



# Adding Perspectives/Objectives

You can add the following items to a Scorecard:

- Perspectives
- Themes
- Objectives
- Measures

If you **only** want to add Measures to your scorecard then skip this guide and go straight to the **Creating Measures** guide

## Adding Perspectives, Themes and Objectives

Perspectives, Themes and Objectives are all types of 'containers' that are used to group Measures. The same process is used to create each of them.

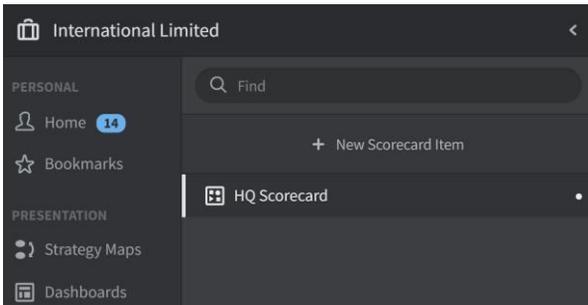
It is up to you to decide how you want to group Measures to best suit your organization. Typically, a grouping might look like this:

- Scorecard
  - Perspective
    - Objective
      - Measure
      - Measure
    - Objective
      - Measure
      - Measure
    - Objective
      - Measure
  - Perspective
    - Objective
      - Measure
      - Measure
  - Etc.

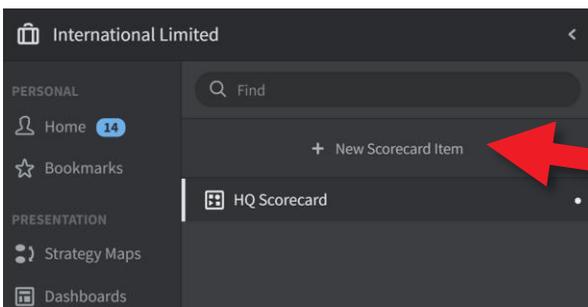


# Adding Perspectives/Objectives

Based on the scoring properties you set for Measures, QuickScore will take care of scoring each Measure and will roll up the score values to the higher levels of Objectives, Themes and Perspectives.

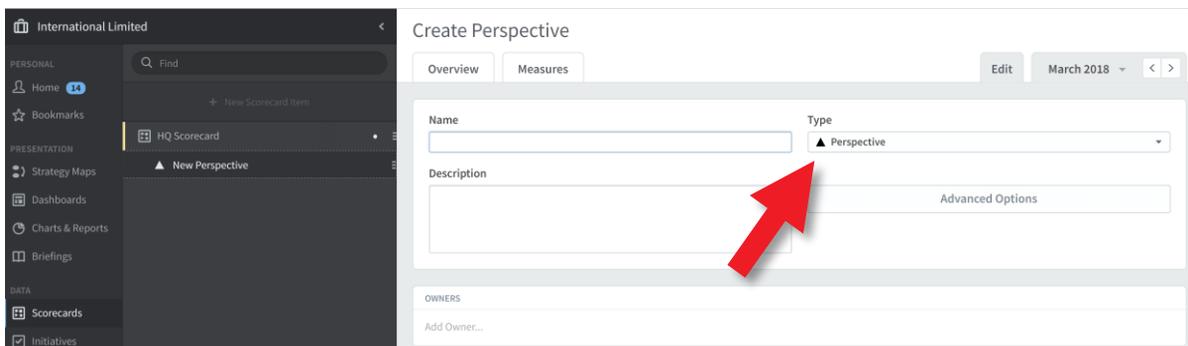


To add a Perspective, Objective or Theme container click on the Scorecard name (in our example **HQ Scorecard**) to highlight the Scorecard



At the top of the Scorecard menu, notice the **+ New Scorecard Item** button

Click on this button and the **Create Perspective** dialogue will appear:



Use the **Type** drop-down to select the type of container you want - they all act in the same way, they just have different names.



# Adding Perspectives/Objectives

To illustrate this process we will add a Perspective called the **Financial** and an Objective called **Improve Profit**

Type

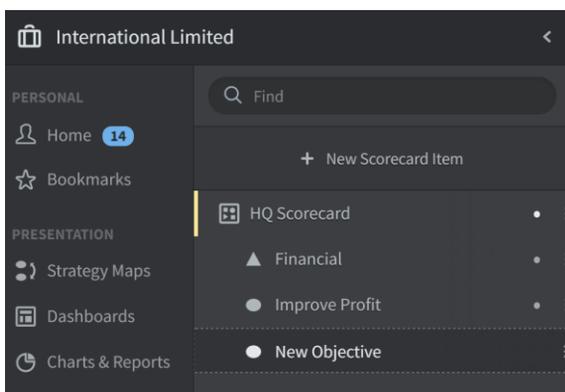
A dropdown menu with the following options: Perspective (selected), Objective, Theme, Measure, and Linked Item.

