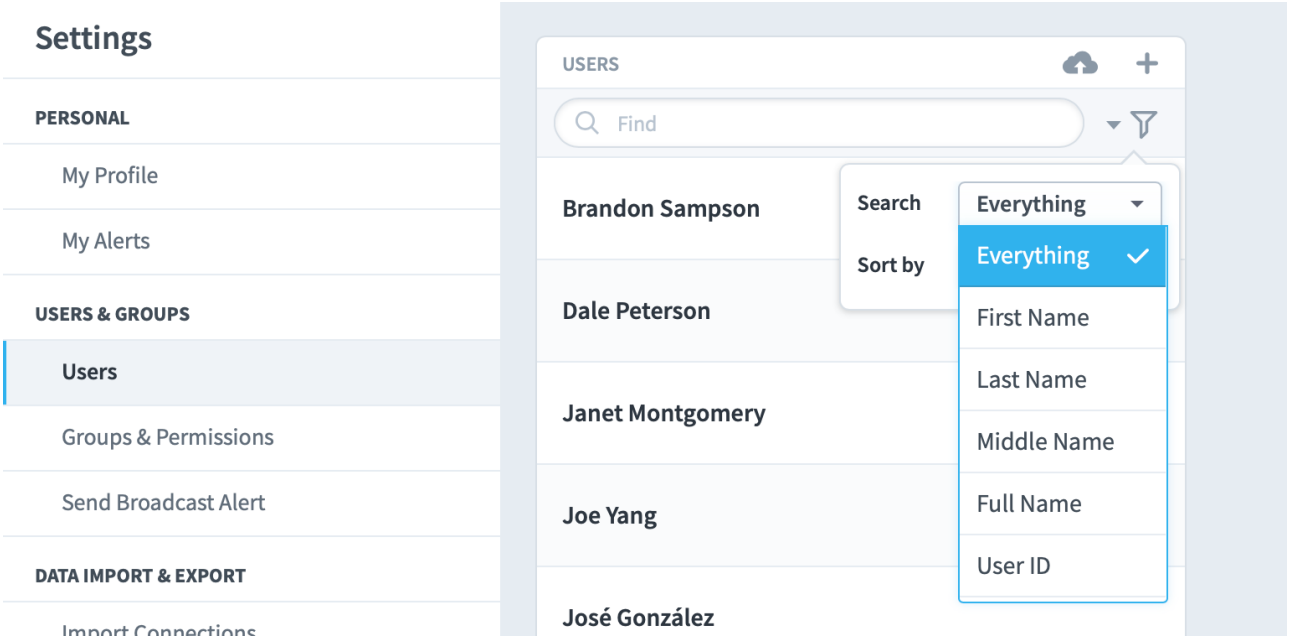


Before you run the import, you can preview your data and you will be alerted to any invalid fields. For existing users, specifying a password will reset it and force them to change it on their next login.



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.

