Spider Strategies

What's New in 3.2

Guide to new features in QuickScore 3.2
Updated June 4th, 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.

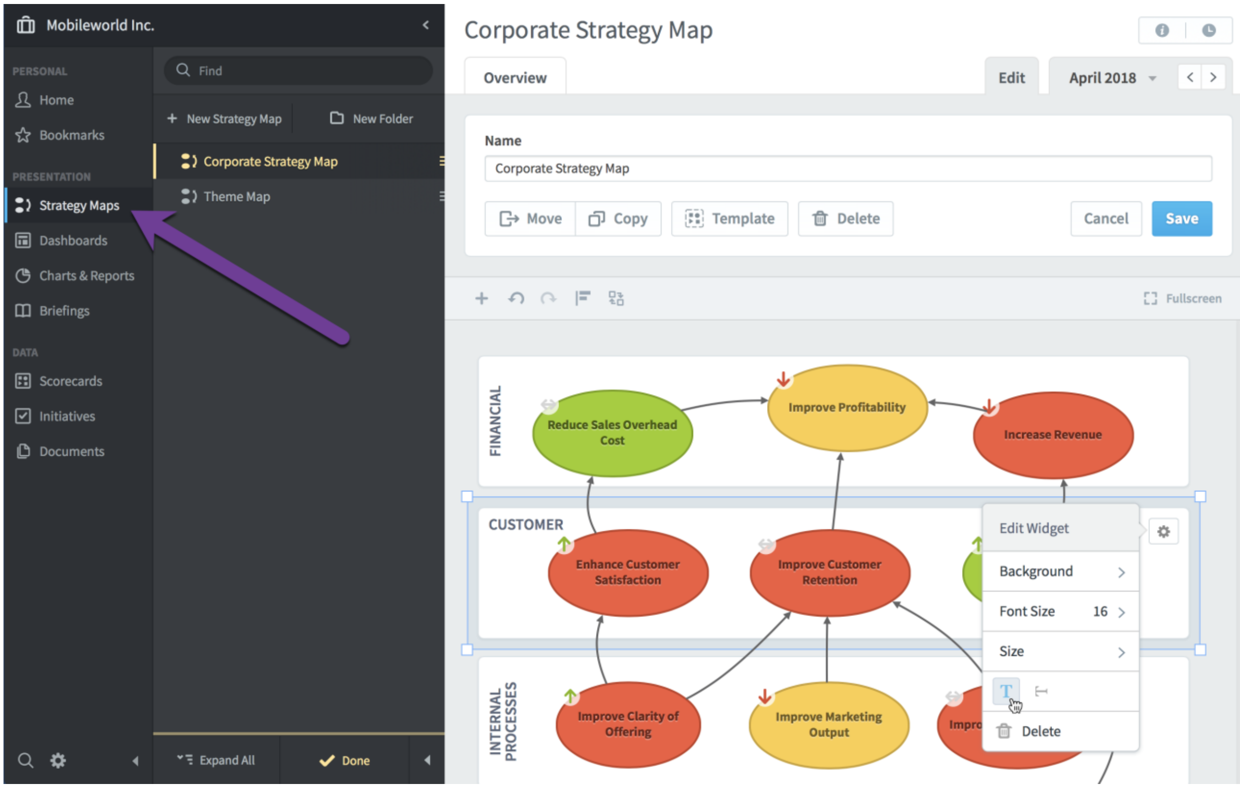
We have more information about all of our free and paid services at https://www.spiderstrategies.com/services/

Strategy Maps

New strategy map section

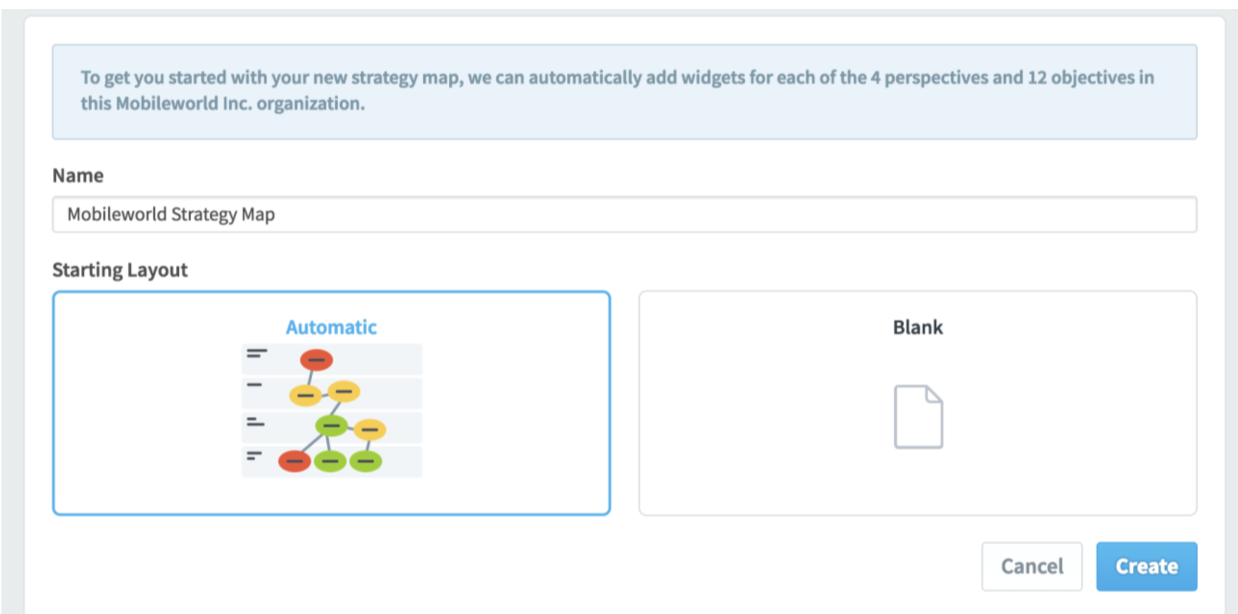
There's an entirely new section in QuickScore 3.2 called Strategy Maps. Of course, you could build strategy maps in QuickScore before, but they were called dashboards and were in the dashboards section, which isn't ideal for something so important to the balanced scorecard methodology.

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.

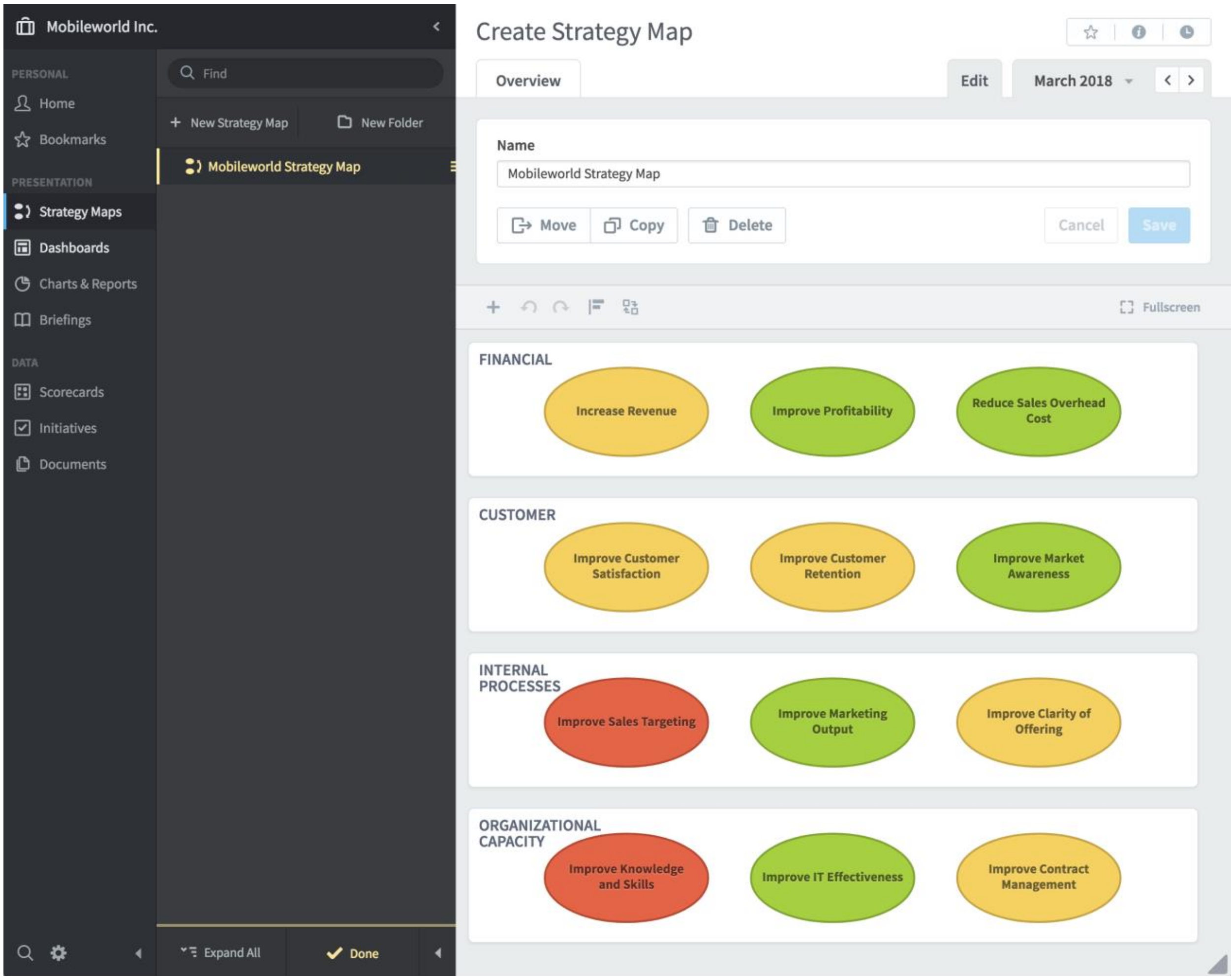


Automatically generated strategy maps

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



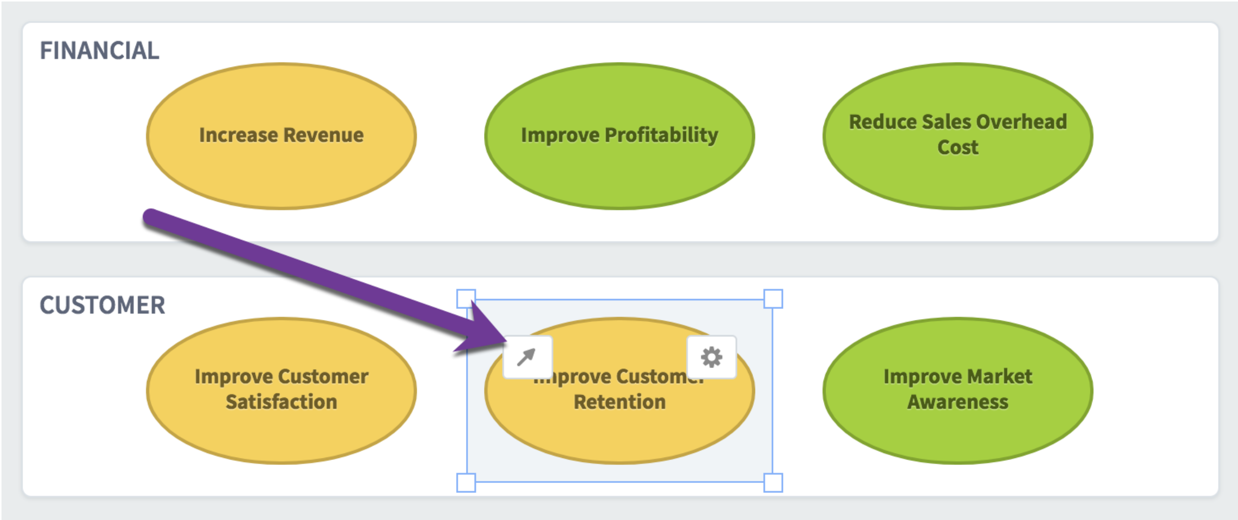
When you choose Automatic, your new strategy map will start with your current organization's perspectives and objectives already on the canvas.



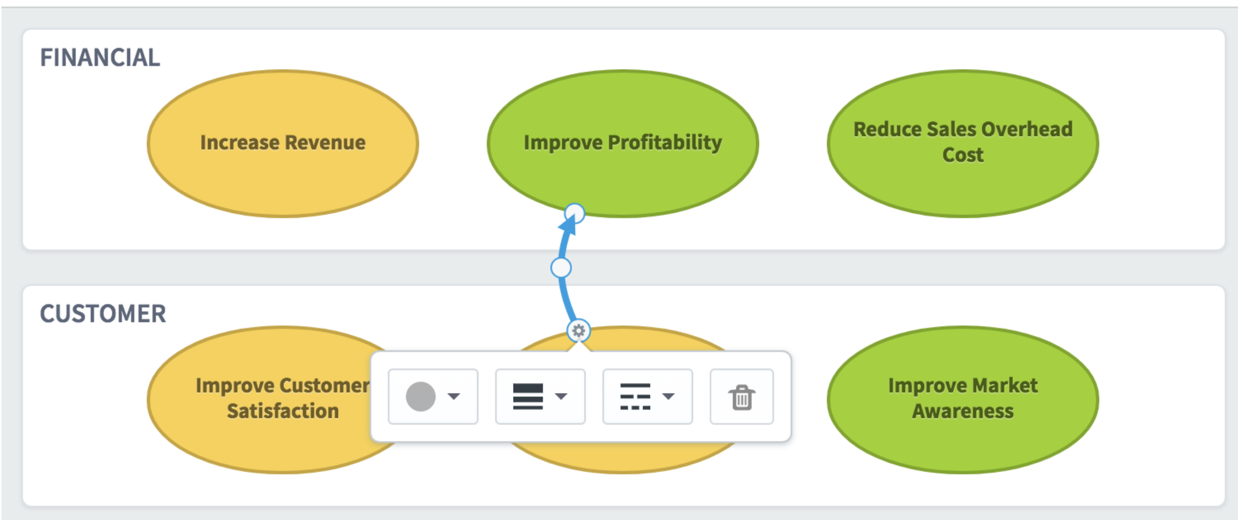
This saves a lot of time because all you need to do is adjust the position of your objectives and draw arrows.

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.



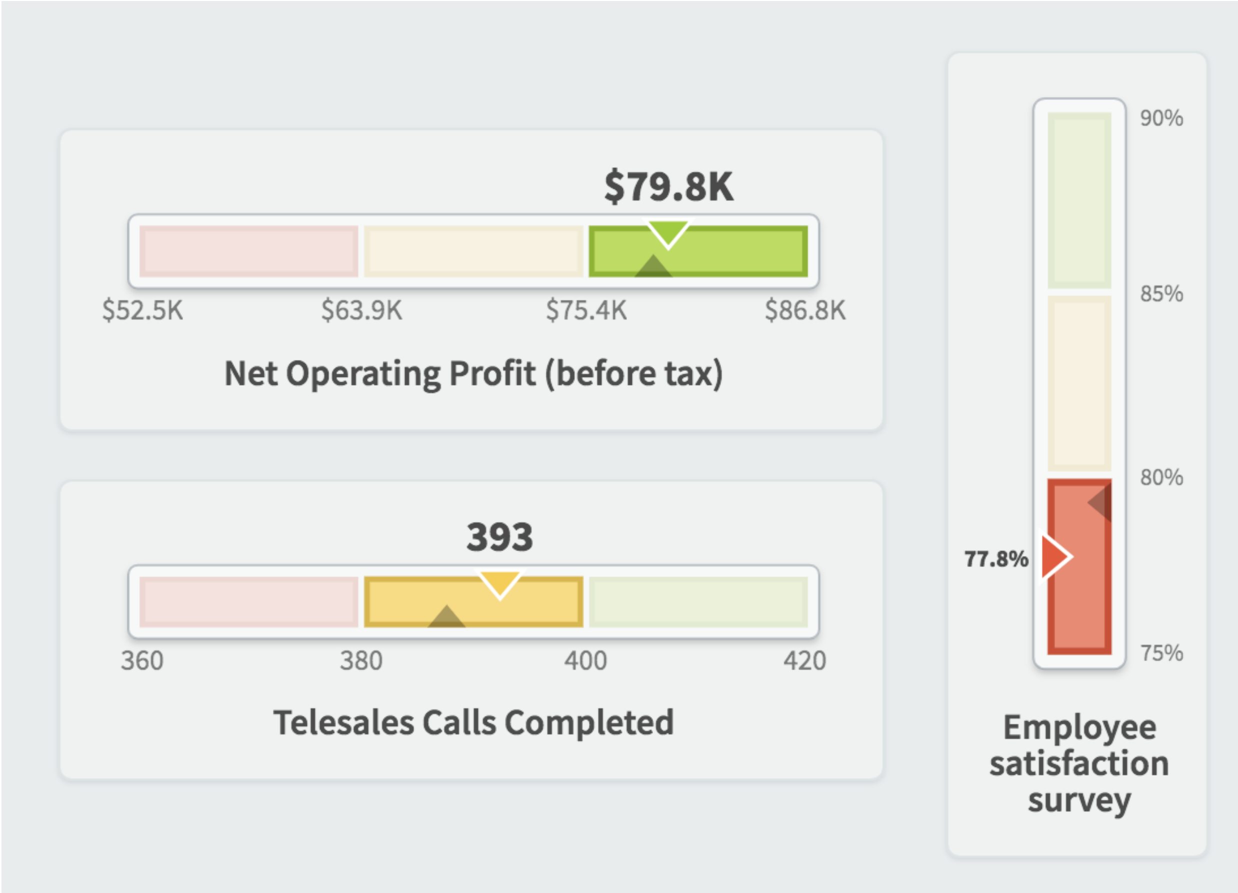
You can even change the arrow’s thickness, opacity, and dotted style.



Dashboards

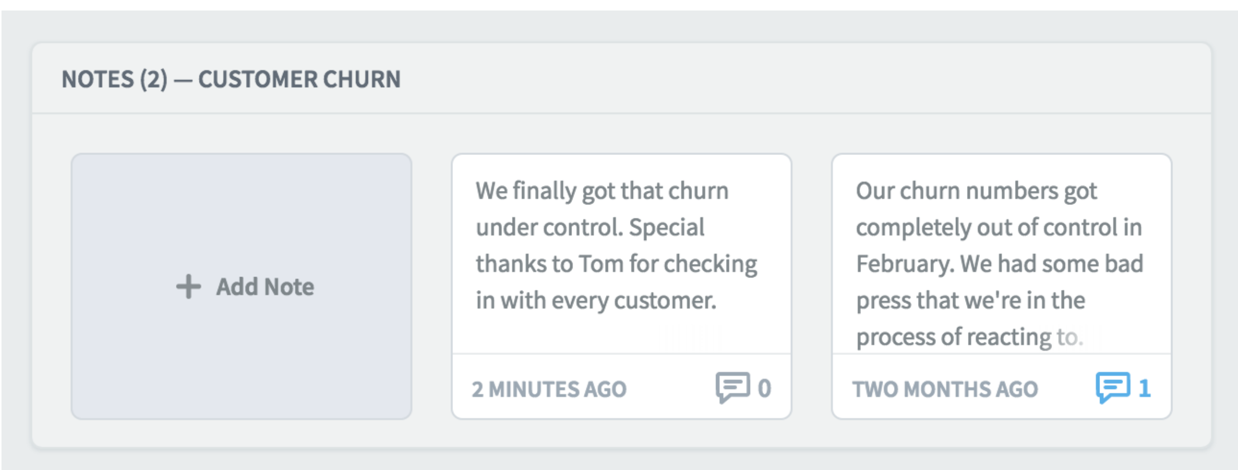
Linear gauge widgets

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.

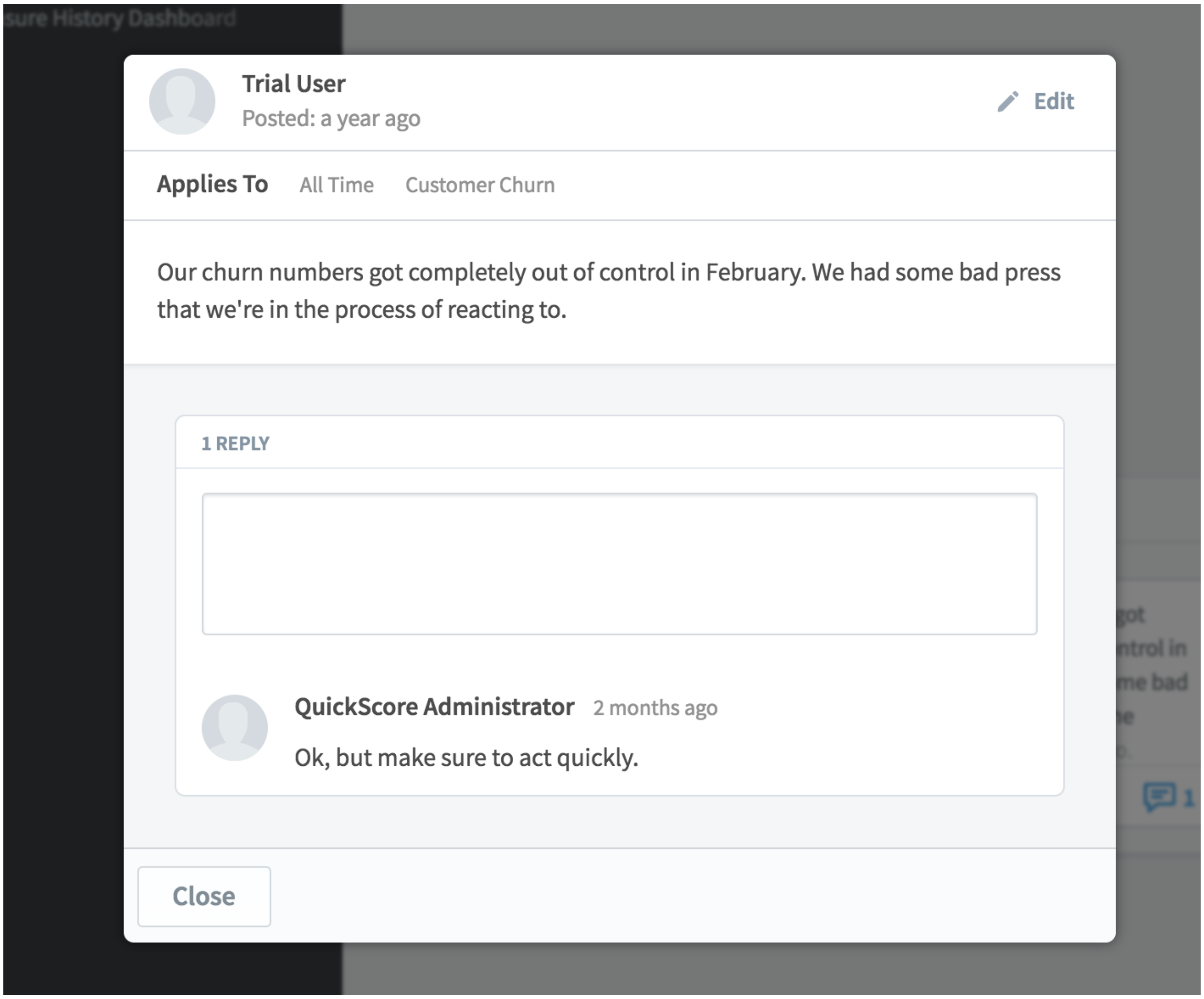


Note widgets

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.



Report widgets

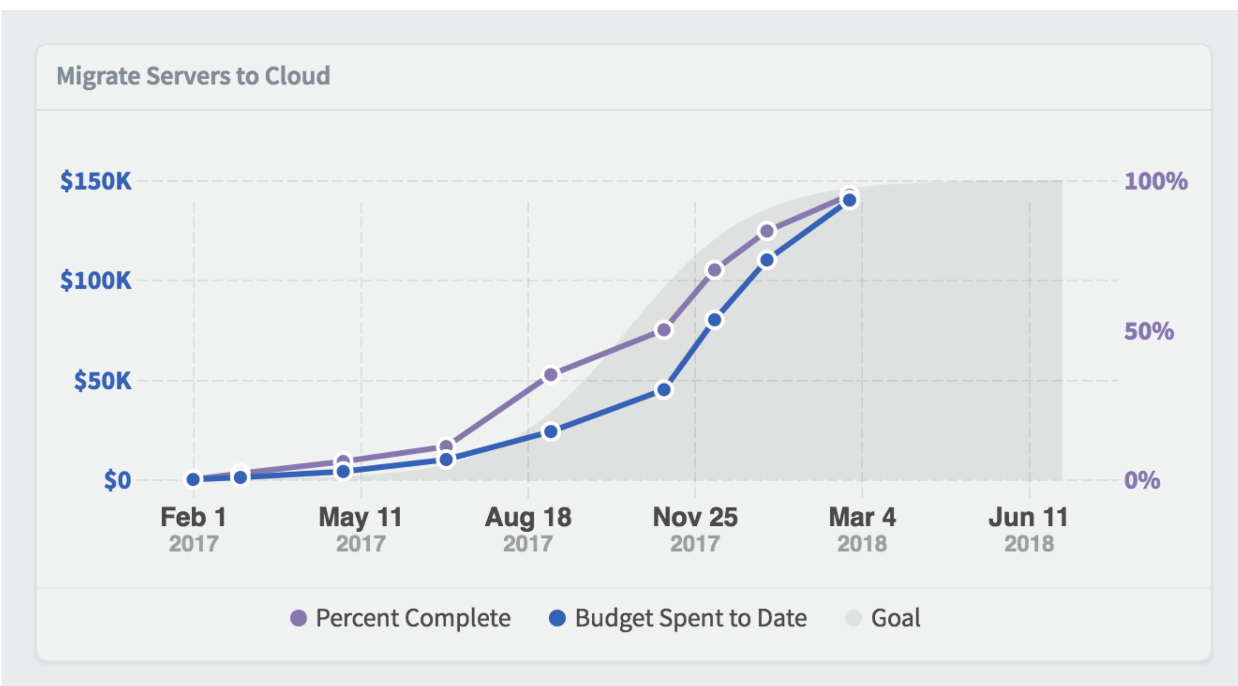
You can now add reports to your dashboards as resizable widgets. Just choose an existing report in the dashboard's "add widget" menu. There are even configuration options for things like font size.

