

Using Spider Impact (Interactive)[™]

Spider Impact 5.0 User Guide Updated August 31st, 2022

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, business intelligence, and KPI and initiative management. This comprehensive guide explains how to use the software, including some of the more advanced functionality.

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

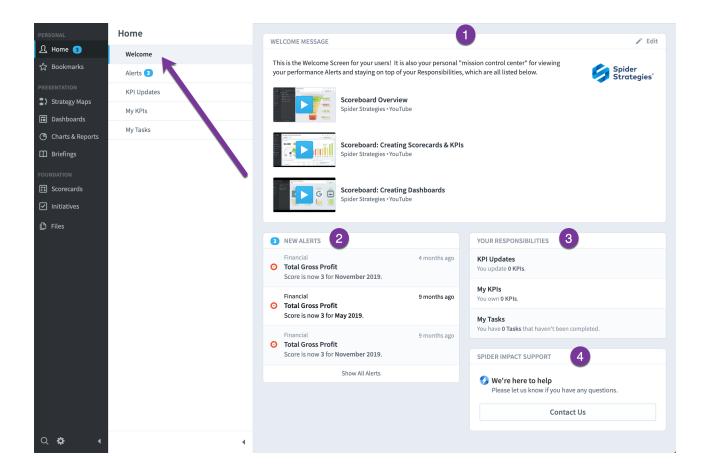
If you want to maximize your return on investment, we offer paid formal training courses and dedicated consulting engagements. Most of our customers prefer the flexibility of contracting for remote (web-based) assistance, but we also have onsite services available if they're a better match for your requirements.

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.

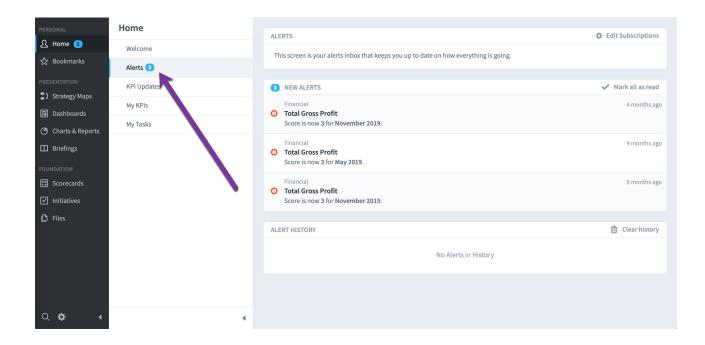
- The welcome message can be edited by an administrator and can contain a logo and videos.
- 2. You'll see your most recent alerts here. There's also a link that takes you to the alerts page that we discuss next.
- 3. You can see the number of KPIs you own and update, as well as any tasks that are assigned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



Update KPIs

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

RSONAL	Home					
Home 2	Welcome	UPDATE KPIS 👻 🏹	*			September 2021 👻 <
Bookmarks	Alerts 2	крі 1	PERIOD	N/A	KPI VALUE	2 THRESHOLDS
ENTATION	Update KPIs	FINANCIAL				
Briefings	My KPIs	Product Revenue	Contombor 2021		440,000 \$	450,000 \$ 465,000 \$
Strategy Maps	My Tasks	Floduct Revenue	September 2021		440,000 \$	450,000 \$ 465,000 \$
Dashboards Reports		Training Revenue	September 2021		\$	255,000 \$ 260,000 \$
Charts		Book Revenue	September 2021		\$	35,000 \$ 40,000 \$
NDATION						1
Scorecards						
Initiatives						

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					
요 Home 2	Welcome	0	2 KPIs 🧿	3 KPIs	0	4 KPIs
ද්≾ Bookmarks	Alerts 2					
PRESENTATION	KPI Updates	МУ КРІ	S			
Strategy Maps	M. KDIa	KPI NAM	1E	PERIOD	SCORE	ACTUAL
Dashboards	My KPIs	FINANC	IAL			
🕒 Charts & Reports	My Tasks	<u>o</u> <u>e</u>	Book Revenue	February 2020	3.8	\$35.7K
Briefings		0 1	nterest & Bank Charges	February 2020	10	\$3,617
FOUNDATION		0	lational Insurance	February 2020	0	\$68.9K
Scorecards		0	Office Rental	February 2020	10	\$9,334
✓ Initiatives		<u>o</u> <u>P</u>	Product Revenue	February 2020	4.1	\$453K
Files		MARKET	TING			
L Files		O A	Article Mentions	February 2020	2.2	11
		0	acebook Likes	February 2020	0.5	132
		0	Google Search Position	February 2020	4.4	4
		0 1	witter Mentions	February 2020	1.1	0
~ *						
० ✿ ◀	•					

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						
ည် Home 2	Welcome	1 Task	1 Task				
숝 Bookmarks	Alerts 2						
PRESENTATION	KPI Updates	MY TASKS					
Strategy Maps	My KPIs	TASK NAME	START DATE	END DATE	% COMPLETE	BUDGET SPENT	TOTAL BUDGET
Dashboards	•	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 🌣 🖪	•						

Approve KPIs

The "Require Owner Approval For KPI Value Updates" application configuration setting defaults to off.



When enabled, all updates to KPIs that have owners will go into an approval queue. KPI owners will receive an alert that they have values to approve, and they can visit the Approve KPIs screen in the Home section to do this.

PERSONAL	Home							
Ω Home 💶 🕇	Welcome	KPI	PERIOD	××	NEW VALUES	OLD VALUES	USER	
☆ Bookmarks	Alerts 1	FINANCIAL						
PRESENTATION	Update KPIs		June 2021	×	KPI Value: \$35K	KPI Value: \$25.3K	James Jones	F
 Briefings Dashboards 	Approve KPIs 11	Book Revenue	October 2021	✓ ×	KPI Value: \$35K	KPI Value:	James Jones	F
Reports	My KPIs							_
Charts	My Tasks		November 2021	××	KPI Value: \$39K	KPI Value:	James Jones	F
OUNDATION			June 2021	××	KPI Value: \$450K	KPI Value: \$442K	James Jones	F
 Scorecards Initiatives 	ards	Product Revenue	October 2021	××	KPI Value: \$450K	KPI Value:	James Jones	F
) Datasets			June 2021	××	KPI Value: \$255K	KPI Value: \$231K	James Jones	F
🖆 Forms		Training Revenue	October 2021	××	KPI Value: \$255K	KPI Value:	James Jones	F
		MARKETING						
			June 2021	××	KPI Value: 9	KPI Value: 8	James Jones	F
		Article Mentions	July 2021		KDI Valuet 10	KDLValue: 7	lamos lonos	F
Q 🗱 📢	•						Cancel	Sa

You can approve or reject all pending updates in your queue by clicking on one of the "all" buttons on the top of the list and then clicking Save.

요 Home 👥	Home							
☆ Bookmarks	Welcome	KPI	PERIOD	×	NEW VALUES	OLD VALUES	USER	
Briefings	Alerts 1	FINANCIAL	Appro	ve All New Values				
DashboardsReports	Update KPIs		June 2021	×	KPI Value: \$35K	KPI Value: \$25.3K		F
Charts	Approve KPIs 1	Book Revenue	October 2021	×	KPI Value: \$35K	KPI Value:		F
Scorecards	My KPIs		November 2021	✓ ×	KPI Value: \$39K	KPI Value:		Ē
Initiatives	My Tasks							
Datasets		Broduct Povonuo	June 2021	✓ ×	KPI Value: \$450K	KPI Value: \$442K		F
🖆 Forms 🕒 Files		Product Revenue	October 2021	✓ ×	KPI Value: \$450K	KPI Value:		F
			June 2021	×	KPI Value: \$255K	KPI Value: \$231K	James Jones	F
		Training Revenue	October 2021	×	KPI Value: \$255K	KPI Value:	James Jones	F
		MARKETING						
								¥.
० 🌣 📢	4						Cancel	Sav

You can also select individual updates to be approved or rejected.

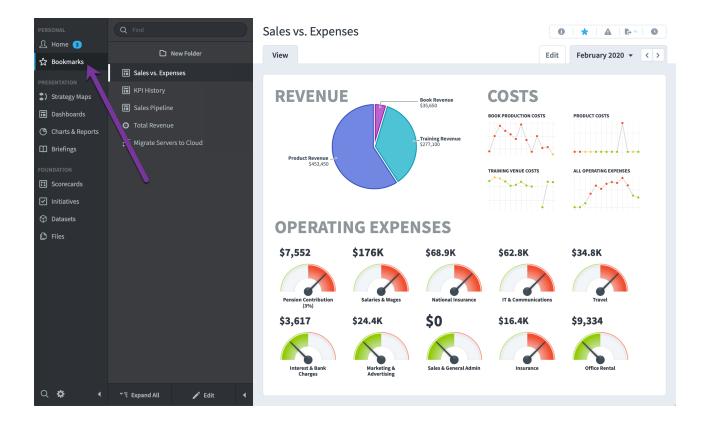
KPI	PERIOD	×	NEW VALUES	OLD VALUES	USER	
FINANCIAL						
	June 2021	×	KPI Value: \$35K	KPI Value: \$25.3K	James Jones	F
Book Revenue	October 2021	×	KPI Value: \$35K	KPI Value:	James Jones	F
	November 2021	×	KPI Value: \$39K	KPI Value:	James Jones	F
	June 2021	××	KPI Value: \$450K	KPI Value: \$442K	James Jones	Ē

If a KPI has no owners, or if its only owner is the person who updated the KPI with a new value, the update will not go into the approval queue and will instead appear immediately.

Bookmarks

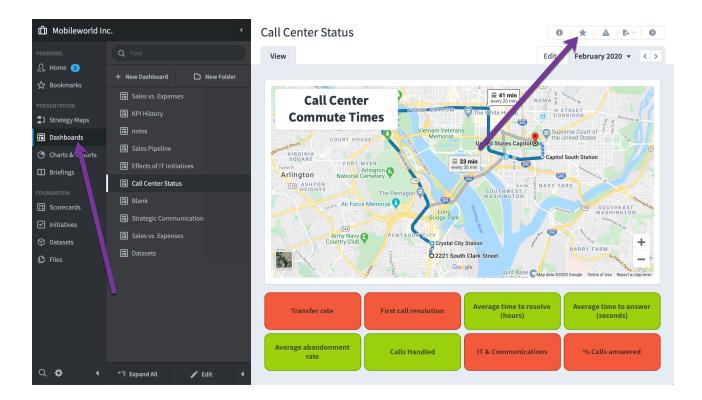
Overview

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.

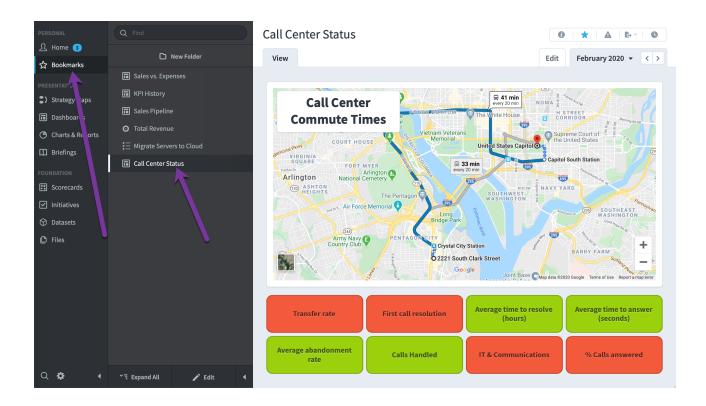


Adding a Bookmark

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

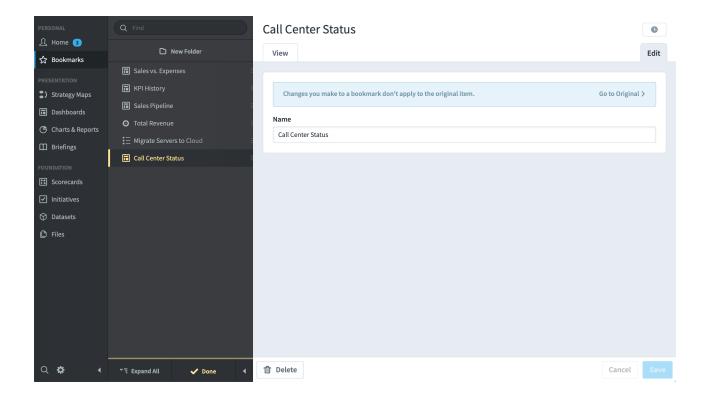


We now see that dashboard in the Bookmarks section.



Editing Bookmarks

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



Importing Data

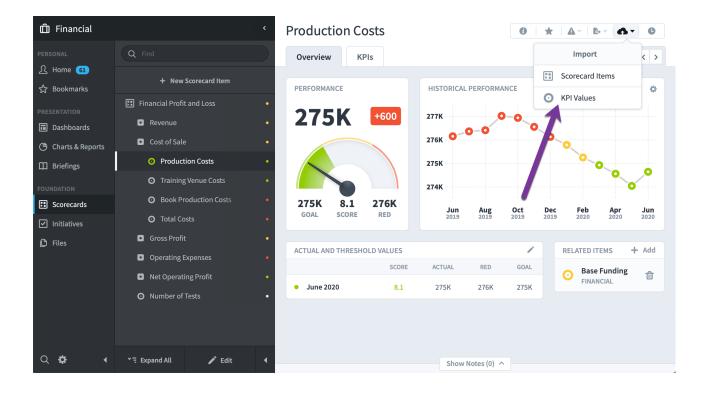
Simple Value Imports (KPIs and Initiatives)

Overview

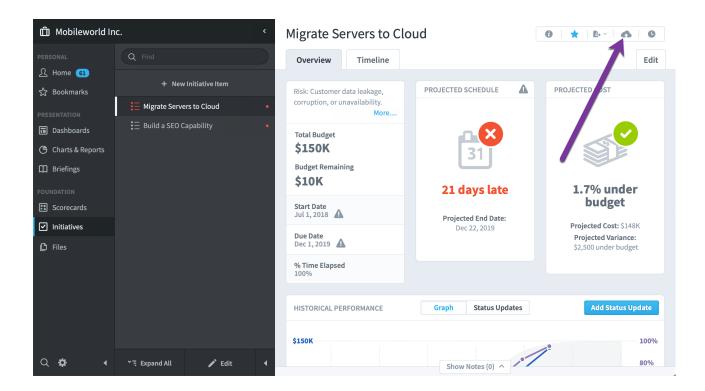
This article covers how to create a new KPI or Initiative value import, as well as how to import data that is already in a specific format. Please see the <u>Advanced</u> <u>Value Imports (KPIs and Initiatives)</u> article for how to import data in more advanced formats.

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.

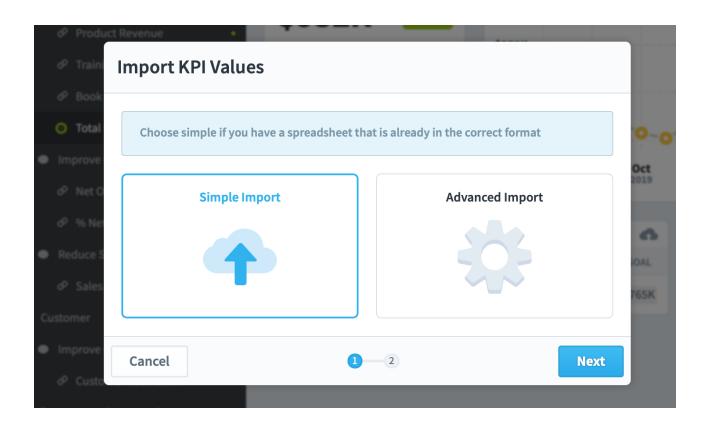


There's even an import button when updating KPI values in the Home section.

Image: Second system Image: Second system Image: Second system Melcond Image: Second system Melcond Image: Second system My KPIs Image: Second system My Tasks	5 dates	KPI UPDATES 👻 🏹 KPI FINANCIAL	PERIOD	ACTUAL	June 2020 C S June 2020 C S Th Import KPI Values
Alerts S PRESENTATION KPI Upd Strategy Maps Dashboards Charts & Reports Briefings FOUNDATION	dates		PERIOD	ACTUAL	TH. Import KPI Values
Strategy Maps My KPIs Dashboards Charts & Reports Briefings FOUNDATION		FINANCIAL			
Dashboards My KPIs My Tasks My Tasks Briefings FOUNDATION	5				
Charts & Reports My Tasks More a second secon		Product Revenue	June 2020	622,250 \$	450,000 \$ 465,000 \$
FOUNDATION	KS				
		Book Revenue	June 2020	39,100 \$	35,000 \$ 40,000 \$
		Product Costs	June 2020	274,531 \$	275,834 \$ 275,000 \$
 Scorecards Initiatives 		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	Auj
+ 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. Download Example	ш	Monthly St MOBILEWOR	
	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					
	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.						
Files	mprove Prol گ	 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 	, .	201			Apr 2020	Jun 2020
	 Reduce Sales Sales & G 	December 31st, 2020 would be 12/31/20 Download Example	0. Administrators can change this.		DAL 65K	RELATED I	TEMS -	F Add
	Customer Improve Cust	Select a file		Browse				
०.¢ ∢	E Collapse All	Cancel Back		Notes (1)				

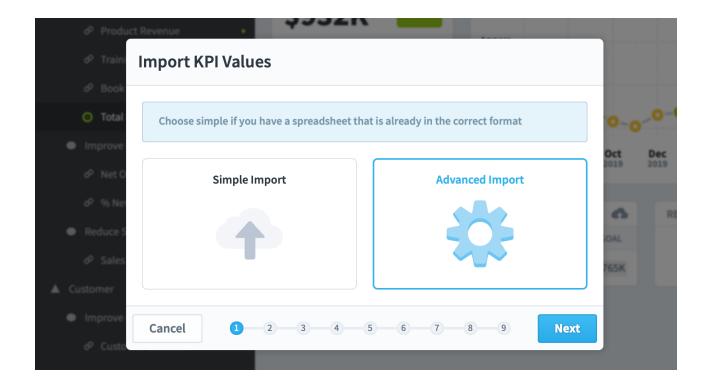
Advanced Value Imports (KPIs and Initiatives)

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...

& Train			~	\$850K			
¢ Boo	Add Import						
🧿 Tota	Choose A Data Source					0-0	
Improvi	Spreadsheet			Database		ct	Dec 2019
ଟି Net ଟି % N							
 Reduce 						6	R
🖉 Sale						ial ISK	
Customer							
Improve	Cancel Back 🕑 — 2	3	4 5	6 7 8	Next		
P Custo	mar Satisfaction St.						

... and write a SQL query. You can choose any existing database connection, or you can click "New Connection" to set up a connection to a variety of databases:

- Microsoft SQL Server
- Oracle
- MySQL
- SAP HANA
- IBM DB2

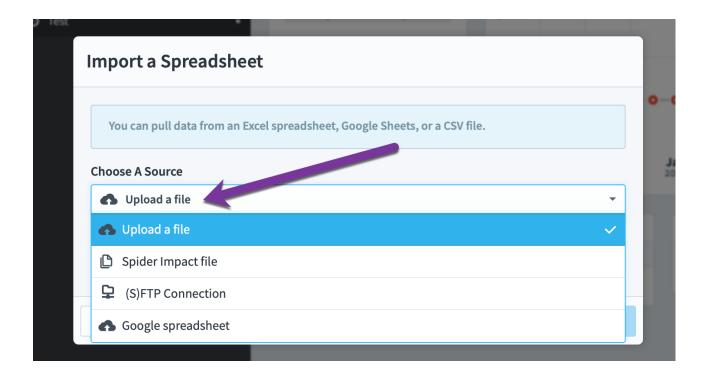
You can <u>manage all import connections</u> in the administration section.

Increase	Revenue CO22K SIGK	
& Proc	Database Connection	
& Trai		
& Boo	Use an existing Import Connection, or set up a new one.	
🗿 Tota		0-0-0
Improve	Database Connection + New Connection	oct De
& Net	HR System -	219 201
& %N	SQL Query	
Reduce	select * from personnel where userid > 150	AL.
& Sale		SSK
A Customer		
Improve		
& Cust	Cancel Back	
Improve	Customer Retention	

Or you can choose Spreadsheet...

Boo Ad	d Import			
Tota Cho	ose A Data Source			
rovi	Spreadsheet		Database	
Vet				
16 N				
uce				
Sale				
er Ca	ncel Back 📿	2 3 4 5	6 7 8	Next
rov	Dack			МЕЛС

... 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	Administra	tion		FILTER Spider Impact Adr	ninistrator				* (Cle	ar	
요 Home 🥶	PERSONAL Select Worksheet and Header Row										
PRESENTATION	My Alerts			o choose what to import. Select the header	row for your data	if there is one. A	ll rows above the	selected	+ New Impo	ort	
Dashboards	USERS & GROU	header ro	ow will be ign	hored.					0 1)	
🕒 Charts & Reports		Worksheet							0 0 1	5	
Briefings	Groups & P	scoreboard	I_Values					~			
FOUNDATION	d Broad	EXAMPLE	DATA FROM	THE SPREADSHEET					0 0 1	T	
🗱 Scorecards	DATA IMPOR	HEADER ROW	IGNORE	А	В	С	D	E	+ New Impo		
 Initiatives 	Shared Dat			Metric	Value	Threshold 1	Threshold 1	Date			
Datasets	Scheduled			test_metric_1 (2 Color)	15,491	15,491	15,491	Oct 3, 2016	O t	5	
D Files	Imports			test_metric_2 (4 Color Scored Middle)	3,181,124.4	3,181,124.4	3,181,124.4	May 18, 2019	001	7	
	Import Cor			test_metric_3 (4 Color Orange)	18,607	18,607	18,607	Jul 7, 2017			
	CONFIGURATIO			test_metric_4 (Unscored)	1	1	1	Mar 26, 2019			
	Calendars								103	Ł	
	Dataset Ro			test_metric_5 (2 Color)	114,281.6	114,281.6	114,281.6	Nov 13, 2017			
	Application			test_metric_6 (2 Color Stabilize)	0	0	0	Dec 4, 2017			
	Server Adm			test_metric_7 (2 Color Stabilize)	6,087.1	6,087.1	6,087.1	Apr 28, 2016			
	Spider Imp			· · · · · · · · · · · · · · · · ·							
	License Ma	Show All Roy	<mark>vs</mark> (May take	several minutes)							
	MONITORING	Cancel	Back	0 0 0	4 5 6	7 8	9	Next			
Q 💠 🛛 🖣	Risservalia			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.

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	1	
 Ignore rows where no metric value is specified Change threshold values from 5 to 500 	4L 5	
TRANSFORMATIONS + Add Transformation		
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 In	nc.	<	Total Revenue			0 *	A- B 63 - 0
PERSONAL	Q	Source Data					June 2020 👻 < >
요 Home 61 ☆ Bookmarks		Date Reference Dates are in a column 👻			✓ Overwrit	e Existing Values	0
 Dashboards Charts & Reports Briefings 		Your source data is below. In this step, y our best to identify the correct olumns Please see our <u>Importing KPI a</u> d Initiat	, but you may need to drag a	nd drop some of the	labels into the right		-0-0-0-0
FOUNDATION		Available Column Labels					
E Scorecards		KPI Id/Name (2) Thres	hold = Note =				
 Initiatives Files 		• KPI Id/Name (1)	Drag & Drop Labels Here	Threshold =	Threshold =	• Date =	Feb Apr Jun
		Metric	Value	Threshold 1	Threshold 1	Date	2020 2020 2020
		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	
०,¢≥ ∢) ≣ Co	Cancel Back	<u> </u>	⊘ 6 7	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 In	ic.	<	Total Reven	ue		0 *	A- D
	Q	Source Data					June 2020 👻 < 🗲
요 Home 🚳		Date Reference			Overw	vrite Existing Values	0
		Your source data is below. In this step, done our best to identify the correct co places. Please see our <u>Importing KPI ar</u>	lumns, but you may i	need to drag and drop	some of the labels in		
FOUNDATION		Available Column Labels	shold = Note =				
✓ Initiatives▲ Files		• KPI ld/Name (1) =	Value	Threshold =	Threshold =	• Date =	Feb Apr Jun 2020 2020 2020
		Metric test_metric_1 (2 Color)	Value 15.5K	Threshold 1 15.5K	Threshold 1 15.5K	Date Oct 3, 2016	LATED ITEMS + Add
		test_metric_2 (4 Color Scored Middle) test_metric_3 (4 Color Orange)	3.18M 18.6K	3.18M 18.6K	3.18M 18.6K	May 18, 2019 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	ite •	7/	14/2þ2	.0		60 31		✓ Overwrite Existing Values
Your source d	<	July			2	020 -	>	ch columns have the data you want to import. We've
done our bes places. Pleas	Su	Мо	Tu	We	Th	Fr	Sa	d to drag and drop some of the labels into the right ort article for advanced tips and tricks.
places. Fleas	28	29	30	01	02	03	04	or a fice 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	
C	26	27	28	29	30	31	01	
• KPI Id/Nam				'	·		· · · · ·	eshold E Threshold E Drag & Drop Labels Here

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

a inc.		lotal	Revenue 🔍 🗴	A · B
Q	Source Data	•		June
	Date Reference			
	Use a relative period 👻	Current Period 🔻	✓ Overwrite Existing Values	
		Current Period 🗸		
	Your source data is below. done our best to identify t	1 Period Earlier	out 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 <u>Imp</u>	2 Periods Earlier	<u>/alues</u> support article for advanced tips and tricks.	
				0-0-0
	Available Column Labels			
	KPI Id/Name (2) Valu	ie 🗧 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.

obileworld Inc.		Total Pov	00000			0-1
Source Data						
Date Reference						
Dates are in a header row	1 -				Overwrite Existing	Values
may need to drag and o	drop some of the labels into th		he data you want to import. W r I <mark>mporting KPI and Initiative \</mark>			Ц
Available Column Labe	ls					
KPI Id/Name (2) =						
• KPI Id/Name (1) =	Drag & Drop Labels Here	Drag & Drop Labels Here	Drag & Drop Labels Here	Drag & Drop Labels Here	Drag & Drop Labels Here	Dra
• KPI Id/Name (1) =	Drag & Drop Labels Here May 20, 2016	Drag & Drop Labels Here Feb 21, 2018	Drag & Drop Labels Here Nov 27, 2015	Drag & Drop Labels Here Sep 3, 2018	Drag & Drop Labels Here May 9, 2018	ł
	1					Apr
Metric test_metric_1 (2	May 20, 2016	Feb 21, 2018	Nov 27, 2015	Sep 3, 2018	May 9, 2018	Dra Apr : 16.6 3.7M

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 Contr	nue 0 * <u>A</u> - <u>B - A - 0</u>
	Destination KPIs	
오 I PRESI	On this step, choose the KPIs that you want to import data into. You can add individe add all of the KPIs underneath them.	ual 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.	E Key Performance Measures
0	Key Measures	> 🖸 Sales Pipeline
	Financial	> Customer Satisfaction
	Marketing	> Product Delivery and Effectiveness
	Customer Support	> 🖸 User and Influencer Engagement
	Sales	
	Operations	
	Information Technology	
	Ϋ́∃ Expand All	ר ∃ Expand All
	Cancel Back	
Q	★	2 YEARS AGO

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

Ô	Nobileworld Inc. <	Total Revenue	0 * 4 * 5 * 6 * 0
PERSO L	Destination KPIs		
	On this step, choose the KPIs that you want to import data int add all of the KPIs underneath them.	o. You can add individual KPIs to the list, or you can sele	ct scorecard items higher in the tree to automatically
С Ш I	UNIQUE KPIS IN IMPORT DESTINATION KPIS 181 KPIs 27 KPIs (154 missing)	Edit 27 KPIs	
FOUN S	Select KPIs	Q Find	
	Mobileworld Inc.	Key Performance Measu	Ires Add
	Key Measures Financial	Sales Pipeline Customer Satisfaction	n

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

	Denti di uni di Di							* < 3
Home 🚳	Destination KPIs							
Bookmark	On this step, choose the KPIs th add all of the KPIs underneath			u've chosen to impo emove button on the	rt data into. You can remove right.	a KPI from	in the tree to automatically	0
Dashboard			KPIS IN IMPORT	DESTINATION KPI	c			
Charts & R	UNIQUE KPIS IN IMPORT D 181 KPIs 2	181 KP		27 KPIs (154 mis				
Briefings	Select KPIs	KPIS TO	MAP DATA TO		Û	Remove All		0-0
IDATION	Q Find	ID	KPI NAME		ORGANIZATION			
Scorecards	Mobileworld Inc.	1096	Total Revenue		Mobileworld Inc.	Û	Add	
Initiatives	Key Measures	1099	SEO Project Spe	end to Date	Mobileworld Inc.	1		
Files	Financial	935	Base Funding		Financial	1		Ju 202
_ 1	Marketing	936	MIPRs		Financial	Û		
_ 1	Customer Support	937	UFRs		Financial	til de la constante de la cons		+ Ad
_ 1	Sales	940	Production Cost	ts	Financial	1		
	Operations Information Technology	941	Training Venue	Costs	Financial	Û		
	- information rechnology	942	Book Productio	n Costs	Financial	Đ		
		943	Total Costs		Financial	Û		
	Cancel Back	1590	fdfhdfh		Financial	龠	Next	

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				() · · · · · · · · · · · · · · · · · ·	Colored Hilling)		<u>A</u> -	b- 6	- 0
PERSONAL	٩	Марріі	ng				Ju	ne 2020 🔻	< >
요 Home 🚥	E R			our source data with the destination KPIs the model of the source data with the destination KPIs the model of the source of the					
Dashboards	c	ID	ORGANIZATION	SCORECARD ITEM	IMPORT				0
 Charts & Reports Briefings 	C C	1891	Test	test_metric_1 (2 Color)	test_metric_1 (2 Color)	•			
FOUNDATION	с	1892	Test	test_metric_2 (4 Color Scored Middle)	test_metric_2 (4 Color Scored Middle)	•			
 Scorecards Initiatives 	c	1893	Test	test_metric_3 (4 Color Orange)	test_metric_3 (4 Color Orange)	•			
Files	4	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)	•			/
		1898	Test	test metric 7 (2 Color Stabilize)	test metric 7 (2 Color Stabilize)	Ţ		0	HIGH 0
Q 🕹 👍		Cancel	Back	0 0 0 0	9 0 0 0	Next			
	2 hours		<i>p</i>		Show Notes (0)				

Saving and Scheduling

Your value import is now ready to run.

O test_m	actric 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 again later 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)	<u>∆</u> - b d	- O
	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	Import Name Personnel data from HR system		
E Scorecards	OWNERS		
D Files	Start Typing		
	 Nora James Brandon Sampson 	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 Edit Expand All Expand All		

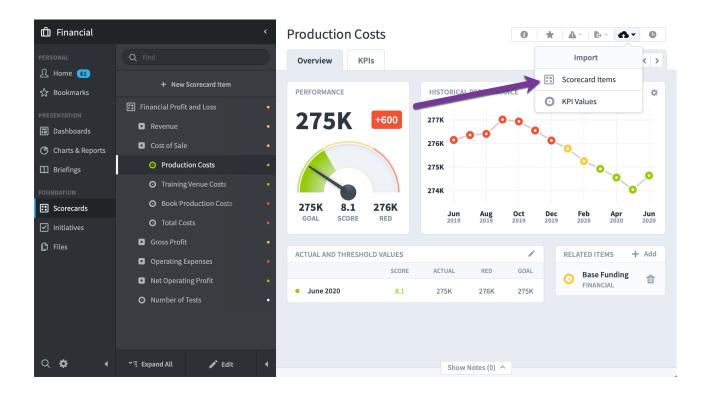
You can even schedule the import to run on a recurring basis. In this example we're going to import a new version of the data every Sunday night.

🛱 Test	 te: 	st_metric_6 (2 Color Stabilize)	* *	<u>∆</u> - B	6- 0
	Save and Schedule Import			June 2020	• < >
	If you want, you can save this import so tha	t you'll be able to quickly run it again later with new data. You can also			
	schedule it to run regularly.				
	Save Import				0
	Import Name				
	Personnel data from HR system				
😫 Scorecards	OWNERS				
D Files	Start Typing				
	Nora James		ŵ	Feb Apr 2020 202	Jun
	Rrandon Sampson		ŵ		
					1
	CHOOSE A TIME TO SCHEDULE			TARGET	HIGH
	Schedule Import			0	0
	EVERY	ON			+ Add
	WEEK -	SUNDAY -			+ 100
	↓ AT				
	2 • 00 • AM •	(UTC-04:00) AMERICA/NEW_YORK (THE SAME AS YOUR TIME ZONE)	-		
	Cancel Back 🛛 📿	Save Save	and Run		
Q 🔅 🕡	Expand All 🧪 Edit 🔺	Show Notes (0) 🔿			

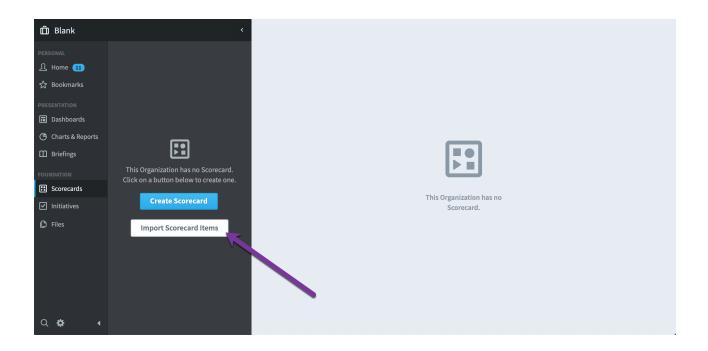
You can <u>manage imports and import connections</u> in the Administration section.

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			
This Organization has no Scorecard. Click on a button below to create one.	 You can import scorecard items using data from spreadsheet, Google Sheets, or a CSV file. You r file should have the same format as the e You can import either a full or partial scorecar Dates should be in the M/d/yy date format. Fo December 31st, 2020 would be 12/31/20. Adm can change this. If you specify more than one tag for a scoreca should be pipe delimited. For example, East Coast Sales High Priority If you specify Units for a KPI, it should match of following: Kilograms, Miles, Hours, Minutes 	example file. rd. r example, inistrators rd item, tags one of the	Eation has no ecard.	
Import Scorecard Items	Choose A Source	•		
	Select A File			
	Select a file	Browse		
	Cancel 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 step	o allows you to choo	ose what to import. The ignore o	heckboxes allow you to skip	rows that you dor	't want to import, such as row	vs containing column	headings.	
orksheet								
coreboar	d_Structure							
MAP YOU	R RESULTS					1		
Key Per	formance Area 🚊	Objective = Generic =	KPI	Threshold =				
IGNORE	Scorecard =	Key Performance Area	Drag & Drop Labels Here	Generic ≡	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				
	ws (May take severa							

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 🤑	Edit June 2020 / < >
+ New Scorecard Item	This is where you edit and create scorecard items one at a ti	me. If you want to edit many at once, use the Report Writer to
Hobileworld Scorecard •	filter for items to edit, then click the Mass Edit button. For e organization, where you can change anything, including ite	
▲ Financial • ■		
▲ Customer • 目	Name	Туре
Improve Customer Satisfaction	Improve Customer Satisfaction	Objective
 	Description	Wainka
Improve Customer Retention	· · · · · · · · · · · · · · · · · · ·	Weight
 Improve Market Awareness 	Improve customer satisfaction across both products and training	33.3%
▲ Internal Processes • 目		Advanced Options
▲ Organizational Capacity • 目		

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

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

Initiatives Files	 Tot Improv 	Add Transformatio	on		Oct 2019	Dec 2019	Feb 2020	Apr 2020	Jun 2020
	ି Ne ତି % I ● Reduc	existing KPI value, you'll transformation. For more	blank values in your import data. If you v need to choose the "by importing a blan e information on this and all of the other sformation support article.	k value"	ioal.	RE	LATED IT		- Add
	් Sal 🔺 Customer	IF Value	FILTER TYPE		765K				5
	 Improv O Cut 	→ THEN TRANSFORM by making the KPI value	is blank 🗸						
	 Improv cut 	→ Add THEN	is any						
	ෙ Improv ඒ Got	Here are a few examples that will be transformed	NUMBERS	ere are more records					
	O SEC ▲ Internal P	EXAMPLE DATA TRANSFO	number less than or equals number greater than						
	ෙ Impro ඒ Sal	Т	number greater than or equals						
	 Improv Cam 	Cancel	between numbers TEXT	Done					

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

	ø							1 1 1		0-0	0-0-0	0-0-0	0-0
	A	Add Transformatio	on										
Scorecards													
		We automatically ignore											
	● Im ¢	KPI value, you'll need to information on this and <u>support article</u> .							t 19	Dec 2019	Feb 2020	Apr 2020	Jun 2020
		IF	FILTER TYPE		NUMBER					RE	LATED IT	ems 🕂	- Add
	Rec	Value -	number l	ess than 👻	1						No rela		15
	Custor	→ THEN TRANSFORM							ĸ				
		by making the KPI valu	ie N/A 👻										
		Add THEN											
	● Im; &	Here are a few examples will be transformed.	of how tra	nsformations v	vill show up	. There a	re more	records that					
	🗢 Imj												
	¢	EXAMPLE DATA TRANSFO	RMATION	В		с	D	Е					
	o	A		в		C	U	E					
	🔺 Interni	test_metric_4 (Unscored)		0.985 to: l	N/A	1	1	Mar 26, 2019					
	• Imj &	test_metric_6 (2 Color Sta	bilize)	0.011774	to: N/A	0	0	Dec 4, 2017					
	● Imj	test_metric_10 (Goal Only	')	0.3721 to :	N/A	0.4	0.4	Oct 23, 2018					
	ø												
	ی Improv	Cancel	_					Done					

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

C DIFAS	\$400	K	and the second s	in a second second second	the second s	
Add Transformation						
We automatically ignore blank values in your import data. If you want to remove an exis importing a blank value" transformation. For more information on this and all of the oth transformation support article.					Apr Ju 2020 20	20
IF					TEMS + Ad	ld
All Records 👻					ated items	
→ THEN TRANSFORM ACTION PREFIX					acco nerris	
Metric - by prepending My						
Add THEN Here are a few examples of how transformations will show up. There are more records to	hat will be	transforme	d.			
EXAMPLE DATA TRANSFORMATION						
A	В	С	D	Е		
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) to: My 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.

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

Regular Expression Filter

+ New Sc	orecard Item		_
ileworld Ba	Add Transforma	tion	
inancial Customer		ore blank values in your import data. If you want to remove an existing measure choose the "by importing y blank value" transformation.	
nternal Proc Organization	IF Metric •	FILTER TYPE TEXT matches regular expression b[aeiou]bble	○ — ० _
	→ THEN TRANSFORM Value ←	ACTION NEW VALUE by making the value 0	'eb Mar 020 2020
	→ 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.

Regular Expression Transformation

Regular expressions are incredibly powerful for text matching, but they can also be used to transform your data. For example, let's say you have a field that has text values like this:

- 1440×900 pixels
- 1600×900 pixels
- 800×600 inches

And you want to convert it to values like this:

- Width: 1440×Height: 900 pixels
- Width: 1600×Height: 900 pixels
- Width: 800×Height: 600 inches

You can do this by choosing the "matches regular expression" filter type and writing a regular expression with groups. You can then manipulate the groups as separate transformations.

Add Transformation IF FILTER TYPE Customer ID matches regular Hen TRANSFORM 1st group in the regular expression Hen TRANSFORM 2nd group in the regular expression	ACTION	R EXPRESSION]+)×([0-9]+)/ PREFIX Width: PREFIX	圃	fotal Dis
Customer ID matches regular THEN TRANSFORM 1st group in the regular expression THEN TRANSFORM	ACTION)+)×([0-9]+)/ PREFIX Width:	甸	fotal Di
→ THEN TRANSFORM South State So	ACTION by prepending ACTION	PREFIX Width:	甸	fotal Di
1st group in the regular expression → THEN TRANSFORM	✓ by prepending ✓ ACTION	Width:	۵	
	ACTION		Ē	
		PREFIX		
2nd group in the regular expression	by prepending			
	by prepending	Height:	Û	
→ Add THEN Here are a few examples of how transfo	rmations will show up. There a	re more records that will be transformed.		GORIES (SES
EXAMPLE DATA TRANSFORMATION				
	There is no transformation of	data to show		no ranj
				o categ
Cancel			Done	o catego
	Here are a few examples of how transfor EXAMPLE DATA TRANSFORMATION	Here are a few examples of how transformations will show up. There a EXAMPLE DATA TRANSFORMATION There is no transformation	Here are a few examples of how transformations will show up. There are more records that will be transformed. EXAMPLE DATA TRANSFORMATION There is no transformation data to show Cancel	Here are a few examples of how transformations will show up. There are more records that will be transformed. EXAMPLE DATA TRANSFORMATION There is no transformation data to show Cancel Done

"By converting to date" Transformation

Spider Impact does a great job of <u>turning text into dates on its own</u>, but sometimes you'll need to give it a push in the right direction when your source data isn't in a common format. The "by converting to a date" filter turns text into dates by telling the software where to find the day, month, and year.

Ô	tabilawarld	Inc Exampl	le.		C Fale	on Caland	Data						
PERSO	Add Trar	nsformatio	on										
<u>₽</u> +	IF												
¢2 €	All Record	s 👻											
RESE	L→ THEN TRA	NSFORM	ACTION		SOURCE D	ATE FORMAT							
E		ew Cust 👻	by converting	to date 👻	m/d/y								
2) s													
	→ Add TH	EN											
III R	Here are	a few examples	s of how transfor	mations will	show up. There a	are more record	s that will be t	ransformed.					
•													
OUNI	EXAMPLE	DATA TRANSFO	RMATION										
:: s	PAYMENT FORM	CUSTOMER	ACCOUNT OWNER	HOSTED	PRODUCT	CUSTOMERS PAYING	RENEWAL	SALE VALUE	ANNUAL	DATE	DATE NEW	PM UNIT	РМ
v 1	FORM	COSTOMER	OWNER	HUSTED	PRODUCT	MONTHLY	RENEWAL	SALE VALUE	ANNUAL MAINT \$	CANCELLED	CUST	PRICE	USER
9 c											12/13/18		
E F	Credit	3Com	Benjamin	Hosted	QuickScore	1		165.508499497896			to: Dec		
D F	Card	Corp	Himmelfarb		- Hosted						13, 2018		
											11/18/18		
		3M	Beniamin		OuickScore		2018-				Acc Mary		
0	Cancel												Done
							- citette		4				

Days, months, and years are represented by the following characters:

- d
- m
- y

To separate the days, months, and years, any number of the following characters can be used

- space()
- hyphen (-)

- comma (,)
- forward slash (/)

For example, if your dates look like *5/15/2020*, you'd use *m/d/y* for the source date format. If your dates look like *3-Mar-19*, you'd use *d-m-y* for the source date format. As long as you tell Spider Impact where to find the data, it's smart enough to determine that Jan, January, and 1 are the same thing.

There are times, of course, where you'll come across date formats that Spider Impact can't parse on its own. For example, February 20th, 2018 could be stored as *022018*, but there's no way for the software to automatically determine which numbers match to which parts of the date. In these situations, you can apply regular expression transformations to the data before converting it to a date.

Here we:

- 1. Start with text like *022018*
- 2. Convert it to text like *02-20-18*
- 3. Parse it into a date with m-d-y

Add Transforr	nation				
F	FILTER TYPE		REGULAR	EXPRESSION	
Sale Date	▼ matches regular	expression	▼ ()()())	
→ THEN TRANSFORM		ACTION		SUFFIX	
1st group in the	regular expression 👻	by appen	ding 👻	-	Û
→ THEN TRANSFORM		ACTION		SUFFIX	
2nd group in th	e regular expression 👻	by appe	nding 👻	-	٦
→ THEN TRANSFORM	ACTION		SOURCE DATE	FORMAT	
Sale Date	- by converting to	date 🝷	m-d-y		1

Importing Date and Time Fields

Overview

Date fields are used in almost every type of import. For example, KPI value imports require a date field, initiative imports have start dates, and datasets can have date or time fields. If your date fields are coming from a single field in a database or Excel spreadsheet, it's easy for Spider Impact to know how to import the date.

When your dates are coming from a text format like CSV or JSON, however, or when they're the result of combining multiple fields, things can get a little more tricky. That's because different countries and languages store dates differently, and Spider Impact doesn't have any clues from the source file to determine how to read the dates. In these situations, the software goes through a specific order of possible date formats, many of which are unique to each locale.

Don't worry, you probably won't have to even think about this. If you try to import dates that look good to you, there's a good chance Spider Impact will be able to import them. For the sake of transparency, however, here are the full details of how Spider Impact imports dates.

Details

Attempt 1: Bulgaria

If the user's browser locale is set to Bulgaria, Spider Impact will first attempt to parse text like 01.25.2021 as January 14th, 2022. If the user isn't from Bulgaria or the text isn't in that specific format, the software will continue to attempt 2.

Attempt 2: Browser locale-based formats

For most users, the first thing that Spider Impact tries when trying to turn text into a date is Java's built-in date parsing. It looks at the user's browser to determine their locale, and then asks Java to treat the text as a date for that locale.

There are four formats for each locale: Full, Long, Medium, and Short. For example, here is the date January 14th, 2022 for each of the formats for the United States locale.

	Date	Time	Datetime
Full	Friday, January 14, 2022 AD	3:46:00pm EST	Friday, January 15, 2022 at 1:12:45 PM Eastern Standard Time
Long	January 14, 2022	3:46:00 PM EST	January 14, 2022 at 1:46:00 PM EST
Medium	Jan 14, 2022	3:46:00 PM	Jan 14, 2022, 15:46:00 PM
Short	01/14/22	3:46 PM	1/14/22, 3:46 PM

Java supports over 4,000 locales, so we've put together a spreadsheet with examples for every locale.

http://resources.spiderstrategies.com.s3.amazonaws.com/docs/date_time_by_locale.csv

Attempt 3: Specific formats

If none of the locale-based formats match the text, Spider Impact will then attempt to parse the text using this specific list of formats. We're continuing to use January 14th, 2022 as an example. Missing year is assumed to be current year.

Dates

1/14/22 01/14/22 1/14/2022 01/14/2022 1/14

01/14 1-14-22 01-14-22 1-14-2022 01-14-2022 2022-1-14 2022-01-14 1-14 01-14 jan 14, 2022 Jan 14, 2022 JAN 14, 2022 jan 14 2022 Jan 14 2022 JAN 14 2022 MMM-d-yyyy jan-14-2022 Jan-14-2022 JAN-14-2022 January 14, 2022 january 14, 2022 January 14 2022 january 14 2022 jan 14 Jan 14 **JAN 14** January 14 january 14 14 January 2022 14 january 2022 14-jan-2022 14-Jan-2022 14-JAN-2022

Times

3:46 pm 3:46 PM 3:46:00 pm 3:46:00 PM 03:46 pm 03:46 PM 03:46:00 pm 03:46:00 PM 15:46 15:46:00 15:46:00.0 15:46:00.00 15:46:00.000 15:46:00.0000 15:46:00.00000 15:46:00.000000

Datetimes

To create a Datetime field, Spider Impact combines any of the date formats with any of the time formats. The date and time is separated by either a [space] or T.

1-14-2022T15:46:00 1-14-2022 15:46:00

Attempt 4: No day of the month formats

If the date doesn't match any of the formats specified above, Spider Impact tries the following formats, assuming that it is the first day of the month. We're using January 2022 as an example. 1-2021 01-2021 1/2021 01/2021 2021-1 2021-01 2021/01 Jan 2021

Attempt 5: ISO 8601 date format

If none of the date formats match, Spider Impact will attempt to parse the dates as <u>ISO 8601</u>. This is a well-defined format, but here are some examples for January 14th, 2022.

2022-01-14 2022-01-14T15:46:00+00:00 2022-01-14T15:46:00Z 20220114T154600Z

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					
☆	Shared Dashboards and Strategy Maps	FILTER SUCCESS		•	≪ 0	lear
:)	Scheduled Exports	KPI VALUES		+ 1	New In	port
•	Imports	Customer Returns	Expand	•	•	A
٩	Import Connections	O'Reilly, Scott	Lxpanu		63	
	CONFIGURATION	Holiday party demo Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale	Expand	0	6	Û
	Calendars	HR System Import	Expand	•		A
	Dataset Rollup Trees	Administrator, Scoreboard	Expand		63	
Ċ	Application Administration	Inventory Montgomery, Janet, O'Reilly, Scott, Peterson, Dale	Expand	C	6	1
	Server Administration	🕞 Weekly stats update		-		
	Spider Impact Databases	Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale, Sampson, Brandon 🖉 🔧 🔧	Expand	O	0	Û
	License Management	INITIATIVE STATUS		<u>н</u> ,	lew In	aport
Q	MONITORING		2	-	1010	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.

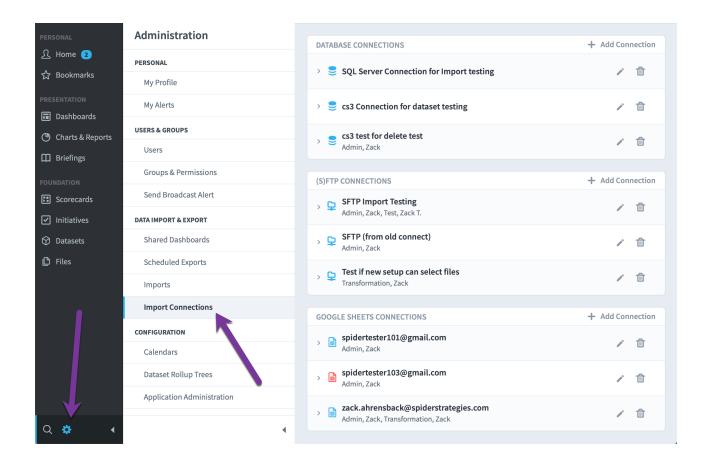
FILTER Dale Peterson Include Results From Group Memberships		•	< C	lear
KPI VALUES Image: Holiday party demo Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale	✓ Expand	+ 1 0	New In	nport T
Inventory Montgomery, Janet, O'Reilly, Scott, Peterson, Dale	 Expand 	0	6	ŧ
Weekly stats update Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale, Sampson, Brandon	✓ Expand	0	6	1

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			- (A)	Clear
_				cicai
Include Results From Group Memberships				
KPIVALUES			+ New Ir	npor
Holiday party demo Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale	1	^ Collapse	0 0	٦
DATA SOURCE INFO TRANSFORMATIONS MAPPING: 2 advanced.xlsx 2 2 23 RESULTS 2 2 Details	S 🖋 IMPORT SCHEDUI Not Scheduled		19 4:06 PM	
Inventory Montgomery, Janet, O'Reilly, Scott, Peterson, Dale		✓ Expand	0 0	đ
Neekly stats update				

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.

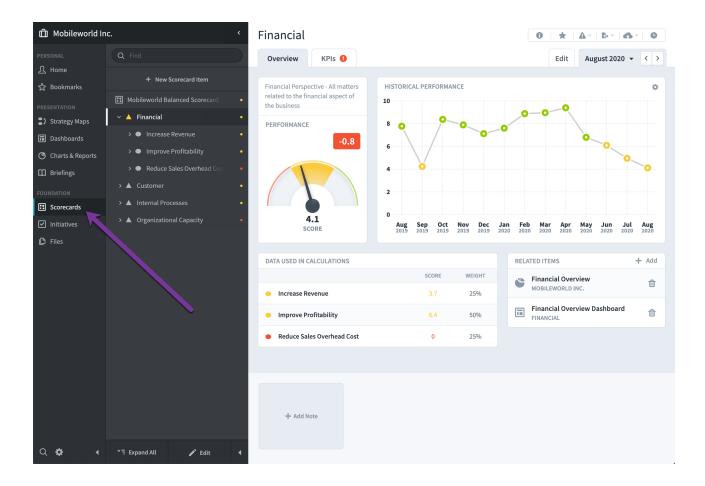


Scorecards

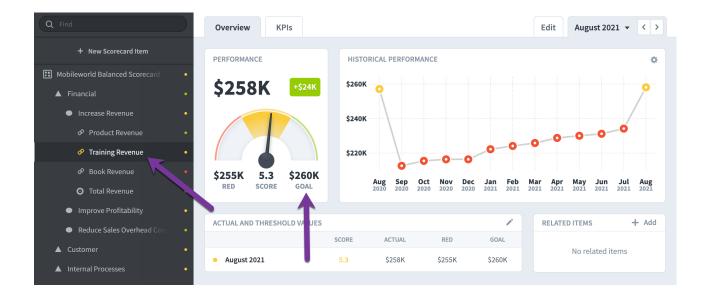
Overview of Scorecards

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

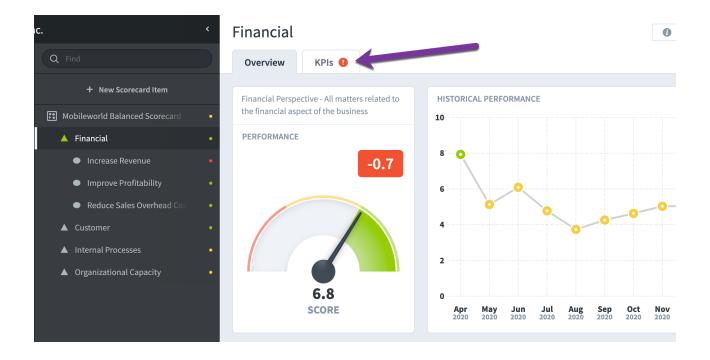
The Scorecards overview tab shows all of the information about a scorecard item and how it's performing. As you click around the scorecard tree on the left, the information for the selected item is shown on the right.

<	Book Revenue						- B- 6 -	C
Q Find	Overview KPIs					Edit Qu	arter 3, 2020 👻	< >
+ New Scorecard Item	PERFORMANCE	HISTORICAL	PERFORMANCE 2				1	٠
Financial Profit and Loss								
Revenue	\$111K +\$8,500	\$180K - <mark>0</mark>	/\					
 Product Revenue 		\$160K						
 Training Revenue 			$\langle \rangle / \rangle \langle \rangle$			<u> </u>		
 Book Revenue 		\$140K			/	0		
Cost of Sale •		\$120K			•			
 Gross Profit 						0		
 Operating Expenses 	\$105K 4.7 \$120K RED SCORE GOAL	\$100K	04 01 0	2 02 0	04 01	03 03 04	01 02	03
 Net Operating Profit 	RED SCORE GOAL	Q3 2017	Q4 Q1 Q 2017 2018 201	2 Q3 Q 18 2018 20	Q4 Q1 018 2019	Q2 Q3 Q4 2019 2019 2019	Q1 Q2 2020 2020	Q3 2020
	ACTUAL AND THRESHOLD VALUES 3					RELATED ITEMS	4 1	- Add
		SCORE	ACTUAL	RED	GOAL	Develop a MOBILEWO	web marke	Û
	• July 2020	7.3	\$41K	\$35K	\$40K			
	• August 2020	4	\$36K	\$35K	\$40K			
	September 2020	2.7	\$34K	\$35K	\$40K			
		-						
*ন Expand All 🖍 Edit ◀	+ Add Note Add Note A FEW SECOND	ward. Let's ative in place						

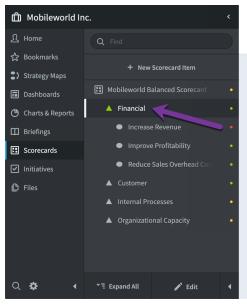
- The speedometer shows the performance for the current calendar period (purple arrow). In this example we're looking at a KPI and we can see its actual value, goal, and how much it has changed since the previous period.
- The historical performance chart shows how this KPI has changed over time.
 You 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		6- 0
Overview KPIs •					Edit	April 2021	• < >
KPIS						‡ Disp	lay 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, Ir	nc. <	Financial	
	Q Find	Overview KPIs	Edit August 2020 🗸 < >
요 Home ☆ Bookmarks	+ New Scorecard Item		x you want to edit many at once, use the <u>suport Writer</u> to filter for items
PRESENTATION	Corporate Scorecard	anything, including item names, aggregation type, or owners and	nows all scorecard items in this organization, where you can change updaters.
Strategy Maps	▲ Financial •		
Dashboards	7	Name	Туре
🕒 Charts & Reports		Financial	Key Performance Area
Briefings		Description	Weight
FOUNDATION	•	This is our Financial Perspective	100%
E Scorecards			
Initiatives			Advanced Options
🖒 Files			
		OWNERS	
		Add Owner	
Q 🏟 📢	* ∃ Expand All ✓ Done ◀	[→ Move ☐ 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 Proformance 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 Op	tions
	owings		
	Add Owner		
* ∃ 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).

nc. ·	Create Key Performance Area	₽ ∨ 6 ∨
Q Find	Overview KPIs	Edit August 2020 👻 < >
+ New Scorecard Item	Name	Туре
Corporate Scorecard •	Customer	Key Performance Area
▲ Financial •	Description	
Customer	Type your description here	Advanced Options
	OWNERS	
	Add Owner	
° র Expand All ✔ Done	()	Cancel

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 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.