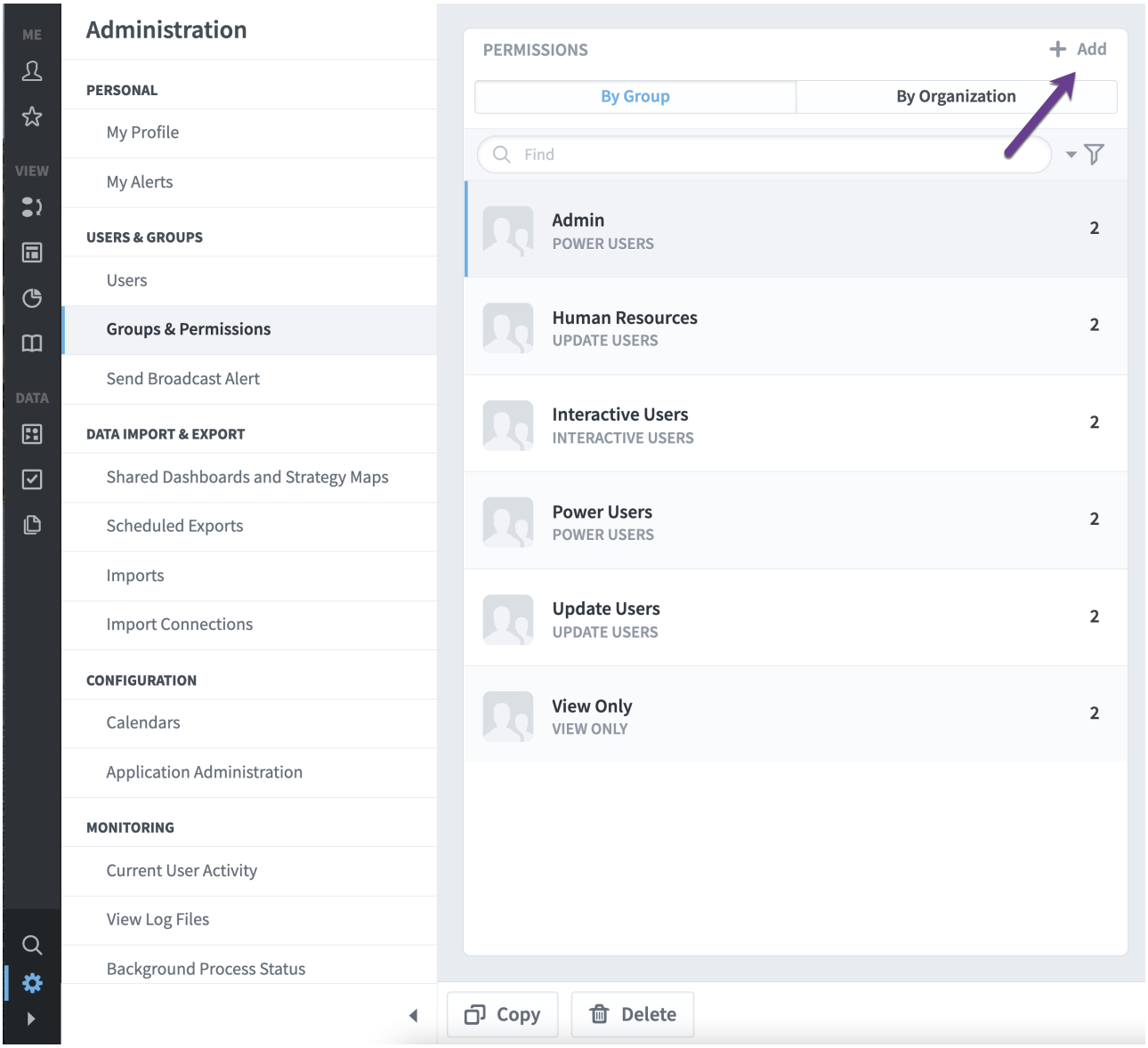
Groups

Overview

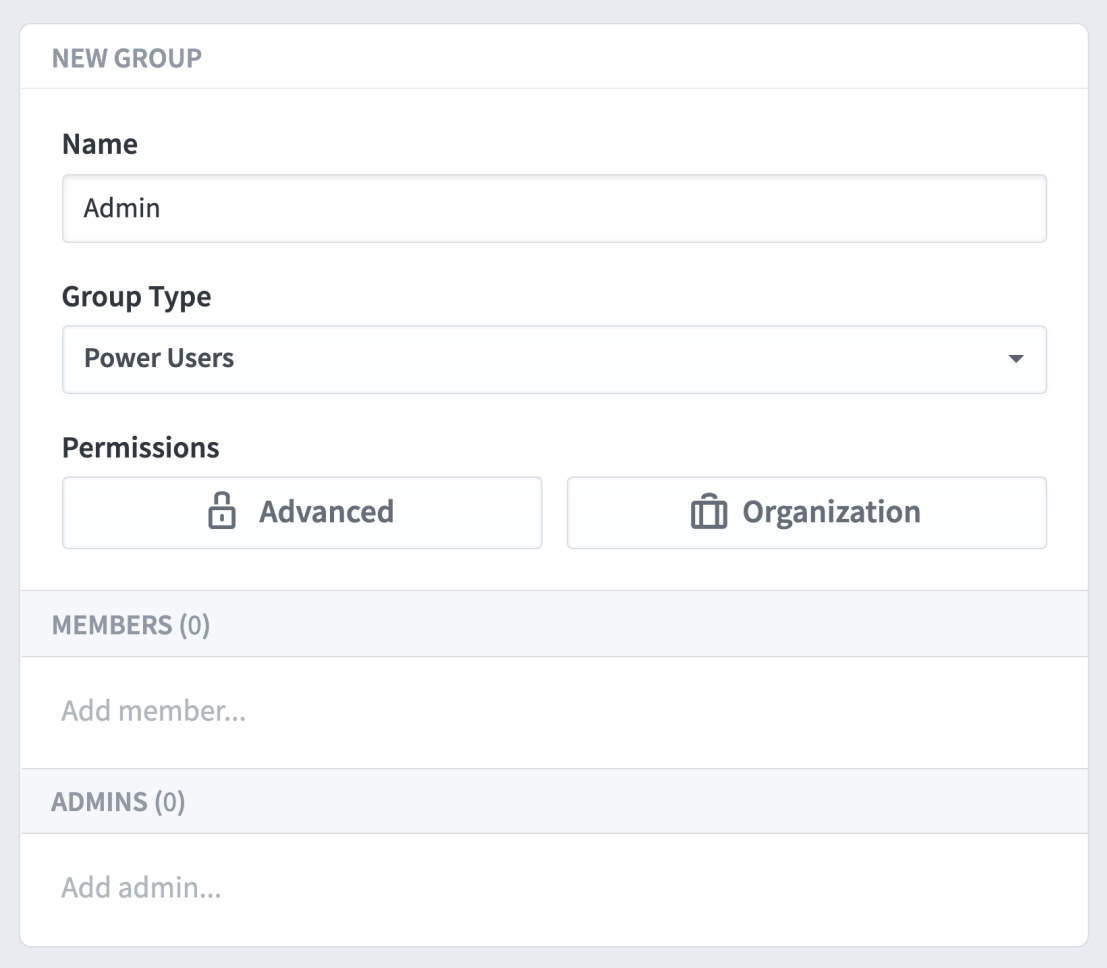
Groups are created and managed on the Admin > Groups & Permissions screen. Groups determine permissions within Spider Impact. Permissions applied to a group are granted to all of its members.

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.

