

# What's New in 3.2

Guide to new features in QuickScore 3.2 Updated June 4<sup>th</sup>, 2018

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# Your success is important to us!

QuickScore 3.2 is our largest release in 15+ years of business. We've added over 100 large enhancements, most of which were popular customer requests. Needless to say, we're incredibly proud of this software.

To help you discover everything QuickScore 3.2 has to offer, we have free training videos on our website, and we've put together new functionality guides like this one. We're also hosting a series of free online webinars to walk you through the new features.

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

We have more information about all of our free and paid services at <a href="https://www.spiderstrategies.com/services/">https://www.spiderstrategies.com/services/</a>

# **Strategy Maps**

#### New strategy map section

There's an entirely new section in QuickScore 3.2 called Strategy Maps. Of course, you could build strategy maps in QuickScore before, but they were called dashboards and were in the dashboards section, which isn't ideal for something so important to the balanced scorecard methodology.

Now, For the first time ever, you can completely build your strategy map perspectives, objectives, and arrows directly in QuickScore, all without needing background images.



#### Automatically generated strategy maps

When you create a new strategy map in QuickScore 3.2, you now have a choice between Automatic and Blank.

Name		
Mobileworld Strategy Map		
starting Layout		
Automatic	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.

#### Strategy map arrows

In QuickScore 3.2 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.



# Dashboards

#### Linear gauge widgets

You can now add linear gauges to dashboards. Like speedometer widgets, you can configure them in all kinds of ways, including what labels or data they show. The new linear gauges automatically adjust as you resize them, and when you make them taller than they are wide, they switch to a vertical orientation.



#### Note widgets

The new notes widget in version 3.2 allows you to see the notes for a scorecard or initiative item on your dashboard. The widget shows a preview of each note, as well as an icon showing whether there are any replies.



When you click on a note, it opens in a dialog where you can see the entire note and any replies. You can even add a reply yourself. Any notes or replies you add on a dashboard will show up in the Scorecards or Initiatives sections for that item.

bry Dashboard	
Trial User Posted: a year ago	🖍 Edit
Applies To All Time Customer Churn	
Our churn numbers got completely out of control in February. We had some ba that we're in the process of reacting to.	id press
1 REPLY	
	pot
QuickScore Administrator 2 months ago	nti me
Ok, but make sure to act quickly.	
Close	

#### **Report widgets**

You can now add reports to your dashboards as resizable widgets. Just choose an existing report in the dashboard's "add widget" menu. There are even configuration options for things like font size.

RED MEASURES REPORT			
NAME	ORGANIZATION	OWNERS	APRIL 2018
Product Costs	Financial	Joe Abercrombie	\$278,157
Total Costs	Financial		\$327,258
Pension Contribution (3%)	Financial		\$4,969
Marketing & Advertising	Financial	David Baldacci	\$99,134
Interest & Bank Charges	Financial		\$20,962

# Initiative chart widgets

Another new type of dashboard widget in version 3.2 is the initiative chart. This is the same type chart that you see on the Initiatives Overview tab, and it shows how an initiative item is progressing towards its budget and schedule goals.



#### Initiative timeline widgets

You can now add initiative timeline widgets to your dashboard, which show a Gantt-style view of your initiatives, tasks, and milestones.



#### Graphing initiatives on scorecard chart widgets

In version 3.2 you can now add initiative data to scorecard charts. In this example we have a bar graph showing our "monthly product revenue" measure. On top of that we've overlaid a line showing the percentage complete of the "migrate servers to the cloud" initiative.

We've built this example chart so that the measure values use the left axis, and the initiative values use the right. By viewing our data in this way, we can start to determine if an initiative is affecting the performance of a measure.



#### Expanded color palate

A popular feature in version 3.2 is the new color palate. We originally designed charts and text to not be able to use colors like reds, yellows, or greens because those colors can be misinterpreted as showing performance. We've listened to your feedback, though, and we now let you color your text and charts using a much wider variety of colors.



**Old Color Palate** 

**New Color Palate** 

#### Removing chart X and Y axis labels

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



Here we've turned off the Y axis.



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

	RED MEASURES REPORT	•		
	 NAME	ORGANIZATION	OWNERS	MAY 2018
Financial	Product Revenue	Financial	Nora Roberts	\$50
	Product Costs	Financial	Joe	¢270K

#### Manually setting chart Y axis min and max

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



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

Set Y axis	range				
	Мах				
	200000	\$ -			
		Y-AXIS LEFT			0
	<b>Min</b> Auto	\$ -	X-AXIS IS AUTO GENERATED		Dec 2017
Cancel				Done	

That creates a chart that looks like this.



# Better single-period chart labels

In this example we're showing book revenue, training revenue, and product revenue for four months.



In previous versions of QuickScore, if you were to change the chart to only show data for March 2018, it would show only those three bars, but it would continue to have just the one label underneath them showing the month.



In 3.2, charts now show labels for the individual bars when a single period is showing.



# Custom chart labels

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



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

<b>BOOK</b> R	REVENUE				•
ා Boo Mob	<b>bk Revenue (Actual Value)</b> ileworld Inc.	<u>hange</u>			
NAME	Scorecard Item Name 🔻			COLOR	•
CDADU	Scorecard Item Name 🗸				
GRAPH	Organization Name	<b>•</b>	IRENDLINE	AXIS ON RI	GHI
	Series Name				•
	Custom				
PRODU	CT REVENUE	J			•

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



#### Resizing widgets to specific dimensions

In QuickScore 2 you could make dashboard widgets the same size by selecting multiple widgets and then resizing one of them. This wasn't very intuitive, so we didn't keep this functionality when we developed version 3.

In version 3.2 the ability to make multiple widgets the same size is back, and it's better than ever. You can now choose "size" in every 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.



# Locking dashboard widgets

In QuickScore 2 there was a shared image library that was maintained in the Administration section. Users could then choose one of those images to use as a background image on their dashboards.

In version 3, it's much simpler to add images to dashboards. You can upload images directly to each dashboard using image widgets, or you can just drag and drop a file from your desktop. And, 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.

The only problem with this new approach is that if you aren't careful, you can accidentally move your background image as you're editing other widgets. In version 3.2 we've solved this problem by adding the ability to lock any dashboard widget in place.



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.

#### Align dashboard widgets

You can now 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.



#### Hyperlinks in text widgets

You can now add hyperlinks to other websites inside of text widgets. Just select whatever text you want to use for the link, click the hyperlink button, and type the address of the website you want to link to.

● - B / <u>U</u> 18 - <b>Ξ</b>	
If you have any problems reservation, please contact	URL https://mysupport.com
service department.	Cancel

# **Scorecards**

#### Exploring the data behind measure calculations

It's now easy to see what numbers go into a calculated measure value. Equations can be very complex, and 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, the software is easier to use than ever. The only thing that has changed is that you can hover your mouse over a number to see how it was calculated.

On the Scorecards Overview tab there has always been an "Actual and Threshold Values" table that shows you all of the measure values and thresholds that go into the currently selected measure, regardless of whether those values are calculated or not. In version 3.2 you can now interact with these numbers to see where they come from.

In this example, we're looking at a monthly measure in quarterly mode. The measure'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.



Again, nothing new, but here's where it gets interesting. 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 measures.



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 measure references. When you hover over individual parts of the equation, there's a tooltip telling you the name of that measure, and its corresponding actual value is highlighted below.

nue	2,000	0
nue	Data Used in Calculations	
e 2	ACTUAL VALUE EQUATION	Q3 201
istom nue p	Any missing valu Number of Customers plank (M(935) + M(936) + M(937)) / M(1315)	1
ility erhea	APRIL 2018 ACTUAL VALUES	3,0
	(908K + 900K + 44K) / <b>594</b> = 3,118	2,5
city	Close	2,0

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

Instead, we'll edit our original measure 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 measure,

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.



What's happening is that we changed the way the measure's quarterly value is calculated when we changed the calculated aggregation type. The software's layout in version 3.2 now reflects that.

As we saw earlier, this measure'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 measure's monthly values and then averaged them. The "use equation" aggregation type does things in the opposite order. It first calculates the quarterly values for every measure referenced in the equation, and then plugs those values into the equation.

Long story short, this measure's monthly values aren't actually 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 measures in the equation have first been aggregated on their own, because their Quarter 2 values are used in the equation.

t Revenue	2,000 0-0-0	
g Revenu	Data Used in Calculations	
evenue	ACTUAL VALUE EQUATION: AVERAGE REVENUE PER CUSTOMER	<b>Q3</b> 2016
r of Custo Revenue	Any missing valu Number of Customers blank (M(935) + M(936) + M(937)) / M(1315)	e
ofitabilit les Overh	QUARTER 2, 2018 ACTUAL VALUES	H
sses	(918K + 2.69M + 132K) / <b>2,120</b> = 1,765	
l Capacit	Close	

# Choosing "this measure" for calculated measure equations

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

RESENT	ATION	Description
2) s E c	Select a Measure	
с П г	Q Find	Q Find
DATA	Mobileworld Inc.	O This Measure
<b>∷</b> s	Key Measures	E Mobileworld Balanced Scorecard
<b>1</b>	Financial	Financial
0	Marketing	Customer
	Customer Support	Internal Processes
	Sales	Organizational Capacity
	Operations	
	Information Technology	
	Human Resources	
	Commercial	
	Cancel	Done

# New geometric mean aggregation type

There's a new measure aggregation type called geometric mean. It's a way of calculating the average of multiple numbers that is used in various statistical models. The technical definition of geometric mean is the n<sup>th</sup> root of a product of n numbers.

In practice, the math is fairly simple. With the "average" aggregation type, three numbers are aggregated using (a + b + c)/3. For geometric mean, the equation is  $\sqrt[3]{a * b * c}$ .

Scoring Type	Calendar		Data Type	
n Goal/Red Flag 🔹	Monthly	•	(§) Currency	•
Aggregation Type	Decimal Precision		Currency	
√ Geometric Mean -	Default	•	Default	•
+ Sum				
🖙 Average				
✓ Geometric Mean	Red Flag		Goal	
▷I Last Value (already aggregated)	🗹 Manual	•	🗹 Manual	•
	450.000	Ś	465.000	Ś

#### Automatically rolling up measures across organizations

There is a new measure update type called "rollup." It automatically aggregates the measure values from children organizations that are based on the same organization template.

To set up these automated rollup measures, first create an organization that you want to use as your template. Any measures in the template that you want to be automatically calculated should have the update type of "rollup." You also can change the rollup equation, which determines how the measure values will be aggregated together as they're rolled up the organization tree.