IC.	 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		Advanced Options
🔗 Product Revenue		Advanced Options
🔗 Training Revenue		
🤣 Book Revenue	OWNERS	
Total Revenue	Start Typing	
Improve Profitability	Sam Smith	⊡
Reduce Sales Overhead Cost	Scott O'Reilly	
▲ Customer	Scott o Reiny	
▲ Internal Processes		Notify Users/Groups of Assignment/Unassignment
ेन्ह Expand All 🖌 🖌 Done	 G→ Move G→ Copy The 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				
ည် Home 1	Welcome	● 5 KPIs ● 1 KP	ا ا	4 KPIs	
☆ Bookmarks	Alerts 1				
	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
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
		O 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	This is where you edit and create scorecard items	one at a time. If you want to edit many at once, use the Report
Financial Profit and Loss •		s Edit button. For example, <u>this report</u> shows all scorecard items in , including item names, aggregation type, or owners and updaters.
✓ ■ Revenue •		
Product Revenue	Name	Туре
 Training Revenue 	Training Revenue	О КРІ
 Book Revenue 		
> 🖸 Cost of Sale 🔹 🔹	Description	Weight
> 🖸 Gross Profit 🔹 🔹	Type your description here	33.3%
 Operating Expenses 		Advanced Options
> 💿 Net Operating Profit 🛛 🔹 🛛		
	KPI DETAILS	
	Scoring Type Calendar	Data Type
	Goal/Red Flag	y 👻 🕄 Currency 👻
	Aggregation Type	Precision 5 Currency 6
	+ Sum - Default	▼ Default ▼

- 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	days	•

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
	 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.

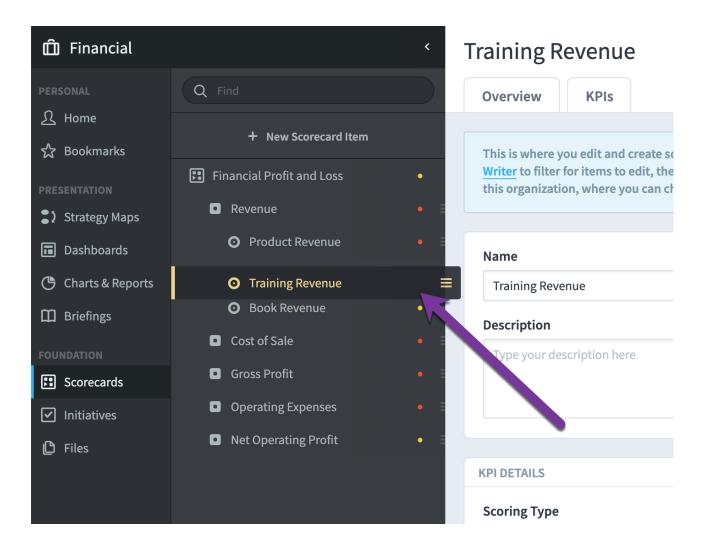
KPI Updaters

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	
ম	Q Find	Overview KPIs	Edit February 2020 👻 < >
रू •	+ New Scorecard Item	This is where you edit and create scorecard items one at a time. If you want to edi	
•	 Financial Profit and Loss Revenue 	for items to edit, then click the Mass Edit button. For example, <u>this report</u> shows a you can change anything, including item names, aggregation type, or owners and	
m	 Cost of Sale O Product Costs 	Name Type	
	Training Venue Costs	Total Costs O KPI Description Weight	
۵	Book Production Costs Total Costs	25%	
	 Gross Profit 		Advanced Options
	Operating Expenses		
୍ ପ	Net Operating Profit	KPI DETAILS	
₩	* 〒 Expand All ✔ Done	다 Move 디 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	
읅 3 Color	Manual	- 🗹 Manual	
🚓 4 Color Blue			
🖍 4 Color Orange	39,584	\$ 38,750	
4 Color Scored Middle			
🙈 2 Color Stabilize			

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

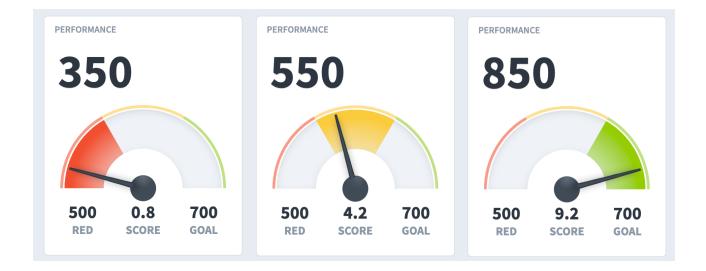
In this example our KPI will turn red if the value us lower than 255,000 and green if it's higher than 260,000. When higher values are worse, the *Goal* threshold is going to have a lower number than the *Red Flag* threshold.

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:

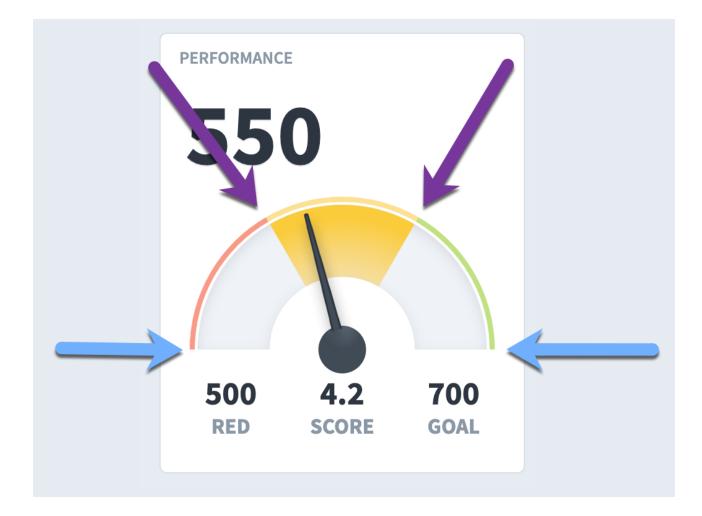
(goal - red flag) + goal.

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	Cal	endar		Is Yes Good?	
🐥 Yes/No 🦰	- M	onthly	•	மீ Yes	-
Aggregation Type				1	
% Percentage Yes	•				
ERIES				•	
Actual Value					
🖸 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 🗸	35,000 \$ 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	ד d Yes	•
Data Type	Aggregation Type	Decimal Precision	
% Percentage	→ Average		-
ERIES	Goal		
ERIES Actual Value		•	

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

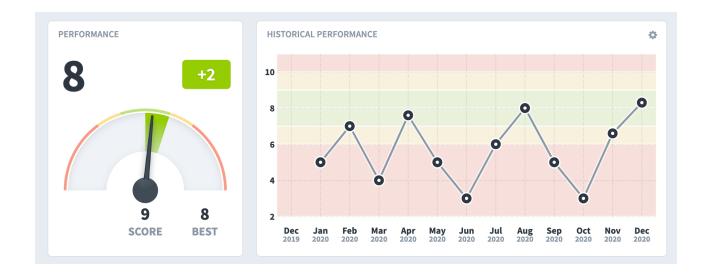


Stabilize Scoring

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	T Manual	T Manual	
	3	6	
Low Target	Best	High Target	
	- Manual	- 🗹 Manual	
Manual			
	8	9	
7		9	
🗹 Manual	8	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.

Scoring Type	Calendar		Data Type	
🖍 4 Color Orange	▼ Monthly	•	Currency	
Aggregation Type	Decimal Precision		Currency	
+ Sum	- Default	-	Default	,
	Worst		Red Flag	
	Worst T Manual	•	Red Flag	
Actual Value		•		
Actual Value [^ Manual	▼ Manual		🗹 Manual	
ERIES Actual Value [] Manual Warning [] Manual	 ▼ Manual 450,000 		Manual 465,000	

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. For a comprehensive list of all equation syntax and functions, see the <u>Equations</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		
PERSONAL 요 Home	Q Find	Overview KPIs		Edit August 2020 👻 < >
☆ Bookmarks		Name	Туре	
PRESENTATION	Financial Profit and Loss	Total Revenue	O KPI	•
Strategy Maps	✓ ■ Revenue •	Description		
Dashboards	 Product Revenue 	Type your description here	A	dvanced Options
🕒 Charts & Reports	 Training Revenue 			
🛱 Briefings	Book Revenue			
FOUNDATION	O Total Revenue			
Scorecards	> 🖸 Cost of Sale 🔹 🔹	KPI DETAILS		
Initiatives	> 🖸 Gross Profit 🔹 🔹	Scoring Type C	alendar	Data Type
🕒 Files	> Operating Expenses	🖍 Goal/Red Flag 👻	Monthly -	Currency -
	> Net Operating Profit	Manual Aggregation Type C	alculated 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	Calendar	Data	а Туре	
Goal/Red Flag	▼ Monthly	-	Currency	
Manual Aggregation Type	Calculated Aggregation Type	Deci	mal Precision	
+ Sum 3		▼ De	fault	
Currency				
Default	•			
SERIES				
	Red Flag	Goa	1	
Actual Value	Red Flag	Goa		
SERIES Actual Value	▼ 🗹 Manual	• 0	l Manual	
Actual Value	▼ 🗹 Manual	• 0		

- 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.
- 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	Gross Profit		Scoring Type		Calendar	Data Typ	e
	Set Equa	tion					ency
	Actual Value	e Equation				allowed input: +-*/()	recision
	туре	quation here					
	Туре КРІ 🔻	KPI Select a KPI 🧪	Series	Period Current 👻	Add 2		
	Cancel					Done	aal
			Any missing val	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		Gross Profit		Scoring Type		Calendar	Data Typ	e
		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.

(1673) Product Revenue	
Q Find	Q Find
 Marketing Customer Support 	• This KPI Financial Profit and Loss
Sales	Revenue Product Revenue
OperationsInformation Technology	 Training Revenue
Human ResourcesCommercial	 Book Revenue Cost of Sale
Financial	> Gross Profit
~∃ Expand All	Ϋ́Ξ Expand All
Cancel	Done

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

initiatives		Scoring Type	Calendar	Data Type
Files	Set Equation			
	-			ion
	Actual Value Equation		allo	wed input: + - */()
	Type your equation here			
	Туре КРІ 2	Series 3 Period	4	
	KPI - (1673) Product Revenue	Actual Value 👻 Current		
	Cancel			Done
		- canculated		

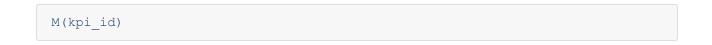
1. The item type is KPI. We'll explain below how to reference other things like Initiatives and Scores.

- 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	٥	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	
			Calculation of the second			

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: + - */()
	M(1673) +			
	Туре КРІ	Series Period	I	
	KPI 🔻 (1674) Training Reve	nue 🧪 🛛 Actual Value 👻 Curre	ent 👻 Add	
	Cancel			Done
		Catcolated	C Manuar	L 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)							
	Туре	KPI	Serie	s	Period				
	KPI 🔻	(1674) Training Revenue		ual Value 🔻	Current -	Add			
	Cancel						Done		
				- carconarce		manuar	- Manuar		

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

itiatives	Gross Profit	Scoring T	уре	Calendar	Data Type		
	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	\$
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.

<	Total Revenue		
Q Find	Overview KPIs		Edit August 2020 👻 < >
+ New Scorecard Item	PERFORMANCE	HISTORICAL PERFORMANCE	\$
Financial Profit and Loss Revenue Product Revenue	\$593K -\$2.45M	\$5M	
Froduct Revenue Training Revenue Book Revenue		\$3M	•
Total Revenue Cost of Sale		\$2M \$1M	
Gross Profit •	\$500K 6.4 \$600K RED SCORE GOAL	50 Aur Con Oct Nov Dec Jan Feb ACTUAL VALUE: AUGUST 2020 2019 2019 2020 2020	Mar Apr May Jun Jul Aug 2020 2020 2020 2020 2020 2020
Operating Expenses Net Operating Profit		\$593,000	
	ACTUAL AND THRESHOLD VALUES	Equation	RELATED ITEMS + Add
	August 2020 6		No related items
ॅन् Expand All 🧪 Edit 📢		Show Notes (0)	

Common Equation Syntax

The <u>Equations</u> article has 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 ▼ cot		allowed input: + - */()
	M(935) + M(936) + M(937)	exp		
•		floor		ced
	Type KPI F	if	Period	_
	KPI 🔻 (937) Book Revenue 🧪	im	Current - Add	
•		lg		yp
	Cancel	ln 🗸		Done
Cu	Aggrega	log	Decimal Precision	Currency
	Improve Customer Satisfact • • • • • • • • • • • • • • • • • • •	mod	* Default	- Default
	Customer Satisfaction S	polar		
	Improve Customer Retention	pow		
	Customer Churn Actual V Improve Market Awareness	rand	Red Flag	Goal
_	Improve Market Awareness	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 🔹 🔹 👘 👘		
Strates	Select a KPI		
🙃 Dashb			
🕑 Charts	Q Find	Q Find	
🖽 Briefin	Mobileworld Inc.	O This KPI	
OUNDATIO	Key Performance Indicators	Financial Profit and Loss	
🟗 Scorec	Financial	Revenue	
🗹 Initiati	Marketing	O Product Revenue	
🗘 Datase	Customer Support	O Training Revenue	
🗘 Files	Sales	O Book Revenue	
	Operations	Cost of Sale	
	Information Technology	Product Costs	
	Human Resources		*
	* ₩ Expand All	>∃ Collapse All	5
	Cancel	D	Done
	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 Equati	on		Тур)e
Actual Value E	quation		allowed input: +- */()	rrency
M(1673) +	• M(1674) + M(1675) + I(TB,8017) +	S(921)	mal	Precision
			fault	t
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 Equatio	n		
Actual Value Eq		allo	wed input: + - */()
M(1673) +	M(1674) + M(1675) + I(TB,8017) Initiative	Calculation	
Initiative -	(8017) Migrate Servers to Cloud 🧪	Total Budget Add % Complete	
Cancel		Projected Schedule Variance Total Budget	Done
	Calculated	Money Spent to Date Budget Remaining	Go ~ (
	Any missing value makes entire equ		5
	M(1673) + M(1674) + M(1675)	Designated Budget Verience	

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.

Set Equation Actual Value Equation			allowe	d input: + - */
M(1673) + M(1674) + M(1675) + I(TB,80	D17) + TD(Quarterl	y,1466,Actual Value,		
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 KPI Values

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 building an equation for a number KPI, and we're using the value from a Yes/No KPI in that equation. "If the value for KPI #123 is yes, return 5. Else return 20"

if(M(123), 5, 20)

It goes the other way too. In this example, we're building an equation for a Yes/No KPI, and we're using the value from a number KPI in that 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 in a Yes/No KPI's equation.

Because Yes/No KPI values are treated as 1 and 0, you can even use them in functions just like any other KPI value. In this example we're building an equation for a calculated Yes/No KPI. This equation looks at three other Yes/No KPIs. If most of them are yes, it returns yes. If most are no, it returns no.

```
if(avg(M(123), M(456), M(789)) > 0.5, true, false)
```

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	ACT	RED	GOAL	
October 2020	\bigcirc	\$	35,000	\$ 40,00	0 \$
November 2020	\bigcirc	39,650 \$	35,000	\$ 40,00	0 \$
December 2020	2	N/A	35,000	\$ 40,00	0 \$

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

```
if(isblank(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, blank, 20)

Returning a N/A value would look like this:

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

Full equation syntax

For a comprehensive list of all equation syntax and functions, see the <u>Equations</u> article.

Exploring How a KPI is Calculated

Introduction

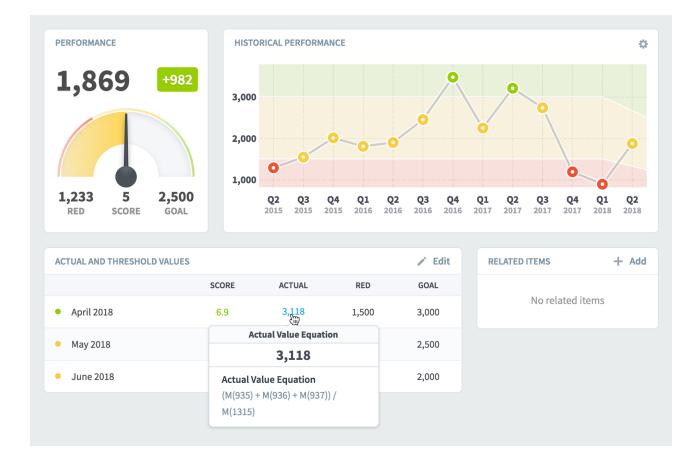
Spider Impact is great at calculating KPI values and aggregating them over time and across organizations. It's important for everyone in your organization to have complete faith in how a number was calculated, however, and Spider Impact shows its work.

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.

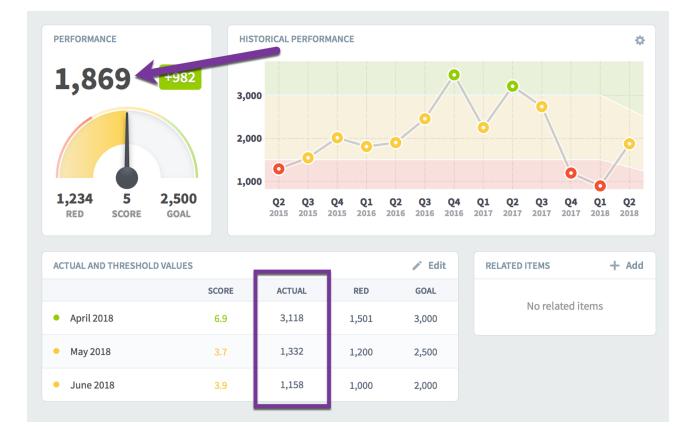
Exploring KPI Calculations

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.

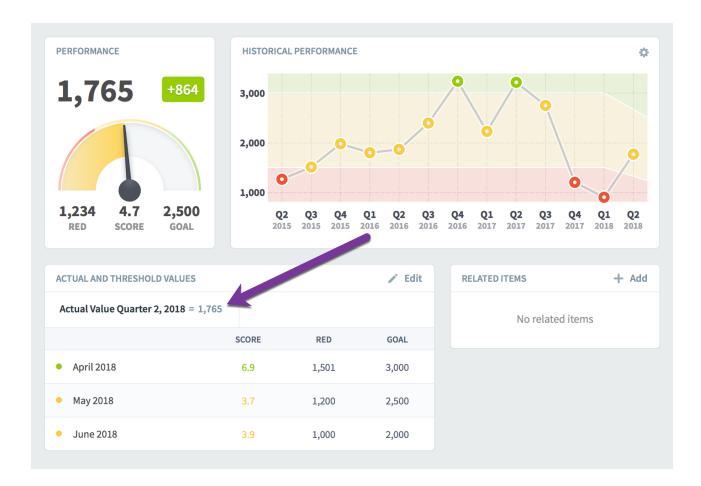
ata Used in Calculations	
ACTUAL VALUE EQUATION	
Any missing valu Number of Customers plank	
(M(935) + M(936) + M(937)) / M(1315)	
APRIL 2018 ACTUAL VALUES	
(908K + 900K + 44K) / 594 = 3,118	
Close	

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	
⊐ 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.

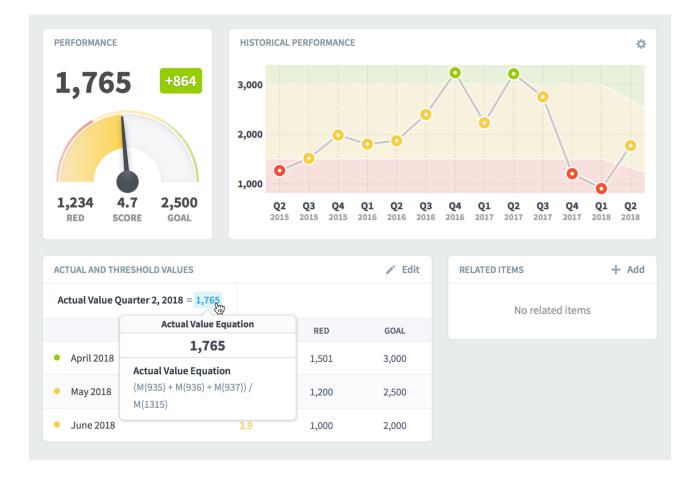


That's because when we changed the calculated aggregation type, the software calculates the KPI's quarterly value differently.

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		203
enue	ACTUAL VALUE EQUATION: AVERAGE REVENUE PER CUSTOMER	_
of Custe Revenue	Any missing valu Number of Customers blank	
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		
Capacit	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 F	Revenue		0 <u>A</u> + <u>B</u> + <u>A</u> + <u>O</u>
PERSONAL	Q Find	Overview	KPIs ()		Edit August 2020 👻 < >
요 Home ☆ Bookmarks	+ New Scorecard Item	This is where	you edit and create scorecard items one at a time. If you	ı want to edit many at once, use	the <u>Report Writer</u> to filter for items
	Mobileworld Balanced Scorecard		click the Mass Edit button. For example, <u>this report</u> show luding item names, aggregation, we, or owners and upo		nization, where you can change
Strategy Maps	▲ Financial •				
Dashboards	 Increase Revenue 	Name		Туре	
🕒 Charts & Reports	 Product Revenue 	Product Rev	venue		-
Briefings	Training Revenue Book Revenue	Description		Weight	
FOUNDATION		Type your d	lescription here	25%	
E Scorecards	 Total Revenue 			A duran	
Initiatives	 Improve Profitability 	=		Advan	ced Options
🕒 Files	Reduce Sales Overhead Cos				
	▲ Customer •	CHOOSE SOU	RCE ITEM		
	Internal Processes	Q Find		Q Find	
	 Organizational Capacity 	Key M	leasures	Financial Profit and Loss	
		Finan	cial	Revenue	
		Market	eting	 Product Revenue 	0
		Custo	mer Support	 Training Revenue 	-
		Sales		O Book Revenue	
		• Us	5	Cost of Sale	
		•	East Coast	> Gross Profit	
			Northeast	 Operating Expenses 	
			Southeast	Operating Expenses	
			>∃ Collapse All	*5	Expand All
		USE FROM SO			
		Name and	Description 🗸 Tags		
		✓ Notes	Related Items		
		Owners			
Q 🌣 📢	* 🗄 Expand All 🖌 🖌 Done	G→ Move (ට Copy 🛍 Delete		Cancel Save

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

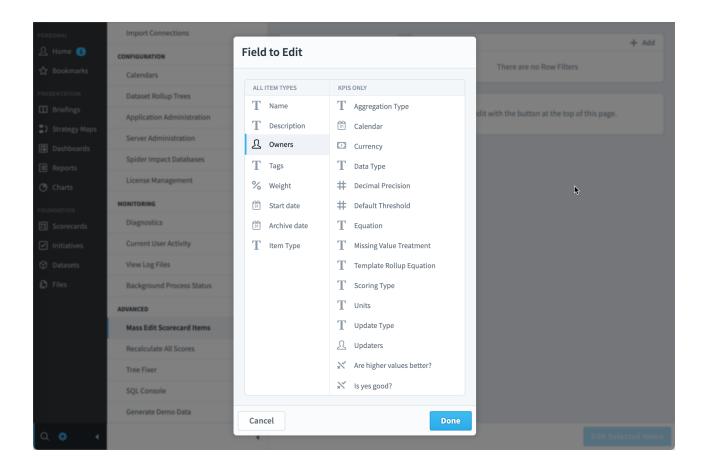
- 1. You need to choose where the source item is. In this example we're choosing the "Product Revenue" KPI from the "Financial" organization.
- 2. You need to choose what to pull from the source item. It's always going to reuse things like scores, actual values, and thresholds because that's the point 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 allows you to edit multiple scorecards at once, and it can save you a lot of time. To start, go to the Administration section, choose "Mass Edit Scorecard Items", and then click the "Choose a Field to Edit" button.

	· · · · · · · · · · · · · · · · · · ·			
PERSONAL	Application Administration	FIELD	ROW FILTERS	+ Add
允 Home 1 ☆ Bookmarks	Server Administration	Choose a Field to Edit 🧪	There are no Row Fil	ters
	Spider Impact Databases			
PRESENTATION	License Management	There are no fields to edit	. Choose a field to edit with the button at the	e ton of this nage
Strategy Maps	MONITORING	There are no needs to cont.	choose a neid to care with the batton at the	, top of this page.
Dashboards	Diagnostics			
E Reports	Current User Activity			
🕒 Charts	View Log Files			
FOUNDATION	Background Process Status			
Scorecards	ADVANCED			
✓ Initiatives	Mass Edit Scorecard Items	•		
 Datasets 	Recalculate All Scores			
🕒 Files	Tree Fixer			
	SQL Console			
	Generate Demo Data			
۹ 🔹 🔹	4			Edit Selected Items

In this example we'll choose Owners.



Next, we'll add a filter to choose which scorecard items show up to edit.

FIELD	ROW FILTERS	+ Add
Owners 🌶	There are no Row Filters	7
There are no scorecard items	to edit. Choose the items you want to work with by add	ling filters above.

The default filter is "Specific Scorecard Items," and we'll use that here.

ct Databa	Mass Edit S	corecard Items: Add Row Filter	
		ething that you want to filter on. This will limit your report to only s for scorecard items that match your filter.	/
Activity	Filter On		
Process :	Specific Score	card Items	
orecard I	Cancel	1 2	Next

We'll add the entire "Mobileworld Balanced Scorecard" and click Done.

	Import Connections		
<u>ع</u> ۲	Filter: Specific Scorecard Items		
t≩ E	·		_
PRESE	ID NAME	ORGANIZATION	=
ED E	915 Mobileworld Balanced Scorecard	Mobileworld Inc. Example	⊕ ✓
\$) s ⊞ c	Show descendants of linked items		
III F	SCORECARD ITEM		
(Q Find	Q Find	
FOUN	O SPIDER IMPACT	E Mobileworld Balanced Scorecard	- Am
:: S	O YOUR TRIAL ENVIRONMENT	> 🔺 Financial	G
	Mobileworld Inc. Example	> 🛦 Customer	
φc	Key Measures	> 🔺 Internal Processes	
D F	Financial	> 🔺 Organizational Capacity	
	Marketing	Test KPI	
	Customer Support		
	Sales		
	Ϋ́∓ Expand All	र्≒ Expand All	
	Cancel Back	0-0	Done
Q 🔅	•		Edit Selected Items

Now we can see all of the scorecard items for the Mobileworld Balanced Scorecard. You can edit a few at a time, but we're going to select all and click "Edit Selected Items".

Import Connections	FIELD		ROW FILTERS	Showing 37 of 440 Scorecard Items	+ Add
CONFIGURATION				-	•
Calendars	Owne	rs 🌶	Specific Scorec Scorecard and	ard Items: is any of the following: Mobilewon descendants	rld Balanced
Dataset Rollup Trees					
Application Administration		NAME		ORGANIZATION	OWNERS
Server Administration	\checkmark	Mobileworld Balanced Scored	card	Mobileworld Inc. Example	
Spider Impact Databases		Financial		Mobileworld Inc. Example	
License Management		Increase Revenue		Mobileworld Inc. Example	
MONITORING					
Diagnostics		Product Revenue		Mobileworld Inc. Example	Full User
Current User Activity		Training Revenue		Mobileworld Inc. Example	🔍 Full User
View Log Files		Book Revenue		Mobileworld Inc. Example	🔲 Full User
Background Process Status		Total Revenue		Mobileworld Inc. Example	
ADVANCED		Improve Profitability		Mobileworld Inc. Example	
Mass Edit Scorecard Items					
Recalculate All Scores		Net Operating Profit (before t	tax)	Mobileworld Inc. Example	
Tree Fixer		% Net Operating Profit		Mobileworld Inc. Example	
SQL Console		Reduce Sales Overhead Cost		Mobileworld Inc. Example	
Generate Demo Data		Sales & General Admin		Mobileworld Inc. Example	
•	t			Ed	lit Selected Item

We'll add the Human Resources group as owners.

istration		Mobileworld Balanced Scorecard	Mobileworld Inc. I
t Databases	Edit Select	ed Items: Owners	world Inc. 1
gement			
	ACTION	Add the following owners	world Inc. 1
	OWNERS		world Inc. I
Activity	Start Typing		world Inc. I
Process Status	💽 Human	Resources (Update Users)	world Inc. I world Inc. I
orecard Items	Cancel		Save world Inc. I

After clicking Save, we see a message summarizing all of the changes that were made. If some of the changes didn't work, it explains why as well.

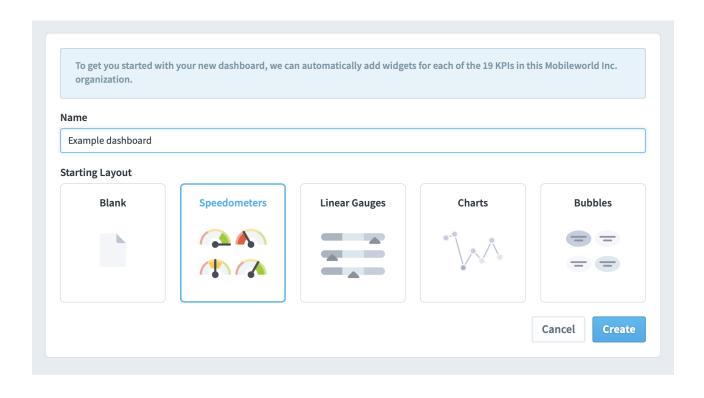
FIELD		ROW FILTERS	Showing 37 of 440 Scorecard Items	+ Add
Owners ,	<i>i</i>	Specific Scorecard Scorecard and de	d Items: is any of the following: Mobileworld scendants	Balanced
These itemProductSales &	General Admin er Churn			
• 14 more				
These itemOrganizImprove	ns were not updated becaus ational Capacity e Knowledge and Skills e Contract Management	se the assignees do not h	ave permission to the item:	

Dashboards

Building Dashboards

Creating a Dashboard

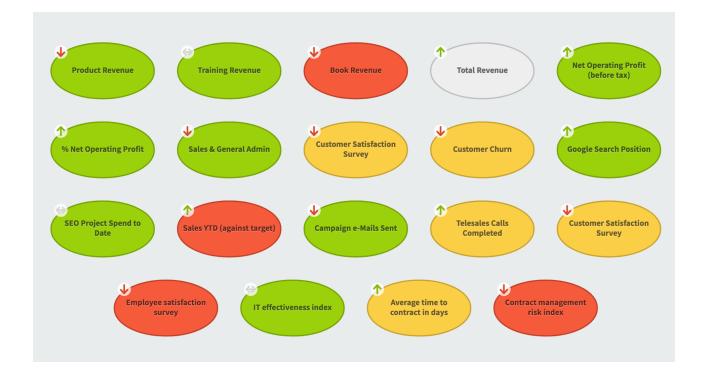
New dashboards default to Blank, but you also have the option to automatically add widgets for each KPI in the organization. This can be a great starting point for building KPI dashboards.



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

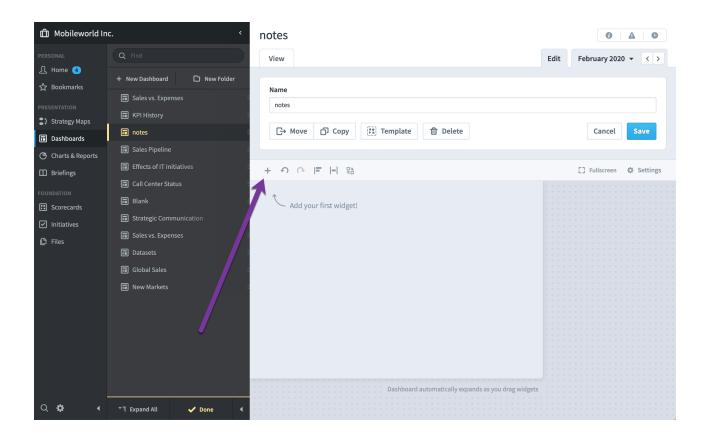


This is what the dashboard would have looked like if we had chosen bubbles.

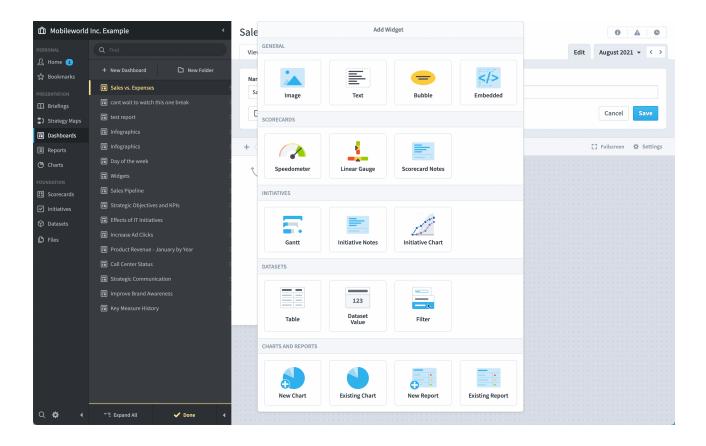


Adding Widgets

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



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

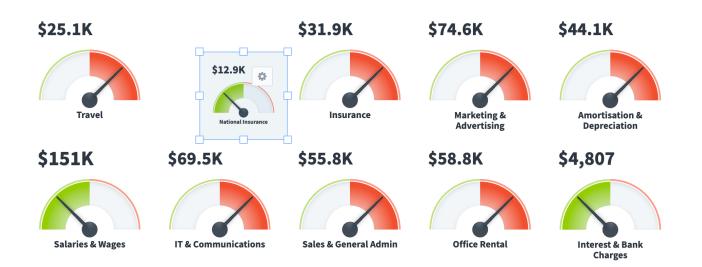


Each type of widget has unique configuration options, many of which are discussed in separate articles.

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

Arranging Widgets

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

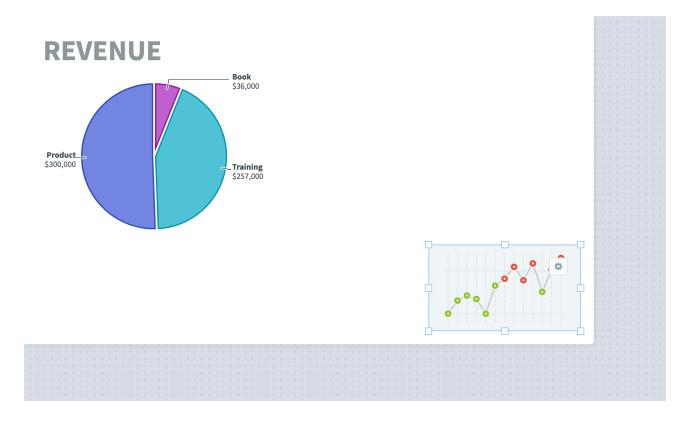


Automatically Resizing Canvas

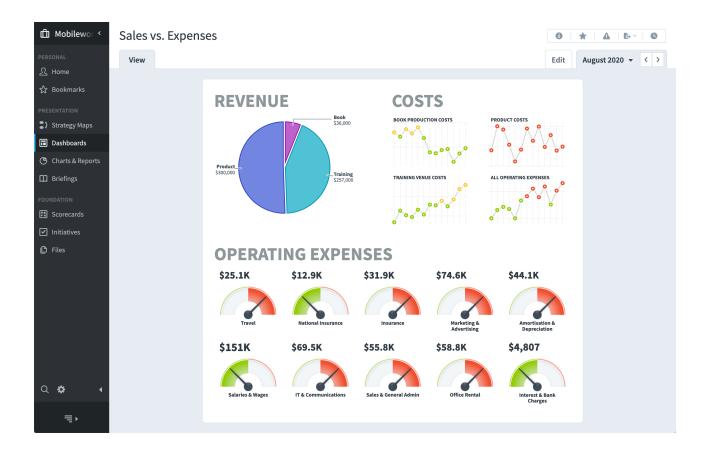
Your dashboard canvas will automatically expand as wide as you want it to be. For example, we can start dragging this chart here:



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.

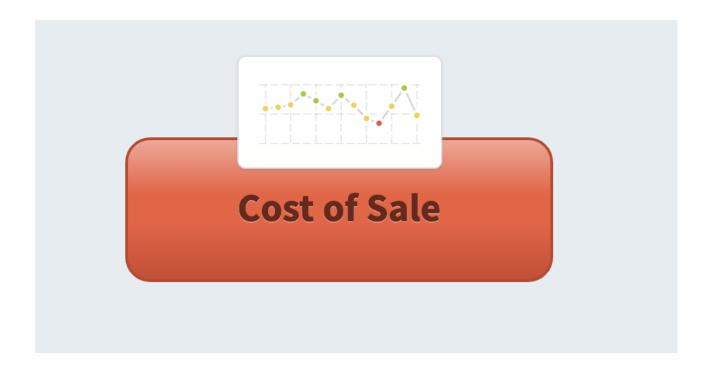


Automatic Ordering

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.

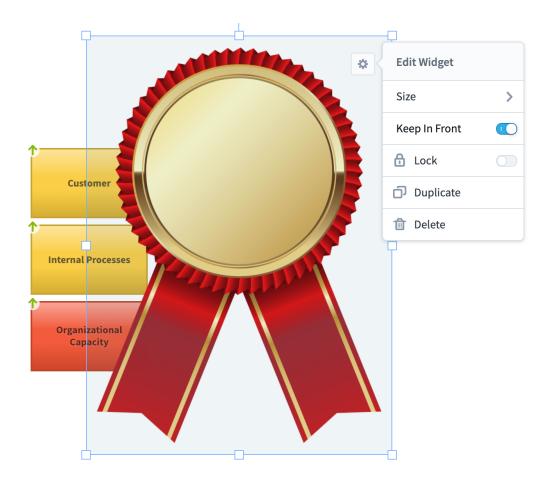


Keeping smaller widgets on top of larger widgets works great the vast majority of the time. If you're doing very complex layouts, however, there are times when you want to force a widget to the top.

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.



Rotating Widgets

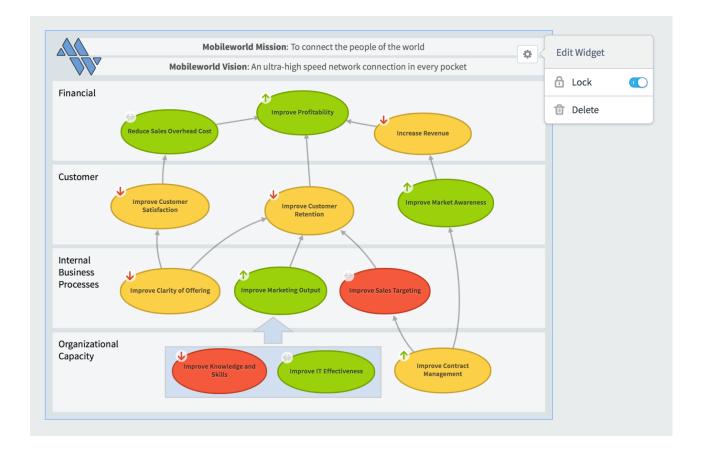
<u>Text</u> and <u>Image</u> widgets can be rotated using their rotation handles.



Locking Widgets

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

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



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

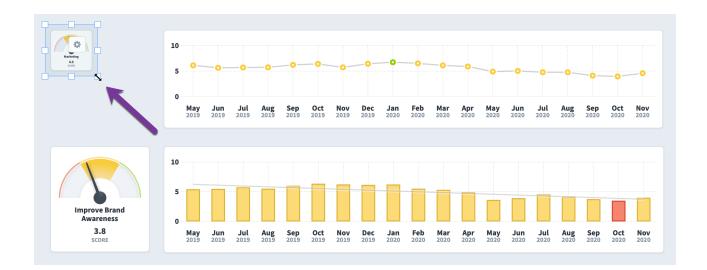
Widget Spacing, Alignment, and Sizing

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.

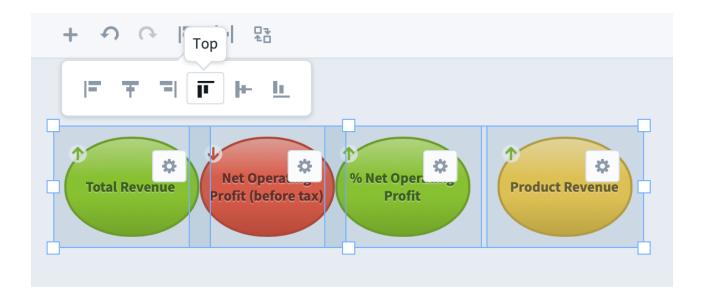


Align

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.

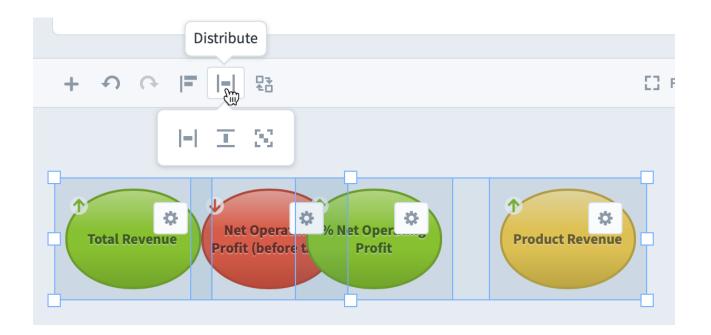


When we click the align top button, it moves all of the selected widgets to the highest point of all four widgets.

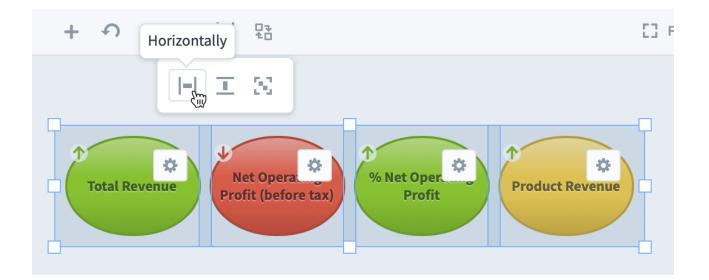


Distribute

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.

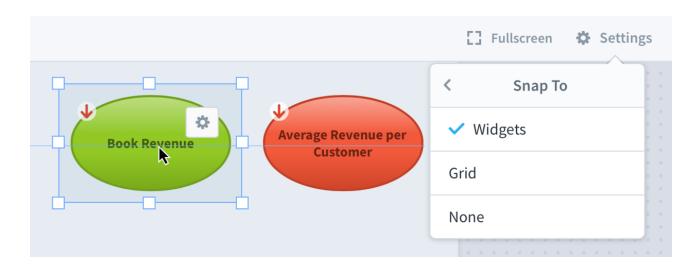


After clicking the button, the widgets are now evenly spaced.

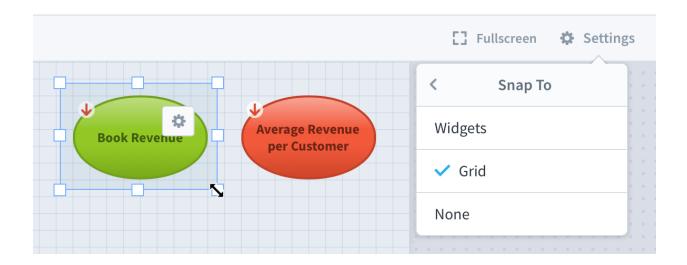


Alignment Snapping Options

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.



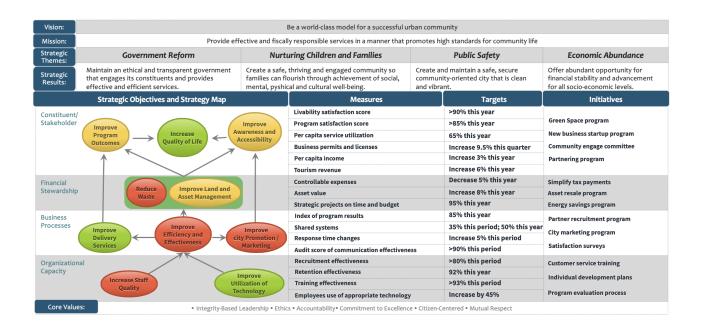
Finally, you can choose Snap-to None, which disables snapping all together. This is useful when fine-tuning layouts or when there are widgets that are irregularly placed.

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

Dashboard and Strategy Map Backgrounds

Overview

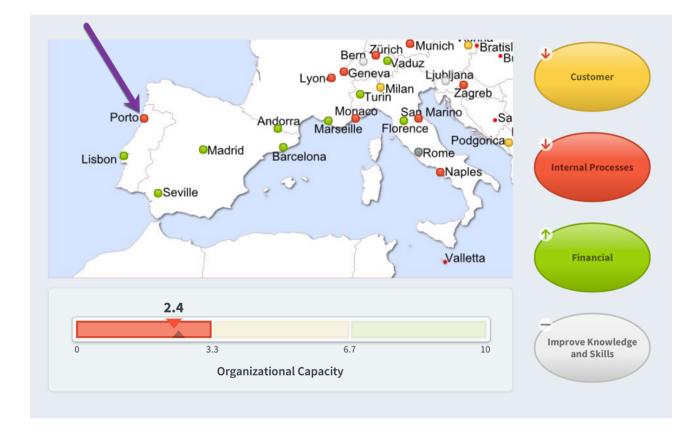
Dashboards and strategy maps look even better when you use image widgets creatively. For example, you can create a precise layout that looks exactly like the presentations your leadership team is is used to seeing. This is just a screenshot of a PowerPoint slide with dashboard widgets on top.



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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	ß	BALANCED SCORECARD INSTITUTE	Strategic I	Planning and Mai	nagement Systen	n Example
	Vision:			Be a world-class model for a successful t	urban community	
	Mission:		Provide effective and fi	cally responsible services in a manner that	promotes high standards for community life	
	Strategic Themes:	Government Reform	n N	rturing Children and Families	Public Safety	Economic Abundance
H.	Strategic Results:	Maintain an ethical and transparen that engages its constituents and p effective and efficient services.	provides families ca	ife, thriving and engaged community so n flourish through achievement of social, shical 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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	Stakeholder		Improve	Program satisfaction score	•>85% this year	Green Space program
		Improve Program Ouality of	e Awareness	Per capita service utilization	 65% this year 	New business startup program
7		Outcomes Quality of	Life and Accessibility	Business permits and licenses	• ↑9.5% each quarter	Community engage committee
*				Per capita income	• 13% this year	 Partnering program
				Tourism revenue	 ↑6% this year 	
-	Financial			Controllable expenses	• ↓ 5% this year	 Simplify tax payments
	Stewardship	Reduce Waste	Improve Land and Asset	Asset value	 ↑8% this year 	Asset resale program
			Management	 Strategic projects on time and budget 	• 95% this year	 Energy savings program
9 88 5	Business	1		 Index of program results 	 85% this year 	
_	Processes	Improve Improv	ve Improve city	Shared systems	 35% this period; 50% this year 	 Partner recruitment program
The state and the second		Delivery 🖌 Efficiency	and Promotion/	Response time changes	 ↑5% this period 	City marketing program Satisfaction surveys
B B M C		Services Effective	ness Marketing	Audit score of communication effective	eness •>90% this period	- Saustacuon surveys
	Organizatio	nal		Recruitment effectiveness	 > 80% this period 	
The state of the same grow	Capacity		Improve	Retention effectiveness	• 92% this year	Customer service training
		Increase Staff Quality	Improve Utilization of	Training effectiveness	 >93% this period 	Individual development plans Program evaluation process
		Quanty	Technology	Employees use of appropriate technology	ogy • 145%	* Program evaluation process
	Core Valu	es:	Integrity-Based Leadership • I	thics • Accountability• Commitment to Excellen	ce • Citizen-Centered • Mutual Respect	8
-0.0 M						©1997-2020 Balanced Scorecard Institute.

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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141	Mission:		Provid	e effective and f	iscally responsible services in a manner that	promotes high standards for community lif	fe	🔺 🖉
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	Stakeholder			Improve	Program satisfaction score	• >85% this year	Green Space program	
100		Improve Program Outcomes	Quality of Life	Awareness and	Per capita service utilization	* 65% this year	New business startup program	
		Outcomes	Quality of the	Accessibility	Business permits and licenses	• 19.5% each quarter	 Community engage committee 	
		1		´	 Per capita income 	• 🛧 3% this year	 Partnering program 	
9665-			\searrow		Tourism revenue	• ↑6% this year		
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A COLOR DOCUMENT			managemen		 Strategic projects on time and budget 	• 95% this year	 Energy savings program 	
	Business		1		 Index of program results 	 85% this year 	Partner recruitment program	
	Processes	Improve	Improve Efficiency and	Improve city	Shared systems	 35% this period; 50% this year 	City marketing program	
		Improve Delivery Services	Efficiency and Effectiveness	Improve city Promotion/ Marketing	Response time changes	 ↑5% this period 	Satisfaction surveys	
			7		 Audit score of communication effective 			
	Organization	al			 Recruitment effectiveness 	• > 80% this period	Customer service training	
	Capacity			Improve Utilization of	 Retention effectiveness 	 92% this year 	Individual development plans	
and the second se		Increase Staff Quality		Utilization of Technology	 Training effectiveness 	 >93% this period 	 Program evaluation process 	
					 Employees use of appropriate technol 	ogy *↑45%		
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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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	Strategic Results:	Maintain an ethical and transparent government that engages its constituents and provides effective and efficient services.	families can flou	riving and engaged community so rish through achievement of social, 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.	t
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S 52 12							

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.

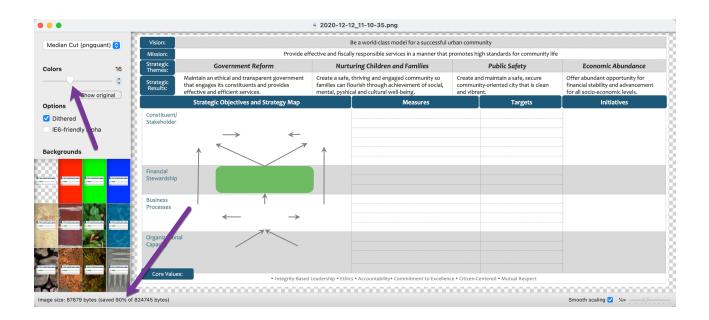
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	Mission:		Provide e	ffective and fiscal	ly responsible services in a manner that	promotes high standards for community lif	e	
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Make sure the image is large enough so that it doesn't look pixelated 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			
File		^	Size	Savings
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+ Drag and drop image files onto the area	a above		* C	Again

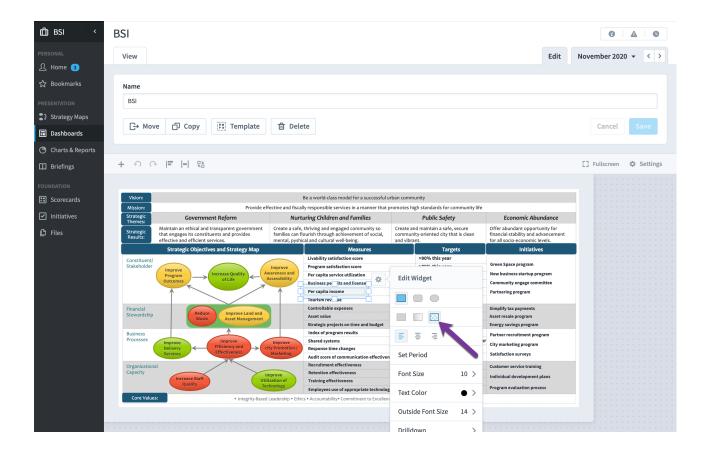
By using these two apps, we've gone from 825K to 77K. Again, there are many image compression utilities available that do this exact same thing.

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.

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	Core Values:	• Inte	egrity-Based Leadership • Etł	nics • Accountability• Commitment to Excell	ence • Citizen-Centered • Mutual Respect		
2 🌣 🔺				Dashboard automatically	expands as you drag widgets		

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.



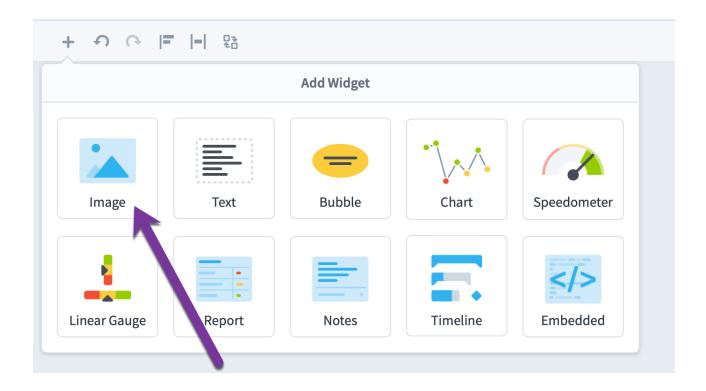
When we're done we have a fully interactive dashboard showing live data, all in a format that our organization is familiar with.

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e							
tmarks							
TION	Vision:	Be a world-class model for a successful urban community					
egy Maps	Mission:	Provide effective and fiscally responsible services in a manner that promotes high standards for community life					
	Strategic Themes:	Government Reform	Nurt	uring Children and Families		Public Safety	Economic Abundance
boards		Maintain an ethical and transparent government	Create a safe.	thriving and engaged community so	Create and	d maintain a safe, secure	Offer abundant opportunity for
ts & Reports	Strategic Results:	rategic that engages its constituents and provides		families can flourish through achievement of social, mental, pyshical and cultural well-being.		ty-oriented city that is clean ht.	financial stability and advancement for all socio-economic levels.
ings		Strategic Objectives and Strategy Map	,,,,	Measures		Targets	Initiatives
DN	Constituent/			Livability satisfaction score		>90% this year	
	Stakeholder	Improve	Accessibility	Program satisfaction score		>85% this year	Green Space program New business startup program
ecards		Program Increase Quality		Per capita service utilization		65% this year	
tives		Outcomes of Life A		Business permits and licenses	Increase 9.5% this quarter		Community engage committee Partnering program
25				Per capita income	Increase 3% this year		
				Tourism revenue		Increase 6% this year	
	Financial Stewardship	Reduce Improve Land and Asset Management		Controllable expenses		Decrease 5% this year	Simplify tax payments
				Asset value		Increase 8% this year	Asset resale program
Č (Strategic projects on time and budget		95% this year	Energy savings program
	Business Processes		Improve ity Promotion / Marketing	Index of program results		85% this year	Partner recruitment program
				Shared systems Response time changes		35% this period; 50% this year	City marketing program
						Increase 5% this period	
		Services		Audit score of communication effectivene	ess	>90% this period	Satisfaction surveys
	Organizationa			Recruitment effectiveness		>80% this period	Customer service training
	Capacity	Improve				92% this year	Individual development plans
			Ization of Training effectiveness			>93% this period	
			iniotogy	Employees use of appropriate technology	у	Increase by 45%	Program evaluation process
`	Core Values	• Integrity-Based	Leadership • Ethio	s • Accountability• Commitment to Excellenc	ce • Citizen-Cei	ntered • Mutual Respect	

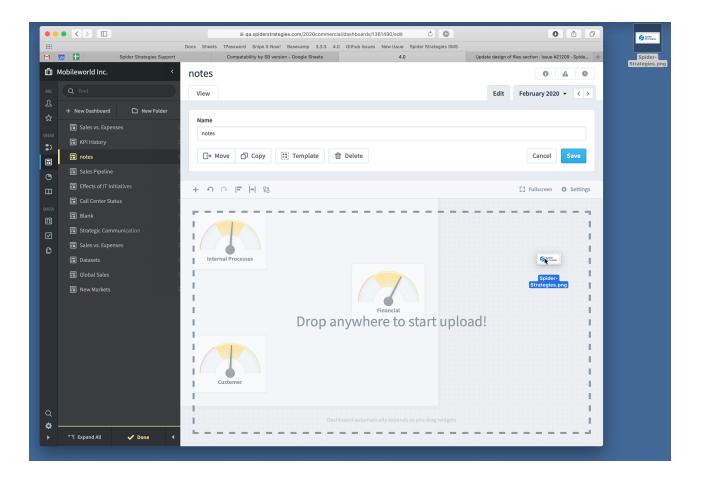
Image Widgets

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.

+ • • F H	[] Fullscreen	🗱 Settings
Upload Image Add Shared Image		

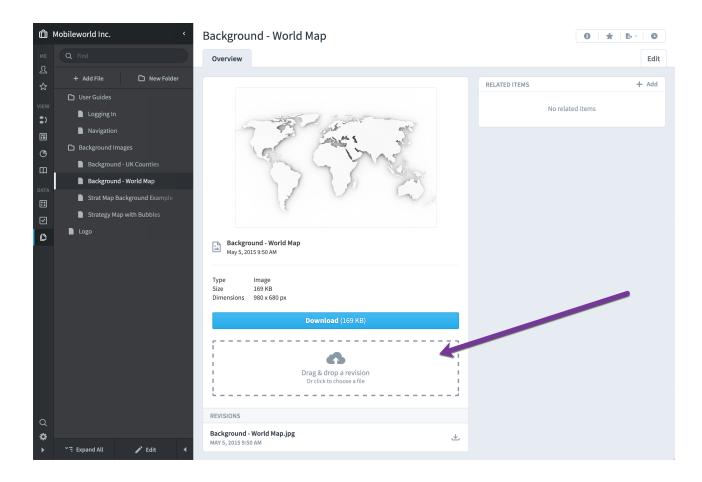
This opens a dialog where you can browse for images stored in the Files section. By default, everything is sorted by organization.

Images Stored in Files	Go to Files
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
○ Sales	Background - Faded World
O Customer Support lskajfaslkf jaslkfj aslkfj aslkfja sklfja sklfja sklfja sklfja sklfjasklfjasklfjask	980px wide, 680px tall
O Operations	Background - Financial Grid 980px wide, 681px tall
ँ च Expand All	~ র Expand All
Cancel	Add

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	Export Image	
O Financial	2372px wide, 1636px tall	
Marketing	IMG_4943	
○ Sales	4032px wide, 3024px tall	
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.



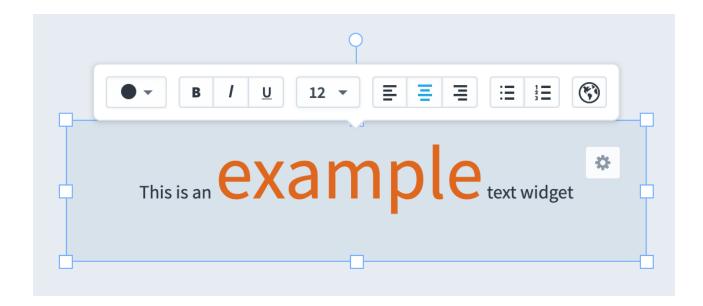
Using Images for Backgrounds

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

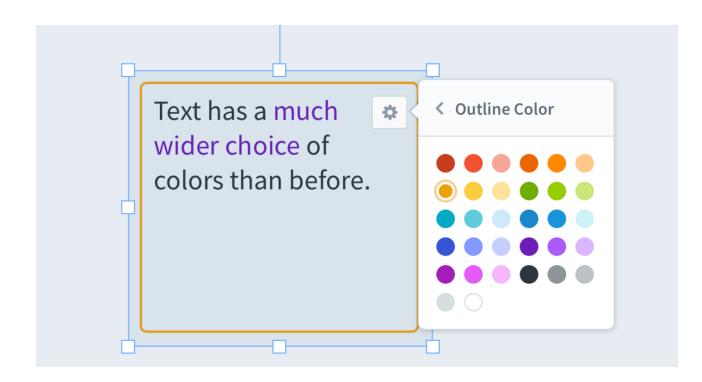
Overview

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



Outlines

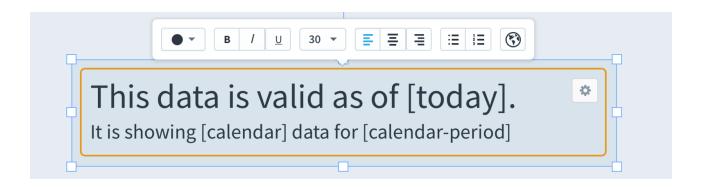
You can choose an outline color for your text widget as well as the outline thickness.



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.

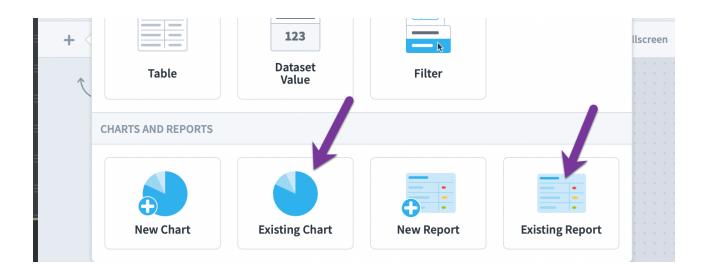
This data is valid as of Apr 8, 2019.

It is showing Monthly data for March 2019

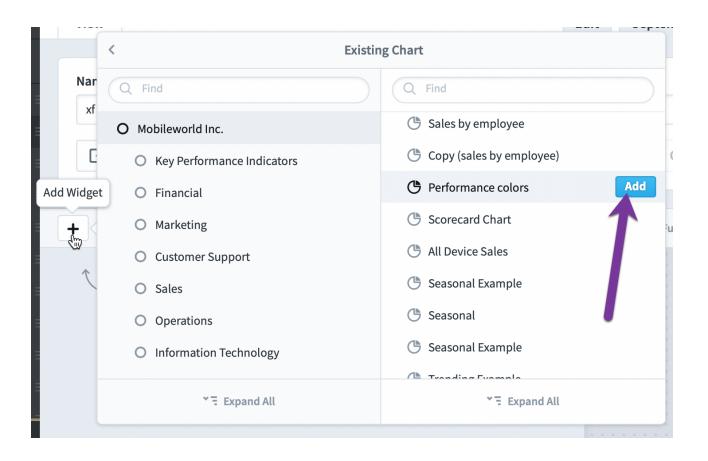
Chart and Report Widgets

Adding an Existing Chart or Report

To add an existing chart or report to your dashboard, choose one of these items at the bottom of the Add Widget menu.

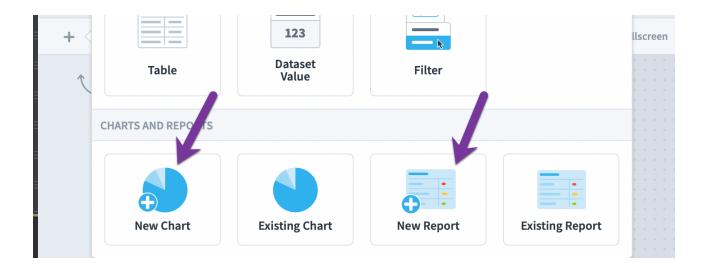


Then, just choose a chart or report that you've already created in the Charts or Reports sections. Impact will copy this chart or report to your dashboard. Any changes you make to your new dashboard widget will not affect the original item that you copied.

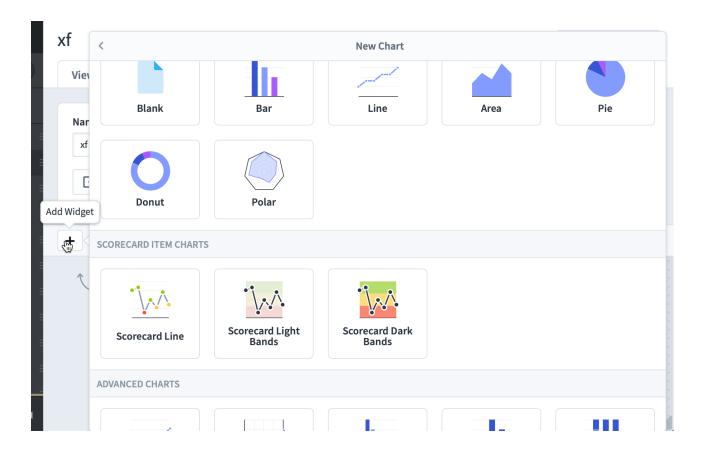


Creating a New Chart or Report

If you want to start from scratch, just choose New Chart or New Report from the menu.



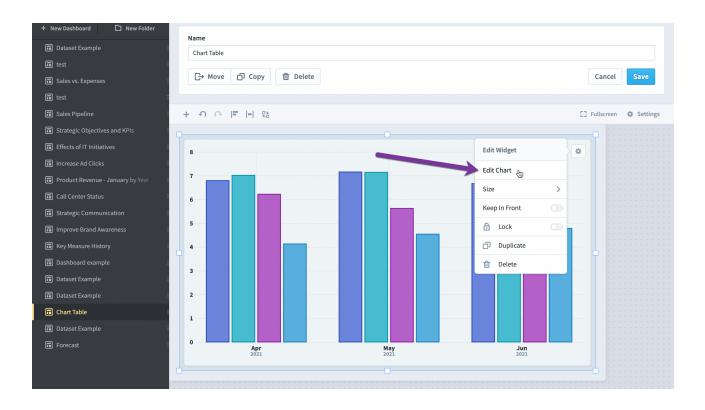
You can then choose which chart of report type you want. These are the identical options you'll see in the Charts and Reports sections.



Name			_
New Report: Ch	noose a Type		
			SQL
Scorecards	Initiatives	Datasets	SQL
			_
Cancel			Next

Editing a Chart or Report Widget

Charts and reports on dashboards are edited in a full-screen dialog. Here we're choosing "Edit Chart" on a dashboard widget.



The dialog that opens has <u>all of the chart building functionality</u> from the Charts section. You can see the changes you make to your chart instantly.



Similarly, you can choose "Edit Report" on a report widget.

🖬 test	керон						
 Sales vs. Expenses 	G→ Move D Copy	🛍 Delete					Cano
🖬 test							
Sales Pipeline	+ • • = = =					1	[] Fullscre
Strategic Objectives and KPIs	.						
Effects of IT Initiatives		DECODIDEION	JUNE 2021		OWNE	Edit Widget	
Increase Ad Clicks	NAME	DESCRIPTION	KPI VALUE	KPI VALUE	OWNE	_ Edit Report	
Product Revenue - January by Year Gall Center Status	Total Revenue	This measure sums: - Product Revenue - Training Revenue	\$698K	\$698K		Set Report Title	
Strategic Communication		- Book Revenue				Font Size Adjustme	ent >
Improve Brand Awareness	Retail Sales		\$427K	\$427K		Cell Margin Size	>
Key Measure History	US Sales \$		\$337K	\$337K		Background	>
Dashboard example	US Sales \$		\$337К	\$337K		Size	>
🖬 Dataset Example	Canada Sales					Column Headers	
Dataset Example	Canada Sales \$		\$82.7K	\$82.7K		Keep In Front	0
🖬 Chart Table 🛛	SEO Project Spend to Date		232K	232K		🔒 Lock	
Dataset Example						Duplicate	
ForecastReport						💼 Delete	

Again, you build reports here <u>exactly the same way</u> as you do in the Reports section.

phileworld Inc. Example		< Do	nort								
Edit Report											
ROW FILTERS											+ Add
Specific Scorecard Items: i	s any of the following: M	obileworld Ba	lanced Scoreca	ard and descene	ants	Color: is	s any of the follow	ing: Red between	Current Period	and Current Per	iod
Scorecard Item Type: is an	y of the following: KPI										
NAME	DESCRIPTION	JUNE 2021		OWNERS							
		KPI VALUE	KPI VALUE								
Total Revenue	This measure sums: - Product Revenue - Training Revenue - Book Revenue	\$698K	\$698K								
Retail Sales		\$427K	\$427K								
US Sales \$		\$337K	\$337K								
		·	·								
Canada Sales											
Canada Sales \$		\$82.7K	\$82.7K								
SEO Project Spend to Date		232K	232K							ħ	
Canaal											Con
Cancel											Sav

Report Font Size

You can adjust the overall font size for report widgets. By default, they show with no font size adjustment.

					< Font Size Adjustm
					-6
—					-5
	SALES EMPLOYEE	SALE DATE	SALE PRICE	SALES DEPARTMEN	-4
	Delphine Calmes	Jan 1, 2016	\$482.91	Retail	-3
	Delphine Calmes	Jan 2, 2016	\$509.30	Retail	-1
	Delphine Calmes	Jan 3, 2016	\$736.60	Retail	✓ 0
	Delphine Calmes	Jan 4, 2016	\$889.01	Retail	1
	Delphine Calmes	Jan 4, 2016	\$742.89	Retail	2
	Delphine Calmes	Jan 4, 2016	\$616.63	Retail	4
	Delphine Calmes	Jan 5, 2016	\$509.98	Retail	6
	Dolphino Colmos	lan 6 2016	ç363 04	Potoil	
					10

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

					< Font Size Adjustm
		-6			
-		-5			
	SALES EMPLOYEE	SALE DATE	SALE PRICE		-4
	Delphine Calmes	Jan 1, 2016	\$482.91	Retail	-3 -1
	Delphine Calmes	Jan 2, 2016	\$509.30	Retail	0
	Delphine Calmes	Jan 3, 2016	\$736.60	Retail	2
	Delphine Calmes	Jan 4, 2016	\$889.01	Retail	🗸 4 🖓
	Delphine	Jan 4,	\$742.89	Retail	6
Ċ-					10
					10

Report Cell Margin Size

Similarly, you can adjust report widgets' cell margins. By default they show with Large margins, which matches the Reports section.

		< (Cell Marg	in Size
SALE DEPARTN	.es Men 🌣	Sm	all dium	
etail				
etail		~	Large	
etail				
tail				

Here we've adjusted the margins to Small to be able to fit more content on our dashboard.

SALES EMPLOYEE	SALE DATE	SALE PRICE	SALES DEPARTM	🗸 Small
Delphine Calmes	Jan 1, 2016	\$482.91	Retail	Medium
Delphine Calmes	Jan 2, 2016	\$509.30	Retail	
Delphine Calmes	Jan 3, 2016	\$736.60	Retail	Large
Delphine Calmes	Jan 4, 2016	\$889.01	Retail	
Delphine Calmes	Jan 4, 2016	\$742.89	Retail	
Delphine Calmes	Jan 4, 2016	\$616.63	Retail	ф :::::::::
Delphine Calmes	Jan 5, 2016	\$509.98	Retail	
Delphine Calmes	Jan 6, 2016	\$363.94	Retail	
Delphine Calmes	Jan 7, 2016	\$460.80	Retail	
Delphine Calmes	Jan 8, 2016	\$613.17	Retail	
Delphine Calmes	Jan 10, 2016	\$650.70	Retail	
Delphine Calmes	Jan 10, 2016	\$721.10	Retail	

Dataset Widgets

Dataset table widgets

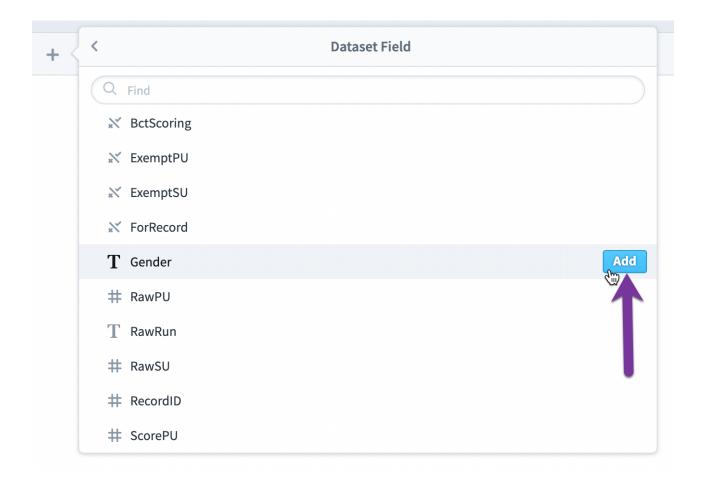
The first type of dashboard widget we'll add is the Datasets Table widget. To do this, we'll click the + button in the upper left corner and choose the Table widget in the Datasets section.

Gantt	Initiative Notes	Initiative Chart	
DATASETS			
	123		
Table	Dataset Value	Filter	
CHARTS AND REPORTS			

Then we'll choose the Fitness Tests dataset.

+ < <	Та	ble		
Q Fin	d	Q	Find	
O SPI	DER IMPACT	\bigcirc	Device Sales	
0	YOUR TRIAL ENVIRONMENT	\Diamond	Fitness Tests	Choose
•	Mobileworld Inc. Example	\Diamond	Customers	
(Key Measures	\bigcirc	Fakes Sales Data	
(Financial			
() Marketing			•
(Customer Support			
(C Sales			
	¥∃ Expand All		¥∃ Expand All	

Then click the "add" button for the Age and Gender fields.



This adds two field tables to our dashboard canvas. They're exactly the same as the tables that we're used to seeing on the Datasets Explore tab, except that we can drag and resize them on our freeform dashboard canvas.

AGE	NUMBER OF TESTS	TESTS %			
Less than 18	331	0.1%	P		
18 to 26	160K	48%	GENDER	NUMBER OF TESTS	TEST
10 10 20	TOOL	4070	М	277K	83.2%
27 to 35	98.1K	29.5%	F	55.9K	16.8%
36 to 49	63.4K	19%			10.070
50+	11.3K	3.4%			
50+	11.5N	5.4%0			

We can change all kinds of widget formatting options like background, font size, and rounding of numbers.

p -				-0		
	AGE	NUMBER OF TESTS	TES	Sackground		
	Less than 18	331	0.1%	✓ Solid	OF TESTS	TESTS %
	18 to 26	160K	48%		_	83.2%
þ	27 to 35	98.1K	29.5%	Translucent		16.8%
-	36 to 49	63.4K	19%	None		10.870
	50+	11.3K	3.4%			

This is what it looks like when we save and click to the Dashboards View tab.

iew				Edit May	/ 2019 🔻 <
AGE	NUMBER OF TESTS	TESTS %	GENDER	NUMBER OF TESTS	TESTS %
Less than 18	331	0.1%	Μ	277K	83.2%
18 to 26	160K	48%	F	55.9K	16.8%
27 to 35	98.1K	29.5%			
36 to 49	63.4K	19%			
50+	11.3K	3.4%			

Just like on the Datasets Explore tab, when you click on a row in a Dataset Table widget, it filters all of the results on the dashboard including the other widgets.

				Edit May	y 2019 👻 < 💈
AGE	NUMBER OF TESTS	TESTS %	< Back	is F	
Less than 18	105	0.2%	GENDER	NUMBER OF TESTS	TESTS %
18 to 26	28.2K	50.5%	F	55.9K	100%
27 to 35	16K	28.6%			
36 to 49	9,707	17.4%			
50+	1,881	3.4%			

Dataset value widgets

The next type of widget that we'll add to the dashboard are Dataset Value widgets. These are similar to Dataset Table widgets except that they only show a single value.

t.	Gantt	Initiative Notes	Initiative Chart	
	DATASETS			
		123		
=	Table	Dataset Value	Filter	
	CHARTS AND REPORTS			
=				•

In this example we'll add the average sit-up score, the average push-up score, the average run score, and the total number of tests.

AVERAGE SCORE RU	UN	AVERAGE SC	ORE SIT-UPS	AVERAGE S	CORE PUSH-UPS	NUMBER OF TESTS
63.1		75	5.3	7	9.3	333K
AGE	NUMBE	ER OF TESTS	TESTS %	GENDER	NUMBER OF TESTS	S TESTS %
Less than 18	331		0.1%	М	277K	83.2%
18 to 26	160K		48%	F	55.9K	16.8%
27 to 35	98.1K	(29.5%			
36 to 49	63.4K	(19%			
50+	11.3K		3.4%			

As before, if you click on a row in a table widget, all of the widgets on the dashboard update with new values, including the Single Value widgets.

View				Edit	May 2019 👻 <
AVERAGE SCORE RUN	AVERAGE SCO	ORE SIT-UPS	AVERAGE SC	ORE PUSH-UPS	NUMBER OF TESTS
65.6	75	75.5		9.6	160K
< Back in 18 to 26			GENDER	NUMBER OF TEST	S TESTS %
AGE	NUMBER OF TESTS	TESTS %	М	132K	82.3%
21	20.7K	12.9%	F	28.2K	17.7%
20	20.4K	12.8%			
22	19.5K	12.2%			
23	19.3K	12.1%			

Dataset filter widgets

Another type of dataset dashboard widget are Dataset Filter widgets. They allow you to quickly apply filters to your dashboard, without taking up as much space as a Dataset Table widget.

View			.			Edit	Jui	ne 2019 👻 < 🛇
Gender is any	▼ Ch	oose		Chai	in of Comman	d is any 👻	Choos	e
AVERAGE SCORE RU	JN	AVERAGE SC	ORE SIT-UPS		AVERAGE SCO	RE PUSH-UPS	NU	MBER OF TESTS
63.1		75	5.3		79	9.3		333K
AGE	NUMBI	ER OF TESTS	TESTS %		GENDER	NUMBER OF TE	STS	TESTS %
Less than 18	331		0.1%		М	277K		83.2%
18 to 26	160K		48%		F	55.9K		16.8%
27 to 35	98.1K	ζ.	29.5%					
36 to 49	63.4K	(19%					
50+	11.3K	(3.4%					

Here we've clicked on the Gender dataset filter widget and we've applied a filter of Male.

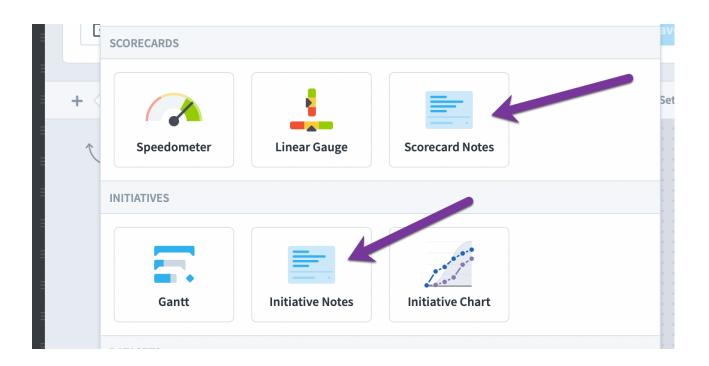
Gender is any	M			Chai	in of Comman	d is any 👻	Choose	
AVERAGE SCORE R	JN	AVERAGE SC	ORE SIT-UPS		AVERAGE SCO	RE PUSH-UPS	NUM	IBER OF TESTS
63.4		76	5.2		79.5		277K	
AGE	NUMBI	ER OF TESTS	TESTS %		GENDER	NUMBER OF TESTS	S	TESTS %
Less than 18	226		0.1%		М	277K		100%
18 to 26	132K		47.5%					
27 to 35	82.2K	(29.7%					
			19.4%					

Turning off the filter type allows filter widgets to be even more compact.

Gender Choose	Edit Widget
	Edit Filter
	Set Title
	Background
	Size >
	Show Filter Type
	Keep In Front
	🔒 Lock
	Duplicate
	💼 Delete

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.

NOT	ES (2) — MOBILEWORLD BAI	LANCED SCORECARD		🔅 < Display A	S
		Our warehouse is finally up	Our churn numbers g	Full notes	
	+ Add Note	and running at full capacity. Special thanks to Bob	completely out of con February. We had so	Abbrevia	ated tiles
	T Add Note	Mitchell and Jane Smith	press that we're in th	e	
		10 HOURS AGO	2 YEARS AGO	🗊 1 🛛 👘 🖓 🖓 💭	

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

Trial U Posted	i ser : a year ago	🖍 Edit
Applies To	Ill Time Customer Churn	
	nbers got completely out of control in February. We had ne process of reacting to.	some bad press
1 REPLY		
	uickScore Administrator 2 months ago	
Close		

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

IOTES (2) — MOBILEWORLD BALANCED SCORECARD	+ 🎄 < K Display As
QuickScore Administrator Applie Posted 10 hours ago, updated 10 hours later March	
Our warehouse is finally up and running at full capacity. Sp Jane Smith for your excellent work getting the machinery i	
F REPLIES (0)	+ Add reply
Trial User Posted 2 years ago	Applies To All Time Customer Churn
Our churn numbers got completely out of control in Februa we're in the process of reacting to.	ary. We had some bad press that
EPLIES (1)	+ Add reply
QuickScore Administrator a year ago, updated 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.

	\$	Showing
QuickScore Administrator Posted 10 hours ago, updated 10 hours later	Applies To March 2019 Mobileworld Balanced Scorecard	Title
Our warehouse is finally up and running at full capac	Controls	
Jane Smith for your excellent work getting the machinery in place by Q1.		Date
		Replies
Trial User Posted 2 years ago	Applies To All Time Customer Churn	Author
Our churn numbers got completely out of control in	Calendar Period	
we're in the process of reacting to.		Scorecard Item
		Notes from Descendants

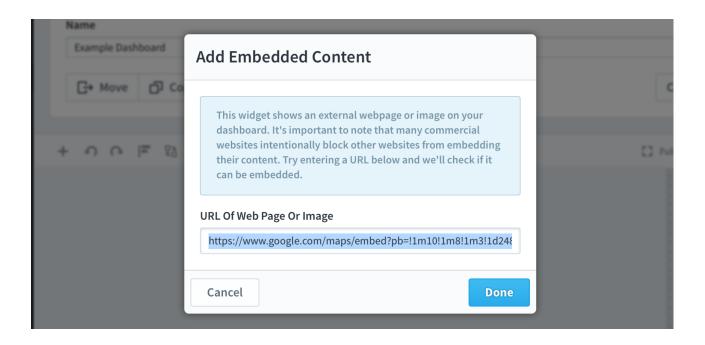
Embedded Content Widgets

Adding an Embedded Content Widget

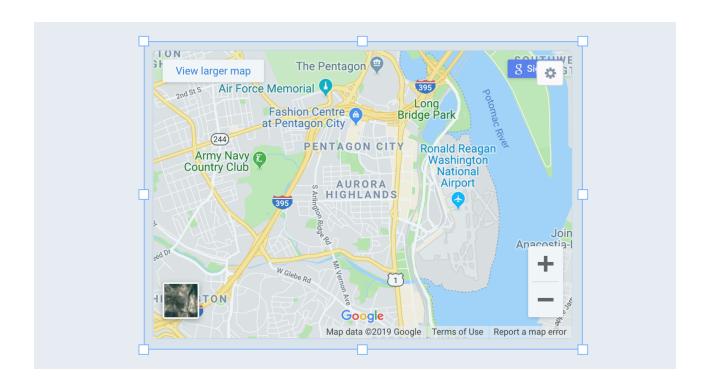
You can add an embedded content widget from the "add widget" menu.

<u>ଚ</u> ଜ				
		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.

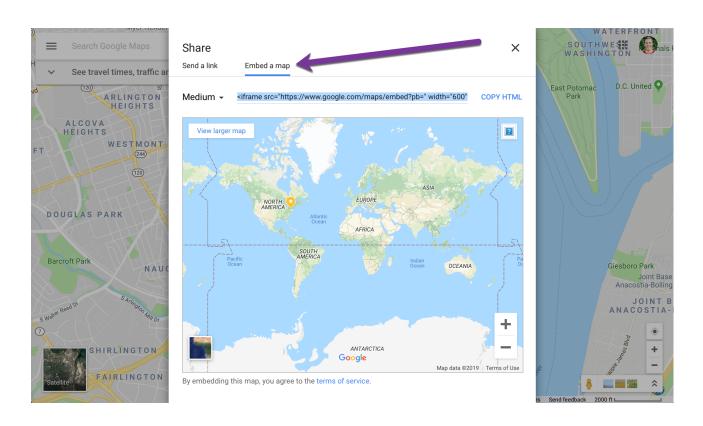


Spider Impact will then show that website or image in a resizable widget.



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.

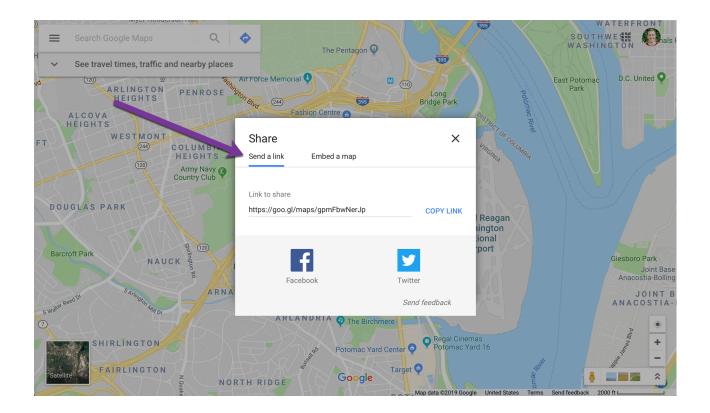
When we copy and paste that code, we get this:

```
<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		
F O O IF 83	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
	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	
	Cancel	

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
중 Bookmarks	Import Connections	No -	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	AUTHENTICATION SETTINGS
Q 🗳 🔒	1	3 Color	Cancel Save
			Sallet

Charts

Overview of Charts

The basics

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

Creating a chart

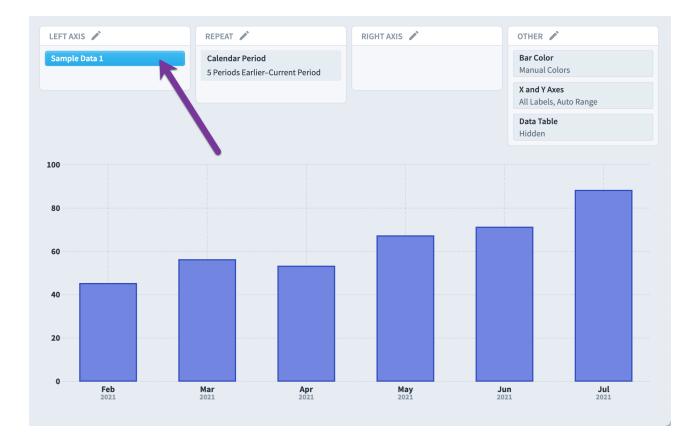
To create a chart, go to the Charts section and click the "New Chart" button.

D Mobileworld Inc.		Seasonal Example	0 A C
PERSONAL	Q Find	View	Edit July 2021 👻 < >
요 Home 31	+ New Chart	- Marcine - Contract -	
PRESENTATION	🕒 Scorecard Chart	Name Seasonal Example	
Briefings	🕒 test	[→ Move [] Copy 💼 Delete	Cancel Save
Dashboards Reports	() Waffle	Er more Er oop,	

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

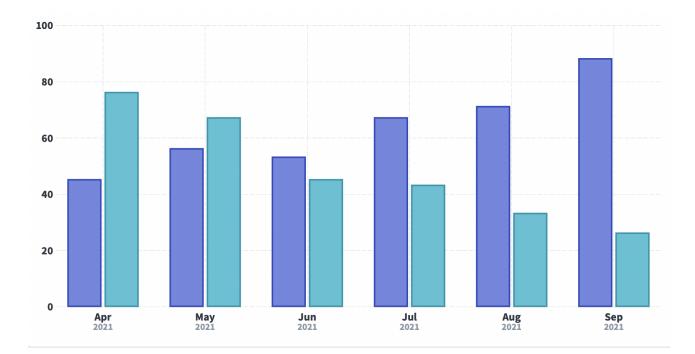
🛍 Mobileworld	Inc. Example <	Example Chart	
PERSONAL	Q Find	View	Edit
ည် Home 1	+ New Chart 🗅 New Folder		
☆ Bookmarks	🕒 Ad Clicks	Name	
		Example Chart	
Briefings	C Example Chart		
Strategy Maps	🕒 Ad Clicks Copy 🛛	Starting Layout	
Dashboards	🕒 reference lines 🗧	BASIC CHARTS	
Reports	🕒 4 color 2 green 🗧		
🕒 Charts	🕒 Bar Stacks 🛛 🗎)
	Product Revenue - January by Year	Blank Bar Line Area Pie Donut Polar	
Scorecards	🕒 Bar Chart 🛛		
✓ Initiatives	🕒 Blank 🛛	SCORECARD ITEM CHARTS	
🗘 Datasets	🕒 Blank2 🛛		
🖺 Forms	🕒 test		
🖒 Files	🕒 Pie		
	🕒 Lines 🗧	Scorecard Scorecard Scorecard Line Light Bands Dark Bands	
	🕒 Polar 🗧	ADVANCED CHARTS	
	🕒 Treemap 🗧		
	🕒 Line		
	🕒 auto range? 🛛 🗄		
	🕒 Dataset Chart 🗧	Multiple Lines Dual Axis Multiple Bar Stacked Bar Bar Multiple Bar Stacked A	Area
	🕒 Dataset Chart 🗧		
		COMBINATION CHARTS	
Q 🌣 🖪	শের Expand All 🖌 ✔ Done ┥	Cancel	Create

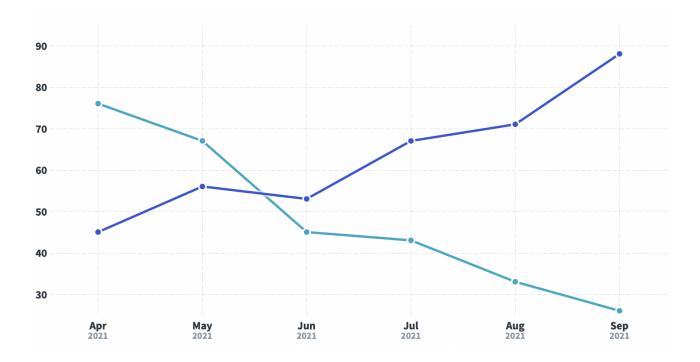
If you choose a pre-built chart example, you'll see a fully finished version of your chart with sample data. This allows you to build visualizations based on how they look rather than focusing on getting the data exactly right from the beginning. All sample data series are marked blue.

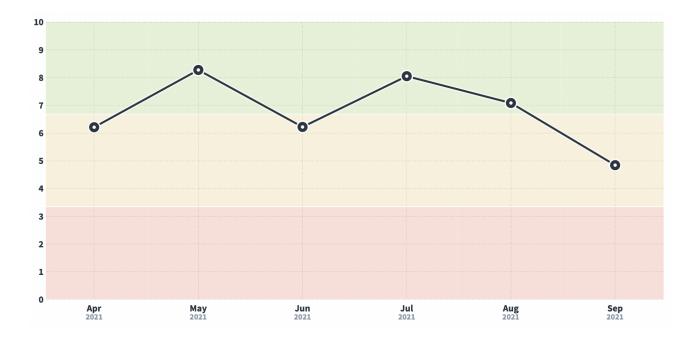


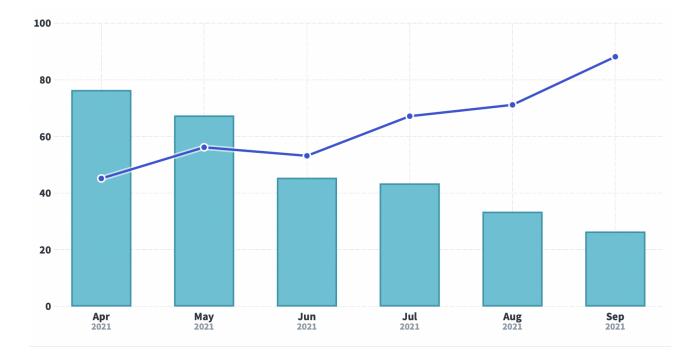
Example charts

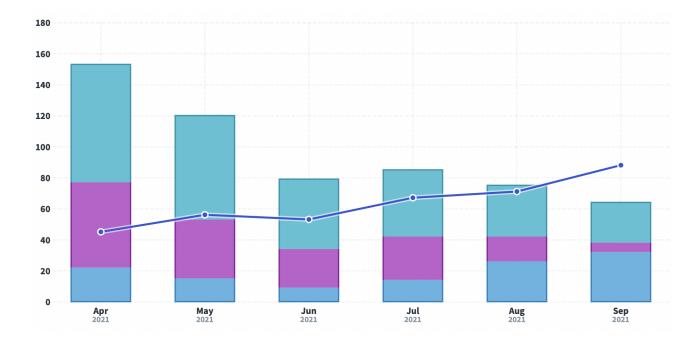
The most popular charts are line, bar, and area charts. These three types of data series can be combined on the same chart.

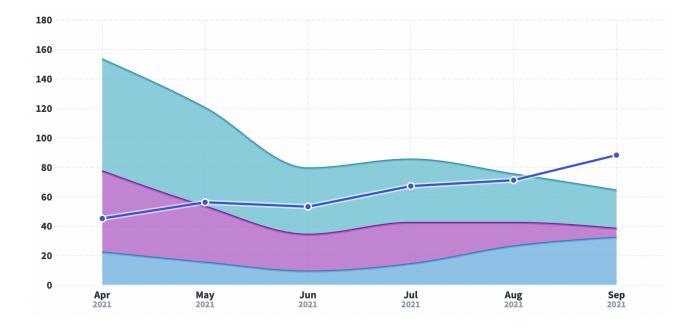




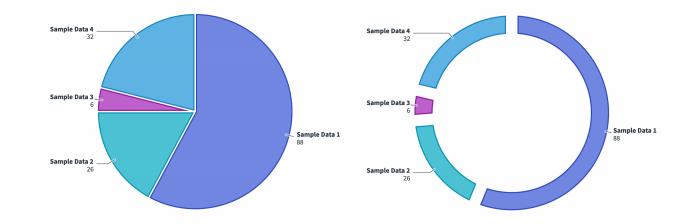








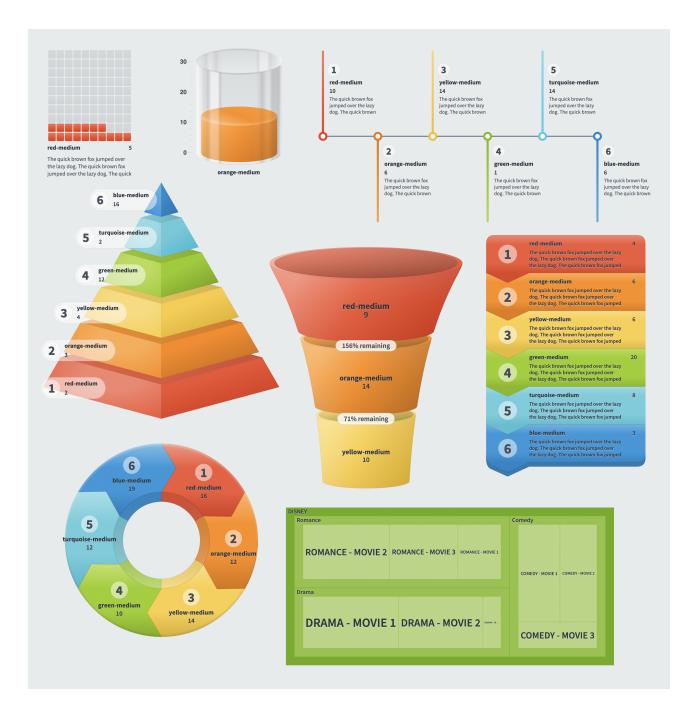
Pie and donut charts visualize pieces of a whole.



Polar charts help show cycles and scientific data.



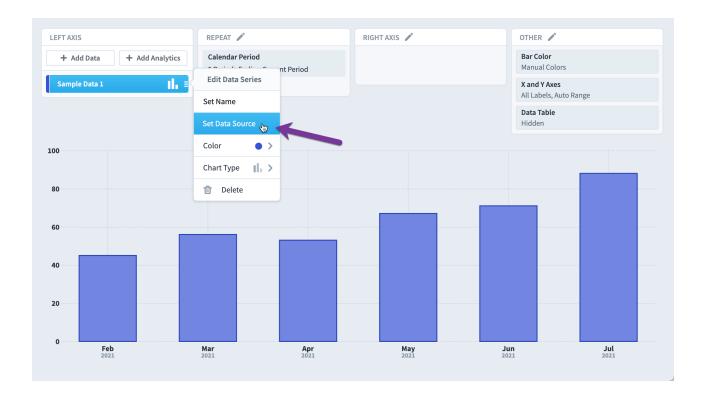
Diagram charts look best on dashboards, and they present infographic-style visualizations.



Building Charts

Editing chart data

Whenever you're ready to see your own data on the chart, just edit the data source on a sample data series. In this example there's a sample bar series on the left axis, so we'll click on it and choose "Set Data Source".



This allows you to choose to show any type of data from scorecard items, initiative items, or dataset fields. We'll choose to show the KPI Value for Product Revenue.

е 🗇 Сору	會 Delete		
_	Set Data Source		
ata 🕂 Add A	Item Type		/
	Scorecard Initiative Dataset		
	Type Basic Calculated		
	Scorecard Item Product Revenue	ŕ	1
	Field KPI Value	•	
	Cancel	Done	

Now our chart is showing real data. All that's changed is the height of the bars.



Adding chart data

You can also add data series to your chart one at a time by clicking the "Add Data" button. Some chart types will ask what kind of data series you want. In this example the options are a new Line, Bar, or Area data series. We'll choose Bar.

LEFT	AXIS		REPEAT		RIGHT AXIS 🧪	ОТ
+		Analytics	Calendar Period 5 Periods Earlier–Cu	rrent Period		Ba Ma
Pr	Add Data Series					X a All
	∘ _° ° Line	>				Da
	📕 Bar 💮	>				Hid
	м Area	>				
\$600						

Next, choose where in Impact to get your data. You can choose a scorecard item like a KPI, an initiative, or low-level data from a dataset. We'll choose Scorecard ltem.

+ Add Data + Add Analytics	REPEAT Calendar Period	RIGHT AXIS 🧪	O B M
Pr < Bar			X A
i Initiative			D H
🕅 Dataset 💦 🔪			

From here you can add bars directly to the chart. Every time you click the add button, it adds a bar for that scorecard item.

LEFT AXI	IS	REPEAT		RIGHT AXIS 🧪	•	
+ Ac	dd Data + Add Analytics	Calendar 5 Periods	Period Farlier_Current Period			
Pr <		Scorec	ard Item			
	Q Find		Q Find			
	Mobileworld Inc.		Mobileworld Scorecard			
	Key Performance Indicators		 Financial 			
600	Financial		 Increase Revenue 			
500	Marketing		Ø Product Revenue			
	Customer Support		𝔄 Training Revenue	Add		
400	Sales		Ø Book Revenue	-		
3001	Operations		O Total Revenue			
	Information Technology		> Improve Profitability			
200	*∃ Expand All		*등 Expand All			
100K	в ворчина ЛШ		• ••••••••			

After two clicks of the Add button, we have a chart that looks like this.

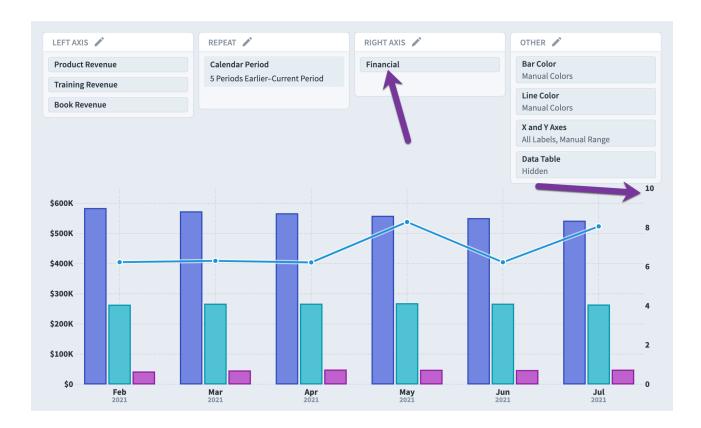


Right axis

Adding data to the right axis is exactly the same process. Here we'll add a line for a scorecard item's score.

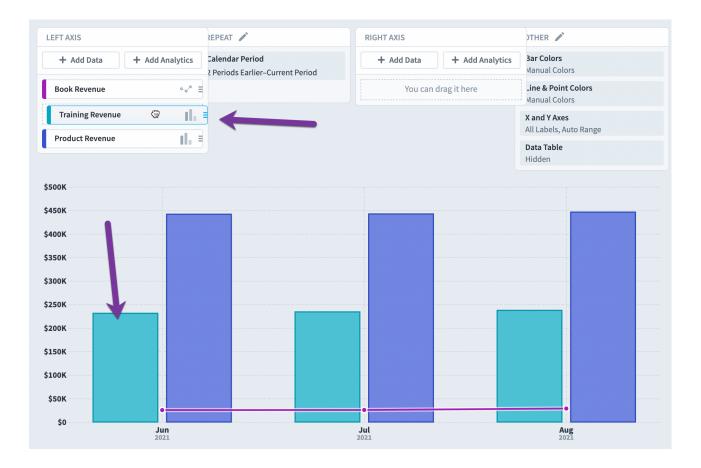
LEFT AX	is 🌶	REPEAT	1	RIGHT AXIS		OTHER 🎤	
Produc Train	t Revenue	Calendar 5 Periods	Period Farlier-Current Period	+ Add Data	+ Add Analytics	Bar Color Manual Colors	
Book	<	Scorec	ard Item	chart	ata above	X and Y Axes All Labels, Manual R	ange
	Find Mobileworld Inc.		C Find			Data Table Hidden	
	Key Performance Indicators		> Financial	Add			
	Financial		> 🔺 Customer				
600K	Marketing		> 🔺 Internal Processes				
500K	Customer Support		> 🔺 Organizational Capacity				
400K	Sales						
	Operations						
300K	Information Technology						
200K	*∃ Expand All		* 🗄 Expand All				
100K	-						

This 0-10 score line is now showing on the right axis while the three bars' \$100k+ Revenue are graphed on the left axis.

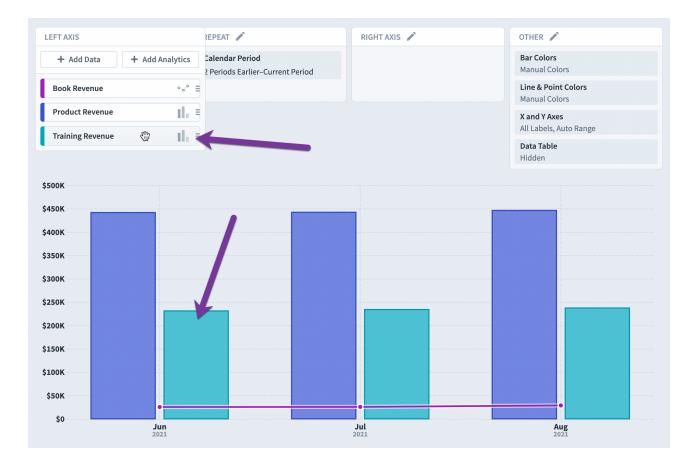


Reordering with drag and drop

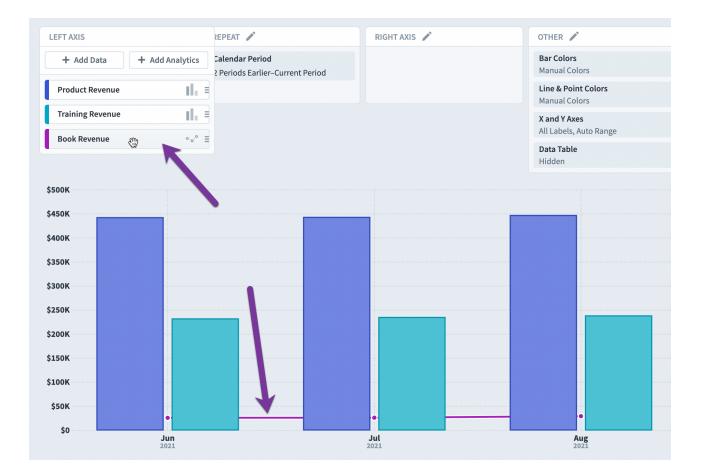
You can reorder anything on your chart by dragging and dropping. In this example, the Training Revenue bar comes before the Product Revenue bar.



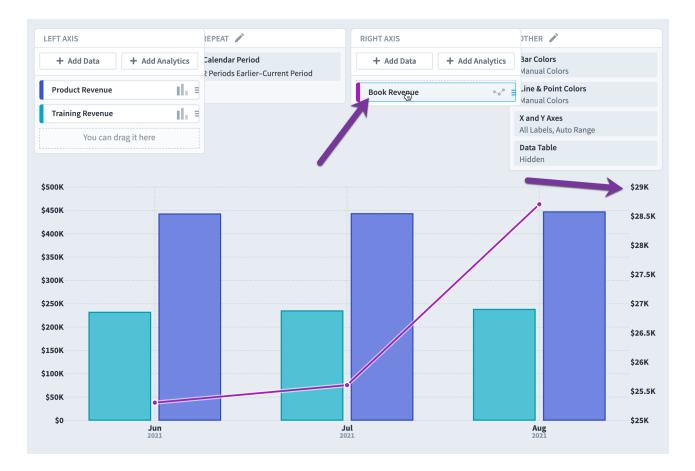
After moving Training Revenue to the bottom of the list, its bar is now on the right.



The order also affects the order above and below other items. Here we've moved the Book Revenue line to the bottom so that it's underneath the bars.



You can even drag items to the other axis. Here we've moved Book Revenue to the right axis so that it has its own scale.



Setting data series names

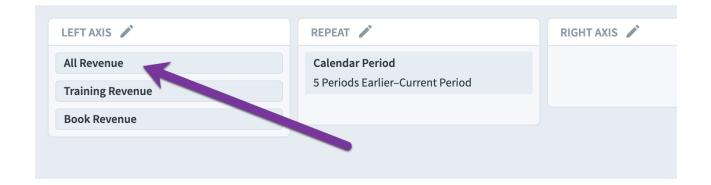
Data series names are used in various places like chart labels, tooltips, and legends. Spider Impact chooses a default name for each data series, but you can override this by choosing Set Name in the edit tooltip.

LEFT AXIS		REPEAT 🖍			RIGHT AXIS 🎤
+ Add Data + Add A	nalytics	Calendar Pe		nt Period	
Product Revenue 🧤		Edit Data Se		it i chou	
Training Revenue	lh ≡	Set Name			
Book Revenue	II. E	Set Data Sour	rce		
		Color	• >		
cook		Chart Type	11. >		
\$600K		💼 Delete			
\$500K					

Here we've decided to change the Product Revenue scorecard item's name on the chart to All Revenue.

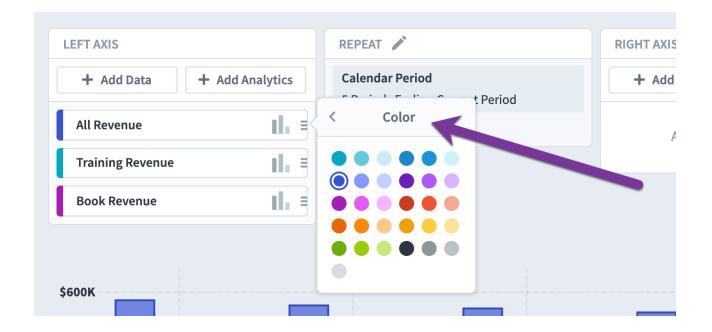
+ Add Ana	Set Name	lendar Period			
	NAME TYPE	Default	Custom		
	Data Series N All Revenue	lame			
	Cancel			Done	

This new name is now used everywhere for that data series.



Setting colors

By default, chart data series use automatically assigned colors. You can also choose to manually change any automatically assigned color.



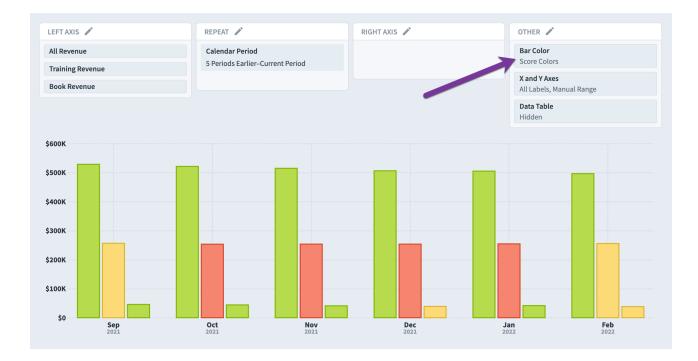
You can choose a different way to color the data series, however. In this example we're going to click on Bar Colors in the Other panel.

	RIGHT AXIS 🇪	OTHER
nt Period		Bar Colors Manual Colors
		X and Y Axes All Labels, Manual Range
		Data Table Hidden

And we'll change from Manual to Score.

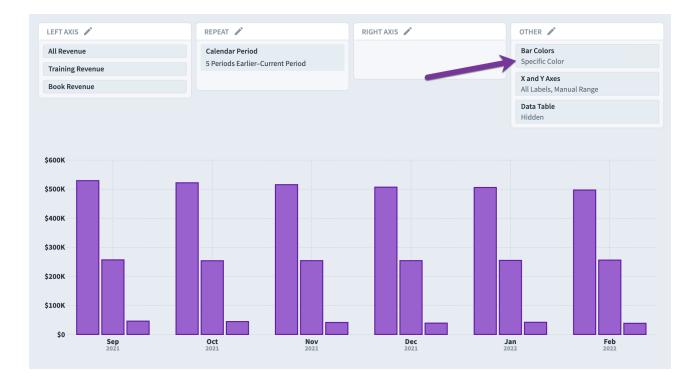
ľ	Set Bar Col	ors			
	BAR COLORS	Manual Colors	Score Colors	Specific Color	
	Cancel				Done

This changes the bars to be colored based on each scorecard item's score for that period.



You can also force all the bars for all data series to a single color by choosing Specific Color. This is the same as manually setting all data series to the same color individually.

AL.			Mont Aus /	
Set Bar Col	ors			
BAR COLORS	Manual Colors	Score Colors	Specific Color	
Color				
Cancel				Done

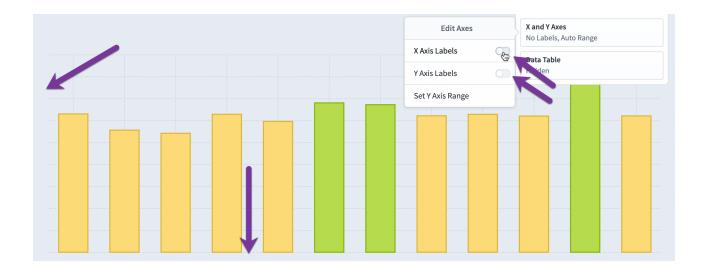


X and Y axes

You can configure a chart's axes through the X and Y Axes box in the Other panel.



The X and Y axis labels default to on, but you can turn one or both off here.



You can also set the Y axis range.



This opens a dialog where you can choose the chart's maximum and minimum Y axis values. By default, they're automatically set, but here we're overriding the maximum value to 50.

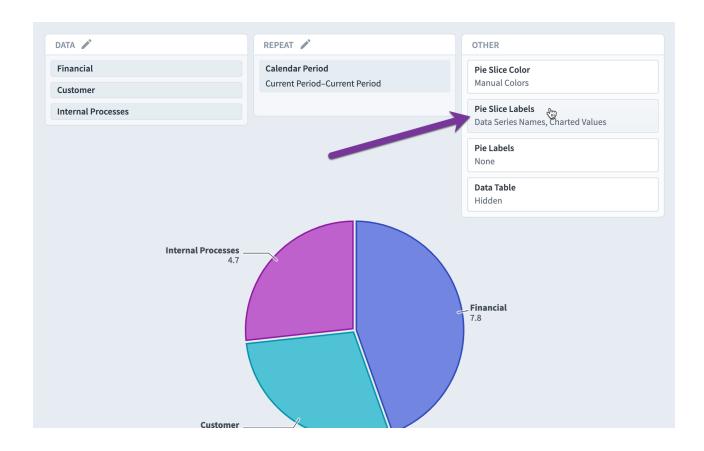
Copy 1	Set Y a	xis range	ge	
		Max		
			Y-AXIS LEFT	
		Min Auto	X-AXIS IS AUTO GENERATED	
	Cancel		Done	

As you can see, the chart now shows a maximum value of 50, regardless of what data is being graphed.



Chart labels

Most chart types have labels that you can configure. In this pie chart example, you can see a Pie Slice Labels option in the Other menu.

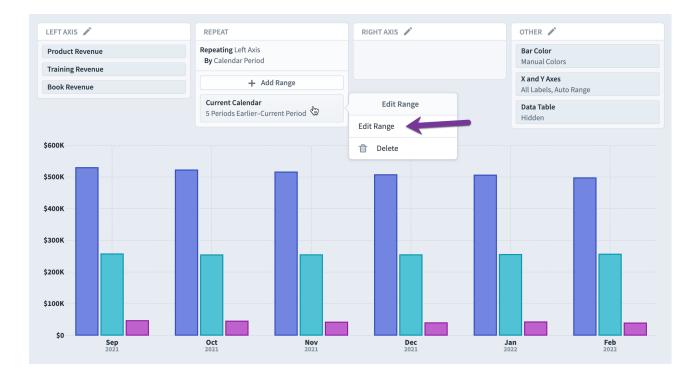


When we click it, we can see the various label options, including the ability to show percentages and abbreviated chart values.

	DATA /	REPEAT #
	Edit Pie Slice Labels	ent Period
- 1	🗸 Data Series Names	
- 1	Percentages	
- 1	✓ Charted Values	
	Abbreviate Charted Values	
- 1	Default Decimal Precision	•
	Cancel	Done

Repeating left & right axes

When you're graphing scorecard items, you'll always be able to set your calendar period range in the Repeat panel. Here we're showing 6 periods of data for three KPIs. We can edit the calendar period range by clicking on it and choosing "Edit Range".



This is the standard date range selector where you can choose either a range based on the current calendar, or choose a specific calendar and choose a relative or date range.

aduat Davanua		2				HT AXIS 🧨
aining Revenue	Range Type					
ook Revenue	Standar	rd Date Range	C	Group Similar Date R	anges	
юк	CALENDAR	Current Calendar				
юк	SHOW	5 Periods Earlier 👻	то	Current Period 💌		
юк	Cancel				Done	

You can even show data for multiple ranges. Here we're showing the data for the current month as well as the data for the month one year earlier.

LEFT AXIS 🧪	REPEAT	RIGHT AXIS 🧪	OTHER 🎤
Product Revenue	Repeating Left Axis By Calendar Period		Bar Color Manual Colors
Training Revenue			X and Y Axes
Book Revenue	+ Add Range		All Labels, Auto Range
	Monthly Current Month-Current Month		Data Table Hidden
	Monthly 12 Months Earlier–12 Months Earlier	-	
\$600K			
\$500K			
\$400K			
\$300K			
\$200K			
\$100K			
\$0	Aug 2021		Aug 2020

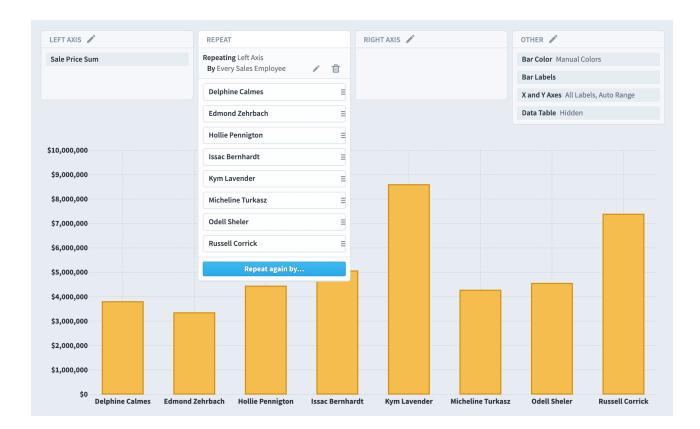
While scorecard items have a built-in repeating by calendar period, datasets and initiatives do not. In this dataset example, we have a single bar showing the total sales dollars for all time.