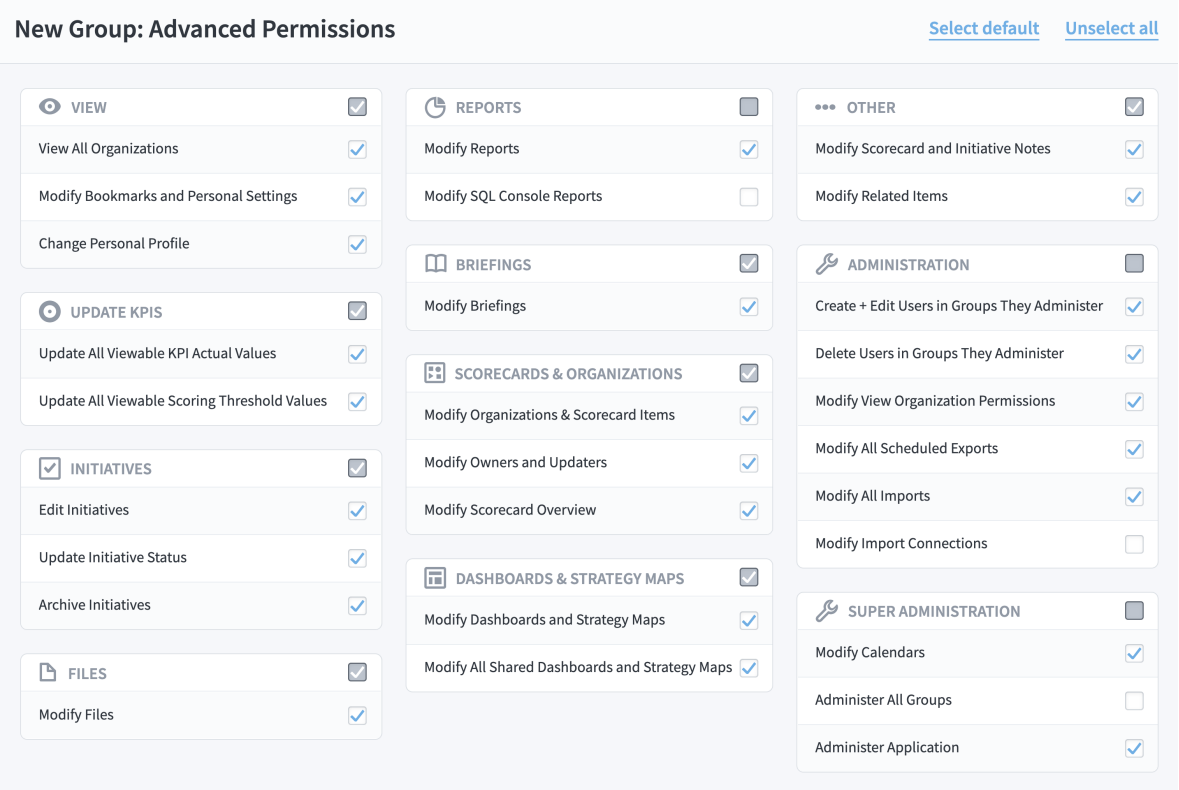


Group Types

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

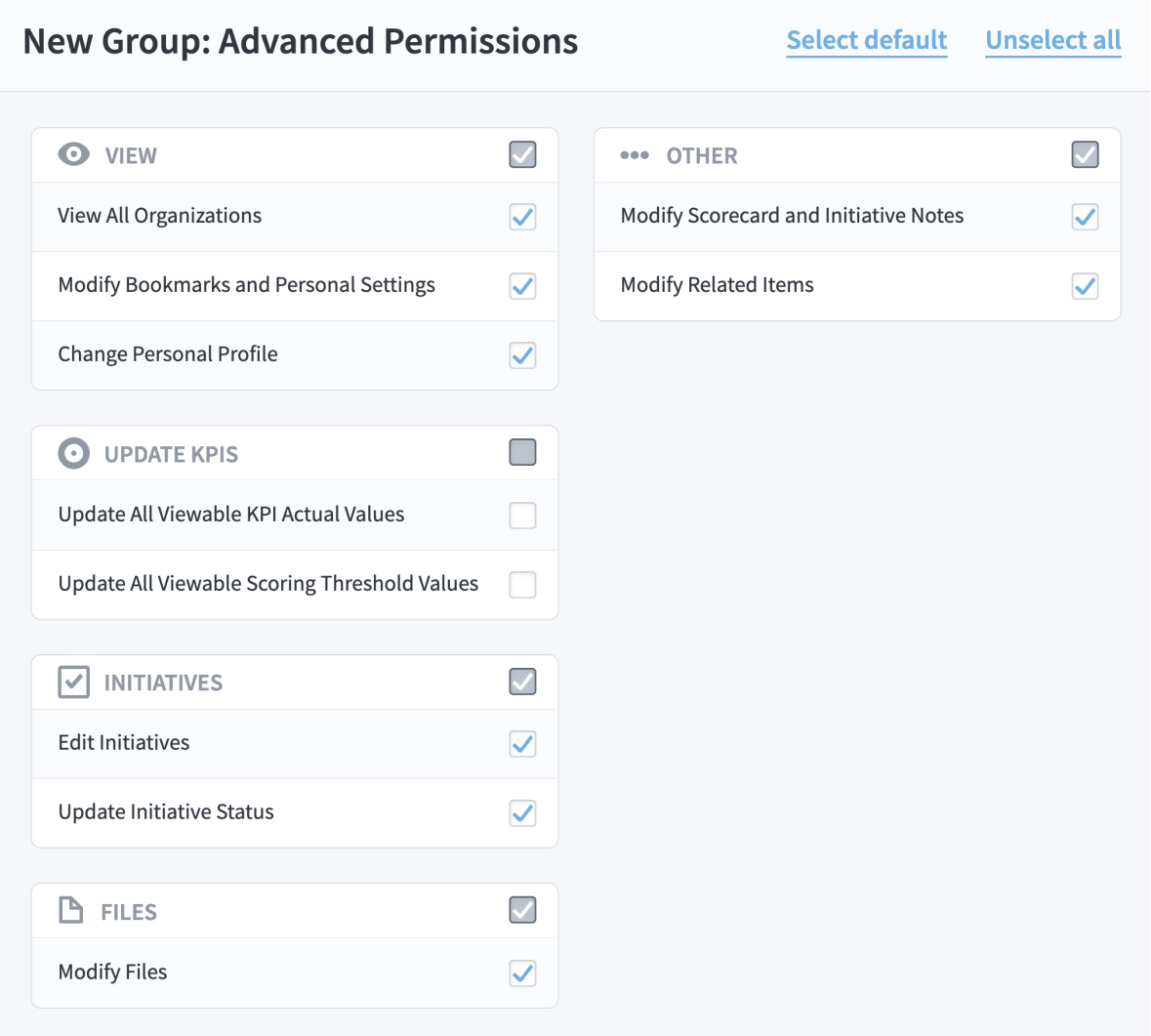
Power Users

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