Click on the Type drop-down and select **Perspective**

Give the Perspective a name, we have called it **Financial**, optionally you can add a description

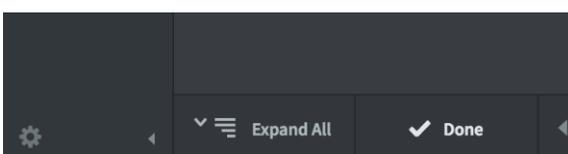
A dialog box with a 'Cancel' button and a blue 'Create' button. A red arrow points to the 'Create' button.

Click on the blue Create button at the bottom of the screen



QuickScore will save the Perspective and you will see it to the left in the list. A blank dialogue box will be presented for the next activity.

This time select **Objective** from the Type drop-down and give the Objective a name. We have called it **Improve Profit**

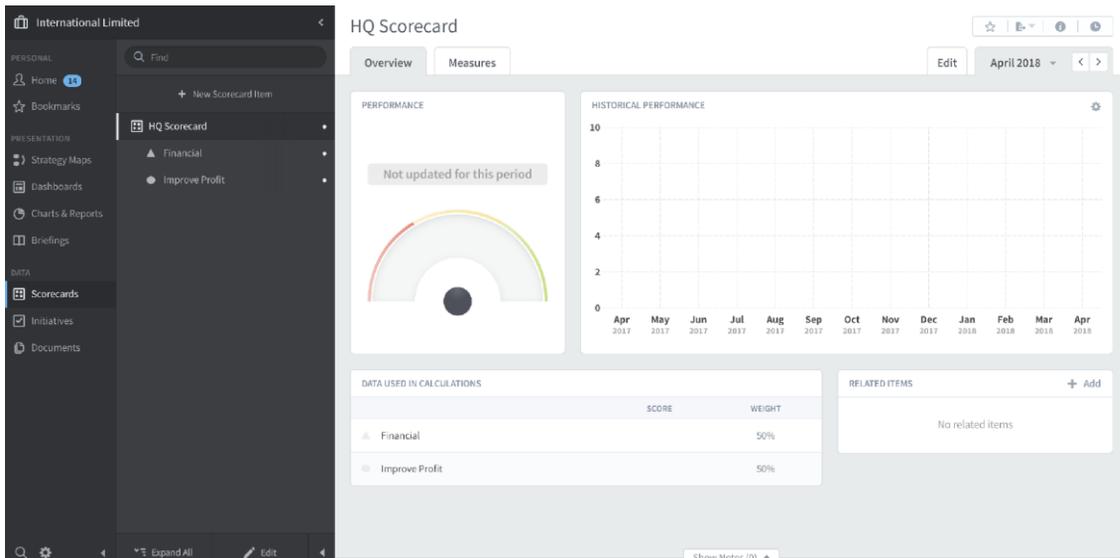


The Objective will appear in the scorecard hierarchy, click on **Done** at the bottom of the black Scorecard navigation pane.

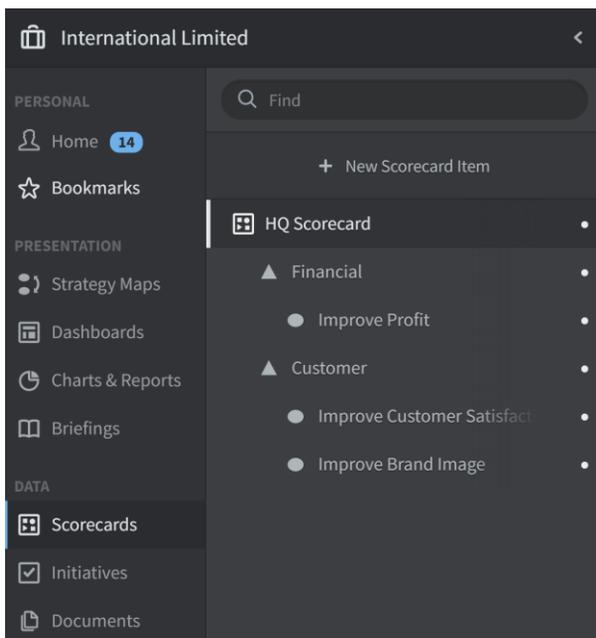


# Arranging a Scorecard

At this point the Scorecard should look something like this:



You can add as many items to your scorecard as you wish. At some point you will need to arrange the items. They can be moved and tiered by dragging and dropping to whatever locations are appropriate.



Click **Edit** at the bottom of the menu list, then drag and drop the items in the list to the correct places.

In the example to the left we have added a Customer Perspective, an Objective called Improve Customer Satisfaction and an Objective called Improve Brand Image

These have been Tiered by dragging and dropping them into the correct position

Click **Done** at the bottom of the menu list when you have finished