🛱 Rollup Template	Example	Product Revenue		☆   0   0
PERSONAL	Q Find	Overview Measures		Edit May 2018 👻 < >
요 Home ☆ Bookmarks	+ New Scorecard Item	MEASURE DETAILS		
PRESENTATION	Financial Profit and Loss	Scoring Type	Calendar	Data Type
Strategy Maps	Revenue	Goal/Red Flag 👻	Monthly -	⑤ Currency  ▼
Dashboards	O Product Revenue	Manual Aggregation Type	Rollup Equation	Decimal Precision
🕒 Charts & Reports	Training Revenue	+ Sum -	+ Sum 👻	Default 👻
Briefings	Book Revenue	Currency		
DATA	<ul> <li>Total Revenue</li> </ul>	Default -		
Scorecards	Cost of Sale			
<ul> <li>Initiatives</li> </ul>	O Product Costs	SERIES		
Documents	<ul> <li>Training Venues</li> </ul>	Actual Value	Red Flag	Goal
	Book Production	+ Rollup +	🗹 Manual 👻	🗹 Manual 👻
	<ul> <li>Total Costs</li> </ul>	Any missing value makes entir 👻	450,000 \$	465,000 \$
	Gross Profit			

Once you've created your organization with rollup measures, 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 measures in the organizations at the bottom of the organization tree. The measures in the organizations higher up the tree will automatically have calculated values based on the measures 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)	2
APRIL 2018 ACTUAL VALUES	
sum(\$476K,\$448K,\$444K <b>\$449K</b> ) = \$1.82M	
Close	

By hovering over the different parts of the equation, we can see that this highest-level measure is the sum of the measures 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 rollup equation skipping the middle level of the tree and going directly to the lowest level?

That's on purpose. For "sum" 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" 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 for rollup measures

Rollup measures are aggregated in two different ways. The 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.

		Data Type	
60al/Red Flag	- Monthly	▼ ③ Currency	•
Aggregation Type	Rollup Equation	<b>Decimal Precision</b>	
🖙 Average		▼ 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 measure called "Number of trucks out of service" that will track the number of broken trucks. We'll also make it a rollup measure and build out a multi-level templated organization structure that matches our company.

So, we have a rollup measure that takes the number of broken trucks and aggregates them up the org tree. What should the 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 measures over time? That's a little trickier. Let's say each of the cities update their measure with a new value every week. What should each city's measure 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 update the measure, the higher the yearly value will be.

For this measure, 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 measure 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 measure every week, and the software takes care of the rest.

And that's why there are two different ways to aggregate rollup measures. There are situations like our example above where the measure value should be summed up the rollup tree but averaged over time.

#### Editing start and archive dates on templated copies

You can now edit a templated copy of a scorecard item and override the template's start date or archive date. This is useful when organizations share the same template, but they want to track slightly different things.
Land Los Filter for it	ems to edit, then click	the Mass Edit button.	For example, this report shows a
Advanced Options			
Start And Archive Dates			
Override Template	•		
Use Template			
C Override Template	~		
Starts On	31	Archives On	31
Cancol			Dono
Calleet			Done

#### Using non-measure scores in equations

In version 3.2 you can now use scores from any type of scorecard item in measure equations. In the past you were limited to only using measure scores. This is helpful when tracking the overall strategic performance of lower-level scorecards.

M(1379) + S(114	85)	
ltem	Period	
stomer Satisfaction	Current -	Add
	M(1379) + S(11) Item Istomer Satisfaction	M(1379) + S(1185) Item Period Istomer Satisfaction Current -

#### Using initiative days elapsed in measure equations

You can now reference in measure equations how many days have passed since an initiative started. The syntax is the same as referencing other initiative fields: I (DE, XXX) where XXX is the initiative item ID.

nue				_
nue	Set Equation			
	Actual Value	1378) + M(1379) + I(DE,8017)	allowed input: +	*/()
ses	Туре	Initiative	Calculation	
ofit	Initiative 👻	(8017) Migrate Servers to Cloud	Days Elapsed 👻 Add	
	Cancel			one
		Actual Value Calculated	Red Flag     Manual	

# Initiatives

#### Initiatives timeline tab

One of the biggest new features in version 3.2 is the new Timeline tab in the Initiatives section. It shows you a fully interactive Gantt chart view of the current organization's initiatives.

🛱 Mobile <	Build a SEO Capability	☆   0   C
PERSONAL	Overview Timeline	Edit
숫 Bookmarks	Q Find )17 May 1, 2018	Jan 1, 2019
PRESENTATION	E Migrate Servers to Cloud	95%
Dashboards	E Build a SEO Capability	85.6%
🕒 Charts & Reports	Research project and write a 1	
Briefings	Status Update to Board     ·	
DATA	Develop a web marketing tes	85%
Scorecards		
Initiatives		
Documents		
Q ✿ ◀	* ₩ Expand All	>

Just like everywhere else in QuickScore, 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.

🛱 Mobile <	Build a SEO Capability							公	00
PERSONAL	Overview Timeline								Edit
☆ Bookmarks	Q Find		Jan 1, 2018	Feb 1, 2018	Mar 1, 2018	Apr 1, 2018	May 1, 2018	May 29, 2018	Jul 1, 2018
PRESENTATION	Ξ Migrate Servers to Cloud								
Dashboards	Build a SEO Capability	•						_	
🕒 Charts & Reports	<ul> <li>Research project and write a</li> </ul>		4						
Briefings	Status Update to Board		4						
DATA	Oevelop a web marketing tea								
E Scorecards									
<ul> <li>Initiatives</li> </ul>									
Documents									
५ 🗢 🤞	>∃ Collapse All				• (	+	Ø		

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.



### Exploring the data behind initiative status updates

We've refined the Initiatives Overview tab to make it absolutely clear where each initiative's status update data is coming from. Some initiatives are manually updated. Other initiatives are automatically calculated. It's now easy to tell the difference.

For example, this is what the historical performance chart looks like when an initiative's status has been updated manually. There's an "Add Status Update" button in the upper right corner, and you can click a toggle to change from viewing the "graph" to seeing "status updates."



When an initiative's status hasn't been manually updated and it's instead automatically calculated from its descendant initiative items, the historical performance chart looks a little different. The "status updates" toggle now says "calculated status updates," and there's no longer an "add status update" button.



When you switch the toggle to "status updates" for a manually updated initiative, this is what you see. On the right there are options to add a comment, and you can also edit or delete each status update. On the bottom you can add a new status update.

HISTORICAL PERFORMAN	GRA	PH STATUS UPDATES	
DATE	PERCENT COMPLETE	BUDGET SPENT TO DATE	
Mar1,2018	2%	\$1,000	戸 / 面
May 1, 2018	6%	\$4,000	
Jul 1, 2018	11%	\$10K	
Sep 1, 2018	35%	\$24K	
Nov 7, 2018	50%	\$45K	
Dec 7, 2018	70%	\$80K	
Jan 7, 2019	83%	\$110K	
Feb 25, 2019	95%	\$140K	F / 🗇
+ Add Status Update			

When the initiative's status is automatically calculated from its descendants, this view is different as well. There's no way to edit or delete the status values because they're automatically calculated. It does allow you to add a manual status update on the bottom, but there's now a warning that it will override all of the calculated values.

HISTORICAL PERFORMAN	CE GRAPH CALC	ULATED STATUS UPDATES	
DATE	PERCENT COMPLETE	BUDGET SPENT TO DATE	
Apr 7, 2017	4.1%	\$11.5K	9
Apr 30, 2017	8.9%	\$31.5K	9
May 4, 2017	9.9%	\$41.5K	Ð
Jun 14, 2017	10.8%	\$46.5K	9
Jul 14, 2017	13.7%	\$61.5K	9
Aug 14, 2017	28.1%	\$112K	9
Sep 14, 2017	52.1%	\$262K	9
Oct 14, 2017	85.6%	\$332K	9
+ Add Manual Status U	odate (this will override all calculated val	es)	

## Indicator for projected initiative end-dates

QuickScore 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 now 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.



### Better labels for completed initiative items

When an initiative item is 100% complete, its "Projected End Date" now just says "End Date." This is one of dozens of small refinements in QuickScore 3.2.



# Reports

### New report writer flow

We've redesigned the report writer flow to be more intuitive and flexible. Instead of choosing filters first, we've focused on what you want your report to look like. Now the first step is choosing columns.

The first step in creating a report is your report as a column header.	s to choose which columns you want to see. Every sco	precard item field you choose below will be included in
BASICS	MEASURES ONLY	PERFORMANCE
Name	Measure Frequency	Color
⊙ Id	<ul> <li>Updaters</li> </ul>	Score
O Description	Data Type	Period Specific Notes
Scorecard Item Type	<ul> <li>Aggregation Type</li> </ul>	<ul> <li>Measure Value</li> </ul>
Organization	<ul> <li>Scoring Type</li> </ul>	Thresholds
Scorecard	O Update Type	💿 Goal
Owners	Equations	Variance To Goal
Weight		% Variance To Goal
Tags		% Toward Goal
<ul> <li>General Notes</li> </ul>		

We've also reorganized this column selection step to group columns into basics, measures only, and performance.

If you choose any performance columns, the next step is choosing which calendar periods you want to show for those performance values.

	Report Writer: Choose Calendar Period Columns
	Because you chose a performance column in the previous step, you now can choose which calendar period columns to show in your report.
	CHOOSE A CALENDAR PERIOD
	FROM 3 Periods Earlier - TO Current Period -
Γ	Show Abbreviated Values
	Cancel Back

The final step is choosing filters. This is what it looks like when you haven't added any filters yet.

The last step is to choose which sco adding row filters. Without any filte scorecard item across all organization	recard items you want to show in your repo rs, your report would show a row for every ons.	rt by
You can filter on just about anythin	g, but some examples are:	
<ul> <li>Specific scorecard items: For example, only items w</li> <li>Data type: For example, only perc</li> <li>Color: For example, only items percent for example, only items percent for example.</li> </ul>	nple, only items in two specific scorecards th "research" in their names entage metrics rforming in the red	
CURRENT FILTERS		+ Add
Your report nee	ds to have at least one row filter.	

When you click the "add" button, you can choose a filter to add. Here we've selected "data type" and then checked "currency."

showing rows for scorecard items that match	This will limit your report to only your filter.
Some types of row filters have calendar period calendar period range you choose for column from column ranges, your reports can be mud show the current performance of all metrics for	d ranges. These are different from the s. By keeping row filter ranges separate ch more flexible. For example, you can that were red at any point in the last year.
ter On	
bata Type	
Standard	
Percentage	
<ul> <li>Currency</li> </ul>	

After clicking "done" we can see the filter we added, and we're able to click the "get report" button.

The last step is to choose which scorecard items adding row filters. Without any filters, your rep- scorecard item across all organizations.	you want to show in your report by ort would show a row for every
You can filter on just about anything, but some	examples are:
<ul> <li>Specific scorecard items: For example, only ite</li> <li>Name: For example, only items with "research</li> <li>Data type: For example, only percentage metr</li> <li>Color: For example, only items performing in t</li> </ul>	ms in two specific scorecards " in their names cs he red
CURRENT FILTERS	+ Ad
Data Type: is : Currency	

# New initiatives report

The initiatives report is back in version 3.2, and it has a similar flow to the scorecards report writer. The first step is to choose a row filter.

erview Report		
Initiatives Repor	t	
Choose which initiativ You need to add at lea every initiative item a	ve items you want to show in your report by adding row f ist one filter because otherwise your report would show cross all organizations.	ïlters. a row for
CURRENT FILTERS		+ Add
Yo	ur report needs to have at least one row filter.	
Show Abbreviated V	/alues	
Cancel Back	⊘—2	Finish

In this example we'll add an "archived status" filter of "not archived."

w -	Pension Contribution (3%)	Financial
Initiatives Repor	t: Add Row Filter	
Choose something the showing rows for initi	at you want to filter on. This will limit your ı ative items that match your filter.	report to only
Filter On		
Archive Status		•
Not Archived		•
Cancel		Done
_		_

And here's our initiatives report showing all initiative items that aren't archived.