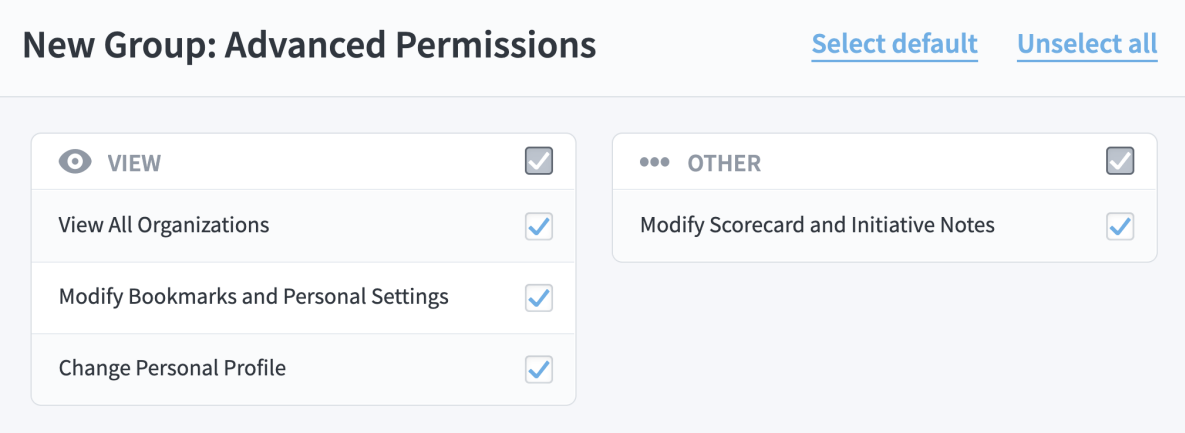
Update Users

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



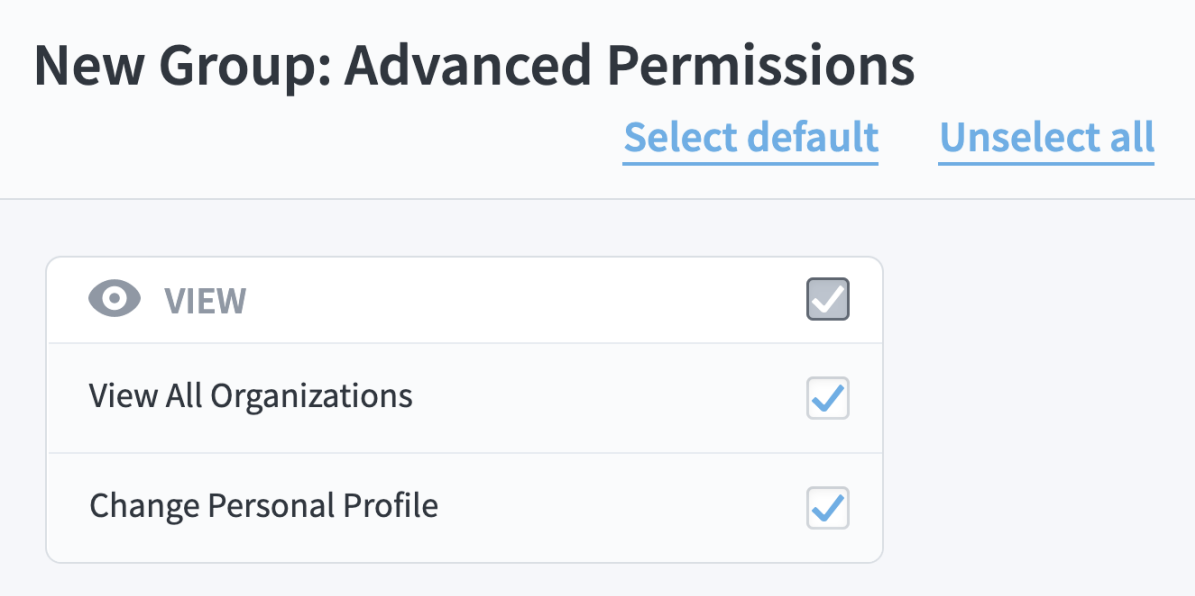
Interactive Users

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.



