

Using Spider Impact[™]

Spider Impact 4.0 User Guide Updated February 7th, 2021

www.spiderstrategies.com

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Your success is important to us!

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

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

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 onsite services available if they're a better match for your requirements.

Personal

Home Section

Welcome

When you first log into Spider Impact you see the Welcome screen in the Home section.



This gives you a quick overview of your most important information.

- The welcome message can be edited by an administrator and can contain a logo and videos.
- 2. You'll see your most recent alerts here. There's also a link that takes you to the alerts page that we discuss next.
- 3. You can see the number of KPIs you own and update, as well as any tasks that are assigned to you. Clicking on one of these rows will take you to that

page described below.

4. This help link defaults to sending requests to Spider Strategies, but administrators can change it to send help requests to any email.

Alerts

The Alerts section shows you all of the alerts you've received.



KPI Updates

On the KPI Updates page you can update all of the KPIs that you have been assigned to as an Updater.

PERSONAL	Home					F. J	
री Home 2	Welcome	KPI UPDATES マ Y				February 2020 👻	< >
☆ Bookmarks	Alerts 2	крі	PERIOD	ACTUAL	2	THRESHOLDS	
PRESENTATION	KPI Updates	FINANCIAL					
 Strategy Maps Dashboards 	My KPIs	Product Revenue	February 2020	453,450 \$	450,000	\$ 465,000	\$
🕒 Charts & Reports	My Tasks	Book Revenue	February 2020	35,650 \$	35,000	\$ 40,000	\$
Briefings FOUNDATION		Product Costs	February 2020	274.981 \$	275 834	\$ 275.000	\$ =
Scorecards				211,001	213,034	213,000	
 ✓ Initiatives ▲ Files 		Training Venue Costs	February 2020	38,572 \$	39,584	\$ 38,750	\$
		Book Production Costs	February 2020	8,279 \$	8,334	\$ 7,500	\$
		Total Gross Profit	February 2020	448,574 \$	422,250	\$ 432,917	\$
Q 🌣 🔺	•	Reset All					Update KPIs

There are a few extra controls on this page to make it easier to update large numbers of KPIs.

- 1. The filter control allows you to filter by organization as well as KPI calendar period.
- 2. You can upload a spreadsheet with KPI values rather than typing in the values by hand.

My KPIs

This shows you all of the KPIs that you have been assigned to as an Owner.

PERSONAL	Home				
႔ Home 2	Welcome	• 2 KPIs	3 KPIs	0	4 KPIs
☆ Bookmarks	Alerts 2				
PRESENTATION	KPI Updates	MY KPIS			
Strategy Maps	My KPIs	KPI NAME	PERIOD	SCORE	ACTUAL
Dashboards		FINANCIAL			
🕒 Charts & Reports	My Tasks	O Book Revenue	February 2020	3.8	\$35.7K
Briefings		O Interest & Bank Charges	February 2020	10	\$3,617
FOUNDATION		National Insurance	February 2020	0	\$68.9K
Scorecards		Office Rental	February 2020	10	\$9,334
✓ Initiatives		O Product Revenue	February 2020	4.1	\$453K
L Files		MARKETING			
		• Article Mentions	February 2020	2.2	11
		• Facebook Likes	February 2020	0.5	132
		Google Search Position	February 2020	4.4	4
		• Twitter Mentions	February 2020	1.1	0
∀₽ (•				

On the top of the page is a summary of how many KPIs you have of each color. You can click on each summary box to only show KPIs of that color.

My Tasks

My Tasks is similar to My KPIs, except it shows you all of the tasks from the Initiatives section that you're an owner of.

PERSONAL	Home						
<u>री</u> Home 2	Welcome	1 Task	1 Task				
ති Bookmarks	Alerts 2						
PRESENTATION	KPI Updates	MY TASKS					
Strategy Maps		TASK NAME	START DATE	END DATE	% COMPLETE	BUDGET SPENT	TOTAL BUDGET
Dashboards	ing it is	MOBILEWORLD INC.					
🕒 Charts & Reports	My Tasks	Build a SEO Capability	Jan 1, 2019	Apr 30, 2020	76%	\$232K	\$365K
🖽 Briefings		Migrate Servers to Cloud	Jul 1, 2018	Dec 1, 2019	95%	\$140K	\$150K
FOUNDATION							
Scorecards							
Initiatives	•						
🗅 Files							
Q 🌣 🛛 📢	٩						

Bookmarks

Overview

The Bookmarks section is where you organize links to your favorite screens for easy access. Every user's bookmarks are different, and many people are able to keep an eye on their organization's performance by just clicking through their bookmarks every week.



Adding a Bookmark

To create a bookmark, click on the star icon. In this example, we're looking at a dashboard in the Dashboards section.



We now see that dashboard in the Bookmarks section.



Editing Bookmarks

You can rename, reorder, or remove a bookmark by clicking on the Edit tab in the bookmarks section.



Importing Data

Simple Value Imports (KPIs and Initiatives)

Overview

This article covers how to create a new KPI or Initiative value import, as well as how to import data that is already in a specific format. Please see the <u>Advanced</u> <u>Value Imports (KPIs and Initiatives)</u> article for how to import data in more advanced formats.

Starting a new Import

You can import KPI and Initiative values directly inside of Spider Impact. Anywhere you manually update data, there is the ability to import data as well. For example, on every tab in the Scorecards section there's an import menu with a KPI values option



The Initiatives section has a similar button for importing initiative status.



There's even an import button when updating KPI values in the Home section.

PERSONAL	Home				
री Home 💿	Welcome	KPI UPDATES 🔻 🍸			▲ June 2020 ▼ 〈 >
☆ Bookmarks	Alerts 5	KPI	PERIOD	ACTUAL	Import KPI Values
PRESENTATION	KPI Updates	FINANCIAL			
 Strategy Maps Dashboards 	My KPIs	Product Revenue	June 2020	622,250 \$	450,000 \$ 465,000 \$
Charts & Reports	My Tasks	Book Revenue	June 2020	39,100 \$	35,000 \$ 40,000 \$ 🗩
Briefings FOUNDATION		Product Costs	June 2020	274,531 \$	275,834 \$ 275,000 \$ 🖃
ScorecardsInitiatives		Training Venue Costs	June 2020	39,639 \$	39,584 \$ 38,750 \$ 🚍
🖒 Files		Book Production Costs	June 2020	8,545 \$	8,334 \$ 7,500 \$
		Total Gross Profit	June 2020	436,627 \$	422,250 \$ 432,917 \$

Simple Imports

When importing KPI and Initiative values, the default option is Simple Import.



Simple import is by far the easiest option and is great when you have data that's already in a supported format. Your spreadsheet can have dates in either the header row or in a column, and there are example files that you can download to show you exactly what the app is looking for.

Q Find	Overview Measures		Edit	Au
+ New Scorecard It	Measure Values			
Mobileworld Balanced Sco	Choose a format (optional)			
 Financial Customer Internal Processes Organizational Capacit; 	Dates in the Header Row Easier to update Dates in a Column Includes thresholds			
	You can upload an Excel or CSV file to update your KPI values. The "Dates in the Header Row" format is easier to update, but doesn't allow updating threshold values.	Jan 2020 :	Feb Mar 2020 2020	Apr M. 2020 20
	 The id column is required You may include other columns but they will be ignored Columns may be in any order Dates in the header row should be in the M/d/yy date format. For example, 	RELA	Financial C	verviev
	December 31st, 2020 would be 12/31/20. Administrators can change this.	ш	Monthly St MOBILEWOR	aff Meet
	Select a file Browse Cancel Back Q-2 Run Import			

Finally, Spider Impact can easily export your existing KPI data in exactly this format so you can import it to another organization, or modify your data to be reimported. This is covered in the <u>Exporting KPI Value Import File</u> article.

With just a couple clicks you can import data and be on your way.

🛱 Mobileworld In	с.	S Total Reven	ue) ×	- ▲ - I	-	0
	Q Find	KPI Values			E	dit Jun	e 2020 👻	<>
	+ New Score	Choose a format (optional)		CE				0
	 Mobileworld Balanc Financial Increase Revi 	Dates in the Header Row Easier to update	Dates in a Column Includes thresholds					
Charts & Reports Briefings FOUNDATION	ළු Base Funi ඒ MIPRs				-0	0-0-0-	0-0-0	•
 Scorecards Initiatives 	UFRsTotal Revi	You can upload an Excel or CSV file to upo Header Row" format is easier to update, values.	late your KPI values. The "Dates in but doesn't allow updating thresho	the old				
Files	Improve Prol Ø Net Opera Ø % Net Op	 The id column is required You may include other columns but the Columns may be in any order Dates in the header row should be in th 	y will be ignored e M/d/yy date format. For example,	201	t De 19 20	ec Feb 19 2020	Apr 2020	Jun 2020
	 Reduce Sales Sales & G 	December 31st, 2020 would be 12/31/20 Download Example	December 31st, 2020 would be 12/31/20. Administrators can change this.					
	Customer Improve Cust	Select a file		Browse				
०.¢ ∢	E Collapse All	Cancel Back	Show	Notes (1)				

Advanced Value Imports (KPIs and Initiatives)

Overview

This article covers all of the advanced functionality for importing KPI and Initiative values. For information about how to start an import, or how to easily import values that are already in a specific format, please see the <u>Simple Value Imports</u> (<u>KPIs and Initiatives</u>) article.

Data Source

The first step when importing KPI or Initiative values is to choose what type of import you want. When you want more powerful data import options, choose Advanced Import. This turns your value import into a 9-step wizard with full export, transform, and load (ETL) capabilities.



The first thing you'll need to do is choose a data source. For example, you can choose Database...

all Testal		Şasok	
¢ Boo	Add Import		
🗿 Tota	Choose A Data Source		0-0-0-
Improvi	Spreadsheet	Database	tct Dec
⊘ Net			
0°% N			
Reduce			AL
			isk
Customer			
Improvi	Cancel Back 📿 📿	3 4 5 6 7 8 Next	
& Custor	mar Satiefaction C		

... and write a SQL query.

Increase		
6º Proc	Database Connection	
& Train		
& Boo	Use an existing Import Connection, or set up a new one.	
🗿 Tota	Database Connection	0~0 ^{~0}
Improve	HP System	oct De
& Net	The System	
& % N	SQL Query	6
Reduce	select * from personnel where userid > 150	ML
& Sale		SSK
Lustomer		
Improve		
& Cust	Cancel Back	
Improve	Customer Retentio	

Or you can choose Spreadsheet...

& Traini		John L	
¢ Boo	Add Import		
🗿 Tota	Choose A Data Source		0-0
Improv	Spreadsheet	Database	oct
P Net			
Reduce			6
¢ Sale			ISK.
stomer			
Improv	Cancel Back \checkmark 2 3	4 5 6 7 8 Next	
& Custor	mer Satisfaction S		

... pick one of several ways to get the spreadsheet into Spider Impact...



... and then do any last-minute cleanup. In this example we're importing from an Excel spreadsheet, so we can choose a worksheet on top. Many spreadsheets have

header data that you don't want to import in the first few rows, for example column labels or a spreadsheet title. If one of these rows contains your column labels, be sure to flip the switch on that row. You can also use the Ignore checkboxes to hide irrelevant data.

PERSONAL	Administr	ration								0.0	
요 Home 🚥	PERSONAL My Profile	Select W	orkshee	t and Header Row	ministrator					C Clea	M
PRESENTATION	My Alerts	This step header ro	allows you t ow will be ig	to choose what to import. Select the header nored.	row for your data	, if there is one. A	ll rows above the	selected	+ N	ew Impe	ort
 Dashboards Charts & Reports 	Users Groups & P	Worksheet scoreboard	L_Values					.	0	6 1	3
FOUNDATION	d Broad	EXAMPLE	DATA FROM	THE SPREADSHEET					0	6 1	3
ScorecardsInitiatives	Shared Data	HEADER ROW	IGNORE	A Metric	B Value	C Threshold 1	D Threshold 1	E Date	+ *	ew Impo	ort
DatasetsFiles	Scheduled			test_metric_1 (2 Color)	15,491	15,491	15,491	Oct 3, 2016		0 1	3
	Import Cor			test_metric_2 (4 Color Scored Middle) test_metric_3 (4 Color Orange)	3,181,124.4	3,181,124.4	3,181,124.4	May 18, 2019 Jul 7, 2017	•	0 1	
	Calendars			test_metric_4 (Unscored)	1	1	1	Mar 26, 2019 Nov 13, 2017	1	0.3	Ł
	Application			test_metric_6 (2 Color Stabilize)	0	0	0	Dec 4, 2017			
	Server Adn Spider Imp			test_metric_7 (2 Color Stabilize)	6,087.1	6,087.1	6,087.1	Apr 28, 2016			
	License Ma	Show All Roy Cancel	vs (May take Back	several minutes)	4 5 6	7 8	9	Next			
Q 🔅 🔺	Polis an e stil a			4							

Transforming Data

Next is the optional transformation stage. If you want to import your data as-is, just click next. If you want to change your data before it's imported, however, click Add Transformation. This is covered more in-depth in the <u>Transforming Values</u> <u>While Importing</u> article.

	De	c Jar
If you want, you can change the data as it comes in. For exa transformations to:	mple, you could create	
Change all negative metric values to blank values		
 Ignore rows where no metric value is specified Change threshold values from 5 to 500 		
TRANSFORMATIONS	+ Add Transformation	
Your source data will be used as-is without	any transformations.	
Your source data will be used as-is without	any transformations.	

Identifying Fields in Import Data

At this point, it doesn't matter where your data is coming from, it all looks the same. Now you'll need to tell the software where to find the data you want to import. To do this, just drag and drop the column labels onto the top of each column. If your columns are named something that Spider Impact recognizes, we'll do this for you automatically.

🛱 Mobileworld Inc.	<	Total Revenue			0 *	A- b- cb - 0
	Source Data					June 2020 👻 < >
요 Home 61	Date Reference					
A Bookmarks	Dates are in a column 🔹			 Overwrit 	e Existing Values	0
RESENTATION						
Dashboards	Your source data is below. In this step, y	you'll need to tell us which co	lumns have the data	you want to import	. We've done	
Charts & Reports	Please see our Importing KPI a d Initia	s, but you may need to drag a tive Values support article for	nd drop some of the r advanced tips and t	ricks.	places.	
D Briefings						00000
OUNDATION	Available Column Labels					
Scorecards	KPI Id/Name (2) = Three	shold = Note =				
✓ Initiatives	• KPI Id/Name (1) =	Drag & Drop Labels Here	Threshold =	Threshold =	• Date =	
🕒 Files	;)	;;			Feb Apr Jun 2020 2020 2020
	Metric	Value	Threshold 1	Threshold 1	Date	
	test_metric_1 (2 Color)	15.5K	15.5K	15.5K	Oct 3, 2016	ATED ITEMS + Add
	test_metric_2 (4 Color Scored Middle)	3.18M	3.18M	3.18M	May 18, 2019	
	test_metric_3 (4 Color Orange)	18.6K	18.6K	18.6K	Jul 7, 2017	No related items
	test_metric_4 (Unscored)	1	1	1	Mar 26, 2019	
	test_metric_5 (2 Color)	114K	114K	114K	Nov 13, 2017	
	test_metric_6 (2 Color Stabilize)	0	0	0	Dec 4, 2017	
	test metric 7 (2 Color Stabilize)	6.087	6.087	6,087	Apr 28, 2016	
Q. 🕸 🔺 🚈 G	Cancel Back	• • • • •	0-0	8 9	Next	

One of the things you'll need to tell the software is where to find the dates for the values. In this example we've chosen "dates are in a column" and we've matched the Date label with the date column.

🛱 Mobileworld Inc.	< Tot	al Revenu	Je		0 *	A - D - O - - O -					
	Source Data					June 2020 👻 < >					
A Beckmarks	Date Reference										
T Bookmanks	Dates are in a column 👻	v									
PRESENTATION PRESENTATION PRESENTATION PROUNDATION PROVINCE PR	Your source data is below. In this step, you'll need to tell us which columns have the data you want to import. We've done our best to identify the correct columns, but you may need to drag and drop some of the labels into the right places. Please see our Importing KPI and Initiative Values support article for advanced tips and tricks. Available Column Labels KPI Id/Name (2) = Value = Threshold = Note =										
✓ Initiatives		Nelue -	Threehold =	Thursdald 3							
D Files	• KPI Id/Name (1)	value		Inresnota	• Date =	Feb Apr Jun					
	Metric	Value	Threshold 1	Threshold 1	Date						
	test_metric_1 (2 Color)	15.5K	15.5K	15.5K	Oct 3, 2016	LATED ITEMS + Add					
	test_metric_2 (4 Color Scored Middle)	3.18M	3.18M	3.18M	May 18, 2019						
	test_metric_3 (4 Color Orange)	18.6K	18.6K	18.6K	Jul 7, 2017	No related items					
	test metric 4 (Unscored)	1	1	1	Mar 26. 2019						

You can also choose a specific date for all of the values you're importing.

Source Data								
Date Reference Use a specific da	te	7/2	14/2þ2	20		21		✓ Overwrite Existing Values
Your source d	<	July			- 2	020 -		ch columns have the data you want to import. We've
done our bes	Su	Мо	Tu	We	Th	Fr	Sa	d to drag and drop some of the labels into the right
places. Pleas	28	29	30	01	02	03	04	ort article for advanced this and tricks.
	05	06	07	08	09	10	11	
Available Col	12	13	14	15	16	17	18	
KPI Id/Name	19	20	21	22	23	24	25	
• KPI Id/Nam	26	27	28	29	30	31	01	eshold = Threshold = Drag & Drop Labels Here
				'	· · · · · · · ·		·	

You can even choose a relative period. In this example we're importing KPI values into the current period.

ta inc.) lotal k	evenue 🛛 🖉 ★	A - E-
٩	Source Data	•		June 2
	Date Reference			
[1]	Use a relative period 👻	Current Period 🔻	✓ Overwrite Existing Values	
		Current Period 🗸		
rts	Your source data is below. done our best to identify t	1 Period Earlier	us which columns have the data you want to import. We've ou may need to drag and drop some of the labels into the right	
~~	places. Please see our Imp	2 Periods Earlier	/alues support article for advanced tips and tricks.	
				0-0-0
	Available Column Labels			
	KPI Id/Name (2) 🚊 Valu	e ∃ Threshold ∃	Note	

Finally, for KPI values you can choose "dates are in a header row." This allows you to import multiple values for each KPI row.

Ô Mơ	obileworld Inc.		C Total Pov	00010			2
PERSC	Source Data						
<u>۶</u> ۱	Date Reference	1					
ζz E	Dates are in a header row	-				Overwrite Existing V	/alues
RESI							
5 C	Your source data is belo	w. In this step, you'll need to	tell us which columns have the	he data you want to import. W	/e've done our best to identify	the correct columns, but you	
30	may need to trag and to	nop some of the tabets into th	ie fight places. Flease see ou		values support article for adv	anceu ups anu tricks.	
D E	Available Column Labe	els					
DUNI	KPI Id/Name (2) 📃						
:: s							
2 I	• KPI Id/Name (1) =	Drag & Drop Labels Here	Drag & Drop Labels Here	Drag & Drop Labels Here	Drag & Drop Labels Here	Drag & Drop Labels Here	Drag
ÐF	Metric	May 20, 2016	Feb 21, 2018	Nov 27, 2015	Sep 3, 2018	May 9, 2018	Apr 1
	test_metric_1 (2 Color)	14.6K	11.2K	13.5K	6,694	13.2K	16.6
	test_metric_2 (4 Color Scored Middle)	3.31M	1.79M	1.86M	1.9M	3.64M	3.7M
	test_metric_3 (4 Color	25 OK	1A 2K	5 306	27 2K	Q 12Q	19.5k

Identifying Destination KPIs

After you've chosen what data you want to import, the next step is choosing where you want that data to go. Just choose the items you want to import data into, or choose an item higher in the tree to select every KPI or Initiative below it.

Ô	Mobileworld Inc. Control Total Reve	nue 0 * A · B · M · O
	Destination KPIs	
자 PRESI	On this step, choose the KPIs that you want to import data into. You can add individu add all of the KPIs underneath them.	al KPIs to the list, or you can select scorecard items higher in the tree to automatically
е П	UNIQUE KPIS IN IMPORT DESTINATION KPIS 181 KPIs 27 KPIs (154 missing) O Edit 27 KPIs	
FOUN	Select KPIs	
	Q Find	Q Find
	Mobileworld Inc.	Key Performance Measures
	Key Measures	> Sales Pipeline
	Financial	> Customer Satisfaction
	Marketing	> Product Delivery and Effectiveness
	Customer Support	> User and Influencer Engagement
	Sales	
	Operations	
	Information Technology	
	Ϋ́Ξ Expand All	* स Expand All
	Cancel Back	
Q	♦ Edit Edit	2 YEARS AGO

To see the items that you've already selected, just click the Edit KPIs button.

ŵ	Mobileworld Inc. <	Total Revenue	0 * 4 * 6 * 6
	Destination KPIs		
	On this step, choose the KPIs that you want to import data into add all of the KPIs underneath them.	o. You can add individual KPIs to me list, or you can selec	ct scorecard items higher in the tree to automatically
	UNIQUE KPIS IN IMPORT DESTINATION KPIS 181 KPIs 27 KPIs (154 missing)	Edit 27 KPIs	
FOUN	Select KPIs	Q Find	
	Mobileworld Inc.	Key Performance Measur	res Add
	Key Measures Financial	Sales Pipeline Customer Satisfactio	n

This will open a second-level dialog where you can view and remove the KPIs that you've selected to import data into.

🛱 Mobilew	vorld Inc.	_	To	tal Payanua			0 * <u>A</u> - <u>b</u> -	0-0
PERSONAL	Destination KPIs	Select H	(PIs					• • •
Bookmark	On this step, choose the KPIs the add all of the KPIs underneath	These a the list	re the KPIs that you by clicking on its re	u've chosen to import move button on the rig	data into. You can remov ght.	e a KPI from	In the tree to automatically	0
 Dashboard Charts & R 	UNIQUE KPIS IN IMPORT D 181 KPIS 2	UNIQUE 181 KP	KPIS IN IMPORT	DESTINATION KPIS 27 KPIs (154 missi	ng)			
Briefings	Select KPIs	KPIS TO	MAP DATA TO		ť	Remove All		0-0
FOUNDATION	Q. Find	ID	KPI NAME		ORGANIZATION			
E Scorecards	Mobileworld Inc.	1096	Total Revenue		Mobileworld Inc.	Û	Add	
 Initiatives 	Key Measures	1099	SEO Project Spe	nd to Date	Mobileworld Inc.	đ		
D Files	Financial	935	Base Funding		Financial	Ē		Jun 2020
	Marketing	936	MIPRs		Financial	1		
	Customer Support	937	UFRs		Financial	۵		+ Add
	Sales	940	Production Cost	S	Financial	đ		
	Operations	941	Training Venue (Costs	Financial	Û		
	 Information Technology 	942	Book Production	n Costs	Financial	Û		
		943	Total Costs		Financial	t		
	Cancel Back	1590	fdfhdfh		Financial	俞	Next	
						Close		
Q 🕸		/ Edit			S	how Notes (1) 🔨		

Mapping Import Data to Destination KPIs

Now it's time to match the import data with the destination items. We'll do our best to automatically choose a matching based on name.

🛱 Test				()	0-101-11	<u>A</u> -	b = 6	- 0
	Q	Марріі	ng				lune 2020 🔻	
	EI R	Now it autom	's time to match y aatically match the	our source data with the destination KPIs th m, but be sure to double-check to make sur	at you've selected. We've done our best to e we got it right.			
	c	ID	ORGANIZATION	SCORECARD ITEM	IMPORT			٥
	c	1891	Test	test_metric_1 (2 Color)	test_metric_1 (2 Color)	•		
	c	1892	Test	test_metric_2 (4 Color Scored Middle)	test_metric_2 (4 Color Scored Middle)	•		
E Scorecards	c c	1893	Test	test_metric_3 (4 Color Orange)	test_metric_3 (4 Color Orange)	-		
 Files 		1894	Test	test_metric_4 (Unscored)	test_metric_4 (Unscored)	-		
		1895	Test	test_metric_5 (2 Color)	test_metric_5 (2 Color)	Feb 2020	Apr 2020	Jun 2020
		1896	Test	test_metric_6 (2 Color Stabilize)	test_metric_6 (2 Color Stabilize)			/
		1.898	Test	test metric 7/2 Color Stabilize)	test metric 7 (2 Color Stabilize)		TARGET 0	О
Q.¢ . ∢	*3 L.	Cancel	Back	0 0 0 0 0		ext		

Saving and Scheduling

Your value import is now ready to run.

O test_m	netric 1 (2 Color)	
O test_	Save and Schedule Import	
⊙ test_		
⊙ test_	If you want, you can save this import so that you'll be able to quickly run it agailater with new data. You can also schedule it to run regularly.	
🖸 test_		
⊙ test_	Save Import	
▲ test_	Cancel Back 🗢 🗢 🗢 🗢 🗢 🗢 🐨 Back Run Import	Feb 2020

If you want, you can also save your import so you can quickly run it again later with new data. By assigning other users and groups as owners, you can share this import with other people.