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

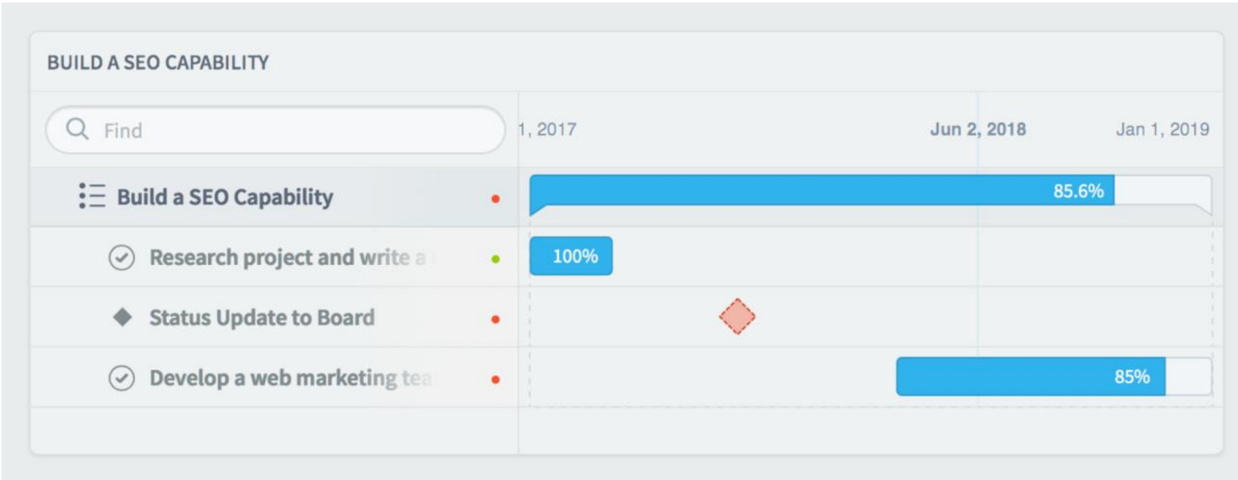
Initiative chart widgets

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.



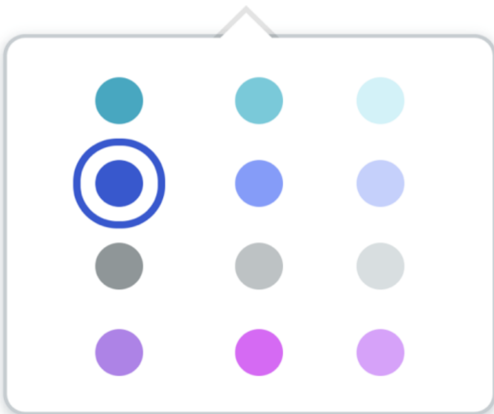
Graphing initiatives on scorecard chart widgets

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.

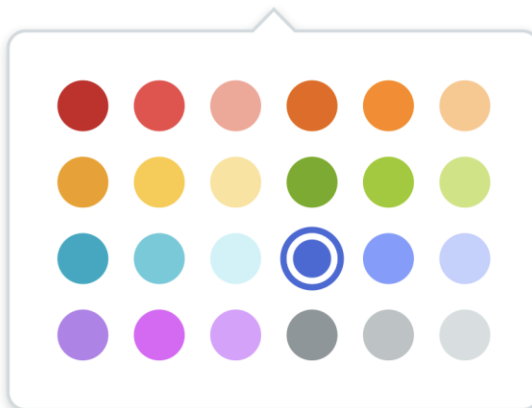
We’ve built this example chart so that the measure values use the left axis, and the initiative values use the right. By viewing our data in this way, we can start to determine if an initiative is affecting the performance of a measure.

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.



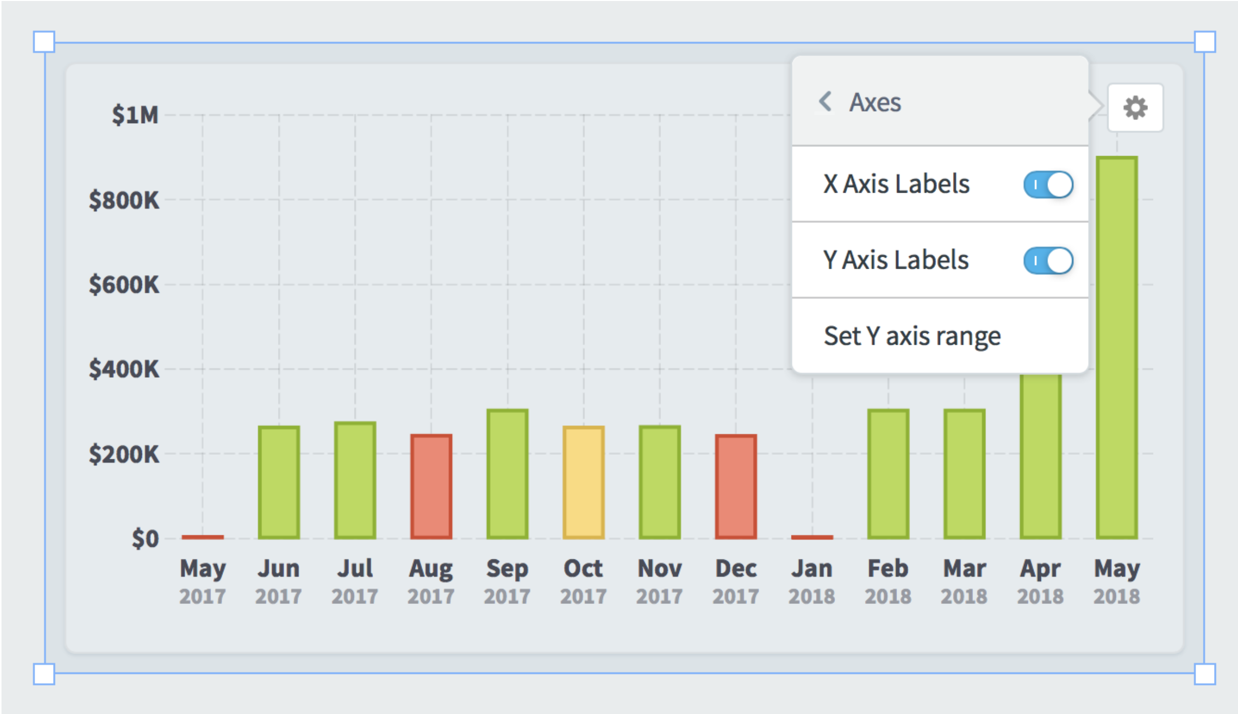
Old Color Palate



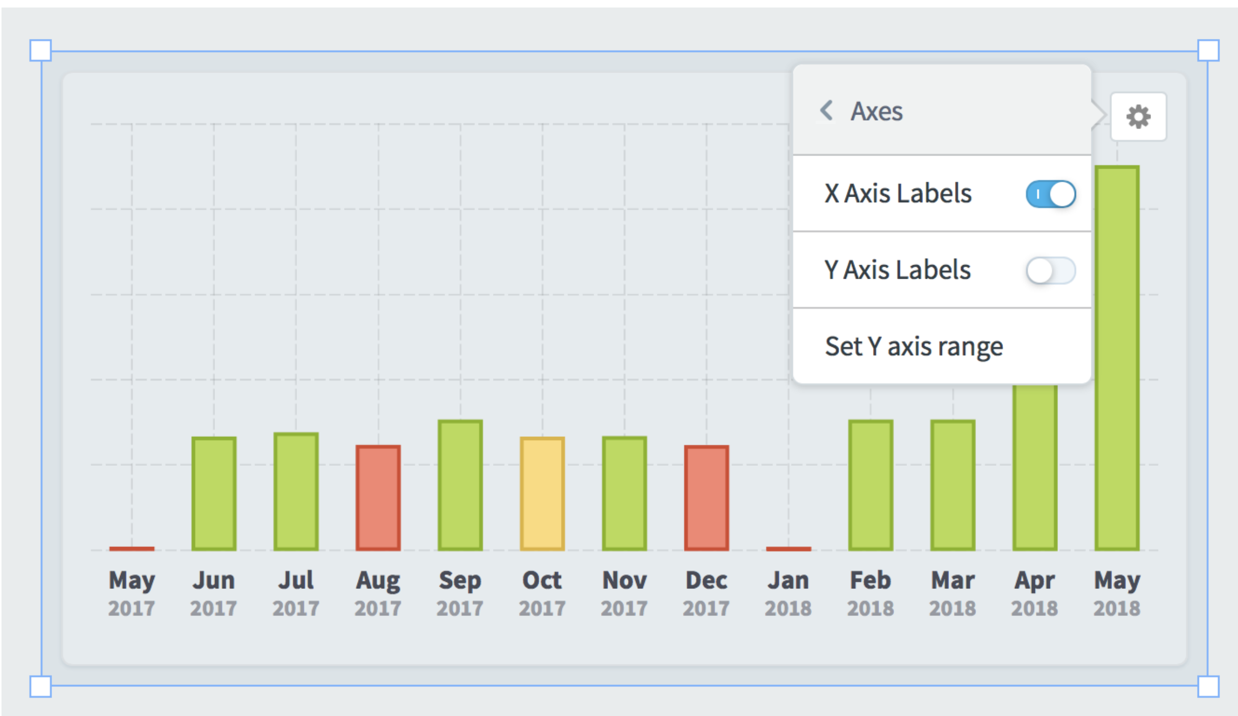
New Color Palate

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.



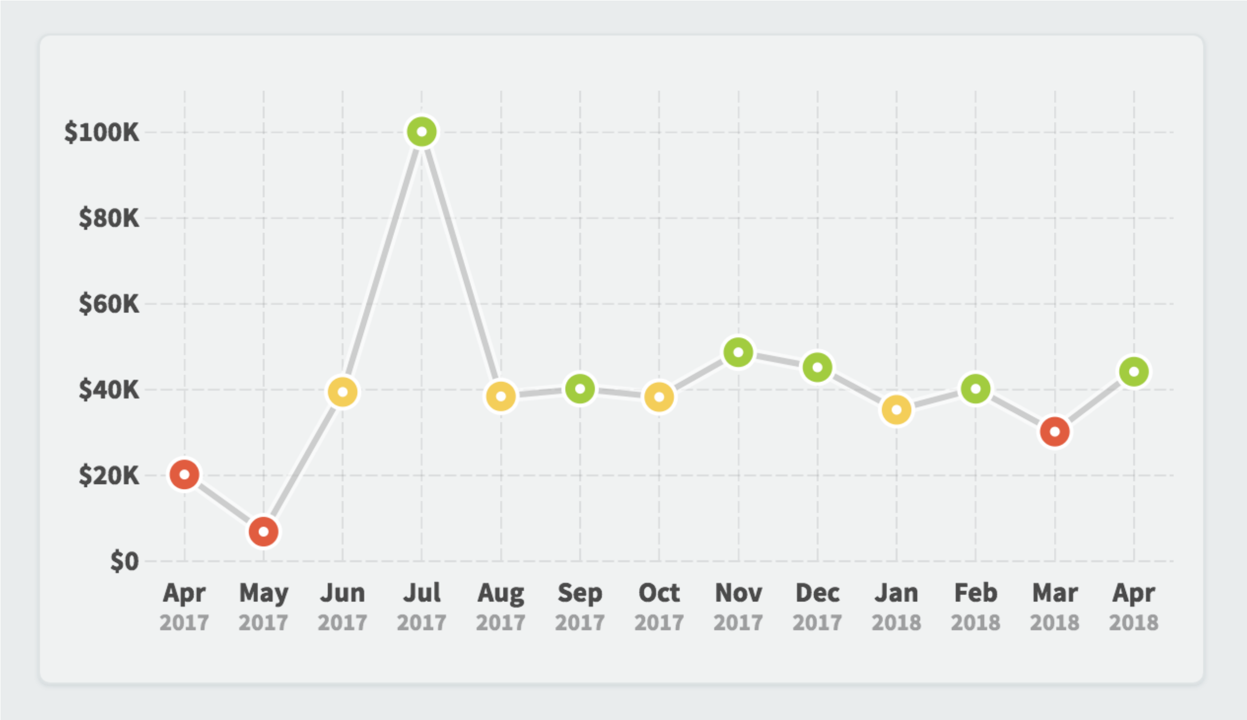
Here we've turned off the Y axis.



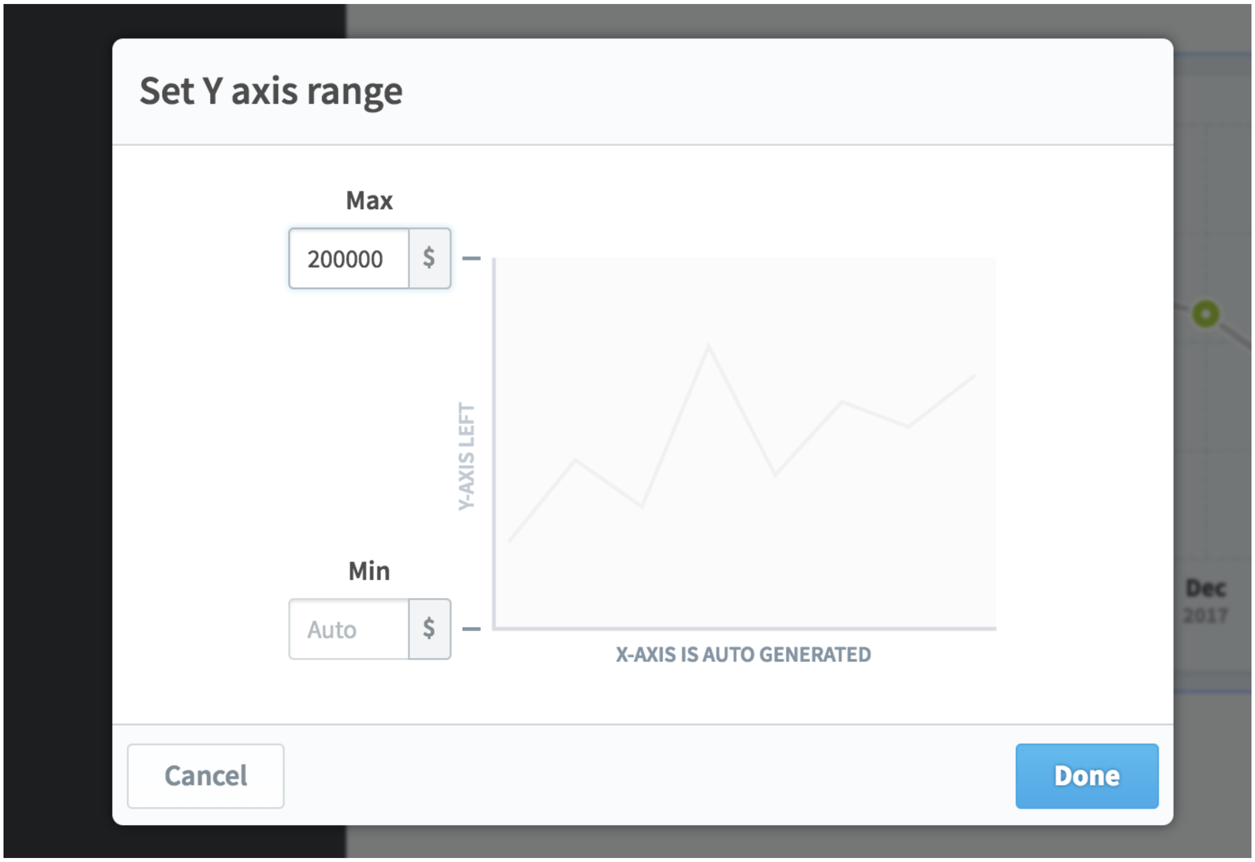
Being able to turn off axes is particularly useful when creating small charts that show a general overview of performance rather than specific numbers.

Manually setting chart Y axis min and max

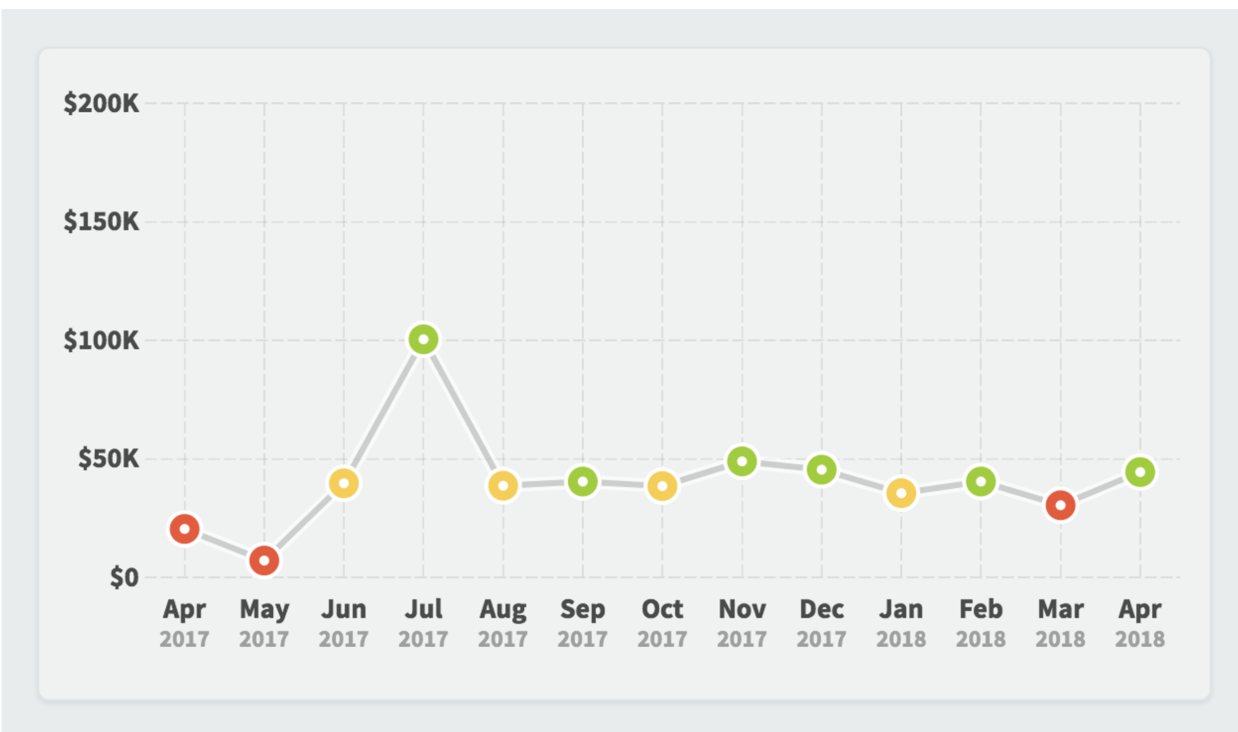
By default, charts automatically determine their Y axis scale based on the data that they're showing. In this example the chart range is $0 to $100k.



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.

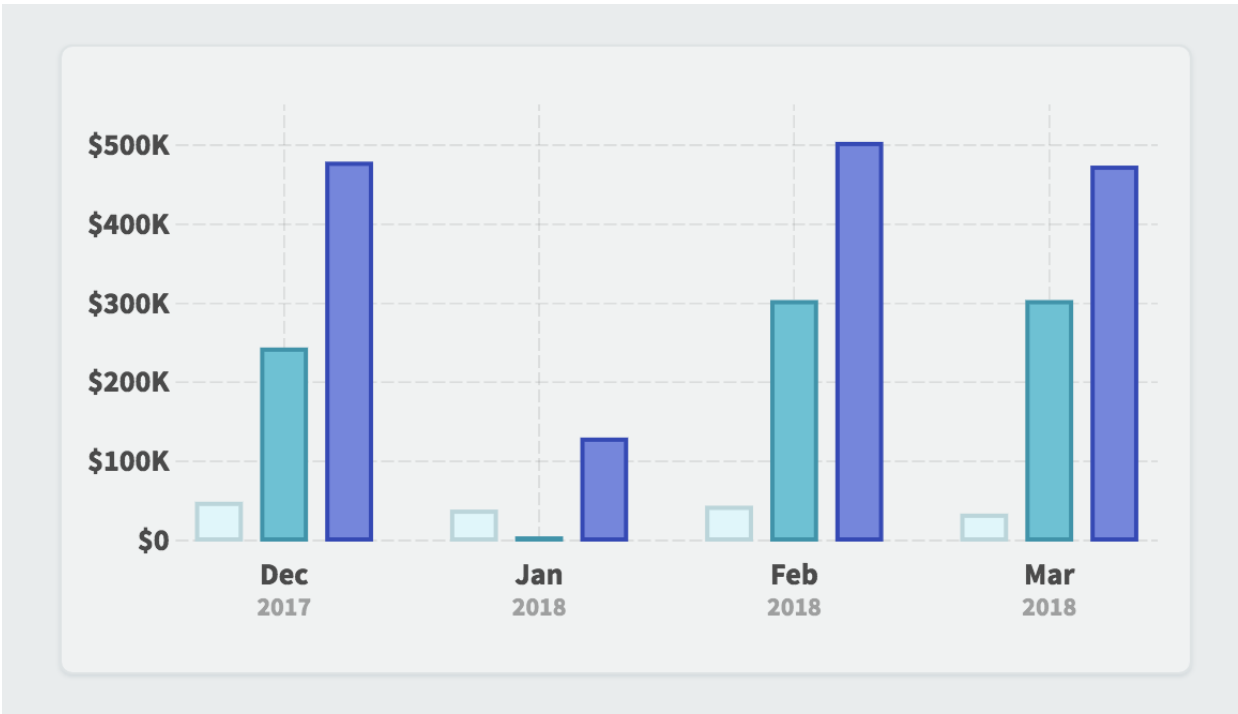


That creates a chart that looks like this.

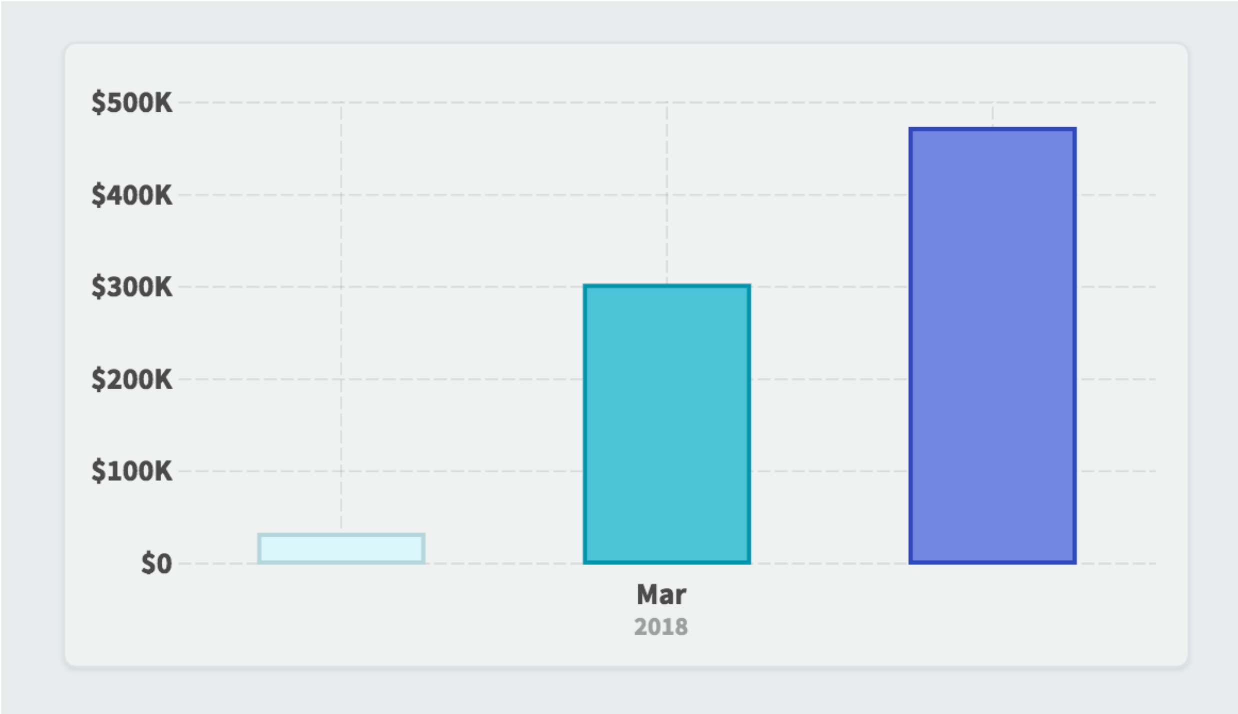


Better single-period chart labels

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.