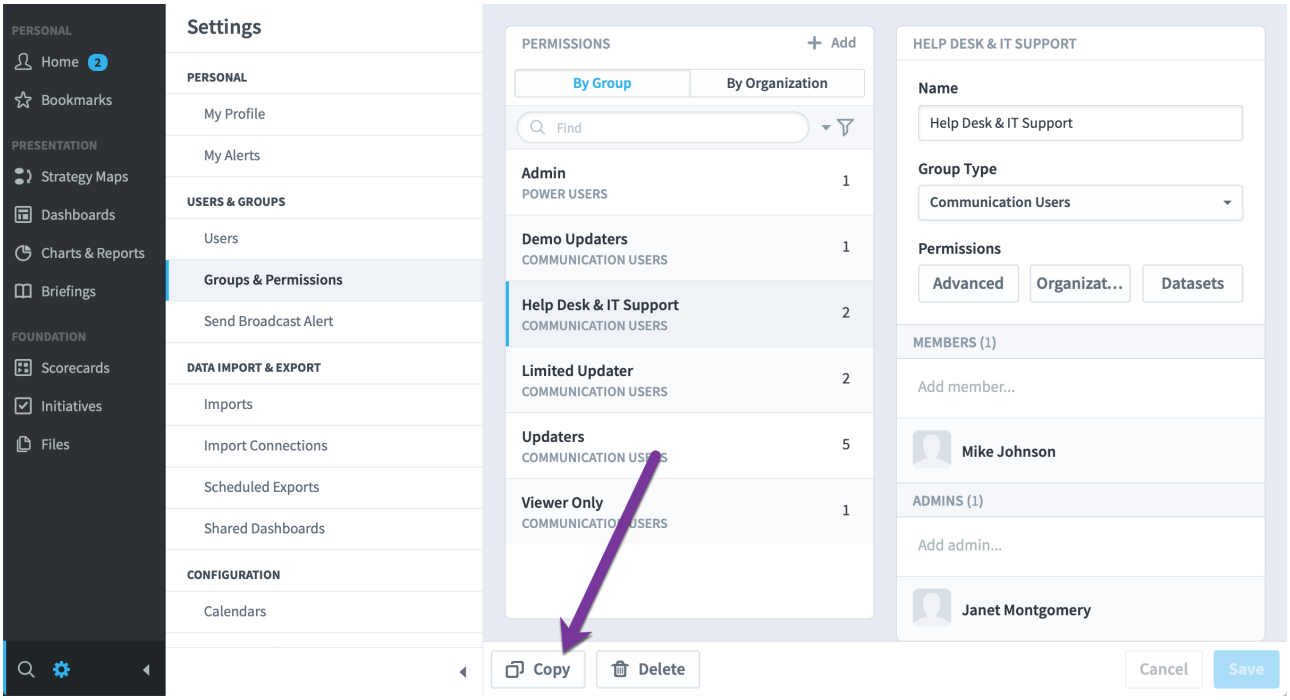
View Only

View Only users can only view things in Spider Impact.