^	Initiatives	Repo	ort										
ME L	Overview												Edit
☆ view	NAME	ID	TYPE	DESCRIPTION	RELATED ITEMS	ORGANIZATION	ASSIGNED USERS AND GROUPS	BUDGET SPENT TO DATE	TOTAL BUDGET	START DATE	DUE DATE	COMPLETION DATE	IS ARCHIVED?
	Migrate Servers to Cloud	8017	Initiative	Migrating to the cloud will save us not only money, but a significant amount of time. Risk: Customer data leakage, corruption, or unavailability. Scope: This covers internal email and application hosting servers.	Improve Customer Satisfaction Improve Anowledge and Skills Improve Sales Targeting Increase Revenue	Mobileworld Inc.	Sam Smith Trial User	\$4,000	\$150K	2018- 02-01	2019- 07-01		No
a ⇔ +	Build a SEO Capability	17	Initiative	Over the next 18 months build our Search Engine Optimization (SEO) capability utilizing a mix of internal and external resources.	Improve Customer Retention Improve IT Effectiveness Improve Market Awareness Improve Marketing Output	Mobileworld Inc.	Trial User	\$332K	\$365K	2017- 01-01	2019- 02-28		No

#### New measure comparison report

The measure comparison report was a popular feature in QuickScore 2, and now it's back with new functionality in version 3.2. It's used to compare organizations that have similar measures.

The first screen 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.

CHOOSE ORGANIZATIONS	SELECTED ORGANIZATION	S		\$44
Q Find	Northeast	(j)	this organization 👻	\$25
Sales	Southeast	$(\mathbf{i})$	this organization 👻	
Operations	Northwest	(j)	this organization 👻	341.
	Southwest	(j)	this organization 👻	\$75
<ul><li>Commercial</li><li>Rollup Template Example</li></ul>			only descendants this organization and it:	s children
<ul> <li>East Coast</li> <li>Northeast</li> <li>Southeast</li> <li>West Coast</li> <li>Northwest</li> <li>Southwest</li> </ul>			this organization and it:	s descenda 542 56.3 540.

Once you've selected your organizations, the next step is to choose your measures. Here I've selected the scorecard root, which will automatically include all of the measures.

CHOOSE KPIS	SELECTED SCORECARD ITEMS	Ξ
Q Find	Financial Profit and Loss	~
✓ 👯 Financial Profit and Loss	- 1	
> 🖸 Revenue		
> Cost of Sale		
> Gross Profit		
> Operating Expenses		
> 🖸 Net Operating Profit		
	-	

When we're done we see a report with all of the measures 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

# New owner/updater report

The owner/updater report is back in version 3.2. The first step is to choose a scorecard item, and here we're choosing an entire scorecard.

Select Scorecard Item	
Show descendants of linked items	
Q Find	Q Find
Mobileworld Inc.	Financial Profit and Loss
Key Measures	> C Revenue
Financial	> Cost of Sale
Marketing	> 🖸 Gross Profit
Customer Support	> Operating Expenses
Sales	>  Net Operating Profit
Operations	
Information Technology	
Human Resources	
Commercial	
Cancel Back	⊘—2 —3 Next

Next you choose what you want the report to show.

CHOOSE USERS OR GROUPS
Any User Or Group
O Specific Users Or Groups
CHOOSE THE DATA TO VIEW
Responsibility Type
Owners or Updaters 🔹
Include Measures Only

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

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

# Adding "or" filters to reports

QuickScore 3.2 has the powerful new ability to add "or" filters to reports. Here's an example of how they work.

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

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

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

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

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

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

Scorecard Item Own		
	Report Writer: Add Row Filter	
Generation Measure Comparison		
Financial Overview R	Choose something that you want to filter on. This will limit your report to only	
🗳 Sales Overview Repo	showing rows for scorecard items that match your filter.	
Marketing Overview	Filter On	Color: is Bad in Current Period
HQ Scorecard	Performance Trend -	
Scorecard Structure		
	Trend	
	downward 👻	
		-
	CHOOSE A CALENDAR PERIOD	
	CALENDAR Current Calendar 👻	
	FROM 1 Period Earlier - TO Current Period -	
	Add To Evicting Eiltor &r An OP	
	Add to Existing Filter As An OK	t Period.
	Done	

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

-	SAL FILD	Overview	Edit
] Home	+ New Report	C) New Colder	2018 - < >
Bookmarks	😂 Red Measures Report	Report Writer: Add Row Filter	
Strategy Maps	Scorecard Item Owne		
Dashboards	Measure Comparison	Choose something that you want to filter on. This will limit your report to only showing rows for scorecard items that match your filter.	
Charts & Reports	Financial Overview R		
Briefings	Sales Overview Repo	Filter On	+ Add
UTA .	Marketing Overview	renormance menu	Color: Is Red in Current Period
3 Scorecards	HQ Scorecard	Trend	NAMES TO PERSON AT SAMPLED TO PERSON
] Initiatives	Scorecard Structure	downward 👻	/ Edit
Documents		CHOOSE A CALENDAR PERIOD CALENDAR Current Calendar	
		FROM 1 Period Earlier - TO Current Period -	
		Add To Existing Filter As An OR	
			/ Edit
		CHOOSE A FILTER	t Period.
		Scorecard Item Type: is Measure Color: is Red in Current Period	
		Cancel Done	

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



#### And here's our new report.

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

#### Editing multiple scorecard items at once

One of the largest new features in version 3.2 is the ability to edit multiple scorecards at once. This mass-edit feature is built into the Report Writer, and it can save you a lot of time.

In this example we're going to find all of the red measures and then assign our helpdesk team as their owners. The first step is to create a new report showing all measures that are red for the current period. Before we save the report, we can now see a "Mass Edit" button on the bottom of the screen.

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

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

Ô	Mobileworld Inc. <	Report Writer			
ME	Q Find	Overview		Edit	May 2018 👻 < >
⊻ \$	+ New Report D New Folder	NAME	ORGANIZATION	OWNERS	MAY 2018
VIEW	🗳 Red Measures Report	Product Revenue	Financial	Nora Roberts	\$50
	🗳 Report Writer	Product Costs	Financial	loe Abercrombie	\$279K
G	🐣 Red Measures Report	V Frontee costs	Thanciat	SOCADETEIONDIE	\$210K
ш	🗳 Scorecard Item Owner/Updater Report	✓ Total Costs	Financial		\$327К
DATA	🗳 Measure Comparison Report	Pension Contribution (3%)	Financial		\$7,438
::	Financial Overview Report	Marketing & Advertising	Financial	David Baldacci	\$63K
	<ul> <li>Marketing Overview Report</li> </ul>	✓ Interest & Bank Charges	Financial		\$15.6K
	🗳 HQ Scorecard	✓ Office Rental	Financial	Brandon Sanderson	\$51.6K
	Scorecard Structure Report	✓ IT & Communications	Financial		\$35.9K
		✓ Travel	Financial		\$15.5K
		✓ Twitter Mentions	Marketing		0
		Facebook Likes	Marketing		266
		✓ % Calls answered	Customer Support		91.9%
০ ✿		Customer Satisfaction Survey	Customer Support	Clive Keyte	89.1%
•	Y∃ Expand All ✓ Edit	You haven't saved this report yet		Edi	it Selected Items Done

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

D New Folder				
w Report	Edit Selecte	ed Items		OWNERS
iort iport	To make char enter the new	nges to all selected scorecard items, select a field to change, v value, and select Save.		er
w Report	CHANGE	Owners	•	
re Report	ACTION	Add the following owners	•	r r
	OWNERS	IT Support (Communication Users)	1	
	Start typing	•		
	Cancel		Save	
		1.0.00		

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

Ô	Mobileworld Inc. <	Repo	ort Writer				
	Q Find	Over	view		Edit	May 2018 👻	< >
∑ ☆ view	+ New Report D New Folder	110 o Your I show	bjects successfully modified. report hasn't been updated yet to show the ch the latest data.	anges you just made. When yo	u're done editing, click I	Done to refresh the rep	ort and
٢	🗳 Red Measures Report		аме	ORGANIZATION	OWNERS	MAY 2018	
ш	Scorecard Item Owner/Updater Report		Product Revenue	Financial	Nora Roberts	\$50	
DATA	<ul> <li>Measure Comparison Report</li> <li>Financial Overview Report</li> </ul>		Product Costs	Financial	Joe Abercrombie	\$278K	
	😂 Sales Overview Report		Total Costs	Financial		\$327K	
C	Marketing Overview Report		Pension Contribution (3%)	Financial		\$7,438	
	<ul> <li>HQ Scorecard</li> <li>Scorecard Structure Report</li> </ul>		Marketing & Advertising	Financial	David Baldacci	\$63K	
			Interest & Bank Charges	Financial		\$15.6K	
			Office Rental	Financial	Brandon Sanderson	\$51.6K	
			IT & Communications	Financial		\$35.9K	
			Travel	Financial		\$15.5K	
Q			Twitter Mentions	Marketing		0	
⇔							
•	*∃ Expand All 🖍 Edit ◀	🧃 You H	naven't saved this report yet		Ed	it Selected Items	Done

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

Ô	Mobileworld Inc. <	Report Writer			
ME	Q Find	Overview		Edit May 2018	- <>
오 ☆	+ New Report 🗅 New Folder	NAME	ORGANIZATION	OWNERS	MAY 2018
VIEW	Red Measures Report Report Writer	Product Revenue	Financial	Nora Roberts Help Desk & IT Support (Communication Users)	\$50
C S	Red Measures Report	Product Costs	Financial	Joe Abercrombie Help Desk & IT Support (Communication Users)	\$278K
	Scorecard Item Owner/Updater Report Measure Comparison Report	Total Costs	Financial	Help Desk & IT Support (Communication Users)	\$327K
DATA	🗳 Financial Overview Report	Pension Contribution (3%)	Financial	Help Desk & IT Support (Communication Users)	\$7,438
Ø	Sales Overview Report Marketing Overview Report	Marketing & Advertising	Financial	David Baldacci Help Desk & IT Support (Communication Users)	\$63K
U	HQ Scorecard	Interest & Bank Charges	Financial	Help Desk & IT Support (Communication Users)	\$15.6K
	Scorecard Structure Report	Office Rental	Financial	Brandon Sanderson Help Desk & IT Support (Communication Users)	\$51.6K
		IT & Communications	Financial	Help Desk & IT Support (Communication Users)	\$35.9K
		Travel	Financial	Help Desk & IT Support (Communication Users)	\$15.5K
		Twitter Mentions	Marketing	Help Desk & IT Support (Communication Users)	0
0		Facebook Likes	Marketing	Help Desk & IT Support (Communication Users)	266
*		% Calls answered	Customer Support	Heln Desk & IT Sunnort (Communication Users)	01 004
•	Y∃ Expand All 🖍 Edit ◀	You haven't saved this report yet		Mass Ed	lit Save

# Sorting report columns

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

NAME	ORGANIZATION	OWNERS	MAY 2018
Product Revenue	Financial	Nora Roberts	\$50
Product Costs	Financial	Joe Abercrombie	\$278K
Total Costs	Financial		\$327K
Pension Contribution (3%)	Financial		\$7,438
Marketing & Advertising	Financial	David Baldacci	\$63K
Interest & Bank Charges	Financial		\$15.6K

Here we've clicked on the Name column, and it sorts by Name ascending.