🛱 Test	test_metric_6 (2 Color Stabilize)	∆- b- 6	- 0
	Save and Schedule Import	June 2020 👻	
	If you want, you can save this import so that you'll be able to quickly run it again later with new data. You can also schedule it to run regularly.		
	Save Import		0
Briefings FOUNDATION	Personnel data from HR system		
Scorecards Initiative	OWNERS		
D Files	Start Typing		
	Nora James	Feb Apr 2020 2020	Jun 2020
	CHOOSE A TIME TO SCHEDULE	TARGET	HIGH
	Schedule Import	0	0
	Cancel Back 🗨 🗢 🗢 🗢 🗢 🗢 😏 Save Save and Run		+ Add
Q. 🕸 🖌 🛶	Expand All Fedit		

You can even schedule the import to run on a recurring basis. In this example we're going to import a new version of the data every Sunday night.

🛱 Test	¢	test_metric_6 (2 Color Stabilize)	0 *	∆ - B-	- 6	- 0
PERSONAL Q	Save and Schedule Import			June	2020 -	< >
Bookmarks	If you want, you can save this import s	so that you'll be able to quickly run it again later with new data. You can als	60			
Dashboards						0
🕒 Charts & Reports	Save Import					
Briefings	Import Name					
FOUNDATION	Personnel data from HR system					
E Scorecards	OWNERS					
✓ Initiatives						
D Files	Start Typing					
	Nora James		1	Feb 2020	Apr 2020	Jun 2020
	Brandon Sampson		đ			
						/
	CHOOSE A TIME TO SCHEDULE			TA	RGET	HIGH
	Schedule Import				0	0
	EVERY	ON				+ 444
	WEEK	- SUNDAY -				T You
	L→ AT					
	2 • 00 • AM	▼ (UTC-04:00) AMERICA/NEW_YORK (THE SAME AS YOUR TIME ZONE)	•			
	Cancel Back 🗸 🗸	Save Save	e and Run			
Q 🔅 🕡 🔫	Expand All 🥜 Edit 🖪	Show Notes (0)				

Transforming Values While Importing

Overview

Many types of imports have an optional step to transform your data. This is useful for things like cleaning your data or for skipping over data you don't want to import. In the example below, we're importing KPI values, but transformations work the same regardless of what kind of data you're importing.

Adding Transformations

The transformation step of all imports is optional, so if you want to import your data as-is, just click next. If you want to change your data before it's imported, however, click Add Transformation.

ransform the data						
If you want, you can change the data as it comes in. For example, you could create transformations to: Change all negative metric values to blank values Ignore rows where no metric value is specified Change threshold values from 5 to 500						
TRANSFORMATIONS Your source data will be used as-is without an	+ Add Transformation					
Your source data will be used as-is without ar	ny transformations.					

This opens the add transformation menu where you can apply any combination of dozens of types of transformations to your data.

				•••••					
	O Tot	Add Transformatio	on						
	Improv				Oct	Dec	Feb	Apr	Jun
	ଟି Nei ଟି% I ● Reduc	OAL	RE	LATED IT	EMS +	Add			
	🔗 Sal				765K		No rela		
	▲ Customer	IF	FILTER TYPE						
	Improv	Value 👻	is blank 👻						
	i Cui	L→ THEN TRANSFORM	is blank 🗸						
		by making the KPI valu	not blank						
	Cur	→ Add THEN	is any						
	. Imara		is not any						
	• Improv	Here are a few examples	NUMBERS	ere are more records					
	Ø ² Gol O SEI	that will be transformed	number less than						
			number less than or equals						
	▲ Internal P	EXAMPLE DATA TRANSFO	number greater than						
	Improv	Т	number greater than or equals						
	d⁰ Sal		between numbers						
	Improv	Cancel	TEXT	Done					
		Jaigh e-Maits Sent							

For example, you can create a filter to set the KPI value to N/A if the value column is less than 1.

 _									0-0	0-0-0	0-0-0	0-0
Å	Add Transformatio	on										
<i>°</i>								- 10				
O	We automatically ignore	a blank valı	les in your imp	ort data lfv	ou want	to remov	ve an existing					
im) چ چ	KPI value, you'll need to information on this and support article.	o choose the all of the o	e "by importing ther transforma	a blank val	lue" trans	sformati r <u>data tra</u>	on. For more ansformation	10	Dec 2019	Feb 2020	Apr 2020	Jun 2020
	IF	FILTER TYPI		NUMBER					RE	LATED IT	ems 🕂	- Add
e Rei	Value -	number	less than 👻	1						No rela		
	→ THEN TRANSFORM							ĸ				
Custor	by making the KPI valu	ue N/A 👻										
0	Add THEN											
e inj	Here are a few example: will be transformed.	s of how tra	nsformations v	vill show up	. There a	re more	records that					
e im												
P	EXAMPLE DATA TRANSFO	RMATION										
O	A		В		С	D	E					
🛦 Interna	test_metric_4 (Unscored)	1	0.985 to: I	N/A	1	1	Mar 26, 2019					
● Imj &	test_metric_6 (2 Color Sta	abilize)	0.011774	to: N/A	0	0	Dec 4, 2017					
● Imj	test_metric_10 (Goal Only	y)	0.3721 to:	N/A	0.4	0.4	Oct 23, 2018					
Ø												
⊘ ● Impro-	Cancel						Done					

Here we're adding "My" to the beginning of every KPI name.

UTION	or pairies	\$400	DK	and the second second	an a			
corecards	Add Transformation							
nitiatives								
iles	We automatically ignore blank values in your import data. If you want to remove an existing KPI value, you'll need to choose the "by importing a blank value" transformation. For more information on this and all of the other transformations, please see our <u>data</u> transformation support article.							
	IF					ems +	Add	
	All Records -					ated item	15	
	└→ THEN TRANSFORM ACTION PREFIX							
	Metric by prepending My							
	L Add THEN							
	Here are a few examples of how transformations will show up. There are more records that will be transformed.							
	EXAMPLE DATA TRANSFORMATION							
	A	В	с	D	E			
	test_metric_1 (2 Color) to: My test_metric_1 (2 Color)	15.5K	15.5K	15.5K	Oct 3, 2016			
	test_metric_2 (4 Color Scored Middle)	3.18M	3.18M	3.18M	May 18, 2019			
	test_metric_3 (4 Color Orange) to: My test_metric_3 (4 Color Orange)	18.6K	18.6K	18.6K	Jul 7, 2017			
	Cancel				Done			
		_		_				

You can even use transformations to do data cleanup, like removing all nonnumbers from the Value column.

 ₽ ■ Ri 	IF All Records		
Ø	→ THEN TRANSFORM ACTION	CHARACTER TYPE	
Custo	Value - by removing	non-numbers 👻	
• In		letters	
Ø		non-letters	
• In	Here are a few examples of how transformations will s	non-numbers 🗸	ecords that will be
Ð	tansionned.	numbers	
• In	EXAMPLE DATA TRANSFORMATION	spaces	

Regular Expression Filter

+ New Sc	orecard Item	
ileworld Ba	Add Transformation	
inancial		
ustomer	We automatically ignore blank values in your in yort data. If you want to remove an existing measure value, you'll need to choose the "by importing" blank value" transformation.	
nternal Prov		0-0
Organizatior	IF FILTER TYPE TEXT	
	Metric • matches regular expression • b[aeiou]bble	
	→ THEN TRANSFORM ACTION NEW VALUE	
	Value • by making the value • 0	eb Mar
	L→ Add THEN	

The "matches regular expression" filter is incredibly powerful, but it's also very technical. Regular expressions are used in software development and some advanced software applications to match text. In this example, the regular expression *b[aeiou]bble* will match the following words:

- babble
- bebble
- bibble
- bobble
- bubble

There are resources across the web to help you learn how to make a regular expression to match the text you want. We've also found that <u>RegExr</u> is an online tool that works well for building the perfect regular expression.

Importing Scorecard Items

Users who have permission to modify scorecard structure can now import scorecard items from a spreadsheet directly inside of Spider Impact. To start, just click on the "Import Scorecard Items button on any tab in the Scorecards section.



Or, if your organization doesn't have a scorecard yet, you can click on the "Import Scorecard Items" button in the navigation pane.


This opens a dialog where you can upload your spreadsheet. You can also download an example file showing what your spreadsheet can look like.

	Import Scorecard Items			
os horts This Organization has no Scorecard. Click on a button below to create one.	 You can import scorecard items using data from an spreadsheet, Google Sheets, or a CSV file. Your file should have the same format as the exart You can import either a full or partial scorecard. Dates should be in the M/d/yy date format. For exa December 31st, 2020 would be 12/31/20. Administic can change this. If you specify more than one tag for a scorecard it should be pipe delimited. For example, East Coast[Sales]High Priority If you specify Units for a KPI, it should match one following: Kilograms, Miles, Hours, Minutes 	n Excel mple file. tample, strators tem, tags of the	2 ion has no	
Import Scorecard Items	Choose A Source			
	Select A File	Browse		
	Cancel 1 — 2	Next		

Finally, Spider Impact can easily export existing scorecard items in exactly this format so you can import it to another organization, or modify your data to be reimported. This is covered in the <u>Exporting Scorecard Import File</u> article.

If your columns have the same names as their corresponding scorecard item fields, the software will automated add the correct labels. Otherwise, you'll need to drag and drop the column labels to correctly match the columns.

This ste	allows vou to choo	ose what to import. The ignore	checkboxes allow you to skip	rows that vou dor	n't want to import, such as roy	ws containing column	headings.	
orksheet	d Structure	•						
scoreboar	u_structure							
MAP YOU	R RESULTS	\						
Key Pe	formance Area 📃	Objective = Generic =	KPI Units = Tags =	Threshold =				
IGNORE	Scorecard =	Key Performance Area	Drag & Drop Labels Here	Generic Ξ	Drag & Drop Labels Here	Description =	Start date =	Archive date
	Scorecard	Perspective	Tom		Metric		Start Date	Archive Date
	Root				test_metric_1 (2 Color)	description for metric 1		
					test_metric_2 (4 Color Scored Middle)	description for metric 2		
					test_metric_3 (4 Color Orange)	description for metric 3		
					test_metric_4 (Unscored)	description for metric 4		
					test_metric_5 (2 Color)	description for metric 5		
					test_metric_6 (2 Color Stabilize)	description for metric 6		
		test_perspective 7			test_metric_7 (2 Color Stabilize)	description for metric 7		
				test_generic 8				
	Mautaka asure	(minuton)						

You can import an entire scorecard, or you can import just a few scorecard items at a time. In this example the "improve customer satisfaction" objective is selected when we click the "import scorecard items" button, so everything we import will be created underneath that.

c. <	Improve Customer Satisfaction	
Q Find	Overview KPIs 9	Edit June 2020 / < >
+ New Scorecard Item	This is where you edit and create scorecard items one at a t	me. If you want to edit many at once, use the Report Writer to
Mobileworld Scorecard	filter for items to edit, then click the Mass Edit button. For e organization, where you can change anything, including ite	xample, <u>this report</u> shows all scorecard items in thi
▲ Financial •		
▲ Customer •	Name	Type
Improve Customer Satisfaction	Improve Customer Satisfaction	Objective
 	Description	Wainka
Improve Customer Retention	Description	
Improve Market Awareness	Improve customer satisfaction across both products and training	33.3%
▲ Internal Processes •		Advanced Options
▲ Organizational Capacity •		

Managing Imports and Connections

Managing Imports

The Admin > Imports screen is where users can go to manage their saved imports. Everything is organized by import type, and you can create a new import by clicking on the New Import button for that type.

ম	DATA IMPORT & EXPORT					
숬	Shared Dashboards and Strategy Maps	FILTER SUCCESS		-	× C	lear
:)	Scheduled Exports	KPI VALUES		+ 1	lew In	port
	Imports	Customer Returns	Expand	•		A
٩	Import Connections	O'Reilly, Scott	слрани		63	
Ш П	CONFIGURATION	Holiday party demo Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale	Expand	0	6	đ
	Calendars	🖪 HR System Import	Evpand			A
	Dataset Rollup Trees	Administrator, Scoreboard	схрани	U	63	
Ľ	Application Administration	Inventory Montgomery, Janet, O'Reilly, Scott, Peterson, Dale	Expand	D	6	đ
	Server Administration	- Weekly stats undate				
	Spider Impact Databases	Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale, Sampson, Brandon	Expand	0	6	û
	License Management				low In	nort
Q	MONITORING		7	<u> </u>	ich III	ipore
*	٩	There are no scheduled Initiative Status imports				

Users who are in a group with the "Manage all Imports" or "Application Administration" permission are able to see and edit all imports. Otherwise, they can see and edit imports that they (or a group that they're in) own.

You can apply a filter at the top of the page to change which imports are showing. You can filter based on things like owners, names, and whether the last import was successful. If there are more than 10 saved imports, this screen will automatically add a filter for only your imports to save time when you first view the screen.

FILTER Dale Peterson Include Results From Group Memberships		•	 C 	lear
KPI VALUES Image: Holiday party demo Demo Undaters (Communication Users), O'Beilly, Scott, Peterson, Dale	 Expand 	+	New In	nport
 Inventory Montgomery, Janet, O'Reilly, Scott, Peterson, Dale 	✓ Expand	0	6	ŧ
Weekly stats update Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale, Sampson, Brandon	✓ Expand	C	6	٦

Clicking on one of the imports will expand the row to show the import details. You can see the results of the last import, edit the import details, or change its schedule.

FILTER Dale Peterson		👻 🗶 Clear
Include Results From Group Memberships		
KPI VALUES		+ New Impor
Holiday party demo Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale	^	Collapse D 🏠 💼
DATA SOURCE INFO Image: Transformations MAPPINGS Imp 2 - advanced.xlsx 2 23 Not RESULTS 0 Details Imp	PORT SCHEDULE 🖍	LAST RUN Dec 6, 2019 4:06 PM
Inventory Montgomery, Janet, O'Reilly, Scott, Peterson, Dale	~	Expand D 🏠 🏛
B Weekly stats update		Expand

Import Connections

The Admin > Import Connections screen is where you go to manage all of the data sources that Imports use. Users with the "Application Administration" permission can see all imports. Otherwise, you can only see the imports to which you have been assigned an owner.



Scorecards

Overview of Scorecards

The Scorecard Tree

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



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



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

Overview Tab

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

<	Book Revenue		0 * A· B· A· 0
Q Find	Overview KPIs		Edit Quarter 3, 2020 👻 < >
+ New Scorecard Item	PERFORMANCE	HISTORICAL PERFORMANCE	•
Financial Profit and Loss			
Revenue	Ş111K +\$8,500	\$180K O	
Product Revenue		\$160K	
Training Revenue		\$140K	
Cost of Sale			
Gross Profit		\$120K	• •
 Operating Expenses 	\$105K 4.7 \$120K RED SCORE GOAL	\$100K Q3 Q4 Q1 Q2 Q3 Q4	Q1 Q2 Q3 Q4 Q1 Q2 Q3
 Net Operating Profit 		2017 2017 2018 2018 2018 2018	2019 2019 2019 2019 2020 2020 2020
	ACTUAL AND THRESHOLD VALUES		RELATED ITEMS 4 + Add
	· · · ·	SCORE ACTUAL RED GOA	Develop a web marke
	• July 2020	7.3 \$41K \$35K \$40	MOBILEWORLD INC.
	• August 2020	4 \$36K \$35K \$40	K
	• September 2020	2.7 \$34K \$35K \$40	K
*5 Excend All → Edit 4	+ Add Note Add Note A FEW SECONDS AC	ms to be d. Let's e in place	

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

KPIs (or Measures) Tab

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



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



Financial				0	* 4	▼ Ŀ ▼ (6 - C
Overview KPIs					Edit	April 2021	• < >
KPIS						🔅 Disp	ay Options
крі	DEC 2020	TOTAL 2020	JAN 2021	FEB 2021	MAR 2021	APR 2021	TOTAL 2021
Product Revenue	\$437K	\$12.5M	\$442K	\$444K	\$444K	\$441K	\$4M
Training Revenue	\$216K	\$3.34M	\$222K	\$224K	\$226K	\$229K	\$2.09M
Book Revenue	\$13.3K	\$369K	\$16.9K	\$17.8K	\$20.2K	\$23.6K	\$219K
Total Revenue	\$667K	\$16.2M	\$681K	\$686K	\$690K	\$693K	2021 \$218,700
Net Operating Profit (before tax)	\$90.5K	\$983K	\$77.2K	\$80K	\$85.9K	\$81K	\$735K
% Net Operating Profit	11.8%	11.3%	10.8%	11.4%	11.4%	10.8%	10.2%
Sales & General Admin	\$37.7K	\$459K	\$36.2K	\$12.1K	\$15.8K	\$25.3K	\$109K

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.

🛱 Mobileworld, Iı	nc. <	Financial	
	Q Find	Overview KPIs	Edit August 2020 🗸 < >
산 Home ☆ Bookmarks	+ New Scorecard Item	This is where you edit and create scorecard items one at a time. If you want to edit many at on	× ce, use the apport Writer to filter for items
	Corporate Scorecard •	to edit, then click the Mass Edit button. For example, this report shows all scorecard items in the anything, including item names, aggregation type, or owners and updaters.	his organization, where you can change
Strategy Maps	▲ Financial •		
Dashboards	1	Name Type	
🕒 Charts & Reports		Financial Key Performance A	irea 👻
Briefings		Description Weight	
FOUNDATION	•	This is our Financial Perspective 100%	
E Scorecards			Advanced Options
✓ Initiatives			Advanced Options
🕒 Files			
		OWNERS	
		Add Owner	
۹ 🗘 🔹	♥금 Expand All ✔ Done	G→ Move D Copy 🕆 Delete	Cancel

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.

nc. <	Create Key Performance Area		
Q Find	overview KPIs	Edit	August 2020 👻 < >
+ New Scorecard Item	Name	Туре	
Corporate Scorecard •		Key Performance Area	•
▲ Financial •	Description		
New Key Performance Area	Type your description here	Advanced Opt	ions
	ownes		
	Add Owner		
* Ξ Expand All ✓ Done ◀			Cancel Create

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

Q Find Overview KPIs Edit August 2020 - < > Name Type Customer Description Type your description here Advanced Options OWNERS Add Owner	nc. 〈	Create Key Performance Area	
 New Scorecard Item Corporate Scorecard Financial Customer Description Type your description here Advanced Options 	Q Find	Overview KPIs	Edit August 2020 👻 < >
Customer Cus	+ New Scorecard Item	Name	уре
Customer Description Type your description here Advanced Options OWNERS Add Owner	 Corporate Scorecard Financial Enancial 	Customer	▲ Key Performance Area -
Add Owner	▲ Customer	OWNERS	Advanced Options
	Y≣ Evnand All → Dong d	Add Owner	Cancel Create

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

nc. <	Create Key Performance Area	₽ × ♠ ×
Q Find	Overview KPIs	Edit August 2020 👻 < >
+ New Scorecard Item	Name	Туре
Corporate Scorecard •		▲ Key Performance Area
▲ Financial •	Description	
Customer	Type your description here	Advanced Options
	OWNERS Add Owner	
་☴ Expand All ✓ Done ◀		Cancel Create

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.

ıc.	 Increase Revenue 	
Q Find	Overview KPIs ()	Edit August 2020 - < >
+ New Scorecard Item	Increase Revenue	Objective
Mobileworld Balanced Scorecard	Description	Weight
🔺 Financial	Increase revenue by 5% per annum	25%
Increase Revenue		
Product Revenue		Advanced Options
Training Revenue		
🔗 Book Revenue	OWNERS	
Total Revenue	Start Typing	
Improve Profitability	Sam Smith	÷
Reduce Sales Overhead Cos		
▲ Customer	Scott O'Reilly	Î
▲ Internal Processes		Notify Users/Groups of Assignment/Unassignment
र 🗧 Expand All 🛛 🖌 Done	 G→ Move G→ Copy Delete 	Cancel Save

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.

PERSONAL	Home				
ဂြိ Home 1	Welcome	💽 5 KPIs 💽 1 KP	ı 💽	4 KPIs	
숬 Bookmarks	Alerts 1				
PRESENTATION	KPI Updates	MY KPIS			
Strategy Maps	My KPIs	KPI NAME	PERIOD	SCORE	ACTUAL
Dashboards		CUSTOMER SUPPORT			
🕒 Charts & Reports	My Tasks	• <u>% Calls answered</u>	August 2020	1.9	92.9%
🛱 Briefings		• Average abandonment rate	August 2020	10	0.7%
FOUNDATION		• Average time to answer (seconds)	August 2020	8.3	2
E Scorecards		FINANCIAL			
✓ Initiatives		O Interest & Bank Charges	August 2020	10	\$4,807
🕒 Files		• Marketing & Advertising	August 2020	0	\$74.6K
		O National Insurance	August 2020	10	\$12.9K
		Office Rental	August 2020	0	\$58.8K
		• Pension Contribution (3%)	August 2020	10	\$0
		Sales & General Admin	August 2020	0	\$55.8K
		• Training Venue Costs	August 2020	3.4	\$39.6K
० ✿ ।	•				

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.

	Training Revenue	
Q Find	Overview KPIs	Edit August 2020 👻 < >
+ New Scorecard Item Financial Profit and Loss • Revenue •	This is where you edit and create scorecard items one at <u>Writer</u> to filter for items to edit, then click the Mass Edit this organization, where you can change anything, inclu	× a time. If you want to edit many at once, use the <u>Report</u> button. For example, <u>this report</u> shows all scorecard items in ding item names, aggregation type, or owners and updaters.
• Product Revenue	Name	Type
 Training Revenue 	Training Revenue	О КРІ
 Book Revenue 	Description	Waiaka
> 💽 Cost of Sale 🔹 🔹	Type your description here	33.3%
> 🖸 Gross Profit 🔹 🗧	Type your description nete	
> Operating Expenses		Advanced Options
> 🖸 Net Operating Profit 🛛 🔹		
	KPI DETAILS	
	Scoring Type 1 Calendar	2 Data Type 3
	Goal/Red Flag Monthly	← Currency ←
	Aggregation Type 4 Decimal Precis	sion 5 Currency 6
	T Sum VDefault	

- Scoring Type is how your KPI gets its score. The default Goal/Red Flag
 option is the most popular by far. You choose a number where your KPI turns
 green, and a number where your KPI value turns red. Please see our KPI
 Scoring Types article for more information.
- 2. **Calendar** is how often you update your KPI.
- 3. **Data Type** is the kind of number you want to use. You can choose *Number*, *Percentage*, or *Currency*.
- 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 <u>Application Administration</u> section.
- 6. **Currency** allows you to choose a specific country's currency and is only an option when configured in the <u>Application Administration</u> 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 <u>Application Administration</u> section.

Scoring Type	Calendar	Data Type	
Goal/Red Flag	- Monthly	- # Number	•
Aggregation Type	Decimal Precision	Units	
🖙 Average	✓ Default	davs	•

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:

Red Flag	Goal
• 🗹 Manual	• 🗹 Manual •
255,000	260,000
	Red Flag Manual 255,000

 Every series has an update type. It defaults to manual, but you can also choose Calculated or Template Rollup. Please see the <u>Calculated KPIs</u> article for more information. 2. Every manual threshold has a default threshold value. In this example our KPI will turn red if the value us lower than 255,000 and green if it's higher than 260,000. When higher values are worse, the Goal threshold is going to have a lower number than the Red Flag threshold.

KPI Updaters

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



Rearranging the Tree

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



Editing Multiple Scorecard Items at Once

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

Ô	Financial <	Total Costs	∂ A · A C
ম	Q Find	Overview KPIs	Edit February 2020 👻 < >
☆ •? ■	Hew Scorecard Item Financial Profit and Loss Revenue	This is where you edit and create scorecard items one at a time for items to edit, then click the Mass Edit button. For example, you can change anything, including item names, aggregation t	× e. If you want to edit many at once, use the <u>Report Writer</u> to filter <u>this report</u> shows all scorecard items in this organization, where type, or owners and updaters.
(*) []]	Cost of Sale Product Costs	Name	Туре
2 0	Training Venue Costs Training Venue Costs Book Production Costs Total Costs Total Costs	Description	Weight 25%
	Gross Profit Gross Profit Operating Expenses		Advanced Options
Q ✿ ▶	Net Operating Profit Expand All One	KPI DETAILS □ Copy □ Delete	Cancel Save

KPI Scoring Types

Overview

There are many different Scoring Types that you can choose for a KPI.

Scoring Type	Calendar	Data Type	
🖍 Goal/Red Flag 🗸 🗸	Monthly	- Currency	-
Unscored	Decimal Precision	Currency	
🔥 Yes/No	Default	▼ Default	•
🦺 Goal Only			
💦 2 Color			
🖍 Goal/Red Flag 🗸	Red Flag	Goal	
3 Color	Manual	- 🗹 Manual	•
🖍 4 Color Blue			
₄ Color Orange	39,584	\$ 38,750	
4 Color Scored Middle			
2 Color Stabiliza			

Every scoring type changes the things that you can configure for the KPI.

Goal/Red Flag

The default KPI scoring type is *Goal/Red Flag*, and it's the most popular option by far. You choose a number where your KPI turns green, and a number where your KPI value turns red.

SERIES		
Actual Value	Red Flag	Goal
🗹 Manual	🗹 Manual	Manual
	255,000	260,000

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.

The three colored segments of a Goal/Red Flag speedometer will always be the same size. The Goal is where the score is 6.6 and the Red Flag is where the score is 3.3. Your score will hit 10 at:

(goal - red flag) + goal.