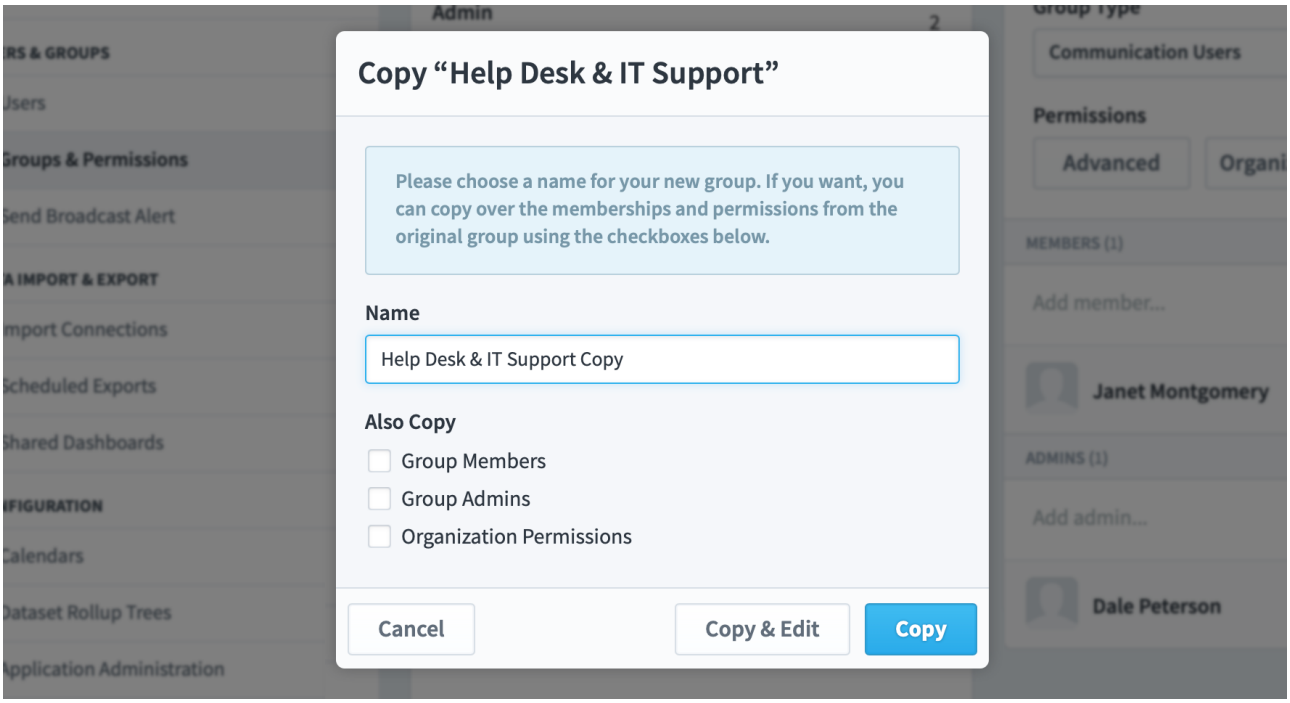


Copying Groups

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

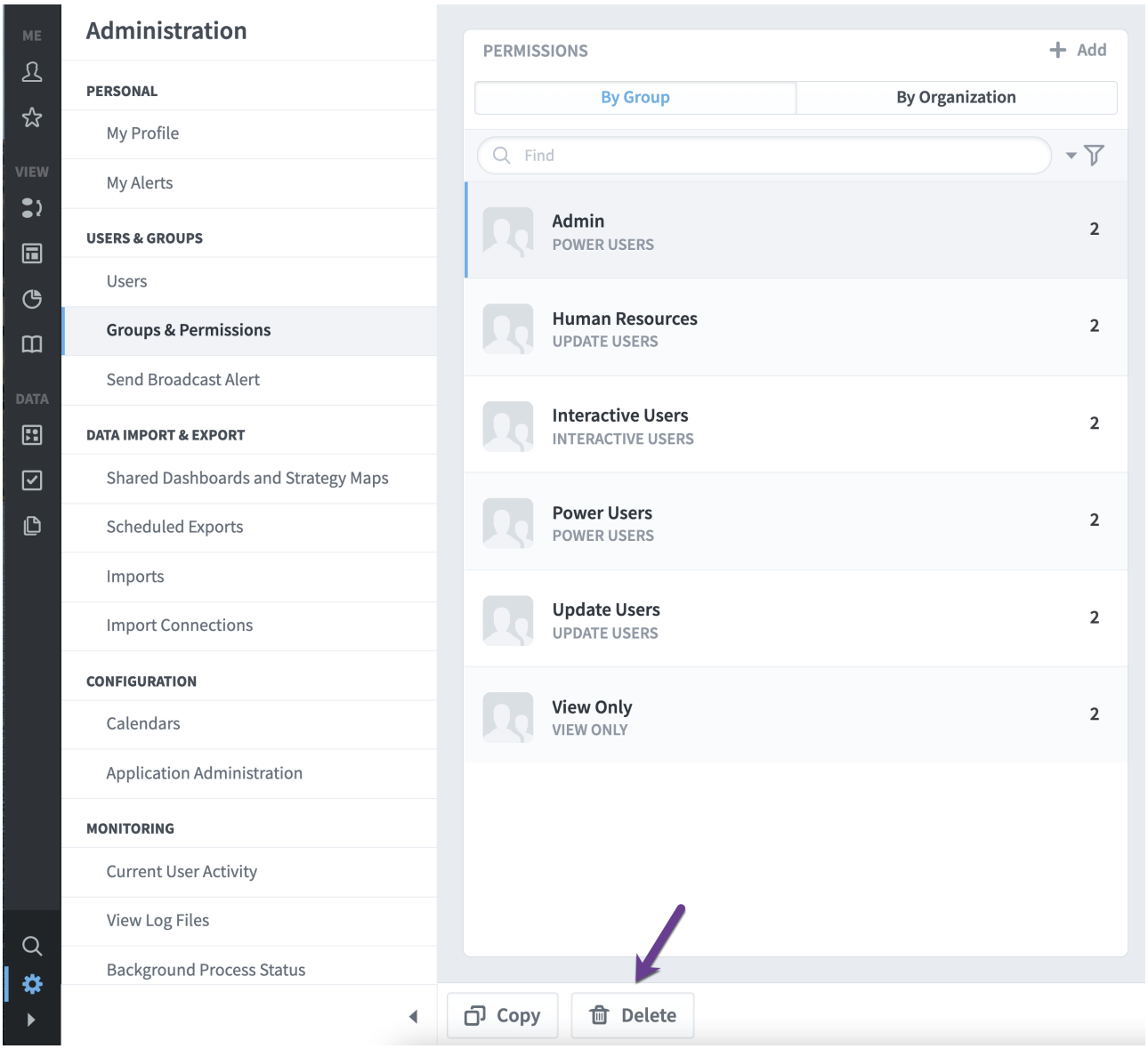


You can then rename the group, and choose whether or not to copy the original group's members, admins, and organization permissions (Advanced permissions automatically carry-over).