NAME ^	ORGANIZATION	OWNERS	MAY 2018
% Calls answered	Customer Support		91.9%
% Problems resolved within a day	Information Technology		88.8%
% Time spent at client location	Operations	Joe Abercrombie	40.2%
Average client training feedback score	Operations		74.9%
Close ratio	Sales	Trial User	27.4%
Contract management risk index	Commercial	Joe Abercrombie	11.4%

Clicking on the Name column again switches the sort order to descending.

NAME ~	ORGANIZATION	OWNERS	MAY 2018
West Coast Travel	West Coast		\$20K
West Coast Training Venues	West Coast		\$39.6K
West Coast Total Operating Expenses	West Coast		\$496K
West Coast Total Costs	West Coast		\$325K
West Coast Sales & General Admin	West Coast		\$84.5K
West Coast Salaries & Wages	West Coast		\$396K

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

NAME	ORGANIZATION	OWNERS	MAY 2018
Product Revenue	Financial	Nora Roberts	\$50
Product Costs	Financial	Joe Abercrombie	\$278K
Total Costs	Financial		\$327K
Pension Contribution (3%)	Financial		\$7,438
Marketing & Advertising	Financial	David Baldacci	\$63K
Interest & Bank Charges	Financial		\$15.6K

# Adding new columns to reports

There are now 6 additional fields you can add to report writer reports.

- Thresholds
- Goal
- Variance to Goal
- % Variance to Goal

- % Toward Goal
- Year to Date (YTD)

The first step in creating a report is your report as a column header.	to choose which columns you want to see. Every sco	recard item field you choose below will be included in
BASICS	MEASURES ONLY	PERFORMANCE
Name	Measure Frequency	<ul> <li>Color</li> </ul>
⊙ Id	O Updaters	Score
O Description	O Data Type	Period Specific Notes
Scorecard Item Type	Aggregation Type	Measure Value
Organization	Scoring Type	<ul> <li>O Thresholds</li> </ul>
Scorecard	O Update Type	🧿 Goal
Owners	O Equations	<ul> <li>Variance To Goal</li> </ul>
Weight		<ul> <li>% Variance To Goal</li> </ul>
Tags		<ul> <li>% Toward Goal</li> </ul>
<ul> <li>General Notes</li> </ul>		YTD YTD

# Home

#### Embedding YouTube video in welcome message

You can now embed a YouTube video on your Welcome page. This can be one of the Spider Strategies introductory training videos, or a customized video you make for your users.

To get started, just click the Edit button in the corner of the welcome message. You can then paste in the video's YouTube URL and click Save.

PERSONAL	Home	WELCOME MESSAGE	
<u> </u>	Welcome		
숬 Bookmarks	Alerts		
PRESENTATION	My Tasks	This is the Welcome Screen for your users! It is also your personal	Spider Strategies
Charts & Penorts	My Measures	staying on top of your Responsibilities, which are all listed below.	Strategies
	Measure Updates	For help getting	Upload Logo
		started: https://balancedscorecards.com/learn/#scorecard-build	Delete Logo
Scorecards		YouTube video URL (optional) https://www.youtube.com/watch?v=EeKbftzVfJ	I
<ul> <li>Initiatives</li> </ul>			
🕒 Documents		Cancel	Save
		NEW ALERTS YOUR RESPONSIBILIT	IES
		No New Alerts Measures I Own You own 0 Measures.	
		Measures I Update You update 0 Measure	s.
୦.¢ ଏ		My Tasks You have 0 Tasks that	haven't been completed.

Your users will now see the video's title, description, and thumbnail underneath the welcome message.

PERSONAL	Home	WELCOME MESSAGE			🖉 Edit
යි Home	Welcome				
☆ Bookmarks	Alerts	This is the Welcom "mission control ce	e Screen for your users! It is a enter" for viewing your perform	lso your personal Spid	er tegies
	My Tasks	staying on top of yo	our Responsibilities, which are	e all listed below.	
Charts & Reports	My Measures	For help getting sta	arted: https://balancedscored	ards.com/learn/#scorecard-build	
Briefings	Measure Updates		Spider Strategies - TriNet Client TriNetHR • YouTube		
DATA					
Scorecards					
Initiatives		NEW ALERTS		YOUR RESPONSIBILITIES	
Documents		No	New Alerts	Measures I Own You own 0 Measures.	
				Measures I Update You update 0 Measures.	
				My Tasks You have 0 Tasks that haven't been completed.	
				QUICKSCORE SUPPORT	
Q 🏟 🖪		4		🥥 We're here to help	

When you click on the video, it will play in a dialog.



# Support link on the Welcome page

There's now a support link on the Welcome page.



When your users click on the Contact Us button, it opens a dialog where they can write a support message. It shows their name and email on top so they know who the message is being sent from.

QuickScore Support	TriNetHR •YouTube
Name QuickScore Administrator	Email quickscore-notifications@spiderstrategies.com
Message	
Write your message	
Cancel	Send

You can configure who receives the support email in the Application Administration section. If you leave the email blank, it won't show the support section at all on the Welcome page.

Settings	Require Note When Updating Measures That Have A Score Less Than
PERSONAL	
Account Info	Prevent Scorecard Item Changes This Many Days After
Alert Preferences	Archive Date
Broadcast Alert	
SETUP	Send Support Request Emails To
Calendars	you@whatever.com
SECURITY	Year-To-Date Calendar
Users	Yearly
Groups	Show Welcome Message
Shared Dashboards and Strategy Maps	Yes 👻
CONFIGURATION	
Application Administration	AUTHENTICATION SETTINGS
Server Administration	Authentication Type
Database Connections	QuickScore
L'anna Managamant	
4	Cancel

# Alerts

#### Redesigned alert emails

We've redesigned alert emails to be much more cleanly formatted. There's even an unsubscribe link on the bottom to quickly change your email notification preferences.



# Sending broadcast alerts

There's a new Broadcast Alert page in the Administration section where you can send instant alerts to any or every user, group, or group type in the software. There's also a "send in popup" checkbox that that will instantly show your alert in a popup message to any of the recipients who are logged in.

ME	Settings	BROADCAST ALERT	
<u>र</u>	PERSONAL		
শ্ব	Account Info	You can send a message to users by adding them to the list below	w. They'll receive the message you write as an alert.
VIEW	Alert Preferences		
•'	Broadcast Alert	Hey, power users (and Brandon)! We're going to be presenting our numbers to the board on Friday, so be sure to get everything	All Power Users Brandon Sanderson
	SETUP	updated by then.	
с ш	Calendars		
DATA	SECURITY		
::	Users	Send notification in a popup	Cancel Send Broadcast Alert
$\checkmark$	Groups		
ß	Shared Dashboards and Strategy Maps		
	CONFIGURATION		
	Application Administration		
	Server Administration		
Q	Database Connections		
<b>⇔</b> ►	4		

#### Alerting initiative owners of changes

When you edit an initiative, there is now a checkbox to alert assigned users and groups of the changes.

ASSIGNED USERS AND GROUPS	
View User	<b></b>
Updaters (Communication Users)	<u>ش</u>
Start typing -	
	Notify Assigned Users and Groups of Changes
G→ Move D Copy Delete	Cancel

#### System wide alerts

There are five new system-level alerts that can be turned on in the Administration section.

- Red measures without tasks.
- Red measures upon turning red.
- Measure update reminders.
- Note replied to.
- Notify owners of parents of linked items when source is modified.

ME	Settings	Г	EMAIL NOTIFICATION	DATA FORMAT
ম	PERSONAL		Red Measures Without Tasks	Default Number Precision (Decimal Places)
52	Account Info		No	1 digit (example 8.3)
	Alert Preferences		Note Replied To	Default Currency Precision (Decimal Places)
Ċ	Broadcast Alert		No 👻	2 digits (example 8.29)
ш_	SETUP		Red Measures Upon Turning Red	Display Format For Users' Names
DATA	Calendars		No	First Last (e.g. Kevin Bacon)
::	SECURITY		Measure Update Reminders	User Titles (Pipe Delimited; I.E. Mr. Mrs. Miss)
V	Users		15 days before end of period 2 days after end of period	
C	Groups		Notify Owners Of Parents Of Linked Items When Source Is	Measure Units (Pipe Delimited; I.E. Kilograms Miles Hours)
	Shared Dashboards and Strategy Maps		No	hours days minutes
	CONFIGURATION		NU	Allowed Tags (Pipe Delimited, Leave Blank To Allow Any; I.E.
	Application Administration		SCORING	Important(Highlighted)
	Server Administration		Scores Visible	Default Currency Unit
Q	Database Connections		Yes	\$ (United States Dollar, USD)
<b>₽</b>		•		Cancel

"Red measures without tasks" will send an alert to any measure owner when that measure turns red and there's not an initiative item in place to correct the measure performance. Similarly, "Red measures upon turning red" will send an alert to the measure owner when any measure turns red.

"Measure update reminders" will send out alerts to measure updaters to remind them to update their measure values when they haven't yet done so. In the example above, QuickScore will send out alerts 15 days before the period is over to help people get their data in ahead of time, as well as 2 days after to remind people who have forgotten.

"Note replied to" will alert the author of any note when it gets a new reply. "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.

#### View only users can create alerts

The "Modify Bookmarks and Personal Settings" permission for View Only groups now allows users in those groups to create alerts.

Concentration of the second			Group	Туре	
ast Alert	View Only: Advanced Permis	ssions	Select default	Unselect all	
ars	© VIEW		••• OTHER		
	View All Organizations		SQL Console (Read Only)		
	Modify Bookmarks and Personal Settings				
	Change Personal Account Info				
Dashboan					
ATION	Cancel			Done	
tion Admin	istration				

# **Exports**

# Exporting scorecard structure and values

There are two new options in the "send to" menu on the Scorecards Measures tab, both of which create exports in a format that can be used to reimport them later. The first option we'll look at is "Scorecard Import File."

Financial Profit and L	OSS			
Overview Measures ()				Send To
				Briefing
MEASURES	IAN	FFR	MAD	Printer
MEASURE	2018	2018	2018	Acrobat PDF
Product Revenue	\$122K	\$129K	\$133K	PowerPoint
Training Revenue	\$1,262	\$3,812	\$4,762	Email
Book Revenue	\$37.6K	\$36.9K	\$36. K	Excel
Product Costs	\$278K	\$278K	\$278K	Scorecard Import File
Training Venues	\$39.2K	\$38.9K	\$39.1K	• Measure Value Import File

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

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

The second option is "Measure Value Import File." This is useful when exporting and importing measure values, or for creating blank import files to be filled in with measure values manually.

#### **Financial Profit and Loss** ☆ | ₽ - | 0 C Send To Overview Measures 🕕 < > Briefing MEASURES Printer JAN FEB MAR MEASURE 2018 2018 2018 ß Acrobat PDF **Product Revenue** \$122K \$129K \$133K 6 PowerPoint \$1,262 \$4,762 **Training Revenue** 812 Ā Email **Book Revenue** ß \$37.6K \$36.9K \$38.2K Excel Scorecard Import File **Product Costs** \$278K \$278K \$278 • Measure Value Import File **Training Venues** \$39.2K \$38.9K \$39.1K

When you click on the "Measure Value Import File" option in the menu, it opens a dialog. 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.