This is better explained with an example. Let's say our goal is 700 and our red flag is 500. There's 200 between the goal and red flag. In Goal/Red Flag scoring, that means:

- Score is 0 when the actual value is 200 less than the Red Flag (300)
- Score is 10 when the actual value is 200 more than the Goal (900)



You actually need 4 thresholds to draw a speedometer with 3 colors. Goal/Red Flag scoring automatically calculates the highest and lowest thresholds for you, though. This way you only have to tell Spider Impact at what value your KPI turns green and at what value it turns red.



Unscored KPIs

Unscored KPIs are great for tracking things that don't make sense to score. Unscored KPIs have no thresholds, just an actual value.

Scoring Type	Calendar	Data Type	
Unscored	▼ Monthly	► # Number	
Aggregation Type	Decimal Precision	Units	
+ Sum	✓ Default	•	
ERIES			
Actual Value			
🕅 Manual	-		

This is what an unscored KPI looks like when visualized.



Yes/No Scoring

Yes/No KPIs track a yes or no value every period rather than a number. They don't have thresholds, but you do tell Spider Impact whether Yes is good or not.

Scoring Type	Calen	ndar	l	s Yes Good?	
🐥 Yes/No 🦰	- Mor	nthly	•	ம் Yes	-
Aggregation Type				1	
% Percentage Yes	•				
ERIES				•	
Actual Value					
F Î Manual	•				

This is what a Yes/No KPI looks like on a manual update form.

Product Revenue	August 2020	300,000 \$ 450,000	\$ 465,000 \$
Training Revenue	August 2020	Yes 👻	Ţ.
Book Revenue	August 2020	Yes 🗸	\$ 40,000 \$
		No	

Goal Only Scoring

Goal Only KPIs have a single threshold. If you hit your goal you're green. If you don't you're red. There's also a setting to tell Spider Impact whether higher values are better.

Scoring Type	Calendar	Are Higher Values Better?	
Goal Only	- Monthly	▾ ௴ Yes	-
Data Type	Aggregation Type	Decimal Precision	
			_
% Percentage	✓ Average	• 0 digits (example 8)	
% Percentage ERIES	Goal	• 0 digits (example 8)	•
% Percentage ERIES Actual Value Manual	Goal	• O digits (example 8)	

This is what Goal Only KPIs look like. Notice how the speedometer needle is always directly in the middle of its color segment.



Stabilize Scoring

Stabilize Scoring is great for when you don't want your KPI values to be too high or too low. They also have a very large number of thresholds.

Scoring Type	Calendar	Data Type	
💫 3 Color Stabilize	- Monthly	► # Number	
Aggregation Type	Decimal Precision	Units	
⊐ Average	✓ 0 digits (example 8)	•	
Actual Value	Low Worst	Low Red Flag	
SERIES			
Actual Value	Low Worst	Low Red Flag	
Manual			
	3	6	
Low Target	Best	High Target	
Low larger			
🗹 Manual	▼ Manual		
Manual	 Manual 8 	9	
7 High Red Flag	Manual B High Worst	9	
Image: Constraint of the second se	 ✓ Manual 8 High Worst ✓ Manual 	9 •	

This is what a Stabilize KPI looks like. Notice how not every color segment is not the same size because we typed in threshold values that aren't evenly spaced.



Every Other Scoring Type

Every other scoring type is similar. They're all just different variations of color selection, and some even include colors like blue or dark green. All you have to do is enter the color thresholds and Spider Impact will score your KPI.

A Color Orange Monthly aggregation Type Decimal Precision + Sum Default Default Default	Scoring Type	Calendar		Data Type	
ggregation Type Decimal Precision Currency + Sum Default Default Default ERIES Worst Red Flag I Manual I Manual I Manual I Manual /arning Goal Best I Manual I Manual I Manual I Manual	🖍 4 Color Orange	- Monthly	•	Currency	
+ Sum Default Pefault Default Ciment Default Worst Red Flag Manual Image: Manual 450,000 \$ 465,000 Manual Image: Manual	Aggregation Type	Decimal Precision		Currency	
RIES actual Value Manual Manual Manual 450,000 465,000 Varning Goal Best Manual Manual	+ Sum	▼ Default	-	Default	
450,000 \$ 465,000 Varning Goal Best I Manual I Manual I Manual	ERIES Actual Value	Worst		Red Flag	
Varning Goal Best I Manual I Manual I Manual	Actual Value	Worst	•	Red Flag	
ゴ Manual ・ ゴ Manual ・ ゴ Manual	ERIES Actual Value	Worst Manual 450,000	\$	Red Flag Manual 465,000	
	Actual Value	Worst لا Manual 450,000 Goal	\$	Red Flag Manual 465,000 Best	
	SERIES Actual Value [] Manual	Worst ح 🗹 Manual	•	Red Flag	

For example, here's a 4 Color Orange KPI.

And this is what that KPI looks like. Again, we don't have evenly spaced thresholds so the segments are different sizes.



Calculated KPIs

Overview

You can set up KPIs to automatically calculate their actual values and thresholds from other values in Spider Impact. For more information about what Spider Impact actually does when it's calculating a KPI field, please see the <u>Exploring</u> <u>How a KPI is Calculated</u> article.

Calculated KPI Details

Let's start things off with a simple example. We're going to create a calculated KPI called *Total Revenue* that is the sum of *Product Revenue*, *Training Revenue*, and *Book Revenue*.

🛱 Financial	<	Create KPI	₽v A v
PERSONAL	Q Find	Overview KPIs	Edit August 2020 👻 < >
숬 Bookmarks	+ New Scorecard Item	Name	Туре
PRESENTATION	Financial Profit and Loss	Total Revenue	• КРІ •
Strategy Maps	✓ ■ Revenue	Description	
Dashboards	Product Revenue	Type your description here	Advanced Options
🕒 Charts & Reports	Training Revenue		
Briefings	O Book Revenue		
FOUNDATION	O Total Revenue		
Scorecards	> 🖸 Cost of Sale 🔹 🔹	KPI DETAILS	
Initiatives	> 💿 Gross Profit 🛛 🔹	Scoring Type Calendar	Data Type
🕒 Files	> Operating Expenses	← Goal/Red Flag ▼ Monthly	→ Currency →
	> 🖸 Net Operating Profit 🛛 🔹 🗄	Manual Aggregation Type Calculated	Aggregation Type Decimal Precision

There's a lot going on in the Edit tab, so we'll look at each configuration option one at a time.

scoring Type	Ca	alendar		Data Type	
6 Goal/Red Flag	-	Monthly	•	Currency	
Manual Aggregation Type	Ca	alculated Aggregation Type		Decimal Precision	
+ Sum 3	• -	+ Sum (recomme	•	Default	
Currency					
Default	-				
Delautt					
Delaut					
SERIES					
SERIES Actual Value	Re	ed Flag		Goal	
SERIES Actual Value Calculated	Re	ed Flag 객 Manual	•	Goal	
SERIES Actual Value Calculated Any missing value makes entire equation blan	Re • [ed Flag	•	Goal	

- 1. We've changed the KPI's actual value from *Manual* to *Calculated*.
- 2. The *Goal* and *Red Flag* thresholds are still manually updated. As you can see, we've typed in default values for both.
- 3. We can choose a Manual Aggregation Type like *Sum* or *Average*. This only applies to the threshold values because they are manually updated.
- 4. We can choose a Calculated Aggregation Type. The options here are Sum (recommended) and Use Equation. This only applies to the Actual Value because it is calculated.
- 5. By default, if a KPI equation is referencing a value that is blank, the entire equation will immediately evaluate to blank. You can instead choose to treat missing values in the equation as 0, N/A, or Blank.
- 6. This is the button to set the KPI's equation. We'll cover that next.

KPI Equations

When you click the Set Equation button, it shows a dialog for building the equation for that series.

recards	•	Cost of Sale		APIDETAILS				
atives	٥	Gross Profit		Scoring Type		Calendar	Data Typ	e
	8	Set Equat	ion					ency
	ĺ	Actual Value E	Equation				allowed input: + - */()	recision
		Туре 1 я	uation here					
		Туре	КРІ	Series	Period			
		KPI 🔻	Select a KPI 🧪	Actual Value 🔻	Current 👻	Add		
		Cancel					Done	val
				Any missing value	ue makes e 👻	500,000	\$ 600,000	

- 1. This is where the equation that we're building goes. You can type text directly here.
- 2. This builds functions that we send into the equation.

Next we're going to choose the KPI that we want to reference by clicking the *Select a KPI* button.

recards		Cost of Sale	•	RPIDETAILS				
atives			•	Scoring Type		Calendar	Data Typ	•
		Set Equa	tion					ency
	ľ	Actual Value	Equation				allowed input: +-*/()	recision
		Type your e	quation here					
		Туре	КРІ	Series	Period			
		KPI 👻	Select a KPI 🧪	Actual Value 👻	Current 👻	Add		
		Cancel					Done	ual
				Any missing val	ue makes e 👻	500,000	\$ 600,000	

This stacks a second-level dialog where we choose the *Product Revenue* KPI.

Q Find	Q Find
 Marketing Customer Support Sales 	This KPI Financial Profit and Loss Revenue
 Operations Information Technology Human Resources Commercial Financial 	 Product Revenue Training Revenue Book Revenue Cost of Sale Gross Profit
रू च Expand All	₩E Expand All

When we click *Done* and the second-level dialog closes, our equation builder now looks like this.

nitiatives		Scoring Type C	alendar Data	Type
Files	Set Equation			
	•			ion
	Actual Value Equation		allowed input:	+-*/()
	Type your equation here			
		Series 3 Period 4		
	1 KPL V (1673) Product Revenue	Actual Value Current	Add 5	
	Cancel			Done
		Calculated		

1. The item type is KPI. We'll explain below how to reference other things like Initiatives and Scores.

- 2. This is the *Product Revenue* KPI that we selected. If you want to change the item we're going to reference in the equation, just click this button again.
- 3. We're going to include *Product Revenue*'s actual value in the equation, but we could reference one of its thresholds like Goal instead.
- 4. We're going to include *Product Revenue*'s value for the current period, but we could choose earlier or later periods.
- 5. When we're ready to add the data to the equation, click this Add button.

tives	0	Gross Profit	Scoring Type	Calendar	Data Type	
	Set Equat	ion				
	Actual Value	ation			allowed input: + - */()	
	M(1673)					
	Туре	КРІ	Series	Period		
	KPI 🔻	(1673) Product Revenue 🧪	Actual Value 🔻	Current 👻		
	Cancel				Done	
			E carculati			

Once you add a reference to a KPI, it looks like this:

As you can see, the syntax for referencing another KPI value is:



Now we'll type in a [space], a [+], and a [space], select the *Training Revenue* KPI in the second-level dialog...
Initiatives	Gross Profit	Scoring Type	Calendar	Data Type	
Files	Set Equation				*
	Actual Value Equation			allowed input: +- */()	vn v
	M(1673) +				
	Туре КРІ	Series	Period		
	KPI 🔻 (1674) Traini	ng Revenue 🧪 🛛 Actual Value 🔻	Current - Add		
	Cancel			Done	
		La cattolat	- Manuar	C Manuar	

... and click Add.

liatives	0	Gross Profit		Scoring Type	Cal	endar	Data Type		
25	Set Equa	tion							*
	Actual Value	Equation					allowed input: + - */()	ion	•
	M(1673)	+ M(1674)							
	Type	KPI	Serie	s	Period				
	KPI 🔻	(1674) Training Revenue	e 🧪 🛛 Actu	ial Value 🔻	Current -	Add			
	Cancel						Done		
				Carcolate		manuar	- Manuar		

One more time and our equation is finished. Let's click *Done*.

tiatives	Gross Profit	Scoring T	ype C	alendar	Data Type		
15	Set Equation						-
	•					ion	
	Actual Value Equation				allowed input: + - */()		-
	M(1673) + M(1674) + M	(1675)					
	Type KPI	Series	Period				
	KPI 👻 (1675) Book Reve	enue 🧪 🛛 Actual Value 🔻	Current 💌	Add			
	Cancel				Done		
							-

Back on the Edit tab, our equation now shows up for the Actual Value series.

Actual Value	Red Flag		Goal	
Calculated -	🖸 Manual	•	🗹 Manual	•
Any missing value makes ent 🔹	500,000	\$	600,000	Ş
M(1673) + M(1674) + M(1675)				

When we save the KPI and visit the Scorecards Overview tab, we can now see our calculated KPI in action.

٢	Total Revenue		0	* A* B* 6* 0
Q Find	Overview KPIs			Edit August 2020 👻 < >
+ New Scorecard Item	PERFORMANCE	HISTORICAL PERFORMANCE		*
Financial Profit and Loss				
Revenue	\$593K -\$2.45M	\$5M	Ň	
• Product Revenue		\$4M	///	
• Training Revenue		\$3M		
• Book Revenue		\$2M	°	
 Total Revenue 		ý a m		
Cost of Sale		\$1M	-0	0 0 0
Gross Profit	\$500K 6.4 \$600K	\$0	lan Feh Mar	Apr May Jun Jul Aug
Operating Expenses	RED SCORE GOAL	ACTUAL VALUE: AUGUST 2020 2019 2019	2020 2020 2020	2020 2020 2020 2020 2020
Net Operating Profit		\$593,000		
	ACTUAL AND THRESHOLD VALUES	Equation	RE	LATED ITEMS + Add
	sco	M(1673) + M(1674) + M(1675)	GOAL	No. of the Discourse
	• August 2020 6.4	\$593K \$500K	\$600K	No related items
* 등 Expand All 🖍 Edit 📢		Show Notes (0) 🔿		

Common Equation Syntax

Later in this article is a comprehensive list of all functions and operators that you can use in your equations, but here are examples of some of the most commonly used syntax.

Most Common Formulas	Format
Sum	sum(x, y,)
Average	avg(x1, x2, x3,)
lf	if(condition, truevalue, falsevalue)
Round	round(x), round(x, decimal_places)
To Date (YTD, QTD, etc.)	TD(calendar, kpi_id, series, aggregation)
Referencing a KPI (metric) value	M(kpi_id)
Referencing an Initiative Value	l(field, initiative_id)

If you select a block of text in your equation, a tooltip dialog will appear allowing you to wrap the selected text in a function.

•	Increase Revenue				
	Set Equation				
	Actua sum avg min max	ln 👻		allowed input: + - */()	
	M(935) + M(936) + M(937)	exp			
•		floor			ed
	Type KPI F	if	Period		
	KPI - (937) Book Revenue	im	Current • Add		
•		lg			ур
	Cancel	ln 🗸		Done	Curr
Cu	Aggrega	log	Decimal Precision	Currer	ncy
•	Improve Customer Satisfact • • • • • • • • • • • • • • • • • • •	mod	* Default	* Defa	ult
	Customer Satisfaction 🗧 🔹 🔤	polar			
•	Improve Customer Retention	pow			
	Customer Churn Actual V	rand	Red Flag	Goal	
_		re			

Self-Referential Equations

You can also choose *This KPI* when building equations. This allows you to make self-referential equations, for example goals that are automatically 10% higher than the previous year's actual value.

	😫 Financial Profit and Loss 🔹 🔹 👘 👘		
Contestentation Strates	Select a KPI		
🙃 Dashb			
🕑 Charts	Q Find	Q Find	
🖽 Briefin	Mobileworld Inc.	O This KPI Street	
OUNDATIO	Key Performance Indicators	Financial Profit and Loss	
🟗 Scorec	Financial	Revenue	
🗹 Initiati	Marketing	O Product Revenue	
🗘 Datase	Customer Support	O Training Revenue	
D Files	Sales	O Book Revenue	
	Operations	Cost of Sale	
	Information Technology	Product Costs	
	Human Resources		*
	* ₩ Expand All	>∃ Collapse All	5
	Cancel	D	one
	O Pension Contribution		
	OWNERS		

To reference a KPI's own value, the syntax is simple:

М()

If you want to reference a KPI's own threshold (Red Flag), it looks like this:

T(Red Flag)

A KPI's own value for three periods earlier looks like this:

M(-3p)

Similarly, a KPI's own threshold (Goal) from three periods earlier looks like this:

T(Goal, -3p)

Referencing Scores

You can include the score from any scorecard item in your equation. Just select *Score* from the *Type* dropdown on the left.

Operating Expenses			
Set Equation	on		Туре
Actual Value Ec	quation		allowed input: +- */() Currency
M(1673) +	M(1674) + M(1675) + I(TB,8017) +	S(921)	mal Precision
			ault
Туре	Scorecard Item	Period	
Score 👻	(921) Improve Customer Satisfaction 🧪	Current 👻	
Cancel			Done
	Actual Value	Red Flag	Goal

This is the syntax for referencing the score for the current period for a scorecard item with an ID of 123 is:

The syntax for referencing a scorecard item's score in another period is similar. In this example, we're referencing the score from the previous period for item 123.

Referencing Initiative Values

You can include vales from Initiative items by selecting *Initiative* in the Type dropdown on the left. Here we're using the *Total Budget* from the *Migrate Servers to the Cloud* initiative in our equation.

Set Equation	ı		
Actual Value Equ	ation	allo	owed input: + - */()
Type	Initiative (8017) Migrate Servers to Cloud 🖌	Calculation Total Budget - Add	
Cancel		% Complete Projected Schedule Variance	Done
	Actual Value	Total Budget Money Spent to Date Budget Remaining	G(
	Any missing value makes entire equa	Projected Cost	\$

They syntax when referencing an initiative value is:

I(field, initiative_id)

For example, to reference the budget remaining for initiative 123, the equation would be:

I(BR, 123)

You can reference values for these initiative fields:

- **BR** Budget Remaining
- **DE** Days Elapsed
- MSTD Money Spent to Date
- **PBV** Projected Budget Variance

- **PBVP** Projected Budget Variance Percentage
- PC % Complete
- **PCOST** Projected Cost
- **PSV** Projected Schedule Variance
- **PTE** % Time Elapsed
- **TB** Total Budget

To-Date Function

By choosing *To Date* in the *Type* dropdown, you can build equations that aggregate values over time. The most popular use of the to-date function is calculating Year To Date values. In this example we're including the *Sales Revenue* quarterly sum.

Actual Value Equation			allowe	d input: + - * /
M(1673) + M(1674) + M(1675) + I(TB,80	D17) + TD(Quarter	y,1466,Actual Value,	Sum)	
Туре КРІ	Series	Calendar	Aggregation Type	
	Actual Value 🔻	Quarterly -	Sum 👻	
To Date 👻 (1466) Sales Revenue (US) 🧪		,		

The syntax for the to-date function is

TD(calendar, kpi_id, field, aggregation)

For example, if we wanted to do an average year-to-date for actual value of the KPI with an ID of 123, the equation would be:

TD(Yearly, 123, Actual Value, Average)

If/Else

The syntax for an IF statement is:

```
if (condition, truevalue, falsevalue)
```

Here's an example equation. "If the value for KPI #123 is 5, this equation returns 10. Otherwise return 0."

if(M(123) == 5, 10, 0)

Note that you'll need to use the double equal operator == when checking for an equal value, as explained below.

You can also string together multiple IF statements to create an IF/ELSE chain like this. "If the value for KPI #123 is 5, return 10. Else if the value for KPI #123 is 4, return 100. Else return 0."

if(M(123) == 5, 10, if(M(123) == 4, 100, 0))

Yes/No KPIs

Most KPIs have number for values, but Yes/No KPIs are different. These can be referenced as booleans (true/false) or as numbers (1/0).

In this example, we're referencing a Yes/No KPI's value in a number KPI's equation. "If the value for KPI #123 is yes, return 5. Else return 20"

```
if(M(123), 5, 20)
```

In this example, we're referencing a number KPI's value in a Yes/No KPI's equation. "If the value for KPI #456 is greater than 7 return true. Else return false"

```
if(M(456) > 7, true, false)
```

This is the same as:

if(M(456) > 7, 1, 0)

Note that in the example above we're using 1 and 0, but any non-zero number will evaluate to Yes.

Blank (null) and Not Applicable (N/A)

In addition to their normal values, KPIs can also have values that are:

- 1. Blank (also called null).
- Not Applicable (also called N/A). This is only available when the "Show N/A Option" is enabled in <u>Application Administration</u>.

	N/A	ACTO	RED	GOAL	
October 2020	\bigcirc		\$ 35,000	\$ 40,000	\$
November 2020	\bigcirc	39,650	\$ 35,000	\$ 40,000	\$
December 2020	2	N/A	35,000	\$ 40,000	\$

You can reference N/A and empty values using the `isnull` and `isna` functions like this:

```
if(isnull(M(123)), 5, 20)
```

and this:

if(isna(M(123)), 5, 20)

To set a value to empty, the equation would look like this:

if(M(123) > 8, null, 20)

Returning a N/A value would look like this:

if(M(123) > 8, na, 20)

Operators

Spider Impact supports a wide variety of operators in equations.

Operator	Symbol
Addition, Subtraction	+, -
Multiplication	*
Division	/
Not Equal, Equal	!=, ==
Power	٨
Boolean Not	!
Unary Plus, Unary Minus	+×, -×
Modulus (remainder)	%
Less Than, Greater Than	<, >
Less or Equal, More or Equal	<=, >=
Boolean &	&&
Boolean Or	

Functions

This is a comprehensive list of all functions available in Spider Impact. Please see above for more information and examples about using the most popular functions.

Spider Impact Functions	Format
KPI's own value	M()

KPI's own threshold	T(field)
KPI's own value in another period (three earlier)	M(-3p)
KPI's own threshold in another period	T(field, -3p)
another KPI value	M(kpi_id)
another KPI threshold	T(kpi_id, field)
another KPI value in another period	M(kpi_id, -3p)
another KPI threshold in another period	T(kpi_id, field, -3p)
another scorecard item score	S(item_id)
another scorecard item score in another period	S(item_id, -3p)
initiative item's value (see above for list of fields)	l(field, initiative_id)
To-date aggregation (Sum or Average)	TD(calendar, kpi_id, field, aggregation)
Empty (null) value check	isnull(kpi_id)
N/A (not applicable) value check	isna(kpi_id)

Statistical Functions	Format
Average	avg(x1, x2, x3,)
Sum	sum(x1, x2, x3,)

Minimum	min(x1, x2, x3,)
Maximum	max(x1, x2, x3,)

Rounding Functions	Format
Round (round up when tied)	round(x), round(x, decimal_places)
Round (round to even value when tied)	rint(x), rint(x, decimal_places)
Floor	floor(x)
Ceiling	ceil(x)

Other Common Functions	Format
Str (convert number to a string)	str(x)
Absolute Value / Magnitude	abs(x)
Random Number (between 0 and 1)	rand()
Modulus (remainder when x is divided by y)	mod(x,y)
Square Root	sqrt(x)
Binomial coefficients	binom(n, i)
Signum (-1,0,1 depending on sign of argument)	signum(x)

Trigonometric Functions	Format
Sine	sin(x)
Cosine	cos(x)
Tangent	tan(x)
Arc Sine	asin(x)
Arc Cosine	acos(x)
Arc Tangent	atan(x)
Arc Tan with 2 parameters	atan2(y, x)
Secant	sec(x)
Cosecant	cosec(x)
Co-tangent	cot(x)
Hyperbolic Sine	sinh(x)
Hyperbolic Cosine	cosh(x)
Hyperbolic Tangent	tanh(x)
Inverse Hyperbolic Sine	asinh(x)
Inverse Hyperbolic Cosine	acosh(x)
Inverse Hyperbolic Tangent	atanh(x)

Log and Exponential	Format
Natural Logarithm	ln(x)
Logarithm base 10	log(x)
Logarithm base 2	lg(x)
Exponential (e^x)	exp(x)
Power	pow(x)

Exploring How a KPI is Calculated

Introduction

Spider Impact is great at calculating KPI values and aggregating them over time and across organizations. It's important for everyone in your organization to have complete faith in how a number was calculated, however, and Spider Impact shows its work.

For example, it can sometimes be difficult to understand the nuanced differences between aggregation types like "sum" and "use equation." Although this explanation gets a little technical, don't worry, Spider Impact is easier to use than ever. The big take-away here is that that you can hover your mouse over a number on the Scorecards Overview tab to see how it was calculated.

Exploring KPI Calculations

On the Scorecards Overview tab there is an "Actual and Threshold Values" table that shows you all of the KPI values and thresholds that go into the currently selected KPI, regardless of whether those values are calculated or not. You can interact with these numbers to see where they come from.

In this example, we're looking at a monthly KPI in quarterly mode. The KPI's aggregation type is average, so its quarterly total of 1,869 was determined by averaging its three monthly values listed in the "actual and threshold values" table.



If you hover your mouse over the April 2018 monthly values, you can now see that it's based on an equation using the values of four other KPIs.



If you want to explore further, just click the monthly number that you're hovering over. This shows a dialog containing both the original equation and a version of the equation with April 2018 actual values substituted for the KPI references. When you hover over individual parts of the equation, there's a tooltip telling you the name of that KPI, and its corresponding actual value is highlighted below.

ata Used in Calculations	
ACTUAL VALUE EQUATION	
Any missing valu Number of Customers plank	
(M(935) + M(936) + M(937)) / M(1315)	
APRIL 2018 ACTUAL VALUES	
(908K + 900K + 44K) / 594 = 3,118	
Close	

Finally, you can click on any of these KPI references to go to that KPI's Scorecard Overview tab. By doingthis, you can trace down complicated nested equations to find out exactly where a calculated number comes from.