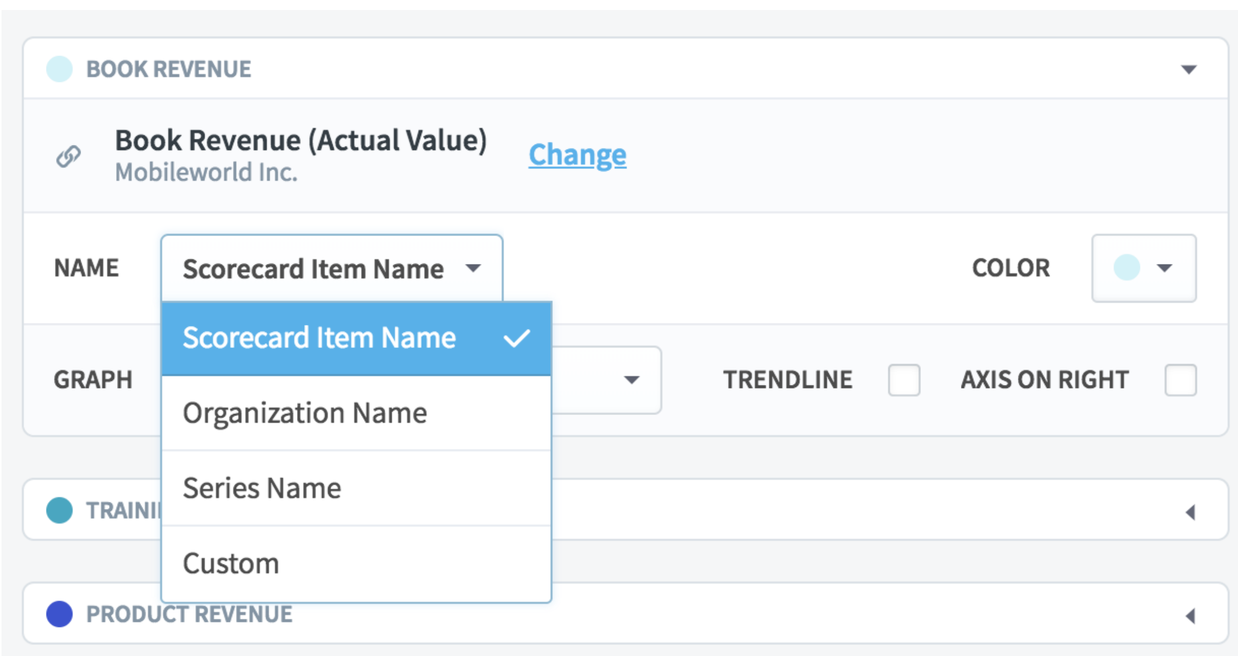


In 3.2, charts now show labels for the individual bars when a single period is showing.

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.



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

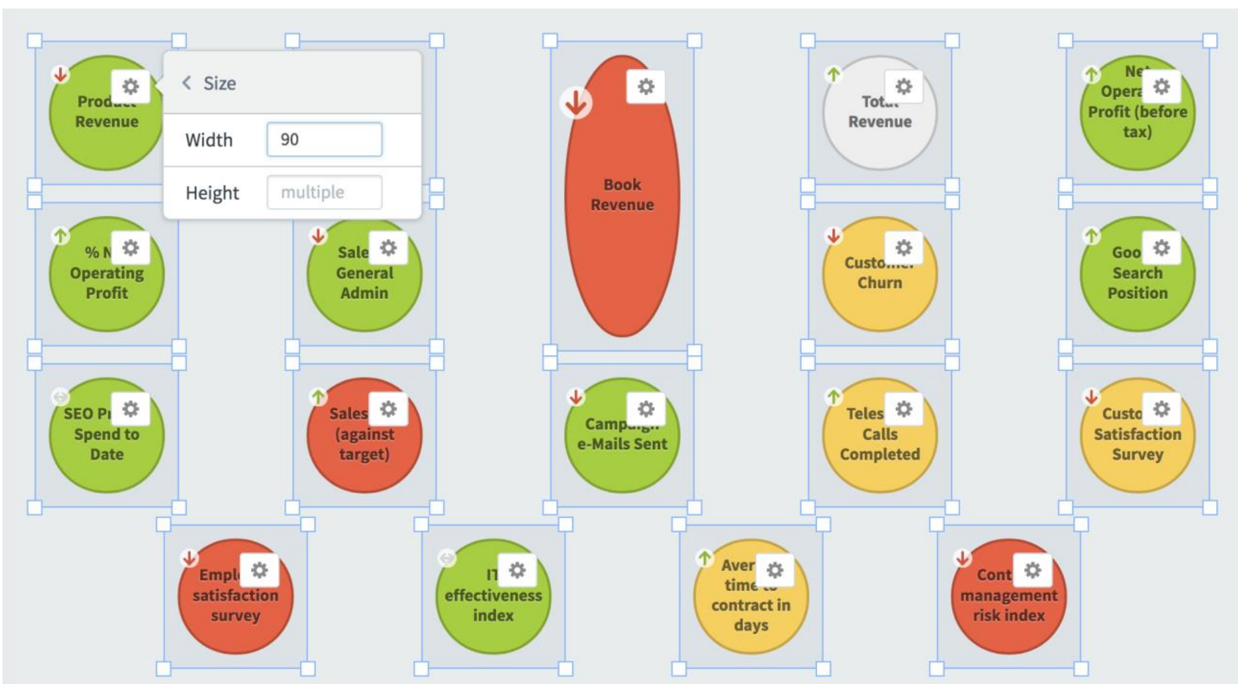
Resizing widgets to specific dimensions

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.

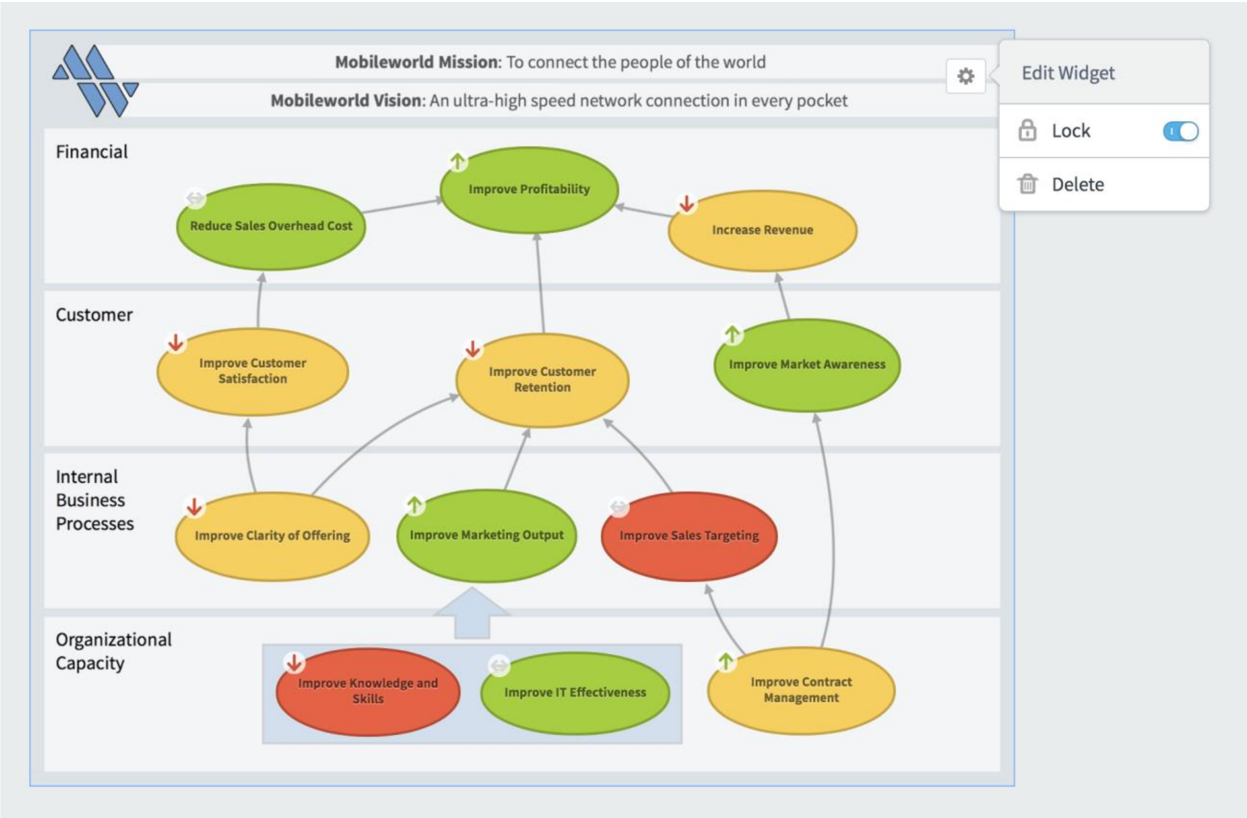


Locking dashboard widgets

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.

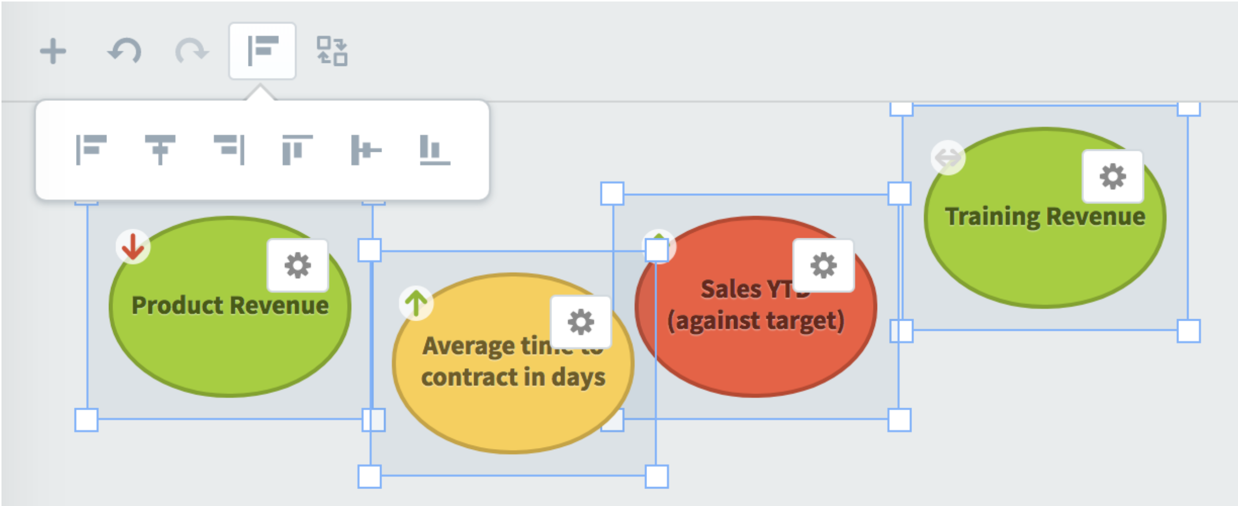
The only problem with this new approach is that if you aren't careful, you can accidentally move your background image as you're editing other widgets. In version 3.2 we've solved this problem by adding the ability to lock any dashboard widget in place.



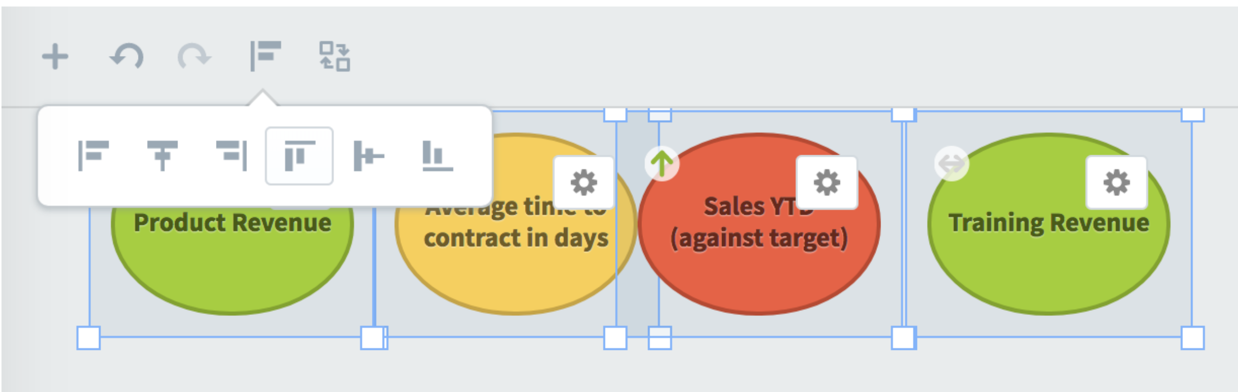
Not only does locking a widget prevent it from moving, but it also prevents it from being selected along with other widgets. So, when the background image is locked, you can drag to select all of the widgets on top of it without selecting the background image itself.

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.

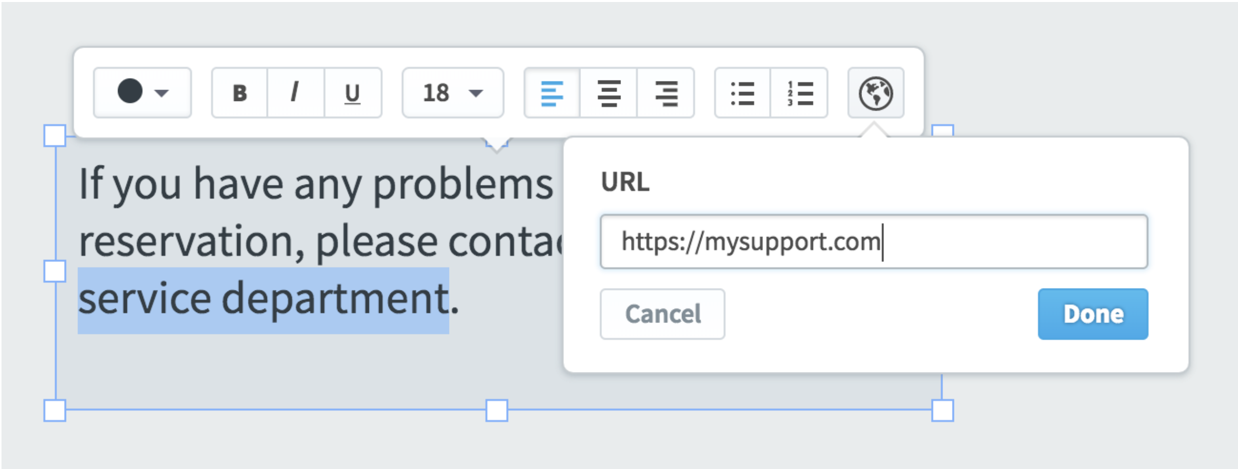


When we click the align top button, it moves all of the selected widgets to the highest point of all four widgets.



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.



Scorecards

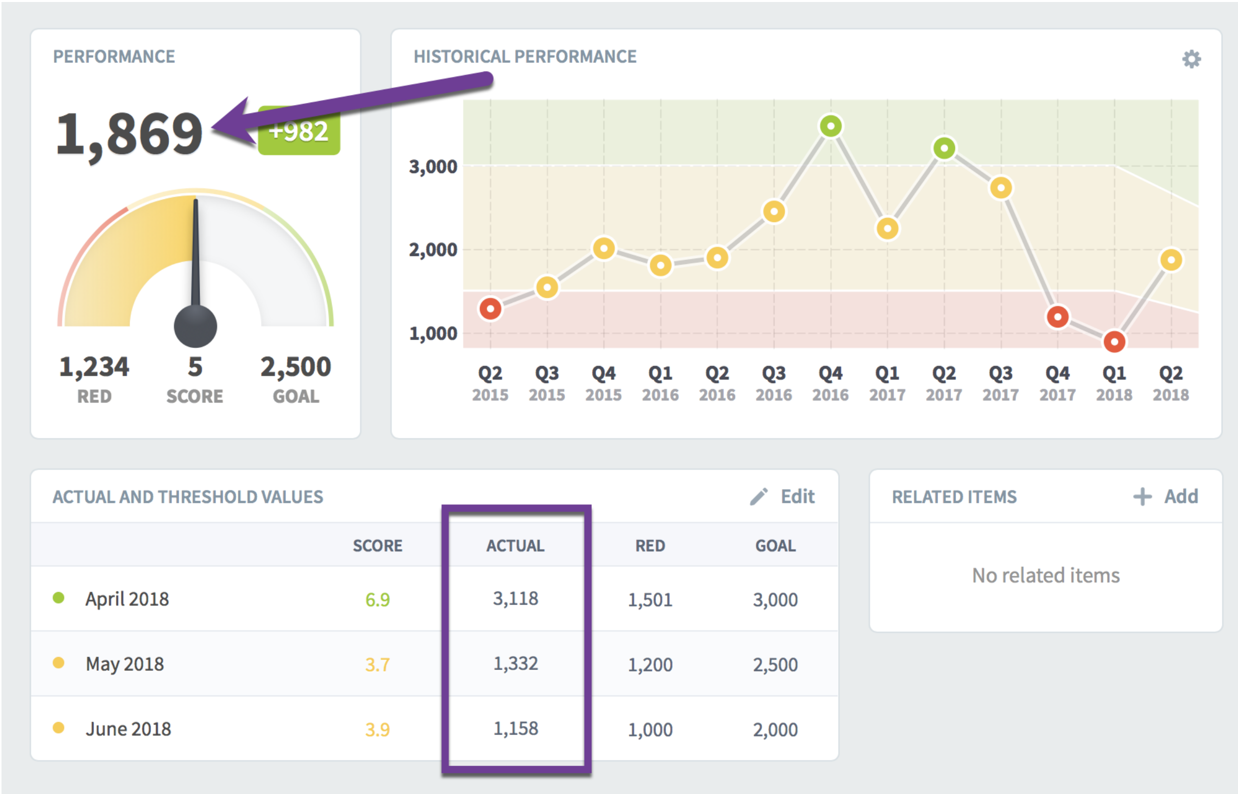
Exploring the data behind measure calculations

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."

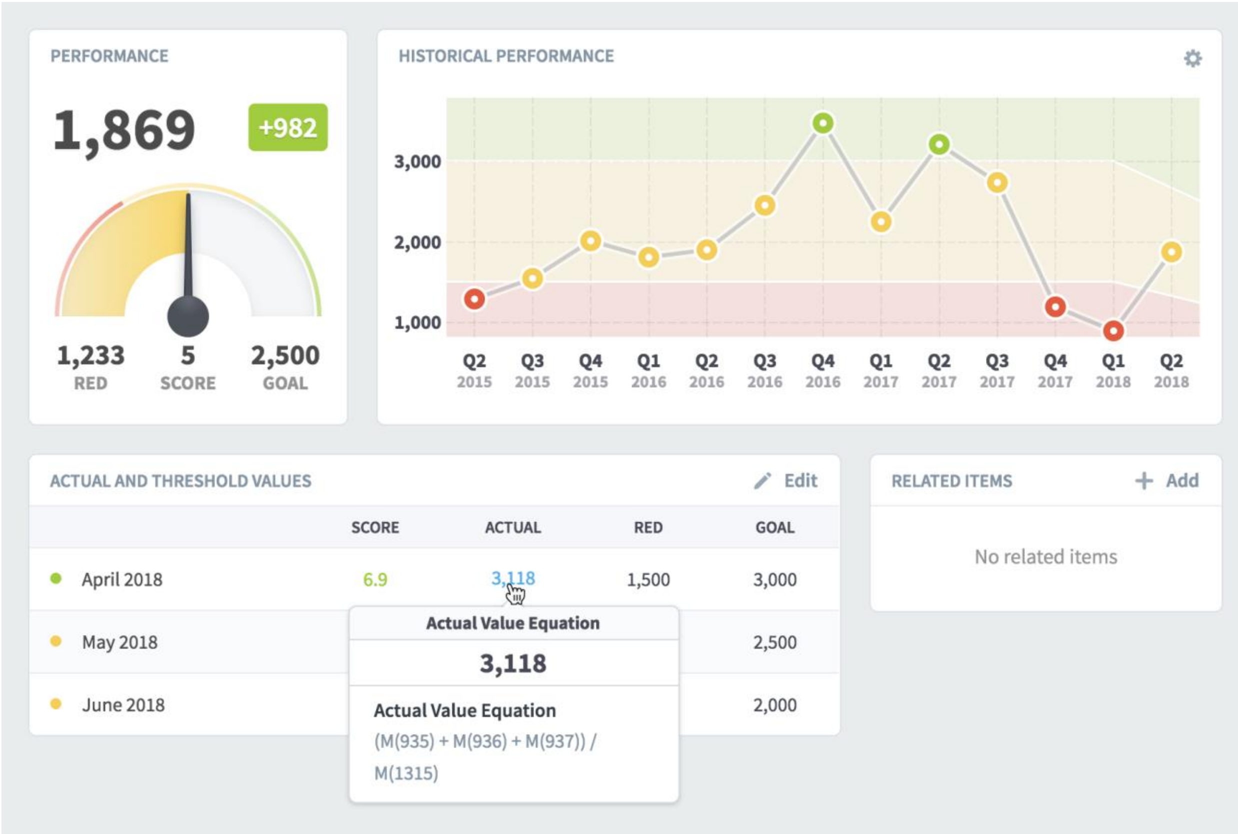
Although this explanation gets a little technical, don't worry, the software is easier to use than ever. The only thing that has changed is that you can hover your mouse over a number to see how it was calculated.

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.

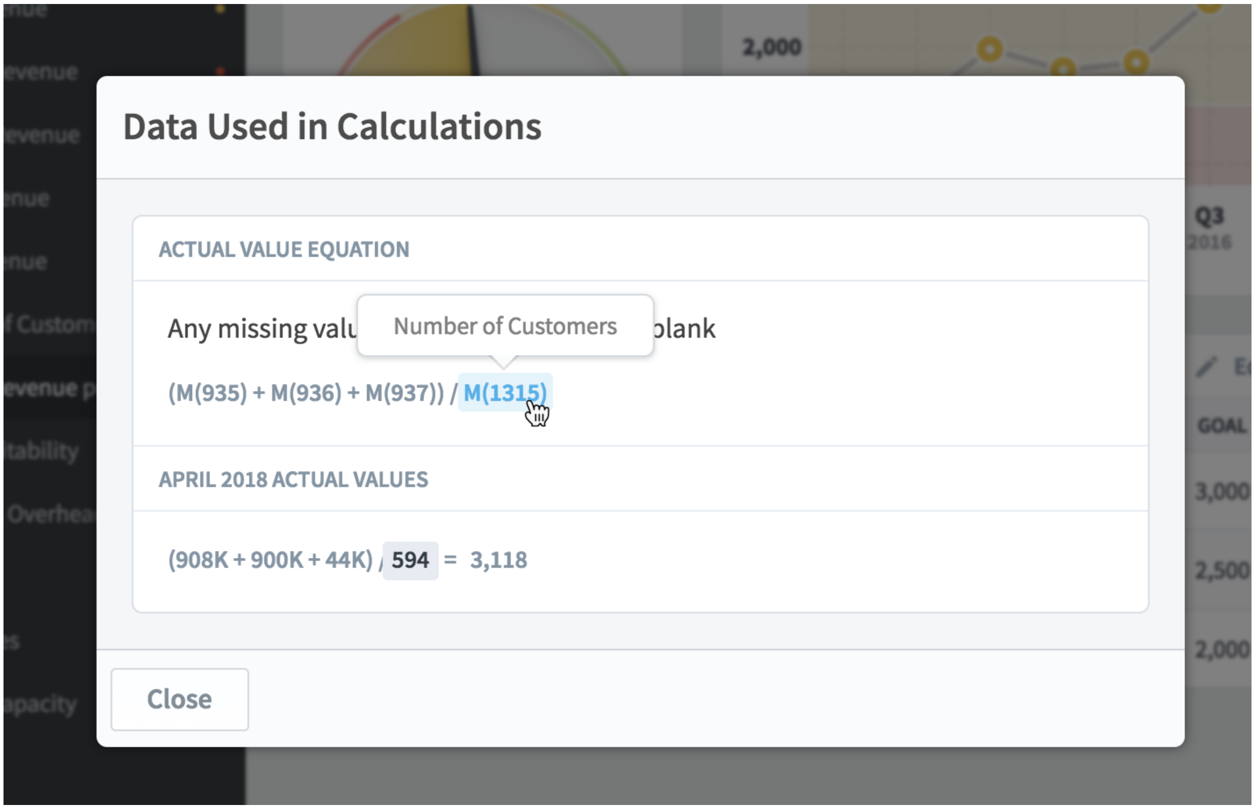
In this example, we're looking at a monthly measure in quarterly mode. The measure's aggregation type is average, so its quarterly total of 1,869 was determined by averaging its three monthly values listed in the "actual and threshold values" table.



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.