Q. Fin				
Measure	Value Import File: Select Organiz	ations		1
s				
• Edits	ates an Excel file in the same format that we use to im your existing measure values tes your measures with new values	port measure values. You can open i	t in an app like Excel to create an import	file that:
The firs	step is choosing one or more organizations. If you wa	ant to use the current organization, j	ust click next.	
	ANIZATIONS		SELECTED ORGANIZATIONS	E
Q Fin			Financial	0
O You	Organization		Operations	0
	Aobileworld Inc.  Key Measures  Financial  Marketing  Customer Support  Sales  Operations  Information Technology  Human Resources	~	Î	
Cancel		2 2		Next
The next step has more options about what to include in the import file you're creating. You'll need to choose a start and end date, and you can choose whether to include calculated values or not. Most importantly, you'll want to choose which format you want your data to be in.

"Data in Columns" has one row for every measure, 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 measure value in a row, which means each measure 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 Connect. In this example we'll choose "Dates in Columns."

+ New Scorecard								
Financial Profit and Lot	ure Value Impo	rt File: C	Choose Da	ites		TOTAL	JAN	FEB
Cost of Sale	l create an import file w ose below. If you've cho	rith calendar	r period columnes for more that	ns matching the n one calendar,	date range you your import file	5.35M	\$126K	\$500
Gross Profit      Operating Expenses      Dates	nave one worksheet for	each caterio	101.			2.87M	\$1,262	\$300
Net Operating Profit     Start	Date 5/2/2017	31	End Date	5/2/2018	31	5499K	\$35.1K	\$400
	ude Calculated Values	5				3.34M	\$279K	\$39.5
Choose	a format Dates In Column	s		Dates In F	Rows	91.3K	\$6,920	\$7,03
	Easier to update			Includes three	esholds	\$3.9M	\$327K	\$326
						5.27M	5439K	\$435
Cance	el Back		0-0	3	Next	1.89M	₩ \$116К	\$34
	Nationa	l	\$4,872	\$4,872 \$4	,872 \$0	\$53.6K	\$0	\$8,18

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

DDEVIE	W.													
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 measures that use different calendars, your spreadsheet will have one worksheet for every calendar.

	А	В	с	D	E	F	G	н	1	L	к	L	м	N	0
1	ID	Measure	5/1/2017	6/1/2017	7/1/2017	8/1/2017	9/1/2017	10/1/2017	11/1/2017	12/1/2017	1/1/2018	2/1/2018	3/1/2018	4/1/2018	5/1/2018
2	961	Net Operat	\$84,721.0	\$82,639.0	\$84,663.0	\$86,224.0	\$84,136.0	\$83,140.0	\$84,016.0	\$80,582.0	\$73,370.0	\$78,979.0	\$79,780.0	\$72,339.0	\$69,248.0
3	962	% Net Oper	11.1%	10.9%	11.1%	11.3%	11.%	10.9%	11.%	11.3%	12.1%	11.1%	12.1%	11.9%	11.2%
4	991	% Trainer u	61%	70%	71%	71%	65%	69%	71%	76.9%	82.4%	89.3%	85.3%	78.2%	71.3%
5	992	% Time spe	38%	38%	48%	39%	42%	45%	46%	45.6%	45.4%	45.%	42.1%	38.5%	40.2%
6	993	Average clie	84%	88%	80%	86%	96%	81%	83%	85%	82.1%	81.5%	76.8%	81.1%	74.9%
7	994	Number of	18	22	20	21	22	18	24	24	23	23	22	22	22
8	995	Number of	8	12	9	8	14	15	10	10	9	8	8	9	9
9	935	Product Re	\$467,987.0	\$500,000.0	\$500,000.0	\$355,988.0	\$600,000.0	\$46,312.0	\$465,457.0	\$475,000.0	\$126,162.0	\$500,000.0	\$470,000.0	\$900,000.0	\$50.0
10	936	Training Re	\$1,546.0	\$260,093.0	\$270,000.0	\$240,496.0	\$300,000.0	\$259,857.0	\$261,030.0	\$240,000.0	\$1,262.0	\$300,000.0	\$300,000.0	\$900,000.0	\$897,100.0
11	937	Book Rever	\$6,665.0	\$39,258.0	\$100,000.0	\$38,235.0	\$40,000.0	\$38,081.0	\$48,515.0	\$45,000.0	\$35,100.0	\$40,000.0	\$30,000.0	\$44,000.0	\$42,900.0
12	940	Product Co	\$279,044.0	\$276,810.0	\$276,632.0	\$278,324.0	\$277,400.0	\$277,811.0	\$279,275.0	\$279,183.0	\$278,583.0	\$278,566.0	\$278,182.0	\$278,157.0	\$277,548.0
13	941	Training Ve	\$39,256.0	\$39,014.0	\$39,305.0	\$39,525.0	\$39,485.0	\$38,979.0	\$39,155.0	\$39,022.0	\$38,922.0	\$39,522.0	\$38,980.0	\$38,813.0	\$38,388.0
14	942	Book Produ	\$7,807.0	\$7,852.0	\$7,504.0	\$7,647.0	\$7,706.0	\$7,617.0	\$7,703.0	\$7,128.0	\$6,920.0	\$7,037.0	\$7,512.0	\$8,121.0	\$8,238.0
15	943	Total Costs	\$326,107.0	\$323,676.0	\$323,441.0	\$325,496.0	\$324,591.0	\$324,407.0	\$326,133.0	\$324,908.0	\$326,658.0	\$326,283.0	\$326,033.0	\$327,258.0	\$326,883.0
16	945	Total Gross	\$439,703	\$437,025	\$437,165	\$440,108	\$439,500	\$436,550	\$438,870	\$446,230	\$438,656	\$434,816	\$427,456	\$430,016	\$425,643
17	946	% Gross Pro	57.4%	57.5%	57.5%	57.5%	57.5%	57.4%	57.4%	57.6%	57.2%	57.8%	57.4%	57.%	56.9%
18	948	Salaries & V	\$168,000.0	\$168,000.0	\$168,000.0	\$168,000.0	\$168,000.0	\$168,000.0	\$168,000.0	\$45,523.0	\$116,330.0	\$34,041.0	\$0.0	\$0.0	\$76,548.0
19	949	National In	\$4,872.0	\$4,872.0	\$4,872.0	\$4,872.0	\$4,872.0	\$4,872.0	\$4,872.0	\$0.0	\$0.0	\$8,187.0	\$0.0	\$12,941.0	\$0.0
20	950	Pension Co	\$1,008.0	\$1,008.0	\$1,008.0	\$1,008.0	\$1,008.0	\$1,008.0	\$1,008.0	\$1,467.0	\$2,386.0	\$6,462.0	\$3,534.0	\$4,969.0	\$7,438.0
21	951	Marketing	\$51,876.0	\$51,158.0	\$51,273.0	\$51,132.0	\$52,064.0	\$51,227.0	\$51,952.0	\$61,756.0	\$81,364.0	\$47,049.0	\$83,202.0	\$99,134.0	\$62,981.0
22	952	Sales & Ger	\$30,328.0	\$29,390.0	\$29,184.0	\$29,845.0	\$29,896.0	\$29,509.0	\$29,735.0	\$5,601.0	\$0.0	\$0.0	\$10,558.0	\$29,412.0	\$18,854.0
23	953	Interest & E	\$7,419.0	\$7,390.0	\$7,401.0	\$7,402.0	\$7,395.0	\$7,400.0	\$7,386.0	\$6,349.0	\$9,649.0	\$14,740.0	\$14,740.0	\$20,962.0	\$15,588.0
24	954	Insurance	\$15,317.0	\$15,215.0	\$15,213.0	\$15,313.0	\$15,282.0	\$15,220.0	\$15,301.0	\$29,254.0	\$20,958.0	\$15,867.0	\$12,285.0	\$16,056.0	\$10,588.0
25	955	Office Rent	\$25,272.0	\$25,104.0	\$25,100.0	\$25,265.0	\$25,216.0	\$25,112.0	\$25,246.0	\$31,779.0	\$8,758.0	\$0.0	\$16,799.0	\$32,354.0	\$51,642.0
26	956	IT & Comm	\$23,029.0	\$23,092.0	\$23,076.0	\$23,048.0	\$23,081.0	\$22,918.0	\$23,023.0	\$41,727.0	\$51,371.0	\$71,536.0	\$54,001.0	\$51,663.0	\$35,882.0
27	957	Travel	\$13,310.0	\$14,703.0	\$12,923.0	\$13,452.0	\$14,032.0	\$13,685.0	\$13,795.0	\$15,662.0	\$18,377.0	\$16,171.0	\$3,954.0	\$9,214.0	\$15,492.0
28	958	Amortisatio	\$14,551.0	\$14,454.0	\$14,452.0	\$14,547.0	\$14,518.0	\$14,459.0	\$14,536.0	\$6,428.0	\$4,920.0	\$0.0	\$4,337.0	\$0.0	\$0.0
29	959	Total Opera	\$354,982.0	\$354,386.0	\$352,502.0	\$353,884.0	\$355,364.0	\$353,410.0	\$354,854.0	\$144,791.0	\$0.0	\$111,736.0	\$205,594.0	\$388,840.0	\$147,491.0

#### Emailing exports

Many pages now have an "Email" option in their "Send To..." menus.



This opens a dialog where you can type in email addresses and a message.

corecard Item	Email				
nd Loss					-
	Email Address				
	test@example.com	me@mydomain.com			-0-0
	Message To Recipient				
penses	Check out this example	e metric.			
g Profit					ct Nov D
					RELATED
	Cancel		_	OK	

QuickScore will send emails that contain a PDF export of the page, as well as a link that will take them directly to the page once they log in.

QuickS	core Mail - Total Rev	enue - April 2018	Ŧ	0	<b>i</b> <	:
a	James Peterson to m	e •		1	1:01 PN	:
		QuickScore				
	James	has sent you Total Revenue - April 2018				
		James Peterson				
		Check out this example metric.				
		• Total Revenue - April 2018				
		The PDF is attached to this email (view in QuickScore)				
	Total Revenue - April 2018					

# Exporting SQL console results to Excel

There's now a "Send to Excel" option in the SQL console.

Users	SQL CONS	OLE									E Export	
Groups	colo	at * from bistory	where actiondate > 120	17-09-01'						Send T	•	
Shared Dashboards and Strategy Maps	Bere	cc - from history	where acciondate > 20	17-09-01						Excel		
CONFIGURATION						-						
Application Administration												
Server Administration									_			
Database Connections	Clea	ir									Run SQL	
License Management												
MONITORING	QUERY R	ESULTS (13,143 results retu	rned in 297ms)									
Diagnostics	ID	ACTIONDATE	ACTIONDESCRIPTIONKEY	EXTRAINF01	EXTRAINFO2	EXTRAINF03	EXTRAINFO4	MODIFIERALIAS	OBJECTID	OBJECTNAME1	OBJECTNAME2	
Current User Activity	482123	2017-09- 05T19:06:32.000+0000	common.changed	133					936	Training Revenue		
View Log Files	482124	2017-09- 05T19:06:32.000+0000	common.changed	133					937	Book Revenue		
Background Process Status	482125	2017-09- 05T19:06:32.000+0000	common.changed	133					935	Product Revenue		
ADVANCED	402120	2017-09-	common channed	120					0.25	Product		
Recalculate All Scores	482126	05T19:07:11.000+0000	common.cnanged	138					935	Revenue		
Tree Fixer	482127	2017-09- 05T19:07:11.000+0000	common.changed	138					937	Book Revenue		
SQL Console	482128	2017-09- 05T19:07:11.000+0000	common.changed	138					936	Training Revenue		
Generate Demo Data	482129	2017-09- 05T19:50:50.000+0000	common.saved						1347490	Strategy Map		
· · · · · · · · · · · · · · · · · · ·		2017-09-										

This produces a nicely formatted Excel export of your results.