Instead, we'll edit our original KPI to show how the software visualizes different aggregation types. We'll change the calculated aggregation type from "average" to "use equation."

Scoring Type		Calendar		Data Type	
Goal/Red Flag	•	Monthly	•	# Number	•
Manual Aggregation Type		Calculated Aggregation Type		Decimal Precision	
-z ∍ Average	•	Use Equation	•	Default	•
Units		Average (recommended)			
	_	Use Equation	~		

Now when we go back to the Overview tab, things look different in the "actual and threshold values" box. The goal and red flag thresholds are manually updated for this monthly KPI, so they're still in monthly rows. But, a single quarterly actual value is now listed on top rather than separate actual values for every month.



That's because when we changed the calculated aggregation type, the software calculates the KPI's quarterly value differently.

As we saw earlier, this KPI's actual value is calculated, and its calculated aggregation type is now "use equation" rather than "average." The "average" aggregation type calculated each of this KPI's monthly values and then averaged them. The "use equation" aggregation type does things in the opposite order. Itfirst calculates the quarterly values for every KPI referenced in the equation, and then plugs those values into the equation.

Long story short, this KPI's monthly values aren't directly used to determine its quarterly value anymore, so the software doesn't show those monthly values in the table.

Just like before, when we hover over the calculated value, we can see its equation in the tooltip.



And, like before, clicking on the calculated number shows a dialog. This time, however, the equation is using quarterly values rather than monthly. You can see that each of the KPIs in the equation have first been aggregated on their own, because their Quarter 2 values are used in the equation.

Revenu	Data Used in Calculations	
enue		Q
enue	ACTUAL VALUE EQUATION: AVERAGE REVENUE PER CUSTOMER	20
of Custa Revenu	Any missing value Number of Customers blank	æ
fitabilit	(M(935) + M(936) + M(937)) / M(1315)	- 1
s Overh	QUARTER 2, 2018 ACTUAL VALUES	
	(918K + 2.69M + 132K) / 2,120 = 1,765	
ies		
Capacity	Close	

Linked Scorecard Items

One of the scorecard item types that you can choose is Linked Item. This allows you to add a copy of an existing scorecard item to your scorecard. For example, you may want to reuse a KPI that's already being tracked in another organization, or maybe you want to create a theme scorecard that includes objectives from other organizations.

Whenever that source item is updated with new KPI values or scores, that information will instantly be reflected in your linked item.

🛱 Mobileworld In	c. <	Product Revenue	
	Q Find	Overview KPIs 9	Edit August 2020 👻 🤇
삸 Home ☆ Bookmarks	+ New Scorecard Item	This is where you edit and create scorecard items one at a time. If yo	v want to edit many at once, use the Report Writer to filter for items
	Mobileworld Balanced Scorecard •	to edit, then click the Mass Edit button. For example, <u>this report</u> sho anything, including item names, aggregation, ne, or owners and up	ws all scorecard items in this organization, where you can change vdaters.
Strategy Maps	▲ Financial •		
Dashboards	 Increase Revenue 	Name	Туре
🕒 Charts & Reports	 Product Revenue 	Product Revenue	& Linked Item
🛱 Briefings	 	Description	Weight
	Ø Book Revenue •	Type your description here	25%
Scorecards	 Total Revenue 		
✓ Initiatives	 Improve Profitability 		Advanced Options
🕒 Files	 Reduce Sales Overhead Cos 		
	▲ Customer •	CHOOSE SOURCE ITEM	
	▲ Internal Processes •	Q Find	Q Find
	A Organizational Capacity	Key Measures	Financial Profit and Loss
		Financial	✓ ■ Revenue
		Marketing	
		Customer Support	 Training Revenue
		Sales	O Book Revenue
		• US	> 🖸 Cost of Sale
		East Coast	> 🖬 Gross Profit
		Northeast	> Operating Expenses
		Southeast	r
		>∃ Collapse All	*∃ Expand All
		USE FROM SOURCE ITEM 2	
		✓ Name and Description ✓ Tags	
		✓ Notes ✓ Related Items	
		✓ Owners	
Q 🌣 📢	° ∃ Expand All ✓ Done ◀	G→ Move D Copy 🗇 Delete	Cancel Save

There are two things that make linked items unique from other scorecard items.

- 1. You need to choose where the source item is. In this example we're choosing the "Product Revenue" KPI from the "Financial" organization.
- 2. You need to choose what to pull from the source item. It's always going to reuse things like scores, actual values, and thresholds because that's the point of a linked item. But, you can choose to override things like the item's Name, or you can decide to not share Notes with the source item.

Editing Multiple Scorecard Items at Once

The mass-edit feature that is built into the Report Writer allows you to edit multiple scorecards at once, and it can save you a lot of time. In this example we're going to find all of the red KPIs and then assign our helpdesk team as their owners.

The first step is to create a new report showing all KPIs that are red for the current period. Before we save the report, we can now see a "Mass Edit" button on the bottom of the screen.

Ô	Mobileworld Inc. <	Report Writer				
	Q Find	Overview			Edit	May 2018 👻 < >
کد چ	+ New Report 🗅 New Folder	NAME	ORGANIZATION	OWNERS	MAY 2018	
	🐣 Red Measures Report	Product Revenue	Financial	Nora Roberts	\$50	
	Report Writer Red Measures Report	Product Costs	Financial	Joe Abercrombie	\$278K	
G	Scorecard Item Owner/Updater Report	Total Costs	Financial		\$327K	
	🐣 Measure Comparison Report	Pension Contribution (3%)	Financial		\$7,438	
	Financial Overview Report	Marketing & Advertising	Financial	David Baldacci	\$63K	
⊡ ©	 Marketing Overview Report 	Interest & Bank Charges	Financial		\$15.6K	
	🐣 HQ Scorecard	Office Rental	Financial	Brandon Sanderson	\$51.6K	
	🗳 Scorecard Structure Report	IT & Communications	Financial		\$35.9K	
		Travel	Financial		\$15.5K	
		Twitter Mentions	Marketing		0	
		Facebook Likes	Marketing		266	
		% Calls answered	Customer Support		91. %	
ব ≎		Customer Satisfaction Survey	Customer Support	Clive Keyte	89.1%	
	Y = Expand All ✓ Edit	<i>i</i> You haven't saved this report yet				Mass Edit Save

When you click the "Mass Edit" button, a column of checkboxes appears on the left. You can choose individual scorecard items that you want to edit, or you can click the dark checkbox on the top to select all of them. When you're done, click "Edit Selected Items."

Û	Mobileworld Inc. <	Report Writer			
ме	Q Find	Overview		Edit	May 2018 👻 < >
꼬	+ New Report 🗅 New Folder	NAME	ORGANIZATION	OWNERS	MAY 2018
VIEW	Red Measures Report	Product Revenue	Financial	Nora Roberts	\$50
	 Report Writer Red Measures Report 	Product Costs	Financial	Joe Abercrombie	\$278K
С Ш	Scorecard Item Owner/Updater Report	✓ Total Costs	Financial		\$327K
DATA	Measure Comparison Report	Pension Contribution (3%)	Financial		\$7,438
	Financial Overview Report Sales Overview Report	Marketing & Advertising	Financial	David Baldacci	\$63K
Ľ	Marketing Overview Report	✓ Interest & Bank Charges	Financial		\$15.6K
	🐣 HQ Scorecard	✓ Office Rental	Financial	Brandon Sanderson	\$51.6K
	Scorecard Structure Report	✓ IT & Communications	Financial		\$35.9K
		✓ Travel	Financial		\$15.5K
		V Twitter Mentions	Marketing		0
		Facebook Likes	Marketing		266
~		V % Calls answered	Customer Support		91.9%
ע ג		Customer Satisfaction Survey	Customer Support	Clive Keyte	89.1%
►	শর Expand All 🖍 Edit ◀	<i>i</i> You haven't saved this report yet		Ed	it Selected Items Done

This brings up a dialog where you can choose to edit any property of the selected items. You literally change anything, including name, description, and scoring type. In this example we've decided to add the "Help Desk & IT Support" group as Owners.

D New Folder					
w Report	Edit Selected	d Items		OWN	
port	To make chang enter the new v	tes to all selected scorecard items, select a field to change, value, and select Save.			
ew Report.	CHANGE	Owners	•		
re Report	ACTION	Add the following owners	•	r r	
	OWNERS Help Desk & IT	Support (Communication Users)	ا		
	Start typing	•			
	Cancel		Save		
		- manual			

When we click "Save," we see a message on top saying that the scorecard items have been edited, but the report hasn't been updated yet to reflect the changes. That's because sometimes you'll want to make additional changes to those same scorecard items, but the edits you make can change what items show up in the report.

Ô	Mobileworld Inc. <	Repo	ort Writer				
	Q Find	Over	view		Edit	May 2018 👻 🔇	: >
view	+ New Report D New Folder C Red Measures Report Report Writer	110 o Your I show	bjects successfully modified. report hasn't been updated yet to show the ch the latest data.	anges you just made. When yo	u're done editing, click	Done to refresh the report a	Ind
٢	🐣 Red Measures Report		AME	ORGANIZATION	OWNERS	MAY 2018	
ш	Scorecard Item Owner/Updater Report		Product Revenue	Financial	Nora Roberts	\$50	
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	🗳 Sales Overview Report		Total Costs	Financial		\$327K	
C	Marketing Overview Report		Pension Contribution (3%)	Financial		\$7,438	
	HQ Scorecard Scorecard Structure Report		Marketing & Advertising	Financial	David Baldacci	\$63K	
			Interest & Bank Charges	Financial		\$15.6K	
			Office Rental	Financial	Brandon Sanderson	\$51.6K	
			IT & Communications	Financial		\$35.9K	L
			Travel	Financial		\$15.5K	
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\$		_					
•	*	🪺 You h	naven't saved this report yet		Ed	lit Selected Items	Done

Once you click "Done" it will re-run the report, showing your updated results. You can see here that we've now added the Help Desk group as the owner to all of the red KPIs.

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٩	🐣 Red Measures Report	Product Co
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	🐣 HQ Scorecard	Interest & E
	Scorecard Structure Report	Office Rent
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USING SPIDER IMPACT

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.

		Add Widget		
		=		
Image	Text	Bubble	Chart	Speedometer
		<u> </u>		
Linear Gauge	Report	Notes	Timeline	Embedded

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

- <u>Image</u>
- <u>Text</u>
- Bubble
- <u>Chart</u>
- Speedometer and Linear Gauge
- <u>Report</u>
- <u>Notes</u>
- Timeline
- <u>Embedded</u>

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 <u>Widget Spacing</u>, <u>Alignment</u>, and <u>Sizing</u> article for more information.



Automatically Resizing Canvas

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




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

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



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



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



Automatic Ordering

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



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



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

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



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



Locking Widgets

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

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



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

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

Widget Spacing, Alignment, and Sizing

Resizing

When you select a widget, you'll see resize handles on the sides and corners.



Just drag them to resize the widget.



You can also select multiple widgets (with drag or shift-click) and resize them all at once. Here we're resizing the two wide charts on the right.



To resize widgets to specific dimensions, choose "size" in the widget's configuration menu, and then type in a height or width. If multiple widgets are selected, your changes apply to them all. In this example, all of the widgets have the same width of 165, so it pre-fills that number in the size menu.



When we change the width to 90, all of the widgets instantly resize.



Align

You can select multiple widgets and then align them with top, bottom, right, left, middle vertical, or middle horizontal alignment. In this example we've selected four dashboard widgets.



When we click the align top button, it moves all of the selected widgets to the highest point of all four widgets.



Distribute

The Distribute button allows you to select multiple widgets and then evenly space them horizontally or vertically. This example shows four widgets that are not evenly spaced.



After clicking the button, the widgets are now evenly spaced.



Alignment Snapping Options

There are three different snap-to options when editing dashboards. The default option is Snap-to Widgets, which uses the size and position of other widgets on the dashboard as a guide when you're moving or resizing widgets.



Another option is Snap-to Grid, which aligns your widget position and size to a grid that only shows up when you're editing.



Finally, you can choose Snap-to None, which disables snapping all together. This is useful when fine-tuning layouts or when there are widgets that are irregularly placed.

	[] Fullscreen 🏶 Settings
	< Snap To
Average Revenue	Widgets
Book Revenue	Grid
	✓ None

Dashboard and Strategy Map Backgrounds

Overview

Dashboards and strategy maps look even better when you use image widgets creatively. For example, you can create a precise layout that looks exactly like the presentations your leadership team is is used to seeing. This is just a screenshot of a PowerPoint slide with dashboard widgets on top.



Or you can spice up your dashboard with translucent layout elements, like these Aviation and Travel background images.



You can even overlap map images with colored bubbles that show the performance. This example shows small performance bubbles on European cities.



In this article we'll show you the general approach to using background images on dashboards and strategy maps.

Creating the Image

Let's start with a real-world example. The <u>Balanced Scorecard Institute</u> uses this slide in some of their training materials, and it's a great example of a strategic planning and management system. How would you get something like this into Spider Impact?

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5 *	Balanced Scorrcard Institute	Strategic P	lanning and Mar	nagement System	n Example
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	Mission: Strategic	Provide effective and fisc	ally responsible services in a manner that p	bromotes high standards for community life	
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8	Strategic Results: Maintain an ethical and transpa that engages its constituents a effective and efficient services.	arent government Create a saf nd provides families can mental, pysi	e, thriving and engaged community so flourish through achievement of social, nical and cultural well-being.	Create and maintain a safe, secure community-oriented city that is clean and vibrant.	Offer abundant opportunity for financial stability and advancement for all socio-economic levels.
	Strategic Objectives and	Strategy Map	Measures	Targets	Initiatives
9	Constituent/		Livability satisfaction score	 >90% this year 	
* 🖘 🖂	Stakeholder	Improve	Program satisfaction score	•>85% this year	Green Space program
10	Program Ind	crease Awareness	 Per capita service utilization 	 65% this year 	New business startup program
10	Outcomes	Accessibility	 Business permits and licenses 	 ↑9.5% each quarter 	 Community engage committee
			Per capita income	• 13% this year	 Partnering program
11			Tourism revenue	 ↑6% this year 	
127	Financial	Improve Land	Controllable expenses	 	Simplify tax payments
	Stewardship Reduce Waste	and Asset	Asset value	• 🛧 8% this year	Asset resale program
12		Management	 Strategic projects on time and budget 	* 95% this year	 Energy savings program
	Business	1	 Index of program results 	 85% this year 	
*	Processes Improve Im	Improve city	Shared systems	 35% this period; 50% this year 	Partner recruitment program
13	Delivery Effici	ency and Promotion/ Harkoting	Response time changes	 ↑5% this period 	Satisfaction surveys
	Jervices	Marketing	 Audit score of communication effective 	eness +>90% this period	
× 19	Organizational		Recruitment effectiveness	*> 80% this period	
14	Capacity	Improve	 Retention effectiveness 	 92% this year 	Customer service training
	Increase Staff Ouality	Utilization of	 Training effectiveness 	 >93% this period 	Program evaluation process
·*		Technology	Employees use of appropriate technology	ogy • ↑ 45%	riogram evaluation process
15	Core Values:	 Integrity-Based Leadership 	ics • Accountability• Commitment to Excellen	ce • Citizen-Centered • Mutual Respect	8
*					©1997-2020 Balanced Scorecard Institute.
16					
Slide 8 of 27	English (United States)		1 =	Notes 📕 Comments 📃 👬 🞚	🗐 🖵 – ——— + 125% 🗄 🖉

First, let's remove all of the information on the slide that we don't want to show up in Spider Impact. In PowerPoint that means hiding background graphics. This removes the slide header and footers.

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9	Themes: Strategic Results:	Maintain an ethical and transparent government that engages its constituents and provides effective and efficient services.	Create a safe, 1 families can flo mental, pyshic	thriving and engaged community so purish through achievement of social, al and cultural well-being.	Create and maintain a safe, secure community-oriented city that is clean and vibrant.	Offer abundant opportunity for financial stability and advancement for all socio-economic levels.	
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12	Constituent			Livability satisfaction score	• >90% this year		-
	Stakeholder		Improve	Program satisfaction score	•>85% this year	a Cross Space prodram	
11		Improve Program	Awareness	Per capita service utilization	 65% this year 	New business startup program	
		Outcomes Quality of Life	Accessibility	Business permits and licenses	• 19.5% each quarter	 Community engage committee 	
10			1	Per capita income	 ↑3% this year 	 Partnering program 	
12 969-9				Tourism revenue	• 16% this year		
*	Financial			Controllable expenses	 	Simplify tax payments	
12	Stewardship	Reduce Waste and Asset		Asset value	• 🛧 8% this year	Asset resale program	
		Management		Strategic projects on time and budget	• 95% this year	 Energy savings program 	
:* M	Business	1		 Index of program results 	 85% this year 		
14	Processes		morouo citu	Shared systems	 35% this period; 50% this year 	 Partner recruitment program 	
		Delivery	Promotion/	Response time changes	 ↑5% this period 	City marketing program Satisfaction suprove	
		Services Effectiveness	Marketing	Audit score of communication effective	ness •>90% this period	Subsucción surveys	
15	Organization	nal		Recruitment effectiveness	•> 80% this period		
*	Capacity		arouge	Retention effectiveness	 92% this year 	 Customer service training 	
		Increase Staff Utiliz	ation of	Training effectiveness	• >93% this period	Individual development plans Program evaluation process	
16		Lowest Learning Learning Learning	Hology	Employees use of appropriate technolog	gy • ↑ 45%	riogrameratation process	
*	Core Valu	• Integrity-Based	Leadership • Ethics	• Accountability• Commitment to Excellence	e • Citizen-Centered • Mutual Respect		
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Slide 8 of 27 English (United	i States)					Notes Comments	트 👪 🖽 🖵 + 132% 🔛

Now we're going to remove all information on this slide that we want to automatically update based on live data in Spider Impact. We end up with this:

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6								
*		Vision:			Be a world-class model for a successful u	rban community		
8		Mission:	Provide eff	ective and fiscal	ly responsible services in a manner that p	promotes high standards for community life	-	
		Strategic Themes:	Government Reform	Nurt	uring Children and Families	Public Safety	Economic Abundance	
9 *		Strategic Results:	Maintain an ethical and transparent government that engages its constituents and provides effective and efficient services.	Create a safe, families can fl mental, pyshi	thriving and engaged community so ourish through achievement of social, cal and cultural well-being.	Create and maintain a safe, secure community-oriented city that is clean and vibrant.	Offer abundant opportunity for financial stability and advancement for all socio-economic levels.	
10			Strategic Objectives and Strategy Map		Measures	Targets	Initiatives	
11		Constituent/ Stakeholder	\rightarrow \leftarrow					
12 *			\uparrow	↑				
13		Financial Stewardship						
¹⁴ ₩		Business						
15 *		Processes	\leftarrow \rightarrow	I				
16 *		Organization Capacity	nal					
17			_					
18 *		Core Value	Integrity-Based	.eadership • Ethic	s • Accountability • Commitment to Excellen	e • Citizen-Centered • Mutual Respect		
19 * Slide 8 of 27	English (United	States)				≜ Notes ■ Comments		+ 160% E

Finally we need to turn that slide into an image, and there are a variety of ways you can do this. PowerPoint has the ability to export slides as images, but if you do that, you'll need to edit the image to crop off the extra white space on the edges. Instead, we're going to take a screenshot of just the relevant part of the slide.

In Windows you can do this by *Windows Key* + *Shift* + *S*, selecting the region you want, and then pasting it into Paint. On Mac you can do this with CMD + *Shift* + 4 and it will save the image to your desktop.

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Home In	nsert Draw	Design Transitio	ns Animations Slide Show Review View 🖓	Tell me			년 Share 🖓 Comments
Paste 🐇	Cut Copy ~ Ne Format Sli	Layout * C Reset de Section * E	Candara (Headings) 9.5 A^* A^* A_0 $\exists \equiv \forall$ 3 I U \Rightarrow X X X		Image: State State State Image: State State Image: State Image: State I	es Text Box Arrange Quick Z Shape Fill ~	Pasign Ideas
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7 🚬		Vision:			Be a world-class model for a successful u	rban community	
8		Mission:	Provide eff	ective and fiscal	ly responsible services in a manner that p	promotes high standards for community life	2
1 (<u>14</u>) - 12		Strategic Themes:	Government Reform	Nurte	uring Children and Families	Public Safety	Economic Abundance
9 *		Strategic Results:	Maintain an ethical and transparent government that engages its constituents and provides effective and efficient services.	Create a safe, families can fl mental, pyshio	thriving and engaged community so ourish through achievement of social, cal and cultural well-being.	Create and maintain a safe, secure community-oriented city that is clean and vibrant.	Offer abundant opportunity for financial stability and advancement for all socio-economic levels.
10	Ē		Strategic Objectives and Strategy Map		Measures	Targets	Initiatives
11		Constituent/ Stakeholder	\rightarrow \leftarrow				
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19 ★ Slide 8 of	27 English (I	Inited States)				≜ Notes ■ Commente	

Make sure the image is large enough so that it doesn't look pixelated on your dashboard. You'll usually be in good shape if your image is at least 1,600 pixels wide. In this example the screenshot is actually 3,200 pixels wide because I want it to look good on high resolution screens.

Compressing the Image

Large dashboard images load slowly, so we want to make sure the file size isn't too big. Most dashboard background images will work best in the PNG format because they're made of solid colors. If yours has a lot of gradients or photos, however, JPEG may be a better choice.

Raw PNG images can be very large, though, so we're going to reduce the file size before we use our screenshot in Spider Impact. There are a variety of tools to do this, and here we're going to use <u>ImageAlpha</u> and <u>ImageOptim</u>, both of which are for Mac. ImageAlpha reduces the size of PNGs by changing the number of colors in their color palate. In this example our background image still looks great with only 16 colors, and its size is only 10% of what it was before. Every image is different, though, and you'll often be best at 128 or 64 colors. Be sure to zoom in on the details to make sure you're not over-compressing.



Next we'll use ImageOptim to strip off all of the extra metadata and make the file as small as possible. This app works with any image format and has saved us an additional 12%.

		ImageOptim			
Fi	le		^	Size	Savings
V 2	020-12-12_11-10-35.png		Q	77,002	12.2%
+	Drag and drop image files onto the area	above		* C	Again

By using these two apps, we've gone from 825K to 77K. Again, there are many image compression utilities available that do this exact same thing.

Creating Your Dashboard

Now it's time to add your dashboard. Be sure to resize it large enough so that there's plenty of room to add content, and the lock it in place.

🛱 BSI 🔍	BSI				6 A 0
PERSONAL	View			Edit	lovember 2020 👻 < >
ත් Bookmarks	Name				
PRESENTATION	BSI				
Dashboards	Gopy ل⊖ Move ل	1 Delete			Cancel Save
Briefings	+ • • = = = B				[] Fullscreen 🎄 Settings
	Vision:	Be a world-class model for a successful ur	rban community		Edit Widget
▶∎ Scorecards	Mission: Provide	effective and fiscally responsible services in a manner that p	romotes high standards for community life	\$	Ealt widget
Initiatives	Strategic Government Reform	Nurturing Children and Families	Public Safety	Economic Abundance	A lock
🕒 Files	Strategic Results: Maintain an ethical and transparent government that engages its constituents and provides effective and efficient services.	Create a safe, thriving and engaged community so families can flourish through achievement of social, mental, pyshical and cultural well-being.	Create and maintain a safe, secure community-oriented city that is clean and vibrant.	Offer abundant opportunity for financial stability and advancement for all socio-economic levels.	
	Strategic Objectives and Strategy Map Constituent/ Stakeholder	Measures	Targets	Initiatives	
	Financial Stewardship Business Processes Organizational Capacity Core Values: • integrity Bas	ed Leadership • Ethics • Accountability• Commitment to Excellence	e • Citizen Centered • Mutual Respect		
०.०≵ ।	Financial Stewardship Processes Organizational Capacity Core Values: • Integrity das	Ad Leadership + Ethics + Accountability* Commitment to Excellence	e • Citizen Centered • Mutual Respect		

And finally we'll add widgets. Here we've added bubbles for the objectives, measures, targets, and initiatives. For the Measures, Targets, and Initiatives we've turned off the bubble background so only the text shows up. That way you can click on the text to drill down for more information.



When we're done we have a fully interactive dashboard showing live data, all in a format that our organization is familiar with.