LEFT AXIS 🧪	REPEAT 🎤	RIGHT AXIS 🧪	OTHER 🎤
Sale Price Sum			Bar Color Manual Colors
			Bar Labels
			X and Y Axes All Labels, Auto Range
			Data Table Hidden
\$45,000,000			
\$40,000,000			
\$35,000,000			
\$30,000,000			
\$25,000,000			
\$20,000,000			
\$15,000,000			
\$10,000,000			
\$5,000,000			

Repeating values aren't required for datasets, but they are very useful. Here we're going to the Repeat panel and choosing to repeat by the Sales Employee field.

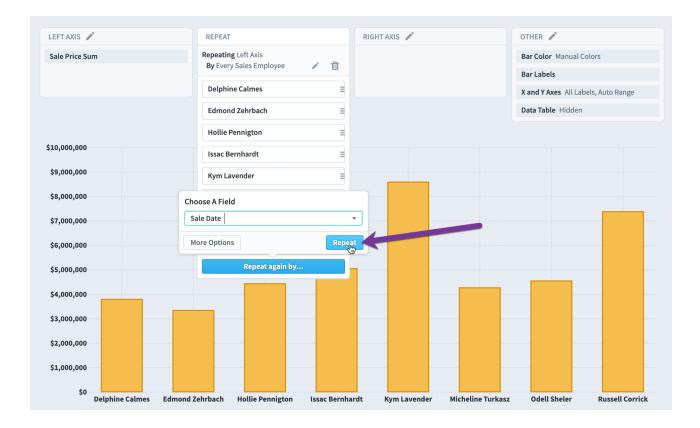
	Choose A Field Sales Employee	
LEFT AXIS 🧪	IGHT AXIS 🖋	OTHER 🧨
Sale Price Sum	More Options Repeat	Bar Color Manual Colors
	Repeat Left Axis by	Bar Labels
		X and Y Axes All Labels, Auto Range
		Data Table Hidden
\$45,000,000		
\$40,000,000		

We now have a separate bar showing the all-time sales totals for every employee. Whenever the dataset is updated to include new employees, they'll automatically show up in this chart.

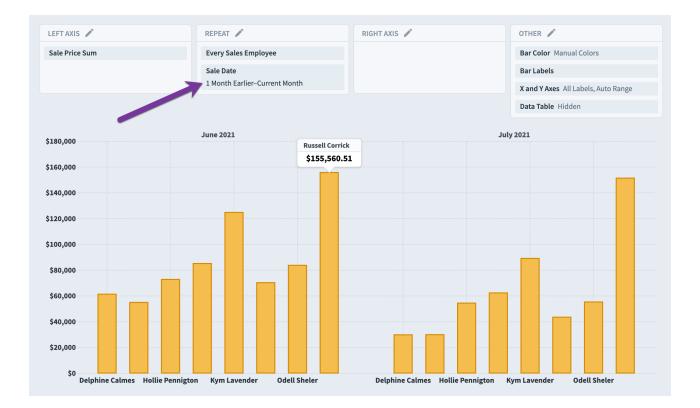


Repeating again

You can choose to repeat your data series a second time. To do this, click on the "Repeat again by..." button and choose a field. Here we're going to choose Sale Date.

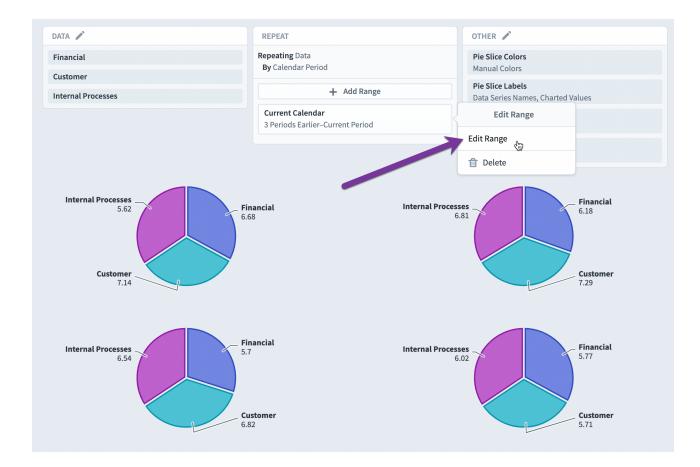


The chart is now showing the sales totals for the last two months for all employees.



Repeating non-axis charts

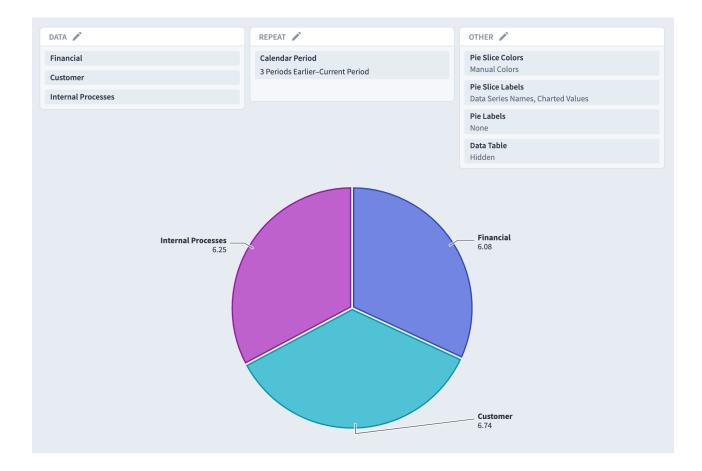
Repeating works the same for non-axis charts. In this example we're repeating three KPIs for four calendar periods. By default, each calendar period is its own pie chart, but you can change this by clicking on the calendar period range and choosing "Edit Range".



For non-axis charts there's a "Treat Range As" toggle, allowing you to show one chart for the entire range.

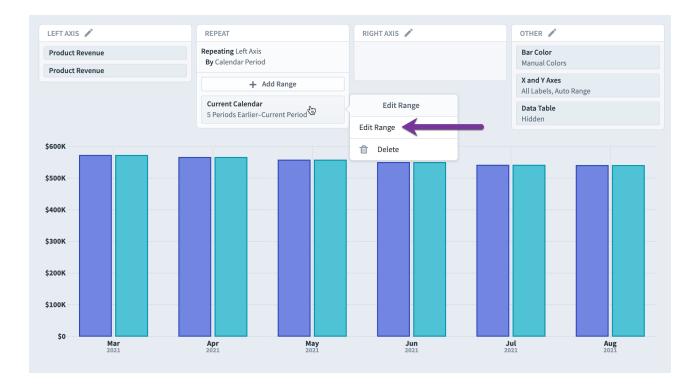
DATA						
Custon	Range Type					
Interna	Standard Da	te Range	Grou	ıp Similar Date Ra	nges	
	CALENDAR	Current Calenda	r 👻			
Int	SHOW	3 Periods Earlier	• то	Current Period	•	Inter
	TREAT RANGE AS	Multiple Charts	One Ch	art		
	Cancel				Done	

The result is this single pie chart that shows four periods of data.



Grouping similar date ranges

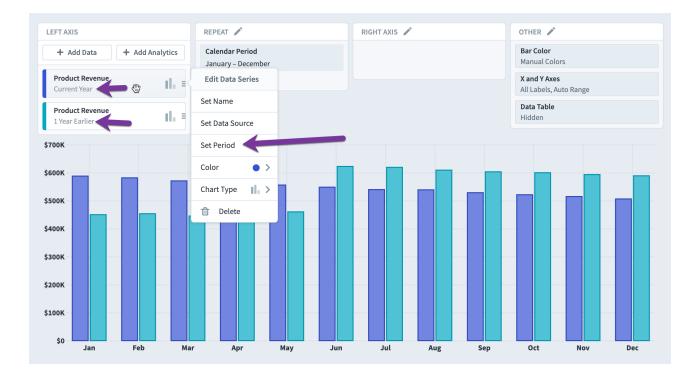
In addition to graphing standard date ranges like all the months in 2021, you can also graph data like months of the year or days of the week. In this example we have two identical data series for Product Revenue, and we'll choose "Edit Range".



We'll change to "Group Similar Date Ranges" and then choose to group yearly data by monthly.

C+ Move		
EFT AXIS 🧨	Edit Range	HT AXIS 🧨
Product Revenue	Range Type	ancial
Training Revenue		
Book Revenue	Standard Date Range Group Similar Date Ranges	
		J
500K	GROUP Yearly - DATA BY Monthly -	
	TYPE Relative By Date	
500K	SHOW January - TO December -	
400K		
300К	Cancel	

When we're done, we see a completely different kind of graph. As you can see, it now lists the months across the X axis but no years. Our chart now shows product revenue for the current year compared against product revenue for the previous year.



Every scorecard data series has a "Set Period" menu item. This only shows up when you've chosen to "Group Similar Date Ranges" and it allows you to choose which period to use for each data series. That's how we choose Product Revenue for this year vs. last year.

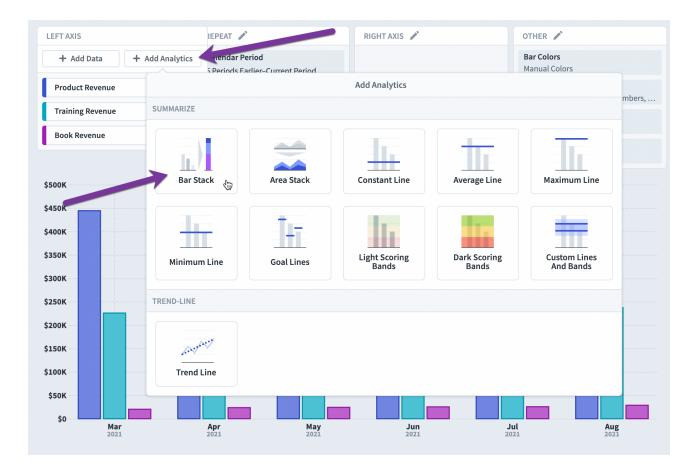
+ Add Data	Set Peri	od		
roduct Revenue urrent Year				
	CHOOSE	A YEAR		
roduct Revenue Year Earlier	ТҮРЕ	Relative	By Date	
ж	SHOW	Current Peri	od 👻	
	Cancel			Save
ж-				

There's no "Set Period" menu item for datasets. Instead, you can just choose which date range you want as a filter in the "Set Data Source" menu.

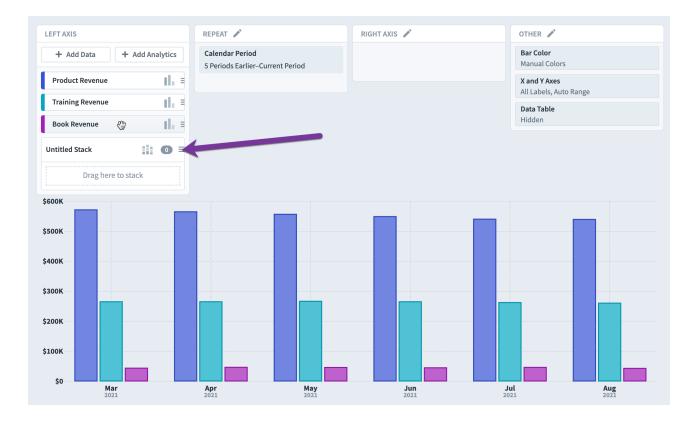
Item Type Scorecard Initiative	Dataset	
Type Basic Calcula	ted	
Dataset	<u>Go to</u>	Dataset
Customers		
Number of Customers		•
Decimal Precision	sion	•
FILTERS		+ Add
Customers with Sales m (Yearly))	natching (Device Sale Date: between Current Period and Current Perio	d
Cancel		Done

Bar and area stacks

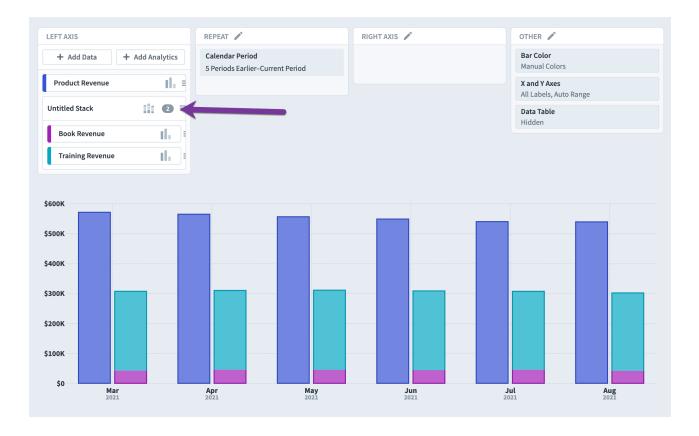
You can create bar or area stacks by choosing them from the "Add Analytics" menu on either the left or right axis.



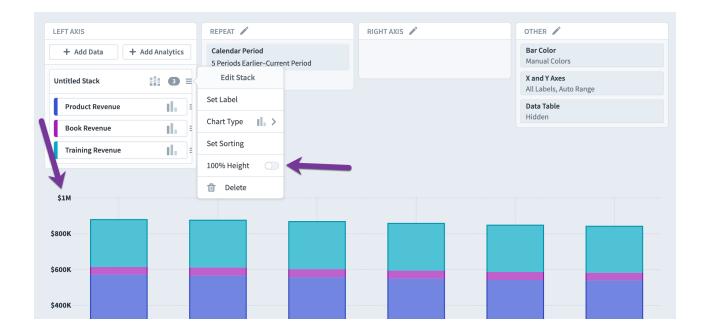
This adds an empty stack to the axis.



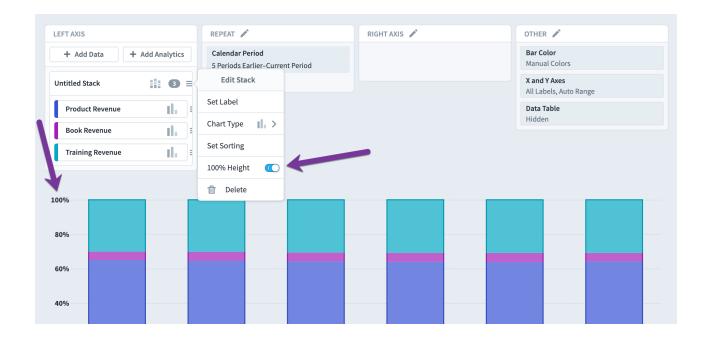
All you need to do is drag and drop data series into the stack. Here we've added book and training revenue to the stack while product revenue is its own bar. This allows you to have multiple stacks and non-stacked bars at the same time.



You can configure the stack by clicking on it. By default, 100% height is off, and you can see how the Y axis goes up to \$1M.



When we turn on the 100% Height toggle, the Y axis changes to percentages and all repeating stacks become full height.

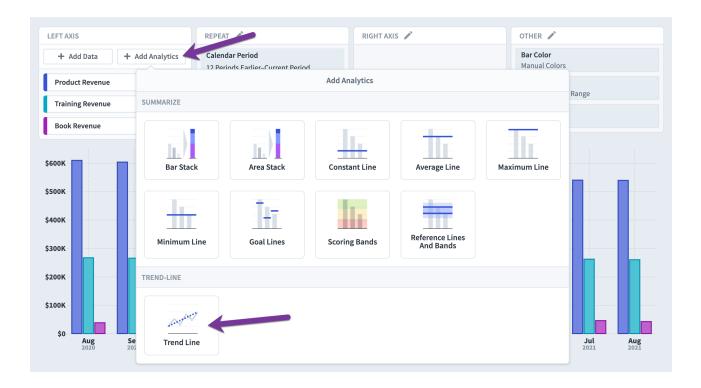


You can also change between Bar and Area stacks.

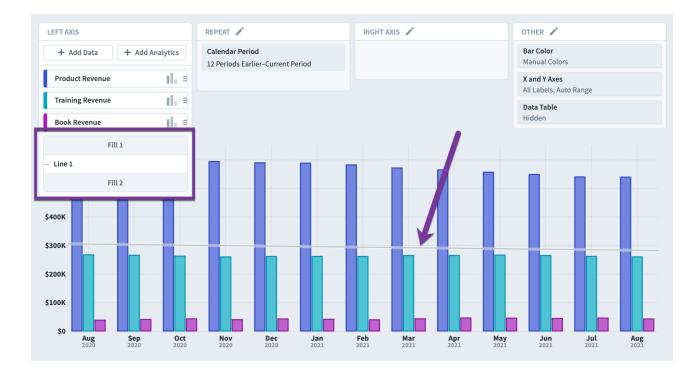
LEFT AXIS		REPEAT 🖍 RIGHT AXIS 🖍
+ Add Data + Add A		Calendar Period 5 Periods Earlier–Current Period Chart Type
Untitled Stack		✓ III Bar
Book Revenue		🖬 Area
Training Revenue	The st	

Trend lines

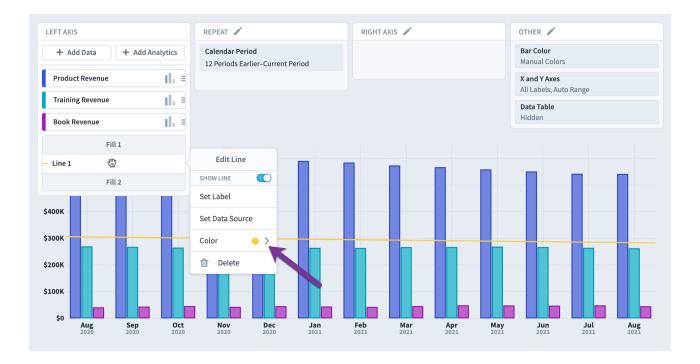
You can add a trend line from each axis' Add Analytics menu.



We now see a trend line object in the left axis panel. There's also a trend line showing each month's average of the three series.



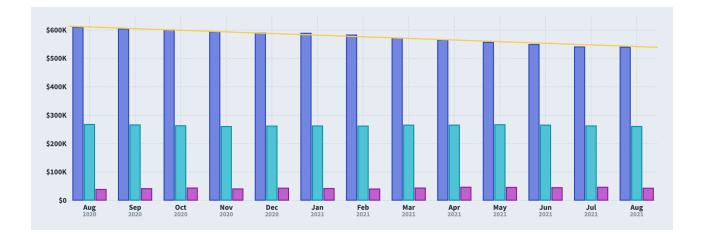
You can change the line's color.



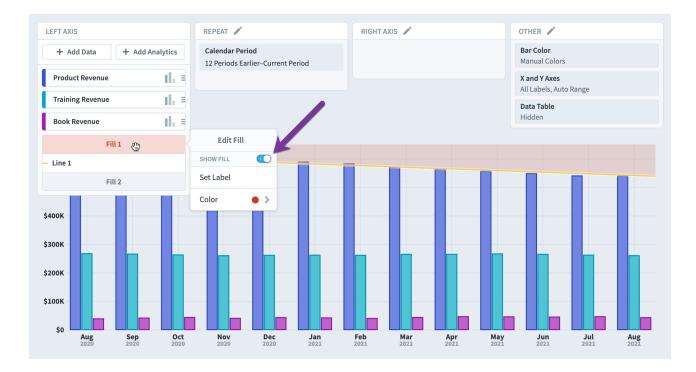
You can also set its data source. Here we're changing it to Product Revenue rather than All Data.

-	10 Decision Convert Decision	
Produc	Set Data Source	
Trainin	Line Data Source	
Book R	All Data 🔹	
	All Data 🗸	
- Line 1	Product Revenue	
	Training Revenue	
\$400K	Book Revenue	

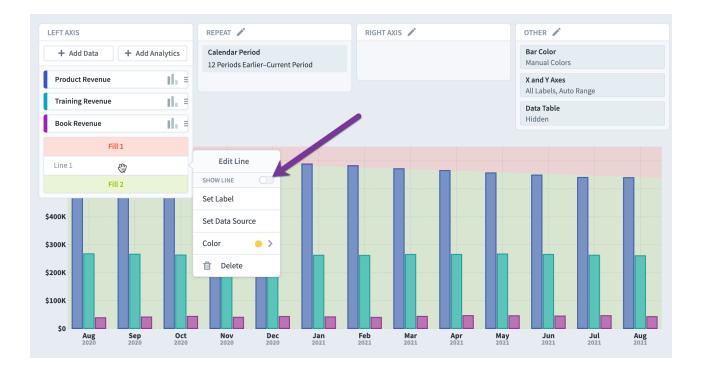
The chart now looks like this.



Trend lines have an optional fill above and below. Here we're filling red above the yellow trend line.

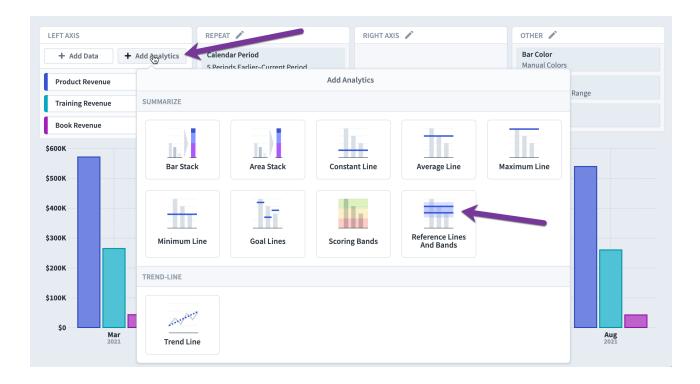


Here we've turned off the display of the line and are showing a red fill above the trend and a green fill below.

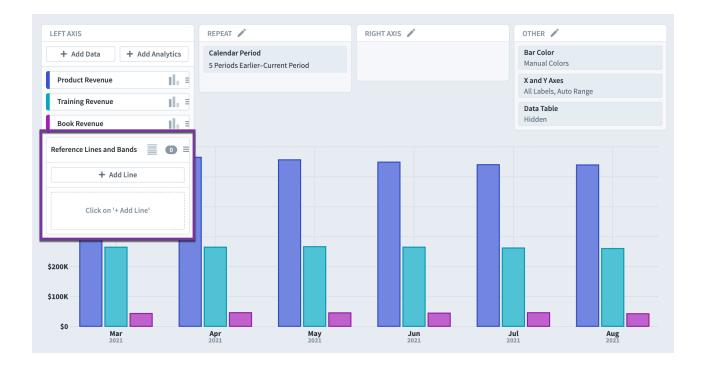


Reference lines and bands

You can add reference lines and bands from the Add Analytics menu for an axis. There are several pre-configured lines and bands to choose from, but in this example we'll choose a blank Reference Lines and Bands item.



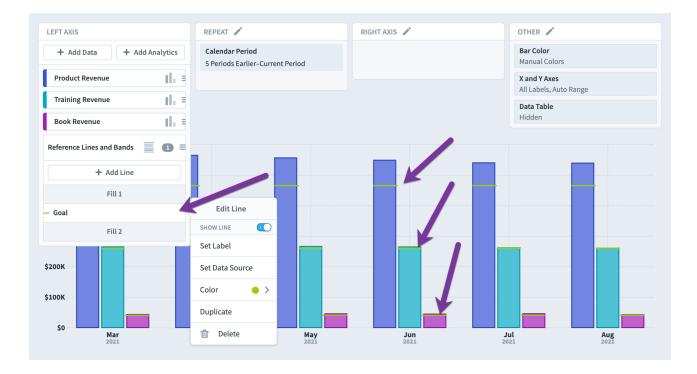
This adds a Reference Lines and Bands item to the axis.



We'll click "Add Line" and then set the data source. First, we'll choose to show each scorecard item's goal.

LEFT AVIC	DEDEXT P	DICUT AND
Set Data Source		
Line Data Source		
Scorecard Item Field		•
Scorecard Item Field		
Goal		~
Cancel		Done
- Line 1		

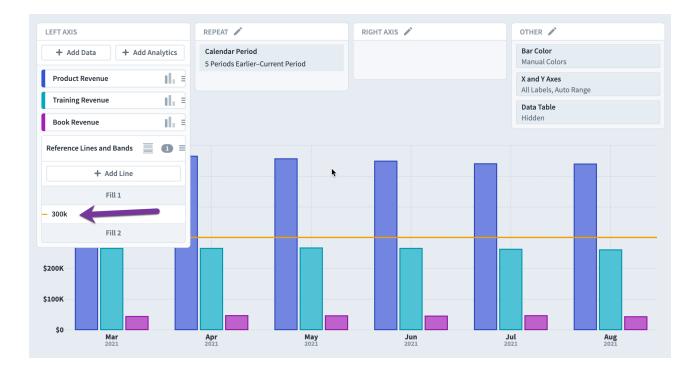
The chart now looks like this. There's a goal line on every bar that we've made green, and we've chosen "Goal" for the line's label.



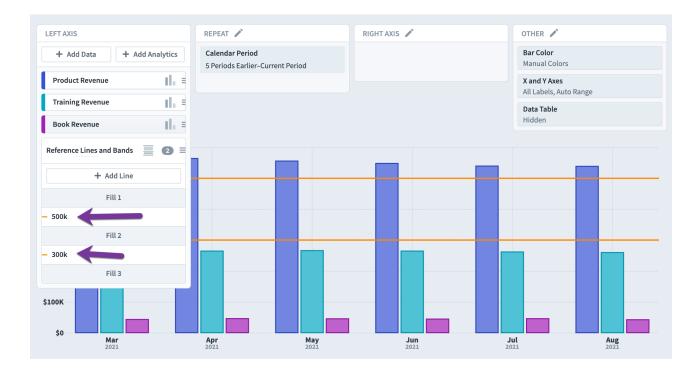
Let's see what a different data source looks like for the line. Here we'll choose a constant number of 300,000.

Set Data Source	and the second sec	and the second sec
Line Data Source		
Constant Number		•
Value		
300000		
Cancel		Done
- Goal		

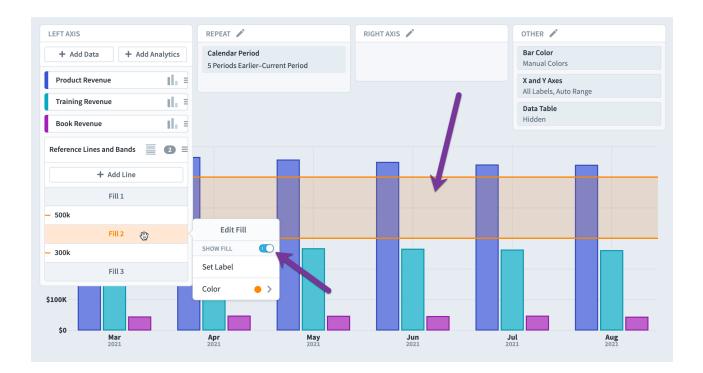
After changing the line color and label, it now looks like this.



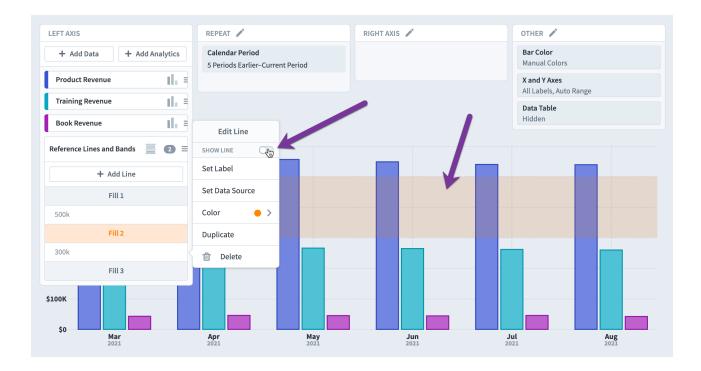
You can add as many lines as you want, each with its own data source. Here we've added a second orange line, this one at 500,000.



There are optional fills above, below, and between lines. Here we're setting the middle fill to orange. A fill between two lines is also called a band.



You can even turn off the display of the lines to just show the fill.



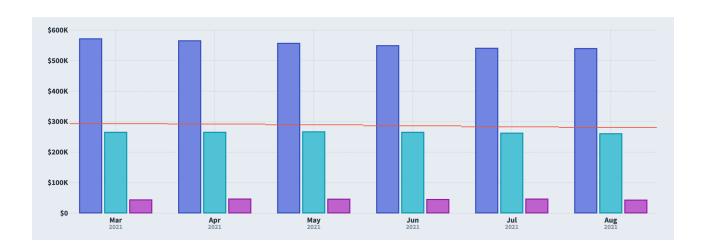
Finally, we'll change the line to show the average of all data series.

Set Data Source	
Line Data Source	
Aggregated Chart Data	
Aggregation Type	
Average	
Choose Data	
All Data 👻	
All Data 🗸	
Product Revenue	
Training Revenue	
Book Revenue	

By default, the scope is the Entire Chart, so you'll see a single line across the entire chart.

LEFT AXIS	REPEAT 🎤	RIGHT AXIS 🧪	OTHER 🎤
+ Add Data + Add Analytics	Calendar Period 5 Periods Earlier–Current Period		Bar Color Manual Colors
Product Revenue			X and Y Axes All Labels, Autochange
Training Revenue			Data Table Hidden
Reference Lines and Bands \equiv 1 \equiv	< Scope		
+ Add Line			
+ Add Fill			
– Line 1	Entire Chart Calendar Period	d Data Series	
+ Add Fill			
\$100K			

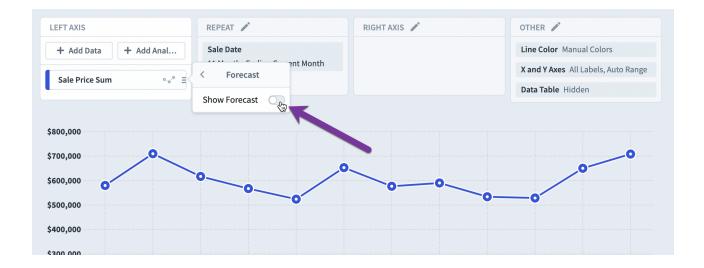
When we change the Scope to "Calendar Period", however, you'll see the chart is now only averaging the series inside of each calendar period, with a separate red



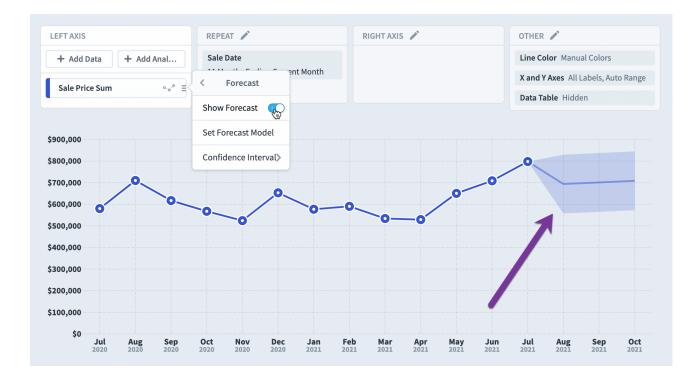
line for each. Notice how the red line jumps slightly from period to period.

Forecasting

Line data series have a "Show Forecast" toggle.



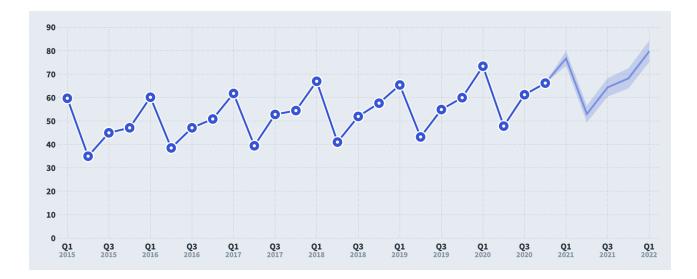
When forecasting is turned on, Spider Impact will show predictions based on historical values. The area around the predicted line is the confidence interval.



By default, the confidence interval is 95%, meaning that based on the data provided, the line has a 95% chance of being in that shaded region in the future. You can change this to 90%, 99%, or turn it off all-together.



Here's an example of Spider Impact detecting a seasonal trend.



Here's a non-seasonal positive trend example.



Here's an example of no trend.



You can tweak the forecast settings by choosing "Set Forecast Model".

LEFT AXIS	REPEAT 🇪	RIGHT AXIS 🇪
+ Add Data + Add Anal	Sale Date	
Sale Price Sum	ent Month	
	Show Forecast	
\$900,000	Set Forecast Model	
\$800,000	Confidence Interval>	
\$700,000		
\$600,000	0_0_0_	-0
500,000	0	~ 0 — 0 [*]
\$400,000		

The default forecast model is Auto, and it's often all you'll need. You can also choose to ignore recent days, which is helpful for data sources where recent data is still in flux.

LEFT AXIS	and the second s		RIGHT AXIS
+ Add I	Set Forecast Model		
Sale Prin	Choose Forecast Model		
	Auto	-	
	Ignore Last Days		
\$900,000			-
\$800,000	Cancel	Save	
\$700,000		0	

When the model is set to Auto, Spider Impact tries out several algorithms and chooses the best fit. If it doesn't detect a trend, it uses Simple Exponential Smoothing. If it detects a trend but no seasonality, it uses Holt's linear trend (also known as Double Exponential Smoothing). If it detects seasonality, it uses the Holt-Winters model (also known as Triple Exponential Smoothing). Both trend and seasonality are additive, as opposed to multiplicative.

If you prefer to choose the algorithms yourself, you can definitely do that. Auto Without Seasonality just means it prevents Spider Impact from detecting seasonality.

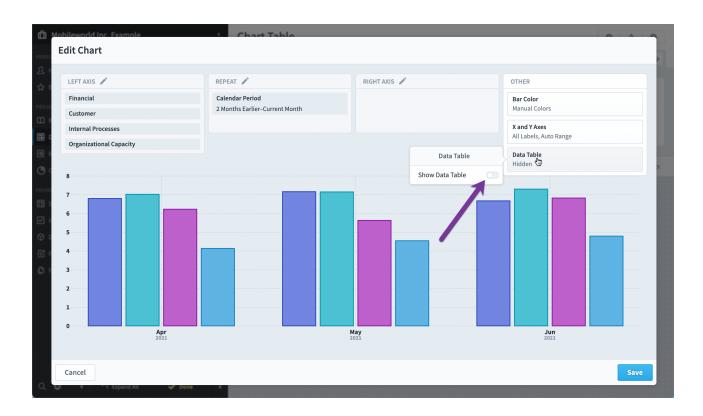
LEFT AXIS		The second se				RIGHT AXIS	1
+ Add I	Set Fore	ecast Model					
Sale Prin	Choose For	recast Model					
	Auto With	out Seasonality			-		
	Ignore Last	t Days					
\$900,000							
\$800,000	Cancel				Save		
\$700,000			_	-			

When you choose a Custom model, you can choose Ignore or Additive for trend and season. If you choose Additive for season, you can also choose if your seasonality is quarterly, yearly, etc.

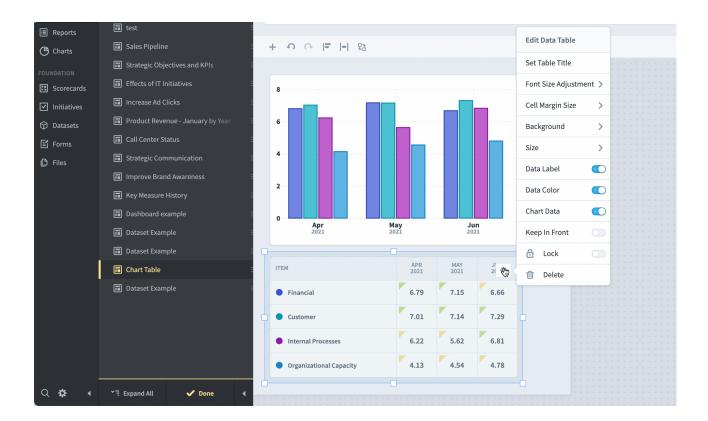
LEFT AXIS	Set Forecast Model		RIGHT AXIS
+ Add D	Choose Forecast Model		
Trips Sum	Custom	-	
	Trend		
	Additive	-	
	Season		
80	Additive	-	
	Season Length		
70	Monthly	-	
	Ignore Last Days		
60			Λ Λ
50	Cancel	Done	
		0 0	

Chart data table

To add a data table to a chart, turn on the "Show Data Table" switch in the chart's Other panel.



On dashboards, the data table is separately configurable with options to adjust the font and margin sizes.



Reports

Overview of Reports

The Basics

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

Creating a report

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

🛍 Mobileworl	ld Inc.	Contract	Sales		C
PERSONAL	Q Find	View			Edit
요 Home 31 숬 Bookmarks	+ New Report	v Folder	CUSTOMER NAME	SALES EMPLOYEE	
PRESENTATION	🔳 New Report	\$351.44	Kendall Nost	Issac Bernhardt	
Briefings	Device Sales	\$351.52	Roberto Feltz	Issac Bernhardt	
Dashboards	🔳 New Report	\$353.50	Lorriane Nevarez	Hollie Pennigton	
Reports	🔳 New Report	\$355.05	Chiquita Carrell	Delphine Calmes	
🕒 Charts	Device Sales 2	\$355.41	Adelaide Henneberry	Micheline Turkasz	
FOUNDATION	New Report Rig Sales 0.5	\$355.81	Evalyn Chancellor	Issac Bernhardt	

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

	Name			ROW FILT	ERS 5
art art	New Report: Ch	noose a Type			d Item Type: is any
les 2 art 0.5	Scorecards	Initiatives	Datasets	SQL SQL	JUNE 2021 KPI VALUE \$856,500
2 :cords :cords, repeat	Cancel	1	2	Next	231,500 \$548,150

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

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

Q Find	
Q Pino	Choose a Scorecard Report
+ New Report	
New Report	SCORECARDS
Device Sale	KPI Comparison Report
New Report	Red KPIs Report
I New Report	S Missing KPI Values Report
Device Sale	3 KPIs by Calendar Report
New Report	Scorecard Structure Report
🔳 Big Sales 0	Annual KPI Data Report
III Big Sales	Scorecard Attributes Report
I Big Sales 2	Scorecard Item Owner/Updater Report
III Hidden rec	Advanced Report Designer
🔳 Hidden rec	
Red KPIs	Cancel Back Cancel Finish

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

🛱 Mobileworl	d Inc.		<	New Report								
PERSONAL	Q Find			View					Edit	July 2021	• <	>
요 Home 31 숪 Bookmarks	+ New Report	D New Folder		In Edit Mode you only see 3	sample Scorecard Items. To	o see all of the S	corecard Items	, switch to the Vi	iew tab			
PRESENTATION	Device Sales											
Briefings	🗉 New Report			Name			ROW FILTER	S Showing 2	260 of 431 Sco	recard Items	+ A	dd
Dashboards	🔲 New Report		Ξ	New Report			Scorecard	Item Type: is an	y of the follo	wing: KPI		
Reports	Device Sales		=									
🕒 Charts	🔳 New Report		E			MAY 2021	JUNE 2021	JULY 2021				
	🔲 New Report			NAME	OWNERS	KPI VALUE	KPI VALUE	KPI VALUE				
Scorecards	Device Sales 2			Total Revenue	I Janet Montgomery	\$866,600	\$856,500	\$846,500				
Initiatives	🔝 New Report		E	SEO Project Spend to Date		231,500	231,500	231,500				
🕅 Datasets	Big Sales 0.5		=	Product Revenue	Nora Roberts	\$555,800	\$548,150	\$539,600				
🕒 Files	Big Sales		=	Floduct Revenue	Scott O'Reilly	\$333,600	\$346,130	\$535,000				
	Big Sales 2		Ξ.	***								
	Hidden records		Ξ									
	🔳 Hidden records, re	peat	Ξ									
	Red KPIs		Ξ									
	⊡ sq∟		Ξ									
ର ଅ ଏ	Y 글 Expand All	✔ Done	•								-	Save

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

rt rt	New Report: Ch	noose a Type			d Item Type: is a
es 2 rt .5	Scorecards	Initiatives	Datasets	SQL SQL	JUNE 2021 KPI VALUE \$856,500
ords	Cancel		D	Next	231,500 \$548,150

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

Name			ROW FI	LTERS	
New Report: C	hoose a Type			d Item Type: is a	
Scorecards	Initiatives	Datasets	SQL SQL	JUNE 2021 RPI VALUE \$856,500	
Cancel		2	Next	231,500	
		Julie o Remy	ITCAL	\$548,150	

The third type of report is Datasets.

Name			ROW FILTERS	Showing All 5 Initiatives	+ Add
New Report			Archive Status: is	s Not Archived	
NAME	ASSIGNED USERS AND GROUPS	PRO JECT	ED BUDGET VARIANCE	PROJECTED SCHEDULE VARIANCE	
Research project and write a report	ASSIGNED USERS AND GROOTS		inder budget	+ On schedule	
Status Update to Board					
Develop a web marketing team	Sam Smith	\$42,500	under budget	19 days early	

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

New Report: Choose a Dataset	
Q Find	Q Find
Mobileworld Inc.	D Mobileworld
Key Performance Indicators	♀ Customers
O Financial	Device Sales
O Marketing	🕅 test
O Customer Support	
O Sales	Sales2 Sa
O Operations	DAMIS
 Information Technology 	◊ DSAID
~∃ Expand All	~∃ Expand All
Cancel Back	⊘—2 Create Report

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

🟛 Mobileworl	d Inc.	<	New Report	
PERSONAL	Q Find		View	Edit
요 Home 31 숬 Bookmarks		🗅 New Folder	In Edit Mode you only see 3 sample Records. To see all of the Records, switch to the View tab	
PRESENTATION	New ReportDevice Sales			+ Add
Dashboards	I New Report		Name Normalize New Report There are no Row Filters	
 Reports Charts 	New ReportNew Report		App Calendar None (Show all time)	
FOUNDATION	Device Sales 2			
Scorecards	New ReportBig Sales 0.5		Add your first column	
Datasets	Big Sales			
🕒 Files	Big Sales 2Hidden records			
	Hidden records, repea	t		
Q ✿ ◀	□ Red KPIs ★ Expand All	Done 🖣		Save

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

e Sales Report	New Report: Ch	noose a Type			RS There are no Ro
Report e Sales 2 Report ales 0.5	Scorecards	Initiatives	Datasets	SQL SQL	
nles nles 2	Cancel	0	2	Next	

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

The View and Edit tabs

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

View					Edit	July 2021	- <
In Edit Mode you only see 3		d Itoms. To soo	all of the Score	card Itoma quitch	a to the View to h		
In Eart Mode you only see 3	sample scorecard	a items. To see	all of the Score	card items, switch			
Name				ROW FILTERS	Showing 290 of 436 Scor	ecard Iten	+ Add
New Report				Scorecard Item	Type: is any of the followin	ng: KPI	
NAME	OWNERS	MAY 2021	JUNE 2021	JULY 2021			
	÷	KPI VALUE	KPI VALUE	KPI VALUE			
Total Revenue		\$697,574	\$697,974	\$701,874			
SEO Project Spend to Date		231,500	231,500	231,500			
Product Revenue	🔍 Full User	\$443,424	\$441,624	\$442,224			

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

View					Edit	July 202	1 -	< >
NAME	OWNERS	MAY 2021	JUNE 2021	JULY 2021				
		KPI VALUE	KPI VALUE	KPI VALUE				
Total Revenue		\$697,574	\$697,974	\$701,874				
SEO Project Spend to Date		231,500	231,500	231,500				
Product Revenue	🔍 Full User	\$443,424	\$441,624	\$442,224				
Training Revenue	🔍 Full User	\$229,900	\$231,050	\$234,050				
Book Revenue	🔍 Full User	\$24,250	\$25,300	\$25,600				
Product Costs		\$275,799	\$275,832	\$275,732				
Training Venue Costs		\$39,590	\$39,181	\$38,606				
Book Production Costs		\$8,339	\$7,905	\$7,797				
Total Costs		\$321.533	\$322.833	\$323,758				

Column Sorting

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

Prebuilt Scorecard Reports

When you choose to create a Scorecard report, the first 8 report options are prebuilt reports to quickly show you relevant data. Most of these "canned" reports are built on top of the Advanced Report Designer and provide you with a great starting point for further customization.

Device Sales	In continuoue you only see a sample accretary nems. To see all of the accret	are nems, switch to the v
New Report	RS Showing 294 of 433	
New Report		rd Item Type: is any of t
Device Sales	SCORECARDS	Scorecard Items: is any
New Report	Scorecard Item Owner/Updater Report	orld Scorecard and des
Device Sales 2	Red KPIs Report	
	S Missing KPI Values Report	121 SEPTEMBER 2021
New Report	3) Annual KPI Data Report	E KPI VALUE
Big Sales 0.5	Scorecard Structure Report	Q ,
Big Sales		
Big Sales 2	🛐 KPIs by Calendar Report	
Hidden records	KPI Comparison Report	<i>¥</i>
Hidden records, repeat	Scorecard Attributes Report	P.
	Advanced Report Designer	
Red KPIs		
SQL	Cancel Back	
KPI Comparison Report		
Scorecard Item Owner/Upd	ater Report	

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.

😤 Red Measures Report		
Select Scorecard Item		
Show descendants of linked items		
Q Find	Q Find	
Mobileworld Inc.	Financial Profit and Loss	
Key Measures	> 🖸 Revenue	
 Financial 	> 🖸 Cost of Sale	
Marketing	> 🖸 Gross Profit	
Customer Support	> Operating Expenses	
Sales	> Net Operating Profit	
Operations		
Information Technology		
Human Resources		
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 pecific Users Or Gro			
	pecific Users Of GIU	ups		
CHOOS	E THE DATA TO VIEW			
Resp	onsibility Type			
Ow	ners or Updaters			-
	nclude Measures On	ly		

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	

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.

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	*∃ Expand All	
Cancel Back		Next

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

Red KPIs Report SELECT THE CALENDAR PERIODS TO DISPLAY CALENDAR Current Calendar SHOW Current Period TO CHOOSE THE DATA TO VIEW Id Id Name Owners Description Updaters	Objective
SELECT THE CALENDAR PERIODS TO DISPLAY CALENDAR Current Calendar SHOW Current Period TO CHOOSE THE DATA TO VIEW Id V Id V KPI Value Name Owners Description Updaters	
CALENDAR Current Calendar SHOW Current Period TO Current Period CHOOSE THE DATA TO VIEW Id Name Name Description Updaters	
SHOW Current Period CHOOSE THE DATA TO VIEW Id Vame Owners Description Updaters	
CHOOSE THE DATA TO VIEW Id ✓ KPI Value Name ✓ Owners Description Updaters	
CHOOSE THE DATA TO VIEW Id ✓ KPI Value Name ✓ Owners Description Updaters	
Id ✓ KPI Value ✓ Name ✓ Owners ✓ Description Updaters	
Name Owners Description Updaters	
✓ Description Updaters	
Organization	
Show Abbreviated Values	
Cancel Back 🗸 🗸 Cancel Fini	

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

🛱 Mobilewor 🗸	Red KPIs Report			
PERSONAL	View		Edit	September 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
 ✓ Initiatives ♦ 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.

Select Scorecard Item										
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	רק Expand All									
Cancel Back	✓ 2 3									
	O'Reilly									

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

🗳 кріс	Comparison Repo	ort		NAME	DESCRIPTION	OWNERS	
🖨 R	Missing KF	PI Values Repo	ort			ale	
🖨 bi						terson	
🖨 De	SELECT THE	CALENDAR PERIODS	ro disp	LAY		Reilly	
🖨 Up	CALENDAR	Current Calendar	•				
📽 Ad	SHOW	Current Period 💌	то	Current Period 🔻		onzález tott	
В						Reilly	
📽 Sc	CHOOSE THE DATA TO VIEW						
	🗌 Id			🗸 KPI Value		Reilly	
	Name			✓ Owners			
	Description			✓ Updaters		ott Reilly	
	Organiz	ation				Isan	
	Show Abb	reviated Values				urphy	
	Cancel	Back		0-0-3	Finis	h nzález tott Reilly	
	Cancel	Back		0-0-0	Finis	h	

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

🛱 Mobilewor 🗸	Missing KPI Value					
	View		Ed	it September 202		
요 Home 63 숬 Bookmarks	NAME	DESCRIPTION	OWNERS	UPDATERS	SEPTEMBER 2020	
PRESENTATION Dashboards	Test KPI					
🕒 Charts & Reports	КРІ			SMS Administrator		
Briefings	Base Funding					
FOUNDATION E Scorecards	MIPRs	Here's a description for training revenue				
 Initiatives Datasets 	UFRs					
🕒 Files	Production Costs					

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.

a Dashboards	Inc. Scott O'Reilly	9000m
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		
* 🗄 Expand All	Ϋ́∃ Expand All	
Cancel Back	⊘ (3)	Next
Inter	est & Bank Charges Financial Scott O'Reilly	\$22.2K

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

parison Report	Total Revenue	Mobileworld	Dale Peterson
Annual KPI D	ata Report		etty
ort Write			ále
SELECT TIME RA	NGE TO DISPLAY		illy
SHOW ALL OF	2020 -		illy
BROKEN DOWN B	Y Monthly -		illy
rtment			ph
CHOOSE THE DA	TA TO VIEW		ále
DID		🗸 Actual Value	illy
Assigned C	alendar	Score	
Owner(s)		Goal	illy
Updaters(s)	Variance To Goal	
Parents		% Variance To Goal	illy
Sub-KPIs		% Toward Goal	
Initiatives		Tags	sor
Score Influ	ence	Yearly Totals	illy
Show Abbr	eviated Values		
			es illy
Cancel	Back	⊘ — ⊘ — 3	Finish
			June and Illy

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
ディ Bookmarks	КРІ	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 Dashboards	Base Funding	469K	465K	470K	465K	469K	464K	7	472K	464K	466K	463K	45
Charts & Reports	MIPRs	\$1,250	\$4,850	\$6,650	\$10.1K	MAY 2020 468,500	\$14.7K	\$16K	\$19.7K	\$22.9K	\$25.8K	\$29.2K	\$32
🛱 Briefings	UFRs	\$43.8K	\$45.3K	\$43.2K	\$44.2K	341.0K	\$45.9K	\$45.6K	\$42.1K	\$42.9K	\$40.9K	\$43.7K	\$46
FOUNDATION	Revenue	\$514K	\$515K	\$520K	\$520K	\$528K	\$524K	\$61.5K	\$533K	\$530K	\$532K	\$536K	\$5:
✓ Initiatives	Net 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.

a -	🕞 KPI Comparison Report	Funding	1011 1011 1011	
3 0	Select Scorecard Item			\$19
1) e	Show descendants of linked items			\$42
OUN				\$53
:: s	Q Find		Q Find	
2	Mobileworld Inc.		Bobileworld Balanced Scorecard	\$90
9 c	Key Measures		> 🔺 Financial	
D F	Financial		> 🔺 Customer	10.
	Marketing		> 🔺 Internal Processes	
	Customer Support		Organizational Capacity	\$58
	Sales	•	 Archived after May 2020 	91.
	• Operations			
	Information Technology			3.3
	°∃ Expand All		~∃ Expand All	
	Cancel Back		⊘—2 —3	Next 23
				-

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

rd Trending Me	asures	Revenue	\$514K	\$515K	\$520K	\$520K	
rending Meas	Scorecard	Structure R	leport			7.3K	
tment	CHOOSE THE	DATA TO VIEW					
d Structure Re	Descrip	tion	Updat	ers		1.6%	
	KPI Three Owners		Weigh	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.

🛱 Mobilewor Y	Scorecard Structure	Report			₽ ▼
PERSONAL	View			Edit	September 2020 👻 < >
요 Home <u>63</u>					
会 Bookmarks	Scorecard Mobileworld Balanced Scorecard	Key Performance Area Financial	Objective Increase Revenue		Linked Item Base Funding
Dashboards					Linked Item
Charts & Reports					MIPRs
III Briefings					Linked Item
FOUNDATION					UFRs
Scorecards					KPI
Initiatives					Total Revenue
🗘 Datasets			Objective		Linked Item
🕒 Files			Improve Profitability		Net Operating Profit (before tax)
					Linked Item % Net Operating Profit
			Objective Reduce Sales Overhead Co	ost	Linked Item Sales & General Admin
		Key Performance Area Customer	Objective Improve Customer Satisfa	ction	Linked Item Customer Satisfaction Survey
			Objective		Linked Here

KPIs by Calendar Report

The KPIs by calendar report 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	* 4 5- 0
PERSO	Select Scorecard Item		
요 ⊨ ☆ ⊫	Show descendants of linked items		
PRESE	Q Find	Q Find	
	Mobileworld Inc.	Mobileworld Balanced Scorecard	
00	Key Measures	Financial	
Ш I	Financial	Customer	
FOUN	Marketing	▲ Internal Processes	
	Customer Support	Organizational Capacity	
	Sales	 Archived after May 2020 	
D F	Operations		
	Information Technology		
	* च Expand All	र च Expand All	
	Cancel Back	⊘—2 —3	Next
	🔅 4 "T Expand All 🦯 Edit 4		Mass Edit

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

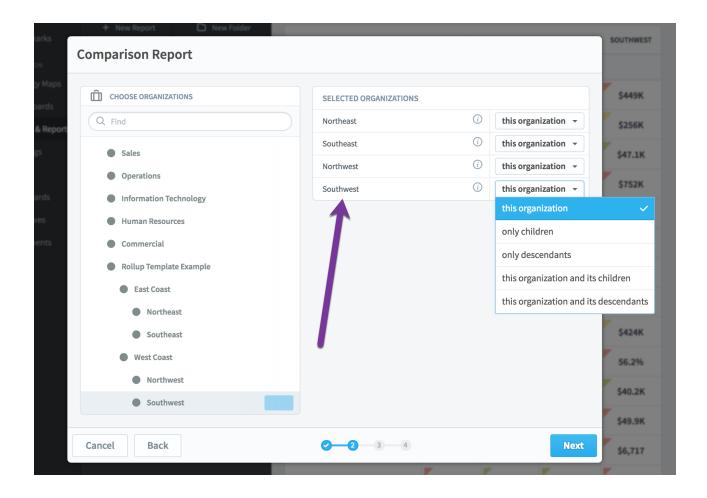
+	New Report	D New Folder	
¢	Red KPIs	KPI Update Frequency Report	
¢	Missing KPI V		
¢	KPI Comparie	SELECT THE KPI UPDATE FREQUENCIES YOU WOULD LIKE TO DISPLAY	D
¢	Report Write	Monthly Yearly	
e	big Report V	Quarterly Weekly	
¢	Dow Lard T		
1	Upward Tren	CHOOSE THE DATA TO VIEW	
¢	Ad Clicks Cha	✓ Id ✓ Name	
	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.

🛱 Mobileworld In	ic. ~	KPI Update Frequenc	y Rep	ort			
	Q Find	View		E	dit Septem	ber 2020 🔻	< >
요 Home 63 C Bookmarks	+ New Report 🗋 New Folder	NAME	ID	KPI FREQUENCY			
PRESENTATION	🗳 Red KPIs	Total Revenue	1096	Monthly			
Dashboards	Missing KPI Values Report	SEO Project Spend to Date	1099	Monthly			
Charts & Reports	 KPI Update Frequency Report KPI Comparison Report 	Base Funding	935	Monthly			
Briefings FOUNDATION	Report Writer multiple ancestors	MIPRs	936	Monthly			
Scorecards	🗳 big Report Writer	UFRs	937	Monthly			
Initiatives	Downward Trending Measures	Production Costs	940	Monthly			
Datasets	Upward Trending Measures Ad Clicks Chart	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.