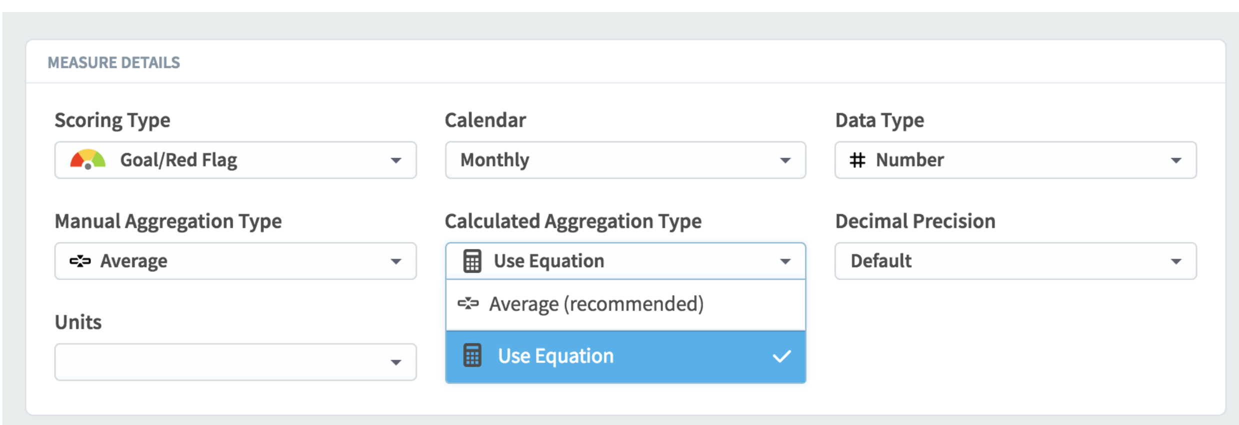


If you want to explore further, just click the monthly number that you're hovering over. This shows a dialog containing both the original equation and a version of the equation with April 2018 actual values substituted for the measure references. When you hover over individual parts of the equation,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

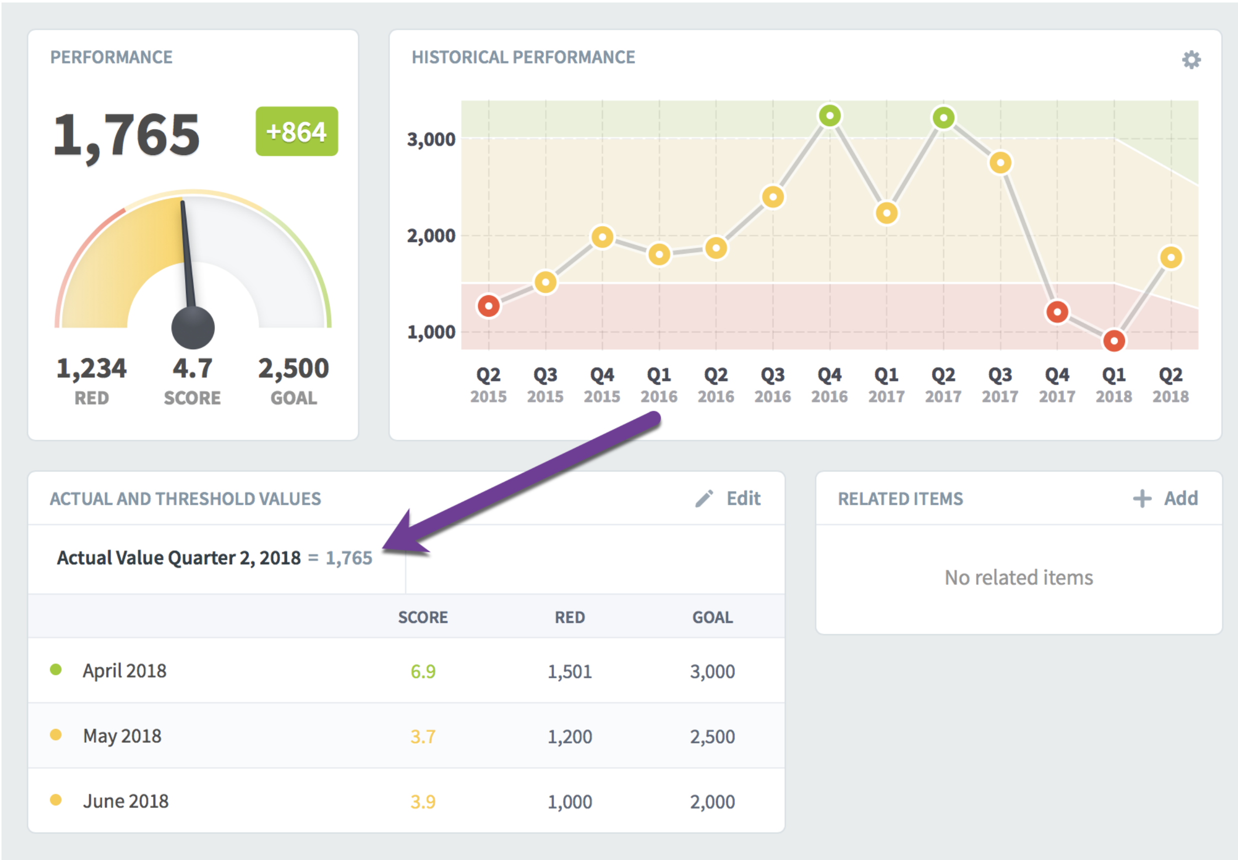


Finally, you can click on any of these measure references to go to that measure's Scorecard Overview tab. By doing this, you can trace down complicated nested equations to find out exactly where a calculated number comes from.

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."



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.

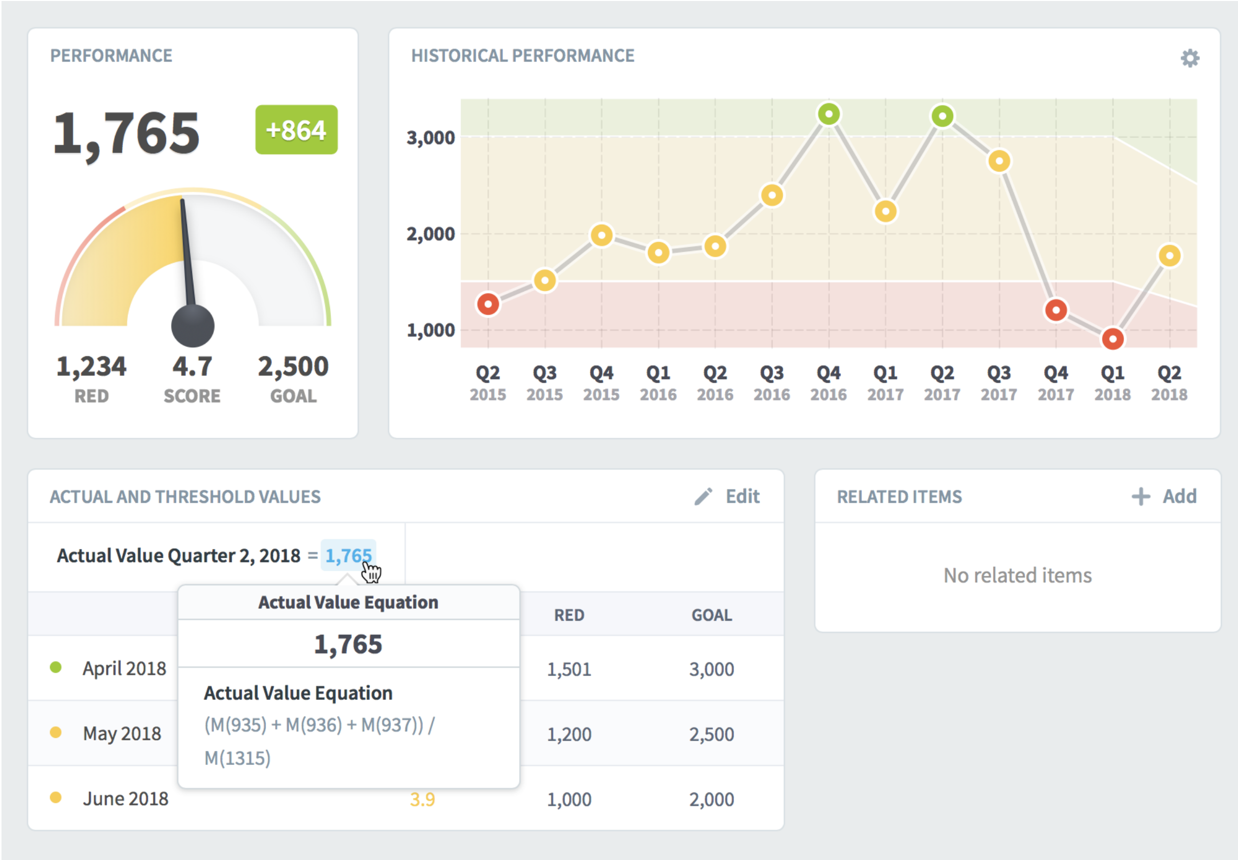


What's happening is that we changed the way the measure's quarterly value is calculated when we changed the calculated aggregation type. The software's layout in version 3.2 now reflects that.

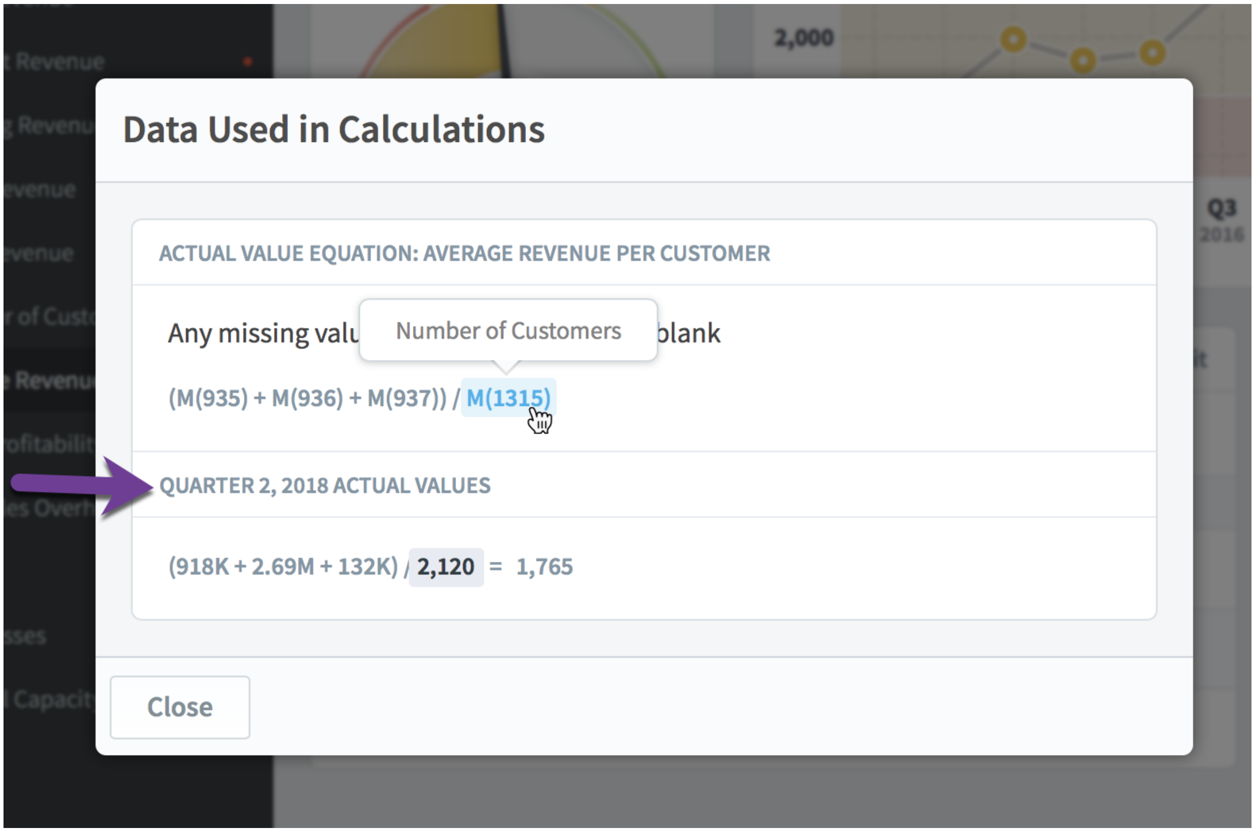
As we saw earlier, this measure's actual value is calculated, and its calculated aggregation type is now "use equation" rather than "average." The "average" aggregation type calculated each of this measure's monthly values and then averaged them. The "use equation" aggregation type does things in the 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.

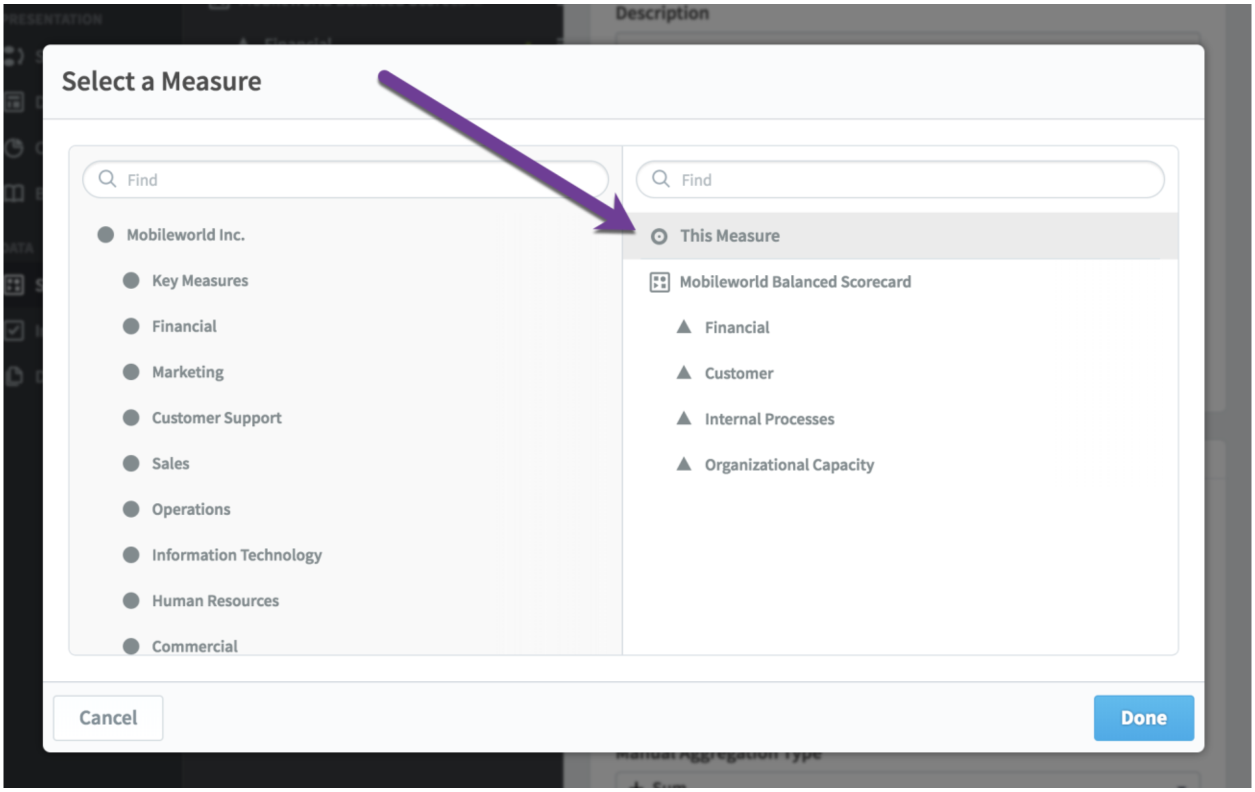


And, like before, clicking on the calculated number shows a dialog. This time, however, the equation is using quarterly values rather than monthly. You can see that each of the measures in the equation have first been aggregated on their own, because their Quarter 2 values are used in the equation.



Choosing “this measure” for calculated measure equations

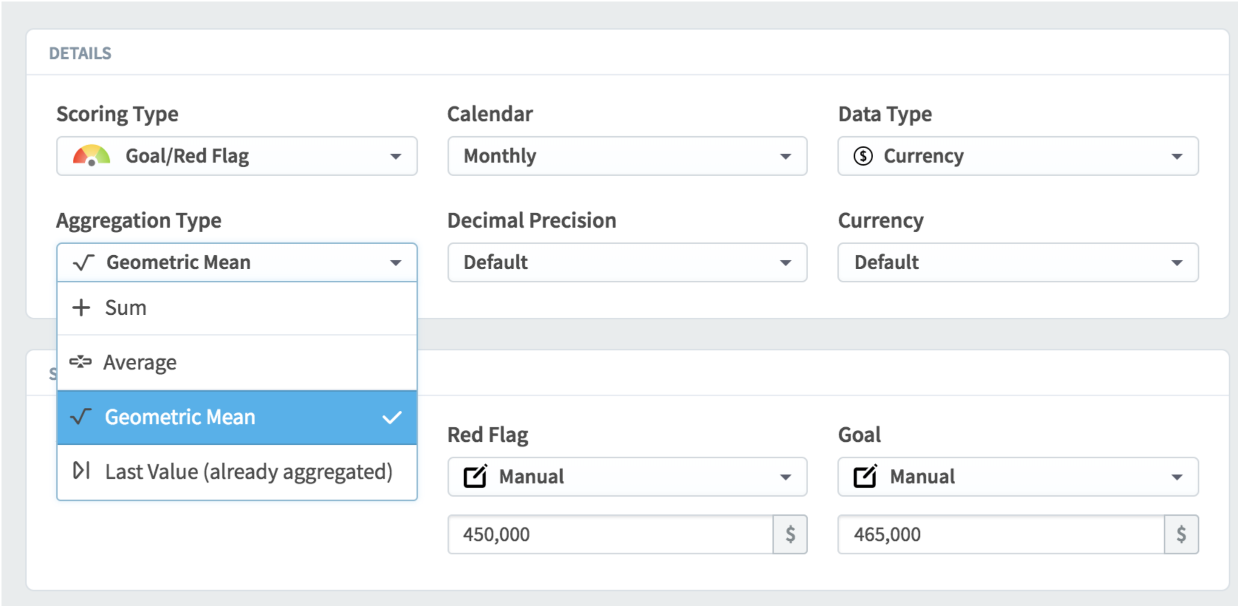
You can now choose “this measure” when building equations. This allows you to make self-referential equations, for example goals that are 10% higher than the previous year’s actual value.



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^{th} root of a product of n numbers.

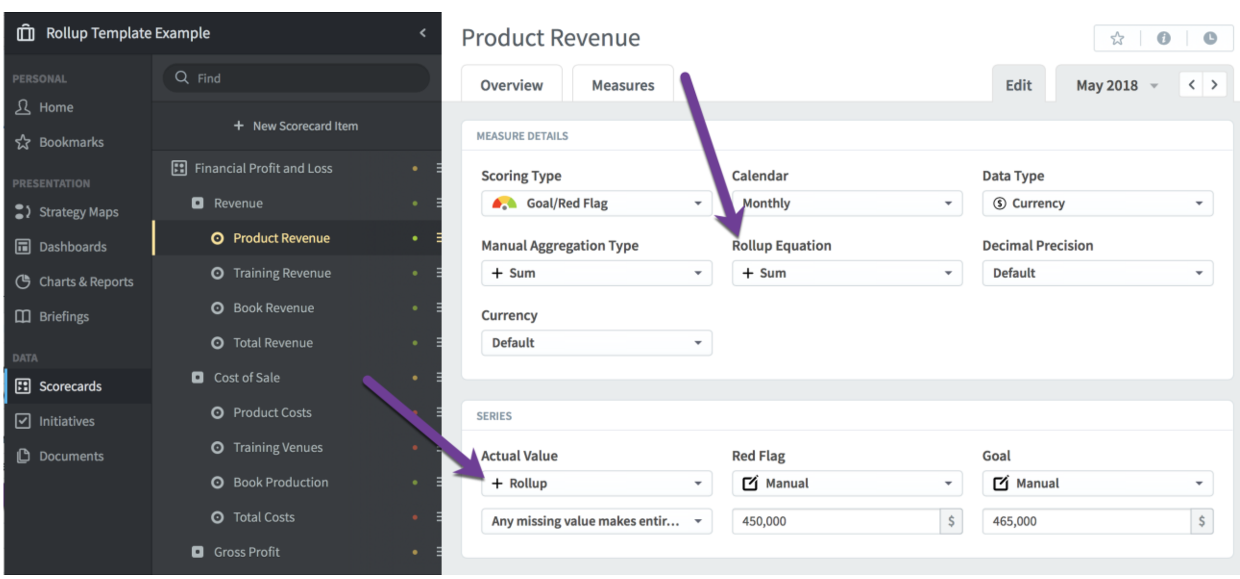
In practice, the math is fairly simple. With the "average" aggregation type, three numbers are aggregated using $(a + b + c)/3$. For geometric mean, the equation is $\sqrt[3]{a * b * c}$.



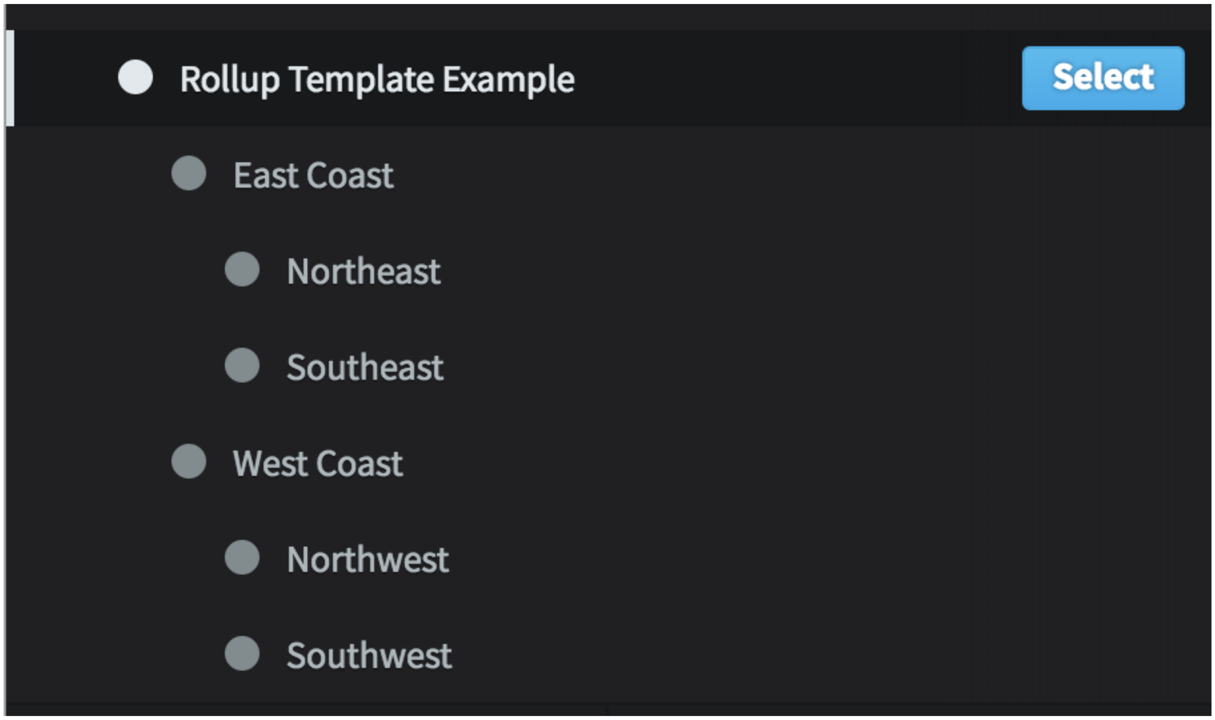
Automatically rolling up measures across organizations

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.

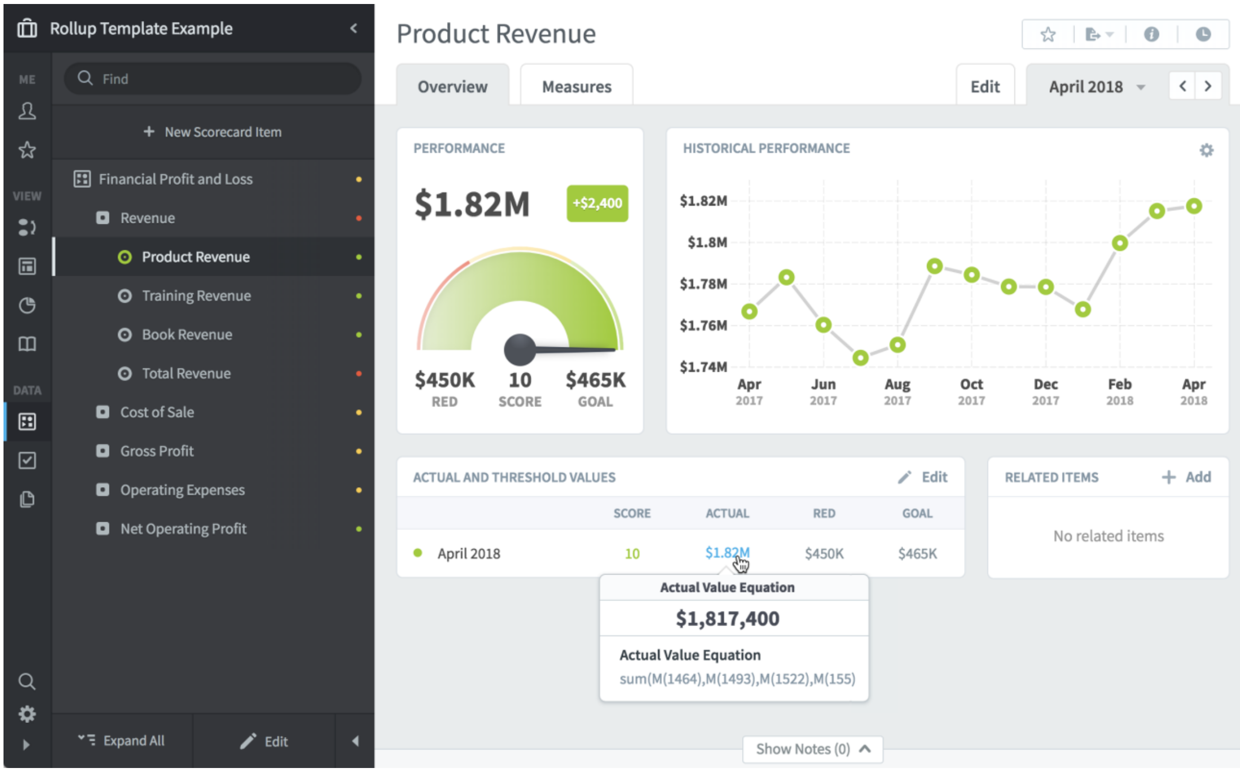


Once you've created your organization with rollup measures, the next step is to create templated copies of that organization in a tree structure. In this example, "Rollup Template Example" is the template organization we built, and the six organizations underneath it are templated copies.