SI <	BSI					0 * 4 & +
IAL	View					Edit November 2020 👻
me						
okmarks						
	Vision:			Be a world-class model for a successful u	ban community	
ATION	Mission:	Provide eff	ective and fiscal	y responsible services in a manner that p	romotes high standards for community life	
tegy Maps	Strategic Themes:	Government Reform	Nurte	uring Children and Families	Public Safety	Economic Abundance
nboards	Themes.	Maintain an ethical and transparent government	Create a safe,	thriving and engaged community so	Create and maintain a safe, secure	Offer abundant opportunity for
ts & Reports	Results:	that engages its constituents and provides effective and efficient services.	families can fl mental, pyshic	ourish through achievement of social, al and cultural well-being.	community-oriented city that is clean and vibrant.	financial stability and advancement for all socio-economic levels.
ings		Strategic Objectives and Strategy Map		Measures	Targets	Initiatives
м	Constituent	1		Livability satisfaction score	>90% this year	
	Stakeholder		Improve	Program satisfaction score	>85% this year	Green Space program
ecards		Program	vareness and	Per capita service utilization	65% this year	New business startup program
tives		Outcomes	lecessionary	Business permits and licenses	Increase 9.5% this quarter	Community engage committee
			1	Per capita income	Increase 3% this year	Partnering program
				Tourism revenue	Increase 6% this year	
	Financial			Controllable expenses	Decrease 5% this year	Simplify tax payments
	Stewardship	Reduce Improve Land and Waste Asset Management		Asset value	Increase 8% this year	Asset resale program
		Assee Humgement		Strategic projects on time and budget	95% this year	Energy savings program
	Business	A		Index of program results	85% this year	Partner recruitment program
	Processes	Improve	Improve	Shared systems	35% this period; 50% this yea	r cita da si
		Delivery CEfficiency and City	ty Promotion /	Response time changes	Increase 5% this period	City marketing program
		Services	Marketing	Audit score of communication effectivene	ss >90% this period	Satisfaction surveys
	Organization	nal		Recruitment effectiveness	>80% this period	Customer service training
	Capacity		nprove	Retention effectiveness	92% this year	Individual development plans
		Increase Staff Quality	zation of	Training effectiveness	>93% this period	individual development plans
		Tec	nnology	Employees use of appropriate technology	Increase by 45%	Program evaluation process
	Core Valu	es: • Integrity-Based	Leadership • Ethic	s • Accountability• Commitment to Excellence	e • Citizen-Centered • Mutual Respect	

Chart Widgets

You can add a chart widget to your dashboard from the *Add Widget* menu.



Next you can choose to add a chart for a Scorecard Item, Initiative Item, or a chart that you've already created in the Reports section.



In this example we'll choose *Scorecard Item* and then choose an item to add to the dashboard.

	Scoreca	ard Item	
Q Find		Q Find	
Marketing		Financial Profit and Loss	
Customer Support		Revenue	
Sales		• Product Revenue	Add
Operations		 Training Revenue 	
Information Technology		O Book Revenue	
Human Resources		 Total Revenue 	
Commercial		> Cost of Sale	
Financial		> 🖸 Gross Profit	
* ∃ Expand All		¥∃ Expand All	

When we click *Add* a chart is added to the dashboard.



From here, you can configure your chart to show your data in a variety of ways. This is the same process as configuring charts in the Dashboards section, and both are covered in the <u>Customizing Charts</u> article.

Image Widgets

Adding an Image widget

Like all dashboard widgets, you can add an image widget from the Add Widget menu.



Or, to save time, you can just drag and drop an image file from your desktop.



Shared Images

You can manage shared images in the <u>Files section</u>, and then add those images to dashboards. To do this, just click the "Add Shared Image" link on an image widget.

	S
Constant of the second	

This opens a dialog where you can browse for images stored in the Files section. By default, everything is sorted by organization.

Images Stored in Files	Go to File
Q Find	Q Find
All images	🔥 Upload Image
Mobileworld Inc.	Background - 16x16 Layout Grid 979px wide, 680px tall
O Key Measures	Background - 8x8 Grid
O Financial	980px wide, 681px tall
Marketing	Background - Construction 980px wide, 680px tall
O Sales	Background - Faded World
O Customer Support lskajfaslkf jaslkfj aslkfj aslkfj aslkfja sklfja sklfja sklfj asklfj asklfj as	980px wide, 680px tall
O Operations	Background - Financial Grid 980px wide, 681px tall
* 🗄 Expand All	"∃ Expand All
Cancel	

If you don't know which organization your image is in, however, you can select "All Images" at the top of the organization tree. This combines all images from all organizations on the right.

Images Stored in Files		Go to Files
Q Find	Q Find	
All images	🚯 Upload Image	
Mobileworld Inc.	🗅 Example folder	2 images
O Key Measures	Evport Imaga	
O Financial	2372px wide, 1636px tall	
Marketing	IMG_4943	
○ Sales	4032px wide, 3024px tail	
O Customer Support Iskajfaslkf jaslkfj aslkfj aslkfjaslkfjasklfjasklfjasklfjasklfjasklfjasklfjas	Migrated from version 2	24 images
O Operations	Abstract - Arcitecture 980px wide, 680px tall	
ੱਚ Expand All	Expand All	
Cancel		Add

If you ever want to update the shared image later, just upload a new revision in the Files section. All of the dashboards using this shared image will automatically update.



Using Images for Backgrounds

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

Text Widgets

Overview

Text widgets are great for adding labels or titles to your dashboards. You can include text formatting, links, and even rotate them.



Outlines

You can choose an outline color for your text widget as well as the outline thickness.


Text Variables

You can use the following variables in text widgets:

- [today]
- [calendar]
- [calendar-period]
- [dashboard]
- [organization]



When you view the dashboard, these variables will be automatically replaced.

This data is valid as of Apr 8, 2019.

It is showing Monthly data for March 2019

Report Widgets

Adding a Report Widget

To add a report widget, just choose *Report* in the *Add Widget* menu.



Then choose an existing report that you've already built in the Reports section.

	Report	
Q Find	Q Find	
Mobileworld Inc.	Red Measures	
Key Measures	Downward Trending Measures Add	
O Financial	Upward Trending Measures	
O Marketing	Ad Clicks Chart	
O Customer Support	🗅 By Department	
Sales	Scorecard Structure Report	
O Operations		
O Information Technology		
Expand All	T Expand All	

This report has now been copied to your dashboard. It is no longer linked to the report that it came from. Although you can change the date range here on the dashboard, if you want to change report columns or filters, you need to do that in the Reports section and then add it to your dashboard as a new report widget.

	5			
DOWNWARD TRENDING MEASUR	5		Edit Widget	2 🌣
NAME	ORGANIZATION	OWNERS		20
Tatal Davanua	Mehilowerleine	Dela Deterror	Date Range	
Total Revenue	Mobileworld Inc.	Date Peterson	Set Report Title	
Product Revenue	Financial	Nora James		
			Font Size	14 >
Training Revenue	Financial	🔲 José González	Cell Margin Size	
Book Revenue	Financial		Background	>
Product Costs	Financial	loe Yang		
	- maneiar		Size	>
Training Venue Costs	Financial	Scott O'Reilly	Column Headers	•••• <
			Keep In Front	0
			A Look	
			LOCK	
			Duplicate	
			💼 前 Delete	

Font Size

You can change the font size for report widgets. By default, they show with a size of 14.

7					-	
MARKETING OVERVIEW REPORT				*	< Font Size	
NAME	DECEMBER 2018	JANUARY 2019	FEBRUARY 2019	MARCH 2019	10	
Google Search Position	8	7	6	5	11	
Article Mentions	11	9	9	10	11	
Twitter Mentions	49	20	26	48	13	
Freehould Dee					✓ 14	
	(2	200	264	170	16	
Number of Leads	128	131	130	133	18	
Number of Client Meetings	79	75	71	65	20	
Campaign o Mails Sont	2 512	2 444	2 4 2 2	2 442		

Here we've increased the font size so that the data inside of the table is much larger.

					-
MARKETING OVERVIEW REPORT				*	< Font Size
NAME	DECEMBER 2018	JANUARY 2019	FEBRUARY 2019	MARCH 2019	10
Google Search Position	8	7	6	5	11
Article Mentions	11	9	9	10	13
Twitter Mentions	49	20	26	48	14
Facebook Likes	72	200	264	170	18
Number of Leads	128	131	130	133	20
Number of Client	79	75	71	65	✓ 24
Meetings					26

Internal Margins

You can also choose the size the margins inside of the chart table cells. In the example below you can see the same report with Large (default), Medium, and Small margins.

	MARKETING OVERVIEW R	EPORT				MARKETING OVERVIEW REPORT	ell Margin Siz
EBRUARY MARCH 2019 2019	NAME	DECEMBER 2018	JANUARY 2019	FEBRUARY 2019	MARCH 2019	NAME DECEMBER 2018 JANUARY 2019 FEBRUARY 2019 MARCH 2019 Google Search Position 8 7 6 5	Small
6 5	Google Search Position	8	7	6	5	Article Mentions 🚩 11 🚩 9 🚩 9 🚩 10 Met	dium
	Article Mentions	F 11	9	9	10	Twitter Mentions # 49 # 20 # 26 # 48	ze
9 10	Twitter Mentions	49	20	26	48	Facebook Likes 72 200 264 170	0-
26 48	Facebook Likes	72	200	264	170	Number of Leads 128 131 130 133 Number of Client Meetings 79 75 71 65	
264 170	Number of Leads	128	131	130	133	Campaign e-Mails Sent 3,512 3,444 3,433 3,443	
130 133	Number of Client Meetings	79	75	71	65	Telesales Calls Completed 🚩 379 🚩 375 🚩 376 🚩 382	
71 65	Campaign e-Mails Sent	3,512	3,444	3,433	3,443		
3,433 3,443	Telesales Calls Completed	379	375	376	382		
376 382							
3	76 382	76 382	76 382	76 382	76 382	76 382	76 382

Notes Widgets

The notes widget allows you to see the notes for a scorecard or initiative item on your dashboard. You can add the widget from the dashboard Add Widget menu.



The default "Display As" appearance is "Abbreviated tiles." The widget shows a preview of each note, as well as an icon showing whether there are any replies.



If you click on the tile, it shows the entire note and its replies in a dialog.

If you choose the "Full notes" option, you can now see the entire note and reply text directly on your dashboard.

			✓ Full no	ites
QuickScore Administrator Posted 10 hours ago, updated 10 hours late	Applies To er March 2019 Mobileworld	Edit Balanced Scorecard	Abbreviate	ed tiles
Our warehouse is finally up and running at full ca Jane Smith for your excellent work getting the m	pacity. Special thanks to Bo achinery in place by Q1.	ob Mitchell and		
F REPLIES (0)		🕂 Add reply		
Trial User Posted 2 years ago	Applies To All Time	Edit Customer Churn		
Our churn numbers got completely out of control we're in the process of reacting to.	l in February. We had some	bad press that		
F REPLIES (1)		+ Add reply		
QuickScore Administrator a year ago, upo	dated a few seconds later			

You can choose which things you want to show for each note too. In this example, we've decided not to show the title, replies, or the editing controls.

P	O	
	*	< Showing
	QuickScore Administrator Applies To Posted 10 hours ago, updated 10 hours later March 2019 Mobileworld Balanced Scorecard	Title
	Our warehouse is finally up and running at full capacity. Special thanks to Bob Mitchell and	Controls
	Jane Smith for your excellent work getting the machinery in place by Q1.	Date 🔹
Þ.		Replies
	Trial User Applies To Posted 2 years ago All Time	Author
	Our churn numbers got completely out of control in February. We had some had press that	Calendar Period
	we're in the process of reacting to.	Scorecard Item
Ľ		Notes from Descendants

Embedded Content Widgets

Adding an Embedded Content Widget

You can add an embedded content widget from the "add widget" menu.

<u>)</u> ବ ଜ	 2			
		Add Widget		
Image	Text	Bubble	Cha	Speedometer
inear Gauge	Report	Notes	Timeline	Embedded

Then, just paste in the URL of the webpage or image that you want to see on your dashboard.



Spider Impact will then show that website or image in a resizable widget.



Sites That Prevent Embedding

It's important to note that many commercial websites <u>intentionally prevent</u> <u>themselves</u> from being displayed in other websites. Other sites require setting cookies, which don't work with embedded content. Because of this, embedded content widgets work best for content that is designed to be embedded. It's best to think of this as a widget for showing content meant for sharing, not for embedding any website on the internet.



For example, here's the "Embed a map" tab in google maps.

When we copy and paste that code, we get this:

```
<iframe src="https://www.google.com/maps/embed?pb=..."
width="600" height="450" frameborder="0" style="border:0"
allowfullscreen></iframe>
```

We only want the URL, though, so this part is all we want to paste into the embedded content widget.

https://www.google.com/maps/embed?pb=...

If, however, we went to the "Send a link" tab in google maps, we'd get a different URL that isn't designed to be embedded.



When we paste that URL into the embedded content widget, Spider Impact will show an error that looks like this.

Name		
Example Dashboard	Add Embedded Content	
G+ Move D Co		Ca
ମ କ କ ଅ ଅ	This widget shows an external webpage or image on your dashboard. It's important to note that many commercial websites intentionally block other websites from embedding their content. Try entering a URL below and we'll check if it can be embedded.	C 148
	The publisher of this website intentionally blocks other sites from embedding content at this specific URL. There may be other URLs on the site that do work, though.	
	URL Of Web Page Or Image	
	https://goo.gl/maps/gpmFbwNerJp	
	Cancel Done	

Finally, it's important to note that any URL you use has to be HTTPS, not HTTP. Spider Impact is a secure site, and web browsers prevent insecure content from being displayed in secure sites.

Disabling Embedded Content Validation

As you can see, there's a lot that can prevent a web page from showing up inside of Spider Impact. We do our best, however, to explain what's going wrong when it doesn't work. Whenever you paste a URL into an embedded content widget, we check to make sure that the content can be displayed on your dashboard.

There are some situations, however, where Spider Impact can say that you're not authorized to embed a page when you really are. For example, if you're hosing Spider Impact on your own servers (or if you use a VPN or single sign-on), it's possible that the Spider Impact server is being blocked from seeing a page even though you are not. If that's the case, you can turn off "Validate Embedded Dashboard Widgets & Briefing Slides" in Admin > Application Administration.

PERSONAL	Scheduled Exports	Notify Owners Of Parents Of Linked Items When Source Is Modified	Prevent Scorecard Item Changes This Many Days After Archive Date
🗙 Bookmarks	Imports	No *	
DESCRIPTION	Import Connections	E-Mail Size Limit (MB)	Send Support Request Emails To
 Strategy Maps 	CONFIGURATION		helpdesk@spiderstrategies.com
Dashboards	Calendars		Year-To-Date Calendar
🕒 Charts & Reports	Dataset Rollup Trees	SCORING	Yearly
Briefings	Application Administration	Scores Visible	Show Welcome Message
FOUNDATION	Server Administration	Yes 👻	Yes 👻
Scorecards	Spider Impact Databases	Ignore Gray Scorecard Items For Color Rollup	Allowed File Types (Leave Blank To Allow All)
✓ Initiatives	License Management	Yes 👻	
Datasets	MONITORING	Default For Missing Values	Hide Error Stack Traces
🗅 Files	Diagnostics	Make entire equation blank	No
	Current User Activity	Show N/A Option	Validate Embedded Dashboard Widgets & Briefing Slides
	View Log Files	Yes 👻	Yes
	Background Process Status	Scoring Type For Non-KPIs	
		3 Color 🔹	AUTHENTICATION SETTINGS
Q 🌣 🔹 🖣	•		Cancel Save

Charts & Reports

Overview of Reports

The Basics

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

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

D Mobileworld Inc.			<	Red KPIs			0 🖈 🗛 🕒 🗸 0
	Q Find			View		Edit	September 2020 👻 < >
요 Home 63 ☆ Bookmarks	+ New Report	🗅 New Folde	r	NAME	ORGANIZATION	OWNERS	SEPTEMBER 2020
PRESENTATION Dashboards	 KPI Comparis 	on Re, ort		Total Revenue	Mobileworld Inc.	Dale PetersonScott O'Reilly	\$530K
Charts & Reports	 Big Report Writer Big Report Writer 	iter		MIPRs	Financial	José González Scott O'Reilly	\$22.9K
FOUNDATION	Upward Tren	ending measures ding Measures		Book Production Costs	Financial	Scott O'Reilly	\$8,371
 ✓ Initiatives M Datasets 	🗳 Ad Clicks Cha 🗋 By Departme	rt nt		Tu el Costs	Financial	Scott O'Reilly Susan Murphy	\$325K
L Files	🗳 Scorecard Str	ucture Report		% Gross Profit	Financial	José González Scott O'Reilly	55.5%
				Salaries & Wages	Financial	Scott O'Reilly Susan Murphy	\$228K
				National Insurance	Financial	Scott O'Reilly	\$61.3K
				Marketing & Advertising	Financial	Mike Johnson Scott O'Reilly	\$51.5K
				Salas & Ganaral Admin	Financial	Nora James	¢27 7K
० ✿ ◀	*∃ Expand All	🇨 Edit	•				Mass Edit

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

SCORECARD	INITIATIVES & ADVANCE
Scorecard Item Owner/Updater Report	Initiatives Report
Annual KPI Data Report	Report Writer 3
Scorecard Structure Report	Chart Writer 4
Red KPIs Report	SQL Report 5
Missing KPI Values Report	
KPI Update Frequency Report	
KPI Comparison Report	
Scorecard Attributes Report	

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

standard Report.

Column Sorting

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

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

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

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

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

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

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

Prebuilt Scorecard Reports

New Report	n Folder		-
Red KPIs	New Report: Choose a Type		OWNERS
Downward Trending KPIs		1	
Upward Trending KPIs	SCORECARD	INITIATIVES & ADVANCED	é González
Ad Clicks Chart	Scorecard Item Owner/Updater Report	Initiatives Report	
By Department	Annual KPI Data Report	Report Writer	ntt O'Reilly
Scorecard Structure Repor	Scorecard Structure Report	Chart Writer	
	Red KPIs Report	SQL Report	rah James
	Missing KPI Values Report		
	KPI Update Frequency Report		
	KPI Comparison Report		
	Scorecard Attributes Report		
	Cancel	Next	w Only

Scorecard Item Owner/Updater Report

The owner/updater report shows all of the owners and/or updaters for the scorecard items you choose. The first step is to choose a scorecard item, and here we're choosing an entire scorecard.

ILSI (🗳 Red Measures Report		
) s	Select Scorecard Item		
] [) (Show descendants of linked items		
D E	Q Find	Q Find	
TΑ	Mobileworld Inc.	Financial Profit and Loss	
1) S	Key Measures	> 🖸 Revenue	
2 1	Financial	> 🖸 Cost of Sale	
3 0	Marketing	> 🖸 Gross Profit	
	Customer Support	> Operating Expenses	
	Sales	> Net Operating Profit	
	Operations		
	Information Technology		
	Human Resources		- 1
	Commercial		
	Cancel Back	0-0-3	Next

Next you choose what you want the report to show.

СНООЗ	E USERS OR GROUPS		
	ny User Or Group		
) s	specific Users Or Group	ps	
СНООЗ	E THE DATA TO VIEW		
Resp	onsibility Type		
Ow	ners or Updaters		•
	ncluda Maasuras Only	,	
	netude measures only		

When you're done you see a report like this.

NAME	ORGANIZATION	OWNERS	UPDATERS
Financial Profit and Loss	Financial	Nora Roberts	
Revenue	Financial	Nora Roberts	
Product Revenue	Financial	Nora Roberts	Nora Roberts Viewer Only (Communication Users)
Training Revenue	Financial		Viewer Only (Communication Users)
Book Revenue	Financial		Viewer Only (Communication Users)
Product Costs	Financial	Joe Abercrombie	
Total Gross Profit	Financial	Trial User	

Annual KPI Data Report

This is similar to the data shown on the Scorecards KPIs tab. The first step in building the report is choosing which scorecard item you want to show the KPIs for.

Dashboards	Inc. Scott O'Reilly
Select Scorecard Item	
Q Find	Q Find
Mobileworld Inc.	Mobileworld Balanced Scorecard
Key Measures	▲ Financial
Financial	Customer
Marketing	Internal Processes
Customer Support	Organizational Capacity
Sales	 Archived after May 2020
Operations	
Information Technology	
Υ∃ Expand All	*∃ Expand All
Cancel Back	
	Antonia & Bank Channes - Francisk - Carelo O'De III.

The next step is choosing what data should be shown on the report. The defaults only show the actual values and yearly totals.

nparison Report	Total R	Mobileworld	Dale Peterson
Annual	KPI Data Report	t	any
ort Write			ále
ard Trer	TIME RANGE TO DISPLAY		illy
SHOW AL	L OF 2020 -	•	HIIIy
BROKEN	DOWN BY Monthly	y -	illy
artment			rph
CHOOSE	THE DATA TO VIEW		ále
D		Actual Value	silly
Ass	gned Calendar	Score	
Ow	ner(s)	Goal	my
Upc	laters(s)	Variance To Goal	pri l
Pare	ents	📃 % Variance To Goal	illy
Sub	-KPIs	% Toward Goal	
🗌 Init	atives	Tags	501
Sco	re Influence	Yearly Totals	sitty
✓ Sho	w Abbreviated Values		
			25
Cancel	Back	Ø — Ø — 3	Finish

When you're done you'll see a report that looks like this:

🛱 Mobilewor Y	Annual KF	Pl Data F	Report									Þ	•
PERSONAL	View											Ed	lit
ည် Home 😚													
숫국 Bookmarks	KPI	JAN 2020	FEB 2020	MAR 2020	APR 2020	MAY 2020	JUN 2020	JUL 2020	AUG 2020	SEP 2020	OCT 2020	NOV 2020	D 20
PRESENTATION	Base	469K	465K	470K	465K	469K	464K	7	472K	464K	466K	463K	45
Dashboards	Funding	loon	loon		ioon		10 111				loon	loon	10
() Charts & Reports	MIPRs	\$1,250	\$4,850	\$6,650	\$10.1K	MAY 2020	\$14.7K	\$16K	\$19.7K	\$22.9K	\$25.8K	\$29.2K	\$32
Briefings	UFRs	\$43.8K	\$45.3K	\$43.2K	\$44.2K	468,500	\$45.9K	\$45.6K	\$42.1K	\$42.9K	\$40.9K	\$43.7K	\$46
FOUNDATION	Total Revenue	\$514K	\$515K	\$520K	\$520K	\$528K	\$524K	\$61.5K	\$533K	\$530K	\$532K	\$536K	\$5:
Scorecards	Net	F					F						
✓ Initiatives	Operating Profit (before tax)	\$84.4K	\$91.8K	\$88.9K	\$87.3K	\$87K	\$82.4K	\$83.3K	\$90.5K	\$88.6K	\$88.3K	\$85.5K	\$8€
DatasetsFiles	% Net Operating Profit	10.8%	10.9%	10.3%	10.6%	10.9%	10.2%	10.9%	10.6%	10.1%	10.6%	11.6%	11.

Scorecard Structure Report

The Scorecard Structure Report doesn't show any kind of performance data. It's all about the structure of your scorecard. To build the report, first choose a scorecard item. In this example we're going to choose an entire scorecard.

	😂 KPI Comparison Report	Funding	409K	4656	470K	4056	403K	4046	1 4
o s	elect Scorecard Item								\$1
Ш E	Show descendents of linked items								\$4
FOUNT	show descendants of tinked items								\$5
:: 5	Q Find		Q Fir	nd					
	Mobileworld Inc.		🔛 Mo	bileworld Bala	nced Scoreca	ırd			\$9
φι	Key Measures		7.	Financial					
D F	Financial		\rightarrow	Customer					10
	Marketing		> 🔺	Internal Proce	sses				
	Customer Support		> ▲	Organizationa	l Capacity				\$5
	Sales		o	Archived after	May 2020				.91
	Operations								
	Information Technology								3.
	Ϋ́∃ Expand All					*∃ Expand A	u		
	Cancel Back		⊘—2	3					Next 2

Then you choose what information you want to show. By default it doesn't include any of these extras.

rd Trending Me	sasures	Revenue	\$514K	\$515K	\$520K	\$520K	
rending Meas Chart	Scorecard Structure Report						
tment 1 Structure Re	CHOOSE TH	E DATA TO VIEW				.6%	
	Descrip	tion	Update	ers			
	KPI Thr	esholds S	Weight KPI Fre	t equency		23K	
	Show Abb	reviated Values					
	Cancel	Back	O O	-3	Finish	.1%	
		Google Search Position	0	0	0	0	

When you click Finish you'll see a report that looks like this.



Red KPIs Report

The Red KPIs report is probably the most popular report in Spider Impact and shows you all of your underperforming KPIs. The first step is to choose a scorecard item. Here we're going to show all red KPIs for the entire Mobileworld scorecard.

Select Scorecard Item								
Show descendants of linked items								
Q Find	Q Find							
Mobileworld Inc.	Mobileworld Balanced Scorecard							
Key Measures	> A Financial							
Financial	> 🔺 Customer							
Marketing	> 🔺 Internal Processes							
Customer Support	> 🔺 Organizational Capacity							
Sales	 Archived after May 2020 							
Operations								
Information Technology								
Y ∃ Expand All	~ 등 Expand All							
Cancel Back	✓—2 —3							

You then choose your display options. Most of the time the defaults will work just fine.

KPI Ca	nparison Repo	ort	Scorecard	Key	Objective
BR R	ed KPIs R	leport			
С ы					
🖨 Do	SELECT THE	CALENDAR PERIODS TO	DISPLAY		
¢ Uj	CALENDAR	Current Calendar 🝷			
¢ ∧.	SHOW	Current Period 🔻	TO Current Period	•	
D B)					
) sc	CHOOSE THE	DATA TO VIEW			- 1
	Id		🗸 KPI Value		
	Name		Owners		01
	Descript	tion	Updaters		
	Organiz	ation			
	Show Abbr	reviated Values			
	Cancel	Back	⊘		Finish
					al

When you click Finish you'll see a report that looks like this:

🛱 Mobilewor Y	Red KPIs Report			
PERSONAL	View		Edit Septemb	er 2020 👻 < >
숪 Bookmarks	NAME	DESCRIPTION	OWNERS	SEPTEMBER 2020
PRESENTATION Dashboards Charts & Reports	Total Revenue	This measure sums: - Product Revenue - Training Revenue - Book Revenue	Dale Peterson Scott O'Reilly	\$530K
Briefings	MIPRs	Here's a description for training revenue	José González Scott O'Reilly	\$22.9K
Scorecards	Book Production Costs		Scott O'Reilly	\$8,371
Datasets Files	Total Costs		Scott O'Reilly Susan Murphy	\$325K

Missing KPI Values Report

The Missing KPI Values Report shows you all KPIs that haven't been updated for a particular time period. To start, you need to choose a scorecard item. Here we're going to run the report for the entire Mobileworld Scorecard.