Ô	Mobileworld Inc. ~	KPI Update Frequency Report	D-*
PERSO	Select Scorecard Item		
요 F ☆ F	Show descendants of linked items		
PRESI	Q Find	Q Find	
	Mobileworld Inc.	Bobileworld Balanced Scorecard	
00	Key Measures	Financial	
Ш I	Financial	Customer	
FOUNI	Marketing	Internal Processes	
	Customer Support	Organizational Capacity	
9	Sales	 Archived after May 2020 	
0	Operations		
	Information Technology		
	Ϋ́∃ Expand All	र च Expand All	
	Cancel Back	⊘—0	Finish
	🗱 4 * 🗄 Expand All 🎤 Edit 4	You haven't saved this report yet	Mass Edit Save

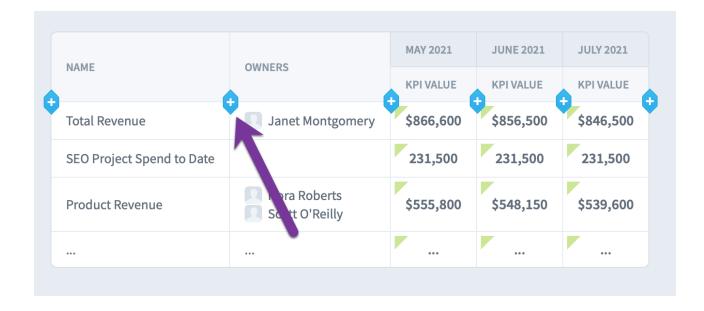
When we click Finish, we see a report that looks like this:

🛱 Mobileworld Ind	z. ×	Scorecard Attribute	s Report					
	Q Find	View					Edit	September 2020 👻 < >
요 Home 63 ☆ Bookmarks	+ New Report D New Folder	NAME	DATA TYPE	AGGREGATION	SCORING TYPE	KPI FREQUENCY	OWNERS	UPDATERS
PRESENTATION Dashboards	🐣 Red KPIs	Mobileworld Balanced Scorecard						
Charts & Reports	 Scorecard Attributes Report KPI Comparison Report 	Financial						
Briefings FOUNDATION	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)
🖒 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 Scott O'Reilly

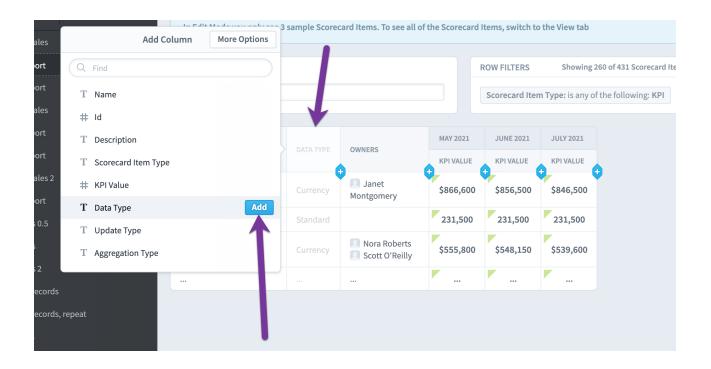
Building Reports

Adding and reordering columns

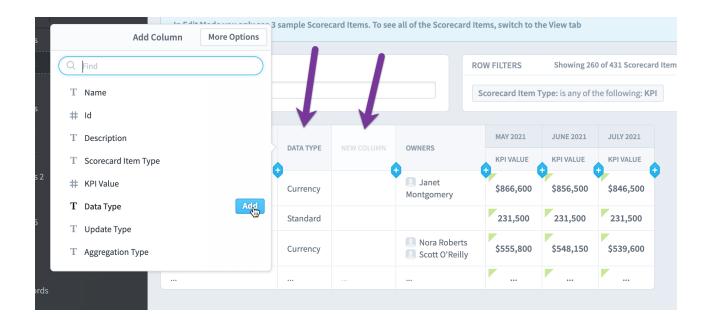
To add a new column, click the "Add" button where you want the new column to go.



This brings up a list of all available fields from which to create columns. Here you can see the placeholder where the new column will go, right before we click to add the "Data Type" field as a column.



Immediately after the new column is added, the "Add Column" tooltip stays open, and you can see a new placeholder column to the right of the new column. This allows you to add multiple columns quickly with a few clicks.



To change the order of columns, you can just drag and drop them to where you want them to be.

\$468.22 SALES EMPLOY \$63 m6 Hollie Pennig Attack \$477.13 Hollie Pennig Attack
\$63<0Hollie Pennig\$437.13Hollie PennigThe relation of the relation of
Hollie Pennig \$437.13 Hollie Pennig on Retail
Hollie Pennig on Retail
Issac Bernhardt Retail

Row filters

Most reports will contain at least one row filter. The idea here is that you're choosing which scorecard items/initiative items/dataset records you want to show. In this example we've created a new scorecard item report, and there's already a filter to only show KPIs. Let's add a new filter by clicking the "add" button.

Name			ROW FILTER	S Showing 260 of 431	Scorecard Items	+ A
New Report			Scorecard	I Item Type: is any of the f	ollowing: KPI	1
IAME	OWNERS	MAY 2021	JUNE 2021	JULY 2021		
IAME	OWNERS	KPI VALUE	KPI VALUE	KPI VALUE		
Fotal Revenue	Janet Montgomery	\$866,600	\$856,500	\$846,500		
SEO Project Spend to Date		231,500	231,500	231,500		
Product Revenue	Nora Roberts	\$555,800	\$548,150	\$539,600		

The default row filter is "Specific Scorecard Items" and we'll use that here.

ct Databa	Mass Edi	t Scorecard Items: Add Row Filter	_
agement	Mass Lui	Scorecard Rems. Add Now Filter	
		omething that you want to filter on. This will limit your report to only ows for scorecard items that match your filter.	
Activity	Filter On		
5	Specific Sco	precard Items	•
Process			
	Cancel	2	Next
orecard It	ems		

This allows you to manually choose which scorecard items you want to see. We'll add the entire "Mobileworld Balanced Scorecard" and click Done.

PERSONAL	Import Connections		1.00
۶.	- ilter: Specific Scorecard Items		
☆ E			
PRESE	ID NAME	ORGANIZATION	=
CC) 8	915 Mobileworld Balanced Scorecard	Mobileworld Inc. Example) 💼 🔽
2 0 s	Show descendants of linked items		
III F	SCORECARD ITEM		
C	Q Find	Q Find	
FOUNE	O SPIDER IMPACT	Mobileworld Balanced Scorecard	- Canal Canad Canal Canad Canal Canad Canal Canad Canal Canad Cana
∷ s	O YOUR TRIAL ENVIRONMENT	> 🔺 Financial	6
I	Mobileworld Inc. Example	> 🔺 Customer	
() ()	Key Measures	> 🔺 Internal Processes	
D F	Financial	> 🔺 Organizational Capacity	
	Marketing	Test KPI	
	Customer Support		
	Sales		
	°∃ Expand All	*∃ Expand All	
	Cancel Back	0—0	Done
Q 🔅	· · · ·		Edit Selected Items

Now we only see the two of the KPIs in the Mobileworld Balanced Scorecard.

Name		R	ROW FILTERS Sh	owing 2 of 431 Score	card Items 🕂 Ad
New Report			Scorecard Item T	ype: is any of the fol	lowing: KPI
				rd Items: is any of th recard and descend	0
	01111575	JULY 2021	AUGUST 2021	SEPTEMBER 2021	
NAME	OWNERS	KPI VALUE	KPI VALUE	KPI VALUE	
Total Revenue	Janet Montgomery	\$847K	\$840K	\$830K	ľ l
SEO Project Spend to Date		232K	232K	232K	

To edit a filter, just click on it. This opens the same dialog we saw before, and this time we'll choose to make this an OR filter.

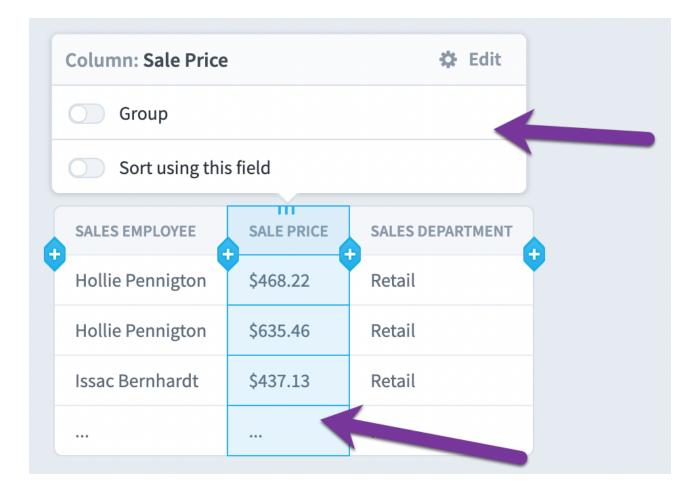
5	how descendants of linked items		
sco	DRECARD ITEM		
0	Find	Q Find	
•	Mobileworld Inc.	Mobileworld Scorecard	Add
	Key Performance Indicators	Financial	
	Financial	Customer	
	Marketing	Internal Processes	
	Customer Support	Organizational Capacity	
	Sales		
	• Operations		
	Information Technole		
	~∃ Expand All	Υ ∃ Expand All	
	Add To Existing Filter As An OR		
СН	OOSE A FILTER		
	corecard Item Type: is any of the following: KPI		

Now we see all scorecard items that are either KPIs or in the Mobileworld balanced scorecard.

🛱 Mobileworld	Inc.	<	New Report						
	Q Find		View				Edit	September 2021 👻	< >
요 Home 39 ☆ Bookmarks	+ New Report 🗅	New Folder	In Edit Mode you only s	ee 3 sample Scorecard Item	ns. To see all of t	he Scorecard Iter	ns, switch to	the View tab	
PRESENTATION	Device Sales								
1) Briefings	🔳 New Report		Name			ROW FILTERS	Showing 294	of 431 Scorecard Items	+ Add
Strategy Maps	🔳 New Report		New Report			Scorecard Ite	m Type: is ar	y of the following: KPI	
Dashboards	🔳 New Report					OR Specific Score	ecard Items:	is any of the following:	
Reports	Device Sales					Mobileworld	Scorecard ar	d descendants	
Charts	🔳 New Report		•						
	Device Sales 2		NAME	OWNERS	JULY 2021	AUGUST 2021	SEPTEMBE		
Scorecards	🗉 New Report			0	+ KPI VALUE	KPI VALUE	KPI VAL		
Initiatives	Big Sales 0.5		Mobileworld Scorecard	Brandon Sampson					
🗘 Datasets	Big Sales			Nora Roberts					
f Forms	Big Sales 2		Financial						
🗅 Files	Hidden records		Increase Revenue			F			
	🔳 Hidden records, repeat						·		
	🔳 Red KPIs								
	🗅 sql								
	KPI Comparison Report								
	Scorecard Item Owner/U	pdater Report							
	Downward Trending KPIs	5							
Q 🗱 📢	४ ऱ Expand All 🛛 🗸 ।	Done 4							Save

Setting column labels

To edit a column, just click on it. You'll see the column that you're going to edit highlighted, and it shows a tooltip with your editing options.



In this example we'll click the Edit button, and we'll choose "Set Column Label."

Column: Sale Price	1	🗱 Edit	Edit Column
Group			Set Column Label 🧲
Sort using this	s field		Set Data Source
SALES EMPLOYEE	SALE PRICE	SALES DEPARTMENT	Edit Formatting
Hollie Pennigton	\$468.22	Retail	🛅 Delete
Hollie Pennigton	\$635.46	Retail	
Issac Bernhardt	\$437.13	Retail	

This opens a dialog where you can choose to override the Default column label and type a value of your own. In this example we're going to change the "Sale Price" label to "Value."

	Set Column Label	olumn
	COLUMN LABEL Default Custom	Label
	Column Label	urce
u i	Value	ting
	Cancel Save	

Here's what the report looks like with the new column label.

SALES EMPLOYEE	VALUE	SALES DEPARTMENT
Hollie Pennigton	\$468.22	Reta.
Hollie Pennigton	\$635.46	Retail
Issac Bernhardt	\$437.13	Retail

Editing column data

Every report column gets its data from somewhere, and to edit what data is showing, choose "Set Data Source" from the Edit Column menu.

uizas	Edit Column: Set Data Source	
		umn
	Type Basic Calculated	_abel
	Field	rce
ry by Year 🛛	Sale Price	- ing
	Cancel	Done

The default column type is Basic. This means the column is showing the value for a single field.

Column: Sale Price	•	🗱 Edit	Edit Column
Group		<u>v</u>	Set Column Label
Sort using this	s field		Set Data Source
SALES EMPLOYEE	SALE PRICE	SALES DEPARTMENT	Edit Formatting
Hollie Pennigton	\$468.22	Retail	💼 Delete
Hollie Pennigton	\$635.46	Retail	
Issac Bernhardt	\$437.13	Retail	

You can also choose to show a Calculated value in a column. Here we'll change the Type to Calculated and we'll click the "Set Equation" button.

	Edit Column: Set Data Source		
ng Measures 🛛 🗄 Measures 🔤	Type Basic Calculated		umn _abel
re i	Data Type	•	rce
- January by	Equation Set Equation	<i>I</i> *	ing
	Cancel	Done	

In this example we're building an equation that shows the value of the "Sales Price" field, but with an additional 7% sales tax added if the value of the Country field is "United States." For more information, see the <u>Equations</u> article.

quation			allowed input: + -
lf([Customers].[Country]	== "United States", [Device Sa	les].[Sale Price] * 1.07, [Device S	iales].[Sale Price])
CHOOSE SOURCE FIELD			
Dataset	Field	Aggregation Type	
Device Sales	▼ Sale Price	• + Sum	✓ Add
ROW FILTERS			+ Add Row Filte
	There are r	no Row Filters	
	There are r	no Row Filters	

Finally, it's important to note that you can reach this "Set Data Source" menu when adding a new column. Most of the time you'll want to choose a field from the list when adding a column. But, if you know your new column is going to be more complicated than that, you can just click the "More Options button that's in the "Add Column" tooltip.

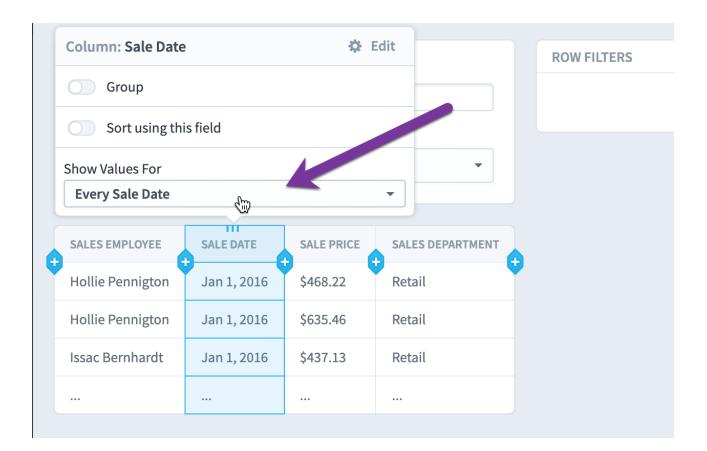
Red M	Add Column	More Options				
Down	Q Find					
Upwai						
Ad Clio	😪 Customer ID		l time)		•	
Score	🛐 Sale Date					
Produ	🖾 Sale Price		NEW COLUMN	SALE PRICE	SALES DEPARTMENT	
By Dep	T Sales Department		(\$468.22	Retail	Ð
	T Sales Employee			\$635.46	Retail	
				\$437.13	Retail	
				3431.IS	Retait	

This shows the same "Set Data Source" menu, but this time it's for a column that hasn't been created yet.

Red M	Add Column	Mite Options	ROW FILTERS
Downi			There
Ad Clie	🚱 Customer ID	Add Column	
Scored	31 Sale Date		
Produ	🖸 Sale Price	Туре	
3 By Dep	T Sales Department	Basic Calculated	
	T Sales Employee	Field	
		Choose a field 👻	
		Cancel	

Show values for

Sometimes when you click on a column, you'll have a "Show Values For" dropdown. In this example we've clicked on a date column that's showing data from the Sale Date field, and we're currently showing "Every Sale Date".



Here we've chosen to show values for the Quarterly calendar. The column now shows which quarter the sale happened in instead of the specific date.

Column: Sale Da	ate	🔅 Ec	lit	ROW FILTERS
Group				There
A Sort using	this field			
Show Values For			-	
Quarterly			•	
SALES EMPLOYEE	SALE DATE	SALE PRICE	SALES DEPARTMI	
Edmond Zehrbach	Quarter 1, 2021	\$522.30	Retail	
Issac Bernhardt	Quarter 1, 2021	\$621.02	Retail	
Odell Sheler	Quarter 1, 2021	\$444.41	Retail	
		•••		

You'll see other options in the "Show Values For" dropdown depending on what data your column is showing. For example, our dataset has four ranges set up for the Sale Price field.

		Key Colu	imn (
Add Ranges: Sale Price		nary Key	
RANGES	+ Add		D
Small Sale less than \$400	1 🗇		
Medium Sale \$400 or more, less than \$700	1		
Large Sale \$700 or more, less than \$2,000	1 🗇		
Very Large Sale \$2,000 or more	✓ ⑪	EDIT	н
Cancel	Done		

When we click on the column showing the Sale Price field, we can see that it defaults to "Every Sale Price".

Name	Column: Sale Price		*	Edit	ROW FILTERS	
Device Sales	Group					There are
App Calendar	Sort using this	s field				
None (Show al	ihow Values For Every Sale Price	` ₩⁄		• •		
SALES EMPLOYEE	Every Sale Price R	ange	- Netwin		¢	
Issac Bernhardt	January 2021	\$621.02	Retail			
Odell Sheler	January 2021	\$344.41	Retail			
		•••				

If we change "Show Values For" to "Every Sale Price Range", we'll see values that look like this.

SALES EMPLOYEE	SALE MONTH	SALE PRICE	SALES DEPARTMENT
Edmond Zehrbach	January 2021	Medium Sale	Retail
Issac Bernhardt	January 2021	Medium Sale	Petail
Odell Sheler	January 2021	Small Sale	Retail

Column formatting

To edit a column's formatting, choose "Edit Formatting" from the Edit tooltip.

Column: Sale Price	2	🗱 Edit	Edit Column
Group			Set Column Label
Sort using thi	s field		Set Data Source
SALES EMPLOYEE	SALE PRICE	SALES DEPARTMENT	Edit Formatting
Hollie Pennigton	\$468.22	Retail	💼 Delete
Hollie Pennigton	\$635.46	Retail	
Issac Bernhardt	\$437.13	Retail	

The Edit Formatting dialog gives you a preview of what your formatted data will look like. Here we've changed the font size to large, changed the color to dark, abbreviated the data, and aligned everything right.

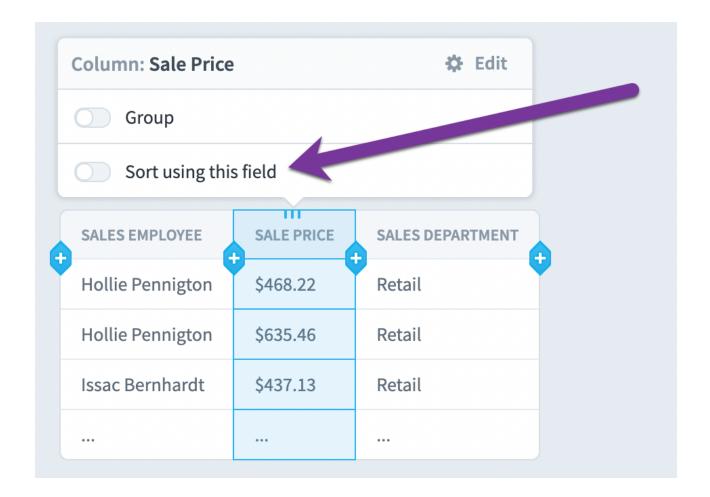
		Sot Data Source
Formatting: Edit For	rmatting	
1 Abbreviate		
Default Decimal Precision		•
Large - B / U	= =	
Dark Color		•
SALE PRICE		
		\$468
		\$635
		\$437
		\$514
Cancel		Save

We end up with a report that looks like this.

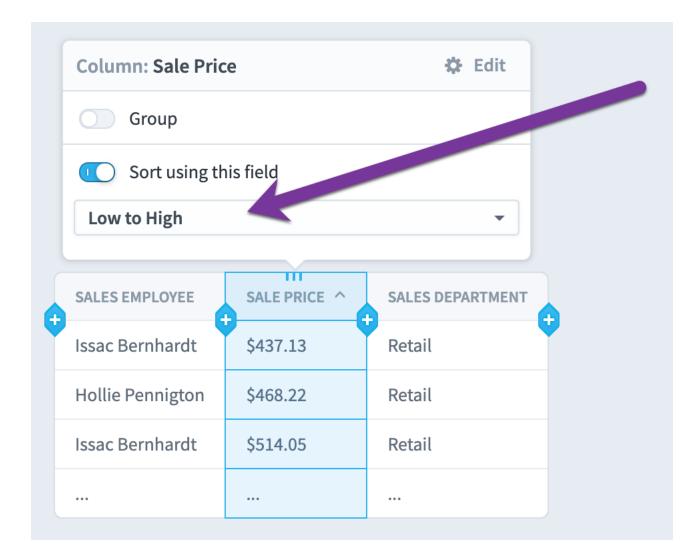
SALES EMPLOYEE	SALE PRICE	SALES DEPARTMENT
Hollie Pennigton	\$468	Netail
Hollie Pennigton	\$635	Retail
Issac Bernhardt	\$437	Retail

Column sorting

You can choose to sort on any field in your report. The default sorting for scorecard and initiative reports is first by organization, and then by tree order. You can change this default sorting by clicking on a column and turning on "Sort using this field."



You can then choose to sort that column ascending or descending.



Grouping

You can group by a column by clicking on the column and turning on the Group switch.

Column: Sales	Employee	🌣 Edit		
Group				
Sort using	g this field			
Show Values For				
Every Sales En	nployee	-		
	SALES EMPLOYEE	SALE MONTH	SALE PRICE	SALES DEPARTMENT
	Edmond Zehrbach	January 2021	\$522.30	Retail
	Issac Bernhardt	January 2021	\$621.02	Retail
	Odell Sheler	January 2021	\$444.41	Retail

This shows all unique values for that column as large group headers, and then lists all of the records with that value underneath. In this example we've grouped by the Sales Employee column, so each group is a different sales employee. The Edit tab only shows the first three groups, but switching to the View tab will show the full report.

	SALE MONTH	SALE PRICE	SALES DEPARTMENT
	July 2021	\$746.76	Retail
	July 2021	\$390.12	Retail
	July 2021	\$608.76	Retail
Sales	Employee: Edmond	Zehrbach	
	SALE MONTH	SALE PRICE	SALES DEPARTMENT
	July 2021	\$708.99	Retail
	July 2021	\$566.96	Retail
	July 2021	\$716.73	Retail
Sales	Employee: Hollie Pe	ennigton	
	SALE MONTH	SALE PRICE	SALES DEPARTMENT
	February 2020	\$725.93	Retail
	February 2020	\$596.53	Retail
	February 2020	\$648.47	Retail
•••			
	SALE MONTH	SALE PRICE	SALES DEPARTMENT
			•••

You can create another level of grouping by selecting another column and turning on "Group Again".

	Column: Sales	Department	🌣 Edit
	Group Aga	ain	
	Sort using	this field	
	Show Values For		
Sales Employee: Del	Every Sales De	partment	•
SALE MONTH	SALE PRICE	SALES DEPARTMENT	
July 2021	\$746.76	Retail	
July 2021	\$390.12	Retail	
July 2021	\$608.76	Retail	
Sales Employee: Edn	nond Zehrbach		
SALE MONTH	SALE PRICE	SALES DEPARTMENT	
July 2021	\$708.99	Retail	
Julv 2021	\$566.96	Retail	

In this example the Sales Employees are also grouped by Sales Department.

Sales Departn	ent: Corporate	
Sales I	Employee: Kym Lave	nder
	SALE MONTH	SALE PRICE
	July 2020	\$16,308.81
	July 2020	\$785.54
	August 2020	\$6,497.68
Sales	Employee: Russell C	orrick
	SALE MONTH	SALE PRICE
	August 2018	\$2,070.60
	October 2018	\$31,485.14
	August 2018	\$25,334.06
Sales Departn	nent: Retail	
Sales I	Employee: Delphine	Calmes
	SALE MONTH	SALE PRICE
	July 2021	\$608.76
	Julv 2021	\$591.86

Hiding individual records

Adding a group to your report opens the door to many new data presentation possibilities. The most powerful is the ability to turn off "Show Individual Records". In this example, we're grouping records by the Sales Employee column, and we're showing columns for the Sale Date, Sale Price, and Sales Department.

Group	Show	Individual Records	(
Show Groups For				
Every Sales Employ	yee	•		
Sort This Group				
		•		
A to Z				
A to Z				
A to Z les Employee: Delph	ine Calmes			
les Employee: Delph	SALE PRICE	SALES DEPARTMENT		
les Employee: Delph	SALE PRICE	SALES DEPARTMENT Retail	•	
les Employee: Delph SALE DATE	SALE PRICE		•	
les Employee: Delph SALE DATE July 2021	SALE PRICE \$746.76	Retail	•	

When you turn off "Show Individual Records", the report now only shows the groups. As you can see, the columns remain the same, but now they're showing aggregated data for each group. Number columns like Sale Price are summed by default. The default aggregation type of Date and Text columns is counting the number of unique values.

Column: Sales	Employee	🗱 Edit		
Group	Show Indi	vidual Records		
Sort This Group)			
A to Z		•		
	SALES EMPLOYEE	# UNIQUE: SALE DATE	SALE PRICE SUM	# UNIQUE: SALES DEPARTMENT
	Edmond Zehrbach	1,666	\$2,305,532.83	1
	Delphine Calmes	1,687	\$2,598,137.46	1
	Hollie Pennigton	1,795	\$3,076,958.48	1

Let's say we want to show the Average sale price for a group instead of the Sum of all sale prices. To do this, just choose Set Data Source like we did before.

	Column: Sale Pri	ce	🗱 Edit	Edit Column
	Group Aga	Group Again		
	Sort Using	Sort Using This Field		
	Re	Repeat this column by		
				💼 Delete
SALES EMPLOYEE	# UNIQUE: SALE DATE	SALE PRICE SUM	# UNIQUE: SALES DE	
Edmond Zehrbach	1,666	\$2,305,532.83	1	
Delphine Calmes	1,687	\$2,598,137.46	1	
Hollie Pennigton	1,795	\$3,076,958.48	1	
			•••	

Now that we're showing aggregated data, however, we have an Aggregation Type choice in this dialog. We'll choose Average.

	Edit Column: Set Data Source		
iry by Year	Туре		Edit Column
	Basic Calculated		Set Column Label
	Field Sale Price	•	Set Data Source
	Aggregation Type		Edit Formatting
	-∽ Average	•	Delete
	+ Sum		
Delphin	 ✓ Average ✓ Minimum 		PARTMENT
Edmone	- Maximum		
Hollie Pr	₩ Number of Unique	le	

Once we click Done, we have a report showing the average sale price for each employee.

SALES EMPLOYEE	# UNIQUE: SALE DATE	AVERAGE SALE PRICE	# UNIQUE: SALES DEPARTMENT
Edmond Zehrbach	1,666	\$614.81	1
Delphine Calmes	1,687	\$614.51	1
Hollie Pennigton	1,795	\$622.49	1

Finally, we'll change the Sale Date aggregation type to "Latest Date". Our finished report looks like this on the Edit Tab.

SALES EMPLOYEE	# UNIQUE: SALE DATE	AVERAGE SALE PRICE	# UNIQUE: SALES DEPARTMENT
Edmond Zehrbach	1,666	\$614.81	1
Delphine Calmes	1,687	\$614.51	1
Hollie Pennigton	1,795	\$622.49	1
•••			

And like this on the View tab.

View			
SALES EMPLOYEE	LATEST SALE DATE	AVERAGE SALE PRICE	# UNIQUE: SALES DEPARTMENT
Delphine Calmes	Jul 31, 2021	\$614.51	1
Edmond Zehrbach	Jul 31, 2021	\$614.81	1
Hollie Pennigton	Jul 31, 2021	\$622.49	1
Issac Bernhardt	Jul 31, 2021	\$616.34	1
Kym Lavender	Jul 28, 2021	\$17,721.23	1
Micheline Turkasz	Jul 31, 2021	\$617.45	1
Odell Sheler	Jul 31, 2021	\$617.82	1
Russell Corrick	Jul 29, 2021	\$17,977.49	1

Column filters when hiding individual records

Once you're hiding individual records and your report is showing aggregated data, you can start adding filters to your columns. In this example we're going to choose "Set Data Source" for a Sale Price column.

	Column: Sale Pri	ce	🔅 Edit	Edit Column
	Group Aga	in	<u>\</u>	Set Column Label
	O Sort Using	This Field		Set Data Source
	Re	peat this column by	/	Edit Formating
				💼 Delete
SALES EMPLOYEE	LATEST SALE DATE	SALE PRICE SUM	# UNIQUE: SALES DE	
Delphine Calmes	Jul 31, 2021	\$2,598,137.46	1	
Edmond Zehrbach	Jul 31, 2021	\$2,305,532.83	1	
Hollie Pennigton	Jul 31, 2021	\$3,076,958.48	1	
•••				

We'll leave the aggregation type as sum and click the "Add" button in the filters panel.

Edit Column: Set Data Source	
Type Basic Calculated	
Field Sale Price	
Aggregation Type + Sum -	# UNIQUE: SALES DEP
Delphine C FILTERS + Add Edmond Ze	1
Hollie Penn There are no Filters	1
Cancel	

Next, we'll create a filter to only include data from records where the sales country is Canada or Australia.

by Year :	Delphine Calm	Edit Column	: Set Data Source		1
	Edma Add	Filter			1
	Field				
	Cou	ntry (Customers)		•	
	Match	iing			
		ales with Customers			
	Si	ales with Customers	s not matching		
	Filter	Туре		Add Equation	
	is ar	у -	Canada Australia		
	Can	cel		Done	
		Cancel		Done	

This is what our new column filter looks like.

ſ	Edit Column: Set Data Source	
	Туре	
	Basic Calculated	
	Field	
	Sale Price 🔹	
	Aggregation Type	
SALES E	+ Sum	UNIQUE: SALE
Delphin	FILTERS + Add	
Edmon Hollie P	Sales with Customers matching (Country: is Australia or Canada)	
Home P		
	Cancel Done	

When we click Done, we now have a column showing the sum of all sales in Australia and Canada for each employee.

SALES EMPLOYEE	LATEST SALE DATE	AUSTRALIA & CANADA	# UNIQUE: SALES DEPARTMENT
Delphine Calmes	Jul 31, 2021	\$645,452.38	1
Edmond Zehrbach	Jul 31, 2021	\$558,641.06	1
Hollie Pennigton	Jul 31, 2021	\$750,574.47	1

Repeating columns for scorecards

You can create repeating columns for Scorecards, Initiatives, and Datasets reports, but they're a little bit different for every report type. For Scorecards, values that change over time are always inside of a repeating column. Whenever you add a column like KPI Value or Goal, you'll automatically see that field repeating by calendar period. As you can see in this example, it doesn't make sense to show a KPI value without knowing what period that KPI value is for.



To edit repeating columns, just click on them. Just like when you select a column, selecting a repeating column header shows a tooltip. We'll click the Edit button.

				Edit
	Repeating column	s: Monthly		
NAME	ORGANIZATION	JUNE 2021	JULY 2021	A - DST 2021
NAME	ORGANIZATION	KPI VALUE	KPI VALUE	KP. ALUE
Total Revenue	Mobileworld Inc. Example	\$698K	\$702K	\$71 K
SEO Project Spend to Date	Mobileworld Inc. Example	232K	232K	232K
Test KPI	Mobileworld Inc. Example		6	6

This opens the Edit Repeating Columns dialog. We'll change the calendar to Quarterly, and we'll choose a range of 4 periods.

i ary by Year	Edit Repeatin	g Columns		
	CHOOSE A CALEN	DAR PERIOD		
	CALENDAR Qu	arterly 🔻		
	ТҮРЕ	elative By Date		1
	SHOW 3 F	eriods Earlier 👻 To	Current Period 🔻	•
				JULY 2021
	Cancel		Dor	
	Sales Revenue	Salas	V \$5 117 300 V \$5 2	10 300 SA 821 6

When we click Done, we now see the KPI value being repeated for four quarters.

NAME	ORGANIZATION	QUARTER 4, 2020	QUARTER 1, 2021	QUARTER 2, 2021	QUARTER 3, 2021
NAME	ORGANIZATION	KPI VALUE	KPI VALUE	KPI VALUE	KPI VALUE
Sales Revenue	Sales	\$13,839,900	\$14,591,600	\$15,230,600	\$13,483,100
New Customers	Sales	115	114	96	92
Number of Renewals	Sales	121	127	120	109

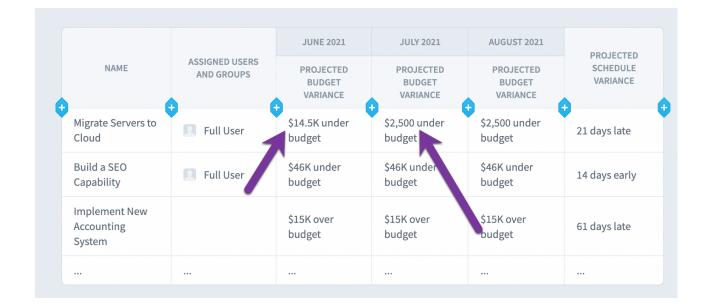
Repeating columns for initiatives

As we mentioned above, repeating columns work a little differently for every report type. Repeating columns for Initiatives are similar to repeating columns for Scorecards because there are values like Money Spent that change over time. Initiatives are different, however, because their repeating columns aren't required and aren't added by default. Whenever you have a column for a field that changes over time and it's not repeating, the report will just show the latest value.

In this example we have a column showing the projected budget variance for every initiative item. The projected budget variance field does change over time, but because this column isn't inside of a repeating column header, the report just shows the most up-to-date values for the projected budget variance. We do, however, see a "Repeat this column by calendar period" button.

	Column: P	rojected Budget Variance	🇱 Edit
	Grou	qu	
	Sort	Using This Field	
	Re	peat this column by calendar pe	eriod
NAME	ASSIGNED USERS AND GROUPS	PROJECTED BUDGET VARIANCE	PROJECTED SCHEDULE VARIANCE
Migrate Servers to Cloud	🔍 Full User	\$2,500 under budget	21 days late
Build a SEO Capability	Full User	\$46K under budget	14 days early
Implement New Accounting System		\$15K over budget	61 days late

When we click the button, we now have repeating columns showing how the projected budget variance has changed over time.



Repeating columns for datasets

You can only add repeating columns to dataset reports when individual records are turned off. That's because we need to first aggregate dataset records for each group before we can disaggregate the data into repeating columns. Scorecard and Initiative reports don't have this restriction because their repeating columns can show values that change over time.

In this example we're grouping by Sales Employee and are hiding individual records. We now see a "Repeat this column by..." button when you click on any column other than the one you're grouping by.

	Column: Sale Pri	ice	🌣 Edit	
	Group Agai	n		
	Sort using t	his field		
	Show Values For			
	Every Sale Price		•	
	Repeat this colu	imn by		
SALES EMPLOYEE	# UNIQUE: SALE DATE	SALE PRICE SUM	# UNIQUE: SALES DEPARTME	NT
Delphine Calmes	1,687	\$2,598,137.46	1	
Edmond Zehrbach	1,666	\$2,305,532.83	1	
Hollie Pennigton	1,795	\$3,076,958.48	1	

We'll click the "Repeat this column by..." button and then choose to repeat by Country.

	Column: Sale Pri	ce	🗱 Edit		
	Group Again	ı			
	Sort using t	his field			Repeat By More Options
	Show Values For			Q	Find
	Repeat this colu			Ge	Customer ID
				31	Sale Date
SALES EMPLOYEE	# UNIQUE: SALE DATE	SALE PRICE SUM	# UNIQUE: SALES DEP	53	Sale Price
+ Delphine Calmes +	1,687	\$2,598,137.46	1	Т	
Edmond Zehrbach	1,666	\$2,305,532.83	1	Т	Country (Customers)
Hollie Pennigton	1,795	\$3,076,958.48	1	Т	Customer Name (Customers)

We now have a separate Sale Price column for every country.

SALES EMPLOYEE	# UNIQUE: SALE DATE	CANADA	AUSTRALIA	UNITED STATES	UNITED KINGDOM	UNIQUE: SALES DEPARTMENT
SALES EMPLOTEE	# UNIQUE: SALE DATE	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	DNIQUE: SALES DEPARTMENT
Delphine Calmes	1,687	\$308,250.63	\$337,201.75	\$1,365,454.05	\$587,231.03	1
Edmond Zehrbach	1,666	\$267,421.59	\$291,219.47	\$1,224,105.67	\$522,786.10	1
Hollie Pennigton	1,795	\$360,376.61	\$390,197.86	\$1,607,217.55	\$719,166.46	1

Multiple blocks of repeating columns

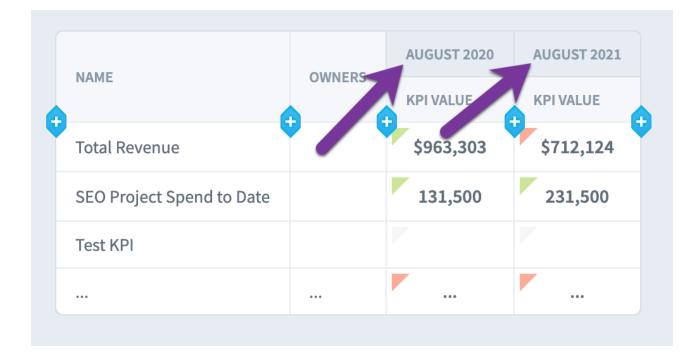
You're not limited to one range of repeating columns. In this example we're going to add a new column outside of the first block of repeating columns.

	OWNERS	JUNE 2021	JULY 2021	AUGUST 2021
NAME	OWNERS	KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue	1	\$697,974	\$701,874	\$712,124
SEO Project Spend to Date		231,500	231,500	231,500
Test KPI			6	

We'll choose to add another KPI Value column, and now we have two identical blocks of repeating columns.

	JUNE 2021	JULY 2021	AUGUST 2021	OWNERS	JUNE 2021	JULY 2021	AUGUST 2021
NAME	KPI VALUE	KPI VALUE	KPI VALUE	OWNERS	KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue	\$697,974	\$701,874	\$712,124		\$697,974	\$701,874	\$712,124
SEO Project Spend to Date	231,500	231,500	231,500		231,500	231,500	231,500
Test KPI		6				6	

Finally, we'll edit each repeating column block to contain a single period, and we'll drag and drop the blocks next to each other. Now we have a report showing the KPI value for the current month and the KPI value from the month one year ago.



Repeating columns again

Scorecard, Initiative, and Dataset reports can all repeat columns a second time when individual records are turned off. For Scorecard and Initiative reports, repeating again is almost always used when multiple organizations have the same initiative or scorecard items and you want to compare them across organizations. For datasets, repeating again is common with all field types.

		RETAIL				CORPORATE				
SALES EMPLOYEE	# UNIQUE: SALE DATE	UNITED KINGDOM	AUSTRALIA	CANADA	UNITED STATES	UNITED KINGDOM	AUSTRALIA	CANADA	UNITED STATES	DEPARTMENT
	•	SALE PRICE SUM								
Delphine Calmes	1,687	\$587,231.03	\$337,201.75	\$308,250.63	\$1,365,454.05	\$0	\$0	\$0	\$0	1
Edmond Zehrbach	1,666	\$522,786.10	\$291,219.47	\$267,421.59	\$1,224,105.67	\$0	\$0	\$0	\$0	1
Hollie Pennigton	1,795	\$719,166.46	\$390,197.86	\$360,376.61	\$1,607,217.55	\$0	\$0	\$0	\$0	1

To repeat again, click on the repeating column header to select it.

Then click "Repeat again by" and choose a field. Here we'll repeat by Sales Department.

	Repeating colum		1		
	Show Values For	y		Repeat again by More	Options
	Every Country			🕼 Customer ID	
SALES EMPLOYEE	# UNIQUE: SALE DATE	AUSTRALIA	UNITED STATES	🖾 Sale Price	PARTMEN
		SALE PRICE SUM	SALE PRICE SUM	T Sales Department	Repeat
Delphine Calmes	1,687	\$337,201.75	\$1,365,454.05	T Country (Customers)	
Edmond Zehrbach	1,666	\$291,219.47	\$1,224,105.67	T Customer Name (Customers)	
Hollie Pennigton	1,795	\$390,197.86	\$1,607,217.55		
					-

The result is a report with two levels of repeating columns, first by Sales Department and then by Country.

SALES EMPLOYEE		AUSTRALIA	UNITED STATES	CANADA	UNITED KINGDOM	# UNIQUE, CALES DEDADTMENT
SALES EMPLOTEE	# UNIQUE: SALE DATE	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	SALE PRICE SUM	# UNIQUE: SALES DEPARTMENT
Delphine Calmes	1,687	\$337,201.75	\$1,365,454.05	\$308,250.63	÷ 97,231.03	1
Edmond Zehrbach	1,666	\$291,219.47	\$1,224,105.67	\$267,421.59	\$522,76 10	1
Hollie Pennigton	1,795	\$390,197.86	\$1,607,217.55	\$360,376.61	\$719,166.46	1

On the Edit tab there are all Os for Corporate sales, but when you go to the View tab you can see that in this example employees either sell retail or corporate, never both.

View										Ed
		RETAIL				CORPORATE				
SALES EMPLOYEE	# UNIQUE: SALE DATE	UNITED KINGDOM	AUSTRALIA	CANADA	UNITED STATES	UNITED KINGDOM	AUSTRALIA	CANADA	UNITED STATES	# UNIQUE: SALES DEPARTMENT
		SALE PRICE SUM								
Delphine Calmes	1,687	\$587,231.03	\$337,201.75	\$308,250.63	\$1,365,454.05	\$0	\$0	\$0	\$0	1
Edmond Zehrbach	1,666	\$522,786.10	\$291,219.47	\$267,421.59	\$1,224,105.67	\$0	\$0	\$0	\$0	1
Hollie Pennigton	1,795	\$719,166.46	\$390,197.86	\$360,376.61	\$1,607,217.55	\$0	\$0	\$0	\$0	1
lssac Bernhardt	1,859	\$819,492.07	\$419,403.16	\$425,678.93	\$1,859,041.49	\$0	\$0	\$0	\$0	1
Kym Lavender	314	\$0	\$0	\$0	\$0	\$1,306,166.74	\$603,707.45	\$916,574.81	\$3,340,537.35	1
Micheline Turkasz	1,755	\$665,379.83	\$365,327.40	\$373,668.11	\$1,505,650.29	\$0	\$0	\$0	\$0	1
Odell Sheler	1,777	\$716,828.74	\$398,856.70	\$397,922.11	\$1,639,753.17	\$0	\$0	\$0	\$0	1
Russell Corrick	269	\$0	\$0	\$0	\$0	\$1,081,364.71	\$585,248.26	\$579,356.99	\$2,823,682.38	1

Changing header order

In this example we're showing KPI Value and Goal columns, repeating for 3 periods. The columns are on the bottom and the calendar periods are on top.

NAME	ODCANIZATION	OWNERS	APRIL 2021		MAY 2021		JUNE 2021	
NAME	ORGANIZATION	OWNERS	KPI VALUE	GOAL	KPI VALUE	GOAL	KPI VALUE	GOAL
Total Revenue	Mobileworld Inc. Example		\$693,274	\$765,000	\$697,574	\$765,000	\$697,974	\$765,000
SEO Project Spend to Date	Mobileworld Inc. Example		231,500	5,000	231,500	5,000	231,500	5,000
Product Revenue	Financial	Full User	\$441,024	\$465,000	\$443,424	\$465,000	\$441,624	\$465,000

To put the columns on top, just drag and drop them vertically.

NAME	ORGANIZATION	OWNERS	KPI VALUE	DAL KPI VA	LICOAL	KPI VALUE	GOAL 2021	
Total Revenue	Mobileworld Inc. Example		\$693,274	\$765,000	\$697,574	\$765,000	\$697,974	\$765,000
SEO Project Spend to Date	Mobileworld Inc. Example		231,500	5,000	231,500	5,000	231,500	5,000
Product Revenue	Financial	Full User	\$441,024	\$465,000	\$443,424	\$465,000	\$441,624	\$465,000

Now the report first groups by column, showing the three periods for KPI Value and then the three periods for Goal.

NAME	ORGANIZATION	OWNER	KPI VALUE			GOAL		
NAME		_	APRIL 2021	MAY 2021	JUNE 2021	APRIL 2021	MAY 2021	JUNE 2021
Total Revenue	Mobileworld Inc. Example		\$693,274	\$697,574	\$697,974	\$765,000	\$765,000	\$765,000
SEO Project Spend to Date	Mobileworld Inc. Example		231,500	231,500	231,500	5,000	5,000	5,000
Product Revenue	Financial	Full User	\$441,024	\$443,424	\$441,624	\$465,000	\$465,000	\$465,000
				·				

Hiding repeating column headers

Some reports have only one column, for example KPI Value. Other reports have only one repeating value, for example a single calendar period. In these situations, you can choose to hide either the column or the repeating value header.

For example, here we're showing the KPI Value for three months. The KPI Value isn't adding a lot to the report in this situation, so we've dragged the column header to the top.

NAME	ORGANIZATION	OWNERS	KPI VALUE		
NAME	ORGANIZATION	OWNERS	APRIL 2021	MAY 2021	JUNE 2021
Total Revenue	Mobileworld Inc. Example		\$693,274	\$697,574	\$697,974
SEO Project Spend to Date	Mobileworld Inc. Example		231,500	231,500	231,500
Product Revenue	Financial	Full User	\$441,024	\$443,424	\$441,624

We then select the column and turn on "Hide This Header". On the Edit table the header now has an icon showing that it's hidden.

		Colu	mn: KPI Value		🔅 Edit
			Sort using thi	s field	
			Hide This Hea	ıder	
NAME	ORGANIZATION	OWNERS	Ø	KPI VALUE	
NAME	ORGANIZATION	OWNERS	APRIL 2021	MAY 2021	JUNE 2021
Total Revenue	Mobileworld Inc. Example		\$693,274	\$697,574	\$697,974
SEO Project Spend to Date	Mobileworld Inc. Example		231,500	231,500	231,500
Product Revenue	Financial	Full User	\$441,024	\$443,424	\$441,624

On the View tab the column header is no longer visible.

View			E	Edit June	2021 🔻 <
NAME	ORGANIZATION	OWNERS	APRIL 2021	MAY 2021	JUNE 2021
Total Revenue	Mobileworld Inc. Example		\$693,274	\$697,574	\$697,974
SEO Project Spend to Date	Mobileworld Inc. Example		231,500	231,500	231,500
Product Revenue	Financial	Full User	\$441,024	\$443,424	\$441,624
Training Revenue	Financial	Full User	\$228,650	\$229,900	\$231,050
Book Revenue	Financial	Full User	\$23,600	\$24,250	\$25,300
Product Costs	Financial		\$275,841	\$275,799	\$275,832

When you're repeating again, you can even hide two levels of headers. In this example we're showing data for a single field and for a single calendar period. We've chosen to hide all of the headers except the KPI name.

	ø			KPI VALUE	KPI VALUE							
ORGANIZATION	Ø AUGUST 2021											
	SALES REVENUE	PRODUCT SALES REVENUE	TRAINING SALES REVENUE	BOOK SALES REVENUE	NEW CUSTOMERS	NUMBER OF RENEWALS	CLOSE RATIO					
(sales template)	663K	402K	225K	35.7K	5	8	0.33					
Africa	318K	128K	167K	23.2K	3	7	0.39					
Australasia	505K	244K	243K	18.1K	4	2	0.23					

Notes columns

When you add a notes column to your report, there's a "Set Note Display" option in the menu.

	Column: Notes	🌣 Edit	Edit Column					
	m		Set Column Label					
NAME	NOTES		Set Data Source	JUNE 2021	JULY 2021	AUGUST 2021		
in the	Norts	10123		Set Note Display		KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue	Applies to All Time by Spider Impact Administrator on May 13 I'm excited about how we're tracking revenue. For the first ti ERP systems talking with our data visualization tools. Great v	me, we have	Edit Formatti ig	\$698K	\$702K	\$712K		
SEO Project Spend to Date				232K	232K	232K		
Test KPI					6	6		

This allows you to choose not only the type of notes to show for your report, but also the information from each note you want to see.

NOTES TO S	HOW					
NOTES TO S	now					
NOTE TYPE	All F	Period Spec	ific Only	General O	nly	
CALENDAR	Current Calenda	ar 🝷				
SHOW	2 Periods Earlie	r 🔻 TO	Curren	t Period 🔻		
NOTE DETA	LS					
Created	d Date					
Author						
Calend	ar Period					
Scorec	ard Item					
Replies	5					
	rom Descendants					

Weight columns

A scorecard item's weight can change over time, but it often doesn't. If you add a Weight column to your report, it will show the most recent weight for that item.

NAME	WEIGHT	JUNE 2021	JULY 2021	AUGUST 2021
NAME		KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue	25%	\$698K	\$702K	\$712K
SEO Project Spend to Date	75%	232K	232K	232K
Test KPI	20%		6	6

If you add a Weight column inside of repeating calendar periods, it will show what the weight was at the end of the period. In the example, the "SEO Project Spend" KPI weight changes in August.

NAME	JUNE	2021	JULY 2	021	AUGUST	2021
NAME	KPI VALUE	WEIGHT	KPI VALUE	WEIGHT	KPI VALUE	WEIGHT
Total Revenue	\$698K	25%	\$702K	25%	\$712K	25%
SEO Project Spend to Date	232K	50%	232K	50%	232K	75%
Test KPI			6	20%	6	20%
					·	

SQL Reports

Basics

SQL Reports allow you to write raw SQL against a database that you have set up in Admin > Import Connections. To create a SQL report, click the "New Report" button.

û Mobilewor	ʻld Inc.	<	Device S	ales		C
PERSONAL	Q Find		View			Edit
요 Home 31 숬 Bookmarks	+ New Report	🗅 New Folder	SALE PRICE	CUSTOMER NAME	SALES EMPLOYEE	
	🗉 New Report		\$351.44	Kendall Nost	Issac Bernhardt	
Briefings	Device Sales		\$351.52	Roberto Feltz	Issac Bernhardt	
Dashboards	🔳 New Report		\$353.50	Lorriane Nevarez	Hollie Pennigton	
🗉 Reports	🔳 New Report		\$355.05	Chiquita Carrell	Delphine Calmes	
🕒 Charts	Device Sales 2		\$355.41	Adelaide Henneberry	Micheline Turkasz	
	 New Report Big Sales 0.5 		\$355.81	Evalyn Chancellor	Issac Bernhardt	

If you have the correct permissions, choose SQL for the report type.

e Sales	New Report: Cl	noose a Type			RS
Report					There are no Ro
e Sales 2					
Report				SQL	
iles 0.5	Scorecards	Initiatives	Datasets	SQL	
iles				_	
iles 2	Cancel		2	Next	

And write SQL against the database.

Hew Res		SCORECARDNODEID	LEFTBOUND	RIGHTBOUND	VERSIONID	ACTIVATE	ARCHIVE	CURF
New R	SQL Report							
Device								
New R	SQL QUERY							
New R	select * from score	aardnodos						
Device	Select " Hom Scol	ecarunoues						
New R								
Big Sal								
Big Sal								
Big Sal								
Hidder	Cancel Back		0 —	2			Finish	
Hidden	records, repeat	919	19	22	78			

SQL reports appear the same as other reports, except they can't have advanced formatting.

🛱 Mobileworl	d Inc. <	SQL Report						
PERSONAL	Q Find	View						Edit
£ Home 31 ☆ Bookmarks	+ New Report 🗅 New Folder	SCORECARDNODEID	LEFTBOUND	RIGHTBOUND	VERSIONID	ACTIVATE	ARCHIVE	CURRENCYSYMBOLISO3COUNTRY
PRESENTATION	🔳 New Report	915	1	72	122			
🛱 Briefings	Device Sales							
Dashboards	🔳 SQL Report	916	2	23	86			
Reports	🔳 New Report							
🕒 Charts	🔳 New Report							
FOUNDATION	Device Sales 2	917	3	12	72			
Scorecards	🔳 New Report							
Initiatives	Big Sales 0.5	918	13	18	77			
🕅 Datasets	🔳 Big Sales							
🕒 Files	Big Sales 2							
	Hidden records	919	19	22	78			
	Hidden records, repeat							
	🔳 Red KPIs							
Q ✿ ◀	*∃ Expand All ✓ Done ◀	You haven't saved the s	his report yet					Save

Example SQL

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	ins this period
uery	
	DATE_FORMAT(LOGINHISTORYDATE,'%Y-%m-%d %T') as TIME, LOGINHISTORYIP,
USERAL	IAS
from lo	oginhistory
where 3	LOGINHISTORYRESULT = 'failure'
and LO	GINHISTORYDATE > [calendar-period-start]

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

View		I	Edit	August	2019 🔻	< >
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					

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)		
ТІМЕ	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		

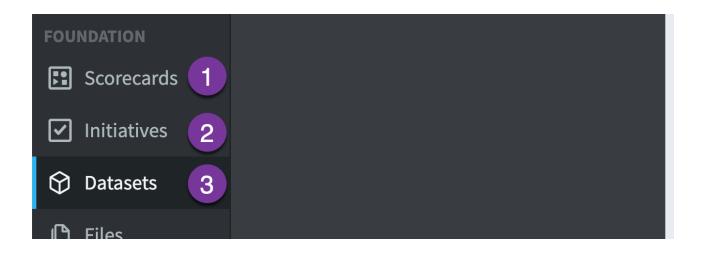
Datasets

Overview of Datasets

Overview

Spider Impact tracks three types of performance data.

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



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

The Explore tab

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

🛍 Mobileworld	Inc. Example <	Device Sales	0 * E ·
PERSONAL	Q Find	Explore Records	Edit
요 Home 1 숬 Bookmarks	+ New Dataset 🗅 New Folder	ACTIVE FILTERS	+ Add
PRESENTATION	☆ Sales	There are no Active Filters	
Dashboards		Choose a field 👻 🗄 List	NUMBER OF SALES
ReportsCharts		Choose a field to explore or filter!	29,085
ScorecardsInitiatives			
🛛 Datasets 🔶			

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

Viewing and filtering fields

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

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

Choose a field	- ↓ E List	NUMBER OF SALES 4
Choose a field to explore or filter!		

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

Choose a field	- ∓ E List	NUMBER OF SALES 🌣 29,085
T Customer ID		
Sale Date		
Sale Price		
T Sales Department		
T Sales Employee		
••• Keep typing for better matches		

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

Choose a field	- ↓ i∃ List	NUMBER OF SALES 🕸 29,085
SALES EMPLOYEE		* 🗇
SALES EMPLOYEE	NUMBER OF SALES	SALES %
Issac Bernhardt	5,717	19.66%
Odell Sheler	5,104	17.55%
Hollie Pennigton	4,943	17%
Micheline Turkasz	4,713	16.2%
Delphine Calmes	4,228	14.54%
Other (Show 3 More)	4,380	15.06%

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

Choose a field	•	E List
SALES EMPLOYEE		* 🛍
SALES EMPLOYEE	NUMBER OF SALES	SALES %
Issac Bernhardt	5,717	19.66%
Odell Sheler	5,104	17.55%
Hollie Pennigton	4,943	17%
Micheline Turkasz	4,713	16.2%
Delphine Calmes	4,228	14.54%
Other (Show 3 More)	4,380	15.06%
SALE DATE		* 🗇
SALE DATE	NUMBER OF SALES	SALES %
May 2021	728	2.5%
July 2021	726	2.5%
June 2021	703	2.42%

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

Choose a field				NUMBER OF SALES	\$
SALES EMPLOYEE				\$	Û
SALES EMPLOYEE		NUMBER OF SALES		SALES %	
Issac Bernhardt		168		23.08%	
Odell Sheler		133		18.27%	
Hollie Pennigton		126		17.31%	
Micheline Turkasz		111		15.25%	
Delphine Calmes		104		14.29%	
Other (Show 3 More)		86		11.81%	
SALE DATE				¢	Û
SALE DATE	NUMBER OF SALES		SALE	ES %	
May 2021	728		1000	%	

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

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

Exploring Dataset Data

Please see the <u>Overview of Datasets</u> article for information about what datasets are, and how to add and filter fields on the Datasets Explore tab.

Advanced filters

At the top of the Explore tab you can see all filters that are currently applied to the dataset. In this example we can see the "Sale Date = May 2021" filter that we applied by clicking on the "May 2021" row on the bottom. Another way to add a filter is to click on the "Add" button in the corner.

🛱 Mobileworld	Inc. Example <	Device Sales			0 * b * 0
PERSONAL	Q Find	Explore Records			Edit
Home Home	+ New Dataset 🗅 New Folder	ACTIVE FILTERS Sale Date: in May 2021			+ Add
DashboardsReports		Choose a field		← 🗄 List	NUMBER OF SALES 🔅 728
🕒 Charts		SALES EMPLOYEE			* 🛍
FOUNDATION		SALES EMPLOYEE	NUMBER OF SA	ILES	SALES %
Scorecards		Issac Bernhardt	168		23.08%
✓ Initiatives		Odell Sheler	133		18.27%
Datasets		Hollie Pennigton	126		17.31%
🕒 Files		Micheline Turkasz	111		15.25%
		Delphine Calmes	104		14.29%
		Other (Show 3 More)	86		11.81%
		SALE DATE			* 🗇
		SALE DATE	NUMBER OF SALES	SA	LES %
		May 2021	728	10	0%

Just for the sale of this example we'll only show sales employees that have an "O" in their names.

Add Filter	
Field	
Sales Employee	•
Filter Type	Add Equation
contains any 🔻 o	
is any	ter As An OR
is not any	
contains any 🗸 🗸	Done
contains all	
does not contain any	5
does not contain all	5
begins with	
ends with	
CALL DATE	

The results of the filter are the same as before, except now we're only showing data for four of the sales reps.

ACTIVE FILTERS				+	Au
Sale Date: in May 2021 Sale Date: Sa	ales Employee: contains	•			
Choose a field				NUMBER OF SALES	3
SALES EMPLOYEE				\$	ť
SALES EMPLOYEE		NUMBER OF SALES		SALES %	
Odell Sheler		133		39.12%	
Hollie Pennigton		126		37.06%	
Edmond Zehrbach		76		22.35%	
Russell Corrick		5		1.47%	
SALE DATE				٥	ť
< Back in May 2021					
< Back in May 2021 SALE DATE	NUMBER OF SA	LES	SAL	ES %	

Changing total display

Seeing the total number of sales is interesting, but what we probably care the most about is the total value if the sales. The quickest way is to change the total display in the upper right corner.