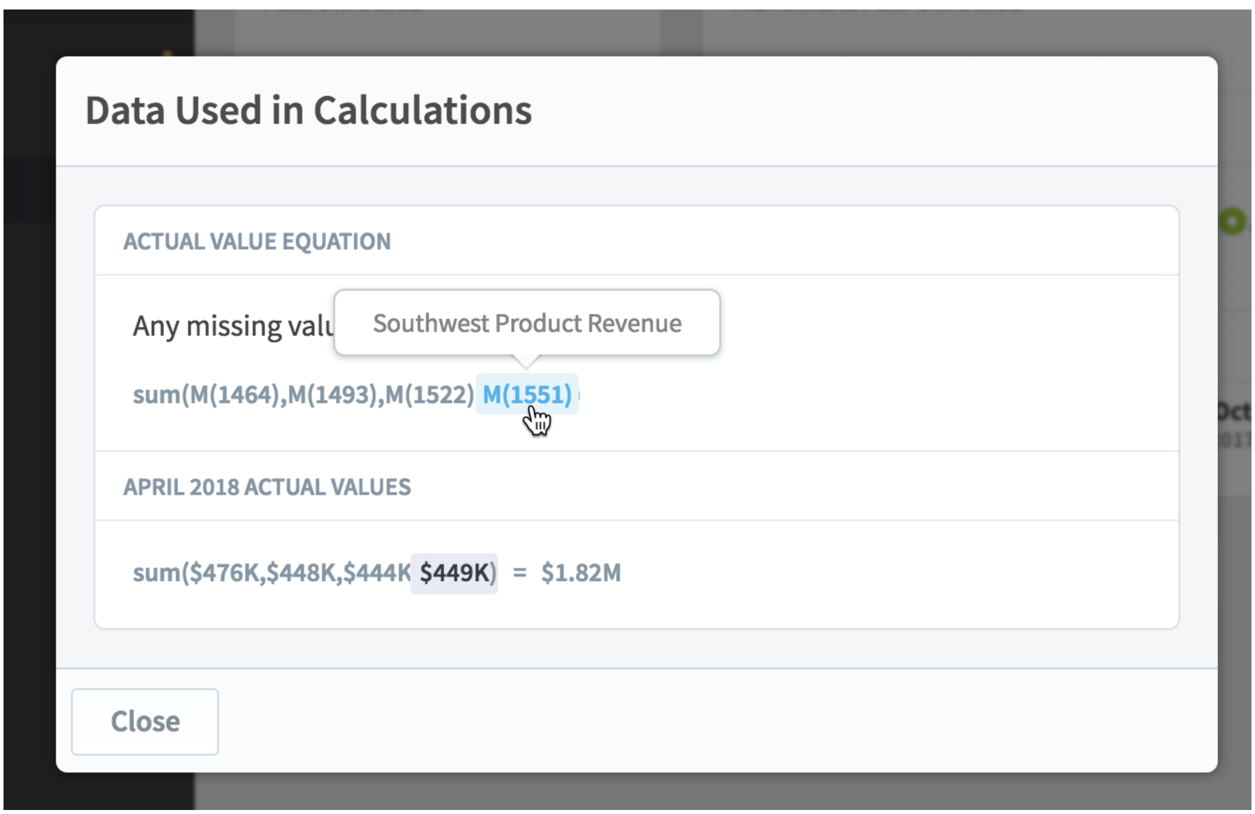


Finally, update the measures in the organizations at the bottom of the organization tree. The measures in the organizations higher up the tree will automatically have calculated values based on the measures in lower organizations.

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.

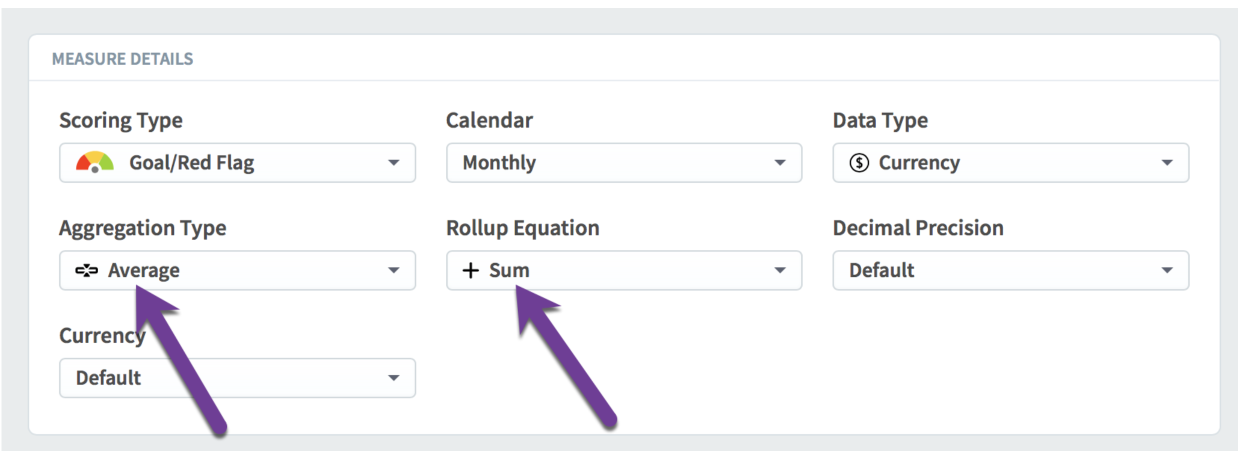


By hovering over the different parts of the equation, we can see that this highest-level measure is the sum of the measures in the four organizations at the bottom of the tree. If you remember, though, the rollup tree is three levels deep. Why is the automatic rollup equation skipping the middle level 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.



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.

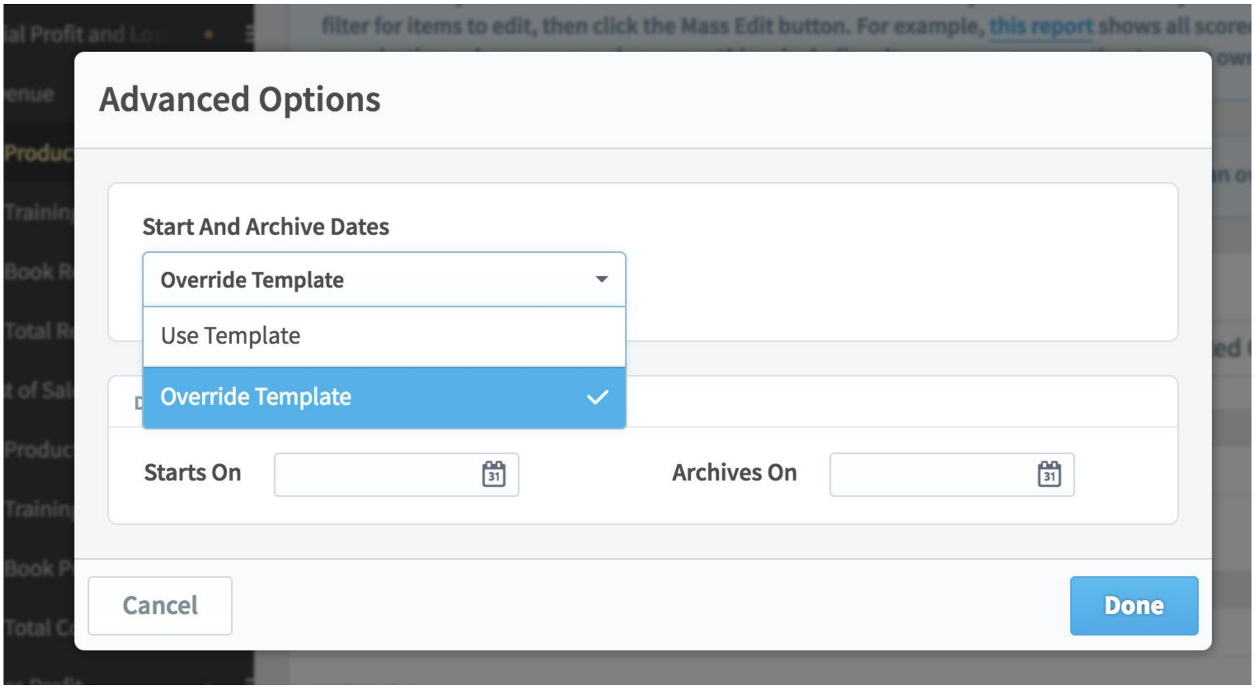
For this measure, an average aggregation type makes the most sense. If you measure the number of broken trucks every week, and average those numbers over a year, you can good a good feel for how many trucks are out of service most of the time.

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.

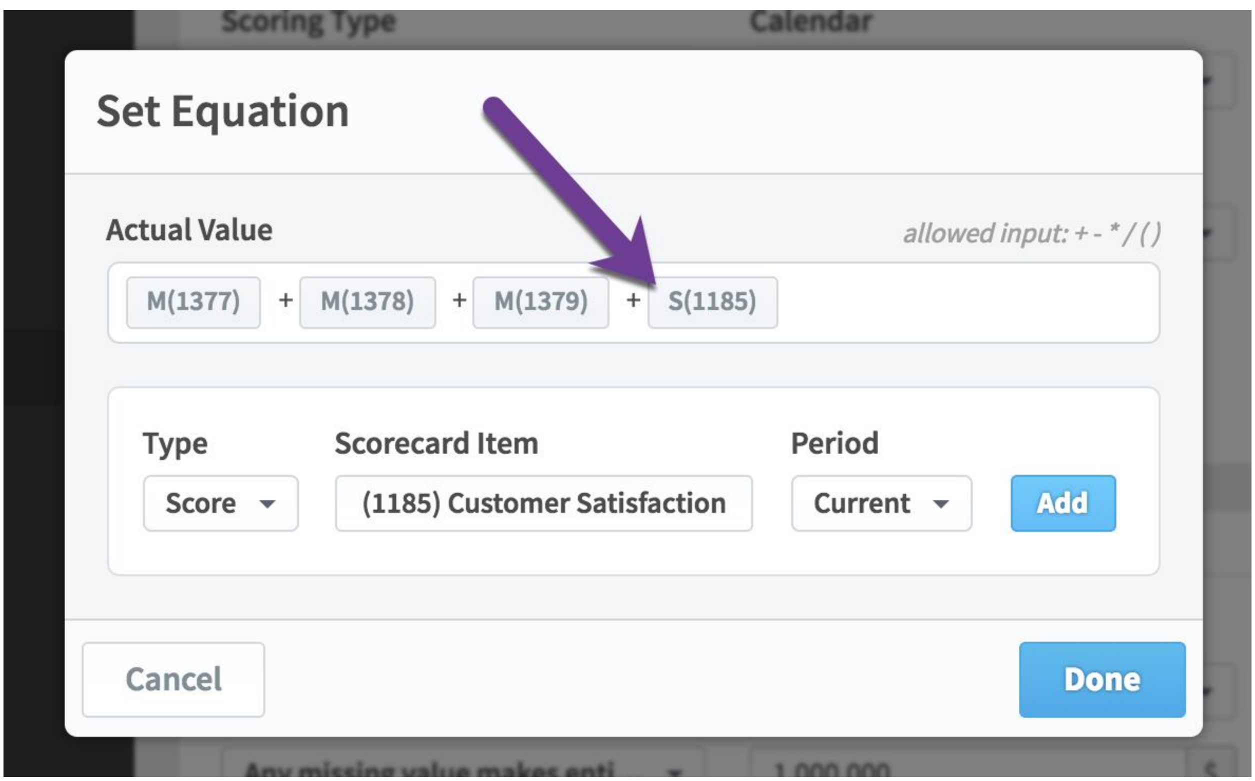
Editing start and archive dates on templated copies

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.



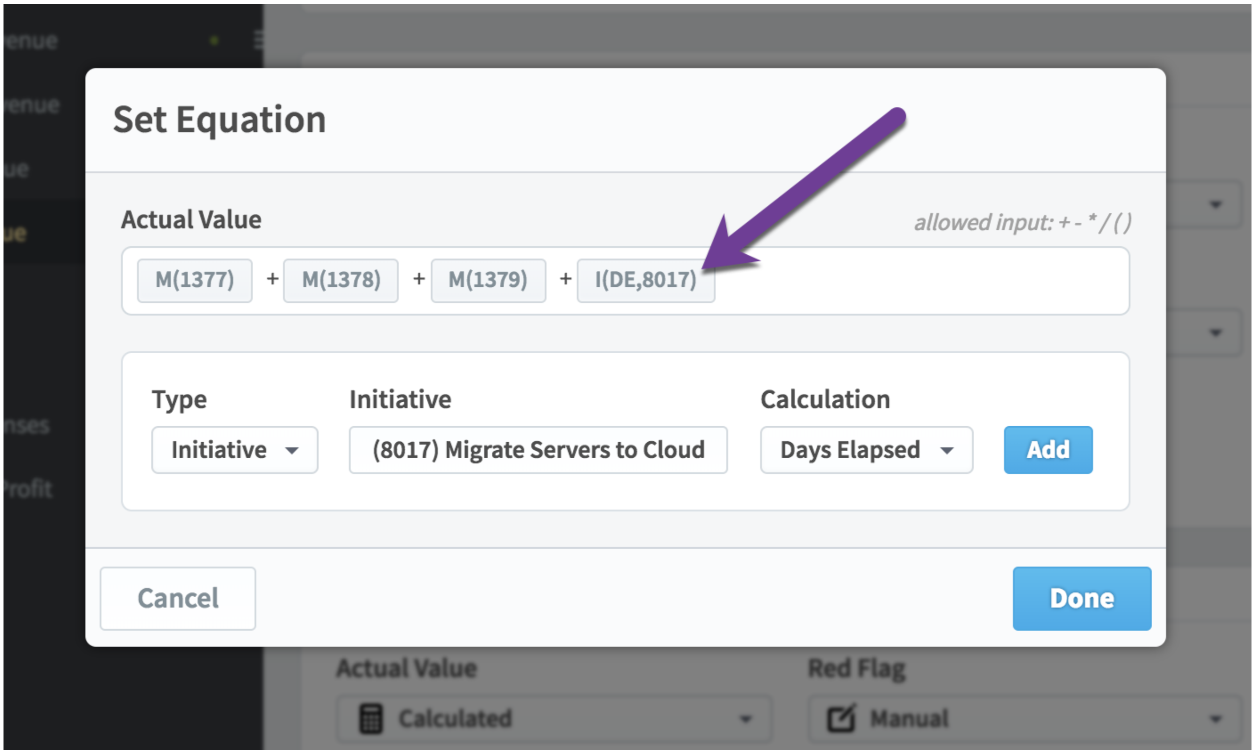
Using non-measure scores in equations

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.



Using initiative days elapsed in measure equations

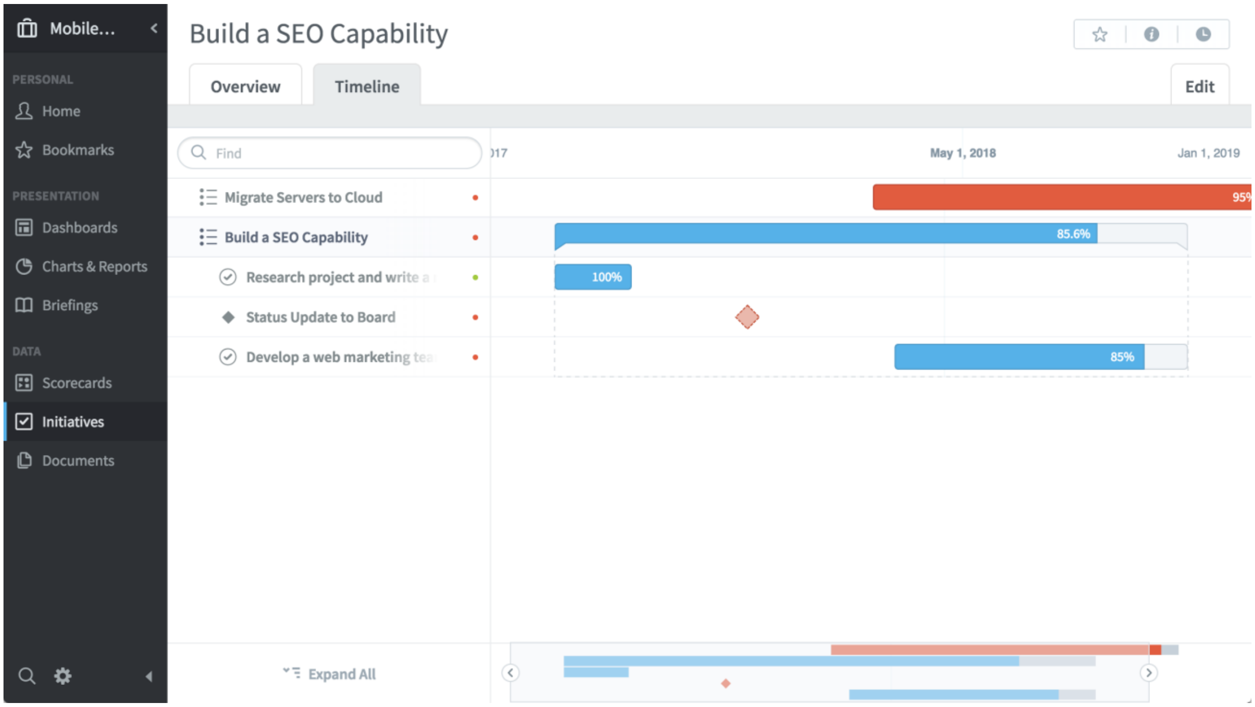
You can now reference in measure equations how many days have passed since an initiative started. The syntax is the same as referencing other initiative fields: `I(DE,XXX)` where XXX is the initiative item ID.



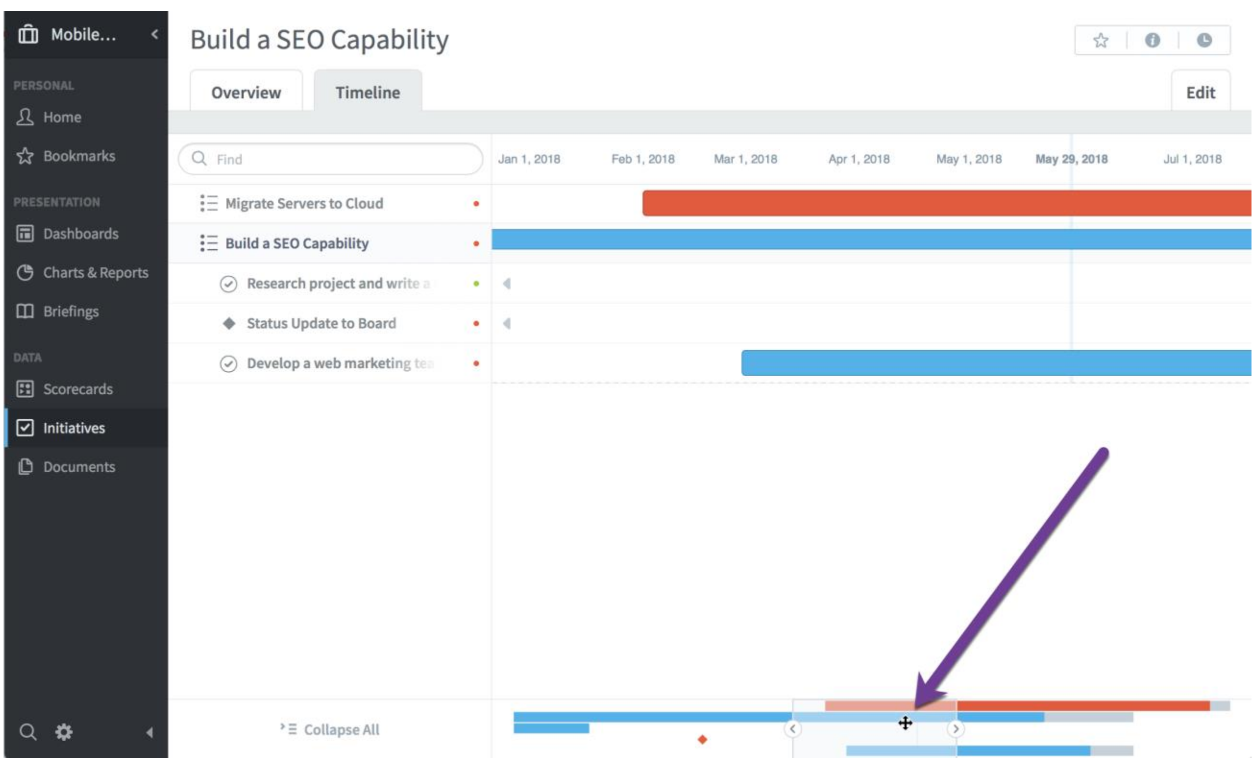
Initiatives

Initiatives timeline tab

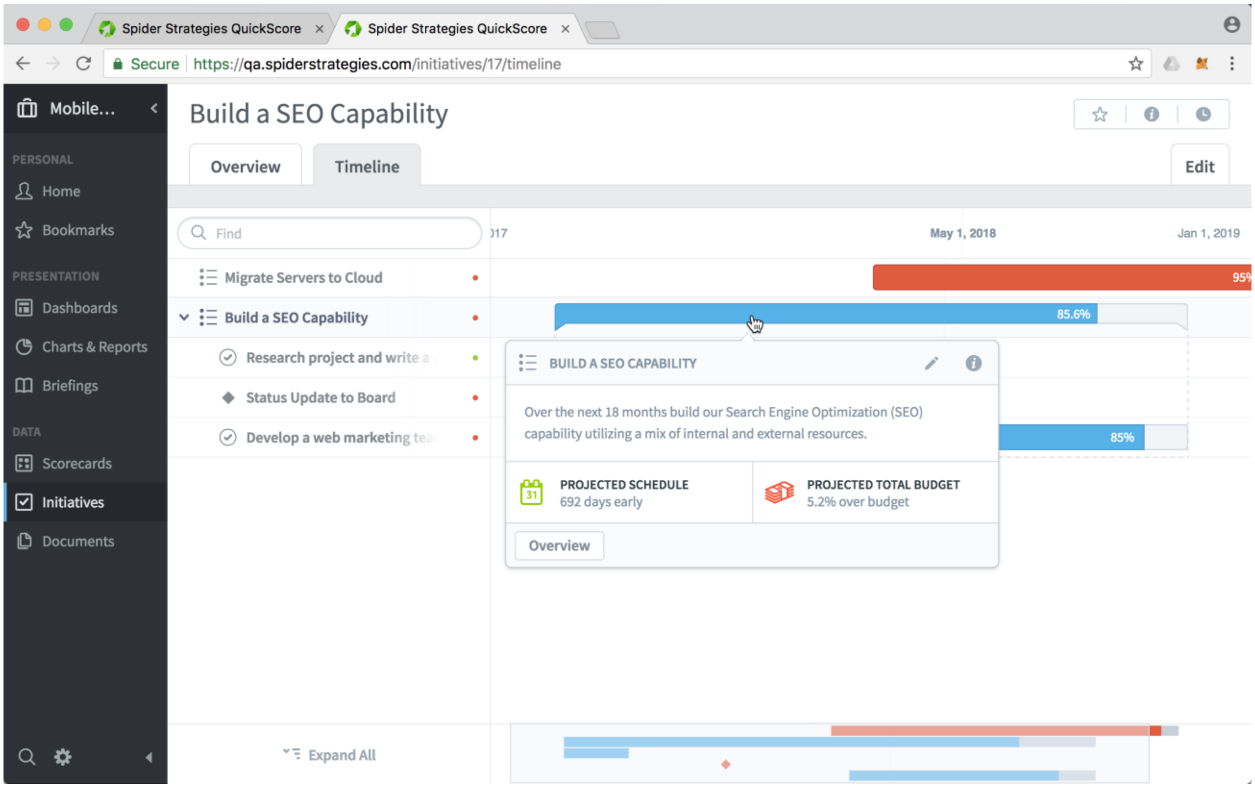
One of the biggest new features in version 3.2 is the new Timeline tab in the Initiatives section. It shows you a fully interactive Gantt chart view of the current organization's initiatives.



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.