Show descendants of linked items	
Q Find	Q Find
Mobileworld Inc.	Mobileworld Balanced Scorecard
Key Measures	Financial
Financial	Customer
Marketing	Internal Processes
Customer Support	Organizational Capacity
Sales	• Archived after May 2020
Operations	
Information Technology	
★ Expand All	ΥΞ Expand All

Next you choose your display options. The defaults work great most of the time.

e .	KPI Comparison Rep	ort	NAME	DESCRIPTION	OWNERS	
orts	n Missing K	PI Values Report			ale	
e	ы				terson	
÷	SELECT THE	CALENDAR PERIODS TO DIS	SPLAY		Reilly	
•	CALENDAR	Current Calendar 🔻				
۵	SHOW	Current Period 👻 TC	Current Period 👻		onzález pott	
	B)				Reilly	
e	CHOOSE THI	CHOOSE THE DATA TO VIEW				
	🗌 Id		🗸 KPI Value		Reilly	
	🗸 Name		Owners			
	Descrip	tion	✓ Updaters		Reilly	
	Organiz	ation			Isan	
	✓ Show Abb	reviated Values			urphy	
	Cancel	Back	O - O - 3	Finis	h tott Reilly	
					Reilly	

When you're done you'll see a report like this:

🛱 Mobilewor 🗸	Missing KPI Values					
PERSONAL 요 Home <u>63</u>	View		E	dit September 202	- < >	
숪 Bookmarks	NAME	DESCRIPTION	OWNERS	UPDATERS	SEPTEMBER 2020	
PRESENTATION Dashboards	Test KPI					
🕒 Charts & Reports	КРІ			SMS Administrator		
Briefings FOUNDATION	Base Funding					
Scorecards	MIPRs	Here's a description for training revenue				
 ✓ Initiatives ✓ Datasets 	UFRs					
L Files	Production Costs					

KPI Update Frequency Report

The KPI Update Frequency Reports shows you all of your KPIs that match a particular update frequency. First we'll choose the entire Mobileworld Scorecard.

Ô	Mobileworld Inc.	Missing KPI Values Report 🛛 🛛 🛨 🔺	b- 0
	Select Scorecard Item		
	Show descendants of linked items		
	Q Find	Q Find	\supset
	Mobileworld Inc.	Mobileworld Balanced Scorecard	
0	Key Measures	▲ Financial	
	Financial	Customer	
	Marketing	▲ Internal Processes	_
	Customer Support	Organizational Capacity	_
	Sales	 Archived after May 2020 	- 18
	Operations		- 10
	Information Technology		
	र च Expand All	~∓ Expand All	
	Cancel Back	0-0 -3	Next
	🔅 📢 😤 Edit 🖌		Mass Edit

Then we'll choose which frequencies we want. In this example we'll choose Monthly.

+	New Report	D New Folder	
¢	Red KPIs	KPI Update Frequency Report	
¢	Missing KPI V		
÷	KPI Comparis	SELECT THE KPI UPDATE FREQUENCIES YOU WOULD LIKE TO DISPLAY	
¢	Report Write	Monthly Yearly	
¢	big Report V	Quarterly Weekly	
¢	Dovertard T		
1	Upward Tren	CHOOSE THE DATA TO VIEW	
¢	Ad Clicks Cha		
	By Departme	Name	
e	Scorecard St		
		Cancel Back	
		José González	

When we click Finish it shows a list of all monthly KPIs in that scorecard.

Ш́М	D Mobileworld Inc. ~				KPI Update Frequency Report						B
PERSON	IAL	Q			View				Edit	September 2020 🔻	<
소 Ho 숬 Bo	okmarks		New Report	🗅 New Folder		NAME	ID	KPI FREQUENC	Y		
	TATION	پ	Red KPIs		Total Rev	renue	1096	Monthly			
🖬 Das	shboards	*	Missing KPI Valu	ies Report	SEO Proj	ect Spend to Date	1099	Monthly			
🕒 Chi	arts & Reports	ت ده	KPI Update Freq	uency Report	Base Fun	ding	935	Monthly			
Bri	iefings	Ŭ Ŭ	KPI Comparison Report Writer m	n Report ultiple ancestors	MIPRs		936	Monthly			
🗜 Sco	orecards	۵	big Report Write	er	UFRs		937	Monthly			
🗹 Init	tiatives	÷	Downward Tren	ding Measures	Producti	on Costs	940	Monthly			
Dat	tasets	ٹ ٹ	Upward Trendin Ad Clicks Chart	ng Measures	Training	Venue Costs	941	Monthly			

>

KPI Comparison Report

The KPI comparison report is used to compare organizations that have similar KPIs. The first step in the wizard is to choose which organizations you want to see in your report. You can either select each organization one at a time, or you can automatically include an organization's descendants.



Once you've selected your organizations, the next step is to choose your KPIs. Here I've selected the scorecard root, which will automatically include all of the KPIs.
Comparison Report		
O CHOOSE KPIS	SELECTED SCORECARD ITEMS	=
Q Find	Financial Profit and Loss	✓
✓ J: Financial Profit and Loss	1	
> 🖸 Revenue		r
> Cost of Sale		
Gross Profit Operating Expenses		
Net Operating Profit		
	•	
		1
Cancel Back	0-0-3-4	Next
	Marketing & Advertising \$123K	\$14.1K \$17.2K

When we're done we see a report with all of the KPIs for each of the four selected organizations.

	NORTHEAST	SOUTHEAST	NORTHWEST	SOUTHWEST
FINANCIAL PROFIT AND LOSS				
Product Revenue	\$476K	\$448K	\$444K	\$449K
Training Revenue	\$248K	\$255K	\$257K	\$256K
Book Revenue	\$29.9K	\$38.6K	\$42.9K	\$47.1K
Total Revenue	\$754K	\$742K	\$744K	\$752K
Product Costs	\$274K	\$277K	\$274K	\$275K

Scorecard Attributes Report

The Scorecard Attributes Report doesn't show any performance information. Instead, it shows you information like the owners, updaters, and KPI frequency of multiple scorecard items at once. To run the report, all you have to do is choose a scorecard item. Here we've selected the entire Mobileworld scorecard.

ŵ	Mobileworld Inc. ~	KPI Update Frequency Report	De -
	Select Scorecard Item		
	Show descendants of linked items		
	Q Find	Q Find	
	Mobileworld Inc.	Mobileworld Balanced Scorecard	
0	Key Measures	▲ Financial	
	Financial	Customer	
	Marketing	▲ Internal Processes	
	Customer Support	Organizational Capacity	
	Sales	 Archived after May 2020 	
	Operations		
	Information Technology		
	*∃ Expand All	*∃ Expand All	
	Cancel Back	⊘ —2	sh
	🗱 📢 😤 Expand All 🎤 Edit 📢	You haven't saved this report yet Mass Edit	Save

When we click Finish, we see a report that looks like this:

D Mobileworld Inc.		Scorecard Attributes Report					P + v	
PERSONAL	Q Find	View					Edit	September 2020 👻 < >
£ Home 63 슜 Bookmarks	+ New Report D New Folder	NAME	DATA TYPE	AGGREGATION TYPE	SCORING TYPE	KPI FREQUENCY	OWNERS	UPDATERS
PRESENTATION Dashboards	 Kea KPIS Missing KPI Values Report 	Mobileworld Balanced Scorecard						
Charts & Reports	 Scorecard Attributes Report KPI Comparison Report 	Financial						
	Report Writer multiple ancestors	Increase Revenue						
 Scorecards Initiatives Datasets 	 big Report Writer Downward Trending Measures Upward Trending Measures 	Base Funding	Standard	Sum	Goal/Red Flag	Monthly	Nora James Scott O'Reilly	 Nora James Scott O'Reilly Viewer Only (Interactive Users)
D Files	 Ad Clicks Chart By Department Scorecard Structure Report 	MIPRs	Currency	Sum	Goal/Red Flag	Monthly	José González Scott O'Reilly	Scott O'Reilly Viewer Only (Interactive Users)
		UFRs	Currency	Sum	Goal/Red Flag	Monthly	Scott O'Reilly	Scott O'Reilly Viewer Only (Interactive Users)
		Total Revenue	Currency	Sum	Goal/Red Flag	Monthly	Dale Peterson Scott O'Reilly	Dale Peterson

Report Writer

Overview

The report writer is an advanced report builder that allows you to choose which columns you want to see as well as what kind of scorecard items to show.



Choosing Columns

The first step in the report writer wizard is choosing what columns you want in your report.

9	Gross Profit Finance	ial	
Report Writer: Cho	ose Columns		
rard Trending			
ks Chart	report is to choose which columns you want to s	too. Every corrected item field you choose	
below will be included in	your report as a column header.	iee. Every scorecard nem neid you choose	
d Structi			
BASICS	KPIS ONLY	PERFORMANCE	
 Name 	 KPI Frequency 	 Color 	
o Id	 Updaters 	Score	
 Description 	 Data Type 	• KPI Value	
 Scorecard Item Type 	 Aggregation Type 	 Thresholds 	
 Organization 	 Scoring Type 	 Goal 	
 Scorecard 	 Update Type 	 Variance To Goal 	
 Owners 	 Equations 	% Variance To Goal	
 Weight 	 Missing Values 	% Toward Goal	
Tags		⊙ YTD	
 General Notes 		 Period Specific Notes 	
Cancel Back		- 4 Next	

If you choose to show any of the performance columns, the next step in the wizard will ask you which dates you want to show for those performance columns. For example, if you choose to show KPIs' actual values, you'll need to choose the date range for the KPI values.

National Insura	Financial Scott (Reilly
Report Wri	iter: Choose Calendar Period Columns	
Because you you now car your report.	a chose a performance column in the previous step, a choose which calendar period columns to show in	mes
CHOOSE A CA	ALENDAR PERIOD	
CALENDAR	Monthly Relative By Date	
FROM	1 Period Earlier 🔹 TO Current Period 👻	eilly
Show Abbr	reviated Values	eilly
Cancel	Back	eilly
	Report Write Because you you now car your report. CHOOSE A CA CALENDAR TYPE FROM Show Abbr Cancel	Report Writer: Choose Calendar Period Columns Because you chose a performance column in the previous step, you now can choose which calendar period columns to show in your report. CHOOSE A CALENDAR PERIOD CALENDAR Monthly ▼ TYPE Relative By Date FROM 1 Period Earlier ▼ TO Current Period ▼ ✓ Show Abbreviated Values A Next

Row Filters

Next, you choose row filters. The idea here is that you're choosing which scorecard items you want to show. By default it's going to show every single scorecard item in the software, so we're going to want to add at lease one row filter to choose which scorecard items to show.

licks Chart		
lepartment	Report Writer: Row Filters	
recard Structure Report	The last step is to choose which scorecard items you want to show in you adding row filters. Without any filters, your report would show a row for scorecard item across all organizations. You can filter on just about anything, but some examples are:	ur report by r every
	 Specific Scorecard terms. For example, only items in two specific scorecard Name: For example, only items with "research" in their names Data type: For example, only percentage KPIs Color: For example, only items performing in the red 	
	CURRENT FILTERS	+ Add
	Cancel Back	Get Report

When you click the "add" button it stacks a second-level dialog on top to choose which row filter you want. The default row filter is "Specific Scorecard Items".

e Report	Report Writer: Add Row Filter
	Choose something that you want to filter on. This will limit your report to only showing rows for scorecard items that match your filter.
	Some types of row filters have calendar period ranges. These are different from the calendar period range you choose for columns. By keeping row filter ranges separate from column ranges, your reports can be much more flexible. For example, you can show the current performance of all KPIs that were red at any point in the last year.
	Filter On
	Specific Scorecard Items

This allows you to manually choose which scorecard items you want to see. In this example we're showing "Financial Profit and Loss" and all its descendants, as well as "Marketing" and its descendants.

+ New Report 🗅 New Folder	
Filter: Specific Scorecard Items	Cascade Include descendants of this scorecard item
ID NAME	ORGANIZATION
933 Financial Profit and Loss	Financial 🚺 📋 💆
963 Marketing	Marketing 🕕 📋 💆
Show descendants of linked items	
SCORECARD ITEM	
Q Find	Q Find
Mobileworld Inc.	🗈 Marketing
Key Performance Indicators	Improve Brand Awareness
Financial	Increase Lead Generation
Marketing	
Customer Support	
Sales	
Operations	
Information Technology	
Expand All	*∓ Expand All
•	
Cancel Back	⊘ —2

Once you have your filter set up and you click Done, the second-level dialog closes and you can see your new filter.

	Poport Writer: Dow Eilters
	report writer: Row Filters
port	 The last step is to choose which scorecard items you want to show in your report by adding row filters. Without any filters, your report would show a row for every scorecard item across all organizations. You can filter on just about anything, but some examples are: Specific scorecard items: For example, only items in two specific scorecards Name: For example, only items with "research" in their names Data type: For example, only percentage KPIs Color: For example, only items performing in the red
	CURRENT FILTERS + Add
	Specific Scorecard Items: is any of the following: Financial Profit and Loss and descendants. Marketing and descendants

Now we're going to add a second filter, this one for only showing the scorecard item type of KPI.

	Red KPIs			56%
	Downward Trending KPIs	Report Writer: Add Row Filter		
	Upward Trending KPIs			\$176K
	Ad Clicks Chart	Change consthing that you want to filter on This will limit your report to only	٣	\$68.9K
D	By Department	showing rows for scorecard items that match your filter.	۳	\$7,552
	Scorecard Structure Report	Some types of row filters have calendar period ranges. These are different from the calendar period range you choose for columns. By keeping row filter ranges separate from column ranges, your reports can be much more flexible. For example, you can	٣	\$16.4K
		show the current performance of all KPIs that were red at any point in the last year.	٣	\$62.8K
		Filter On	٣	\$34.8K
		Scorecard Item Type 🔹	٣	\$43K
		✓ Scorecard	1	\$54.3K
•		✓ Generic Item		
		✓ Key Performance Area		11
		✓ Objective	٣	0
		🗸 крі	٣	132
		Linked Item		
		Add To Existing Filter As An OR		92.8%
			1	74.1%
		Cancel	1	5.4%

As you can see here, the report will now show all financial and marketing KPIs.

Salaries & Wages	Financial	José González	
Report Writer: Row Filters			
The last step is to choose which scorecard i row filters. Without any filters, your report all organizations.	tems you want to show in your re would show a row for every score	eport by adding ecard item across	
You can filter on just about anything, but so	ome examples are:		
 Specific scorecard items: For example, on Name: For example, only items with "rese Data type: For example, only percentage labeled in the statement of the statement o	ly items in two specific scorecards arch" in their names {PIs	S	
Color: For example, only items performin	g in the red		
CURRENT FILTERS		+ Add	
Specific Scorecard Items: is any of the follo descendants, Marketing and descendants	wing: Financial Profit and Loss a	nd	
Scorecard Item Type: is any of the followin	g: KPI		
Concel Deals		Cat Danast	
Cancel Back 🗸	Customer Support	Get Report	

Viewing and Saving

When you click "Get Report" you're taken to the View tab where you can see the results of your report. Notice, however, that your report hasn't been saved yet. You may want to save it for later, but you may also just want to see its data and move on.

🛱 Mobileworld Ind	<u>c.</u> <	Report Writer				
	Q Find	View			Edit	ebruary 2020 👻 < >
☆ Bookmarks	+ New Report 🗋 New Folder	NAME	DATA TYPE	OWNERS	JANUARY	2020 FEBRUARY 2020
PRESENTATION > Strategy Maps	🗳 Red KPIs	Product Revenue	Currency	Nora Roberts Scott O'Reilly	\$400	о \$453К
Dashboards	Downward Trending KPIs	Training Revenue	Currency		\$280	к \$277К
Charts & Reports	Opward Trending KPIs Ad Clicks Chart	Book Revenue	Currency	Scott O'Reilly	\$38.5	к \$35.7K
Briefings	 By Department 	Product Costs	Currency	Norah James	\$275	к \$275К
FOUNDATION Scorecards	🐣 Scorecard Structure Report	Training Venue Costs	Currency		\$38.6	sк \$38.6К
✓ Initiatives		Book Production Costs	Currency		\$8,56	\$8,279
🗅 Files		Total Costs	Currency		\$319	к \$321К
		Total Gross Profit	Currency	View Only	\$443	к \$449К
		% Gross Profit	Percentage		55.99	% 56%
		Salaries & Wages	Currency	José González	\$180	\$176K
		National Insurance	Currency	Scott O'Reilly	\$55.7	rk 58.9K
Q 🌣 🛛 🗸	*∃ Expand All 🖍 Edit ◀	i You haven't saved this report yet				Mass Edit Save

Editing

You can change what columns and rows your chart is showing by visiting the Edit tab.



"OR" Row Filters

Row filters usually combine together with ANDs. For example, you want to see the scorecard items that match the first filter AND the second filter. You can also choose to combine filters with ORs.

Let's start with a simple report that shows all of the KPIs that are red for a month.

NAME	ORGANIZATION	OWNERS	APRIL 2018
Product Costs	Financial	Joe Abercrombie	\$278,157
Total Costs	Financial		\$327,258
Pension Contribution (3%)	Financial		\$4,969
Marketing & Advertising	Financial	David Baldacci	\$99,134
Interest & Bank Charges	Financial		\$20,962
Insurance	Financial	Joe Abercrombie	\$16,056
Office Rental	Financial	Brandon Sanderson	\$32,354

Here's what the two filters look like. The item type is KPI and the color is red.

ROW FILTERS		+ Add
Scorecard Item Type: is: KPI	Color: is Red in Current Period	

Let's say we want to change this report to show not only red KPIs, but also KPIs that are trending downward. That way we'll have a single report showing all of the KPIs we need to keep an eye on.

In order to do this, we'll add a new "downward trend" filter, and before we click "done," we'll turn on this OR filter switch on the bottom.

	R Dad Massures Depart		
DN .	Red Measures Report		
	Scorecard Item Owne	Report Writer: Add Row Filter	
	Measure Comparisor		
& Reports	🗳 Financial Overview R	Choose something that you want to filter on. This will limit your report to only	
	😂 Sales Overview Repo	showing rows for scorecard items that match your filter.	
	Marketing Overview	Filter On	Color: is Red in Current Period
	🖨 HQ Scorecard	Performance Trend -	
	Scorecard Structure		
		Trend	
		downward 👻	
		CHOOSE A CALENDAR PERIOD	
		CALENDAR Current Calendar 👻	
			-
		FROM 1 Period Earlier - TO Current Period -	
		Add To Existing Filter Ac An OD	
			t Period.
		Cancel	
		Cancer	

Now we need to choose which existing filter we're going to add our new filter to. Since we want to show all "red" or all "downward trending," we'll choose the red color filter to use with our OR.

Store New New New New New New New New New New	IND UNAL	SC FIID	Overview	Edit
Codemarks Codemarks		+ New Report	Di New Folder	
 Strategy Maps Strategy Maps Charts & Reports Financial Convolution Salus Councies Reports Salus Councies Reports Attrategy Councies Reports Reports Reports Filter On Performance Trend Trend Choose A CALENDAR PERIOD CALENDAR PERIOD Cancel Done 		Red Measures Report	Report Writer: Add Row Filter	
Charts & Reports Financial Overview Reports Charts & Reports Charts & Reports Charts & Reports Filter On Performance Trend Trend downward Choose A CALENDAR PERIOD CALENDAR Current Calendar - FROM I Period Earlier - To Current Period Period: Period:		Scorecard Item Own	Choose something that you want to filter on. This will limit your report to only	
Choose A CALENDAR PERIOD CHOOSE A CALENDAR PERIOD CHOOSE A CALENDAR PERIOD CHOOSE A CALENDAR PERIOD CALENDAR Current Calendar - FROM I Period Earlier - TO CHOOSE A FILTER Sorecard Item Type: Is: KPI Color: Is Red in Current Period	 Dashboards Charts & Reports 	Financial Overview R	Filter On	
Sconcards Sconcards Sconcards Trend downward CHOOSE A CALENDAR PERIOD CALENDAR ROM I Period Earlier Add To Existing Filter As An OR CHOOSE A FILTER Scorecard Item Type: Cancel		Sales Overview Repo Marketing Overview	Performance Trend	+ Add
Initiatives CHOOSE A CALENDAR PERIOD CALENDAR Current Calendar FROM I Period Earlier To Current Period I Add To Existing Filter As An OR CHOOSE A FiltER Scorecard Item Type: Cancel Done		HQ Scorecard	Trend	
CHOOSE A CALENDAR PERIOD CALENDAR Current Calendar FROM 1 Period Earlier TO Current Period		Scorecard Structure	downward	🖌 Edit
FROM 1 Period Earlier T Add To Existing Filter As An OR CHOOSE A FILTER Scorecard Item Type: is: KPI Color: is Red in Current Period			CHOOSE A CALENDAR PERIOD CALENDAR Current Calendar	
Add To Existing Filter As An OR CHOOSE A FILTER Scorecard Item Type: is: KPI Color: is Red in Current Period			FROM 1 Period Earlier - TO Current Period -	
CHOOSE A FILTER Scorecard Item Type: is: KPI Color: is Red in Current Period Cancel Done			Add To Existing Filter As An OR	1.10
Scorecard Item Type: is: KPI Color: is Red in Current Period Cancel Done			CHOOSE A FILTER t Period.	₽ EUR
Cancel			Scorecard Item Type: is: KPI Color: is Red in Current Period	
			Cancel	

This is what the filters look like now. This means that the report will show all items that are KPIs and (red or downward trending).

20W FILTERS	+ Add
Scorecard Item Type: is: KPI	
Color: is Red in Current Period	
Performance Trend: is trending downward between 1 F	Period Earlier and Current Period

And here's our new report.

NAME	ORGANIZATION	OWNERS	APRIL 2018
Number of Customers	Mobileworld Inc.		594
Product Costs	Financial	Joe Abercrombie	\$278,157
Book Production	Financial		\$8,121
Total Costs	Financial		\$327,258
% Gross Profit	Financial		57%
Pension Contribution (3%)	Financial		\$4,969
Marketing & Advertising	Financial	David Baldacci	\$99,134

Initiatives Report

Most reports show information about scorecard items, but the initiatives report shows you information about initiative performance.

New Report	w Folder		1
Red KPIs	New Report: Choose a Type		OWNERS
Downward Trending KPIs			
Upward Trending KPIs	SCORECARD	INITIATIVES & ADVANCED	é González
Ad Clicks Chart	Scorecard Item Owner/Updater Report	Initiatives Report	C GOTTABILI
By Department	Annual KPI Data Report	Report Writer	att O'Reilly
Scorecard Structure Repor	Scorecard Structure Report	Chart Writer	
	Red KPIs Report	SQL Report	rah James
	Missing KPI Values Report		
	KPI Update Frequency Report		
	KPI Comparison Report		
	Scorecard Attributes Report		
	Cancel	Next	w Only

The first step is to add a row filter, so we'll click the Add button.

port	Mobileworld Balanced Scorecard	
rt	Initiatives Report	
leasures	Choose which initiative items you want to show in your report by adding row You need to add at least one filter because otherwise your report would show every initiative item across all organizations.	filters. a row for
	CURRENT FILTERS	+ Add
enort	Your report needs to have at least one row filter.	
cpor c	Show Abbreviated Values	onthy
	Cancel Back 📿 📿 2	Finish

This stacks a second-level dialog on top. In this example we'll choose the "Specific Initiative Items" filter, but we could also show things like overdue initiatives.

	Initiatives Report: Add Row Filter
All Ini	
l	Choose something that you want to filter on. This will limit your report to only showing rows for initiative items that match your filter.
	Filter On
	Start Typing 🗸
	Archive Status
	Assignee
	Completion Date
	Completion Status
	Due Date
	Specific Initiative Items
	Tags

We'll then choose which initiatives we want to see.

