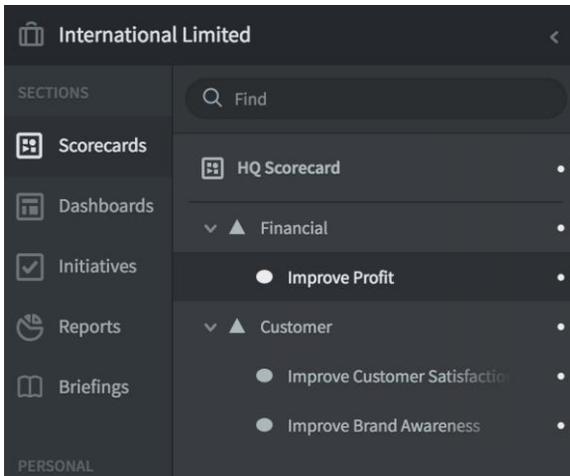




Adding Metrics - 1

Metrics can appear under a Scorecard, Perspective, Objective or Generic Area.

Metrics are the 'engine' of the scorecard. When you add actual values to metrics, a score is generated and the whole scorecard will 'colour-up'.

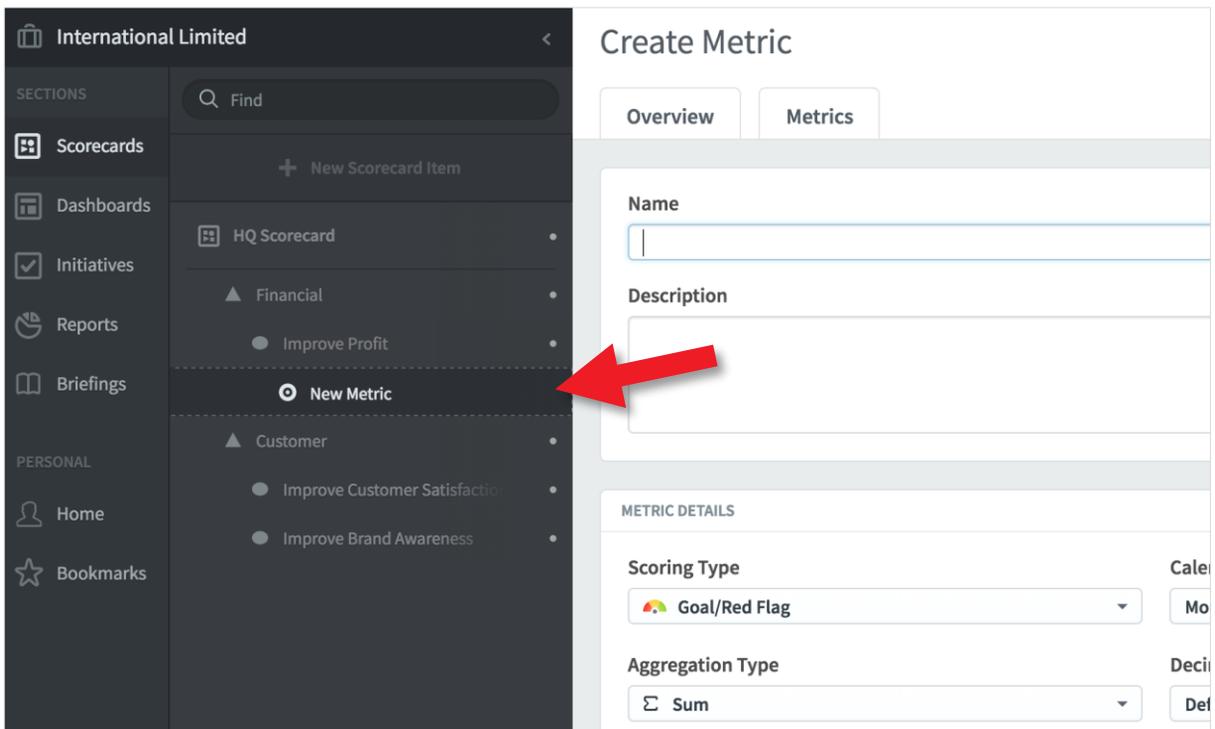


Click on the scorecard item under which you want the Metric to appear.