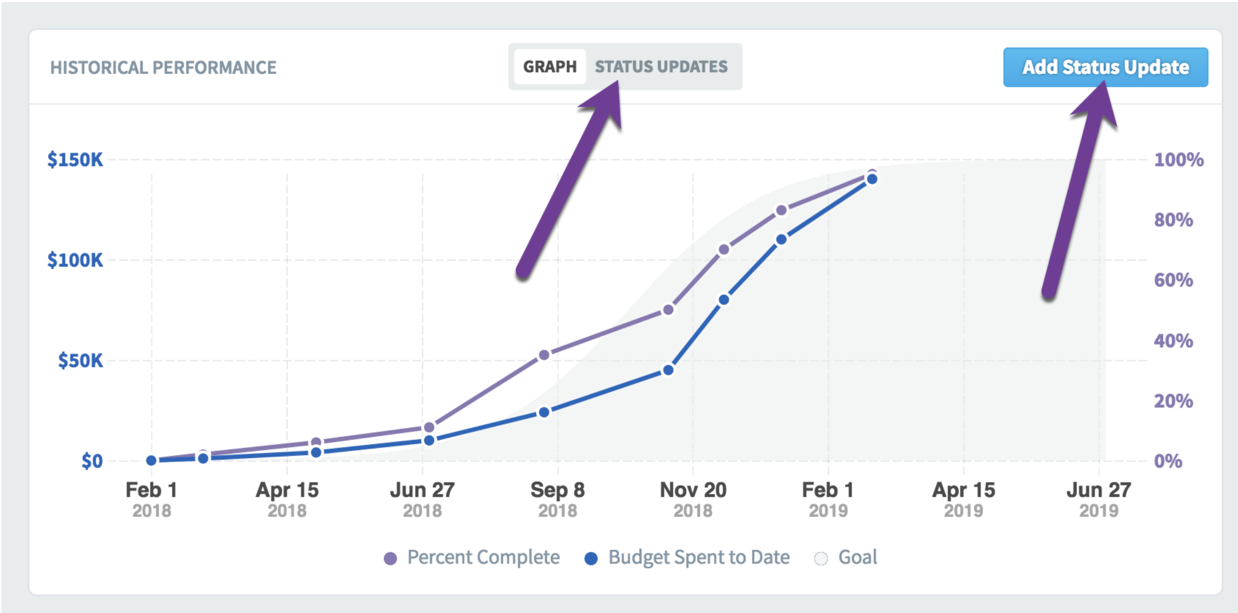
If you click on any of the initiative items in the Gantt chart, you can see detailed information about that item, like its description and the projected budget and schedule performance.



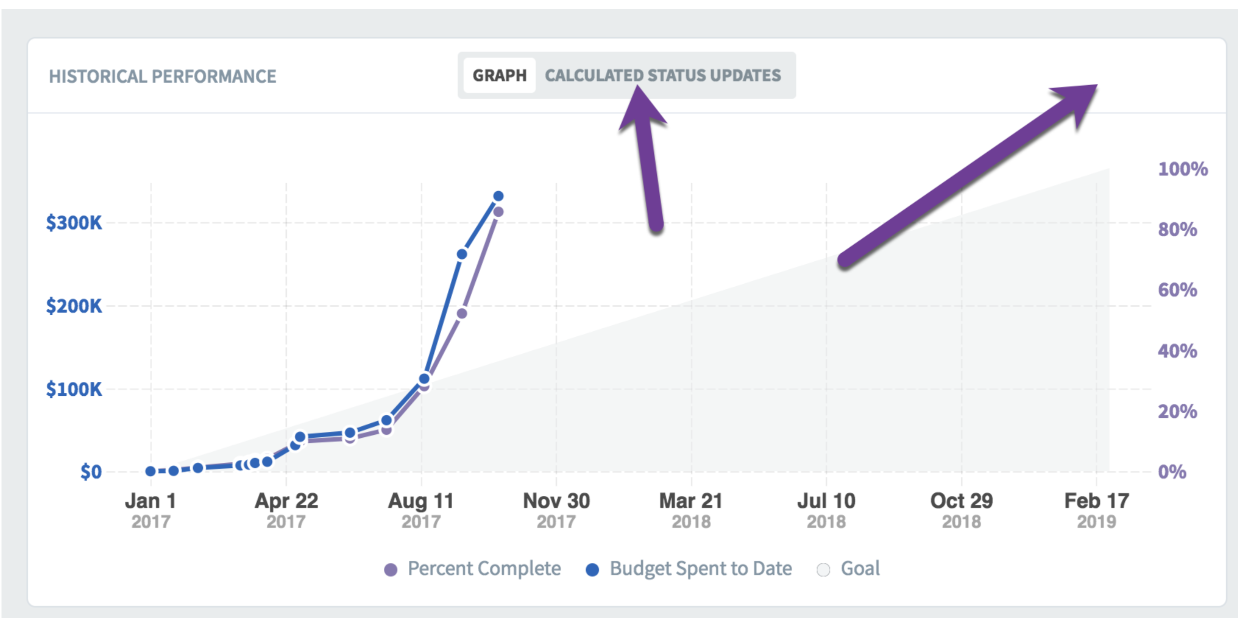
Exploring the data behind initiative status updates

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.

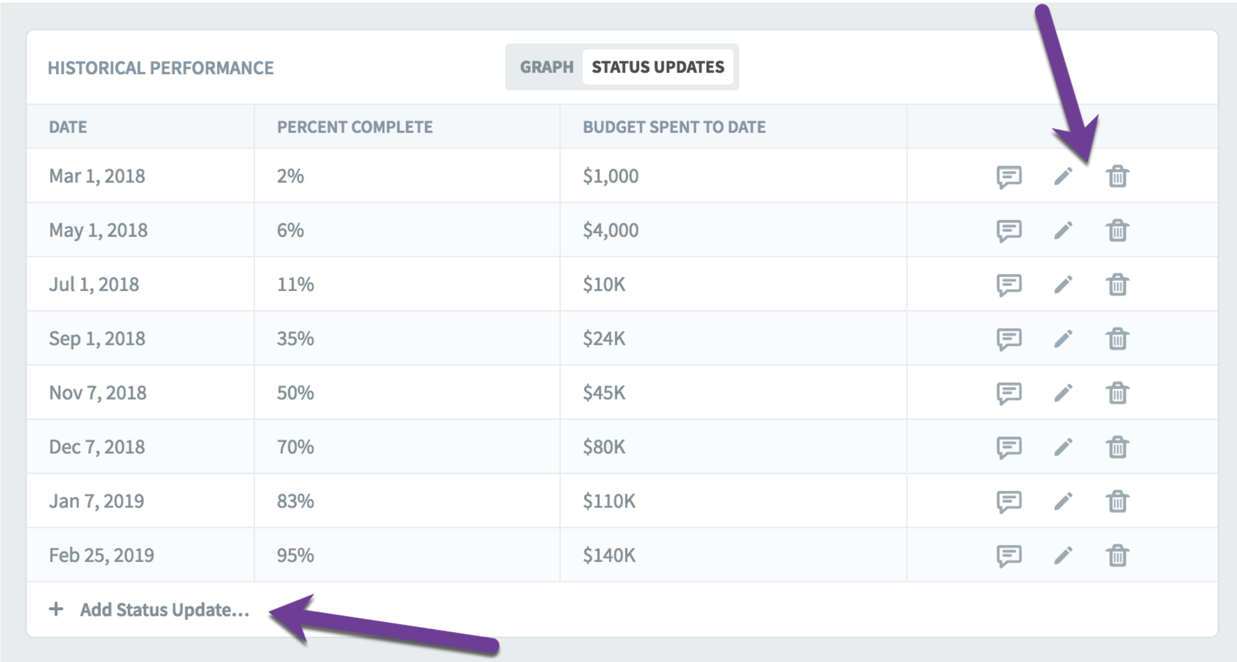
For example, this is what the historical performance chart looks like when an initiative's status has been updated manually. There's an "Add Status Update" button in the upper right corner, and you can click a toggle to change from viewing the "graph" to seeing "status updates."



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.

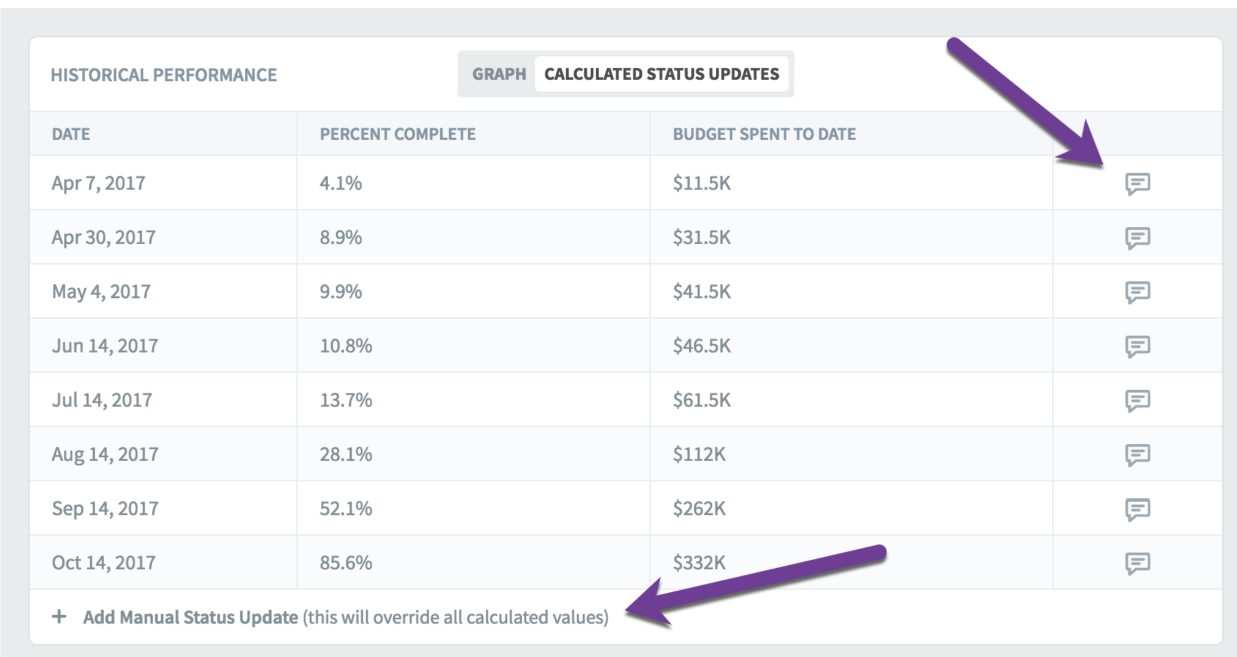


HISTORICAL PERFORMANCE — GRAPH | STATUS UPDATES

DATE	PERCENT COMPLETE	BUDGET SPENT TO DATE
Mar 1, 2018	2%	$1,000
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

+ 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 PERFORMANCE — GRAPH | CALCULATED STATUS UPDATES

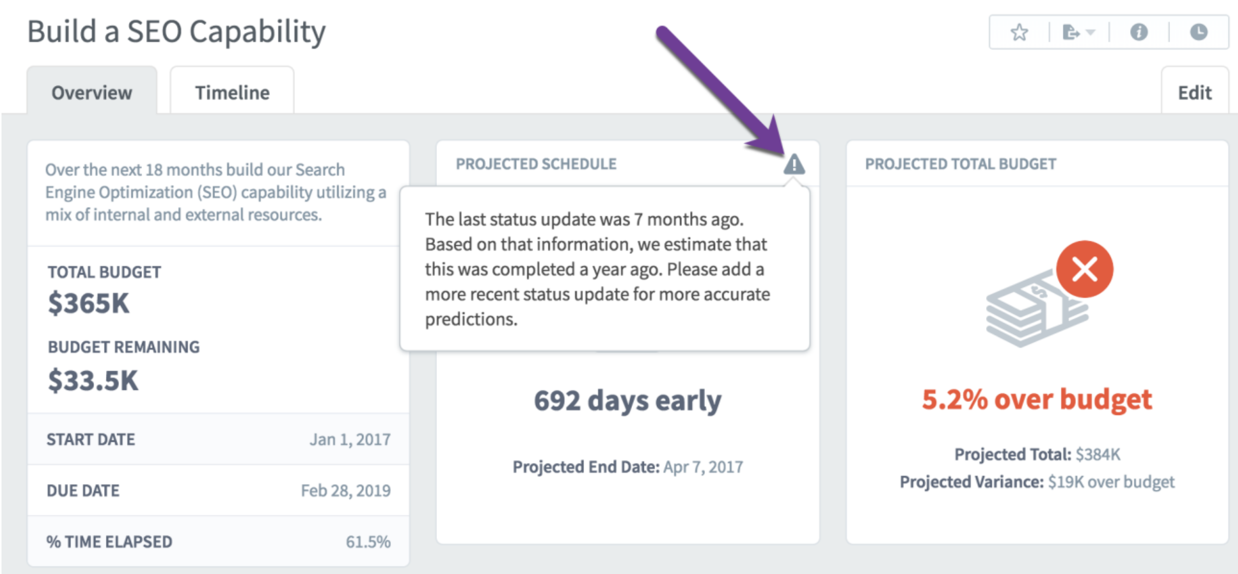
DATE	PERCENT COMPLETE	BUDGET SPENT TO DATE
Apr 7, 2017	4.1%	$11.5K
Apr 30, 2017	8.9%	$31.5K
May 4, 2017	9.9%	$41.5K
Jun 14, 2017	10.8%	$46.5K
Jul 14, 2017	13.7%	$61.5K
Aug 14, 2017	28.1%	$112K
Sep 14, 2017	52.1%	$262K
Oct 14, 2017	85.6%	$332K

+ **Add Manual Status Update** (this will override all calculated values)

Indicator for projected initiative end-dates

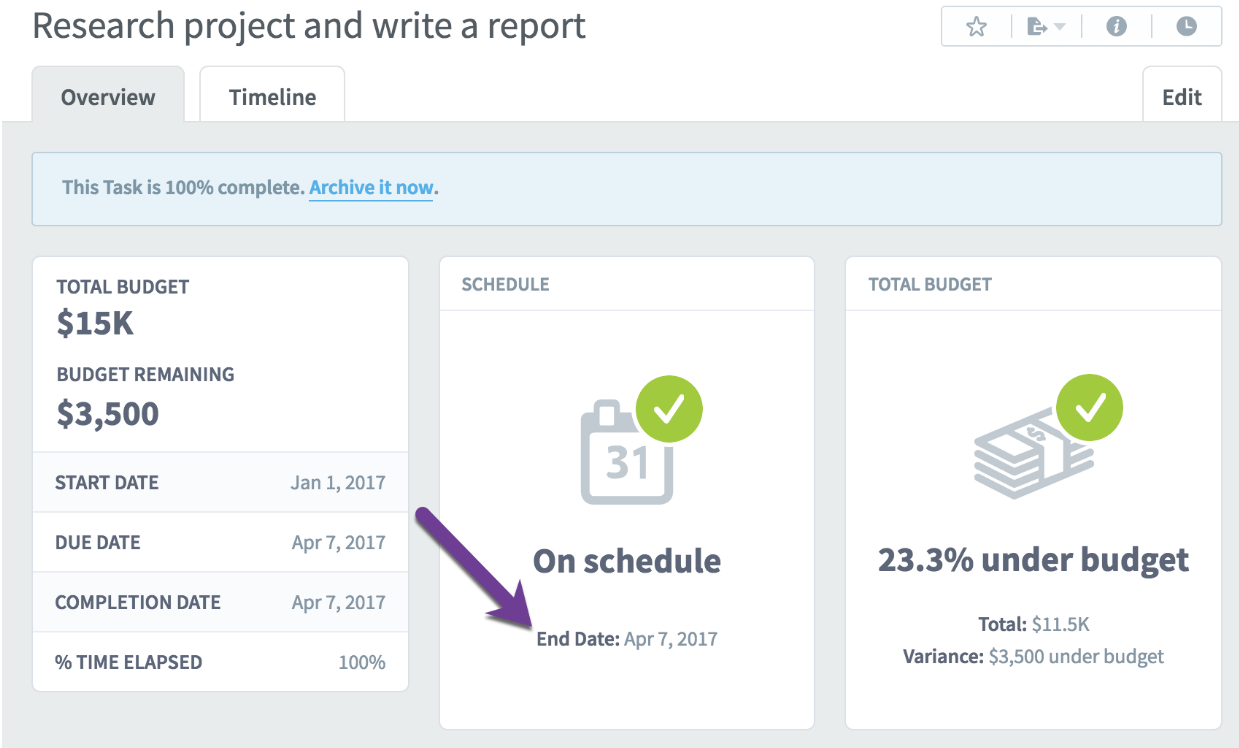
QuickScore automatically predicts when an initiative will be finished and what its budget will be at completion. These predictions start to fall apart, however, when initiatives don't get regular status updates.

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

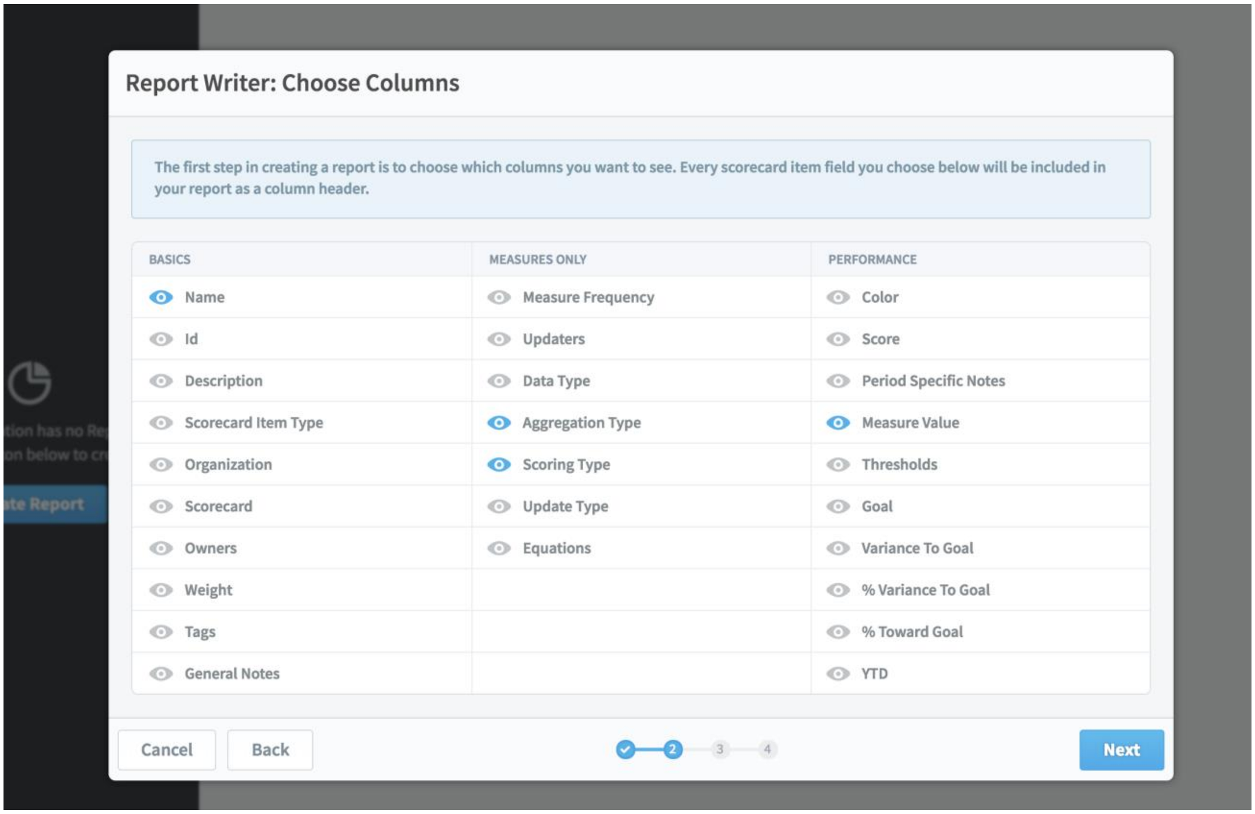
When an initiative item is 100% complete, its "Projected End Date" now just says "End Date." This is one of dozens of small refinements in QuickScore 3.2.



Reports

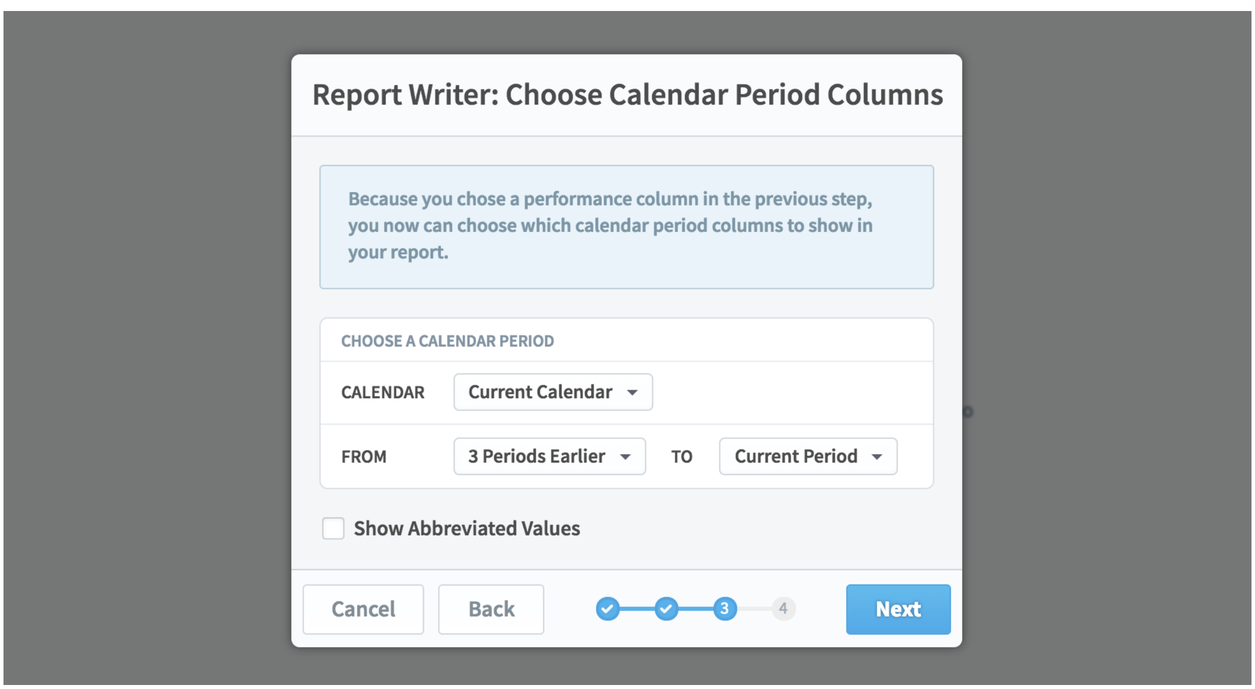
New report writer flow

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.

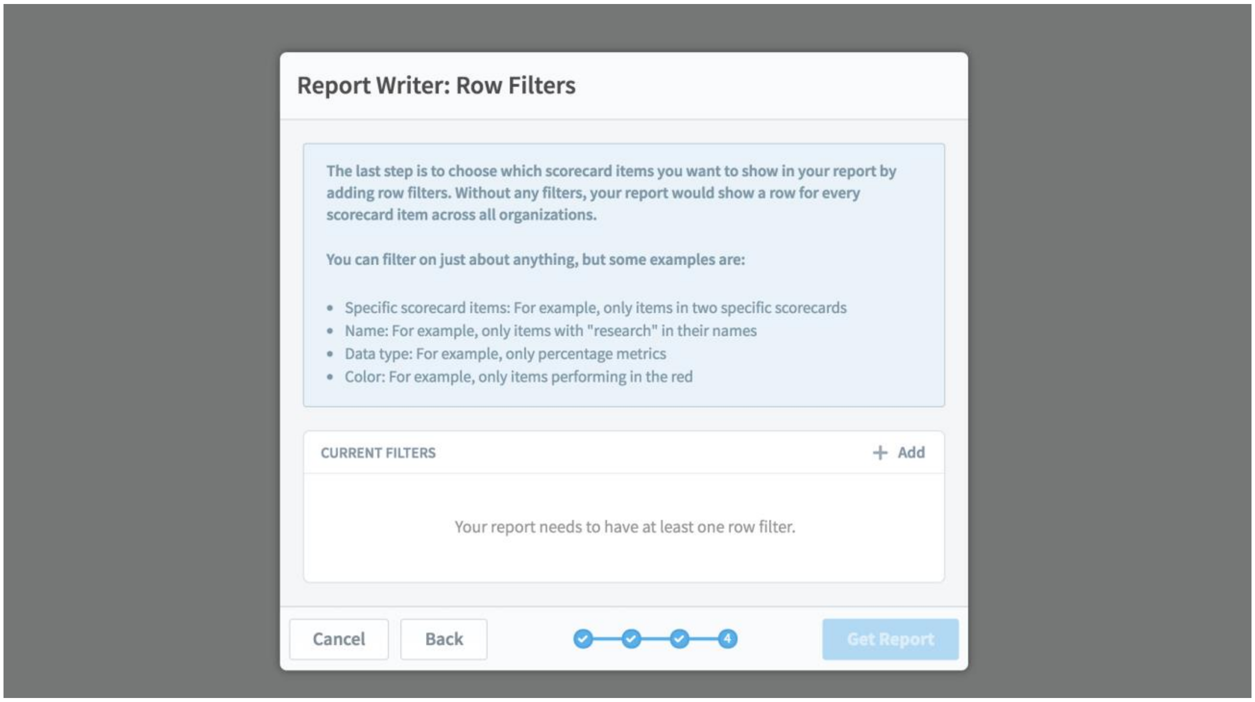


We’ve also reorganized this column selection step to group columns into basics, measures only, and performance.