🛍 Mobilewoi	rld Inc. Y Sco	recard Attributes Report		B
PERSONAL	Filter: Specific Initiative Items) + < >
 ☆ Bookmarks PRESENTATION ➡ Dashboards 	ID NAME All Initiatives	ORGANIZATION Financial	Ē	(RS
Charts & Repo	INITIATIVE ITEM	Q Find		
Scorecards	Mobileworld Inc. Key Measures	E All Initiatives	1	a Iy Y
DatasetsFiles	Financial Marketing Customer Support	> 📜 Build a SEO Capability		(Users)
	 Sales Operations 			Users)
	이 Information Technology ~ 두 Expand All		Υ∃ Expand All	(Users)
	Cancel Back	0-0	Do	on Iy
Q 💠	🔹 🐨 Expand All 🕜 Edit 🔹 🚺 Yo	imnersus Denfitability u haven't saved this report yet		Mass Edit Save

When we click Done the second-level dialog closes and our report is ready to be run.

rt	Scorecard	
	Initiatives Report	
	Choose which initiative items you want to show in your report by adding row filters. You need to add at least one filter because otherwise your report would show a row for every initiative item across all organizations.	r onthly
	CURRENT FILTERS + Ac	Id
	Specific Initiative Items: is any of the following: All Initiatives in Financial	onthly
	Show Abbreviated Values	
	Cancel Back	ish onthiy

After we click Finish we can see a report that look like this:

🛱 Mobilewor Y	Initiatives	Repo	ort												P + =
PERSONAL	View														Edit
<u> </u> Home <u>63</u>								ASSIGNED	MONEY						
ব্ট Bookmarks	NAME	ID	TYPE	DESCRIPTION	RELATED ITEMS	ORGANIZATION	TAGS	USERS AND GROUPS	SPENT TO DATE	TOTAL BUDGET	START DATE	DUE DATE	COMPLETION DATE	PERCENT	IS ARCHIVED?
PRESENTATION Dashboards	Research									•					
Charts & Reports	project and write a	18	Task			Financial			\$11.5K	\$15K	2019- 01-01	2019- 04-07	2019-04-07	100%	No
Briefings	report														
FOUNDATION	Status Update to	20	Milestone			Financial			\$0			2019-	2019-08-20	100%	No
Scorecards	Board								_	_	_	08-29		_	
Initiatives	Develop a web	10	T . 1			man and a		🔲 Sam	ćopov.	ADEOK	2019-	2020-		1000/	
Datasets	marketing team	19	Task			Financial	π	Smith	\$220K	\$350K	02-28	04-30	2019-10-18	100%	NO
L Files				Rick: Customer data leakage				🔲 Sam						۲	
	Migrate			corruption, or unavailability.	Improve IT Effectiveness			Smith Scott			2018-	2019-			
	Servers to Cloud	8017	Initiative	Scope: This covers internal email and application hosting	Increase	Financial	cloud,it	O'Reilly	\$140K	\$150K	07-01	12-01		95%	No
				servers.				Only							
					Improve IT							•			
				Over the next 18 months build our Search Engine	Improve			Scott			2010	2020			
Q 🌣 🖪	Build a SEO Capability	17	Initiative	Optimization (SEO) capability utilizing a mix of internal and	Market Awareness	Financial	it	View	\$232K	\$365K	2019-	2020- 04-30	2019-10-18	100%	No
_				external resources.	Improve			Only							
≣ >	i You haven't say	ved this rep	oort yet												Save

Chart Writer

Overview

Chart Writer is part of the Reports section and allows you to create charts from your Scorecard and Initiative data that look like this:



Or this:



Creating a Chart

Creating a chart is the same as creating any other report in the Reports section. Just click the *New Report* button and choose *Chart Writer*.

🛱 Mobileworld Ind	с.							0 0-	- 0
		New Report: Choose a Type				Edit	June	2021 -	
☆ Bookmarks) Strategy Maps Dashboards	+ New Report	You don't have permission to save a repor any report you create here will be discarde	t in this organization, so ed once you leave.						
🕒 Charts & Reports	Cowny rd Trending Measu	SCORECARD	INITIATIVES & ADVANCED						
🖽 Briefings	Upperd Trending Measures	Scorecard Item Owner/Updater Report	Initiatives Report						
🗄 Scorecards	Clicks Chart	Annual KPI Data Report	Report Writer						
	By Department	Scorecard Structure Report	 Chart Writer 						
🗘 Files		Red KPIs Report	1			ш			
		Missing KPI Values Report		Jan 2021	Feb 2021	Mar 2021	Apr 2021	May 2021	Jun 2021
		KPI Update Frequency Report							
		KPI Comparison Report		OCT 2020	NOV 2020		JAN 2021	FEB 2021	MAR 2021
		Scorecard Attributes Report		5.3	3.3	3.3	2.7	2.7	4
		Cancel	Heat	9.1	9.6	9.2	8.8	7.2	7.4
۹ 🗘 ۵			Next						

From here, you'll want to configure your chart to show the data you want. This is the same process as configuring charts in the Dashboards section, and both are covered in the <u>Customizing Charts</u> article.

Customizing Charts

Overview

You can <u>add charts to dashboards</u>, or charts can exist on their own <u>in the Reports</u> <u>section</u>. Although they're created in different ways, the ways you configure dashboard charts and report charts are the same.

Chart Series

A series is the data you want to graph, for example a KPI's actual value, or an Initiative's money spent. In this example we're starting completely blank with no series, so we need to add one. Let's click the "Add Series" button.

	Ad Clicks Char	ι	
Q, Find	Edit Chart	COMPARE Items -	Edit
+ New Report	CALENDAR Current Calendar 👻		
Red Measures	SHOW 12 Periods Earlier	TO Current Period -	
Downward Trending Measures			
Upward Trending Measures	+ Add	Series	
SAd Clicks Chart			
D By Department	There are no series a	added for this chart.	
Scorecard Structure Report	1		
			Dec Jan Feb Mar
	AXES		020 2021 2021 2021
	X Axis Labels 🕕		
	Y Axis Labels 🕕		OCT NOV DEC 2020 2020 2020 2
	Set Y axis range		5.3 3.3 3.3 V
			V V V V V
	Cancel Back	2 Finish	5.2 5.6 5.2

A second-level dialog stacks on top, and now we browse for the data we want to use on our chart. In this example I've selected a "Product Revenue" scorecard item, and in the Series dropdown at the bottom I can choose between graphing its "Actual Value" or "Score".

ŵ	Mobileworld Inc. <	Ad Clicks Chart	≡¢⊧
	Choose Item		dit
☆	TYPE Scorecard Item Initiative		
::	Q Find	Q Find	
	Mabileworld Inc.	Nevenue	
		O Product Revenue	
-	Key Measures	 Training Revenue 	
	Financial	O Book Revenue	
	Marketing	Cost of Sala	
::	Customer Support		
I	Sales	 Product Costs 	
0	Operations	 Training Venue Costs 	
	• operations	 Book Production Costs 	
	 Information lechnology 	 Total Costs 	
	★ Expand All	>∃ Collapse All	
	Series		
	Actual Value		
	Cancel	Done	
	🔅 🖣 🎽 Expand All		

When I click Done and the second-level dialog closes, our chart now has a series. One series is all we need, but you can continue adding more if you want to compare data from multiple things on the same chart.

	Q Find	Edit Chart COMPARE Items -	Edit June 2021 👻 < >
	+ Nev	CALENDAR Current Calendar 👻	
	Red Measures	SHOW 12 Periods Earlier - TO Current Period -	
Strategy Maps	Downward Tren		
	🗳 Upward Trendin	+ Add Series	
🕒 Charts & Reports	Ad Clicks Chart	× O PRODUCT REVENUE	
	By Department	Product Revenue (Actual Value) Change	
	Scorecard Struc	Financial	
		NAME Scorecard Item Name 🔻 COLOR 🥥 🔻	Feb Mar Apr May Jun 2021 2021 2021 2021 2021
D Files		GRAPH CINE AXIS ON RIGHT	DEC JAN FEB MAR APF 2020 2021 2021 2021 2021
			3.3 2.7 2.7 4 6
		BACKGROUND THRESHOLDS	9.2 8.8 7.2 7.4 6.8
		✓ None	
		Product Revenue	
		AXES	
		X Axis Labels 🕡	
		Y Axis Labels 🕡	
		Set Y axis range	
		Cancel Back Cancel Finish	

From here there are all kinds of things to show and configure. For example, I'm going to change my series to be a bar chart, and I'm going to show a trendline.

Ad Clicks Chart	× 🔗 PRODU	JCT REVENUE		•	
Scorecard Struc	• Prod Finan	luct Revenue (Actual Value) Icial	<u>Change</u>		ш
	NAME	Scorecard Item Name 🔻		COLOR 🥠 🔻	Feb M 2021 2
	GRAPH	•~° Line	•	AXIS ON RIGHT	DEC 2020
		∾° Line	~		1
	BACKGROUN	հ Bar			3.3
	 None 	🏥 Stacked Bar			9.2
	Product Rev	III Stacked 100% Bar			
		🛎 Area			
	AXES	🔎 Stacked Area			
	X Axis Label	Die			

When I click Finish, we get to see our chart.



Series Labels

In this example we're showing three types of revenue for a particular month.



You can choose which label to use for each bar, with options like the item name, the organization name, the series name, or a custom value that you type yourself. Each is useful in different situations, depending on what you're comparing.

BOOK REVENUE							
ා Boo Mob	k Revenue (Actual Value) ileworld Inc.	hange					
NAME	Scorecard Item Name 🔻			COLOR	• •		
CDADU	Scorecard Item Name 🗸						
GRAPH	Organization Name	•	IRENDLINE	AXIS ON R	IGHT		
	Series Name				•		
	Custom						
PRODU	CT REVENUE				•		

In this example we've given each bar a custom label that is a shortened version of its item name.



Axis Labels

You can turn off X and/or Y axis labels on dashboard charts. This example shows the default appearance with both axes turned on.



Here we've turned off the Y axis.



Being able to turn off axes is particularly useful when creating small charts that show a general overview of performance rather than specific numbers.



Y Axis Range

By default, charts automatically determine their Y axis scale based on the data that they're showing. In this example the chart range is \$0 to \$100k.



You can manually override the minimum and maximum values by choosing "set Y axis range" in the widget configuration menu. In this example we're forcing the maximum value to be \$200k.

Set Y axi	s range		
	Мах		
	200000 \$ -		
	X-WIS LEFT		0
	Auto \$ - X-AXIS IS AUTO GENERATED		Dec.
Cancel		Done	

That creates a chart that looks like this.


SQL Reports

SQL Reports allow you to write raw SQL against a database that you have set up in Admin > Import Connections.

You can include the following text in your SQL queries.

- [calendar-period-id]
- [calendar-period-start]
- [calendar-period-end]

In this example we're referencing both the calendar period start date and end date to see all of the failed logins during the current period.

0 1	Ju
Jery	
select DATE_FO	<pre>MAT(LOGINHISTORYDATE,'%Y-%m-%d %T') as TIME, LOGINHISTORYIP,</pre>
USERALIAS	
from loginhist	
from loginhisto where LOGINHIS	'ORYRESULT = 'failure'
from loginhist where LOGINHIS and LOGINHISTO	NGYRESULT = 'failure' NYDATE > [calendar-period-start]

Here are the report results for August 2019. You can see there were three failed logins.

View		E	Edit	August 201	9 🔻	< >
/-						
QUERY RESULTS (3 resu	lts returned in 0 ms)					
TIME	LOGINHISTORYIP	USERALIAS				
2019-08-04 15:24:22	104.248.165.92					
2019-08-07 09:26:57	165.225.38.234	view123				
2019-08-23 20:15:26	197.210.58.47					
2019-08-23 20:15:26	197.210.58.47					

When you change the calendar period selector to September 2019, the SQL report shows different results.

View		Edit Septe	mber 2019 👻 < >
QUERY RESULTS (2 resu	lts returned in 0 ms)		
TIME	LOGINHISTORYIP	USERALIAS	
2019-09-16 09:55:42	94.188.173.186	nir.ezry@security.com	
2019-09-20 09:34:21	109.71.122.75		

Other Sections

Overview of Initiatives

The Basics

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

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

Overview Tab

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



Changes to Key Numbers

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



Projected End Dates in the Past

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

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



Timeline Tab

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

۵×	Migrate Servers to Cloud							0 * •-	C
ম ≁	Overview Timeline								Edit
ಬ :)	Q Find	1, 2018 C	lct 1, 2018 Jan	1, 2019	Apr 1, 2019	Jul 1, 2019	Oct 1, 2019	Jan 1, 2020 M	ar 30, 2020
•	Migrate Servers to Cloud						95%		
٩	✓ ⋮ ⊟ Build a SEO Capability							76%	
ш	 Research project and write a reference 				100%				
	 Status Update to Board 							\diamond	
	Develop a web marketing team							75%	
Ľ									
Q									
₩ •	>∃ Collapse All	<						•	>

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.

^ 1	Migrate Servers to Cloud					0 * •	C
ম	Overview Timeline						Edit
మె							
:>	Q Find	Jan 1, 2019	Feb 1, 2019	Mar 1, 2019	Apr 1, 2019	May 1, 2019	Jı
	Migrate Servers to Cloud						
٩	 Build a SEO Capability 						
	Research project and write a reference of the second se				100%		
	 Status Update to Board 						₽
	 Develop a web marketing team 						
₽ ►	>∃ Collapse All		<			•	

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.

Ô٢	Migrate Servers to Cloud							• * • •	C
ন র	Overview Timeline								Edit
:>	Q Find	il 1, 2018 Oct 1, 2018	Ja	n 1, 2019 /	Apr 1, 2019	Jul 1, 2019		Oct 1, 2019	Jan 1
•	Migrate Servers to Cloud				æ			95%	
٢	✓ I Build a SEO Capability			SERVERS TO CLOUD	^	A /	0		76%
ш —	Research project and write a re		Diala Castana						
	 Status Update to Board 		Risk: Custom	er data leakage, corrupt	ion, or unavailabili	ty.			\diamond
	 Develop a web marketing team 		Scope: This c	overs internal email and	application hostin	g servers.			75
C			PROJEC 31 21 days	TED SCHEDULE	PROJEC 1.7% ut	TED TOTAL BUDGE nder budget	т		
			Overview			Add Status Upd	ate		
0									
*							_		
•	>∃ Collapse All	<						()	

Strategy Maps

Overview

Strategy Maps are similar to Dashboards, except they focus only on big-picture strategy. They have their own section in Spider Impact.



If you don't use the Balanced Scorecard methodology, there's a good change that you'll want to disable strategy maps. We explain how to do that in the <u>Choosing</u> <u>Methodology</u> article.

If you're unsure, we highly recommend reading our popular "<u>What is a Balanced</u> <u>Scorecard?</u>" article to learn more.

Creating a Strategy Map

When you create a new strategy map, you have a choice between Automatic and Blank.

When you choose Automatic, your new strategy map will start with your current organization's perspectives and objectives already on the canvas. This saves a lot of time because all you need to do is adjust the position of your objectives and draw arrows.



Adding Widgets

Adding new widgets is exactly the same as in Dashboards too. Just click the *Add Widget* button and choose an Objective or Perspective from the Scorecards section.

+ • • =			
	Add Wi	dget	
Image	Text	Objective	Perspective

You can also add <u>images widgets</u> and <u>text widgets</u>, which are the same as on dashboards.

Drawing Arrows

You can draw arrows between the objectives on your strategy maps. Just select the objective where you want the arrow to start, click on the arrow button, and drag the new arrow to another perspective.





You can even change the arrow's thickness, opacity, and dotted style.

Background Images

The <u>Dashboard and Strategy Map Backgrounds</u> article shows you how you can make strategy maps even better with background images.

Overview of Alerts

The Basics

Spider Impact is a tool that encourages communication and collaboration. It helps you stay up-to-date on how every area of your organization is performing. You and your team can browse the various application sections exploring things like dashboards and reports, but it's also incredibly helpful when Spider Impact lets you know when there's something that needs your attention. That's where Alerts come in.

Whenever you get an alert in Spider Impact, you'll get an email (unless you've turned that off). You'll also see that alert on the <u>Alerts page in the Home section</u>.

PERSONAL	Home		
		ALERTS	Edit Subscriptions
	Welcome	This screen is your alerts inbox that keeps you up to date on how everything is going.	
☆ Bookmarks	Alerts 3	······································	
PRESENTATION	KPI Updates	3 NEW ALERTS	✔ Mark all as read
Strategy Maps	My KPIs	Financial	4 months ago
Dashboards		O Total Gross Profit	Ū
🕒 Charts & Reports	My Tasks	Score is now 3 for November 2019.	
Briefings		Financial	9 months ago
FOUNDATION		Score is now 3 for May 2019.	
Scorecards		Financial	9 months ago
	•	O Total Gross Profit	
		Score is now 3 for November 2019.	
🕒 Files			A B B B
		ALERT HISTORY	Clear history
		No Alerts in History	
~ *			
<u>, </u>	4		

Application-Wide Alerts

Spider Impact works best when users have to configure as little as possible. With this in mind, there are several types of alerts that you can turn on for every user in the software.

요 Home 1	Import Connections	ALERTS
☆ Bookmarks	Scheduled Exports	Red KPIs Without Tasks
Strategy Maps	Shared Dashboards	
Dashboards	CONFIGURATION	Note Derlied Te
() Charts & Reports	CONFIGURATION	Note Replied 10
Briefings	Calendars	No ·
Scorecards	Dataset Rollup Trees	Red KPIs Upon Turning Red
✓ Initiatives	Application Administration	No ·
🕒 Files	Server Administration	KPI Update Reminders (Multiple Allowed)
	Spider Impact Databases	15 days before end of period 3 days after end of period
	License Management	Notify Owners Of Parents Of Linked Items When Source Is Modified
	MONITORING	D No -
	Diagnostics	E-Mail Size Limit (MB)
	Current User Activity	
	View Log Files	

- Red KPIs without tasks will send an alert to any KPI owner when that KPI turns red and it doesn't have an initiative related item to correct the KPI performance.
- 2. Note replied to will alert the author of any note when it gets a new reply.
- 3. **Red KPIs upon turning red** will send an alert to the KPI owner when any KPI turns red.
- 4. KPI update reminders will send out alerts to KPI updaters to remind them to update their KPI values when they haven't yet done so. In the example above, Spider Impact will send out alerts 15 days before the period is over to help people get their data in ahead of time, as well as 3 days after to remind people who have forgotten.
- 5. Notify owners of parents of linked items when source is modified will send the owners of linked scorecard items an alert when the source is edited or moved.

Finally, you can set an email size limit (6) to prevent Spider impact from attaching files larger than your email server can handle. Instead, your email will contain a link that allows you to download the file from the web.

Creating a New Alert

To create an Alert, just go to the Overview tab in the Scorecards section and click on the Alert button in the header. In this example we don't have any alerts set for the "Total Revenue" KPI, so we'll click the "Edit Alerts" button.



This opens the Edit Alerts dialog where we can add an alert for things like the Score or KPI value changing, or when someone adds a Note to this scorecard item or anything underneath it in the tree.

2620K	
Total Revenue	
MY ALERT SUBSCRIPTIONS	+ Add
You don't have any alert subscriptions for this item	Add Alert
	Score change
Cancel	KPI value change
March 2019 6 \$760K	Notes added

After you create an alert for a scorecard item, the Alert icon now turns blue. This is similar to the bookmark icon turning blue when you have a bookmark for the item.

Total Revenue		☆ ▲ -	
Overview KPIs		Alerts	ch 2019 👻 < >
		Below or equal to 500000	
PERFORMANCE	HISTORICAL PERFORMANCE	KPI Value Change	*
\$760K -\$14.8K	\$950K O	Edit Alerts	J
	\$900K		

In addition to being able to create alerts for Scorecard items, you can also subscribe to be alerted when Dashboards and Briefings are published. That's covered in the <u>Subscribing and Publishing</u> article.

Broadcast Alerts

You can manually send alert messages to specific people or teams. That's covered in the <u>Broadcast Alerts</u> article.

Managing Alerts

You can manage all of your Alerts in the My Alerts page in the Admin section, which also includes the ability to including create new Alerts.

ይ	Settings							
☆	PERSONAL	EMAIL PREFERENCES						
•	My Profile	Send me email notification	Send me email notifications					
	My Alerts	MY ALERT SUBSCRIPTIONS						
m	USERS & GROUPS	ITEM	RULE	ACTIONS				
	Users	• Product Revenue Financial	KPI value change below or equal to \$400,000	∕ ₪				
2	Groups & Permissions	Total Gross Profit						
۵	Send Broadcast Alert	• Financial	Score change below or equal to 3	1				
	DATA IMPORT & EXPORT							
	Imports							
	Import Connections							
	Scheduled Exports							
Q	Share-Lashboards							
\$ ▲	CONFIGURATION							
►	•							

By default, Spider Impact will send you an email notification immediately when you get an Alert. You can change this to send emails nightly, weekly, or never.

EMAIL PREFERENCES		
Send me email notifications	Every week on 🔻 Monday 👻	
	Never	
MY ALERT SUBSCRIPTIONS	Immediately	+ Add
ITEM	Every night	ACTIONS
• Product Revenue Financial	Every week on 🗸 qual to \$400,000	1
• Total Gross Profit Financial	Score change below or equal to 3	1

Briefings

Starting a Briefing

Briefings are collections of pages from throughout Spider Impact. They allow you to run meetings from directly within the software.

To start a briefing, go to the Briefings section, select which briefing you want, and click Start.



All of the other controls in Spider Impact slide out and you're now in full-screen briefing mode. You can advance through slides using the controls in the upper left corner.



At any point in the briefing you can click on drill-down links in your slides. This will pause the briefing and take you to that section in Spider Impact, allowing you to answer questions on the fly using the live data in the software. The entire time the briefing is paused you'll see a bar on the top of the screen with links to stop or resume the briefing on the same slide you were on before.



Adding Briefing Slides

You can add slides to a briefing by clicking on the "Send to" button in the top menu bar and choosing Briefing.



This opens a dialog with three things to choose:

🛱 Mobilewor <	Sales vs. Expenses		0 1	r 🔺	B	0
New Brief	fing Slide					
A .						
CHOOSE NA	AME C					
Slide Name	e U					
Sales vs. E	Expenses					
CHOOSE A	CALENDAR PERIOD					
Relative	By Date					
Current P	eriod 👻					
CHOOSE A	BRIEFING				+ Add	
O Find		O Find				
Mobile	world inc.	Monthly Staff Meeting				
0 Ma	rketing					
0 (11	stomer Sunnort					
O Sal	es					
0 0p	erations					
O Infe	ormation Technology					
	Ϋ́∃ Expand All	*同 Expand	HAIL			
Cancel					Save	
Cancel			_		Save	

- 1. **The slide name**. This defaults to the name of the item you're adding.
- 2. A **calendar period** for the slide. We'll explain this more below.
- 3. Which **briefing** you want to add the slide to.

When you click Save, the slide will be added to your briefing.

Editing Slides

You can edit an individual slides in the briefing section by choosing the slide you want in the slide control on the top and then going to the Edit Slide tab.



The only things to edit here are the things we set up when creating the slide, its name and calendar period.

🛱 Mobilewor <	(1 of 13) Mobileworld Strategy Map 👻 < >	Edit Briefing
PERSONAL	View	Edit Slide
<u>کد</u> Home		
숬 Bookmarks	Changes you make to a slide don't apply to the original item.	Go to Original ≯
PRESENTATION		
Strategy Maps	Slide Name	
Dashboards	Mobileworld Strategy Map	
🕒 Charts & Reports	Calendar Period	
Briefings	Relative By Date	
FOUNDATION		
Scorecards	Current Period 🔻	
✓ Initiatives		

Editing a Briefing

To edit a briefing, click the Edit Briefing button on top.



Here you can delete slides, or drag and drop them to rearrange them.

🛱 Mobilewor <		✓ Done
PERSONAL 요 Home ☆ Bookmarks	Name Monthly Staff Meeting	
PRESENTATION PRESENTATION > Strategy Maps Image: Dashboards	G→ Move D Copy Delete	Cancel Save
Charts & Reports	Mobileworld Strategy Map	
FOUNDATION	Key Measure History MOBILEWORLD INC.	Ξ
Scorecards	- Sales Pineline	
 Initiatives Files 	Effects of IT Initiatives	

Web Slides

When you're editing a briefing you can also add a Web Slide that shows content from external web pages or web apps that support embedding. This is similar to the <u>embedded content dashboard widget</u>, except that it's an entire briefing slide rather than a widget on a dashboard.

💽 < 7th Infant	ry Division (W5AAFF) <		(JA0)SRA ▼
ည် Home	Q Find	Name	
었 Bookmarks	+ New Briefing 🗅 New Folder	Spiritual Readiness Assessment Brief	
Charts & Reports	Spiritual Readiness Assessment Brief	G Move D Copy	Cancel Save
Briefings			
Scorecards		SLIDES (5)	😚 Add Web Slide
✓ Initiatives		Cavalry Troop/Cavalry Squadron (Stryker Brigade Combat Team (SBCT)	Add Web Slide
😚 Datasets		CAVALRT TROOP/CAVALRT SQUADRON (STRTKER DRIVADE COMDATTEAM (SBCT))	
🕒 Files		Cavalry Troop/Cavalry Squadron (Stryker Brigade Combat Team (SBCT) CAVALRY TROOP/CAVALRY SQUADRON (STRYKER BRIGADE COMBAT TEAM (SBCT)) E	Name
		Cavalry Troop/Cavalry Squadron (Stryker Brigade Combat Team (SBCT)	Web Address
		CAVALRY TROOP/CAVALRY SQUADRON (STRYKER BRIGADE COMBAT TEAM (SBCT)) C	Cancel
		Weapons Troop/Cavalry Squadron (SBCT) (WJMJD0)_SRA Results WEAPONS TROOP/CAVALRY SQUADRON (SBCT) (WJMJD0)	
		Headquarters and Headquarters Troop/Cavalry Squadron (Stryker Brigad HEADQUARTERS AND HEADQUARTERS TROOP/CAVALRY SQUADRON (STRYKER BRIGA	e Combat Team (SBCT)) (WJMJT0)SRA Results DE COMBAT TEAM (SBCT)) (WJMJT0)
े द 🗢 🖣	* 🗄 Expand All 🖌 🖌 Done 📢		

For example, here we're showing an embedded Google Doc that has meeting notes we want to review.