Choose a field		E List
		Change Total Display
SALES EMPLOYEE		Create Dataset KPI
SALES EMPLOYEE	NUMBER OF SALES	SALES %
Issac Bernhardt	5,717	19.66%
Odell Sheler	5,104	17.55%
Hollie Pennigton	4,943	17%
Micheline Turkasz	4,713	16.2%
Delphine Calmes	4,228	14.54%
Other (Show 3 More)	4,380	15.06%
		* 俞
SALE DATE		
SALE DATE	NUMBER OF SALES	SALES %
May 2021	728	2.5%
July 2021	726	2.5%
June 2021	703	2.42%

We'll change the display from "Number of Sales" to "Custom Field", choose "Sale Price" as the field we want to see, and "Sum" for the aggregation type.

hange Total Display	
Display	
Number of Sales Custom Field	
Choose Field To Display As Total	
Sale Price	
Aggregation Type	
+ Sum	
Cancel	Don

The sales price tells a completely different story. We now see that Kym Lavender is our top salesperson with \$6.1M in total sales, and that July 2021 was actually our top sales month by revenue.

Choose a field		
SALES EMPLOYEE		* 🗇
SALES EMPLOYEE	SALE PRICE SUM	SALE PRICE %
Kym Lavender	\$6.17M	21.41%
Russell Corrick	\$5.07M	17.6%
Issac Bernhardt	\$3.52M	12.23%
Odell Sheler	\$3.15M	10.95%
Hollie Pennigton	\$3.08M	10.68%
Other (Show 3 More)	\$7.81M	27.13%
		* 🗇
SALE DATE	SALE PRICE SUM	SALE PRICE %
July 2021		2.77%
	\$797K	2.11%
March 2020	\$743K	2.58%
August 2020	\$709K	2.46%

In this example, sale price is obviously better than the number of sales, so we're going to go to the Edit tab and change the "Defaults for Total Display".

🛍 Mobileworl	ld Inc. Example <	Device Sales	6 C
PERSONAL	Q Find	Explore Records	Edit
숬 Bookmarks	+ New Dataset D New Folder	Name Device Sales	Individual Records Track (Plural Noun) Sales
PRESENTATION		' Default App Calendar Field	Primary Key Column (From Source Data)
E Reports		None (Show all time)	No Primary Key
🕒 Charts			

We can make the change from "Number of Sales" to "Custom Field" so that next time someone explores the Device Sales dataset it will default to showing Sales Price.

Change Total I	Display		
Display			
Number of Sales	Custom Field		
Cancel		Do	one
			HIDE

Choosing columns

Another way to change the data being displayed is to manually choose a table's columns.

SALES EMPLOYEE		Options	🤹 t
SALES EMPLOYEE	SALE PRICE SUM	Choose Rows	>
Kym Lavender	\$6.17M	Choose Columns	
Russell Corrick	\$5.07M	Repeat Columns By	
Issac Bernhardt	\$3.52M	Repeat Rows By	
Odell Sheler	\$3.15M	Abbreviate Numbers	
Hollie Pennigton	\$3.08M	Showing 5 Rows	>
Other (Show 3 More)	\$7.81M	27.13%	

We're going to add an Average Sale Price column to the Sales Employee table to figure out why our employee rankings changed so much when we switched from number of sales to total sales value.

Explore	Records		
v Dataset 🖸 New Folder 🛛 🚺 Add a	Column		
vice Sales		tive Filters	
Field	Basic Calculated	•	i≣ List
	regation Type		SALE PRICE %
+ Sa Deci	mal Precision fault Decimal Precision	+ Add 합 ≡	21.41% 17.6%
Colu	mn Name	Done	12.23% 10.95%
Av	erage Sale Price 👻		10.68%
FILTE	RS + Ad	d	27.13%
	There are no Filters		
			SALE PRICE %
Cance	l	ne	2.77%
	at tare		2.58%

Sure enough, Kym and Russel had average sales around \$18,000 while everyone else was averaging less than \$700.

SALES EMPLOYEE			* 🛍
SALES EMPLOYEE	SALE PRICE SUM	SALE PRICE %	AVERAGE SALE PRICE
Kym Lavender	\$6.17M	21.41%	\$17.7K
Russell Corrick	\$5.07M	17.6%	\$18K
Issac Bernhardt	\$3.52M	12.23%	\$616
Odell Sheler	\$3.15M	10.95%	\$618
Hollie Pennigton	\$3.08M	10.68%	\$622
Other (Show 3 More)	\$7.81M	27.13%	\$1,847

Repeating rows and columns

Here's a simple table showing the sum and average sales price by month.

SALE DATE			\$ đ
SALE DATE	SALE PRICE SUM	AVERAGE SALE PRICE	
July 2021	\$797K	\$1,097	
March 2020	\$743K	\$1,232	
August 2020	\$709K	\$1,085	
June 2021	\$707K	\$1,006	
June 2020	\$684K	\$1,131	
Other (Show 5 More)	\$25.2M	\$61.1K	

We want to see those numbers by sales department, however, so we'll choose "Repeat Rows By..." from the options menu.

SALE DATE		Options 1	Û
SALE DATE	SALE PRICE SUM	Choose Rows	
July 2021	\$797K	Choose Columns	
March 2020	\$743K	Repeat Columns By	
August 2020	\$709К	Repeat Rows By	
June 2021	\$707K	Set As App Calendar	
June 2020	\$684K		
Other (Show 5 More)	\$25.2M	Abbreviate Numbers	
		Showing 5 Rows	

And we'll choose the Sales Department field.

Repeat Rows By				
Repeat Rows Repeat By				
Sales Department	Ð		•	
Cancel			Done	
Other (Show 5 More)		\$25.2M		

We can now see the sum and average sale price for each of our two sales departments for every month.

SALE DATE			* 1
SALE DATE	SALES DEPARTMENT	SALE PRICE SUM	AVERAGE SALE PRICE
July 2021	Corporate	\$357K	\$18.8K
July 2021	Retail	\$440K	\$622
	Corporate	\$280K	\$18.7K
June 2021	Retail	\$427K	\$621
Mar: 2021	Corporate	\$196K	\$19.6K
May 2021	Retail	\$454K	\$632
A	Corporate	\$139K	\$17.4K
April 2021	Retail	\$389K	\$626

Similarly, you can also choose "Repeat Columns By..." In this example we're repeating the sum and average sales columns by salesperson.

SALE DATE										<	× @
		MPLOYEE: IE CALMES				MPLOYEE: PENNIGTON		MPLOYEE: ERNHARDT		PLOYEE: KYM ENDER	SALE MICHE
SALE DATE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM								
July 2021	\$53.6K	\$602	\$52K	\$619	\$85.5K	\$620	\$92K	\$622	\$119K	\$17K	\$74.6K
June 2021	\$61.2K	\$624	\$54.8K	\$609	\$72.6K	\$632	\$85K	\$616	\$125K	\$17.8K	\$70.1K
May 2021	\$64.9K	\$624	\$49.1K	\$647	\$79.8K	\$633	\$109K	\$650	\$94.6K	\$18.9K	\$66.6K
April 2021	\$49.9K	\$616	\$49.1K	\$606	\$68K	\$624	\$76.2K	\$630	\$32.2K	\$16.1K	\$65.8K
March 2021	\$56.8K	\$638	\$52.5K	\$617	\$69.8K	\$629	\$82.5K	\$620	\$69.3K	\$9,903	\$61.6K
February 2021	\$56.9K	\$632	\$55.5K	\$646	\$68.1K	\$636	\$79.4K	\$616	\$77.4K	\$12.9K	\$66.7K
January	\$65.8K	\$621	\$52.6K	\$627	\$71.3K	\$625	\$77.4K	\$619	\$97K	\$13.9K	\$71.7K

Saving views

As mentioned earlier, the Datasets section is not meant to be a presentation tool. There are times, however, when you'll want to save the tables and filters that are on the Explore tab so you can view them later. All you need to do is click the Save button on the bottom...

🛍 Mobilewor	ld Inc. Example	<	Device Sa	ales								0	*	0
PERSONAL	Q Find		Explore	Record	s									Edit
값 Bookmarks	+ New Dataset	🗅 New Folder	ACTIVE FILTE	ACTIVE FILTERS										+ Add
PRESENTATION	Device Sales There are no Active Filters													
 Dashboards Reports 			Choose a fiel	d							- i∃ List		ALE PRICE SU 28,804,269	
🕒 Charts			SALE DATE										4	¢ 🗇
FOUNDATION				SALES E DELPHI	MPLOYEE: NE CALMES	SALES E EDMOND	MPLOYEE: ZEHRBACH	SALES E HOLLIE F	MPLOYEE: PENNIGTON	SALES E	MPLOYEE: ERNHARDT	SALES EM	PLOYEE: KYM ENDER	SALE MICHE
✓ Initiatives			SALE DATE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM								
Datasets			July 2021	\$53.6K	\$602	\$52K	\$619	\$85.5K	\$620	\$92K	\$622	\$119K	\$17K	\$74.6K
🕒 Files			June 2021	\$61.2K	\$624	\$54.8K	\$609	\$72.6K	\$632	\$85K	\$616	\$125K	\$17.8K	\$70.1K
			May 2021	\$64.9K	\$624	\$49.1K	\$647	\$79.8K	\$633	\$109K	\$650	\$94.6K	\$18.9K	\$66.6
			April 2021	\$49.9K	\$616	\$49.1K	\$606	\$68K	\$624	\$76.2K	\$630	\$5 2K	\$16.1K	\$65.8K
			March 2021	\$56.8K	\$638	\$52.5K	\$617	\$69.8K	\$629	\$82.5K	\$620	\$69.3K	\$9,903	\$61.6K
			February 2021	\$56.9K	\$632	\$55.5K	\$646	\$68.1K	\$636	\$79.4K	\$616	\$77.4K	\$1. NK	\$66.7K
	Å		January	\$65.8K	\$621	\$52.6K	\$627	\$71.3K	\$625	\$77.4K	\$619	\$97K	\$13.9K	\$71.7K
Q 🖨 🖣	ির মুল্ল Expand All	🎤 Edit 📢	January			\$52.6K	\$627	\$71.3K	\$625	\$77.4K	\$619	\$97K	\$13.9K	

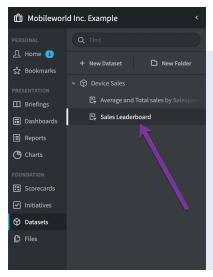
Give the Dataset View a name...

5	New Dataset View	
	Name	EMPLOYEE: PENNIGTON
	Average and Total sales by Salesperson and Month	AVERAGE SALE PRICE
	Cancel Save	\$620
Jür	ne 2021 \$61.2K \$624 \$54.8K \$609 \$72.6P	K \$632

And it will add your saved view underneath the dataset in the navigation pane.

🛱 Mobileworld Inc. Exampl	e <	Average a	Average and Total sales by Salesperson and Month						0	0 * b = 0			
PERSONAL Q Find		Explore	Explore Records								Edit		
요 Home 1 + New Data 숬 Bookmarks	set 🗅 New Folder	ACTIVE FILTER	ACTIVE FILTERS								-	- Add	
PRESENTATION	ales					The	re are no Ac	tive Filters					
Briefings Even	age and Total sales by Salespers												
Dashboards		Charse a fiel	d							r i∃ List		ALE PRICE SU 28,804,269.	
 Reports Charts 											•	20,004,209.	40
		SALE DATE										\$	
FOUNDATION Scorecards				MPLOYEE: IE CALMES		MPLOYEE: ZEHRBACH		MPLOYEE: PENNIGTON		MPLOYEE: ERNHARDT		PLOYEE: KYM ENDER	SALE
✓ Initiatives		SALE DATE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM	AVERAGE SALE PRICE	SALE PRICE SUM
⑦ Datasets		July 2021	\$53.6K	\$602	\$52K	\$619	\$85.5K	\$620	\$92K	\$622	\$119K	\$17K	\$74.6K

You can use dataset views as starting points for further data exploration, and they're shared by everyone who uses the dataset.



Sales Leader	rboard			0 * b * 0
Explore Re	ecords			Edit
ACTIVE FILTERS				+ Add
		There are no	Active Filters	
Choose a field				st NUMBER OF SALES 🔅 29,085
SALES EMPLOYEE				* 🛍
SALES EMPLOYEE		SALE PRICE SUM	NUMBER OF SALES	AVERAGE SALE PRICE
Kym Lavender		\$6.17M	348	\$17.7K
Russell Corrick		\$5.07M	282	\$18K
Issac Bernhardt		\$3.52M	5,717	\$616
Odell Sheler		\$3.15M	5,104	\$618
Hollie Pennigton		\$3.08M	4,943	\$622

Creating and Editing Datasets

Creating a dataset

To create a new dataset, click on the "New Dataset" button at the top of the navigation pane.

🛱 Mobileworl	d Inc. Example <	Device Sales	0 🛧 🕒 🗸 O
PERSONAL	Q Find	Explore Records	Edit
요 Home 1 숬 Bookmarks	+ New Dataset 🗅 New Folder	ACTIVE FILTERS	+ Add
PRESENTATION	🗇 Dr ice Sales	There are no Active Filters	
Dashboards		Choose a field	NUMBER OF SALES
🖽 Reports			29,085
🕒 Charts		Choose a field to explore or filter!	
FOUNDATION Scorecards			

This brings up the new dataset dialog. The "Dataset Name" is what you want to call your dataset, and it shows up in the navigation pane on the left. The answer to "Individual Records Track" should be the plural form of one row of your data. In this example, we're tracking device customers, so we're entering "Customers". Finally, we can either get data from a database or spreadsheet, and we're choosing spreadsheet.

New Dataset 🗅 New Folder		
	Create Dataset	
Device Sales		
) New Dataset	The dataset name is whatever you want to call the dataset you're creating. For Individual Records Track (Plural Noun), we want to know what each dataset record represents. For example, if every row of data is one employee, type in Employees. If every row of data represents one contract, type in Contracts.	- i≣ List 29,08
	Dataset Name	
	Device Customers	
	Individual Records Track (Plural Noun)	
	Customers	
	Data Source	
	Spreadsheet Database	
	Cancel 1 2 3 4 5 Next	

You can build a dataset from either a spreadsheet or a database. In this example we have a spreadsheet containing information about each of our customers that looks like this. Notice how each customer has a Customer ID in the first column.

•	😑 🔵 🛛 AutoSa	ave 💴 🎧 🗄	B 🗭 🥍 🔿		Cust	omers ~						ର 😳
01	me Insert	Draw Page La	ayout Formula	s Data Review	View Acrobat 🔉 Tell me					¢.	Share 🖓 🖓 C	omments
	iste 🗳 E		• 12 • A^ • <u>◇</u> • <u>A</u> •	· = = = ■ · = = ≫·	\$ * % 9 5.00 -00	Format	les 🗸 🛗 Forma	e v ↓ ZV v at v ⊗ v Filter	Find & Ar	alyze Sensi	tivity	
1	Possible Data Lo	ss Some features		save this workbook in t	he comma-delimited (.csv) format. To	preserve the	se features, save it in an Exce	el file format.				Save As
	A	В	с	D	E	F	G	н	1	J	К	
ſ	Customer ID	POC First Name	POC Last Name	POC Phone Number	POC Email	Company	Address	City	County	State or Pro	v Postal Code	Countr
- 14	AAAV-22209	Seth	Galavda	503-365-5894	seth.galavda@gmail.com	company	4752 Main St #6713	Portland	Multnomah			United
	AABI-37357	Randy	Ferko	352-616-2023	randy@aol.com		3556 S 21st St	Ocala	Marion	FL		United
	AACE-49383	Nieves	Denegre	510-635-8891	nieves.denegre@cox.net		6278 Pali Momi St #3	San Leandro	Alameda	CA		United
	AACG-26513	Ema	Coodey	216-868-4825	ema.coodey@coodey.com		32 N Trimble Rd	Maple Heights	Cuyahoga	ОН		United
	AADO-16329	Ezequiel	Hitz	01528-767210	ehitz@hitz.co.uk		61 Maddox St	Bryanston and Dors			W1U 6BU	United
	AADU-61935	Clinton	Leitheiser	718-520-1697	clinton_leitheiser@hotmail.com		16573 Solano Way	Brooklyn	Kings	NY		United
	AAEB-49062	Emmett	Disabato	615-984-8565	emmett@hotmail.com		6396 S Academy Blvd	Franklin	Williamson	TN		United
	AAFP-40137	Gigi	Magsayo	973-383-8091	gigi@magsayo.com		517 Salina Meadows Pky		Sussex	NJ		United
	AAGT-61111	Julian	Reinert	513-895-7160	julian reinert@gmail.com		383 Old Columbia Pike	Cincinnati	Hamilton	он		United
	AAHE-89127	Bell	Hadson	856-257-8049	bell hadson@hadson.org		69 Park Ave	Riverton	Burlington	NJ		United
	AAHF-19505	Nga	Gantewood	780-399-3563	nga gantewood@cox.net		96 E 67th St	Edmonton	burnington	AB	T6H 0H9	Canada
	AAHT-21210	Lyle	Newes	03-1188-5037	lyle.newes@yahoo.com		27 Hazel St #3965	Bogong		VIC		Austral
	AAJF-36401	Randee	Engelkemier	301-971-4993	randee@gmail.com		7 Buena Vista Ave	Waldorf	Charles	MD		United
	AAJN-83472	Shawana	Swamm	541-287-9653	shawana@gmail.com		4 Justice Rd	Eugene	Lane	OR		United
	AAKG-23153	Andreas	Starek	973-634-3333	andreas.starek@cox.net		4 Veterans Blvd	Orange	Essex	NJ		United
	AAKQ-27642	Angeles	Amsden	02-9557-3858	angeles@gmail.com		490 Fairfield Rd	Crows Nest	LUJER	NSW		Australi
	AAKU-79994	Lora	Haran	514-616-2900	Iharan@hotmail.com		63 N Magnolia Ave	Montreal		QC	H3T 1B8	Canada
	AALE-46423	Filomena	Muschett	212-260-5945	filomena.muschett@cox.net		51632 W Oak St	New York	New York	NY		United
	AAU-34382	Jessica	Arris	01971-401513	jessica arris@yahoo.com		5 Lord Nelson St	Rawcliffe	E Riding of Y		DN14 8TL	United
	AALZ-25758	Marcelo	Hinahon	02-3456-6002	marcelo@yahoo.com		711 Groesbeck Hwy	Carrington	L maning of 1	NSW		Austral
	AAMI-65402	Gerry	Dubel	418-495-6994	gerry@hotmail.com		518 S Mullen St	Albanel		QC	G8M 3H5	Canada
	AAMQ-81658	Shantelle	Demming	215-610-3435	sdemming@demming.com		6224 Fort Myer Dr	Ambler	Montgomer			United
	AAMV-72131	Loreta	Hutchins	01632-702159	lhutchins@gmail.com		6 Bedford St North	Addingham	West Yorksh	•	LS29 0JQ	United
-	AANI-24940	Ima	Breer	316-390-4501	ima breer@yahoo.com		63703 Felix Valdez Ave	Wichita	Sedgwick	KS		United
	AANM-57352	Emile	Trass	01356-426596	emile@hotmail.com		52 Anson St	Valley Ward	South Yorks		S65 3LR	United
	AAOJ-10884	Quiana	Desiardins	973-619-1623	guiana.desiardins@aol.com		98 Hamilton Blvd	Short Hills	Essex	NJ		United
	AAOV-36243	Jermaine	Snowden	01307-657754	iermaine@hotmail.com		4 Gresham St	Cwm Cadnant Com			LL59 5NS	United
	AAOM-58435	Patricia	Pretzer	01307-037734	natricia pretzer@pretzer pet au		3584 S Michigan Ave #17			WA		Australi
	Custome									-		

There are multiple options for where to get spreadsheets. To fully automate your data flow, you can schedule an import from Google Sheets or an (S)FTP server. If you want to build multiple datasets from the different worksheets in an Excel file, you'll probably want to store a single file in the Files section and build your datasets from that. See the <u>Updating Datasets</u> article for more information.

For now, we'll just keep it simple and upload a file.

D New Folder	M	
	Import a Spreadsheet	
	 You can pull data from an Excel spreadsheet or a CSV file. List your field names in separate columns in the first row Each row after the first will become a distinct record CSV imports are much faster than Excel You can import a zip file containing multiple spreadsheets Choose A Source Select A File	II List
	Customers.csv Customers.csv	
	Cancel Back Cance	

Once the spreadsheet is uploaded, Spider Impact starts to scan and process it. This may take anywhere between a few seconds and many minutes, depending on the size of your data.

When it's done processing, the next step is to choose the header row that contains the column labels. If you're using an Excel file with multiple worksheets, you'll choose which worksheet you want to use on this step too.

Many spi on that r		e header data ti	hat you don't wa	nt to import in f	the first few rows, for example column	n labels or a sp	readsheet title. I	f one of these row:	s contains your col	umn labels, be	sure to flip	the switch
EXAMPLE	DATA FROM TH	E SPREADSHEE	T									
COLUMN LABELS	A	В	с	D	E	F	G	н	1	J	к	L
	Customer ID	POC First Name	POC Last Name	POC Phone Number	POC Email	Company	Address	City	County	State or Province	Postal Code	Country
	AAAV- 22209	Seth	Galayda	503-365- 5894	seth.galayda@gmail.com		4752 Main St #6713	Portland	Multnomah	OR	97209	United States
	AABI- 37357	Randy	Ferko	352-616- 2023	randy@aol.com		3556 S 21st St	Ocala	Marion	FL	34470	United States
	AACE- 49383	Nieves	Denegre	510-635- 8891	nieves.denegre@cox.net		6278 Pali Momi St #3	San Leandro	Alameda	CA	94577	United States
	AACG- 26513	Ema	Coodey	216-868- 4825	ema.coodey@coodey.com		32 N Trimble Rd	Maple Heights	Cuyahoga	ОН	44137	United States
	AADO- 16329	Ezequiel	Hitz	01528- 767210	ehitz@hitz.co.uk		61 Maddox St	ryanston and Dorset Square Wa	Greater London		W1U 6BU	United Kingdom
	AADU-	Clinton	Leitheiser	718-520-	clinton_leitheiser@hotmail.com		16573	Brooklyn	Kings	NY	11215	United

The <u>data transformation</u> step is next, and it allows you to apply powerful transformations to your data as it's imported. You can skip records, combine fields together, or clean dirty data.

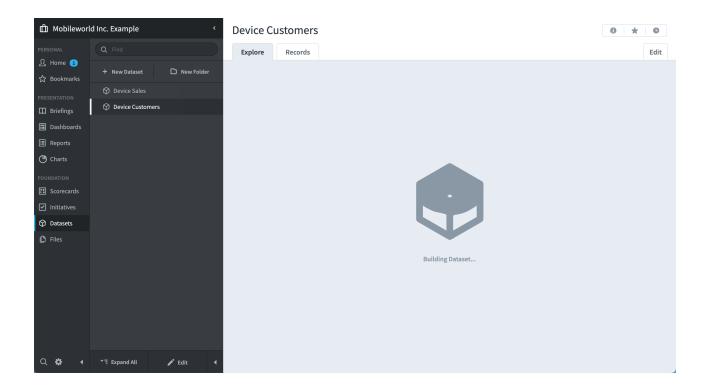
	There are no Active Filters
Transform the data	
transformations to:Ignore all records where the age fieldChange all "USA" country field values	
TRANSFORMATIONS Your source data will be use	+ Add Transformation
Cancel Back 🕑	

Finally, you choose which fields you want to include in your dataset. This is your first opportunity to choose a better name or data type for each field, but you can always edit fields on the Edit tab later.

In this example we're also setting Customer ID as the primary key, which allows us to update records later as well as link datasets together.

🛱 Mobileworld	d Inc. Example	ć	Device Cales					0 * 6-
PERSONAL	Q Find	Creat	e Dataset: Create Field	Is				Edit
요 Home 🚯	+ New Dataset 🗅 Ne		ch fields do you want to add to you ays add, edit, and delete fields late		out getting everyth	ning perfect here. You can		+ Add
PRESENTATION	Device Sales							
Briefings	③ New Dataset	IMPC	RTED DATA FROM CUSTOMERS.CS	V				
Dashboards			FIELD	SOURCE FIELD	DATA TYPE	EXAMPLE DATA	+ i≣ List	NUMBER OF SALES
Reports			Customer ID	Customer ID	T Text ▼	AAAV-22209		29,085
🕒 Charts			POC First Name	POC First Name	T Text •	Seth		
FOUNDATION			POC Last Name	POC Last Name	T Text -	Galayda		
✓ Initiatives			POC Phone Number	POC Phone Number	T Text -	503-365-5894		
Datasets			POC Email	POC Email	T Text -	seth.galayda@gmail.com		
Files			Company	Company	T Text -	Norton, William L lii		
			Address	Address	T Text -	4752 Main St #6713		
			City	City	T Text -	Portland		
			County	County	T Text -	Multnomah		
				Primary	Key Column	Customer ID		
0,‡ +	*≒ Expand All 🖌 Edit	Cance	Back	0-0-0	-0-6	Done		

After you click Done it can take several minutes or longer for your dataset to build, depending on the amount of data.



Editing datasets

To edit a dataset, just go to its Edit tab. Here you can modify several things that you set up when initially building the dataset.

🛍 Mobileworl	d Inc. Example <	Device Cust	omers						00
PERSONAL	Q Find	Explore	Records						Edit
∴ Home 1 ☆ Bookmarks PRESENTATION □ Briefings □ Dashboards □ Reports (*) Charts	+ New Dataset New Folder Image: Device Sales Image: Device Customers	Name 1 Device Custome Default App Cale None (Show all	endar Field	ords	•	Customers	ds Track (Plural Noun) 2 umn (From Source Data) 3 Defaults for Total Display		-
FOUNDATION Scorecards Initiatives Totates Files Files		FIELDS	0 5					5	6 7 + Add
		Address	DATA TYPE		EDIT	HIDE	CATEGORIES & RANGES		÷

- 1. The dataset name that shows in the navigation pane.
- 2. Used throughout the app to identify what is stored in the dataset, for example the total box.
- 3. The primary key field.
- 4. The data source.
- 5. Optional data transformations.
- 6. Upload a new spreadsheet. For connections to Databases, Google Sheets, and (S)FTP this will be a "Fetch Data" button to pull in the latest data.
- 7. Download the most recently imported spreadsheet.

Editing fields

You can edit dataset fields on the Edit tab by clicking on their edit buttons.

evice Cu	stomers					00
Explore	Records					Edit
FIELDS						+ Add
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	
Address	Text	Address			no categories	× 🖻
City	Text	City			no categories	— / 🖻
Company	Text	Company			no categories	1
Country	Text	Country			no categories	/
County	Text	County			no categories	1 🗇
			✓ Expand			

This opens the Edit Field dialog.

nc. Example <	Davice Customers	
Q Find	Edit Field	
+ New Dataset 🗅 New Folder	Type 3 Column (From Source Data)	
⑦ Device Sales	Basic City	ATEGORIES & RANGES
Device Customers	Name	no categories
	City	no categories
	Field Group	no categories
	Choose or create a Field Group (optional)	no categories
2	Data Type	no categories
2	T Text -	
	Allow This Field's Values To Be Overridden	
5	Hide From Non-Administrators	
	Cancel	
*∃ Expand All ✓ Done ◀	P. woke El herere	

- 1. The field name
- 2. The field's data type, for example Text, Date, Number, Etc.
- 3. A Basic field is simple, it's just one column of data. You can also create fields that are Calculated or Data Clusters, which are covered below.
- 4. The column to use for the basic field.

5. Hide From Non-Administrators allows you to prevent a field from showing in Spider Impact. For example, if you're you're using a private ID number to link multiple datasets together, you could use that field for linking on the Edit tab, but choose to hide that field everywhere else.

Dataset rebuilding

There's a "Rebuild Dataset" button that rebuilds a dataset with the same data it had before. If you run into an unexpected problem, sometimes manually forcing a rebuild can fix it.

lame	Individual Records Track (Plural Noun)
Device Sales	Sales
Record ID Column (From Source Data)	
No Record ID Column	Rebuild Dataset
Allow manually adding new records	This rebuilds the dataset with all the same data it had before. If you run into a problem, sometimes a rebuild can fix it.
ATASET CONNECTION	

Datasets also rebuild automatically whenever you add or edit one of its fields, or when you edit a field used by one of its calculated fields. This rebuild is the same as the initial build described above, except that the dataset is completely usable while it's being rebuilt. Users will continue to see the old data until the new data is ready.

Explore	Records				Edit
Updated data	for this dataset will be availa	able soon. You're still able t	o view the old data in th	ne meantime.	
ACTIVE FILTER	s	There ar	re no Active Filters		+ Add
Choose a field	i				NUMBER OF SALES 🌣
C c	Choose a field to explore or	r filter!			

Other situations that cause a dataset to rebuild are <u>updating dataset records</u> and <u>editing rollup trees</u>. Renaming fields or changing a dataset's permissions do not trigger rebuilds.

Field groups

Field Groups allow you to organize your fields into groups. Here we're creating a "Point of Contact" field group and adding several fields to it.

New Folder	FIELDS				
	Edit Field			HIDE	CATEG
	Туре	Column (From Source Data)			
	Basic -	POC Email	-		
	Name				
	POC Email				
	Field Group				
	Point of Contact		•		
	+ Add Point of Contac	t 🖑			
	••• Choose or create a Field	l Group (optional)			
	Allow This Field's Value	es To Be Overridden			
	Hide From Non-Admin	istrators			
	Cancel		Done		

Now whenever we see a list of fields for this dataset, the Point of Contact fields will be grouped together.

Choose a field	NUMBER OF CUSTOMERS 🌣 19,958
T City	
T Company T Country	
T County T Postal Code	
T State or Province POINT OF CONTACT	
T POC Email T POC First Name	
T POC Last Name	
T POC Phone Number	

Field categories and ranges

When we add the Sale Price field to the Explore tab, it lists every single unique price in the table. This isn't particularly helpful because the most common sale price of \$411 only appeared on 6 sales.

SALE PRICE		* 🛍
SALE PRICE	NUMBER OF SALES	SALES %
\$411	6	0.02%
\$675	6	0.02%
\$683	6	0.02%
\$702	6	0.02%
\$377	5	0.02%
Other (Show 5 More)	29.1K	99.9%

To fix this, let's visit the dataset's Edit tab, scroll down to the Fields table, and click on the Sale Price field's Ranges button.

Explore Recor	ds						Edi
FIELDS							+ Add
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES		
Customer ID	Text	Customer ID			no categories	/	đ
Sale Date	Date	Sale Date				1	đ
Sale Price	Currency	Sale Price			no ranges	/	Û
Sales Department	Text	Sales Department			no categories	1	Û
Sales Employee	Text	Sales Employee			no categories	1	đ

To add a range, click on the add button in the corner.

Add Ranges: S	ale Price	
RANGES		+ Add
	There are no Ranges	
Cancel		Done

Then we'll create our first range. In this example, the "inexpensive" range is anything less than \$400.

Edit Range	Data	set link to	Contamor ID
Name			
Inexpensive			
More Than Or Equal To		Less Than	
	\$	400	\$
include blank values in ra	inge		
Cancel			Done
		_	

Then we'll add three more ranges.

RANGES	+ Add
Inexpensive less than \$400	1
Mid-range \$400 or more, less than \$900	1
Expensive \$900 or more, less than \$1,500	/ 🗊
Bulk Orders \$1,500 or more	1

Now when we explore Sales Price, it defaults to showing the four ranges we created. This is much more usable information.

SALE PRICE			۵	Û
SALE PRICE	NUMBER OF SALES	SALES %		
Inexpensive	2,611	8.98%		
Mid-range	24.5K	84.35%		
Expensive	1,339	4.6%		
Bulk Orders	603	2.07%		

At any point you can switch back to showing every sales price.

POC Phone Number	Text	POC Phone Numbe r	no categories	1 1
Postal Code	Text	Postal Code	no categories	1
State or Province	Text	State or Province	no categories	/ 🗇

Fields with data types like Text have categories instead of ranges.

SALE PRICE		< Choose rows	* 🗇
SALE PRICE	NUMBER OF SALES	Every Sale Price	
Inexpensive	2,611	 Every Sale Price Range 	
Mid-range	24.5K	Sum Everything	
Expensive	1,339	Average Everything	
Bulk Orders	603	Minimum	
		Maximum	
		Number Of Unique	

The idea is the same, but you choose specific values for every category. Note how in this category we've also included blank values.

Edit Category
Name
US South
Content AR KY FL LA GA AL <i>Blank</i>
АВ
ACT
АК
Δ7

Dataset Equations: Fields and Filters

Calculated dataset fields

You can build dataset fields that are calculations based on other dataset fields. This includes fields in other datasets. To do this, we'll click the "Add" button in the Fields panel on the Datasets Edit tab.

FIELDS						+ Add		
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES			
Address	Text	Address			no categories	1		
City	Text	City			no categories	1		
Company	Text	Company			no categories	1 🗇		
Country	Text	Country			no categories	/ 🗇		
County	Text	County			no categories	1		
✓ Expand								

This opens the Add Field dialog. We'll choose Calculated for the type and we'll click "Set Equation".

Type Equation Calculated Set Equation Name Customer Name Field Group Choose or create a Field Group (optional) Data Type The provide the set of the set o	Add Field 🥒	/	
Calculated Set Equation Name Customer Name Field Group Choose or create a Field Group (optional) Data Type		Equation	
Customer Name Field Group Choose or create a Field Group (optional) Data Type			
Field Group Choose or create a Field Group (optional)	Name		
Choose or create a Field Group (optional)	Customer Name		
Data Type	Field Group		
	Choose or create a Field G	roup (optional)	•
T Text	Data Type		
	T Text		
	Hide From Non-Admin	istrators	
Hide From Non-Administrators			
Hide From Non-Administrators	Cancel		Don

Now we can build the field's equation by choosing dataset fields on the bottom, clicking the "add" button to add them to the equation panel above, and by typing text directly in the equation panel.

dd Field	
Equation	wred input: + - * /
if([Company]] != "", [Company] , [Po	OC First Name] + " " + [POC Last Name])
CHOOSE SOURCE FIELD OR COLUMN	
Dataset	Column (From Source Data)
Customers	✓ POC Last Name ✓ Add

In this example, we've got a Customers dataset and we're building a calculated field to track the customer's name. The equation says to use the "Company" field for the customer name if it's not empty. If there's no company specified, use a combination of the point of contact first and last names.

if([Company] != "", [Company], [POC First Name] + " " + [POC Last Name])

FIELDS + Add DATA TYPE NAME SOURCE EDIT HIDE **CATEGORIES & RANGES** Address Address Text no categories 1 面 City no categories City Text 面 Company Text Company no categories 1 俞 Text Country no categories Country 俞 County County no categories 1 Ô Customer ID Text Customer ID no categories 1 if([Company] != "",[Company],[POC Fir st Name] + " " + [POC Last Name]) **Customer Name** Text no categories 1 面 Postal Code Postal Code no categories Text 面

Once we build the calculated field, it is listed with all of our other fields in the Fields panel.

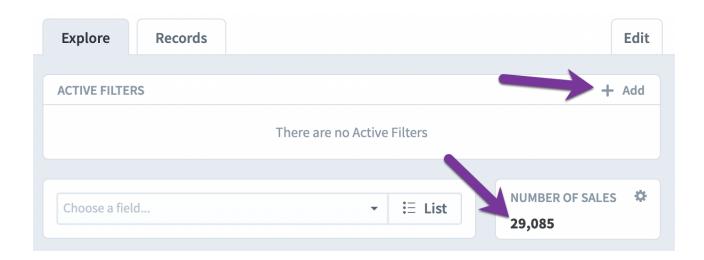
Here's our new customer name field on the Records tab.

Q Find	Explore	Records							Edit
+ New Dataset 🗅 New Folder	ACTIVE FILTERS							•	+ Add
Mobileworld Output Customers		There are no Active Filters							
Device Sales	RECORDS (1,000	0 OF 19,958)							+ Add
 分 test 分 Example: Seasonal 	ADDRESS	СІТҮ	COMPANY	COUNTRY	COUNTY	CUSTOMER ID	CUSTOMER NAME	POC EMAIL	POC FI
Example: Trend	4752 Main St #6713	Portland		United States	Multnomah	AAAV- 22209	Seth Galayda	seth.galayda@gmail.com	Seth
分 Sales分 Sales2	3556 S 21st St	Ocala		United States	Marion	AABI- 37357	Randy Ferko	randy@aol.com	Randy
 D DAMIS 𝔅 DSAID 	6278 Pali Momi St #3	San Leandro		United States	Alameda	AACE- 49383	Nieves Denegre	nieves.denegre@cox.net	Nieve
😚 NFL Combine	32 N Trimble	Maple		United	Cuwahoga	AACG-	Ema	ama coodev@coodev.com	Ema

For information about all of the functionality that equations support, please see the <u>Equations</u> article.

Filter equations

Dataset filters are used throughout Impact. For example, here we're on the Datasets Explore tab seeing all 29,085 total records. We'll add a filter by clicking on the "add" button in the Active Filters panel.



The "is any" filter allows you to choose specific field values. In this example we're showing records where the Sales Employee is "Delphine Calmes". You can also click the "add equation" button.

Add Filter	
Field	
Sales Employee	-
Filter Type	Add Equation
is any 👻 Delphine Calmes	
Cancel	Done

This opens a dialog where you can build an equation to match field values against. In this nonsense example, we're matching records where the sales employee field matches the sales department field with " test" added to the end.

Set Equation	
Sales Employee Equation	allowed input: + - */()
[Sales Department] + " test"	
Field	
Sales Department	✓ Add
Cancel	Done

Here's what our filter looks like when we're done.

Add Filter		
Field		
Sales Employee		-
Filter Type	↓	Add Equation
is any 👻 Delphine C	Calmes [Sales Department]	+ " test"
Cancel		Done

You can write equations against more than just text. In this example we're adding an "after" filter to the Sale Date field.

Add Filter					
Field					
Sale Date				•	
Filter Type					
after				-	
Cancel	1 2)	N	lext	

On the next step of the wizard we'll change the date to calculated and click the Set Equation button.

Add Filter:	Sale Date		
CHOOSE BY	Calendar Peri	od Date	
DATE	Set I	Equation 🖍	
Cancel	Back	9-9	Done
cancet	Duck	•••	Done

We can build an equation to compare the Sale Date against another date field, but instead we're going match all dates in the past year.

Set Equation	
Sale Date Equation	allowed input: + - */()
subtract(today(), 1, "years")	
Field Choose a field	Add
Cancel	Done

Here's our new filter in action, showing only 6,595 matching records.

ACTIVE FILTERS	+ Add
Sale Date: after subtract(today(), 1, "years")	
Choose a field 👻 🗄 Li	st 6,595
Choose a field to explore or filter!	

Updating Dataset Records

Manually importing

If you've created one or more datasets from a spreadsheet in the Files section, it will list those datasets on the file's Overview tab. Whenever you upload a new revision to that file in the Files section, Impact will automatically update the data in the corresponding datasets.

🛱 Mobileworld	Inc. Example	Physical Fitness Tests Spreadsheet	0 * b ©
PERSONAL	Q Find	Overview	Edit
允 Home 1 ☆ Bookmarks	+ Add File 🗅 New Folder	Physical Fitness Tests Spreadsheet RELATED ITEMS	s + Add
PRESENTATION	Background Images	Physical Fitness Tests Spreadsheet Sep 28, 2021 2:01:35 PM	No related items
Briefings	Spider Impact Logo	Download (30.54 MB)	
Strategy Maps	Physical Fitness Tests Spreadsheet	DATASETS	
Dashboards			
Reports		Drop a New Revision Here	Tests from Files
🕒 Charts		Or click to choose a file	1
FOUNDATION			
Scorecards		REVISIONS	
Initiatives		Apft2018Q4 - fake.csv	
Datasets		Sep 28, 2021 2:01:35 PM	
🗅 Files			
०.‡ ।	~ 등 Expand All 🕜 Edit 🗸		

If a dataset was built by directly uploading a spreadsheet, you can update the dataset by uploading a new version of the spreadsheet on the Dataset Edit tab.

🛱 Mobileworld I	nc. Example <	Device Sales	00
PERSONAL	Q Find	Explore Records	Edit
요 Home 1 ☆ Bookmarks	+ New Dataset 🗅 New Folder	Name Individual Records Track (Plural Noun)	
PRESENTATION	Device Sales	Device Sales Sales	
Briefings	🕅 Fitness Tests	Default App Calendar Field Primary Key Column (From Source Data)	
Strategy Maps	🕅 Customers	None (Show all time) No Primary Key	•
Dashboards	😚 Fakes Sales Data	Allow manually adding new records	
Reports		Defaults for Total Displa	iy .
🕒 Charts			Upload Spreadsheet
		DATASET CONNECTION	
Scorecards		Data Source Info Transformations device sales 20k.csv 1	
✓ Initiatives			
Datasets		FIELDS	+ Add
🕒 Files		NAME DATA TYPE SOURCE EDIT HIDE CATEGORIES & RANGES	
		Customer ID Dataset link to Customers Customer ID	1
۹ 🔹 ۲	°∃ Expand All ✓ Done ◀	G→ Move 🖆 Delete	Cancel Save

You can download a copy of the dataset's most recently uploaded spreadsheet there too.

		Download
DATASET CONNECTION		
Data Source Info 🖍 apft2018q4 - fake.csv	Transformations O	

Scheduled imports

You can schedule imports for datasets that are built from databases, Google Sheets, or (S)FTP spreadsheets. See the <u>Managing Imports and Connections</u> article for more information.

To set or modify an import schedule, you can go to either the Administration > Imports screen or the Datasets Edit tab. Here we're clicking the edit button for a scheduled import.

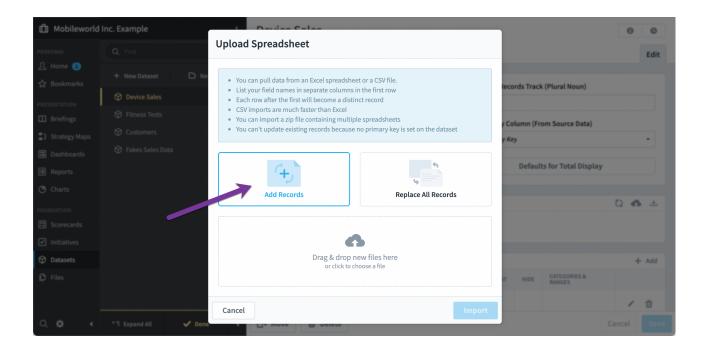
DATASET CONNECTION	<u>ک</u>	0	⊻
Data Source Info zack.ahrensback@spiderstrategies.com > Column Change Import Schedule Add and Update Records: On the First day of every quarter at 7:00PM			

In this example we're importing from Google Sheets on the first day of every quarter at 7:00 PM.

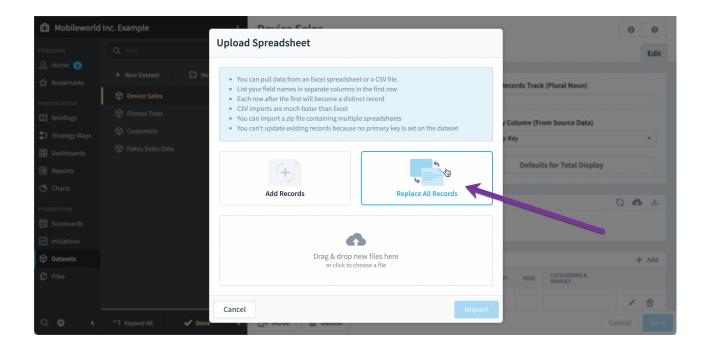
🛱 Zack	cc as hanny nath	0	0
	Import Schedule and Behavior		Edit
	+ New D CHOOSE A TIME TO SCHEDULE	*)	•
	Dacht Schedule Import otal Disp	lay	
 Strategy Maps Dashboards 	EVERY ON THE QUARTER FIRST	0 0) ±
	□ Files ↓ AT □ Speed 7 ▼ 00 ▼ PM ▼ (UTC-06:00) AMERICA/DENVER (2 HOURS EARLIER THAN YOUR TIME ZO ▼		
	D FTP1		
	Report IMPORT BEHAVIOR Initial		- Add
 Datasets 			ŧ
🖆 Forms	Add And Update Records Replace All Records		Û
	Cancel Save	1	1 1 1
	T3 Expand All Done E Delete		

Add records vs. replace all records

The default behavior when importing new dataset data is to keep the existing records and add new ones. If your dataset has a primary key and a new record's key matches an existing record, the old record will be replaced. The "Add Records" option is used when the data you're importing represents transactions rather than all source data.



You can also choose to replace all records, which is used when the data you're importing represents all of the data from the system of record. All existing records will be removed, and all new records will be added. This is actually the most common option, but it does mean you lose your old data, so it's not the default.



If you accidentally add records instead of replacing them, don't worry. You'll notice the problem because you'll have more records than expected. All you need to do is re-import the data and choose "Replace All Records".

It's also important to note that regardless of whether you're adding or replacing all records, any custom changes you've made to data on the Records tab will not be replaced. New records that you've created, and any overrides you've done, will be mixed in with your newly imported data. See the <u>Manually Adding & Updating</u> <u>Records</u> article for more info.

There are multiple ways to get to the import behavior choice. As shown above, you'll see it whenever editing an import's schedule. You'll also see it whenever you manually upload a file. Finally, you'll see it whenever editing the dataset's data source.

DATASET CONNECTION	Edit Data Source	Ł (5
Data Source Info Physical Fitness Tests Spread	sheet 0	

Mobileworld Inc. Example	Eitness Tests from Eiles
Import a Spreadsheet	
£ +	
You can pull data from an Excel spreadsheet or a CSV file.List your field names in separate columns in the first row	
 Each row after the first will become a distinct record CSV imports are much faster than Excel 	
• You can import a zip file containing multiple spreadsheets	
Choose A Source	
Spider Impact file	•
Add And Update Records	Replace All Records
Select A Spreadsheet	
Q Find	Q Find
O SPIDER IMPACT	Background Images
O YOUR TRIAL ENVIRONMENT	Spider Impact Logo
Mobileworld Inc. Example	Physical Fitness Tests Spreadsheet
Cancel	l2 Next
Q S⊋? 4 *5 Expand All ✔ Done 4	L+ Move Delete Cancet Date

Dataset rebuilding

As described in the <u>Creating and Editing Datasets</u> and <u>Dataset Rollup</u>

<u>Trees</u> articles, datasets automatically rebuild whenever you edit one of their fields, or edit a rollup tree that they're using. Datasets also rebuild whenever you update their records or you update the records of any dataset referenced in their calculated fields.

Rebuilding after updating records isn't noticeable because users still see the old data while the dataset is rebuilding. There's just a small notification on the Datasets Explore tab.

Explore	Records			Edit
Updated data	for this dataset	will be available soon. You're still able to view the old data in the meantime.		
ACTIVE FILTER	s	There are no Active Filters	+	Add
Choose a field		✓ ⋮Ξ List	NUMBER OF SALES	÷
	hoose a field t	o explore or filter!		

Dataset KPIs

Creating a dataset KPI

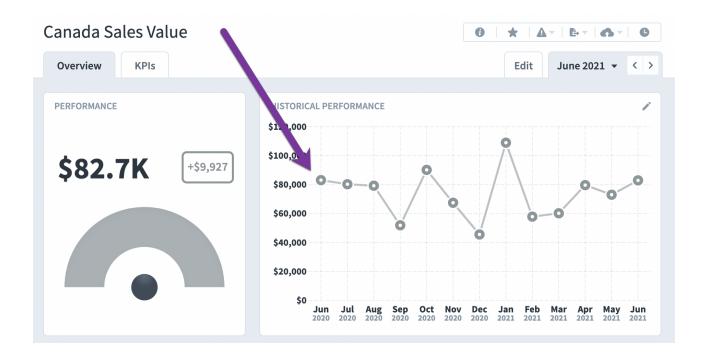
To create a KPI from dataset data, click on any number on the Datasets Explore tab, and then click the "Create Dataset KPI" link. In this example we'll click on the \$3.6M of total Canadian sales.

🛱 Mobileworld	d Inc. Example <	Sales by Country		∂ ★ E . ▼ O
PERSONAL	Q Find	Explore Records		Edit
☆ Bookmarks	+ New Dataset D New Folder	ACTIVE FILTERS		+ Add
PRESENTATION	Device Sales		There are no Active Filters	
🖽 Briefings	E My Test View			
Dashboards	E Sales by Country	Choose a field	•	E List
Reports	Customers			\$28,804,269.46
🕒 Charts	PT Tests	COUNTRY (Customers)		* î
FOUNDATION		COUNTRY	SALE PRICE SUM	SALE PRICE %
Scorecards		United States	\$15.4M	53.34%
✓ Initiatives		United Kingdom	\$6.42M	22.28%
🕅 Datasets		Canada	\$3.63M Create Dataset KPI	12.6%
🖒 Files		Australia	\$3.39M	11.77%
۹ 🗘 ۹	*∃ Expand All 🖍 Edit ◀			

Here you can choose to create a new KPI or add data to an existing KPI. We'll choose to create a new KPI and we'll name it "Canada Sales Value". We'll also choose the Sale Date for the calendar field, and we'll find a good place for the new KPI to go.

D Mobileworld Inc. Example Sales by Country	0 + 1 - 0							
Create Dataset KPI								
A +								
This allows you to create a KPI that pulls its data from a dataset. Normally you'll choose a dataset d over time, immediately after you set it up.	ate field to separate your data by calendar period. That way your KPI will show values that change							
over time, immediately arter you set it up. Another option is to choose Snapshot of Current Data. At first your KPI will only have a value for the current period, but over time your KPI will build up a performance history.								
Create New KPI								
Choose Existing KPI								
Canada Sales Value	Calendar Dataset Field Sale Date							
FOUN	Sale Date							
Choose Parent								
Q Find	Q Find							
SPIDER IMPACT	Mobileworld Balanced Scorecard Financial							
O YOUR TRIAL ENVIRONMENT								
Mobileworld Inc. Example	Increase Revenue Product Revenue							
All Employees	 ✓ Fround Revenue ✓ Training Revenue 							
Key Measures	Revenue							
Financial	Total Revenue							
Marketing	Retail Sales							
Customer Support	⊙ US Sales \$							
T Expand All	°∃ Expand All							
	·							
Cancel	Save							
Q 🐼 ∢ *∃ Expand All 🖌 Edit 🔹								
	Save							

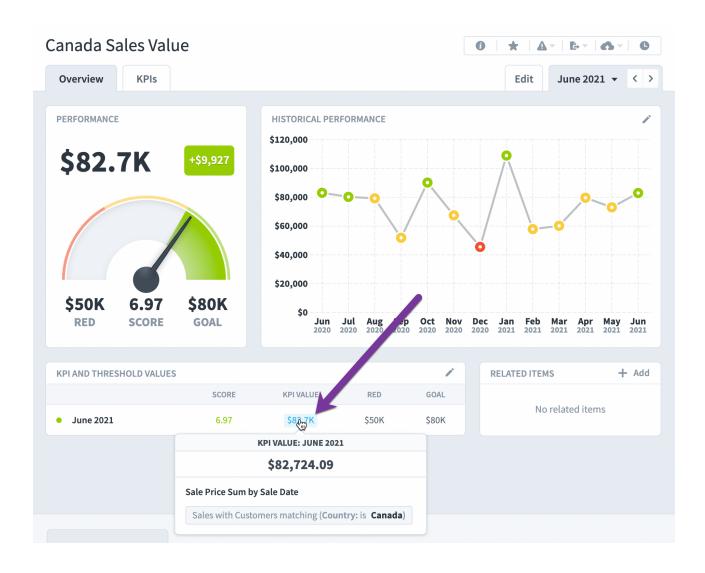
After saving the new KPI, it looks like this. The \$3.6M in total Canada sales has been broken into months using the Sale Date field. In a few clicks we've created a KPI with data going back years. Even better, whenever the dataset is updated with new data, the KPI will automatically update.



This dataset KPI is just like any other KPI, and we can give it thresholds if we want.

FIELDS		Data Type ▼ ☑ Curr Currency ▼ Default	ency -
Scoring Type Calenda Goal/Red Flag Month Aggregation Type Decima + Sum Defaul FIELDS	ly I Precision	✓ Currency	ency •
Goal/Red Flag Month Aggregation Type Function Head State Head	ly I Precision	✓ Currency	ency •
Aggregation Type Decima + Sum • Defaul	l Precision	Currency	
+ Sum			
IELDS	t Decimal Precision	▼ Default	•
KPI Value Red Fla	g	Goal	
😚 Dataset 🔹		- 🗹 Man	ual 👻
Treat missing values as Blank 🔹 50000		\$ 80000	\$
Sale Price Sum by Sale Date <u>View</u>			
Change Existing KPI Updates			

Now our KPI has colors, and we can create performance alerts. When you hover over the KPI value, you can see exactly where the data comes from.



If you click on the KPI value on the Scorecards Overview, you drill down to the Datasets Explore tab for further exploration. Here we have the "Country = Canada" filter automatically applied, with the date set to "June 2021".

🛱 Mobileworld	l Inc. Example <	Device Sales	0 * b * 0
PERSONAL	Q Find	Explore Records Edit	t Sale Date: June 2021 🔹 < >
었 Bookmarks	+ New Dataset 🗅 New Folder	ACTIVE FILTERS	+ Add
PRESENTATION	⑦ Device Sales ₽ My Test View	Sales with Customers matching (Country: is Canada)	•
Dashboards	😫 Sales by Country	Choose a field	SALE PRICE SUM
Reports Charts	♀ Customers♀ PT Tests	1	\$82,724.09
FOUNDATION		Choose a field to explore or filter!	
Scorecards			
InitiativesDatasets			
🗘 Files			

Snapshot dataset KPIs

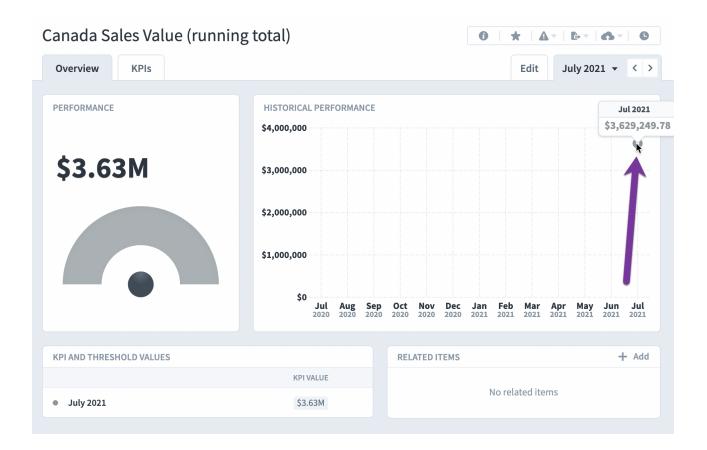
Let's create another dataset KPI.

COUNTRY (Customers)			* 1
COUNTRY	SALE PRICE SUM	SALE PRICE %	
United States	\$15.4M	53.34%	
United Kingdom	\$6.42M	22.28%	
Canada	\$3.63M Create Dataset KPI	12.6%	
Australia	\$3.39M	11.77%	

In the previous example we chose Sale Date for the calendar field, but this time we're not going to choose any date field. Instead, we're going to make a new snapshot KPI.

Ô M	lobileworld Inc. Example <	By country	0 * 5	0
PERSC R F	Create Dataset KPI			ł
☆ E				
PRESE	time, immediately after you set it up.		iield to separate your data by calendar period. That way your KPI will show values that change over rrent period, but over time your KPI will build up a performance history.	
	Create New KPI Choose Existing KPI			
G	Name K		Calendar Dataset Field	
FOUNI	Canada Sales Value (running total)		None: Snapshot of Current Data	
	Calendar Monthly Choose Parent	•	h	
	Q Find		Q Find	
	O SPIDER IMPACT		E Mobileworld Balanced Scorecard	
	O YOUR TRIAL ENVIRONMENT		Financial	
	Mobileworld Inc. Example		Customer	
	Key Measures		Internal Processes	
	Financial		Organizational Capacity	
	Marketing			
	Customer Support			
	Sales			
	* 🗟 Expand All		* ∃ Expand All	
	Cancel		Save	

Rather than spreading the \$3.6M over time, it saves the entire value in the current month of July 2021. Then, at the beginning of the next month, Spider Impact will save whatever the total is at that time for August 2021. Over time the KPI will build a performance history.



Snapshot KPIs are often used when the data source doesn't contain historical data. For example, we may have an HR system that only contains information about our current employees. If we had a "Number of Employees" KPI, we'd create a snapshot that updates based on the total employees in our HR system.

Spider Impact manages all snapshot KPIs for you, but if you're curious, here's how the process works.

Every day, early in the morning, Impact looks to see if a new calendar period started. If so, it will create a new snapshot value. For example, if it's the first day of the month, all monthly KPIs will get new snapshot values. Whenever the dataset is updated with new data, it will also immediately update the current period for all of its dataset KPIs. Finally, when an administrator manually rebuilds the dataset, the snapshot KPI values for the current period are replaced. It's important to note that Impact updates the data in the current period, not the previous period. By default, however, Impact shows the previous period when you log in. That means you'll often have to move one period forward to see the latest snapshot values.