In our example we have highlighted **Improve Profit** and we will be adding the Metric **Profit**.

Click on Edit at the bottom of the menu list - you will be taken into edit mode and the Edit Objective dialogue will appear on the right

Click on the **+ New Scorecard Item** button and the Metric dialogue will appear together with a New Metric under the Objective:





Adding Metrics - 2

You do not have to provide all of the details at this stage, but there are a few things you need to add, follow this sequence:

The screenshot shows the 'Create Metric' interface. At the top, there are tabs for 'Overview' and 'Metrics', and a date selector for 'November 2016'. The form is divided into several sections:

- Name:** A text input field with a red circle '1' next to it.
- Type:** A dropdown menu with 'Metric' selected and a red circle '2' next to it.
- Description:** A large text area with a red circle '3' next to it.
- Metric Details:**
 - Scoring Type:** A dropdown menu with 'Goal/Red Flag' selected and a red circle '4' next to it.
 - Calendar:** A dropdown menu with 'Monthly' selected and a red circle '5' next to it.
 - Data Type:** A dropdown menu with '# Number' selected and a red circle '6' next to it.
 - Aggregation Type:** A dropdown menu with 'Sum' selected and a red circle '7' next to it.
 - Decimal Precision:** A dropdown menu with 'Default' selected.
- SERIES:**
 - Actual Value:** A dropdown menu with 'Manual' selected.
 - Red Flag:** A dropdown menu with 'Manual' selected and a red circle '8' next to it.
 - Goal:** A dropdown menu with 'Manual' selected and a red circle '9' next to it.
- OWNERS:** A section with 'Add Owner...' text.
- UPDATERS:** A section with 'Add Updater...' text.

At the bottom right, there are 'Cancel' and 'Create' buttons.

1. Give the metric a name - this should be a label 3-5 words long
2. Select the Type - this should be Metric
3. Provide a description - this is optional but it is good practice to provide a description which includes where the metric data can be found.
4. Select the Scoring Type - the scoring type can be one of eleven types. On most occasions this will be Goal/Red Flag (Red/Amber/Green)
5. Select the Calendar - this relates to the frequency the data is collected, normally monthly for general management reporting.



Adding Metrics - 3

6. Select the Data Type - the application can handle Currency, Percentage, Numeric and Yes/No data
7. Select the Aggregation Type - this tells the application what to do with actual values when looking at them using a calendar other than the frequency collected calendar previously selected.

For example, for a **Currency** the aggregation type is normally **Sum**. When looking at monthly data with a yearly calendar, you want the application to sum the months.

For a **Percentage** the aggregation type is normally **Average**. When looking at monthly data using a yearly calendar, you want the application to take an average over the months.

Thresholds: You need to tell the application when you expect a Metric to turn red (from amber) and green (from amber)

8. Add the Red Flag threshold. For example, if the metric is deemed to be in the Red below \$25,000, the the Red Flag value is \$25,000
9. Add the Green Flag threshold, this is usually the target
10. Optionally add the Owner of the Metric (this can be done later)
11. Optionally add the Updater of the Metric (this can be done later)

Very Important:

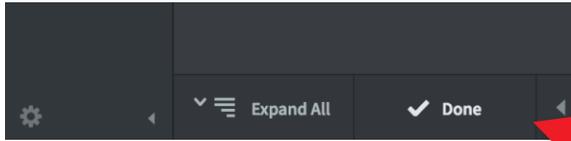
- **When you have entered all of the data Click the blue Create button**

You will be given the opportunity to add another Metric, a blank Create Metric screen will appear. Add as many metrics as you need.