(5 of 13) 2020 Meeting Notes	• < >	Stop
Eabr	uany 2021 Internal Maatinga	
герг	Jary 2021 Internal weetings	
What's	s aoina on here?	
a web slide	area Google Doc that we ve published to the web and then added to the Briefling as	
	At's going on here? a shared Google Doc that we've published to the web and then added to the Briefing as ide. March 2020 Internal Meetings File Edit View Insert Format Tools At Share Internal text Internat	
	Share lormal text	
	New ► Open %0	
	Make a copy	
	Ν/	

Briefing Slide Calendar Periods

Throughout the software, Spider Impact has a calendar period selector in the upper right corner that shows you the period for the data that you're viewing. It works the same in dashboards as it does everywhere else. If you click the name of the calendar period on top, you can choose to view another period.



You can choose which calendar periods to show for individual slides, however. In this example, we're changing the Key Measure History slide to show data from 1 period earlier.



During your briefing, you'll this this clearly labeled on the top of your briefing. You can still change the overall calendar period selector, of course, but it's also clear both the overall change you're making and how it will affect your slide.



Similarly, you can choose to show a specific calendar period.

🛱 Mobilewor <	(4 of 13) Effects of IT Initiatives 👻 < >	Edit Briefing
PERSONAL	View	Edit Slide
산 Home ☆ Bookmarks	Changes you make to a slide don't apply to the original item.	Go to Original >
PRESENTATION		
Strategy Maps	Slide Name	
Dashboards	Effects of IT Initiatives	
🕒 Charts & Reports	Calendar Period	
Briefings	Relative By Date	
FOUNDATION		
E Scorecards	Monthly - August - 2021 -	
✓ Initiatives		
🕒 Files		

And this is what it looks like during a briefing.

(4 of 13) Effects of IT Initia	atives - < >			August	2021 (Specific Period) 🔻	< > Stop
					Actual Period August 2020	
					Slide is Specific Period:	
	MIGRATE SERVERS TO CLOUD			BUILD A SEO CAPABILI	Monthly -	
			100%		August - 2021 -	100%
	\$140K	/ř		\$350K	Back to August 2020	
	\$120K	·/i/	80%	\$300K	Show Results	80%
	\$100K	<i>ii</i>	60%	\$250K	i ,	6004

Exporting and Sharing

Exporting KPI Value Import File

You can <u>import KPI values</u> in multiple places throughout Spider Impact. Simple imports require a very specific data format for your KPI values, and you can create these files to match your existing scorecards.

Just click the "Send To" button in the menu bar on the top right, and select "KPI Value Import File." This is useful when exporting and importing KPI values, or for creating blank import files to be filled in with KPI values manually.



This will open a dialog and the first step is choosing which organizations you want to include in your file. It adds the current organization by default, so if that's all you want, just click next.

KPI Value Import File: Select Orga	anizations		
This creates an Excel file in the same format tha • Edits your existing KPI values • Updates your KPIs with new values The first step is choosing one or more organizat	it we use to import KPI values. You can open it in an ions. If you want to use the current organization, ju	app like Excel to create an import file t Ist click next.	hat:
		SELECTED ORGANIZATIONS	Ē
Q Find		Financial	0
O Your Organization		Operations	0
 Mobileworld Inc. Key Measures Financial Marketing Customer Support Sales Operations Information Technology Human Resources 		Ĩ	
Cancel	0-2		Next

The next step has more options about what to include in the import file you're creating. You'll need to choose a start and end date, and you can choose whether to include calculated values or not. Most importantly, you'll want to choose which format you want your data to be in.

"Data in Columns" has one row for every KPI, with separate columns for each date. If you're going to be manually editing the spreadsheet, this is a great option to choose. "Data in rows" puts each KPI value in a row, which means each KPI spans multiple rows. It's harder for people to edit, but it has the added benefit of including thresholds. This is a great option for exporting data that isn't going to be edited before it's imported again.

Both options are readable by Spider Impact when you're importing the scorecard. In this example we'll choose "Dates in Columns."

+ New Scorecard			_	
KE	PI Value Import File: Choose	Dates		
E Financial Profit and Los			TOTAL	JAN
Revenue			2017	2018
Cost of Sale	We'll create an import file with calendar p choose below. If you've chosen KPIs for m	eriod columns matching the date range you ore than one calendar, your import file will	5.35M	\$126K
Gross Profit	have one worksheet for each calendar.			
Operating Expenses			2.87M	\$1,262
Net Operating Profi	DATES		1004	W
S Het operating From	Start Date 5/2/2017 31	End Date 5/2/2018	5499K	\$35.1K
			3.34M	\$279K
	Include Calculated Values			,
			\$471K	\$38.9K
Ch	noose a format		91.3K	\$6.920
	Dates In Columns	Dates In Rows		
	Easier to update	Includes thresholds	\$3.9M	\$327K
				P* P
			5.27M	\$439K
				y 9
			57.4%	57.2%
	Concel Deals		1.89M	\$116K
	Jancel Back	Next		
	National	\$4,872 \$4,872 \$4,872 \$0	\$53.6K	\$0

The final step is a preview of your file before you download it. This is to make sure you've set things up properly.

PREVI	EW													
ID	MEASURE	MAY 1, 2017	JUN 1, 2017	JUL 1, 2017	AUG 1, 2017	SEP 1, 2017	OCT 1, 2017	NOV 1, 2017	DEC 1, 2017	JAN 1, 2018	FEB 1, 2018	MAR 1, 2018	APR 1, 2018	MAY 1, 2018
961	Net Operating Profit (before tax)	\$84.7K	\$82.6K	\$84.7K	\$86.2K	\$84.1K	\$83.1K	\$84K	\$80.6K	\$73.4K	\$79K	\$79.8K	\$72.3K	\$69.2K
962	% Net Operating Profit	11.1%	10.9%	11.1%	11.3%	11%	10.9%	11%	11.3%	12.1%	11.1%	12.1%	11.9%	11.2%
991	% Trainer utilization	61%	70%	71%	71%	65%	69%	71%	76.9%	82.4%	89.3%	85.3%	78.2%	71.3%
992	% Time spent at client location	38%	38%	48%	39%	42%	45%	46%	45.6%	45.4%	45%	42.1%	38.5%	40.2%
993	Average client training feedback score	84%	88%	80%	86%	96%	81%	83%	85%	82.1%	81.5%	76.8%	81.1%	74.9%
994	Number of feedback forms sent	18	22	20	21	22	18	24	24	23	23	22	22	22
995	Number of feedback forms returned	8	12	9	8	14	15	10	10	9	8	8	9	9

When you click the "Download Import File" button, it will save a spreadsheet that matches the preview. If you choose "Data in Columns" and have KPIs that use different calendars, your spreadsheet will have one worksheet for every calendar.

Exporting Scorecard Import File

You can <u>import scorecard items</u> in the Scorecards section. These imports require a very specific data format, and you can create these files to match your existing scorecards.

Just click the "Send To" button in the menu bar on the top right, and select "Scorecard Import File."



This exports a spreadsheet of your entire scorecard that is in the format required for scorecard item imports.

	А	В	С	D	E	F	G	н	I.	J	К	L	м	N	0	Р
1	Scorecard	Theme	Measure	Organization	Description	Scoring Type	Calendar	Aggregation	Data Type	Weight	Is yes good?	Are higher v	Start date	Archive date	Threshold	Threshold
2	Financial Pro	ofit and Loss		Financial							1					
3		Revenue		Financial							1					
4			Product Reve	Financial		Goal/Red Fl	Monthly	Sum	Currency		1				450,000	465,000
5			Training Rev	Financial		Goal/Red Fl	Monthly	Sum	Currency		1				255,000	260,000
6			Book Revenu	Financial		Goal/Red Fl	Monthly	Sum	Currency		1				35,000	40,000
7		Cost of Sale		Financial							1					
8			Product Cost	Financial		Goal/Red Fl	Monthly	Sum	Currency		1				275,834	275,000
9			Training Ven	Financial		Goal/Red Fl	Monthly	Sum	Currency		1				39,584	38,750
10			Book Product	Financial		Goal/Red Fl	Monthly	Sum	Currency		1				8,334	7,500
11			Total Costs	Financial		Goal/Red Fl	Monthly	Sum	Currency		1				323,750	321,250
12		Gross Profit		Financial							1					
13			Total Gross F	Financial		Goal/Red Fl	Monthly	Sum	Currency		1				422,250	432,917
14			% Gross Prof	Financial		Goal/Red Fl	Monthly	Average	Percentage		1				56.6	57.4
15		Operating Ex	kpenses	Financial							1					
16			Salaries & W	Financial		Goal Only	Monthly	Sum	Currency		1	FALSE			153,096	
17			National Insu	Financial		Goal Only	Monthly	Sum	Currency		1	FALSE			21,128	
18			Pension Cont	Financial		Goal Only	Monthly	Sum	Currency		1	FALSE			4,593	
19			Marketing &	Financial		Goal Only	Monthly	Sum	Currency		1	FALSE			49,021	
20			Sales & Gen	Financial		Goal Only	Monthly	Sum	Currency		1	FALSE			30,167	
21			Interest & Ba	Financial		Goal Only	Monthly	Sum	Currency		1	FALSE			7,542	
22			Insurance	Financial		Goal Only	Monthly	Sum	Currency		1	FALSE			15,084	
23			Office Renta	Financial		Goal Only	Monthly	Sum	Currency		1	FALSE			24,888	
24			IT & Commu	Financial		Goal Only	Monthly	Sum	Currency		1	FALSE			23,380	
25			Travel	Financial		Goal Only	Monthly	Sum	Currency		1	FALSE			13,575	
26			Amortisatior	Financial		Goal Only	Monthly	Sum	Currency		1	FALSE			15,084	
27			Total Operat	Financial		Goal Only	Monthly	Sum	Currency		1	FALSE			357,554	
28		Net Operation	ng Profit	Financial							1					
29			Net Operatir	Financial		Goal/Red Fl	Monthly	Sum	Currency		1				63,917	75,364
30			% Net Opera	Financial		Goal/Red Fl	Monthly	Average	Percentage		1				8.6	10
31																
32																

Application Administration

Choosing Methodology

Choosing Methodology Language

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

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



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

Enabling and Disabling Strategy Maps

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



Users

Overview

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

Adding Users

You can add a new user using the + button.
МЕ	Administration	USERS A +
<u>ک</u>	PERSONAL	Q Find
ম্ব	My Profile	
VIEW	My Alerts	Adam Admin
•'	USERS & GROUPS	Full User
Ğ	Users	
m	Groups & Permissions	Henry HR
DATA	Send Broadcast Alert	Ivan Interactive
	DATA IMPORT & EXPORT	
	Shared Dashboards and Strategy Maps	Pamela Power
Ľ	Scheduled Exports	
	Imports	Ursula Updater
	Import Connections	Victor Viewer
	CONFIGURATION	
	Calendars	
	Application Administration	
	MONITORING	
	Current User Activity	
0	View Log Files	
*	Background Process Status	
►	٩	

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.

NEW USER			
Username Email Addre	SS		
First Name	Middle	Last Name	
Password	Ret	ype Password	
✓ User Must Change Pa	ssword On Login		
MEMBER OF GROUPS (0)			
Add group			
ADMIN OF GROUPS (0)			
Add 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.

PERSONAL	Settings	USERS A +	
A - · ·	PERSONAL	Q Find	
な Bookmarks	My Profile	Brandon Sampson	
PRESENTATION Strategy Maps	My Alerts	Statual sampson	
Dashboards	USERS & GROUPS	Dale Peterson	
🕒 Charts & Reports	Users	Janet Montgomerv	
Briefings	Groups & Permissions		•
	Send Broadcast Alert	José González	
Scorecards	DATA IMPORT & EXPORT	Mike Johnson	
✓ Initiatives	Imports	Mike Johnson	
🕒 Files	Import Connections	Nora Roberts	
	Scheduled Exports		
	Shared Dashboards	Norah James	
	CONFIGURATION	Sam Smith	
	Calendars		
Q 🌣 🖪	4	Scott O'Reilly	

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.

	Settings	
	PERSONAL	Import Users
	My Profile	
	My Alerts	 You can upload new users or update existing users by username. Your CSV file must be same format as the example file.
	USERS & GROUPS	 Four CSF the final rave the same format as the example file. The following columns are required: username, first_name, last_name, email, nassword
	Users	New users will be required to change their password the first time they log in. Err evisiting users specifying a password will reset their password and force them
	Groups & Permissions	 To existing users, specifying a password with reset their password and roles their reset of the password and roles their reset of the password and roles their reset of the password and roles their roles their roles are the password and roles their roles their password and roles their roles their password and roles their roles their password and roles their password and roles their roles their password and roles their roles their password and roles their password and roles their roles their password and roles their roles their password and roles their password and roles their roles their password and role their password and r
	Send Broadcast Alert	The activity and a second
	DATA IMPORT & EXPORT	 The group of source of the group in the group is optional and should match a title specified in Application The title column is optional and should match a title specified in Application
	Imports	Administration The password column should be in plain text
D Files	Import Connections	You may include other columns but they will be ignored Columns may be in any order
	Scheduled Exports	
	Shared Dashboards	Download Example
	CONFIGURATION	User Import Spreadsheet
	Calendars	Select a file Browse
	Dataset Rollup Trees	Cancel David
	Annellandlan Administra	View Antor

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.

Calendars										
Dat	Dat Import Users									
App										
Ser	EXAMPLE.CSV									
	USERNAME	FIRST_NAME	MIDDLE_NAME	LAST_NAME	EMAIL	PASSWORD	GROUP_KEY			
Spie	john.peterson	John		Peterson	email@address	defaultpassword				
Lice	lacy.smith	Lacy	Anne	Smith	email@address	defaultpassword				
Dia	will.oreilly	Will		O'Reilly	email@address	defaultpassword				
Cur										
201	Cancel	Back		e	2		Import			
Viet			_		_					
Back	ground Process Statu	s	Sam Smi	th						

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.

Settings	USERS	USERS				
PERSONAL	Q Find	Q Find				
My Profile	Brandon Sa	mnson Search	Everything -			
My Alerts	Dialidon 3a	Sort by	Everything 🗸			
USERS & GROUPS	Dale Peterse	Dale Peterson				
Users			Last Name			
Groups & Permissions	Janet Mont	Janet Montgomery				
Send Broadcast Alert	Joe Yang		Full Name			
DATA IMPORT & EXPORT						
Import Connections	José Gonzá	José González				

Permissions

User permissions <u>are defined within groups</u>.

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.

NEW GROUP	
Name	
Admin	
Group Type	
Power Users	-
Permissions	
Advanced	Drganization
MEMBERS (0)	
Add member	
ADMINS (0)	

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.

New Group: Advanced Permissions

Select default Unselect all

⊙ VIEW			••• OTHER	
View All Organizations	Modify Reports		Modify Scorecard and Initiative Notes	\checkmark
Modify Bookmarks and Personal Settings	Modify SQL Console Reports		Modify Related Items	✓
Change Personal Profile			ℬ ADMINISTRATION	
O UPDATE KPIS	Modify Briefings		Create + Edit Users in Groups They Administer	
Update All Viewable KPI Actual Values	SCORECARDS & ORGANIZATIONS		Delete Users in Groups They Administer	✓
Update All Viewable Scoring Threshold Values	Modify Organizations & Scorecard Items		Modify View Organization Permissions	
	Modify Owners and Updaters		Modify All Scheduled Exports	
Edit Initiatives	Modify Scorecard Overview		Modify All Imports	
Update Initiative Status			Modify Import Connections	
Archive Initiatives	DASHBOARDS & STRATEGY MAPS Modify Dashboards and Strategy Maps		SUPER ADMINISTRATION	
	Modify All Shared Dashboards and Strategy Ma	ps 🗸	Modify Calendars	
Modify Files			Administer All Groups	
			Administer Application	

Update Users

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

New Group: Advanced Permissions

Select default Unselect all

• VIEW	••• OTHER	
View All Organizations	Modify Scorecard and Initiative Notes	
Modify Bookmarks and Personal Settings	Modify Related Items	
Change Personal Profile		
O UPDATE KPIS		
Update All Viewable KPI Actual Values		
Update All Viewable Scoring Threshold Values		
Edit Initiatives		
Update Initiative Status		
🗅 FILES		
Modify Files		

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.

New Group: Advanced Permissions

Select default Unselect all

• VIEW	••• OTHER	
View All Organizations	Modify Scorecard and Initiative Notes	
Modify Bookmarks and Personal Settings		
Change Personal Profile		

View Only

View Only users can only view things in Spider Impact.

New Group: Advanced Permissions							
	Select default	Unselect all					
O VIEW							
View All Organizations							
Change Personal Profile							

Copying Groups

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

PERSONAL	Settings	PERMISSIONS	+ Add	HELP DESK & IT S	UPPORT		
요 Home 2	PERSONAL	By Group E	By Organization	Name			
었 Bookmarks	My Profile	Q Find	Q Find		Help Desk & IT Support		
PRESENTATION Strategy Maps	My Alerts	Admin	Admin		Group Type		
Dashboards	USERS & GROUPS	POWER USERS	1	Communication Users 🔹			
Charts & Reports	Users	Demo Updaters COMMUNICATION USERS	1	Permissions			
Briefings	Groups & Permissions	Help Desk & IT Support		Advanced	Organizat	Datasets	
FOUNDATION	Send Broadcast Alert	COMMUNICATION USERS	2	MEMBERS (1)			
Scorecards	DATA IMPORT & EXPORT	Limited Updater	2	Add member			
✓ Initiatives	Imports	COMMUNICATION USERS					
🕒 Files	Import Connections	Updaters COMMUNICATION UST	5	Mike Johnson			
	Scheduled Exports	Viewer Only	1	ADMINS (1) Add admin			
	Shared Dashboards	COMMUNICATIO					
	CONFIGURATION						
	Calendars			Janet Montgomery			
Q 🌣 🖪	4	ට Copy 🗇 Delete				Cancel Save	

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).

	Admin 2	Group Type	
RS & GROUPS	Copy "Help Desk & IT Support"	Communication Users	
Jsers		Permissions	
Groups & Permissions	Please choose a name for your new group. If you want, you	Advanced Organ	
Send Broadcast Alert	can copy over the memberships and permissions from the original group using the checkboxes below.	MEMBERS (1)	
A IMPORT & EXPORT		Add member	
mport Connections	Name	Add member	
Scheduled Exports	Help Desk & IT Support Copy	Janet Montgomery	
Shared Dashboards	Also Copy		
snared bashboards	Group Members	ADMINS (1)	
FIGURATION	Group Admins	Add admin	
Calendars	Organization Permissions		
Dataset Rollup Trees	Cancel Copy & Edit Copy	Dale Peterson	
Application Administration			

Deleting Groups

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

МЕ	Administration	PERMISSI	ONS		+ Add
£	PERSONAL		By Group	By Organization	
শ্ব	My Profile	Q Find			▼ 7
VIEW	My Alerts				
•	USERS & GROUPS		Admin POWER USERS		2
Ġ	Users				
ш	Groups & Permissions		Human Resources JPDATE USERS		2
DATA	Send Broadcast Alert				
;:	DATA IMPORT & EXPORT		nteractive Users NTERACTIVE USERS		2
2	Shared Dashboards and Strategy Maps				
ß	Scheduled Exports	aps Power Users Power Users		2	
	Imports				
	Import Connections		JPDATE USERS		2
	CONFIGURATION		lieur Oralu		
	Calendars		/IEW ONLY		2
	Application Administration				
	MONITORING				
	Current User Activity				
Q	View Log Files				
\$	Background Process Status				
►	٩	ြာ Copy	🗊 Delete		

By Group vs. By Organization

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

Settings			
0	PERMISSIONS	+ Add	FORT BLISS DPW
PERSONAL	By Group By	Organization	Name
My Profile	Q fort	<u>۲</u>	Fort Bliss DPW
My Alerts	Fort Bragg UP	1	Group Type
USERS & GROUPS	COMMUNICATION USERS	-	Communication Users -
Users	Fort Bliss DES	10	Permissions
Groups & Permissions			Advanced Diganization 🖓 Datasets
Send Broadcast Alert	Fort Bliss DHR COMMUNICATION USERS	6	MEMBERS (3)
DATA IMPORT & EXPORT	Fort Bliss DPW	7	
Import Connections	COMMUNICATION USERS	,	Add member
Scheduled Exports	Fort Bliss EEO COMMUNICATION USERS	6	Mr. Al Riera
Shared Dashboards	Fort Bliss PAO	6	
	COMMUNICATION LISEDS	0	Mr. Michael Croslen

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.

Settings	PERMISSIONS	DIRECT PERMISSION (2)
PERSONAL	By Group By Organization	III Corps (Fort Hood) Updaters (Communication 🛛 🚊 🖉 🍵
My Profile	SMS Project - Q Find	Users) CASCADE PERMISSIONS
My Alerts	O Army Enterprise	Yes
USERS & GROUPS	O Army Organizations	MEMBERS (1) CPT James E. Palidar
Users	O User Workspace	ADMINS (1) CPT James E. Palidar
Groups & Permissions	O 1st Armored Division Artillery	III Corps (Fort Hood) Local Administrators (Local — / 🏦
Send Broadcast Alert	O III Corps (Fort Hood)	Administrators)
DATA IMPORT & EXPORT	O 13th ESC	Yes
Import Connections	О ннви	MEMBERS (1) CPT James E. Palidar
Scheduled Exports	O 2nd Infantry Division	ADMINS (0)
Shared Dashboards	O 3rd Infantry Division	None
CONFIGURATION	O 4th Infantry Division	CASCADING PERMISSION (2)
Calendars	O 5th Armored Brigade	CAN VIEW ALL ORGANIZATIONS (2)
	O 7th Infantry Division	

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.

Settings		
	PERMISSIONS	DIRECT PERMISSION (2)
PERSONAL	By Group By Organization	III Corps (Fort Hood) Updaters (Communication 📃 🖉 🏦 Users)
My Profile	SMS Project 👻 🔍 Find	CASCADE PERMISSIONS
My Alerts	O Army Enterprise	Yes
USERS & GROUPS	Army Organizations	MEMBERS (1) CPT James E. Palidar
1 hours	C Anny organizations	ADMINS (1)
Users	O User Workspace	CPT James E. Palidar
Groups & Permissions	O 1st Armored Division Artillery	III Corps (Fort Hood) Local Administrators (Local 📃 🦯 🏦
Send Broadcast Alert	O III Corps (Fort Hood)	Administrators)
DATA IMPORT & EXPORT	O 13th C	CASCADE PERMISSIONS Yes
Import Connections	О ннви	MEMBERS (1) CPT James F. Palidar
Scheduled Exports	O 2nd Infantry Division	ADMINS (0)
Shared Dashboards	O 3rd Infantry Division	None
CONFIGURATION	O 4th Infantry Division	CASCADING PERMISSION (2)
	O 5th Armored Brigade	SHAPD-SMS Administrator (Local Administrators)
Calendars	O 7th Infantry Division	
Application Administration	O 2ID DIVARTY (JBLM)	MEMBERS (5) Mr. Jason B. McKim, Mr. Anthony Middleton, Mr. Jordan T. Owens
MONITORING	O 2ID DIVARTY HQ	ADMINS (2) Mr. Jason B. McKim, Ms. Rose V. Holbrook
Current User Activity	O 8th Army	User Workspace Undaters (Communication Users)
View Log Files	O 9th Mission Support Command	MEMBERS (1)
Background Process Status	O 11th Armd Cav Regt RSO	Ms. Mary J. Dotson
ADVANCED	O 21st Signal Brigade Ft. Detrick	None
Tree Fixer	O 25th Infantry Division	

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

Settings	PERMISSIONS	DIRECT P
PERSONAL	By Group By Organization	
My Profile	SMS Project	Users)
My Alerts		Yes
USERS & GROUPS	Q Army Organizations	MEMBERS CPT Jam
Users	O User Workspace	ADMINS (1
Groups & Permissions	O 1st Armored Division Artillery	Cr i Jain
Send Broadcast Alert	O III Corps (Fort Hood)	Adminis
TA IMPORT & EXPORT	O 13th ESC	CASCADE Yes
Import Connections	О ннви	MEMBERS
Scheduled Exports	O 2nd Infantry Division	ADMINS (0
Shared Dashboards	O 3rd Infantry Dive	None
NEIGURATION	O 4th Infantry Division	CASCADIN
Calendars	O 5th Armored Brigade	
- Itaata a dastataka ka	O 7th Infantry Division	CAN VIEW
Application Administration	O 2ID DIVARTY (JBLM)	SMS Sys
IITORING	O 2ID DIVARTY HQ	Mr. Jason Holbrool
Current User Activity	O 8th Army	ADMINS (2
View Log Files	O 9th Mission Support Command	Mr. Cono
ackground Process Status	O 11th Armd Cav Regt RSO	SMS Adı
ANCED	O 21st Signal Brigade Ft. Detrick	MEMBERS Mr. Hank
Tree Fixer	O 25th Infantry Division	Mel J. Gi Rose V. H
SQL Console	O 62nd Medical BDE	Barry K. Mr. Jorda
	0 81st Readiness Division	ADMINS (1 Mr. Hank
	O 81st RD (Franklin)	Sgarlata,

O (81st RD) Ariel Rosario Training node
 O 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