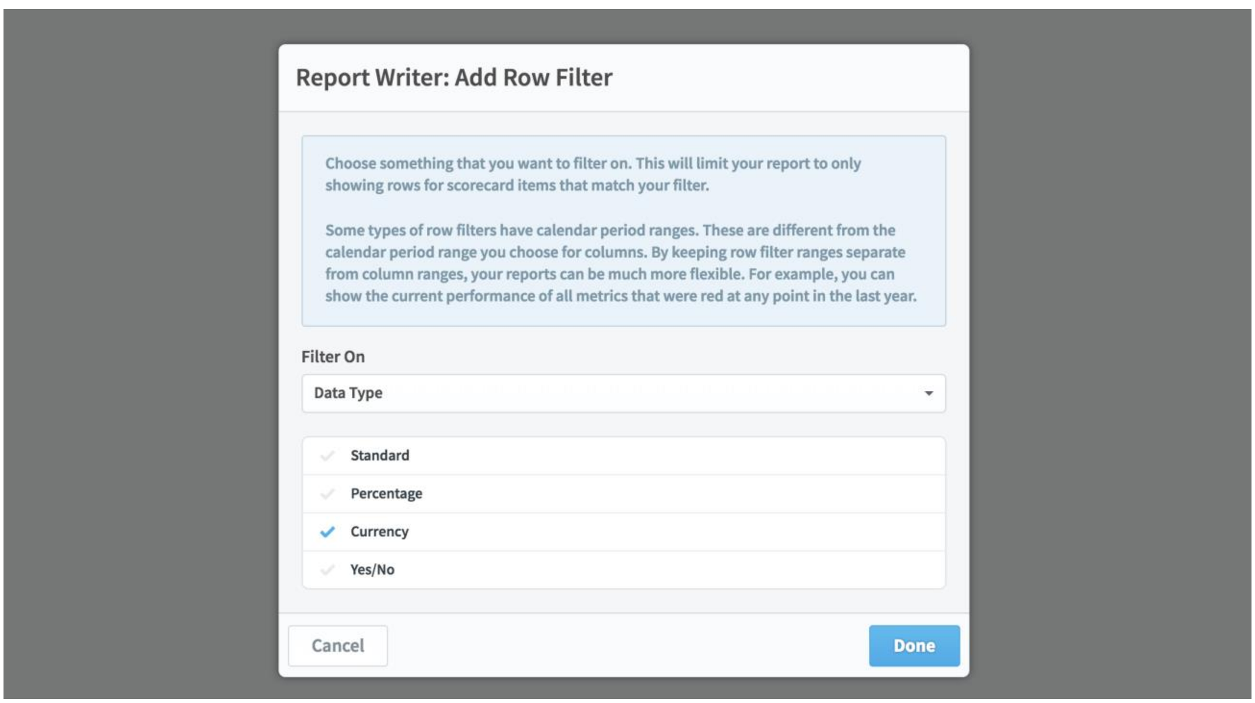
If you choose any performance columns, the next step is choosing which calendar periods you want to show for those performance values.



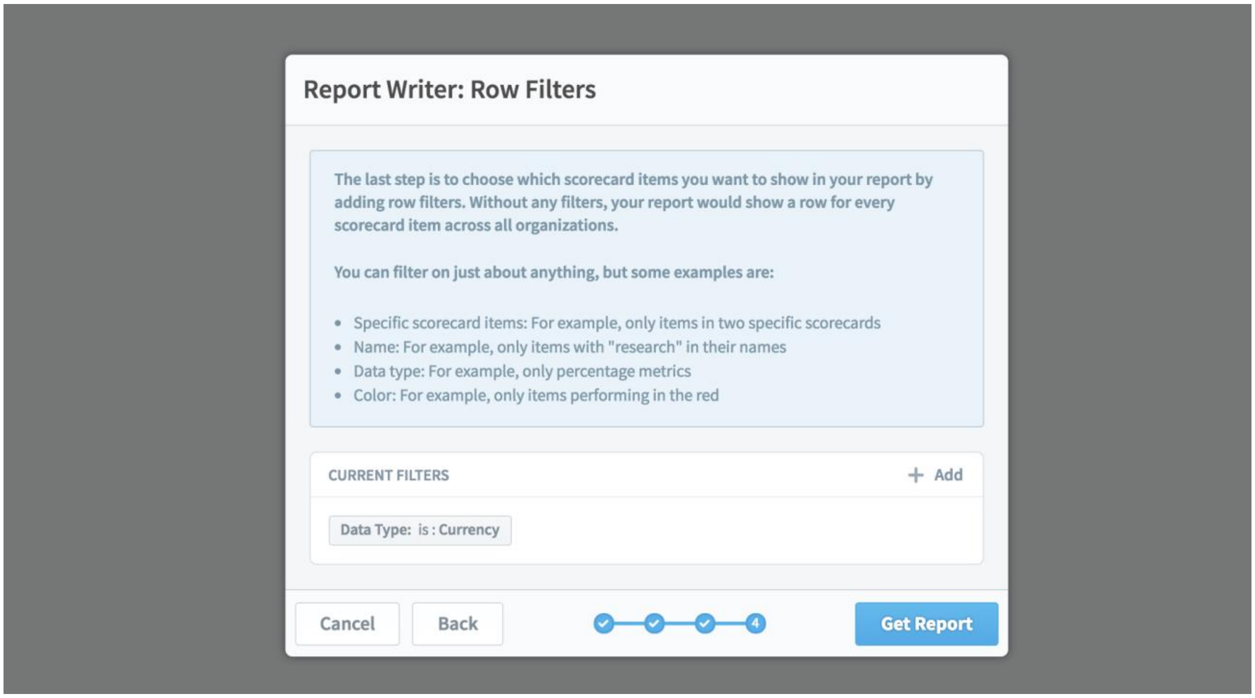
The final step is choosing filters. This is what it looks like when you haven't added any filters yet.



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

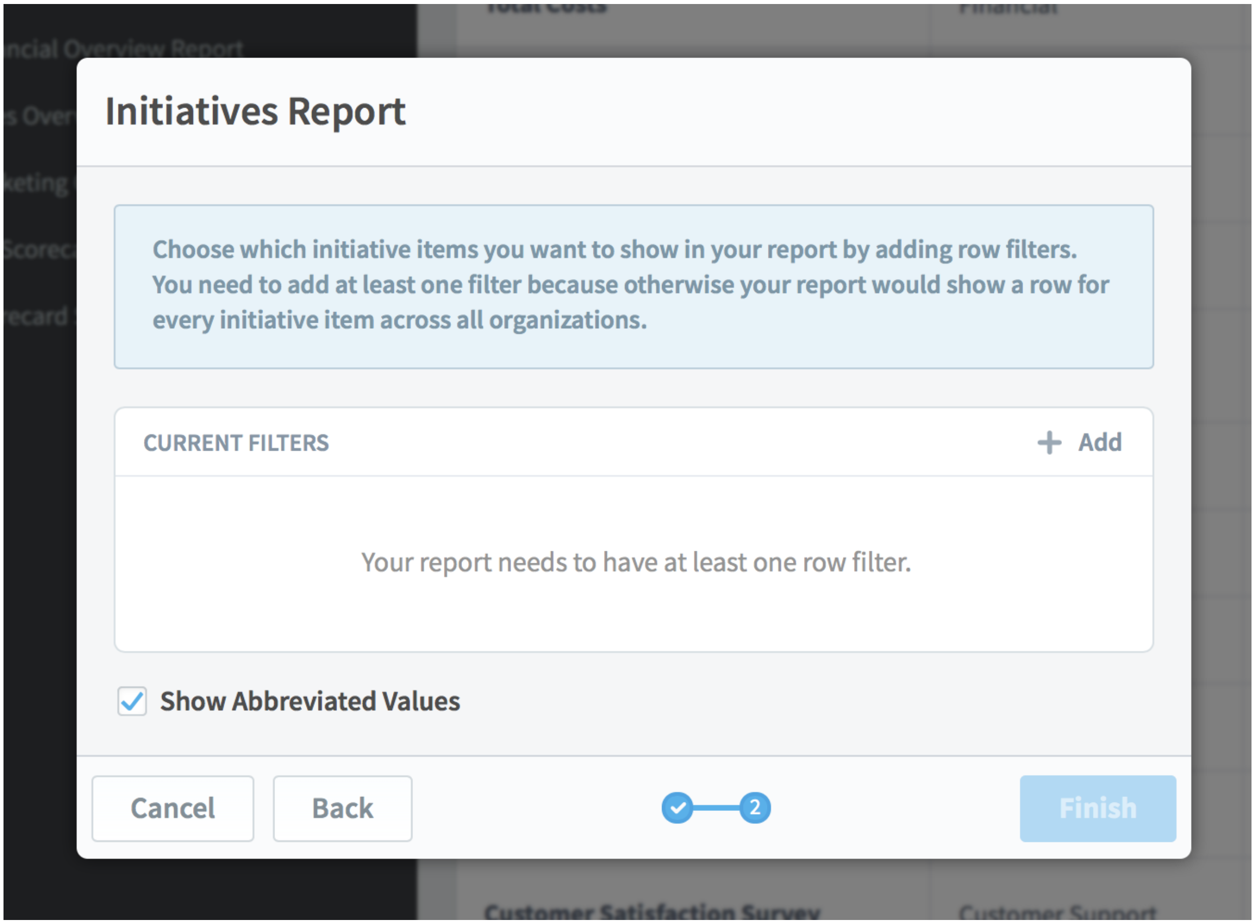


After clicking “done” we can see the filter we added, and we’re able to click the “get report” button.

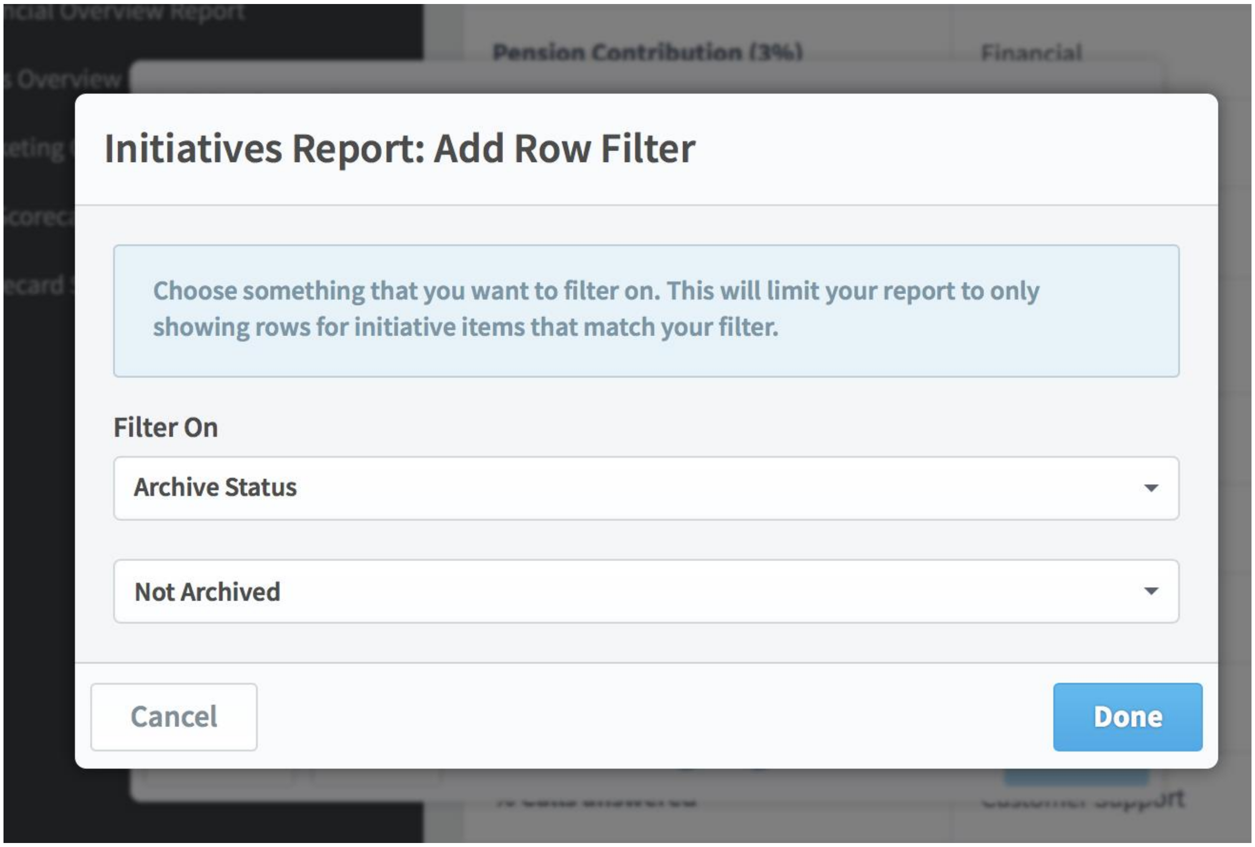


New initiatives report

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.



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

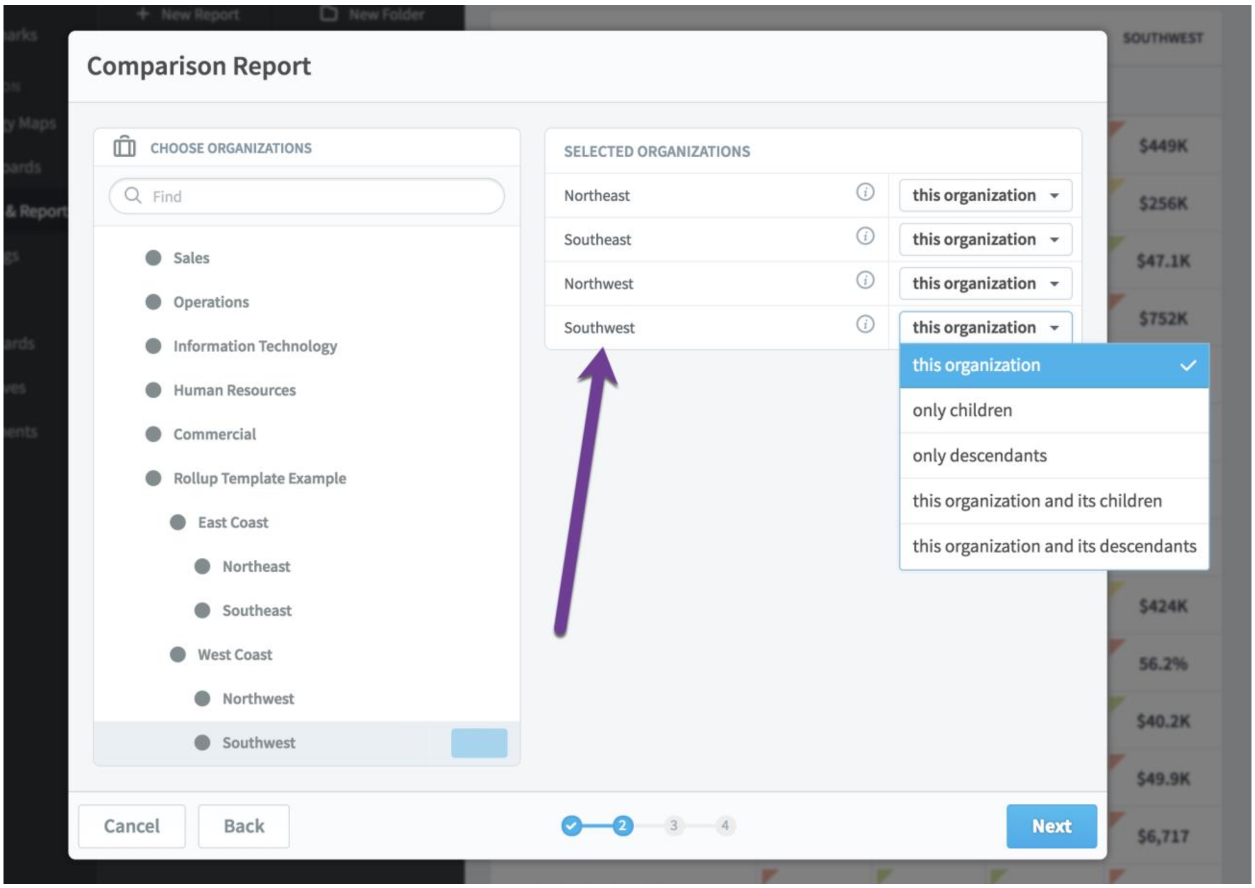


And here's our initiatives report showing all initiative items that aren't archived.

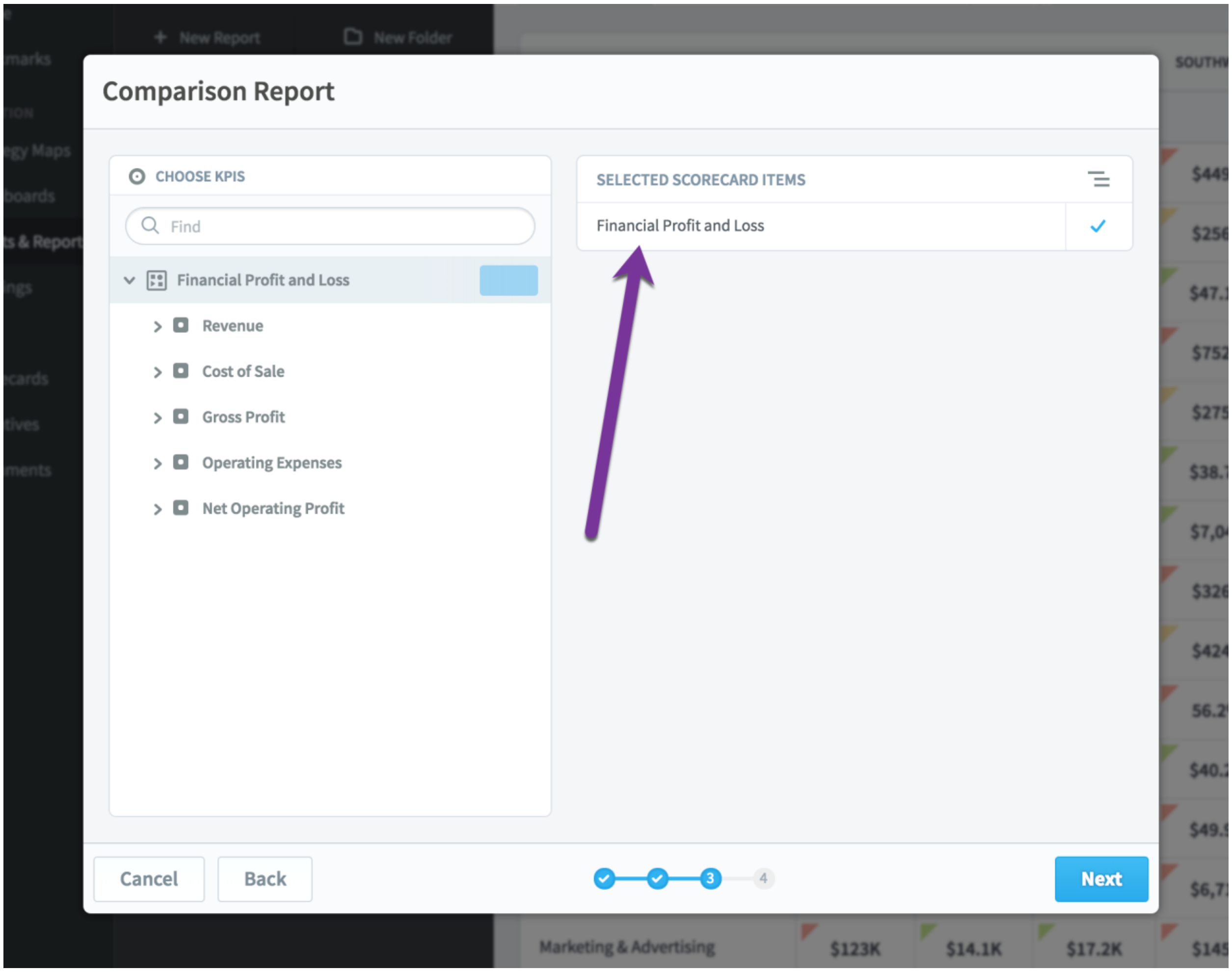
New measure comparison report

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.



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.

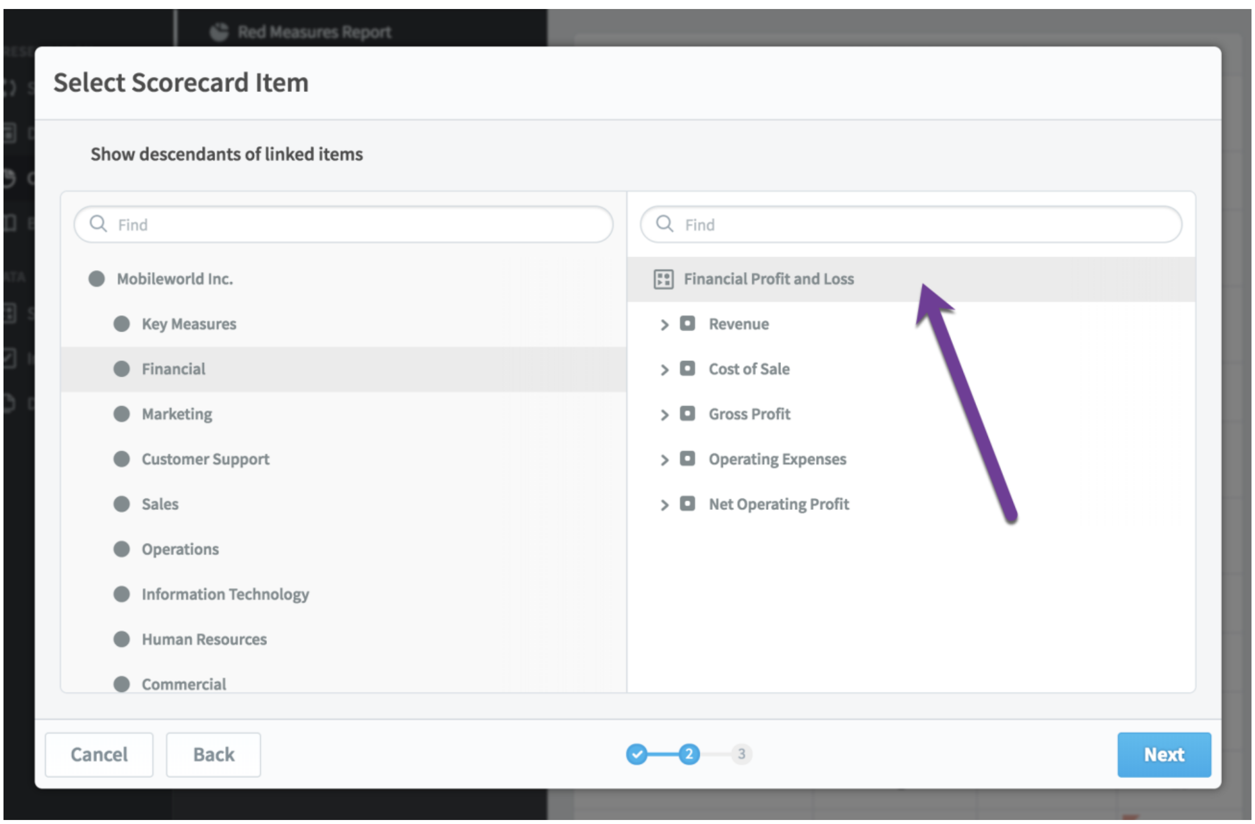


When we're done we see a report with all of the measures for each of the four selected organizations.