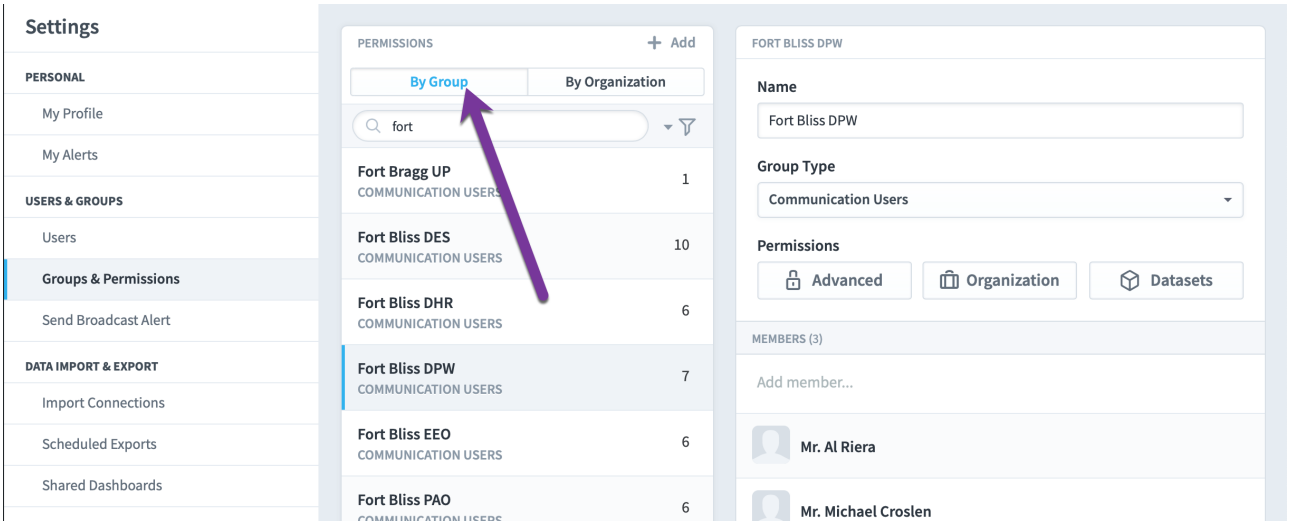
Deleting Groups

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



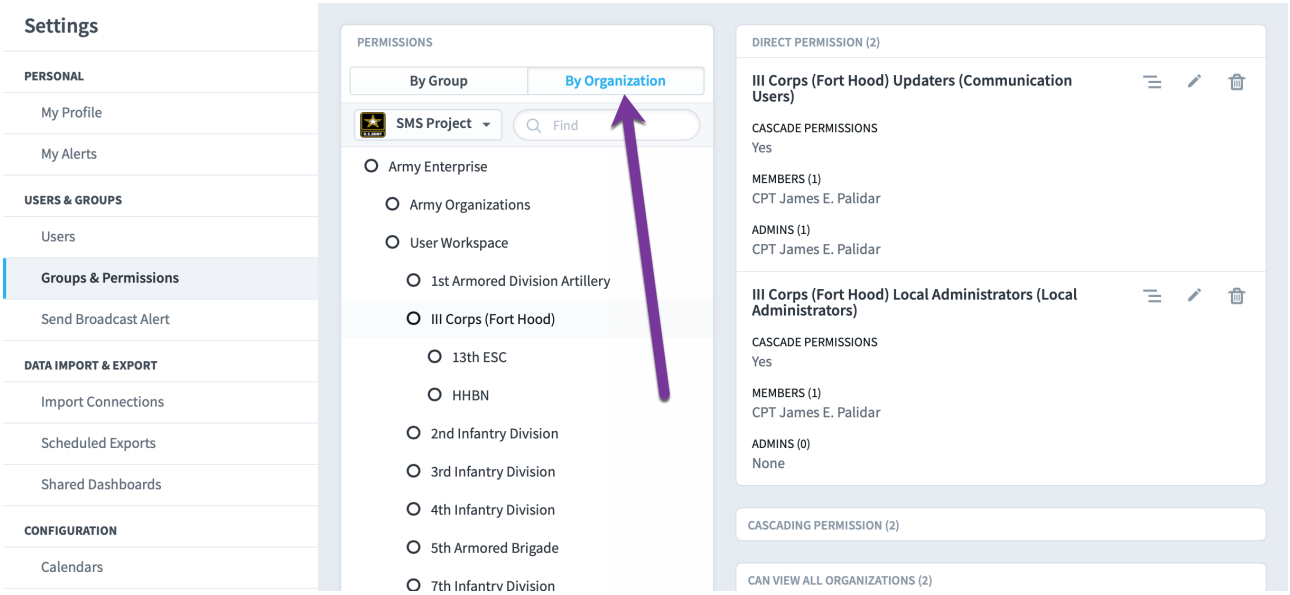
By Group vs. By Organization

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



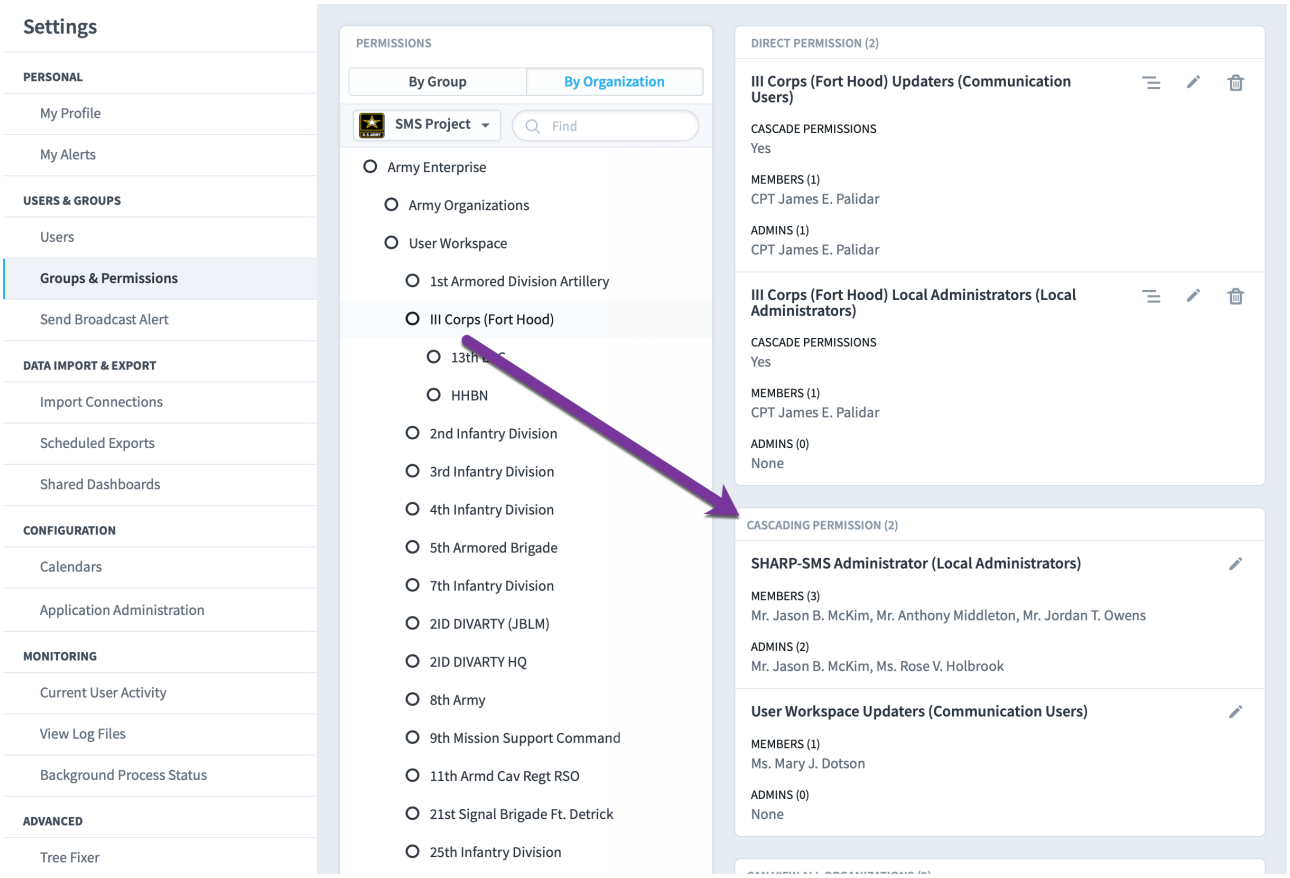
The "By Organization" view allows administrators to see all groups who can view a particular organization. The idea here is that you can choose an organization and then see exactly who has permission to view it.