	A	В	c	D	E	F	G	н	1	
1	SQL Co	nsole								
2	select * fro	m history where actiondate >	· '2017-09-01'							
4										
5	id	actiondate	actiondescriptionkey	extrainfo1	extrainfo2	extrainfo3	extrainfo4	modifieralias	objectid	objectname1
6	482123	2017-09- 05T19:06:32.000+0000	common.changed	133					936	Training Revenue
7	482124	2017-09- 05T19:06:32.000+0000	common.changed	133					937	Book Revenue
8	482125	2017-09- 05T19:06:32.000+0000	common.changed	133					935	Product Revenue
9	482126	2017-09- 05T19:07:11.000+0000	common.changed	138					935	Product Revenue
10	482127	2017-09- 05T19:07:11.000+0000	common.changed	138					937	Book Revenue
11	482128	2017-09- 05T19:07:11.000+0000	common.changed	138					936	Training Revenue
12	482129	2017-09- 05T19:50:50.000+0000	common.saved						1347490	Strategy Map
13	482130	2017-09- 06T11:51:35.000+0000	common.created						393223	User Guide
14	482131	2017-09- 06T11:52:32.000+0000	common.created						393224	Export Image
15	482132	2017-09- 06T11:52:53.000+0000	documents.revisions.created						393223	
16	482133	2017-09- 06T13:34:43.000+0000	common.created						1355490	New Dashboard Funct
		2017-09-								

# Exporting history

There is now an Export button in all History dialogs with options for Printer, PDF, and Excel.

l Profit ar nue	Financial Profi	t and Loss Hist	tory		
t of Sale					-
ss Profit	EVENTS		Current Period All Events	🗠 Export	
rating Exp	DATE	USER	ACTION	Send To	
Operating	Nov 30, 2016	Clive Keyte	Created	Printer	
	Jan 6, 2017	Sam Smith	Added a Note for December 2016		
	Jan 12, 2017	Spider Support	Changed a Note For December 2016		
				Excel	MS
	Close				
		- Revenue	3.0	2079	relat

Each option produces a nicely formatted report of the history data. For example, this is what the PDF export looks like.

Ď	Financial_Prof	fit_and_LossApril_2018.pdf (1 p	bage) ∨	Q Search
Financia events	l Profit and	d Loss History - All	Events	
DATE	USER	ACTION	DESCRIPTION	
Nov 30, 2016	Clive Keyte	Created		
Jan 6, 2017	Sam Smith	Added a Note for December 2016		
Jan 12, 2017	Spider Support	Changed a Note For December 2016		

# Usability

# New look and feel for navigation

One of the major focuses of version 3.2 is making the software even easier to use. In this spirit, we've reordered the items in the far-left navigation pane to better reflect how they're actually used.



On the bottom is "Data," which contains Scorecards, Initiatives, and Documents. These are the low-level sections that contain your actual performance data.

Above that is "Presentation," which has sections that build on the "Data" sections and help visualize your performance. Strategy Maps, Dashboards, Charts & Reports, and Briefings are included.

At the top is "Personal," which has the Home and Bookmark sections. These are the two sections that are unique to every user and are most likely the first things you'll want to visit when using the software. The Home section is on top now, because that's what people automatically see when they first log in.

#### Improvements to edit flow

We've made a lot of improvements to how edit mode works in version 3.2. Like before, you can start editing by going to the Edit tab or clicking on the Edit button at the bottom of the tree. You can now also click the New Item button on the top of the tree. This launches you into edit mode and directly to the new item form.

Ô	Mobileworld Inc. <	Status Updat	e to Board			Å   b - 0   C
	Q Find	Overview	limeline			Edit
⊥ ☆	+ New Initiative Item	DUE DATE	Aug 29, 2017	PROJECTED SCHEDULE		
	⋮Ξ Migrate Servers to Cloud					
	∃ Build a SEO Capability					
٩	Research project and write a r					
ш	<ul> <li>Status Update to Board</li> </ul>					
	<ul> <li>Develop a web marketing team</li> </ul>				Behind schedule	
					Denna Seneaute	
<ul> <li>✓</li> <li></li> </ul>						
2 0		HISTORICAL PERFORM	IANCE			
ľ		HISTORICAL PERFORM	IANCE PERCENT COMPLETE		BUDGET SPENT TO DATE	
0		HISTORICAL PERFORM DATE + Add Status Update	ANCE PERCENT COMPLETE		BUDGET SPENT TO DATE	
Ø		HISTORICAL PERFORM DATE + Add Status Update	IANCE PERCENT COMPLETE		BUDGET SPENT TO DATE	
		HISTORICAL PERFORM DATE + Add Status Update RELATED ITEMS	ANCE PERCENT COMPLETE		BUDGET SPENT TO DATE	+ Add
0		HISTORICAL PERFORM DATE + Add Status Update RELATED ITEMS	ANCE PERCENT COMPLETE	No related	BUDGET SPENT TO DATE	+ Add
2 0 *		HISTORICAL PERFORM DATE + Add Status Update RELATED ITEMS	ANCE PERCENT COMPLETE	No related	BUDGET SPENT TO DATE	+ Add

We've also changed the appearance of edit mode to more clearly reflect that you're editing things. The tree is styled with yellow highlights, and the Done button is much more obvious.

Ô	Mobileworld Inc.	<	Status Update to Board		☆	00
	Q Find		Overview Timeline			Edit
냈	+ New Initiative Item		Name	Type		
	= Migrate Servers to Cloud	• =	Status Update to Board	Milestone		•
	⋮Ξ Build a SEO Capability	• =	Description	Due Date		
٩	Research project and write a n	• =		8/29/2017		
ш	<ul> <li>Status Update to Board</li> </ul>	•		Currency	Total Budget	
	Develop a web marketing team	• •		Default 👻		\$
::						
☑						
C			ASSIGNED USERS AND GROUPS			
			Add User or Group			
q						
<b>☆</b> ▶	*ন Expand All ✔ Done	•	G Move D Copy 🛍 Delete		Can	cel Save

## Showing dashboard edges in edit mode

One of the most powerful things about dashboards is that they automatically resize to look their best on any device. You just build your dashboard in edit mode with any layout, and QuickScore takes care of the rest.

In this example, we'll start with a simple dashboard containing a chart and a bubble.



When we go to the Edit tab, we can see what the dashboard looks like without any resizing. There's now a clear visual difference between what will be part of the dashboard and what will not. There's also a message on the bottom explaining that your dashboard will automatically expand as you drag widgets.



So, we'll do just that. Here we've dragged the bubble down and to the right, and the dashboard canvas expands with the bubble as we move it.



By styling the area that's outside of your dashboard differently, we can help you get a better feel for how things will look once you leave edit mode. QuickScore is going to chop off all of the dotted gray background space and then zoom your dashboard to fill the remaining room. And, when you switch back to the Overview tab, that's exactly what happens.



Of course, there will be times when your dashboards are so big in edit mode that you have to scroll to see all of the widgets. When this happens, we'll show a scroll indicator and a message explaining what's happening.

Ô	Mobileworld Inc. <	Notes	\$\$ <b>0 0</b>
МЕ	Q Find	Overview	Edit April 2018 - < >
ר לב	+ New Dashboard 🗅 New Folder	Name	
VIEW	🖬 Strategy Map 🗧	Notes	
	🖬 Notes 🗧		
G	Example dashboard	G→ Move D Copy 📳 Template 🕆 Delete	Cancel
Ē	Example Dashboard		
DATA	Example 3	+ う へ = B	[] Fullscreen
	Example 4		
- -	Example 2		
C	■ Key Measure History Dashboard		
		Apr         Jun         Aug         Oct         Dec         Feb         Apr           2017         2017         2017         2017         2018         2018         Complete and the presentation of the presenta	
Q \$		Scroit to se worry abou automatics when you'r	e your widgets that are out of view. Don't it your dashboard being too large. We'll illy resize everything to fit the screen e done editing.
•	- Expand All V Done 4		1111

# Improved briefing slide arrows

It's now much easier to click through briefing slides quickly without moving your mouse. In this example we start on a briefing slide with a longer name.

Monthly Staff Meeting (6 of 13) Us	er and Influencer Engagement 👻	< >	E\$ V Edit	► Start
User and Influencer Engagem	ent Dashboard		\$   <b>b</b> -   <b>1</b>	C
Overview		Edit Slide	April 2018 👻	< >

When you click the back button to go to the previous slide, the controls on the top remain the same size even though the slide name is much shorter.

Monthly Staff Meeting	(5 of 13) Sales Report		- <>	E C Edit
Sales Overview Repo	ort	T	_	½   <b>b</b> - <b>0</b>   <b>0</b>
Overview			Edit Slide	April 2018 👻 < >

When you move your mouse away from the slide controls, they animate to their new size. By resizing only after a delay, the buttons don't move from underneath your mouse as you're trying to click them.



#### Improved delete warnings

When you start to delete something that could cause irreversible data loss, we now show a warning that the action can't be undone.

ſ	Delete confirmation
	Caution: this action can't be undone
l	Are you sure you want to delete Increase Lead Generation?
	Cancel Delete

## Improved sense of depth in modal dialogs

We've added shadows, blurring effects, and size animations to create a feeling of depth with our stacked dialogs. Here's an example dialog.

Report Writer: Row Filters	
<ul> <li>The last step is to choose which scorecard items you want to show in your adding row filters. Without any filters, your report would show a row for escorecard item across all organizations.</li> <li>You can filter on just about anything, but some examples are: <ul> <li>Specific scorecard items: For example, only items in two specific scorecar</li> <li>Name: For example, only items with "research" in their names</li> <li>Data type: For example, only percentage metrics</li> <li>Color: For example, only items performing in the red</li> </ul> </li> </ul>	r <b>eport by</b> very rds
CURRENT FILTERS	+ Add
Your report needs to have at least one row filter	
Cancel Back	Get Report

When we click the Add button, another dialog is stacked on top of the previous one. As this happens, the underlying dialog shrinks, fades out, and blurs. The overall effect is subtle, but it's effective in creating a better sense of where you are in the software.