Dataset Permissions

Standard dataset permissions

Standard datasets permissions are the same as permissions in every other section in Spider Impact. Administrators give dataset permissions to a group, and then give that group permission to view organizations. If someone is in a group that can see an organization, they can see its datasets. If someone is in a group with the "Modify Standard Permission Datasets" permission and that group can see the organization, that user will be able to modify all datasets with standard permissions in that organization.

	Administration								
I	PERSONAL	Help Desk & IT Support: Adva	nced	Permissions		Select default Unse	elect all		
	My Profile	O VIEW		E CHARTS AND REPORTS		••• OTHER			
	My Alerts	View All Organizations		Modify Charts and Reports		Modify Scorecard and Initiative Notes			
	USERS & GROUPS	Modify Bookmarks and Personal Settings		Modify SQL Console Reports		Modify Related Items			
	Users	Change Personal Profile							
	Groups & Permissio							ation	
l	Send Broadcast Aler	O UPDATE KPIS		Modify Briefings		Create + Edit Users in Groups They Administer			
	DATA IMPORT & EXPORT	Update All Viewable KPI Values		🕅 datasets		Delete Users in Groups They Administer			
	Shared Dashboards	Update All Viewable Scoring Threshold Values		Modify All Datasets		Log In As Other Users			
	Scheduled Exports			Modify Standard Permission Datasets		Modify View Organization Permissions			
	Imports	Edit Initiatives		Modify Standard Permission Dataset Records		Modify All Scheduled Exports			
	Import Connections	Update Initiative Status		View Standard Permission Dataset Records		Modify All Imports			
	CONFIGURATION	Archive Initiatives		Modify Standard Permission Dataset Views		Modify Import Connections			
I	Calendars								
	Dataset Rollup Tree			SCORECARDS & ORGANIZATIONS		SUPER ADMINISTRATION			
I		Cancel					Done	· · · · · ·	
					_				Ca

When you create a dataset, it defaults to using standard permissions. As you can see on the Datasets Edit tab, "everyone who can see this organization can see this dataset".

🛱 Mobileworl	d Inc. 〈	Device Sales								0	O
PERSONAL	Q Find	Explore Re	cords								Edit
값 Bookmarks	+ New Dataset 🗅 New Folder	NAME	DATA TYPE	SOURCE		EDIT	HIDE	CATEGORIES & RA	NGES		
	🗅 Mobileworld 🗧	Customer ID	Dataset link to Customers	Customer ID						/	Û
Briefings	🗘 Customers	Customer Name	Text	[Customers].[Cu	stomer Name]			no categori	es	-	Û
Dashboards	🗘 Device Sales	Sale Date	Date	Sale Date						/	Û
Reports	🗘 test 🗄	Sale Price	Currency	Sale Price				no ranges		/	Û
🕒 Charts	🗘 Example: Seasonal 🛛 🗄	Sales Department	Text	Sales Department	nt			no categori	es	/	1
	🗘 Example: Trend		/	~ E	xpand						
Scorecards	🕅 Sales 🗄										
Initiatives	😚 Sales2	FIELDS FROM LINKEI								+	- Add
🕅 Datasets	🗅 damis	NAME	I KED DATA	SET	FIELD		DATA TYPE			_	
🕒 Files	😚 DSAID	Customer Country	Customers		Country		Text			Û	
	😚 NFL Combine	PERMISSIONS							lvanced F	ormis	sions
	😚 28 Jun 2021 - 38522 - 1	PERMISSIONS							ivanceu r	errins.	310113
	🕅 Business Mobile Customers	Everyone who can	see this organization can see t	his dataset.							
० 🌣 🖣	ें 🗄 Expand All 🖌 🗸 Done ┥	G→ Move 🛍 D	Delete						Can	cel	Save

Advanced dataset permissions

There are times, however, when you don't want people to see all of a dataset's records. For example, you may want to allow everyone who can see the organization to only be able to see records where the "Restricted" field value is "False". Or you may want to limit a user to only see a subset of the records based on a "Region" field.

For these datasets you can turn on Advanced permissions. When advanced permissions is on, only the users and groups who have been given explicit permission to the dataset can see it.

PERMISSIONS	By User or Group	By Permission Filter	- Advar	nced Permissi	ons
Start Typing					
Default Power Users (Power Users)				ľ	Û
Dale Peterson				1	Û
Spider Impact Administrator					

The users and groups that you add in the Permissions panel will be able to see all records by default, and they will only be able to view data. You can click on the Edit button to change this.

PERMISSIONS	By User or Group	By Permission Filter	Advanced Permissions
Start Typing			
Default Power Users (Power Users)			Edit 💼
Dale Peterson			
Spider Impact Administrator			Ŵ

Here we can give the user any of the permissions in the purple box, and they only apply to this dataset. You can also add a permissions filter by clicking the add button in the permission filters panel.

	Explore Records		-	
+ New Dataset 🗅 New Folder	Permissions for Dale Peterson			
D Mobileworld				no ranges
Customers	PERMISSION FILTERS	+ Add		no categorie
Device Sales	All data in this dataset is viewable.			
🗇 test				
Example: Seasonal	ACTIONS		DATA T	IPE
Example: Trend	Administer		Text	
③ Sales	Modify Permissions			
Gales2	Modify Individual Records		ssion Filter	••• ••• •••
🗅 DAMIS	View Individual Records			
🗘 DSAID				
NFL Combine	Modify Views			
🗘 28 Jun 2021 - 38522 - 1		_		
Business Mobile Customers	Cancel	Done		

We're going to add a filter for Sales Department = "Corporate".

New Folder	Permissions for Dale Peterson	
	PERMISSION FILTERS	+ Add
	Add Filter	
	Field	
	Sales Department	▼
	Filter Type	Add Equation
	is any - Corporate	ission Filter
	Cancel	Done
	Modify Views	
	Cancel	Done
	O Solder Impact Administrator	

When we're done, the dialog looks like this. Dale Peterson can administer the dataset, but he can only see records where sales department is corporate.

	Explore Records		
D New Folder	Permissions for Dale Peterson		
	PERMISSION FILTERS Sales Department: is Corporate	+ Add	
es leasonal	ACTIONS		
	Administer		DATA TYPE Text
	Modify Permissions		-
	Modify Individual Records		uter
	View Individual Records Modify Views		
	Cancel	Done	

When Dale logs in, he'll see a permission filter permanently applied to every screen that shows dataset data.

🛱 Mobilewor	ld Inc. Example <	Device Sales	0 🕇 🗠 🖉
PERSONAL	Q Find	Explore Records	Edit
요 Home ☆ Bookmarks	+ New Dataset 🗅 New Folder	ACTIVE FILTERS	+ Add
PRESENTATION	🗇 Device Sales	PERMISSION FILTERS	
BriefingsDashboards	Device Customers	Dale Peterson Sales Department: is Corporate	
ReportsCharts		Choose a field 🗧 List	NUMBER OF SALES 🔅
FOUNDATION Scorecards Finitiatives		Choose a field to explore or filter!	
Datasets			

Viewing without explicit advanced permissions

There are two notable exceptions to the rule that only users and groups who are explicitly granted access can see advanced permissions datasets.

First is the "Modify All Datasets" permission. This is unchecked by default and allows members of the group to modify all datasets that the group can see, regardless of whether advanced permissions is on.

PERSONAL	Arla	inistration					
<u>़</u> Home 📵	, A	Admin: Advanced Permission	s		Select default Unsel	ect all	
🟠 Bookmarks							
PRESENTATION		O VIEW		E CHARTS AND REPORTS	••• OTHER		
Briefings		View All Organizations		Modify Charts and Reports	Modify Scorecard and Initiative Notes		
Dashboards	US	Modify Bookmarks and Personal Settings		Modify SQL Console Reports	Modify Related Items		•
Reports Charts		Change Personal Profile			ADMINISTRATION A A A A A A A A A A A A		Datasets
O charts		O UPDATE KPIS		Modify Briefings	Create + Edit Users in Groups They Administer		
Scorecards	DA	Update All Viewable KPI Values		🕅 DATASETS	Delete Users in Groups They Administer		
✓ Initiatives		Update All Viewable Scoring Threshold Values		Modify All Datasets	Log In As Other Users		
Datasets				Modify Standard Permission Datasets	Modify View Organization Permissions		Û
Forms		Edit Initiatives		Modify Standard Permission Dataset Records	Modify All Scheduled Exports		
D Files		Update Initiative Status		View Standard Permission Dataset Records	Modify All Imports		Û
	co	Archive Initiatives		Modify Standard Permission Dataset Views	Modify Import Connections		
		FORMS		SCORECARDS & ORGANIZATIONS	ℬ SUPER ADMINISTRATION		
۹.		Cancel				Done	Cancel Save

Second, you can add a user named "Everyone" when advanced permissions is on. This allows anyone who can see the dataset to view its data, and by editing the Everyone user's permissions, you can restrict the records they can see or assign actions that every user can do.

This Everyone group automatically i who can view this dataset's organiza			
	Everyone	1	۵
	Dale Peterson		
	Spider Impact Administrator	/	đ

Auditing dataset permissions

The default view for advanced permissions is "By User or Group". This allows you to see a list of everyone who can view the dataset, and you can edit their permission by clicking on the edit button on the right.

Instead of viewing permissions "by user or group", you can also choose to view permissions "by permission filter". This is helpful when auditing exactly what people can see within the dataset.

PERMISSIONS		Advanced Permissions
	By User or Group By Permission Filter	
Add User, Group, or Rollup Perm	ission Template	
Amanda Wang		/ 1
Dale Peterson		/ 1
Human Resources (Power	Users)	/ 1
Ricardo Lopez		/
Spider Impact Administr	ator	
	∧ Collapse	

The default view is showing users and groups that have any permission filters at all. As you can see, there are two users and one group who have permission filters, which means they can't see all of the dataset records. Just like on the "by user or group" view, you can click on the edit button on the right to see and edit their permission filters.

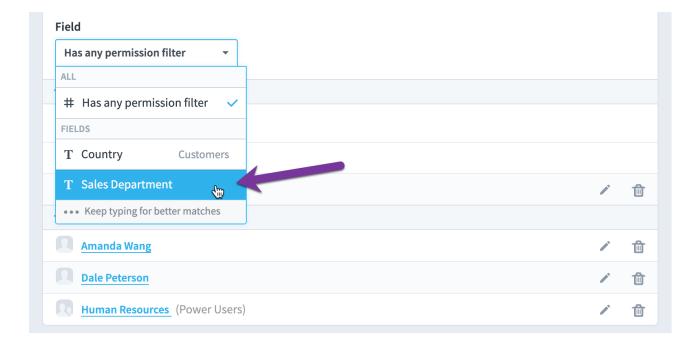
PERMISSIONS	By User or Group	By Permission Filter	1 Adva	nced Permissi	ons
Field Has any permission filter					
> CAN VIEW ALL RECORDS (2)					
✓ DIRECT PERMISSION (3)					
Amanda Wang				<i>I</i> *	٦
Dale Peterson				1	đ
Human Resources (Power Users	5)			-	1

There's also a list of users and groups who can view all records. It's collapsed by default.

PERMISSIONS			Advanced P	ermiss	ions
	By User or Group	By Permission Filter			
Field					
Has any permission filter 🔹			b		
✓ CAN VIEW ALL RECORDS (2)					
Add User or Group					
Spider Impact Administrator					
Ricardo Lopez				-	1
✓ DIRECT PERMISSION (3)					
Amanda Wang				-	1
Dale Peterson				-	1
Human Resources (Power User	s)				1

This gives us a good impression of what's going on. There are two users or groups who can view everything, and there are three users or groups who can view only some records. We can take our permissions audit quite a bit further, though.

If we click the "Field" select, we can see all of the dataset's fields that have a user or group's permission filter applied to them. In this example, "Country" and "Sales Department" are the two fields with permission filters. We'll choose Sales Department.



We now see that Dale Peterson has a "Sales Department is Corporate" permissions filter directly applied to him. We also see the collapsed "view all" section with the same two users who can view all records. That means there are three users in the software who can view corporate sales department records.

PERMISSIONS		Advanced Permissions
	By User or Group By Permission Filter	
Field	Permission Filter	
Sales Department	▼ is Corporate ▼	
> CAN VIEW ALL RECORDS (2)		
✓ DIRECT PERMISSION (1)		
Add User, Group, or Rollup Per	mission Template	

You can also quickly assign other users and groups permission to see Corporate sales records.

Full User	Advanced Permissions
🔍 Ricardo Lopez	Group By Permission Filter
GROUPS	n Filter
Admin (Power Users)	rate
Human Resources (Power Users)	
Interactive Users (Interactive Users)	
I Power Users (Power Users)	
Start Typing	
Dale Peterson	

When we click the "Permission Filter" dropdown we see that users or groups also have permission filters for the sales department being retail.

PERMISSIONS	Advanced Permissions
	By User or Group By Permission Filter
Field	Permission Filter
Sales Department	is Corporate
> CAN VIEW ALL RECORDS (2)	is Corporate 🗸
✓ DIRECT PERMISSION (1)	is Retail
Add User, Group, or Rollup Permiss	n Template
Dale Peterson	 T

By exploring your dataset permissions this way, you can quickly understand who has access to what, and you can ensure that only the correct users have access to sensitive data.

Advanced: Linking Datasets

Creating links

You can unlock powerful insights by linking datasets together. In this example we have two datasets. The first is information about our customers, including their address and points of contact. The primary key is a Customer ID.

Explore Reco	ords					Ed
FIELDS						+ Add
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	
Address	Text	Address			no categories	1
City	Text	• City			no categories	1
Company	Text	Company			no categories	1
Country	Text	Country			no categories	1
County	Text	County			no categories	1
🔎 Customer ID	Text	Customer ID			no categories	<i>I</i> ²
Postal Code	Text	Postal Code			no categories	∕ 俞

The second dataset is information about all of the sales we've had over time. There's a sale date, sale price, and the Customer ID of the organization who made the purchase. In order to link the Customer ID field to the customers dataset, we'll edit the Customer ID field in the device sales dataset.

evice Sales						00
Explore Reco	ords					Edit
FIELDS						+ Add
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	Edit
Customer ID	Text	Customer ID			no categories	1
Sale Date	Date	Sale Date				1
Sale Price	Currency	Sale Price			no ranges	/ 面
Sales Department	Text	Sales Department			no categories	1
Sales Employee	Text	Sales Employee			no categories	1

We'll change the field type from Text to Dataset Link and choose the Device Customers dataset. This tells Spider Impact that the values for this Customer ID field match the primary key values of the Device Customers dataset.

. Example	Edit Field		_	
	Edit Field			
New Dataset 🖸 Ne	Туре	Column (From Source Data)		
	Basic	← Customer ID	-	
	Name			E CATEGORIES &
	Customer ID			
	Field Group			no ra
	Choose or create	a Field Group (optional)	•	
	Data Type			no cate
	Dataset Lini	k	•	no cate
	Linked Dataset		Fil	ter
	Device Custome	rs	1	
	Allow This Fie	eld's Values To Be Overridden		
	Hide From No	on-Administrators		
Expand All 🖌 🖌 Done	Cancel		Done	
Expand All 🗸 🗸 Done				

The Customer ID field is now a dataset link, so we'll save the dataset.

evice Sales						00
Explore Reco	ords					Edit
FIELDS						+ Add
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	
Customer ID	Dataset Link	Customer ID				/ 位
Sale Date	Date	Sale Date				/ 位
Sale Price	Currency	Sale Price			no ranges	/ 位
Sales Department	Text	Sales Department			no categories	1
Sales Employee	Text	Sales Employee			no categories	1
PERMISSIONS		By User or Group	By Permissio	on Filter	I Adva	nced Permissions
Add User, Group, or Ro	ollup Permission Tem	plate				
Dale Peterson						/ 🗇
Spider Impact A	dministrator					

Fields from linked datasets

Our two datasets are now linked together and there is now a "Fields From Linked Datasets" panel on both datasets' Edit tabs. You can click the "Add" button to choose which fields you want to appear from the linked dataset.

evice Sales						0	C
Explore Re	cords						Edit
FIELDS						+	- Add
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES		
Customer ID	Dataset link to Device Customers	Customer ID				/	đ
Sale Date	Date	Sale Date				1	Û
Sale Price	Currency	Sale Price			no ranges		Û
Sales Department	Text	Sales Department			no categories	/	đ
Sales Employee	Text	Sales Employee			no categories	/	đ
FIELDS FROM LINKE		are no fields from linked c	latasets			+	- Add
PERMISSIONS	By Use	r or Group By Permissi	on Filter		Advanced	d Permis	sions

In this example we'll choose to add the Customer Country to the Device Sales dataset.

Add Fields from Linked Datasets	
Linked Dataset	artment
Device Customers -	loyee
Country	
Field Name In This Dataset Customer Country	m linked data:
Cancel	y Permission F

And we'll save the dataset again.

evice Sales								0	C
Explore Re	cords								Edit
FIELDS								-	- Add
NAME	DATA TYPE		SOURCE		EDIT	HIDE	CATEGORIES & RANGES		
Customer ID	Dataset link to D	evice Customers	Customer I)				1	1
Sale Date	Date		Sale Date						Û
Sale Price	Currency		Sale Price				no ranges	-	D
Sales Department	Text		Sales Depar	tment			no categories		đ
Sales Employee	Text		Sales Emplo	oyee			no categories	1	٦
FIELDS FROM LINKE	D DATASETS							-	- Add
NAME		LINKED DATASET		FIELD			DATA TYPE		
Customer Country		Device Custome	rs	Countr	у		Text	1	
Customer State or Pr	ovince	Device Custome	rs	State o	r Province	e	Text	/ 1	<u>ا</u>
→ Move 🔒	Delete	Pulleo	Por Group Dy	Dormiccio	n Eiltor		Advanca	d Dormic ancel	Sav

We are now able to break down our sales totals by Country.

Device Sales	-	0 * b * 0
Explore Records		Edit
ACTIVE FILTERS		+ Add
	There are no Active Filters	
Choose a field	→ !Ξ	List \$28,804,269.46
CUSTOMER COUNTRY (Device Customers)		* 🛍
CUSTOMER COUNTRY	SALE PRICE SUM	SALE PRICE %
United States	\$15.4M	53.34%
United Kingdom	\$6.42M	22.28%
Canada	\$3.63M	12.6%
Australia	\$3.39M	11.77%

Complex linking

Dataset links are bidirectional. Once a link is set up between two datasets, you can set up fields on both sides of the link. In this example the "Fields From Linked Datasets" panel now shows for the Customers dataset too.

Device Cu	ustomers					00
Explore	Records					Edit
FIELDS						+ Add
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	
Address	Text	Address			no categories	1
City	Text	City			no categories	1
Company	Text	Company			no categories	1
Country	Text	Country			no categories	1
County	Text	County			no categories	1
			✓ Expand			
	LINKED DATASETS					+ Add
FIELDS FROM	LINKED DATASETS					T Add
		There are no	fields from l	inked datas	ets	
G→ Move	💼 Delete					Cancel Save

Linking isn't limited to two datasets either. If several datasets are linked together, datasets that aren't directly linked can share fields. You can even build calculated fields using data from multiple linked datasets.

Advanced: Dataset Rollup Trees

Using dataset rollup trees

Dataset rollup trees allow you to track hierarchical data. They're great for companies and governments that have large organization structures, as well as for geographic data (Country > State/Territory > Postal Code).

In this example we have a military fitness test dataset with 333,000 records. We've added the Unit Identification Code (UIC) field to the Explore tab, and we can see that the W4K9AA organization has the most fitness test records in this dataset.

🛍 Mobileworld	Inc. Example <	Fitness T	ests		0 🖈 🕒 🖉
PERSONAL	Q Find	Explore	Records		Edit
요 Home 1 숬 Bookmarks	+ New Dataset 🗅 New Folder	ACTIVE FILTER	RS		+ Add
PRESENTATION	Device Sales			There are no Active Filters	
Briefings	🕅 Fitness Tests				
Strategy Maps	🕅 Customers	Choose a fiel	d	- ↓ 🗄 List	NUMBER OF FITNESS TESTS
Dashboards	🕅 Fakes Sales Data				333,000
Reports		UIC			* 🗊
🕒 Charts		UIC		NUMBER OF FITNESS TESTS	FITNESS TESTS %
		W4K9AA		3,865	1.16%
Scorecards		W8AEFF		2,242	0.67%
Initiatives		W4K8AA		1,882	0.57%
Datasets		W1D5D1		1,654	0.5%
🕒 Files		W4K7AA		1,125	0.34%
		W0Q101		1,054	0.32%
		W1D5C2		849	0.25%
Q 🗱 📢	°∃ Expand All 🖍 Edit ◀	i You haven't s	aved this view		Sav

Militaries are very hierarchical organizations, so we're going to edit the UIC field and turn it into a rollup tree.

🛍 Mobileworld	Inc. Example <	Fitness Te	ests			0	C
PERSONAL	Q Find	Explore	Records				Edit
요 Home 1 숬 Bookmarks	+ New Dataset 🗅 New Folder	RawRun	Text	RawRun	no categories	/ f	Ì
PRESENTATION	Device Sales	RawSU	Number	RawSU	no ranges	1	Ì
Briefings	🕅 Fitness Tests	₽ RecordID	Number	RecordID	no ranges	1	
Strategy Maps	🛇 Customers	ScorePU	Number	ScorePU	no ranges	/ 1	ð
Dashboards	😚 Fakes Sales Data	ScoreRun	Number	ScoreRun	no ranges	/ 1	Ì
Reports		ScoreSU	Number	ScoreSU	no ranges	/ 1	Ì
🕒 Charts		ScoreTotal	Number	ScoreTotal	no ranges	/ 1	đ
FOUNDATION		Sex	Text	Sex	no categories	Edit	Ì
Scorecards		UIC	Text		no categories	6 1	ð
Initiatives				^ Colla	apse		
😚 Datasets						,	
🕒 Files		PERMISSIONS			Advance	ed Permissi	ons
		Everyone wh	io can see this organ	ization can see this dataset.			
ର 🌣 🖪	* Ξ Expand All ✓ Done ◀	G→ Move	💼 Delete			Cancel	Save

We change the data type from Text to Rollup, and then choose which rollup tree we want. Rollup trees are build and managed in the Administration section, and we'll cover how to do that next. In this example we're choosing Chain of Command.

nc. Example	Fitness Tests	
	Edit Field	
+ New Dataset	Type Column (From Source Data)	no categories
	Basic - UIC -	no ranges
	Name	no ranges
	UIC	no ranges
💮 Fakes Sale. 🤉 sta	Field Group	no ranges
	Choose or create a Field Group (optional)	no ranges
	Data Type	no ranges
	윦융 Rollup ~	no categories
	Rollup Tree Chain of Command	no categories
	Allow This Field's Values To Be Overridden	_
	Show Rollup Tree Keys Along With Name	Advanced Per
	Hide From Non-Administrators	
	Cancel	
ି ଲ Expand All 🖌 🖌 D	one G+ Move 🔒 Delete	Cance

Now when you add the UIC field to the Explore tab, you see a tree instead of a list of UIC. That's because Impact has matched the UICs to items in the Chain of Command rollup tree and is now able to show you aggregated totals. And, just like every other field type, you can click on an item in the tree to drill down.

UIC					⇔	Û
UIC		NUMBER OF FITNESS TESTS		FITNESS TESTS %		
U.S. Army		321K		96.47%		
Dept of the Army		238K		71.33%		
U.S. States and Territe	ories	83.7K		25.15%		
Blank		11.7K		3.53%		
GENDER					\$	Û
GENDER	NUMBER OF FITNESS TESTS		FITNESS TE	ESTS %		
М	277K		83.22%			
F	55.9K		16.78%			

At the top of the UIC panel it now shows the tree level that we've drilled down to, as well as a back button that will take us to where we were before. As you navigate up and down the tree, Impact automatically applies filters to restrict records to only that tree level. In this example you can see the Gender panel updating with new numbers as we go down the tree.

UIC < Back is Dept of	of the Army and all descendants		* 1
UIC	K	NUMBER OF FITNESS TESTS	FITNESS TESTS %
Dept of the Army		238K	100%
US Army Comn	nands (WARCFF)	235K	99.06%
Headquarters [Department of the Army (W0ZUFF)	1,557	0.66%
Office of the Se	cretary of the Army Controlled Activities	674	0.28%
GENDER			÷ 1
GENDER	NUMBER OF FITNESS TESTS	FITNESS TESTS %	ó
М	196K	82.49%	
F	41.6K	17.51%	

Here we've drilled down to a third tree level. Most rollup trees are fairly small, but Impact has been tested to perform well with trees as large as 50,000 items.

UIC < Back is US A	Army Commands (WARCFF) and all descendants			\$	1
UIC		NUMBER O	F FITNESS TESTS	FITNESS TEST	S %
US Army Comman	nds (WARCFF)	235K		100%	
United States	s Army Reserve Command (W47AFF)	83.9K		35.65%	
United States	s Army Forces Command (W3YBFF)	74.2K		31.52%	
United States	Army Training and Doctrine Command (W3YTFF)	32.2K		13.67%	
United States	s Army Pacific (WJMZFF)	21.1K		8.95%	
Other (Show 5 Mo	re)	24K		10.2%	
GENDER				¢	÷ 🗇
GENDER	NUMBER OF FITNESS TESTS		FITNESS TESTS %		
Μ	194К		82.53%		
F	41.1K		17.47%		

Managing dataset rollup trees

You can build and manage dataset rollup trees in the "Dataset Rollup Tree" page in Administration. On the left is the rollup tree that you choose in the dropdown above, and on the right, you can edit the keys for the selected tree item. In this example, any time a field's value is "WDARFF", it will match with the "Dept of the Army" item in the rollup tree.

PERSONAL	CONFIGURATION		
री Home 1	Calendars	DATASET ROLLUP TREES	Keys Permissions
☆ Bookmarks	Dataset Rollup Trees	Chain of Command - Manage Rollup Trees	✓ DEFAULT KEY SET (1)
PRESENTATION	Application Administration	Q Find	Keys
Briefings	Server Administration	U.S. Army (U.S. Army)	WDARFF
Strategy Maps	Spider Impact Databases	U.S. States and Territories (U.S. States and Territories)	
Dashboards	License Management	Dept of the Army (WDARFF)	+ Add Key Set
Reports Charts	MONITORING	Office of the Secretary of the Army Controlled Activity	
-	Diagnostics	 Headquarters Department of the Army (W0ZUFF) (WC 	•
FOUNDATION Scorecards	Current User Activity	 US Army Commands (WARCFF) (WARCFF) 	
✓ Initiatives	View Log Files		
Datasets	Background Process Status		
🖒 Files	ADVANCED		
	Mass Edit Scorecard Items		
	Recalculate All Scores	~ ີ∃ Expand All 🖉 Edit	
	Tree Eiver		
ର 🌣 🖪	•		Cancel Save

It's most common for every item in the rollup tree to have a single key. Sometimes, however, tree items will have no key at all and will instead be used only for showing aggregated data from its descendants. Other times a rollup tree item will have multiple keys.

Because rollup trees are used across multiple datasets, each dataset may have a different way to reference the tree items. To support this, Impact allows you to create multiple keysets. For example, one keyset may be "By Payroll ID" and another keyset may be "By Human Resources ID". When a rollup tree has multiple keysets, you'll also need to choose which keyset to use when setting up a rollup tree field in your dataset. Keysets are important because different datasets can use the same key to refer to different items.

Keyset Name	
Keys	
> BY NAME (1)	
	By UIC Keys 4952353 FORSCOM C Copy Delete By NAME (1) Add Keyset

Just like other places in Impact, you can put the rollup tree in edit mode.



This allows you to drag and drop items to reorder the tree, and the selected item has a tooltip menu on it for modifying tree items.



To change the rollup tree that you're editing, select the tree you want in the dropdown in the upper left.

Chain of Command	 Manage Rollup Trees
Q Find	
Q min	
 Mobileworld Inc. 	

Next to that is the Manage Rollup Trees button.

Chain of Command	 Manage Rollup Tre
O Find	
Q	
 Mobileworld Inc. 	

This opens a dialog where you can create, rename, reorder, delete, update, and download rollup trees.

	+	Add
⊻	6	∄≡
⊻	6	∄ ≡
		*

Dataset rebuilding

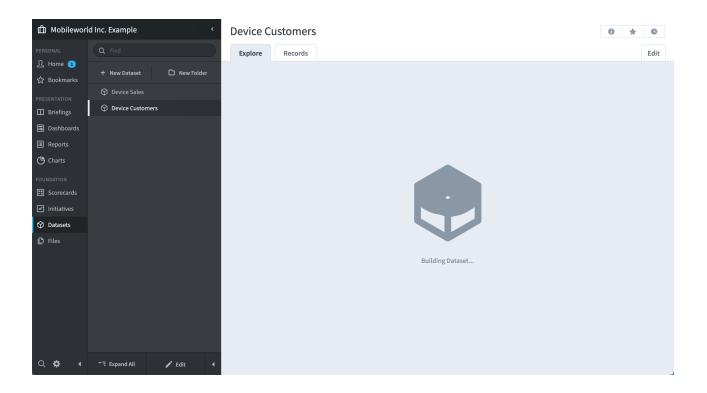
As described in the <u>Creating and Editing Datasets</u> and <u>Updating Dataset Records</u> articles, datasets automatically rebuild whenever you edit a field or update their records. Most of this rebuilding isn't noticeable because users still see the old data while the dataset is rebuilding. There's just a small notification on the Datasets Explore tab.

Explore	Records					Edit
Updated data) for this dataset will b	be available soon. You're still able	e to view the old data in the n	neantime.		
ACTIVE FILTER	s	There	are no Active Filters		+	Add
Choose a field	1				NUMBER OF SALES	¢
\mathbf{r}	Choose a field to exp	plore or filter!				

This is exactly the same thing that happens when you add or delete items in a dataset rollup tree. Any dataset using that rollup tree will be transparently rebuilt behind the scenes while people continue to see the old data until the new data is ready. Similarly, renaming a rollup tree item doesn't cause anything to rebuild.

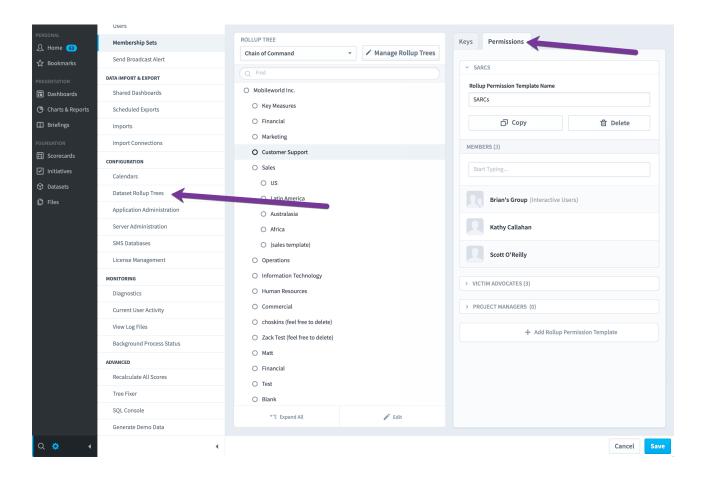
There are more invasive changes you can make to a dataset rollup tree that cause all datasets using it to not only be rebuilt, but also to become unusable until the rebuilding finishes. These changes are:

- Moving a dataset rollup tree item
- Changing a dataset rollup tree item's key(s)
- Reimporting a dataset rollup tree



Dataset rollup permission templates

The other tab on the Admin > Dataset Rollup Trees page is Permissions. This is for creating Rollup Permission Templates, which can dramatically simplify the management of tree-based dataset permissions.



Each collapsible box on the Permissions tab is a rollup permission template. In this example we have created a rollup permission template for each of three different types of users: SARCs, Victim Advocates, and Project Managers. When you click on a rollup tree item on the left, you can assign users and groups to the different rollup permission templates on the right.

✓ SARCS
Rollup Permission Template Name
SARCs
ට Copy 🛍 Delete
MEMBERS (3)
Start Typing
Brian's Group (Interactive Users)
Kathy Callahan
Scott O'Reilly
> VICTIM ADVOCATES (3)

The most important thing to realize here is that a rollup permission template applies to an entire rollup tree. So, every rollup tree will have different rollup permission templates, but you'll see the same rollup permission templates as you're clicking on different items in a rollup tree. The only things that will change between items are the users and groups that are inside of each rollup permission template for the selected item.

In this example we're going to click through the various items in the UIC rollup tree and assign users and groups to the SARCs, PMs, and VAs permission templates. Once that's done, we can use these permission templates to quickly assign permissions to datasets. All you need to do is turn on advanced permissions for a dataset and then add your permission template like you would a user or a group. In this example there are two fields that use the UIC rollup tree, so there are two versions of each rollup template that we can choose from.

Ex 뮮 Subject1 UIC: Project Managers		
器 Subject1 UIC: SARCs	Was Victim in Military at Time of Assa	✓ m
器 Subject1 UIC: Victim Advocates	ult?	
Updaters (Update Users)	Weapon Used?	no categories 🖍 🕅
器 Victim UIC: Project Managers	Were drugs involved? (Subject/Victi m)	no categories 🖍 💼
器 Victim UIC: SARCs	∧ Collapse	
品 Victim UIC: Victim Advocates		
Viewer Only (Interactive Users)	By User or Group By Permission Filter	Advanced Permissions
Zack Ryan		
Start Typing		
Spider Impact Administrator		

By adding the "Victim UIC: SARCs" to the dataset, every member of the SARCs permission template can now see records where the Victim UIC is in that SARC's UIC or below. You can edit this permission, just like you can with users or groups.

PERMISSIONS	By User or Group By Permission Filter	Advanced Permissions
Start Typing		
器 <u>Victim UIC: SARCs</u>		/ 🛍
Spider Impact Administrator		

The only difference is that a permission template has a filter that can't be removed. This permanent filter shows that SARCs can see their rollup tree item and descendants for the Victim UIC field.

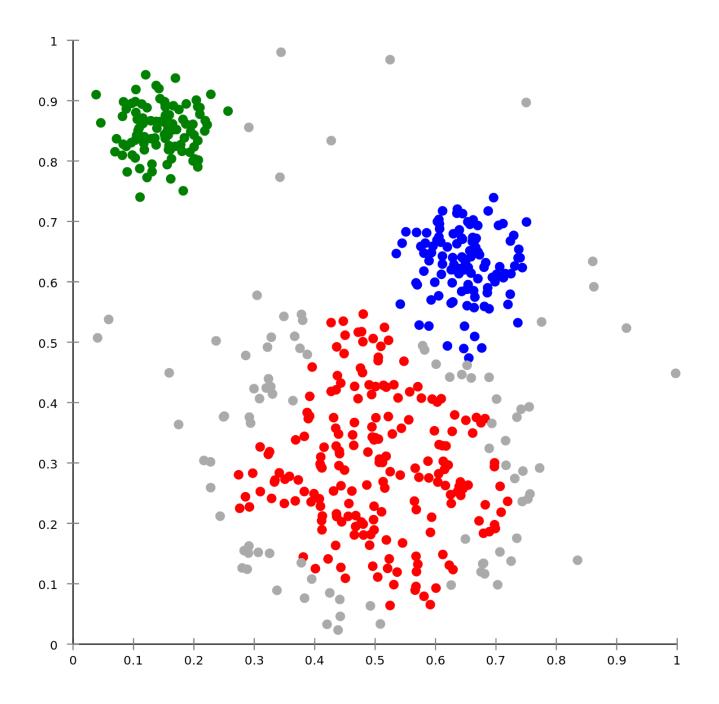
rw Dataset	New Folder		
		Permissions: Victim UIC: SARCs	
		PERMISSION FILTERS	+ Add
		Victim UIC: is Rollup Tree Item, and all descendants	
		ACTIONS	
		Administer	
		Modify Permissions	
		Modify Records	
		View Records	
		Modify Views	
	olate	Cancel	Done

You can always add additional filters, though. For example, we could add a new filter that also limits access to only fields with a "Restricted" value of "False".

Advanced: Clustering Analytics

With Datasets, Spider Impact can explore large amounts of unstructured data. With data clustering, you can unlock powerful insights by analyzing the relationships between your datasets' multiple fields. Clustering creates profiles in your data, helping you to understand the types of records most likely to show up in your dataset.

Clustering is best explained by example. Let's imagine that we have a dataset of customers, and we want to discover the types of people who buy our products. Each point on the scatter plots below represents a customer. Let's imagine that the X axis is age, and the Y axis is income.



We can see that the clustering algorithm has found three clusters in the data. The three demographics of people who buy this product are young high-income people, middle-aged low-income people, and older middle-income people.

Looking at two dataset fields is interesting, but now let's imagine extending these scatter plots into a 3rd dimension by adding a Z axis. In addition to tracking age and income, let's say that we're also tracking years of formal education. By seeing points in 3-dimensional space, we could find even more interesting clusters of people. We could discover that our product is often purchased by older, higherincome people with little formal education, or middle-aged, low-income people with graduate degrees.

The human mind has trouble imagining data in more than 3 dimensions, but clustering algorithms do not. The more dimensions of data that you're able to provide to Impact, the more powerful it becomes. Your datasets have dozens of fields, and there are meaningful insights to be discovered.

To create a clustering field in your dataset, click the "Add" button in the Fields table on the Edit tab.

Explore Reco	rds					Edi
FIELDS						+ Add
NAME	DATA TYPE	SOURCE	EDIT	HIDE	CATEGORIES & RANGES	
Customer ID	Dataset link to Customers	Customer ID				1
Sale Date	Date	Sale Date				1
Sale Price	Currency	Sale Price			4 ranges	1
Sales Department	Text	Sales Department			no categories	1
Sales Employee	Text	Sales Employee			no categories	1

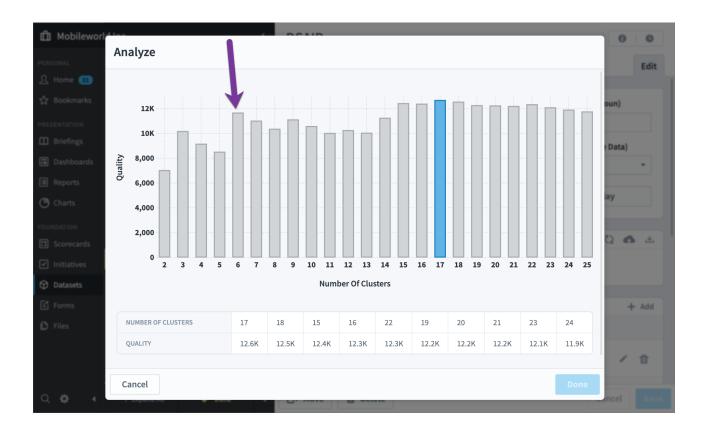
Then choose Data Clusters from the field type.

	Add Field				
D New Folder					
	Туре	Equation		EDIT	HIDE
	Calculated	Set Equation	/		
	🖬 Calculated 🗸				
	Basic				
	🔆 Data Clusters				
	Choose or create a Field Gro	oup (optional)	•		
	Data Type				
	T Text		•		
	Allow This Field's Value	es To Be Overridden			
	Hide From Non-Admini	strators			Te
					Te
	Cancel		Done		
	PERMISSIONS				

Next, choose which fields you want to cluster on and click the Analyze button.

🛱 Mobileworld In	c. SAID	0 0
A Home 3	Add Field	Edit
🛠 Bookmarks		
Briefings	Type Clustering Fields	ral Noun)
Dashboards	🔆 Data Clusters 👻 Subject 1 Age at the Time of Incident Age at the Time of Incident Grade	
Reports	Number Of Clusters	ource Data)
Charts	Auto	•
💷 Scorecards	Name	
 Initiatives 	Cluster Test 1	Display
⑦ Datasets	Field Group	
🖺 Forms	Choose or create a Field Group (optional)	0.0.2
D Files	Allow This Field's Values To Be Overridden	
	✓ Hide From Non-Administrators	+ Add
	Cancel Next	5
् 🔅 🔺 👻	Expand All Vone C+ Move	

This opens a second-level dialog showing the quality of various numbers of clusters. You can see here that 17 clusters is the best fit for our data, but that 6 clusters is almost as good.



In this situation we want to go with 6 clusters to keep things simple, so we'll tell Impact that we want 6 clusters instead of "Auto".

ည္ Home 💷		lew Dataset	New Folder							
			L New Polder					al Noun)	
	D	Add Field								
		Туре		Clustering Fields				urce Da	ta)	
		送 Data Cluste	ers 👻	Subject1 Age at the T	ime of Incident	Age at the Time of Incident	Grade			-
		Number Of Clus	ters							
🕒 Charts	Ŷ	6	-	Analyze				Display	y	
FOUNDATION		Name								
🗄 Scorece .		Cluster Test 1							0 6	*
	8	Field Group								
	~		e a Field Group (option	nal)			•			
	8	Allow This F	ield's Values To Be Ove	orriddon					+	Add
D Files	8		lon-Administrators	ennuuen				IES &		
	8		ion-Administrators					gorie	1	Û
		Cancel			2		Next			-
				case to	Number	La case to	101	ariges	1	會
				City (Off Military	Text	City (Off Military In	no ca	tegorie	1	\$

Finally, we'll give each cluster a name based on its characteristics for each of the fields we've chosen.

CLUSTER NAME	NUMBER OF RECORDS	SUBJECT1 AGE AT THE TIME OF INCIDENT CENTER	VICTIM AGE AT THE TIME OF INCIDENT CENTER	VICTIM GRADE CENTER
Academy	4339	43	18	5
Cluster 2	2028	43	43	5
Cluster 3	9131	43	28	5
Cluster 4	1374	43	29	6
Senior Staff	824	43	65	6
Invalid Data	439	43	-18	5

We can now use our new data clusters field just like we would any other dataset field. The cluster that a record falls into is the cluster field's value. In this example

we've added the field to the Datasets Explore tab, but you can also use it in Reports, Charts, and Dashboards.

CLUSTER TEST 1		* 1
CLUSTER TEST 1	NUMBER OF INCIDENTS	INCIDENT %
Young Recruits	1,992	41%
Academy	1,799	37%
Senior Staff	566	11.7%
Ready to Retire	279	5.7%
Promotable	217	4.5%
Other	5	0.1%
RELATIONSHIP TO SUBJECT		* 1
RELATIONSHIP TO SUBJECT	NUMBER OF ASSAULTS	ASSAULTS %
Acquaintance	4,858	100%

Spider Impact uses the <u>k-means++ algorithm</u> for clustering, and each cluster's quality is evaluated using the Calinski Harabasz index.

Advanced: Manually Adding & Updating Records

Datasets are mostly about visualizing and exploring aggregated data. For users with the correct permissions, however, it can also be helpful to view the details of individual records. That's what's covered in this section.

There are also special circumstances when you'll want to override dataset values that you've imported, or create entirely new records that don't exist in your data source. It's almost always better to change the data at the source, so overriding values in Impact should only be used when that's not possible.

The Records tab

On the Datasets Explore tab, we've applied an "Age is less than 18" filter and there are 331 matching results.

Explore Records	Edi
ACTIVE FILTERS	+ Add
Age: less than 18	
Choose a field	→ E List NU SER OF TESTS 331
Chaosa a field to evolute or filter!	

With the correct permissions, I can click to the Records tab to see the raw data.

Explore	Recor	rds							E	dit
ACTIVE FI	LTERS	K							+ A	dd
Age: le	ss than 18									
RECORDS	; (331)									
AGE	ALTERNATE EVENT GO?	ALTERNATE EVENT NAME	ALTERNATE EVENT?	BCT SCORING?	CHAIN OF COMMAND	EXEMPT FROM PUSH- UPS?	EXEMPT FROM SIT- UPS?	FOR RECORD?	GENDER	PASS TEST
17			No	No		No	No	Yes	М	No
17			No	Yes		No	No	No	М	No
17			No	No	Headquarters and Headquarters Detachment 484th	No	No	Yes	F	Yes

Editing record values

By default, records' values can't be changed in datasets. When editing a field, however, you can allow values to be overridden on the records tab.

Exempt from Push-uns? Yes/No	
Edit Field	
Name	
Age	no categories
Field Group	
Demographics	
Data Type	no ranges
# Number	
Default Aggregation Type	5 ranges
+ Sum -	no categories
Decimal Precision	
Default	no ranges
Allow this field's values to be updated on the Records tab	no categories
Hide from non-administrators	no ranges
Cancel 1 2 3 Next	no ranges

When one or more fields are editable and you have the correct permissions, you can click on a record.

Explore	Recor	rds							Ed	it
ACTIVE FI	LTERS								+ Add	1
				There are r	no Active Filters					
RECORDS	(1,000 OF 333,0	00)								
AGE	ALTERNATE EVENT GO?	ALTERNATE EVENT NAME	ALTERNATE EVENT?	BCT SCORING?	CHAIN OF COMMAND	EXEMPT FROM PUSH- UPS?	EXEMPT FROM SIT- UPS?	FOR RECORD?	GENDER	
25			No	No	CIVIL AFFAIRS COMPANY, CIVIL AFFAIRS BATTALION	No	No	Yes	М	
26			No	No		No	No	No	F	
28	Yes	2.5 MILE WALK	Yes	No		No	No	Yes	М	

This shows a dialog where you can override record values. Datasets will remember the values you enter, even after new data is imported into your dataset.

Edit Record	
Age	EDITED UNDO
99	
Gender	UNDO
F	•
Cancel Undo All Edits	Save
	No No

Explore	Recor	rds							Ec	dit
ACTIVE FIL	TERS								+ Ad	ld
				There are r	no Active Filters					
RECORDS	(1,000 OF 333,0	000)								
ed Fields Gender	ALTERNATE EVENT GO?	ALTERNATE EVENT NAME	ALTERNATE EVENT?	BCT SCORING?	CHAIN OF COMMAND	EXEMPT FROM PUSH- UPS?	EXEMPT FROM SIT- UPS?	FOR RECORD?	GENDER	ID
99			No	No		No	No	No	М	1
25			No	No	CIVIL AFFAIRS COMPANY, CIVIL	No	No	Yes	М	10(

Note that you can only make a field editable when you have a primary key defined for your dataset. That's because the software needs to be able to uniquely identify the record that is being changed so that the same change will be made after you import data again later.

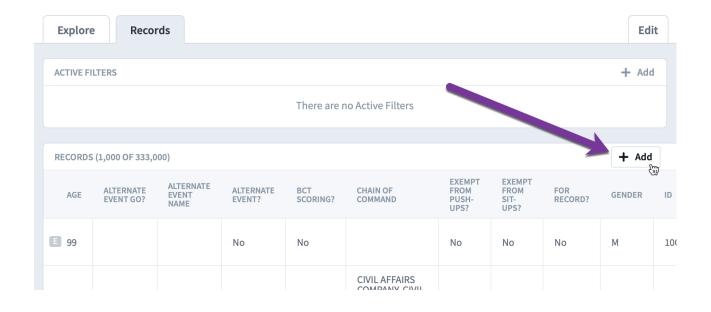
Name	What Does The Dataset Tr	ack?
Fitness Tests	Tests	
Default App Calendar Field	Primary Key (From Source	e Data)
None (Show all time)	✓ ID	•

Adding new records

When editing a dataset, you can allow entirely new records to be added.

Name	What Does The Dataset Track?	
Fitness Tests	Tests	
Default App C endar Field	Primary Key (From Source Data)	
Non'e for low all time)	▼ ID	-

When enabled, there is an Add button on the Records tab.



PERSONAL	Q Find	Add Record				9 *	B 0	
요 Home ☆ Bookmarks							Edi	t
PRESENTATION		Age					+ Add	
Dashboards		Age					1 100	
🕑 Charts & Reports		Alternate Event Go?						
Briefings		Alternate Event Name					+ Add	
FOUNDATION		v		EXEMPT	EXEMPT			
🗄 Scorecards		Alternate Event?		PUSH- UPS?	SIT- UPS7	FOR RECORD?	GENDER	ID
✓ Initiatives		· · · · · · · · · · · · · · · · · · ·		No	No	No	м	
Datasets		BCT Scoring?						
D Files		· · · · · · · · · · · · · · · · · · ·	S VIL	No	No	Yes	м	100
		Chain Of Command						
		සි Clear		No	No	Yes	м	100
		Exempt From Push-Ups?		No	No	Yes	F	100
0.¢ ∢		Cancel		No	No	Yes	м	100

Just like editing records, added records will be preserved even after future data is imported into the dataset.

🗅 New Folder	Explore Rec	ords								Edi	it
;											
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	ID: is 123										
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New Record This record was cr	reated on the Records tab	ALTERNATE EVENT NAME	ALTERNATE EVENT?	BCT SCORING?	CHAIN OF COMMAND	EXEMPT FROM PUSH- UPS?	EXEMPT FROM SIT- UPS?	FOR RECORD?	GENDER	ID	P/ TE
	19									1	۵

Other

Overview of Initiatives

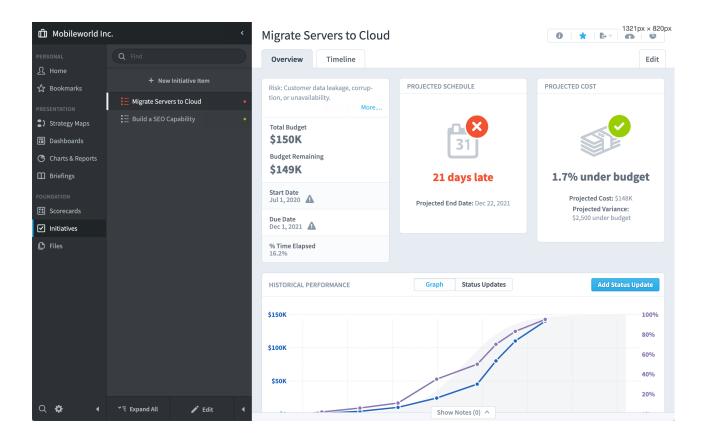
The Basics

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.



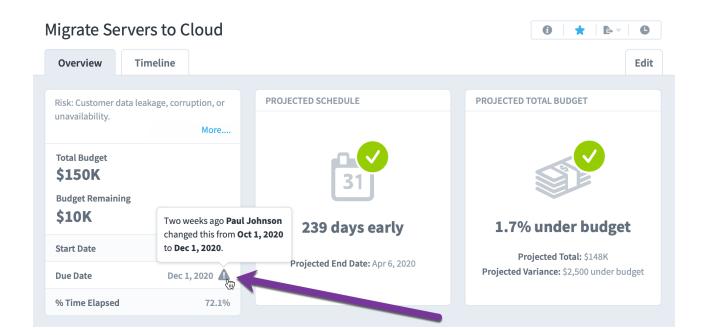
Predicting Budget and Schedule

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



Changes to Key Numbers

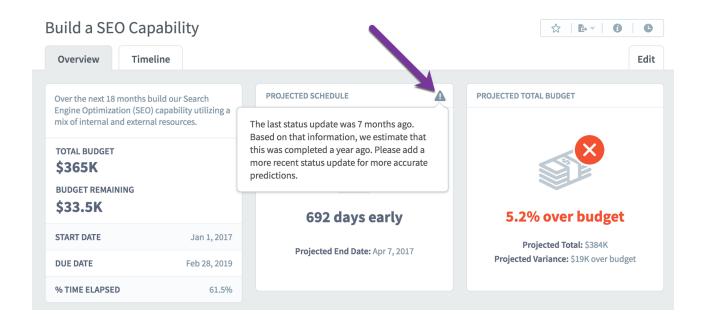
In an effort to promote transparency, whenever an initiatives's start or end date is edited, that information is displayed next to the new value on the overview tab.



Projected End Dates in the Past

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

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



Timeline Tab

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

× 1	Migrate Servers to Clo	oud						0 *	e v O
ম	Overview Timeline								Edit
☆									
:2	Q Find	1, 2018	Oct 1, 2018	Jan 1, 2019	Apr 1, 2019	Jul 1, 2019	Oct 1, 2019	Jan 1, 2020	Mar 30, 2020
	Migrate Servers to Cloud	•					95%		
٩	$\vee \ \mathop{\stackrel{\scriptstyle{\leftarrow}}{\scriptscriptstyle{\equiv}}}$ Build a SEO Capability	•						76%	
ш П	Research project and write a re	•			100%				
	 Status Update to Board 							\diamond	
	Oevelop a web marketing team	•						75%	
^ل م									
⇔ ►	>∃ 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.

^۲ ش	Migrate Servers to Cloud					0 * •	C
오 ☆	Overview Timeline						Edit
:>	Q Find	Jan 1, 2019	Feb 1, 2019	Mar 1, 2019	Apr 1, 2019	May 1, 2019	Ju
	Migrate Servers to Cloud						
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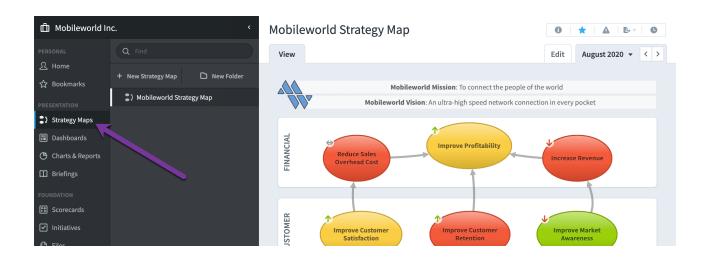
If you click on any of the initiative items in the Gantt chart, you can see detailed information about that item, like its description and the projected budget and schedule performance.

^۲ (Migrate Servers to Cloud	1						0 † Þ	C
ୁ ☆	Overview Timeline								Edit
:2	Q Find	ıl 1, 2018	Oct 1, 2018	Ja	n 1, 2019	Apr 1, 2019	Jul 1, 2019	Oct 1, 2019	Jan 1
	⋮ _ Migrate Servers to Cloud	•				کن		95%	
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ш —	Research project and write a re	•		Diele Contenue	and the local second second				
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C				BROJEC 31 21 days	TED SCHEDULE		TED TOTAL BUDGET Ider budget		
				Overview			Add Status Update	I	
Q									
\$	>∃ Collapse All							(>)	
	= collapse All	Ŷ						•	

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.



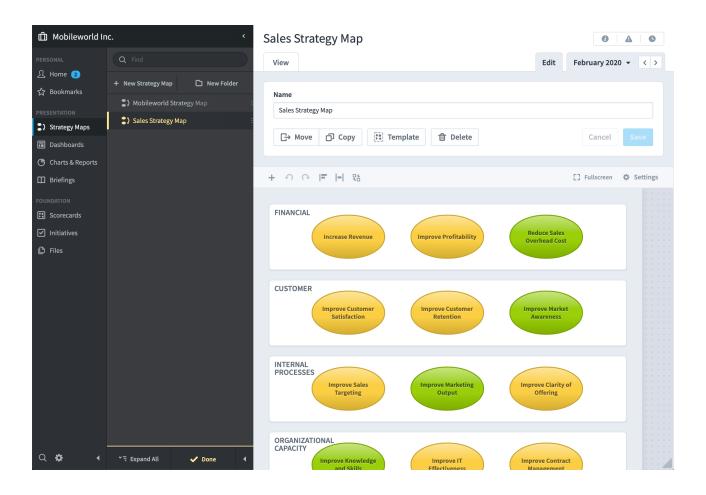
If you don't use the Balanced Scorecard methodology, there's a good change that you'll want to disable strategy maps. We explain how to do that in the <u>Choosing</u> <u>Methodology</u> article.

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

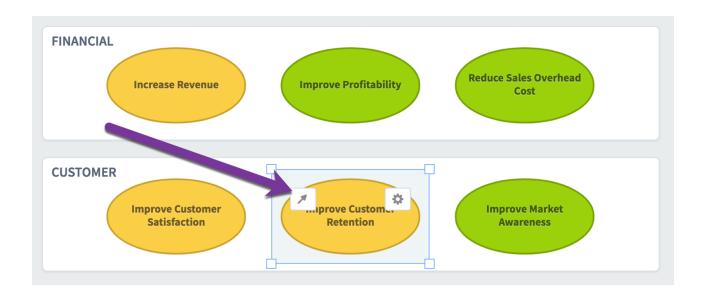
Adding new widgets is exactly the same as in Dashboards too. Just click the *Add Widget* button and choose an Objective or Perspective from the Scorecards section.

+ • • F			
	Add Wie	dget	
		-	
Image	Text	Objective	Perspective

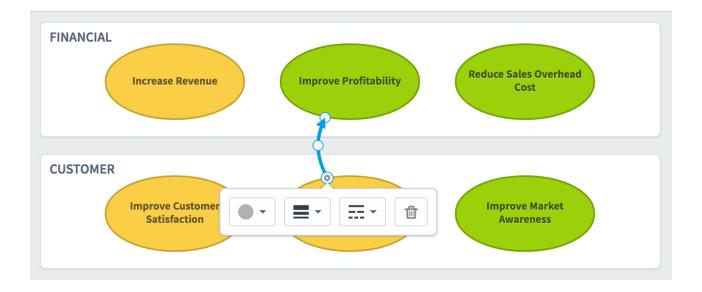
You can also add <u>images widgets</u> and <u>text widgets</u>, which are the same as on dashboards.