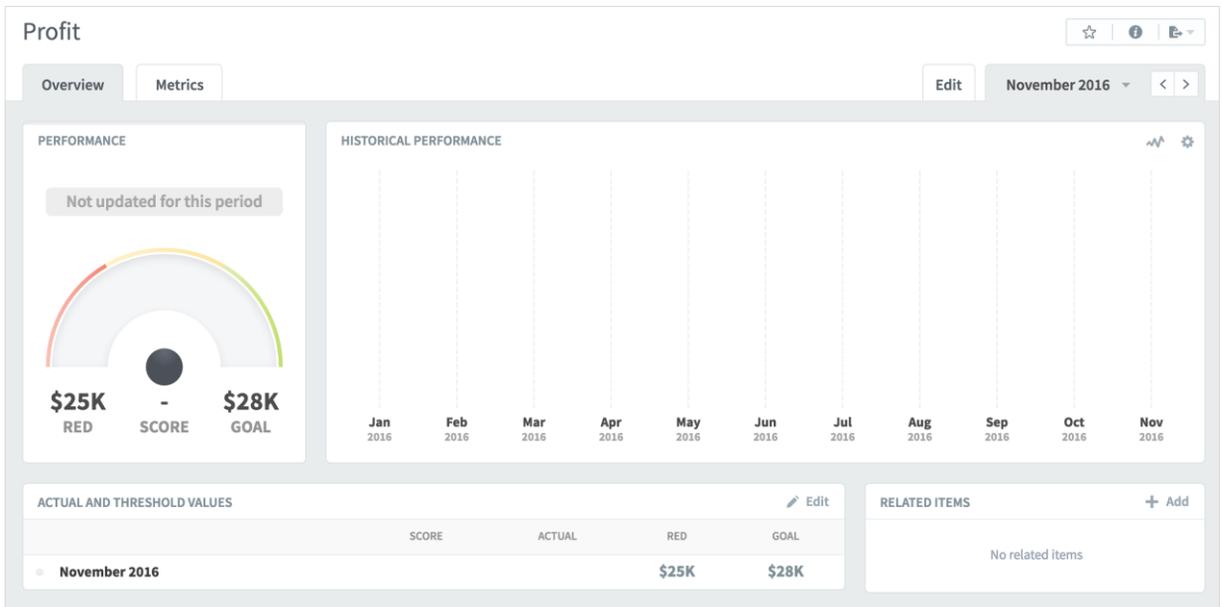
Adding Metrics - 4

Once you have added all of your metrics, you can come out of Edit mode



When you have finished, click **Done** at the bottom of the menu list

The resulting Metric should look something like this:



You can see in this example the Metric is called Profit and the thresholds have been set a \$25k for red and \$28k for green.

You can add more Metrics by going back to the beginning and repeating the process.

The next step is to add some Actual Values to the Metrics



Metrics Details - Cheatsheet

These parameters appear in the **Metric Details** and **Series** panels:

- **Scoring Type:** usually Goal/Red Flag, select from the list
- **Calendar:** Monthly, Quarterly, Yearly or user defined
- **Data Type:** select from one of the three options:
 - *Number* - numerical data, e.g. number of call received
 - *Percentage* - any percentage value, e.g. %Net Profit
 - *Currency* - a number expressed in currency e.g. USD or GBP
- **Aggregation Type:** How to aggregate for a different calendar view
 - *Sum* - data added monthly will be summed up when viewed quarterly or yearly e.g. Revenue is usually defined as Sum
 - *Average* - data that is added monthly will be averaged when viewed quarterly or yearly - e.g. %Net Profit is usually averaged
 - *Last Value* - the last value added will be used when viewed quarterly or yearly - e.g. Cumulative Sales is usually set to Last Value
- **Decimal Precision:** The default can be set in Administration
 - If you require anything other than the default, the decimal precision can be set here with a numerical value e.g. 0, 1, 2 etc.
- **Actual Value:** Manual or Calculated
 - It is possible to use a calculation, this is covered in advanced functions
- **Red Flag and Goal:** When measures turns Red, Amber or Green
 - The application bases all of its calculations on this setting. You need to determine when a performance measure is good, indifferent or bad, that is; Green, Amber or Red. For the Goal Red Flag measure this requires two values:
 - *Red Flag:* when the performance measure turns Red
 - *Goal:* when the performance measure turns Green