Choose something that you want to filter on. This will limit your report to only showing rows for scorecard items that match your filter. Some types of row filters have calendar period ranges. These are different from the calendar period range you choose for columns. By keeping row filter ranges separate from column ranges, your reports can be much more flexible. For example, you can show the current performance of all metrics that were red at any point in the last year.	Report Write	er: Row Filters		
Filter On Start typing  Cancel Done	Choose somethi showing rows fo Some types of ro calendar period from column ran show the curren	ng that you want to filter on. This will lin r scorecard items that match your filter. ow filters have calendar period ranges. T range you choose for columns. By keepi iges, your reports can be much more flex t performance of all metrics that were re	nit your report to only hese are different from the ng row filter ranges separate kible. For example, you can ed at any point in the last year.	
Cancel	Filter On Start typing		•	
	Cancel		Done	

## Back buttons in all multi-step dialogs

There are now Back buttons in every multi-step dialog. Clicking Back will take you to the previous step, allowing you to revise your earlier choices.

	Report Writer: Choose Columns					
	The first step in creating a report is to below will be included in your report	The first step in creating a report is to choose which columns you want to see. Every scorecard item field you choose below will be included in your report as a column header.				
	BASICS	MEASURES ONLY	PERFORMANCE			
	<ul> <li>Name</li> </ul>	Measure Frequency	Color			
	⊙ Id	<ul> <li>Updaters</li> </ul>	<ul> <li>Score</li> </ul>			
	O Description	<ul> <li>Data Type</li> </ul>	Period Specific Notes			
orts.	Scorecard Item Type	<ul> <li>Aggregation Type</li> </ul>	Measure Value			
ate one.	<ul> <li>Organization</li> </ul>	Scoring Type	Thresholds			
	<ul> <li>Scorecard</li> </ul>	O Update Type	💿 Goal			
	<ul> <li>Owners</li> </ul>	Equations	Variance To Goal			
	Weight		% Variance To Goal			
	Tags		% Toward Goal			
	<ul> <li>General Notes</li> </ul>		• YTD			
	Cancel Back	<b>⊘—2</b> —3—4	Next			

#### Easier to assign measure updaters

We've redesigned the flow of assigning updaters to measures. You can now check the "Allow update of scoring threshold values" box before adding new updaters, or you can check the box next to updaters that you've already added.

UPDATERS	UPDATE THRESHOLDS	
Brandon Sanderson		Û
Douglas Adams		1
Jeremy Wenisch		1
Allow update of scoring threshold values           Start typing		

# Easier to use dashboard text widgets

We've redesigned dashboard text widgets to be much easier to use. There are improvements in several different text widget areas, and the overall effect is a much smoother experience.

When a text widget doesn't have any content yet, there's now a dotted line placeholder around it in edit mode so that you can tell where it is on your dashboard.

The first time you click on the text widget, it's in selection mode. You can drag it or resize it, but you can't type text yet.



When you click a text widget that's already selected, it goes into edit mode. Now you can edit your text.



So, we'll type some example text. And, just like any other dashboard widget, when you click away from a text widget, it won't be selected anymore.

This is an example text widget. You can type whatever you want in here.

Just like before, when you click on an unselected text widget, it becomes selected and you can drag or resize it. What's different now is that the widget has content, so it shows the formatting toolbar. If you change the color or font size, it will adjust for formatting of the entire widget.



And, if you click on the widget again, it goes into edit mode and you can type different content.



# Easier to add chart dashboard widgets

It's now much easier to add chart widgets to dashboards. First, click the "add widget" button and select Chart. Then select either Scorecard Item or Initiative.

Chart     Scorecard Item	
Scorecard Item	
	>
i Initiative	>

Here we've chosen to create a Scorecard Item chart, and all we have to do is click the Add button next to a scorecard item. You can even add more than one chart at a time by clicking the Add button next to multiple scorecard items.



In this example, we've added a chart for Product Revenue. If you want to edit the chart further, just click its configuration gear.

+ う で 〒 昭



#### Viewing large numbers without abbreviations

QuickScore abbreviates large numbers like "\$212,532.76" to "\$212K". This saves space and makes large numbers easier to understand at a glance. There are times, however, where it can be useful to see the full number. QuickScore now provides a way to see the unabbreviated version of a number whenever it's shortened.

For example, on the Scorecards Overview tab you can hover your mouse over any abbreviated value to see the full version.

ACTUAL AND THRESHOLD	VALUES			🖍 Edit
	SCORE	ACTUAL	RED	GOAL
• April 2018	10	\$908K	\$450K	\$465K
		April 2018		
		\$908,300		

On the Scorecards Measures tab, you can do the same thing.



There's also a new "Show Abbreviated Values" checkbox in the Display Options menu that adds or removes abbreviations for everything.



You can choose to "Show Abbreviated Values" in the Reports section too.

_		
	Report Writer: Choose Calendar Period Columns	
	Because you chose a performance column in the previous step, you now can choose which calendar period columns to show in your report.	
G	CHOOSE A CALENDAR PERIOD	/
This organization has no Reports. Click on the internation below to create on	CALENDAR Current Calendar 👻	on has no
Create Rep. *	FROM 3 Periods Earlier - TO Current Period -	
	Show Abbreviated Values	
	Cancel Back	

Finally, because there's no way to interact with screens that are exported, we show the full versions of all numbers in exports.

# Viewing measure IDs when building equations

You can hover over scorecard items to see their IDs when you're building measure equations.

G Find     Key Measures     Financial     Marketing	Q. Find       O This Measure       Image: Element of the second sec
<ul> <li>Customer Support</li> <li>Sales</li> <li>Operations</li> <li>Information Technology</li> <li>Human Resources</li> <li>Commercial</li> </ul>	<ul> <li>Revenue</li> <li>Product Revenue</li> <li>Training Revenue</li> <li>Book Revenue</li> <li>Total Revenue</li> <li>Cost of Sale</li> </ul>
Rollup Template Example Cancel	Coross Profit     Operating Expenses  Don

## Visiting source item when editing briefing slides

When you're editing a briefing slide, there's now a link to go to the original page. This can be helpful if you want to make edits to the source item, and this functionality matches the bookmarks section.

Overview		Edit Slide
Changes you make to a slide don't app	ly to the original item.	Go to Original ≻
Slide Name		1
Key Measure History Calendar Period		
Relative By Date		•
Current Period 🔻		

#### Visiting mass-edit from Scorecards Edit tab

On the Scorecards Edit tab you can make changes to one scorecard item at a time. There's now a blue information box on the top of the screen explaining how to edit many items at the same time in report writer mass-edit. If you click the box's close link, it will stay hidden until you close your browser.

🛱 Financial		<	Product	Costs					0	C
PERSONAL	Q Find		Overview	Measures	Ð			Edit	April 2018 👻	< >
산 Home ☆ Bookmarks PRESENTATION	+ New !	Scorecard Item and Loss •	This is wher filter for iter where you o	e you edit and create ns to edit, then click an change anything,	e scorecard it the Mass Edi including: it	tems one at a time it button. For exan tem names, aggreg	. If you want to edit ma nple, <mark>this report</mark> shows sation type, or owners a	ny at once, use all scorecard i and updaters.	e the <u>Report Writer</u> tems in this organiz	xation,
<ul> <li>Strategy Maps</li> <li>Dashboards</li> </ul>	O Product	Revenue •	Name			1	Туре			
<ul> <li>Charts &amp; Reports</li> <li>Briefings</li> </ul>	<ul> <li>Book Re</li> <li>Cost of Sale</li> </ul>	venue •	Product Co Description	osts			• Measure Weight			• •
DATA Scorecards	• Product	Costs •						dvanced On	tions	
<ul> <li>Initiatives</li> <li>Documents</li> </ul>	<ul> <li>Training</li> <li>Book Pro</li> <li>Total Cost</li> </ul>	Venues • oduction • sts •	E MEASURE DET/	ILS			,	Auvanceu Op	uons	
	Gross Profit		E Scoring Typ	e /Red Flag	Ci	alendar Monthly	•	Data Type	v	•
	<ul> <li>Operating E</li> <li>Net Operatin</li> </ul>	xpenses •	Aggregatio	а Туре	-	ecimal Precision Default	•	Currency Default		-
			SERIES Actual Valu	e	R	ed Flag		Goal		
۹ 🕈 د	♥号 Expand All	✔ Done	I ⊡→ Move	ට Copy 🗊	Delete				Cancel	Save

# Viewing every group's type

We now show the group type next to the group name. This applies to everywhere in QuickScore, and it makes it easier to manage user permissions.

		OWNERS
1	Communication Users)	Updaters
1	or	My Supe
	•	Start typ
	<b>▼</b>	Start typ

# General

#### Automatic logout prompt

QuickScore automatically logs you out when you haven't clicked on anything for an hour. After 50 minutes of inactivity, we now open a dialog saying that you will be logged out in 10 minutes.

This number counts down every minute until it reaches 1, at which point it counts down in seconds.

ndants of linked items		
rid Inc.	Automatic Logout	
asures	You will be automatically logged out in 10 minutes	
sal.		
ting		
ner Support	Stay logged in	
fiens.		
ution Technology		

# Editing related item URLs

You can now edit the URL for web address related items, rather than having to delete and recreate them.

DATA USED IN CALCULATIONS			RELATED ITEMS	+ Add
	SCORE	WEIGHT	Corporate website	
▲ Financial	8.5	25%	WWW.SPIDERSTRATEGIE	5.CC
▲ Customer	6.1	25	Web Address	ard
Internal Processes	4	25	orporate website	
<ul> <li>Organizational Capacity</li> </ul>	4.9	25'	ttps://www.spiderstrategies.com	
		Ca	incel Sa	ve

# Anyone can view item history

The QuickScore history buttons are now viewable by all users, regardless of their permissions.

Migr	ate Se	ervers to C	☆   <b>b</b> -   <b>i</b>   <b>b</b>	
Ove	erview	Timeline		Edit
Migra	Migrating to the cloud will save us not only money, but a significant amount of time.		PROJECTED SCHEDULE	PROJECTED TOTAL BUDGET
us no signif				•

For example, here's what the history dialog looks like for a "Migrate Servers to Cloud" initiative.

igrate Servers to I	Migrate Serv	vers to Cloud History	1		
w Timeline					
	EVENTS			🖆 Export	
ng to the cloud will sa ant amount of time.	DATE	USER	ACTION	DESCRIPTION	
	Mar 14, 2017	QuickScore Administrator	Created		
OK	Mar 14, 2017	QuickScore Administrator	Created status for 3/1/2017		
T REMAINING	Mar 14, 2017	QuickScore Administrator	Created status for 5/1/2017		
6K	Mar 14, 2017	QuickScore Administrator	Created status for 7/1/2017		
DATE	Mar 14, 2017	QuickScore Administrator	Created status for 9/1/2017		er budget
ATE	Mar 14, 2017	QuickScore Administrator	Created status for 11/7/2017		stal: \$148K
ELAPSED	Mar 14, 2017	QuickScore Administrator	Created status for 12/7/2017		s2,500 under budge
	Close				
	6		more reares for		

# Changing Connect field concatenation order

Connect supports combining multiple source data fields into a single ID. This ID is then used to match a single measure in QuickScore. For example, you may want to create unique IDs by combining a measure name field with an organization field, because multiple organizations may share the same measures.

In the past, Connect created this single ID by concatenating all ID fields, starting on the left. Connect now allows you to change the order that the fields are concatenated in.