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		
요 Home 3		ALERTS	Edit Subscriptions
	Welcome	This screen is your alerts inbox that keeps you up to date on how everything is going.	
☆ Bookmarks	Alerts 3	une en en la jara del como andrine de la concernante de la muelle Benië.	
PRESENTATION	KPI Updates	3 NEW ALERTS	✓ Mark all as read
Strategy Maps	My KPIs	Financial	4 months ago
Dashboards		O Total Gross Profit	
🕒 Charts & Reports	My Tasks	Score is now 3 for November 2019.	
Briefings		Financial O Total Gross Profit	9 months ago
FOUNDATION		Score is now 3 for May 2019.	
Scorecards		Financial	9 months ago
✓ Initiatives	•	Total Gross Profit Score is now 3 for November 2019.	
🕒 Files			A Charachistana
		ALERT HISTORY	Clear history
		No Alerts in History	
० 🌣 🖪	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.

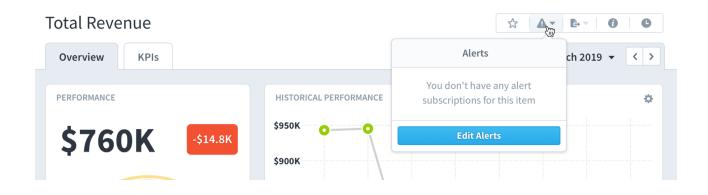
ይ Home 1	Import Connections	ALERTS
숬 Bookmarks	Scheduled Exports	Red KPIs Without Tasks
Strategy Maps	Shared Dashboards	
Dashboards		
🕒 Charts & Reports	CONFIGURATION	Note Replied To
Briefings	Calendars	2 No -
Scorecards	Dataset Rollup Trees	Red KPIs Upon Turning Red
Initiatives	Application Administration	3 No -
🗅 Files	Server Administration	KPI Update Reminders (Multiple Allowed)
	Spider Impact Databases	4 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	5 No -
	Diagnostics	E-Mail Size Limit (MB)
	Current User Activity	6
	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.

	365UK		
irainii Sook I	Total Revenue		
fotal (Jumb	MY ALERT SUBSCRIPTIONS	+ Add	
lvera	You don't have any alert subscriptions for this item	Add Alert	Dec 2018
rove i		Score change	
let O	Cancel	KPI value change	RE
6 Net	les Overhead Cost	Notes added	
ace 38			

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	EMAIL PREFERENCES		
25	PERSONAL			
:	My Profile	Send me email notification	s Immediately •	
•	My Alerts	MY ALERT SUBSCRIPTIONS		+ Add
С Ш	USERS & GROUPS	ITEM	RULE	ACTIONS
	Users	• Product Revenue Financial	KPI value change below or equal to \$400,000	∕ ₪
	Groups & Permissions	Total Gross Profit		
C	Send Broadcast Alert	• Financial	Score change below or equal to 3	/ 🗇
	DATA IMPORT & EXPORT			
	Imports			
	Import Connections			
	Scheduled Exports			
Q	Share-bashboards			
\$ ▲	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.

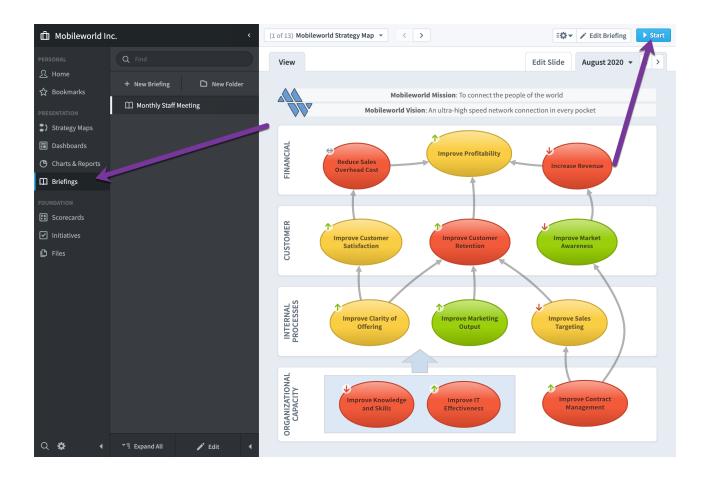
EMAIL PREFERENCES		
Send me email notifications	Every week on • Monday •	
	Never	
MY ALERT SUBSCRIPTIONS	Immediately	+ Add
ITEM	Every night	ACTIONS
• Product Revenue Financial	Every week on 🗸 qual to \$400,000	1
• Total Gross Profit Financial	Score change below or equal to 3	/ 🗊

Briefings

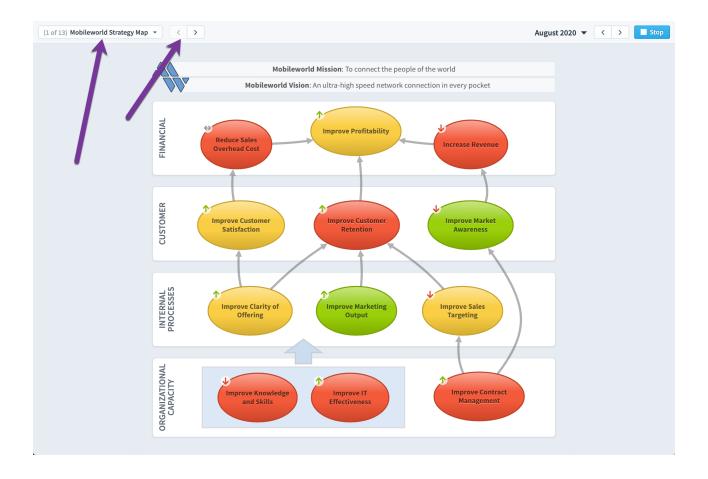
Starting a Briefing

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

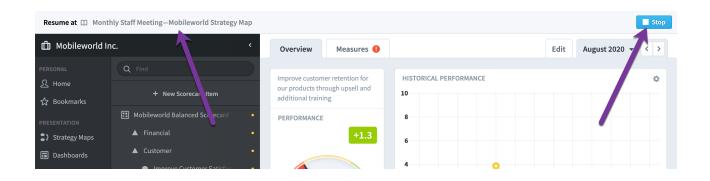
To start a briefing, go to the Briefings section, select which briefing you want, and click Start.



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:

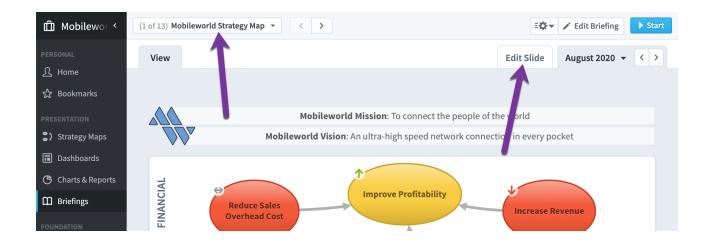
Mobilework Sales vs. Expenses		0	*	▲	B	4
New Briefing Slide						
CHOOSE NAME						
Slide Name						
Sales vs. Expenses						
CHOOSE A CALENDAR PERIOD						
Relative By Date						
Current Period 👻						
CHOOSE A BRIEFING				-	- Add	
Q Find	Q Find					
Mobileworld Inc.						
Key Measures	Ш Monthly Staff Meeting 3					
O Financial						
O Marketing						
O Customer Support						
O Sales						
O Operations						
O Information Technology						
*∃ Expand All	~ 두 Expand A	u				
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.

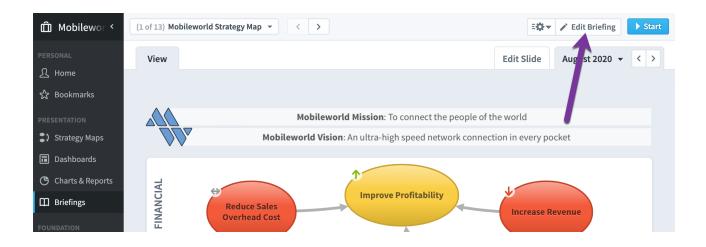


The only things to edit here are the things we set up when creating the slide, its name and calendar period.

🛱 Mobilewor <	(1 of 13) Mobileworld Strategy Map 🔻 < 🗲	Edit Briefing
PERSONAL	View	Edit Slide
윴 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 > Strategy Maps Image: Dashboards	C→ Move D Copy Delete SLIDES (13)	Cancel Save
Charts & Reports	Mobileworld Strategy Map	
Briefings FOUNDATION	Key Measure History MOBILEWORLD INC.	=
ScorecardsInitiatives	Sales Pipeline MOBILEWORLD INC.	
🕒 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.

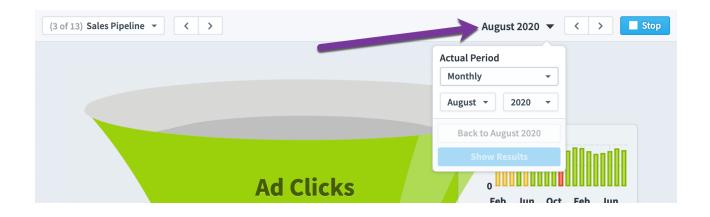
💽 < 🤉 7th Infantr	ry Division (W5AAFF) <		MJA0)SRA ▼ < >
ည် Home	Q Find	Num	
☆ Bookmarks Dashboards	+ New Briefing 🗅 New Folder	Name Spiritual Readiness Assessment Brief	
Charts & Reports	Spiritual Readiness Assessment Brief	G Move 히 Copy 🕆 Delete	Cancel Save
Briefings			
Scorecards		SLIDES (5)	😚 Add Web Slide
✓ Initiatives		Cavalry Troop/Cavalry Squadron (Stryker Brigade Combat Team (SBCT)	Add Web Slide
Datasets		CAVALRT TROOP/CAVALRT SQUADRON (STRTKER BRIGADE COMDAT TEAM (SBCT)) F	
🕒 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
		Cavairy Iroop/Cavairy squadron (Stryker Brigade Combat Ieam (SBC1) Cavalry Troop/Cavairy squadron (Stryker Brigade Combat Team (SBC1) C	Cancel Save
		Weapons Troop/Cavalry Squadron (SBCT) (WJMJD0)_SRA Results WEAPONS TROOP/CAVALRY SQUADRON (SBCT) (WJMJD0)	
		Headquarters and Headquarters Troop/Cavalry Squadron (Stryker Brigan HEADQUARTERS AND HEADQUARTERS TROOP/CAVALRY SQUADRON (STRYKER BRIGA	
Q ✿ ◀	*∃ Expand All 🖌 ✔ Done ┥		

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

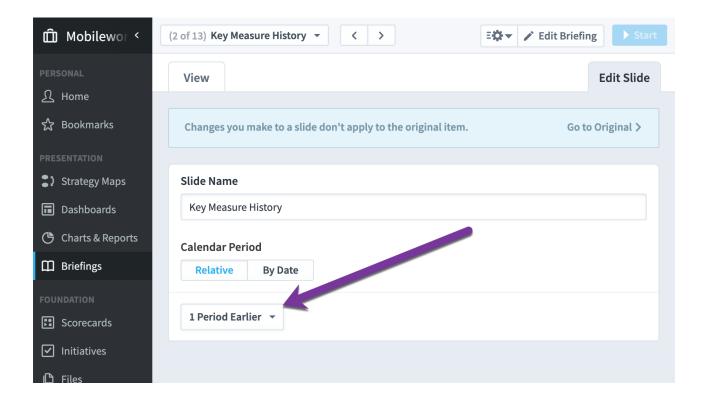
(5 of 13) 2020 Meeting Notes		Stop
Febru	ary 2021 Internal Meetings	
What's	going on here?	
This is a sha a web slide.	ed Google Doc that we've published to the web and then added to the Briefing as	
	rch 2020 Internal Meetings 🙀	
File	Edit View Insert Format Tools Ar	
5	Share Iormal text -	
	New ►	
	Open 육이 Make a copy	

Briefing Slide Calendar Periods

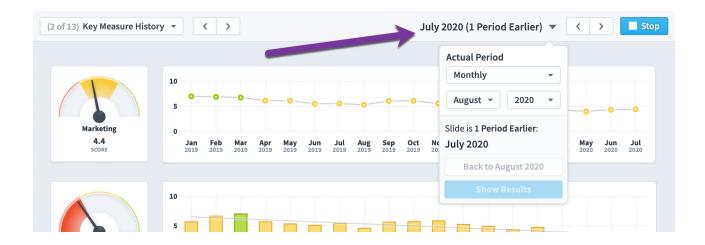
Throughout the software, Spider Impact has a calendar period selector in the upper right corner that shows you the period for the data that you're viewing. It works the same in dashboards as it does everywhere else. If you click the name of the calendar period on top, you can choose to view another period.



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 👻 <	Etit Briefing > Start
PERSONAL	View	Edit Slide
숪 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		
Scorecards	Monthly - August - 2021 -	
✓ Initiatives		
🕒 Files		

And this is what it looks like during a briefing.

(4 of 13) Effects of IT Init	iatives 👻 < >			August	2021 (Specific Period) 💌	< > Stop
					Actual Period August 2020	
					Slide is Specific Period:	
10	MIGRATE SERVERS TO CLOUD			BUILD A SEO CAPABILI	Monthly -	
			100%		August • 2021 •	100%
	\$140K	/ř		\$350K	Back to August 2020	
	\$120K			\$300K	Show Results	80%
	\$100K	il	c.0%	\$250K	i,	6004

Equations

Equations are great for combining values from other places in Spider Impact. They're used throughout the software for things like calculated KPI values, building dataset fields, and adding advanced filters to reports, charts, and dashboards.

Referencing Other Values

There are several types of values you can reference in equations. KPI values can only be used in calculated KPI equations. They're referenced by scorecard item ID like this:

M(123)				
tiatives	Gross Profit	Scoring Type	Calendar	Data Type

Set Equat	ion			
Actual Value	Equation			allowed input: + - */()
Туре	КРІ	Series	Period	
KPI 👻	(1673) Product Revenue 🧪	Actual Value 👻	Current 👻	
Cancel				Done
		Carcolate		

Scorecard item scores are the same kind of thing. They're only used in KPI equations, and they're referenced by scorecard item ID like this:

S(123)

Operating Exper	1565 • :				
Net Operating	Set Equation	on			Туре
	Actual Value Eq	uation		allowed input: +- */()	Currency
	M(1673) +	M(1674) + M(1675) + I(TB,8017) +	S(921)		mal Precision
					fault
	Туре	Scorecard Item	Period		
	Score 👻	(921) Improve Customer Satisfaction 💉	Current 👻		
	Cancel			Done	
		Actual Value	Red Flag	Goal	

Similarly, initiative values are also only used in calculated KPI equations. They're referenced by initiative ID and field like this:

I(BR, 123)

Set Equatio	n		
Actual Value Equ	uation	allowe	d input: + - */()
M(1673) +	M(1674) + M(1675) + I(TB,8017)		
Tupo	Initiative	Calculation	
Type		Total Budget - Add	
		% Complete	
Cancel		Projected Schedule Variance	Done
	Actual Value	Total Budget	G
	Calculated	Money Spent to Date Budget Remaining	•
	Any missing value makes entire equa		\$
	M(1673) + M(1674) + M(1675)	Dreiested Dudget Verience	

Dataset values are different. They can only be used in calculated dataset fields and filters. They're referenced by field name like this:

		_
dd Field		
quation		wed input: + - */
if([Company] != "", [Company]	, [POC First Name] + " " + [POC Last Name])	
if([Company] != "", [Company] CHOOSE SOURCE FIELD OR COLUMI Dataset		
CHOOSE SOURCE FIELD OR COLUM	N	▼ Add

This is just the start of what you can do with references to other values. Please see the the <u>Calculated KPIs</u> and <u>Dataset Equations: Fields and Filters</u> articles for more information.

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))

Text (String) Manipulation

You can concatenate text together with the + symbol, and you can reference specific text in quotes. For example, here's how you'd create a new text string that is the first name field, then a space, then the last name field:

[First Name] + " " + [Last Name]

You can also do text manipulation on numbers if you first tell the software to treat the number like text. In this example, we want to get the first four characters of a number. To do this, we first have to concatenate the number with blank text to turn it into text.

left(""+[myNumber],4)

Yes/No KPI Values

Yes/No values can be referenced as booleans (true/false) or as numbers (1/0).

In this example, we're building an equation for a number KPI, and we're using the value from a Yes/No KPI in that equation. "If the value for KPI #123 is yes, return 5. Else return 20"

if(M(123), 5, 20)

It goes the other way too. In this example, we're building an equation for a Yes/No KPI, and we're using the value from a number KPI in that 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 in a Yes/No KPI's equation.

Because Yes/No KPI values are treated as 1 and 0, you can even use them in functions just like any other KPI value. In this example we're building an equation for a calculated Yes/No KPI. This equation looks at three other Yes/No KPIs. If most of them are yes, it returns yes. If most are no, it returns no.

if(avg(M(123), M(456), M(789)) > 0.5, true, false)

Dates

You can adjust a date by a certain number of days using the plus and minus operators (+ and -). For example, this means 5 days after the incident date:

[Incident Date] + 5

and this means 5 days before the incident date:

[Incident Date] - 5

You can adjust a date by years, months, or days by using the add() and subtract() functions. For example, this would be three months after the incident date.

```
add([Incident Date], 3, "months")
```

and this would be one year before the incident date:

subtract([Incident Date], 1, "years")

You can reference specific attributes of a date by using the month(), year(), dayofweek(), dayofmonth(), and dayofyear() functions. Months are returned as 1 (for January) - 12 (for December) and days of the week return 1 (for Sunday) - 7 (for Saturday). For example, if the incident rate for a record were on July 1st, 2022, this would return a value of 7:

```
month([Incident Date])
```

And this would return 184:

dayofyear([Incident Date])

To reference the current date, use the today() function:

today()

You can parse dates from strings that are in ISO-8601 format with the date() function. For example, this evaluates to December 31st, 2018:

date(2018-12-31)

If the date string isn't in ISO-8601, you can tell Impact how to parse the dates with Y, M, and D characters. If mydate were formatted like 3/15/2020 you'd use:

date(mydate, 'm/d/y')

If mydate were formatted like 15-Mar-20 you'd use:

date(mydate, 'd-m-y')

If mydate were formatted like March 15, 2020 you'd use:

```
date(mydate, 'm d, y')
```

Like all functions in equations, you can combine multiple date functions together. For example, here's how to determine the number of days in the current year:

```
dayofyear(year(today())+"-12-31")
```

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	11

Functions

This is a comprehensive list of all functions available in Spider Impact. Please see the <u>Calculated KPIs</u> article for more information and examples about using the most popular functions.

Spider Impact Functions	Format	Notes
Empty (blank, null) value check	isblank(kpi_id)	
N/A (not applicable) value check	isna(kpi_id)	KPIs only
KPI's own value	M()	KPIs only

KPI's own threshold	T(field)	KPIs only
KPI's own value in another period (three earlier)	M(-3p)	KPIs only
KPI's own threshold in another period	T(field, -3p)	KPIs only
another KPI value	M(kpi_id)	KPIs only
another KPI threshold	T(kpi_id, field)	KPIs only
another KPI value in another period	M(kpi_id, -3p)	KPIs only
another KPI threshold in another period	T(kpi_id, field, -3p)	KPIs only
another scorecard item score	S(item_id)	KPIs only
another scorecard item score in another period	S(item_id, -3p)	KPIs only
initiative item's value (see above for list of fields)	l(field, initiative_id)	KPIs only
To-date aggregation (Sum or Average)	TD(calendar, kpi_id, field, aggregation)	KPIs only

Text (String) Functions	Format
Concatenation	mystring1 + mystring2
Left (first 4 characters)	left(mystring, 4)
Right (last 4 characters)	right(mystring, 4)
Middle (3-character string starting at the second character)	mid(mystring, 2, 3)
Substring (Starting at the second character and ending at the third)	substr(mystring, 2, 3)
Substring (Everything starting at the second character)	substr(mystring, 2)
Lower Case	lower(mystring)
Upper Case	upper(mystring)
Length	len(mystring)
Trim Whitespace	trim(mystring)

Date Functions	Format
Day Addition, Day Subtraction	+, -
Add months, days, or years	add(mydate, 3, "months")
Subtract months, days, or years	subtract(mydate, 2, "years")
Month [1 (January) to 12 (December)]	month(mydate)

Year	year(mydate)
Day of the week [1 (Sunday) to 7 (Saturday)]	dayofweek(mydate)
Day of the month [1 to 31]	dayofmonth(mydate)
Day of the year [1 to 365]	dayofyear(mydate)
Current date	today()
Date parse (ISO-8601)	date(mydate)
Date parse (example, March 15, 2020)	date(mydate, 'm d, y')

Statistical Functions	Format
Average (ignores blanks)	avg(x1, x2, x3,)
Sum	sum(x1, x2, x3,)
Minimum (ignores blanks)	min(x1, x2, x3,)
Maximum (ignores blanks)	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)

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)

Always use "." for decimal and "," for functions

Many European languages use the "," character for the decimal separator and "." for the thousands separator. For everywhere except equations, Spider Impact looks at your browser's language settings and correctly displays numbers based on your region.

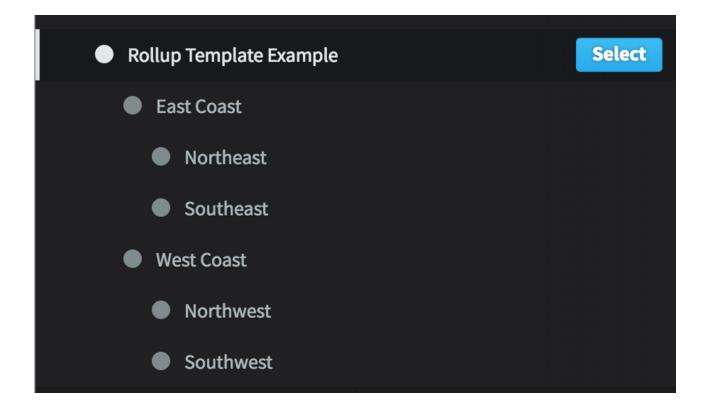
Equations in Spider Impact are different. Regardless of your language settings, you'll need to use "." for decimal separators and "," for separating function arguments. This is common in programming languages and allows you to build advanced equations in Spider Impact that are used across regions.

Organizations and Templates

Rolling Up KPIs Across Organizations

Overview

You can use <u>templated organizations</u> to create an organization tree that tracks the same KPIs for each organization. With rollup KPIs, you only have to update the KPIs at the bottom of the tree. The software will then automatically roll the KPI values up the tree to create totals for the KPIs in the higher organizations.

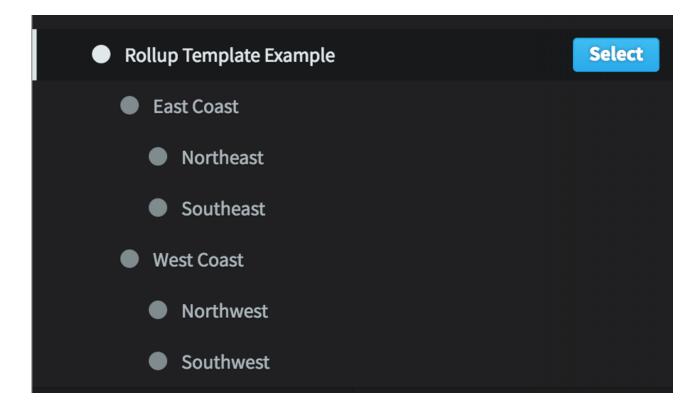


Building Rollup KPIs

KPI values can be updated in a variety of ways. They can be updated manually, they can be calculated, or they can be part of template rollups. When you select the "Template Rollup" update type, Spider Impact automatically aggregates the KPI values from children organizations that are based on the same organization template. To set up these automated rollup KPIs, first create an organization that you want to use as your template. Any KPIs in the template that you want to be automatically calculated should have the update type of "Template Rollup." You also can change the <u>Template Rollup Equation</u>, which determines how the KPI values will be aggregated together as they're rolled up the organization tree.

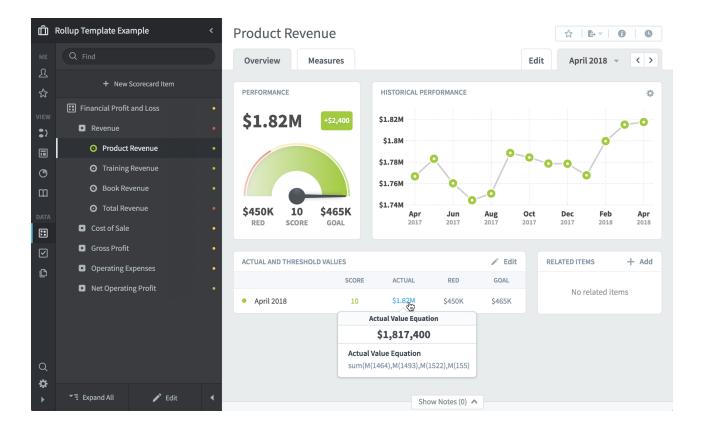
Scoring Type	Calendar		Data Type	
Goal/Red Flag	▼ Monthly	•	Currency	•
Aggregation Type	Template Rollup Equation	ı	Decimal Precision	
-≍ Average		-	Default	•
Currency				
Currency Default	•			
	•			
Default	•			
Default			Goal	
Default SERIES Actual Value	▼ Red Flag	•	Goal [⊄] Manual	
Default	Red Flag	•		-

Once you've created your organization with rollup KPIs, the next step is to create templated copies of that organization in a tree structure. In this example, "Rollup Template Example" is the template organization we built, and the six organizations underneath it are templated copies.



Finally, update the KPIs in the organizations at the bottom of the organization tree. The KPIs in the organizations higher up the tree will automatically have calculated values based on the KPIs in lower organizations.

For example, when we go to the highest-level organization and hover over the "product revenue" actual value, we can see that its actual value is being automatically calculated.



We can click on this value to see more information about where the data actually comes from.

Data Used in Calculations	
ACTUAL VALUE EQUATION	
Any missing valu Southwest Product Revenue sum(M(1464),M(1493),M(1522) M(1551)	
APRIL 2018 ACTUAL VALUES	
sum(\$476K,\$448K,\$444K \$449K) = \$1.82M	
Close	

By hovering over the different parts of the equation, we can see that this highestlevel KPI is the sum of the KPIs in the four organizations at the bottom of the tree. If you remember, though, the rollup tree is three levels deep. Why is the automatic template rollup equation skipping the middle level of the tree and going directly to the lowest level?

That's on purpose. For "sum" template rollup equations, the results would be the same either way, and it makes things a little simpler to show where the data is really coming from. For "average" template rollup equations, skipping the middle levels avoids some messy math problems that you'd get by taking averages of averages.

Separate Tree and Time Aggregations

Rollup KPIs are aggregated in two different ways. The template rollup equation is used when aggregating values up the organization tree. The aggregation type is used when aggregating smaller calendar periods into larger calendar periods, like turning monthly values into a yearly value.

Scoring Type		Calendar		Data Type	
Goal/Red Flag	•	Monthly	•	Currency	•
Aggregation Type		Template Rollup Equation		Decimal Precision	
⊂"⊐ Average	•	+ Sum	•	Default	•
Currency					

An example will make it easier to understand the need for separate ways to aggregate. Let's say we run a large waste disposal company and we'd like to reduce the number of trucks that are out of service due to them being repaired. We have dozens of trucks in each city, and thousands of trucks across each region, so we realize that there will always be some that are broken. We just want to minimize that number over time.

We'll create a KPI called "Number of trucks out of service" that will track the number of broken trucks. We'll also make it a rollup KPI and build out a multi-level templated organization structure that matches our company.

So, we have a rollup KPI that takes the number of broken trucks and aggregates them up the org tree. What should the template rollup equation be? Sum makes the most sense, because the number of broken trucks at the regional level would be the sum of all broken trucks in that region's cities. Now, how do we aggregate our broken truck KPIs over time? That's a little trickier. Let's say each of the cities update their KPI with a new value every week. What should each city's KPI value be when you look at it yearly? It doesn't really make sense to add all of the weekly values together. That would mean that the more often you measure the KPI, the higher the yearly value will be.

For this KPI, an average aggregation type makes the most sense. If you measure the number of broken trucks every week, and average those numbers over a year, you can good a good feel for how many trucks are out of service most of the time.

With this KPI structure, you could go to a region in the organization tree, change the application calendar to monthly, and you could see the average number of broken trucks in that region for that month. Each city updates their broken truck KPI every week, and the software takes care of the rest.

And that's why there are two different ways to aggregate rollup KPIs. There are situations like our example above where the KPI value should be summed up the rollup tree but averaged over time.

Rollup KPIs Without Templates

The vast majority of the time, rollup KPIs are only used in templated organizations. You may notice, however, that the "Template Rollup" update type shows up as an option for KPIs that aren't part of a template. That's because in some rare situations, you may want to use rollup KPIs with non-templated organizations.

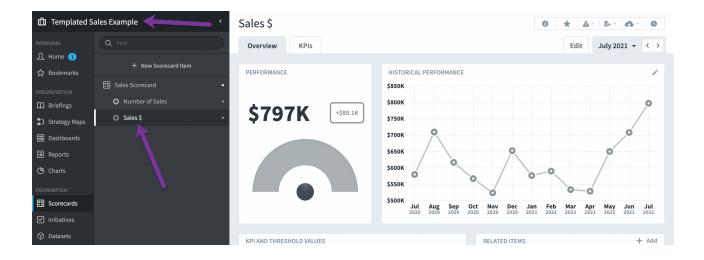
The requirements for non-template structure are the same as templated. The organizations still need to be in a tree, and the scorecard structures that you're using for rollup KPIs need to have the same names. The only difference is that the software is matching the KPIs based on their names and their ancestor's names rather than the template they're using. This is so uncommon, however, that we decided to call the update type "Template Rollup," even though the organizations don't technically have to share a template.

Templated Organizations from Datasets

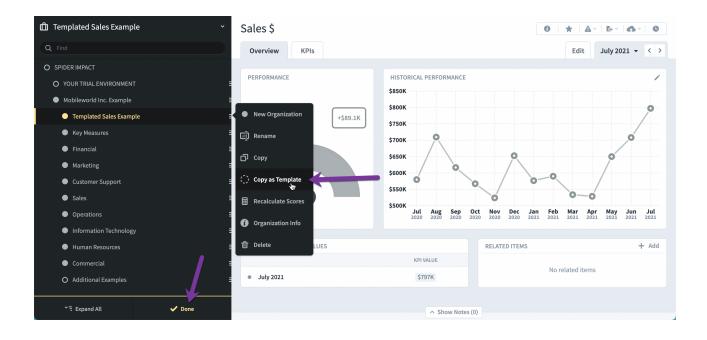
Templated organizations based on dataset values

Organization templates allow you to quickly roll out similar scorecard structures to multiple organizations. When your organizations have dataset KPIs, this process is even easier.

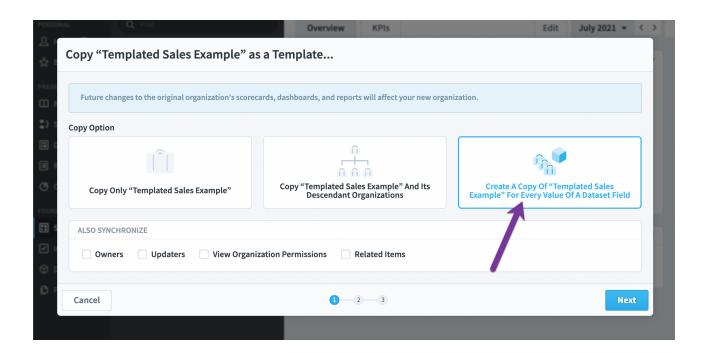
In this example we have an organization called "Templated Sales Example" that has two KPIs. "Number of Sales" tracks the total number of sales over time, and "Sales \$" tracks the value of sales over time. As you can see here, there were \$797,000 in sales in July 2021.



We're going to click on the organization name on top to expand the organization pane, and then put the organization tree into edit mode by clicking on the Edit button on the bottom. Then we'll click on our "Templated Sales Example" organization and choose "Copy as Template".



This opens the new template dialog. The first copy option would create a single copy of our organization. The middle option does the same thing, but would also copy any descendant organizations that we create later. We're going to choose the third option to "Create a copy of 'Templated sales example' for every value of a dataset field".



Our two KPIs are created from the Device Sales dataset, so we'll choose that here. We'll also choose the Sales Employee field. If we decide to not add any filters, Impact will create a separate organization for every sales employee.

Finally, we're going to add a filter to only include records where the sales department is Retail. When you apply a filter, it restricts the records, which in turn can restrict the number of organizations that are created. So, rather than creating an organization for every sales employee, we're going to create an organization for every *retail* sales employee.

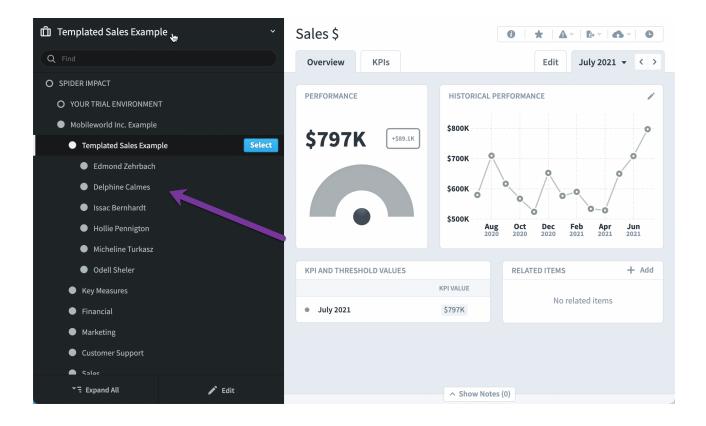
	Q Find	Overview KPIs	Edit July 2021 -	<
	+ Nei	Copy "Templated Sales Example" as a Template	INCE	
	E Sales Scoreca			
	O Number o	A copy of Templated Sales Example will be created for each unique value for the dataset field selected below. You may add filters to limit the generated organizations		٢,
/ Maps	⊙ Sales\$	to certain values.		0
		FIELD	° °	
		Dataset Field	0 0-0	
		Device Sales 🖌 Sales Employee 👻		021
		ACTIVE FILTERS + Add	TED ITEMS	+ /
es 🔚				
	,	Sales Department: is Retail	No related items	
	-	Cancel Back Q-2-3 Next		

The one exception with filters is rollup trees. If the filter is for the same rollup tree field as the field you're using for the template, the filter restricts the organizations you create, but the descendant totals are always used for the KPIs.

The last step in the wizard is to optionally add prefixes or suffixes to the names of templated items. We'll just click Copy.

🛱 Templated S	ales Example	* 4- 5- 6- 0
PERSONAL	Q Find	Copy "Templated Sales Example" as a Template
	+ Net	Each organization's name will include the unique dataset field value. You may optionally add a prefix or suffix to the name of each new organization.
PRESENTATION	Sales Scoreca Number of Nu	ORGANIZATION NAMING
Strategy Maps	⊙ Sales\$	Prefix Suffix
 Dashboards Reports 		value
Charts		You may optionally add a prefix or suffix to the name of the new organization's scorecard, dashboards, and reports. If you choose to add neither, the new items will have the same name as the template.
🗄 Scorecards		If you want to include the dataset field value in the prefix or suffix, you can use [value].
 Initiatives Datasets 		SCORECARD NAMING No related items
D Files		Prefix Suffix Cancel Back Cancel Copy
0,¢2, ∢	* 🗄 Expand All	Calified Back Copy

After a few seconds, new organizations start to appear in the organization tree underneath our template. There are 6 organizations, one for every retail employee.



When we click on Delphine Calmes, we can see that the KPIs now show data specific to that employee. Delphine had \$53,000 in sales in July 2021.

🛱 Delphine Cal	mes	Sales \$	0 * A· B· 6· 0
PERSONAL	Q Find	Overview KPIs	Edit July 2021 🗸 🔇 🗧
요 Home 1 숬 Bookmarks	+ New Scorecard Item	PERFORMANCE	HISTORICAL PERFORMANCE
PRESENTATION			
Briefings	O Number of Sales	\$53.6K -\$7,579	\$65K O
Strategy Maps	⊙ Sales \$	\$53.6K -\$7,579	
Dashboards			\$60K
Reports			\$55K
🕒 Charts			
FOUNDATION			\$50K
Scorecards		•	Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul 2020 2020 2020 2020 2020 2020 2021 2021
Initiatives			2020 2020 2020 2020 2020 2020 2021 2021

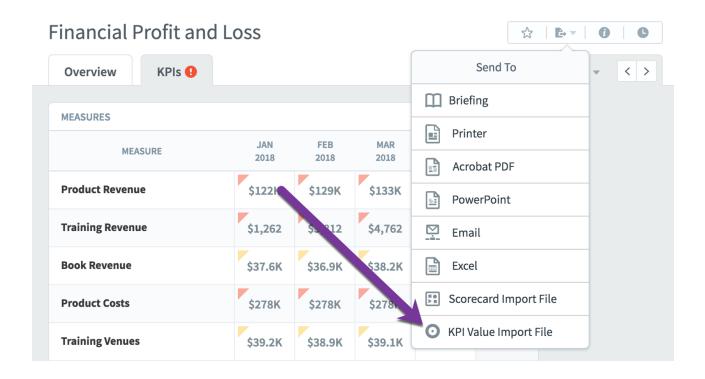
Just like with all organization templates in Impact, you can create additional KPIs in the template and they'll be automatically copied to the templated copies. You can also create KPIs in the templated copy organizations to track things for only that organization.

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.

PI Value Import File: Select Organiz			
 This creates an Excel file in the same format that we read to be a constraint of the same format that we read to be a constraint of the same set of t			nat:
C organizations		SELECTED ORGANIZATIONS	=
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	1 —(2)		Nex

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				
	lue Import File: Choos	e Dates		
E Financial Profit and Los			TOTAL 2017	JAN 2018
Revenue				2018
Cost of Sale choo	se below. If you've chosen KPIs for n	period columns matching the date range yo nore than one calendar, your import file wil	5 25M	\$126K
Gross Profit	one worksheet for each calendar.			P
Operating Expenses			2.87M	\$1,262
DATES	Date 5/2/2017 31	End Date 5/2/2018	5499K	\$35.1K
	312,2011	3/2/2020	3.34M	\$279K
🗌 Incl	ude Calculated Values			
			\$471K	\$38.9K
Choose	a format		91.3K	\$6,920
	Dates In Columns	Dates In Rows		V 1
	Easier to update	Includes thresholds	\$3.9M	\$327K
				P" P
			5.27M	\$439K
			57.4%	57.2%
				V
Cance	l Back	⊘ — 2 — 3	Next 1.89M	\$116K
	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.

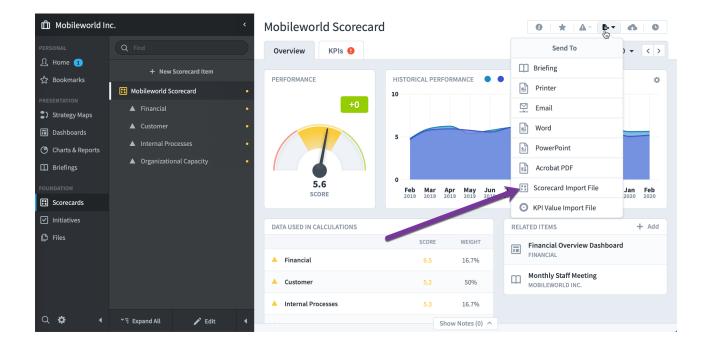
PREVI	EW													
ID	MEASURE	MAY 1, 2017	JUN 1, 2017	JUL 1, 2017	AUG 1, 2017	SEP 1, 2017	OCT 1, 2017	NOV 1, 2017	DEC 1, 2017	JAN 1, 2018	FEB 1, 2018	MAR 1, 2018	APR 1, 2018	MAY 1, 2018
961	Net Operating Profit (before tax)	\$84.7K	\$82.6K	\$84.7K	\$86.2K	\$84.1K	\$83.1K	\$84K	\$80.6K	\$73.4K	\$79K	\$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	1	J	К	L	М	N	0	Р
1	Scorecard	Theme	Measure	Organizatio	n Description	Scoring Typ	e Calendar	Aggregation	Data Type	Weight	Is yes good?	Are higher v	a Start date	Archive date	Threshold	Threshold
2	Financial Pro	ofit and Loss		Financial						1	L					
3		Revenue		Financial						1	L					
4			Product Reve	Financial		Goal/Red F	la Monthly	Sum	Currency	1	L				450,000	465,000
5			Training Rev	Financial		Goal/Red F	la Monthly	Sum	Currency	1	L				255,000	260,000
6			Book Revenu	Financial		Goal/Red F	la Monthly	Sum	Currency	1	L				35,000	40,000
7		Cost of Sale		Financial						1	L					
8			Product Cost	Financial		Goal/Red F	la Monthly	Sum	Currency	1	L				275,834	275,000
9			Training Ven	Financial		Goal/Red F	la Monthly	Sum	Currency	1	L				39,584	38,750
10			Book Product	Financial		Goal/Red F	la Monthly	Sum	Currency	1	L				8,334	7,500
11			Total Costs	Financial		Goal/Red F	la Monthly	Sum	Currency	1	L				323,750	321,250
12		Gross Profit		Financial						1	L					
13			Total Gross F	Financial		Goal/Red F	la Monthly	Sum	Currency	1	L				422,250	432,917
14			% Gross Prof	Financial		Goal/Red F	la Monthly	Average	Percentage	1	L				56.6	57.4
15		Operating Ex	penses	Financial						1	L					
16			Salaries & W	Financial		Goal Only	Monthly	Sum	Currency	1	L	FALSE			153,096	
17			National Insu	Financial		Goal Only	Monthly	Sum	Currency	1	L	FALSE			21,128	
18			Pension Cont	Financial		Goal Only	Monthly	Sum	Currency	1	L	FALSE			4,593	
19			Marketing &	Financial		Goal Only	Monthly	Sum	Currency	1	L	FALSE			49,021	
20			Sales & Gen	Financial		Goal Only	Monthly	Sum	Currency	1	L	FALSE			30,167	
21			Interest & Ba	Financial		Goal Only	Monthly	Sum	Currency	1	L	FALSE			7,542	
22			Insurance	Financial		Goal Only	Monthly	Sum	Currency	1	L	FALSE			15,084	
23			Office Renta	Financial		Goal Only	Monthly	Sum	Currency	1	L	FALSE			24,888	
24			IT & Commu	Financial		Goal Only	Monthly	Sum	Currency	1	L	FALSE			23,380	
25			Travel	Financial		Goal Only	Monthly	Sum	Currency	1	L	FALSE			13,575	
26			Amortisation	Financial		Goal Only	Monthly	Sum	Currency	1	L	FALSE			15,084	
27			Total Operat	Financial		Goal Only	Monthly	Sum	Currency	1	L	FALSE			357,554	
28		Net Operation	ng Profit	Financial						1	L					
29			Net Operatir	Financial		Goal/Red F	la Monthly	Sum	Currency	1	L				63,917	75,364
30			% Net Opera	Financial		Goal/Red F	a Monthly	Average	Percentage	1	L				8.6	10
31																
32																

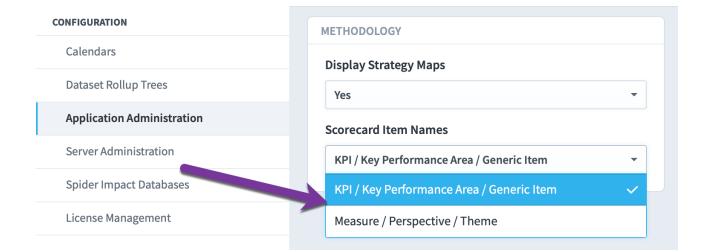
Application Administration

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

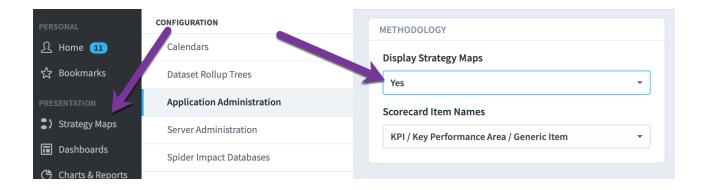
There's a new Methodology section in Application Administration where you can choose what language to use in Spider Impact. For scorecard item names you can choose between balanced scorecard language like *Measure, Perspective,* and *Theme*. Another option is KPI language like *KPI, Key Performance Area,*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

ME	Administration	USERS 🚯 🕇
<u>ደ</u>	PERSONAL	Q Find
숬	My Profile	
view	My Alerts	Adam Admin
•′ •	USERS & GROUPS	Full User
Ċ	Users	
ш	Groups & Permissions	Henry HR
DATA	Send Broadcast Alert	Ivan Interactive
::	DATA IMPORT & EXPORT	Ivan interactive
\checkmark	Shared Dashboards and Strategy Maps	Pamela Power
ß	Scheduled Exports	
	Imports	Ursula Updater
	Import Connections	Victor Viewer
	CONFIGURATION	
	Calendars	
	Application Administration	
	MONITORING	
	Current User Activity	
Q	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			
Usernamo Email Ado			
First Name	Middle	Last Name	
Password	Ret	ype Password	
✓ User Must Change	Password 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 Home 2	PERSONAL	Q Find	
☆ Bookmarks	My Profile	Brandon Sampson	
PRESENTATION Strategy Maps	My Alerts	Branuon Sampson	
 Dashboards 	USERS & GROUPS	Dale Peterson	
🕒 Charts & Reports	Users		
Briefings	Groups & Permissions	Janet Montgomery	•
	Send Broadcast Alert	José González	
Scorecards	DATA IMPORT & EXPORT		
✓ 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.

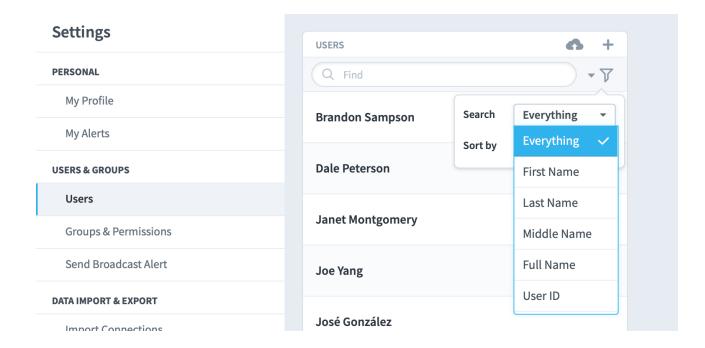
	Settings					
	PERSONAL	Import Users				
	My Profile					
	My Alerts	 You can upload new users or update existing users by username. Your CSV file must be same format as the example file. 				
 Strategy Maps Dashboards 	USERS & GROUPS	 Your CSV file must have the same format as the example file. The following columns are required: username, first_name, last_name, email, 				
Charts & Reports	Users	 password New users will be required to change their password the first time they log in. For existing users, specifying a password will reset their password and force them to change it on their next login. The username column should be lowercase 				
	Groups & Permissions					
	Send Broadcast Alert	The username column should be lowercase The middle_name column is optional The group, key column is optional and should reference the groupid in the group				
	DATA IMPORT & EXPORT	table 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 1 2 Next				
	Annellanden Administra	View Celu				

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.

NAME EMAIL PASSWORD GROUP_KEY
son email@address defaultpassword
email@address defaultpassword
ly email@address defaultpassword
n

Searching Specific User Fields

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



Permissions

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

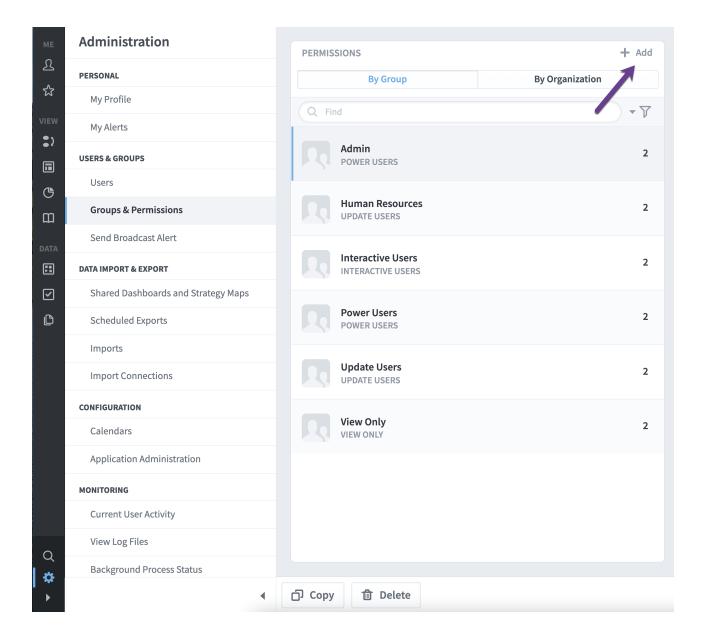
Groups

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)	
мемвекs (0) Add member	
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

O 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	\checkmark
Change Personal Profile				
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	 Image: A start of the start of
Update All Viewable Scoring Threshold Values	Modify Organizations & Scorecard Items		Modify View Organization Permissions	
	Modify Owners and Updaters		Modify All Scheduled Exports	 Image: A start of the start of
Edit Initiatives	Modify Scorecard Overview		Modify All Imports	
Update Initiative Status			Modify Import Connections	
•	DASHBOARDS & STRATEGY MAPS			
Archive Initiatives	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

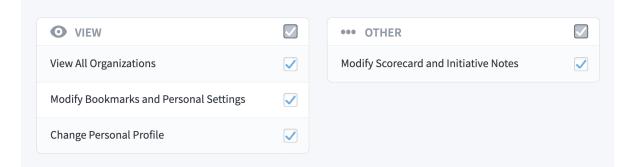
O VIEW	••• OTHER	
View All Organizations	Modify Scorecard and Initiative Notes	
Modify Bookmarks and Personal Settings	Modify Related Items	
Change Personal Profile		
• UPDATE KPIS		
Update All Viewable KPI Actual Values		
Update All Viewable Scoring Threshold Values		
Edit Initiatives		
Update Initiative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

View Only users can only view things in Spider Impact.

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

Copying Groups

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

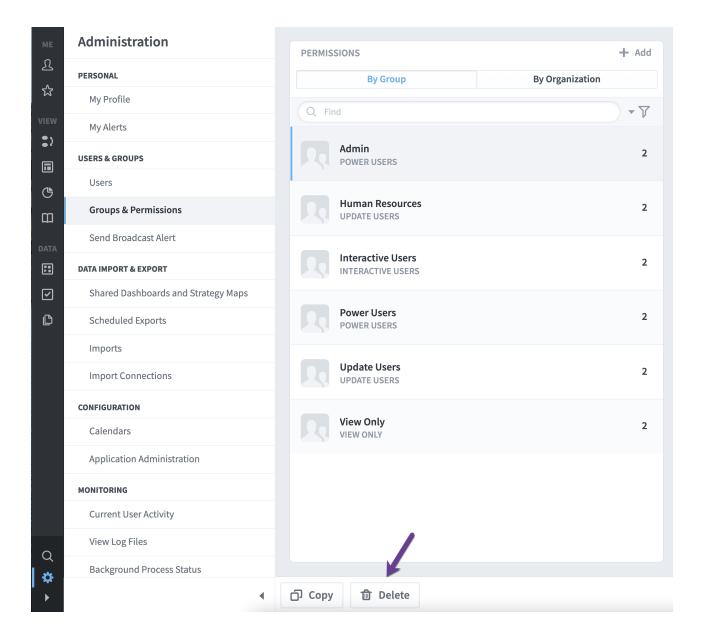
PERSONAL	Settings	PERMISSIONS	+ Add	HELP DESK & IT SUPPORT
A Home 2	PERSONAL	By Group	By Organization	Name
☆ Bookmarks	My Profile	Q Find	۲	Help Desk & IT Support
PRESENTATION PRESENTATION Strategy Maps	My Alerts	Admin	1	Group Type
Dashboards	USERS & GROUPS	POWER USERS	1	Communication Users 👻
Charts & Reports	Users	Demo Updaters	1	Permissions
Briefings	Groups & Permissions			Advanced Organizat Datasets
	Send Broadcast Alert	Help Desk & IT Support COMMUNICATION USERS	2	MEMBERS (1)
Scorecards	DATA IMPORT & EXPORT	Limited Updater	2	Add member
✓ Initiatives	Imports	COMMUNICATION USERS		Add member
🕒 Files	Import Connections	Updaters COMMUNICATION US	5	Mike Johnson
	Scheduled Exports	Viewer Only	1	ADMINS (1)
	Shared Dashboards	COMMUNICATIO	1	Add admin
	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	
Copy "Help Desk & IT Support"		Communication Users	
Jsers		Permissions	
Groups & Permissions	Please choose a name for your new group. If you want, you	Advanced Orga	
Send Broadcast Alert	can copy over the memberships and permissions from the original group using the checkboxes below.	MEMBERS (1)	
A IMPORT & EXPORT			
mport Connections	Name	Add member	
Scheduled Exports	Help Desk & IT Support Copy	Janet Montgomery	
Shared Dashboards	Also Copy		
snared Dashboards	Group Members	ADMINS (1)	
IFIGURATION	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.



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 O	rganization	Name	
My Profile	Q fort	•7	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 🛱 Organization 🕅 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	

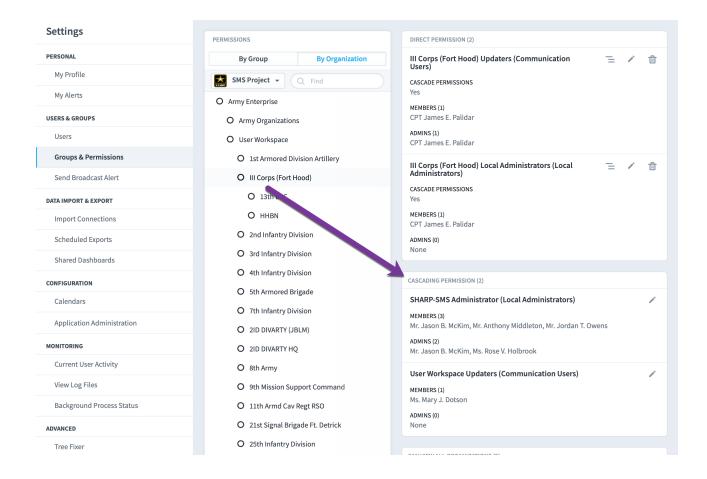
The "By Organization" view allows administrators to see all groups who can view a particular organization. The idea here is that you can choose an organization and then see exactly who has permission to view it.

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

Settings				
occumpo	PERMISSIONS	DIRECT PERMISSION (2)		
PERSONAL	By Group By Organization	III Corps (Fort Hood) Updaters (Communication 📃 🖍 🍵		
My Profile	SMS Project - Q Find	CASCADE PERMISSIONS		
My Alerts	O Army Enterprise	Yes		
	O Anny Enterprise	MEMBERS (1)		
USERS & GROUPS	O Army Organizations	CPT James E. Palidar		
Users		ADMINS (1)		
	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 ESC	CASCADE PERMISSIONS Yes		
Import Connections	О ннви	MEMBERS (1)		
	O 2nd Infantry Division	CPT James E. Palidar		
Scheduled Exports	O 2nd mantry Division	ADMINS (0)		
Shared Dashboards	O 3rd Infantry Division	None		
	O 4th Infantry Division			
CONFIGURATION		CASCADING PERMISSION (2)		
Colordon	O 5th Armored Brigade			
Calendars	O 7th Infantry Division	CAN VIEW ALL ORGANIZATIONS (2)		

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

organization.



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

Settings					
	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	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	CASCADE PERMISSIONS Yes			
Import Connections	О ННВМ	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				
	O 7th Infantry Division	CAN VIEW ALL ORGANIZATIONS (2)			
Application Administration	O 2ID DIVARTY (JBLM)	SMS System Admins (Power Users)			
MONITORING	O 2ID DIVARTY HQ	MEMBERS (8) Mr. Jason B. McKim, Mr. Scott T. O'Reilly, Mr. Matthew Sgarlata, Ms. Rose V.			
Current User Activity	O 8th Army	Holbrook, Tom Kuo, Jeffrey K. True, Mr. Michael C. Buckley, SSG Brian M. Riddle ADMINS (2)			
View Log Files	O 9th Mission Support Command	Mr. Conor D. Crimmins (SMS Admin), Mr. Michael C. Buckley			
Background Process Status	O 11th Armd Cav Regt RSO	SMS Administrators (Power Users)			
ADVANCED	O 21st Signal Brigade Ft. Detrick	MEMBERS (22) Mr. Hank Scharpenberg, Mr. Jasen R. McKim, Mr. Scott T. O'Peilly, Mr. Brandon			
Tree Fixer	O 25th Infantry Division	Mr. Hank Scharpenberg, Mr. Jason B. McKlim, 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)			
SQL Console	O 62nd Medical BDE				
	O 81st Readiness Division				
	O 81st RD (Franklin) 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, I				
	O (81st RD) Ariel Rosario Training node	Chattender, MS. Kose V. Holbrook, Mr. George A. Addott, MS. Giovanna Q. Wine, M Chester W. Hoch, Mr. Dave J. Miller			

- $O \hspace{0.1in}$ (81st RD) Ariel Rosario Training node
- O 88th Readiness Division