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

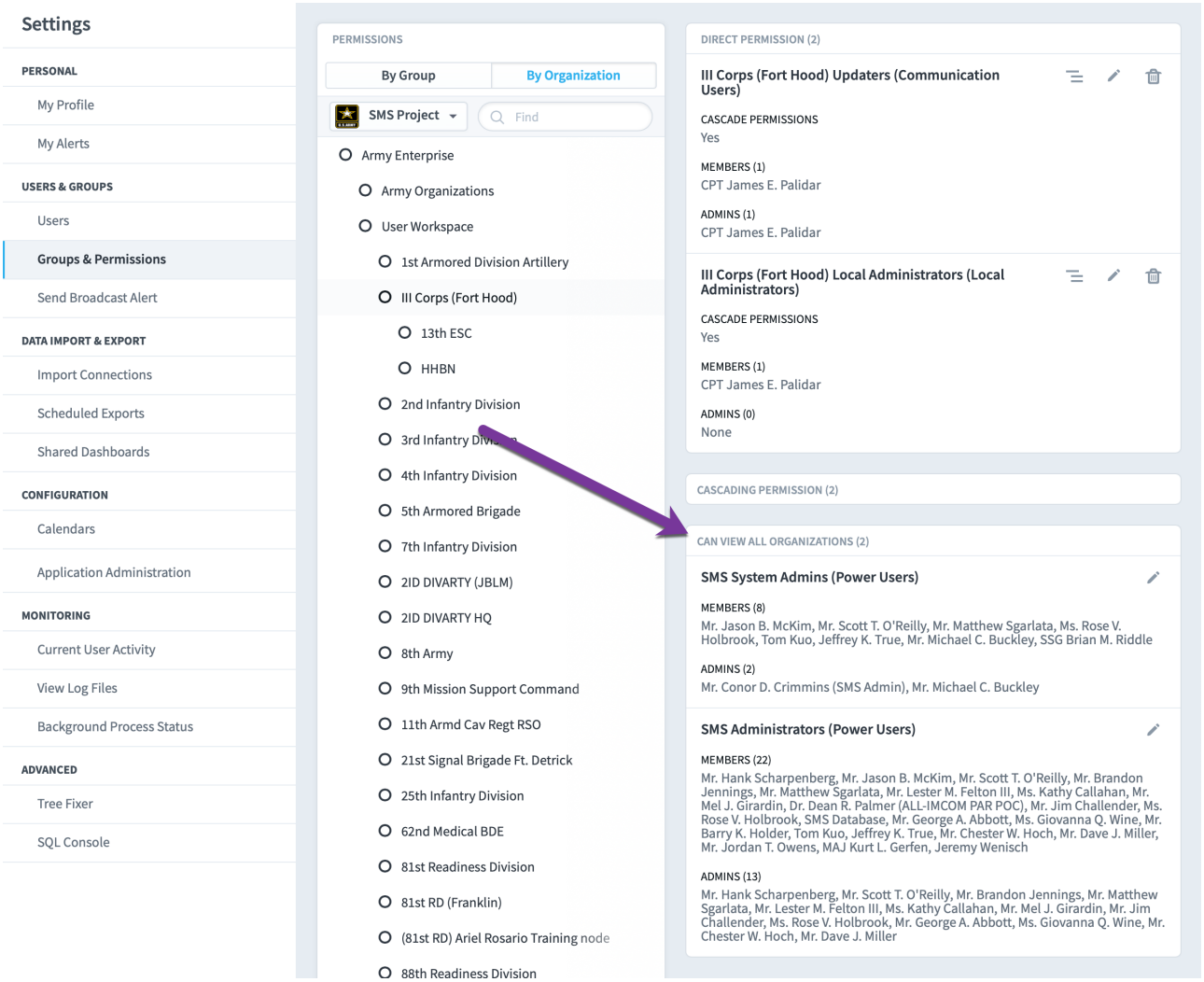


Administrators can also expand the "Cascading Permissions" box to see the groups who can see the selected organization based on permission to a higher-level

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