<b>⋘</b> Connect <sup>™</sup>									admin	Log Ofi
Home >> Edit In	nport	>>	• test >> Sour	ce Data				Ok	View Sample Data Set	Cancel
Upload File Directory File Listing concatenate_names_import	Worksh Sheet Unuse	d tric Id/	Use the dat a specific Use a dat header ro Use a re live perior Use this specific dat	ed in each data row for impo w for imports e for each import:	Allow Value/Threshc volue/Threshc	es ¢ old Format xisting value	Missing Values Ignore + Date Format 12/31/2009 + ss			
			(Matric Id/Name ) (2)	( Matric Id/Name ) (3)	(Matric Id/Name ) (1)	(Date)	(Value)			
			(Medic Id/Name) (2)	( Medic Id/Name ) (3)	(Medic Id/Wallie ) (1)	(Date)	(value)			
	Ignore		A	В	C	D	E			
		1	lable 1	Matula Nama D	Mahala Nama D	Data	Malua			
		2	Metric Name 1	Metric Name 2	Metric Name 3	Date 02/01/2010	value			
	-	3	1	metric 1	1	03/01/2018	9			
		4		metric 2	1	03/02/2018	9			
	- C	6	, ,	metric 1	1	03/04/2018	9			
			-		-		-			

# Creating encrypted database connections

Connect can now communicate with remote databases over encrypted connections.

#### Improved score calculation speed

We've improved our server-side calculation speed so that it takes even less time for your measure value updates to color up the scorecard tree.

## Displaying pushed data

QuickScore can now push changes to you so you don't have to wait for updates to appear the next time you click somewhere. This is useful for things that take a while to process, like deleting organizations. It's also helpful for notifications, like instantly receiving alerts.

# Admin

#### Setting advanced password options

There are three new options in Application Administration that help you choose how your users manage their passwords.

- Number of changes before a password can be reused.
- Force users to change passwords every X number of days.

#### • Allow password reset via email.

PERSONAL	Shared Dashboards and Strategy Maps	Enforce Strong Passwords (Numbers And Letters)
பி Home	CONFIGURATION	No
윴 Bookmarks	Application Administration	Changes Before A Password Can Be Reused
PRESENTATION	Server Administration	Always allow password reuse
Dashboards	Database Connections	Force Users To Change Passwords Every Number Of Days
Charts & Reports	License Management	
цц Briefings	MONITORING	Number Of Invalid Login Attempts Allowed
DATA	Diagnostics	Never lock accounts
✓ Initiatives	Current User Activity	Allow Password Reset Via Email
Documents	View Log Files	No

#### Resetting passwords via email

As shown above, there's a new "Allow password reset via email" setting in Application Administration. When enabled, your users will see a "Lost your Password?" link on the login screen.

	Username	
	Password	
	Scottco 👻	
	Log In	
	Lost your password?	
Proved by		
Spider Strategies		Version 3.2.4.12

When you click the link, the login box changes to a password reset form. All you have to do is type in your email or username and click the Reset My Password button. QuickScore will then email you a password reset email.

	Email or Username Scottco Reset My Password Back to Log In	
Powered by Spider Strategies		Version 3.2.4.12

# Authenticating with OpenID

There's a new OpenID configuration section in Application Administration. When enabled, QuickScore can use a 3<sup>rd</sup> party OpenID server for single sign-on authentication.

PERSONAL	Settings	Yes 👻
<u> </u>	PERSONAL	
ති Bookmarks	Account Info	AUTHENTICATION SETTINGS
PRESENTATION	Alert Preferences	Authentication Type
Strategy Maps	Proadcast Alert	OpenID Connect -
Dashboards	Dioducast Alert	Authorization Endpoint
🕒 Charts & Reports	SETUP	·
Briefings	Calendars	
DATA	SECURITY	Token Endpoint
Scorecards	Users	llear la farmation Farda sint
Initiatives	Groups	User Information Endpoint
Documents	Shared Dashboards and Strategy Maps	Client ID
	CONFIGURATION	
	Application Administration	Client Secret Key
	Server Administration	
	Database Connections	

Here's what the login screen looks like.

This database uses a authentication servic will forward you to th you will be prompted and password.	third-party e. Clicking Login hat service where I for a user name	
Scottco	•	
Log I	n	

# Authenticating with encrypted LDAP

QuickScore can now communicate securely with remove LDAP servers. This is very useful for hosted customers who want to use an encrypted connection to communicate with their own LDAP server for authentication.

NFIGURATION	
Application Administration	Edit LDAP Server
Server Administration	URL
Database Connections	(i.e. ldap://localhost:389)
License Management	Base
NITORING	(i.e. ou=group,dc=example,dc=com)
Diagnostics	Admin DN
Current User Activity	(i.e. cn=Manager,dc=example,dc=com)
View Log Files	Admin Password
Backgroon Process Status	
VANCED	User Filter
Recalculate All Scores	(i.e. uid)
Tree Fixer	Enable Secure Connection (SecureTLS)
SQL Console	Cancel
Generate Demo Data	

# Viewing calendar history

There's now a history button in Administration Calendars.

PERSONAL	Settings		L. Add Colordan		0.0
ይ Home	PERSONAL	Monthly	+ Add Calendar	MONTHLY	
숫 Bookmarks	Account Info	inonenty		17 Edit Calendar	
	Alert Preferences	Quarterly		PERIODS (84)	+ Extend Calendar
Charts & Reports	Broadcast Alert	Yearly		April 2012 Apr 1, 2012 – Apr 30, 2012	
Briefings	SETUP			Nov 2012	/
DATA	Calendars			May 1, 2012 – May 31, 2012	
Scorecards	SECURITY			June 2012	
<ul> <li>Initiatives</li> </ul>	Users			Jun 1, 2012 - Jun 30, 2012	
🕒 Documents	Groups			<b>July 2012</b> Jul 1, 2012 – Jul 31, 2012	

When you click it, you'll see all of the changes that have been made to the currently selected calendar.

	EVENTS				🖆 Export
	DATE	USER	ТҮРЕ	ACTION	DESCRIPTION
	Oct 6, 2015	Clive Keyte	Calendar Period	Created	from 4/1/2016 to 3/31/2017
	Sep 17, 2016	Clive Keyte	Calendar Period	Created	from 4/1/2017 to 12/31/2018
and S	Mar 14, 2017	Administrator	Calendar Period	Created	from 1/1/2019 to 3/31/2019

## Setting separate "edit" and "update" initiative permissions

Administrators now have finer-grained controls for setting initiative permissions. The ability to Edit an initiative is now a separate permission from being able to Update its status.

O VIEW		C REPORTS			~
View All Organizations		Modify Reports		Create + Edit Users in Groups They Administer	~
Modify Bookmarks and Personal Settings			100	Delete Users in Groups They Administer	~
Change Personal Account Info		Modify Briefings		Modify Organization/Scorecard Structure	~
		mouny brienigs	× .	Modify Dashboards and Strategy Maps	<
		••• OTHER		Modify Shared Dashboards and Strategy Maps	~
update All viewable Measure Actual values	×	SQL Console (Read Only)		Modify View Organization Permissions	~
Update All Viewable Scoring Threshold Values		Modify Notes		Import Data	~
		Modify Owners and Updaters			
Edit Initiatives		Modify Related Items		SUPER ADMINISTRATION	
Update Initiative Status		Modify Scorecard Overview		Modify Calendars	~
Archive Initiatives				Administer All Groups	~

#### Forcing score recalculations

Administrators can now force QuickScore to recalculate scorecard item scores. This is not a very common task, but it can be very helpful if something is being colored incorrectly. To start the

recalculation process, select the problem organization in edit mode and choose "Recalculate Scores."

Î Financial	Financial Profit and Loss
Q Find	Overview Measures 🥹 Edit April 2018 👻 🤇 🗲
Mobileworld Inc.	
Key Measures	PERFORMANCE OF HISTORICAL PERFORMANCE
Financial	New Organization
Marketing	a Rename
Customer Support	
>    Sales	Сору
Operations	() Copy as Template
Information Technology	↑ Promote To Top Level
Human Resources	0
Commercial	Image: Break of the second s
>   Rollup Template Example	1 Delete
	DATA USED IN CALCULATIONS RELATED ITEMS + Add
শন Expand All ✓ Done	Show Notes (0)  No related items

This opens the recalculate scores dialog. You can choose to include all descendant organizations, as well as whether to include referenced scores in other scorecards.

					10				
	Recalcula	ate Scoi	res						
ت	This will r	ecalculate s	cores for th	is organizat	tion.				0
	Include d	lescendant eferenced s	organizatio	ons her scoreca	ards				
	Cancel					Finish		Jul	Aug
					2017	2017	2017	2017	2017

#### Sorting current user activity

You can now sort the Current User Activity screen by clicking on the column headers.

A Home	Server Administration	USER ACTIVITY (Total users: 6)				
	Database Connections	DATABASE	USER	LOGIN TIME	IDLE TIME 🗸	LOCATION
Charts & Paparts	License Management	QuickScore Demo (MySQL)	admin	May 3, 2018 10:10 AM	a few seconds	73.73.191.233
Briefings	MONITORING	Test 3.2	🔲 admin	May 3, 2018 10:12 AM	7 minutes	96.227.2. 206
Scorecards	Diagnostics	Test 3.2	admin	May 3, 2018 10:14 AM	17 minutes	173.73.191.233
✓ Initiatives	Current User Activity	Test 3.2	Power, Colby M	May 3, 2018 10:24 AM	25 minutes	63.248.82.141
	View Log Files	Test 3.2	Admin, Colby	May 3, 2018 10:15 AM	34 minutes	0:0:0:0:0:0:0:1
	Background Process Status	Test 3.2	odmin admin	May 3, 2018 10:06 AM	43 minutes	76.119.227.38
	ADVANCED					

#### **Hiding scores**

Although it's not a popular configuration option, you can now set "Scores Visible" to "no" in Application Administration.

		Notity Owners OF Parents OF Linked items when source is	measure onus (ripe belinited; i.c. Kilogranis[mites]nours)
PERSONAL	SECURITY	Modified	hours days minutes
값 Home ☆ Bookmarks	Users	No	Allowed Tags (Pipe Delimited, Leave Blank To Allow Any; I.E.
	Groups		Important Highughted)
PRESENTATION  Dashboards	Shared Dashboards and Strategy Maps	SCORING	
🕒 Charts & Reports	CONFIGURATION	Yes	Default Currency Unit
Briefings	Application Administration	Ignore Gray Scorecard Items For Color Roll-Up	3 (onned states bottar, osb)
DATA	Server Administration	Yes	Choose Available Currencies
E Scorecards	Database Connections	By Default, Missing Values	
✓ Initiatives	License Management	Make entire equation blank	
Documents	MONITORING	Show N/A Option	
	Diagnostics	No ·	
	A		

#### This will prevent scores from appearing in most places in QuickScore.



There are still a few places where scoring cannot be avoided, though, like graphing the performance of a non-measure scorecard item.

# Displaying licensing information

The License Management screen now correctly displays information about QuickScore 3 licenses.

🖍 Edit

If you still have a legacy version 2 license that is broken down by group type, that will work too.

Spider Strategies Demo Expires in 1004 days				
Used 1 of 6 Databases				
Spider Strategies Demo (My	rsql)			
Power Users (15000)	Communication Users (20000)	Viewers (No limit)		
18	3	8		

## Auditing shared dashboards

QuickScore now stores information in the database about all changes made to shared dashboards. For now, this data can be accessed using the SQL Console.