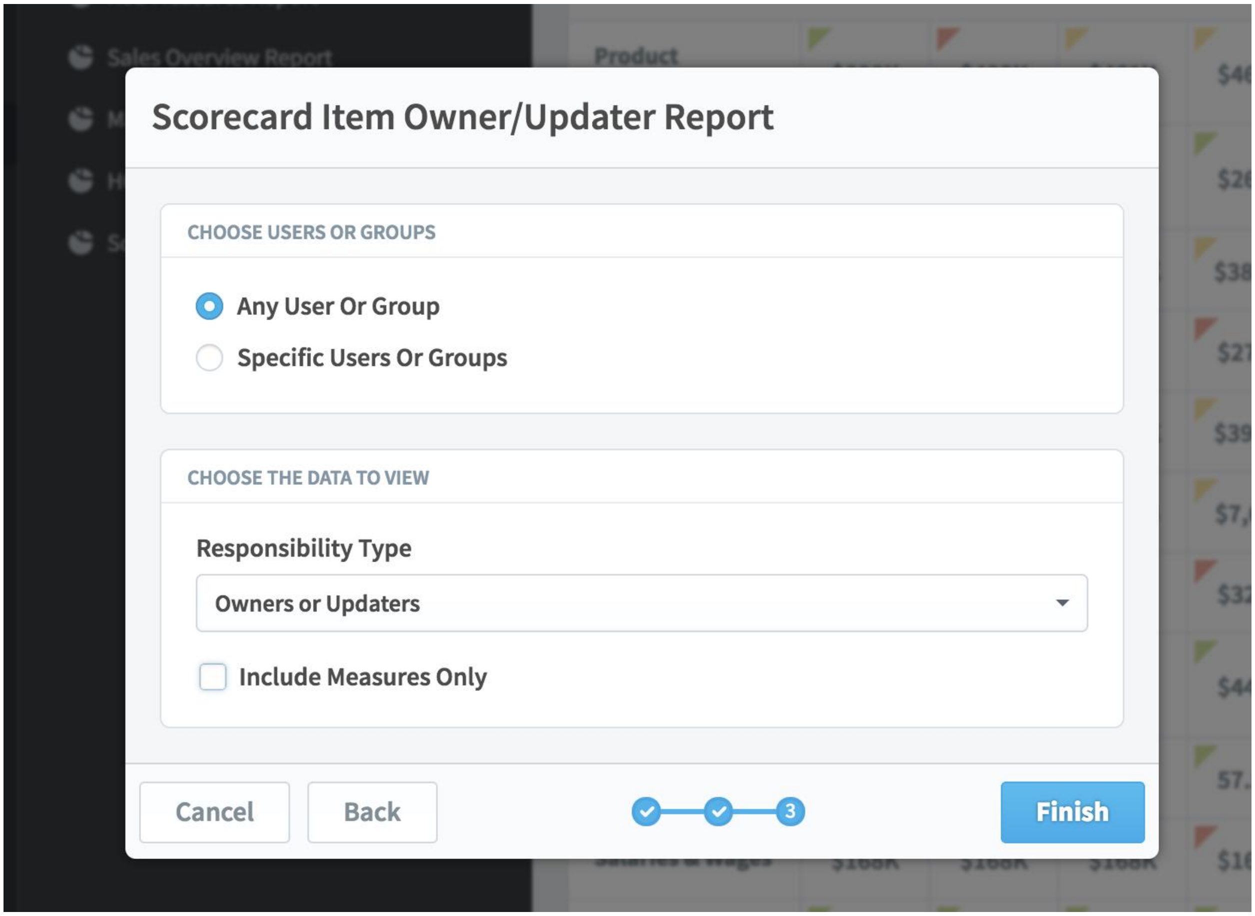
	NORTHEAST	SOUTHEAST	NORTHWEST	SOUTHWEST
FINANCIAL PROFIT AND LOSS				
Product Revenue	$476K	$448K	$444K	$449K
Training Revenue	$248K	$255K	$257K	$256K
Book Revenue	$29.9K	$38.6K	$42.9K	$47.1K
Total Revenue	$754K	$742K	$744K	$752K
Product Costs	$274K	$277K	$274K	$275K

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.



Next you choose what you want the report to show.



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	

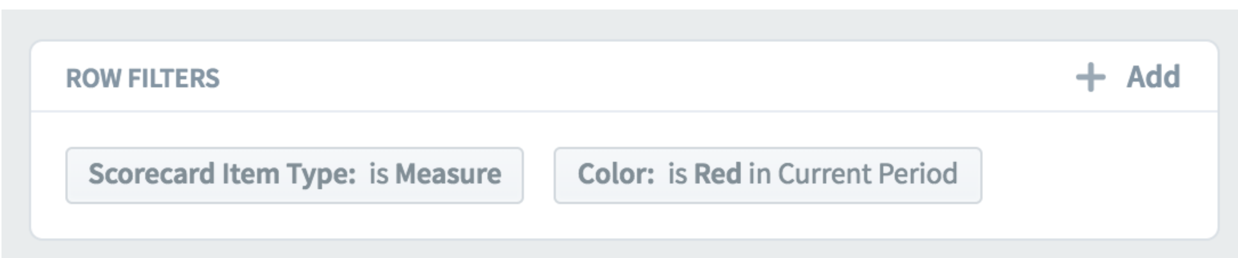
Adding "or" filters to reports

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.

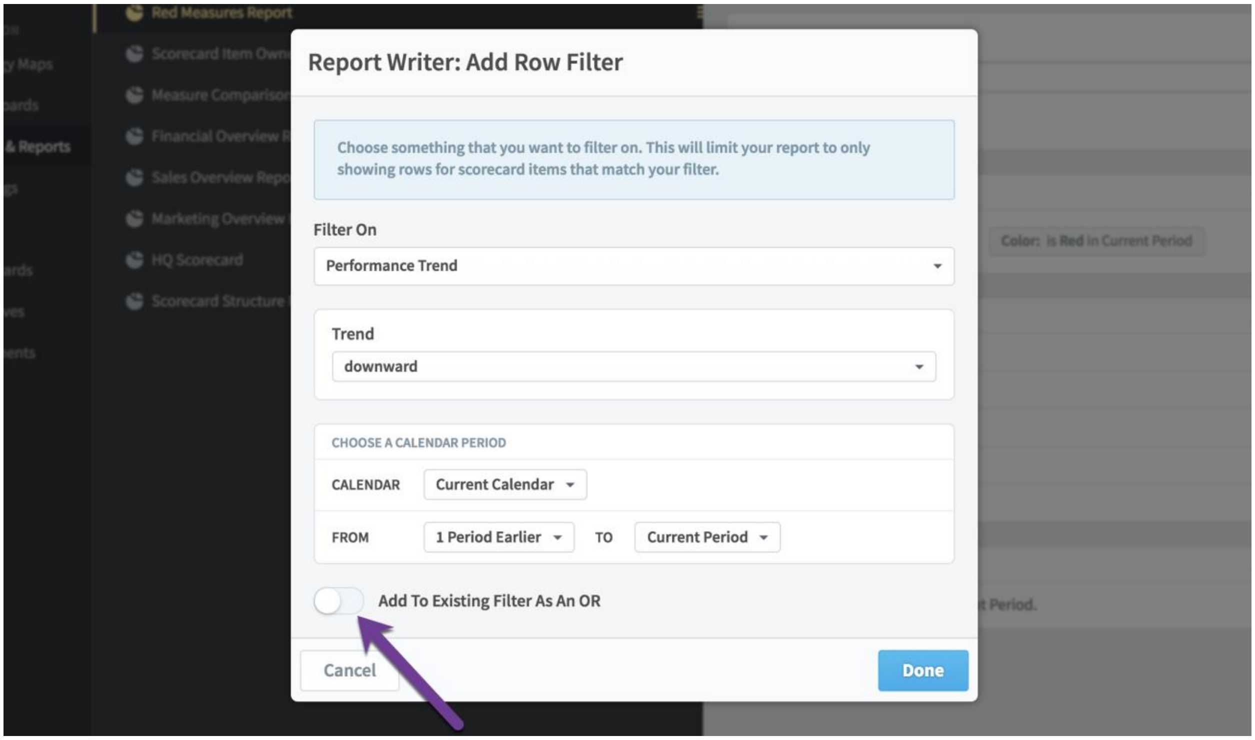
NAME	ORGANIZATION	OWNERS	APRIL 2018
Product Costs	Financial	Joe Abercrombie	$278,157
Total Costs	Financial		$327,258
Pension Contribution (3%)	Financial		$4,969
Marketing & Advertising	Financial	David Baldacci	$99,134
Interest & Bank Charges	Financial		$20,962
Insurance	Financial	Joe Abercrombie	$16,056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

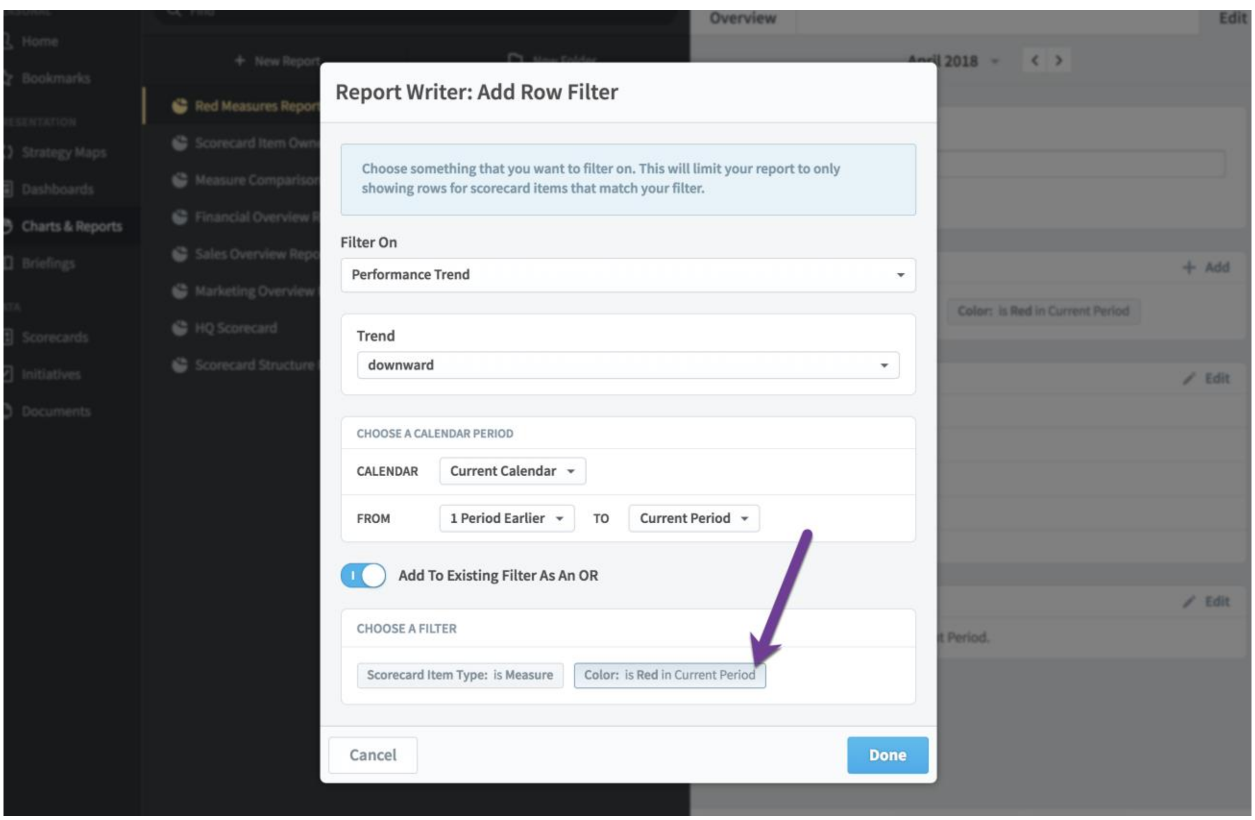


Let's say we want to change this report to show not only red measures, but also measures that are trending downward. That way we'll have a single report showing all of the measures we need to keep an eye on.

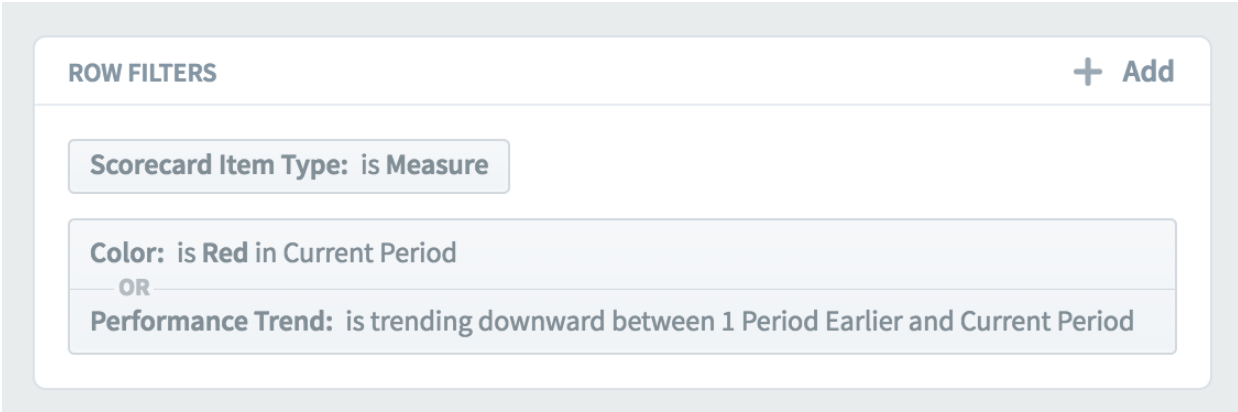
In order to do this, we'll add a new "downward trend" filter, and before we click "done," we'll turn on this "or filter" switch on the bottom.



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."



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).



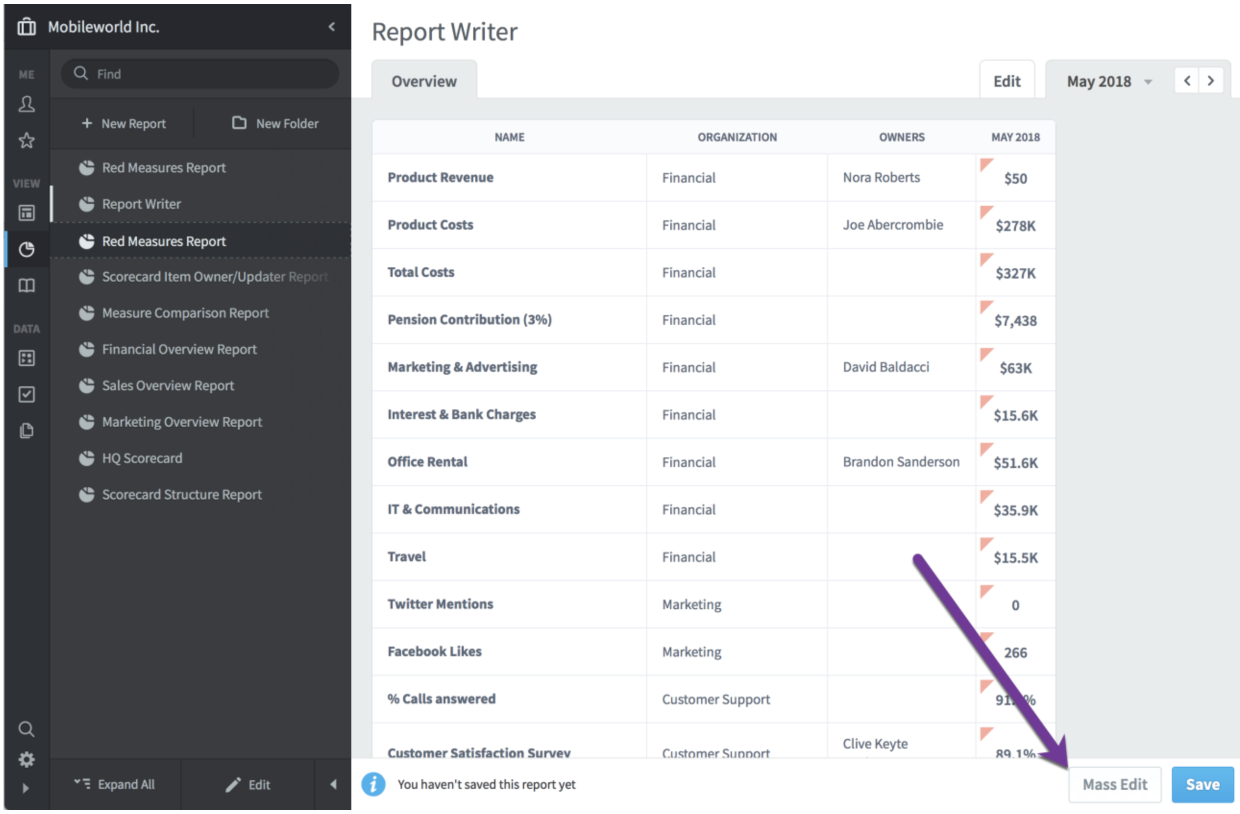
And here's our new report.

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

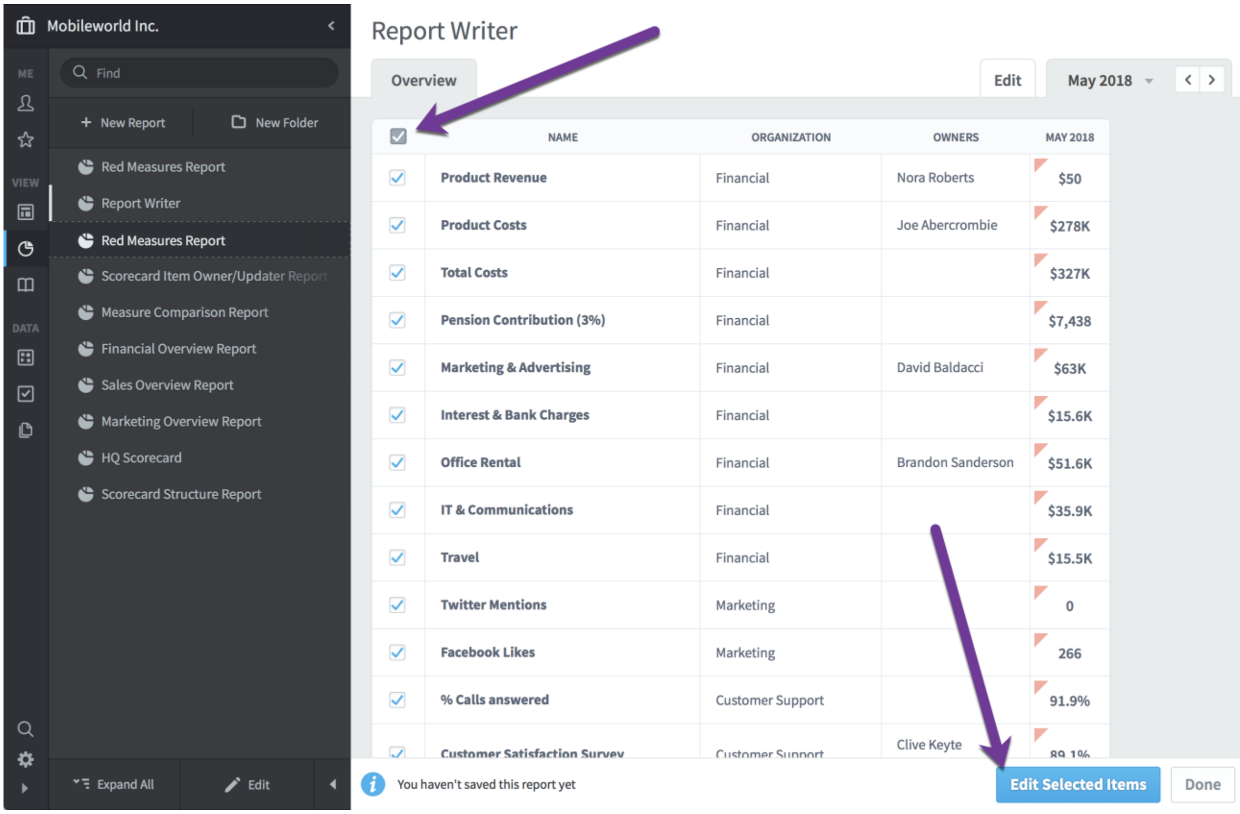
Editing multiple scorecard items at once

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.

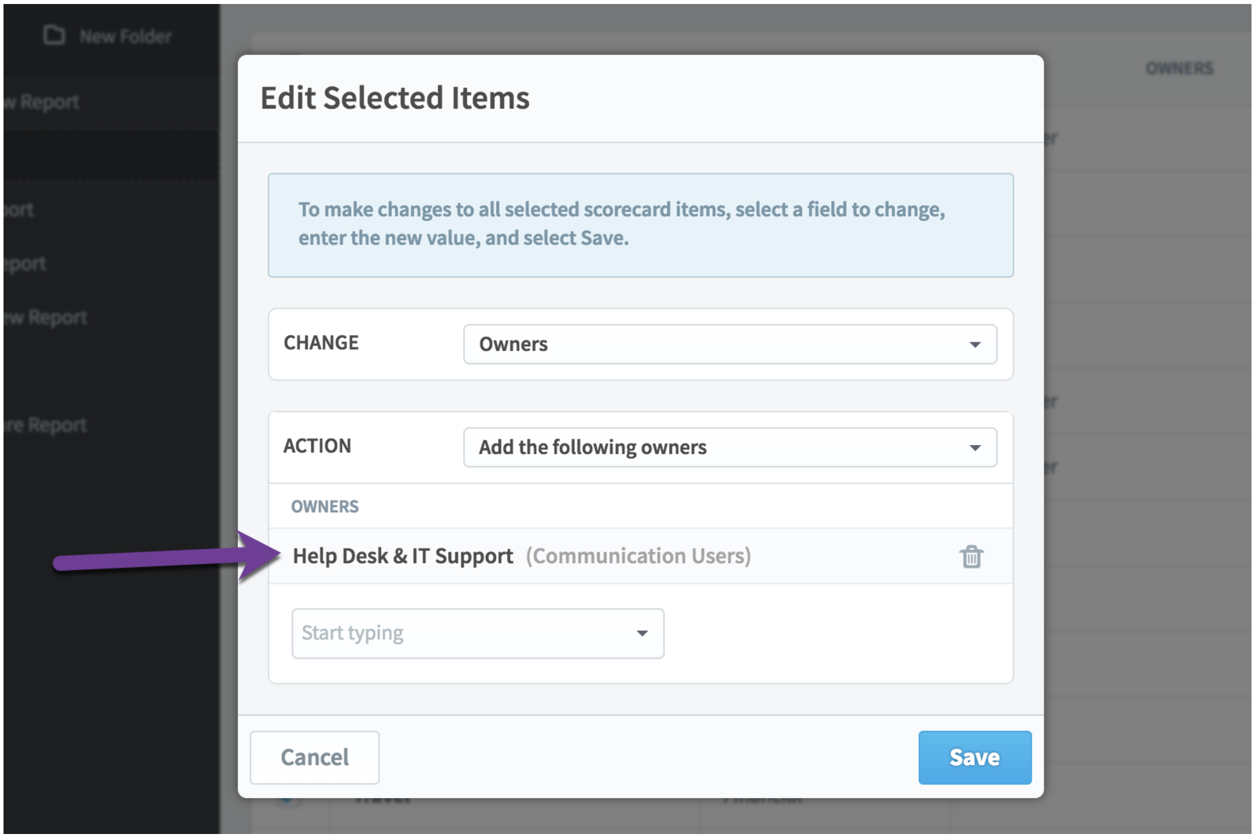
In this example we're going to find all of the red measures and then assign our helpdesk team as their owners. The first step is to create a new report showing all measures that are red for the current period. Before we save the report, we can now see a "Mass Edit" button on the bottom of the screen.



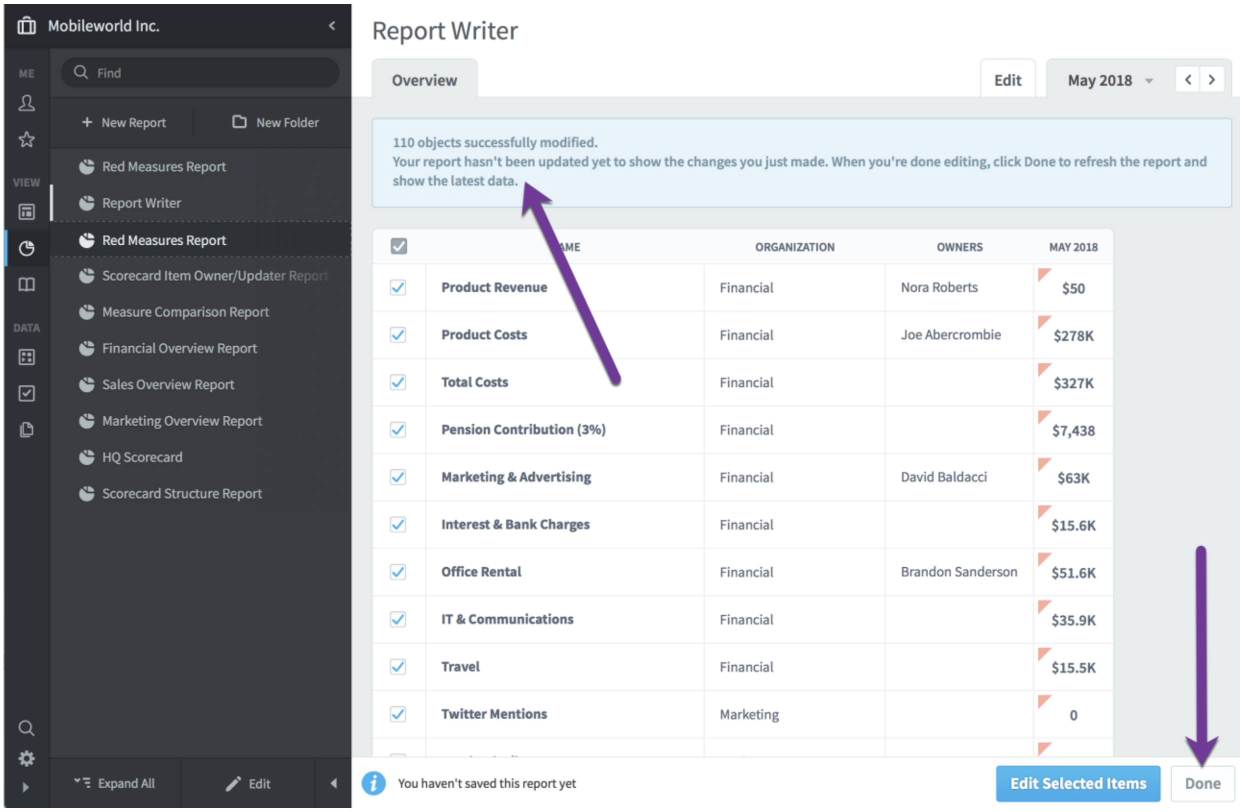
When you click the “Mass Edit” button, a column of checkboxes appears on the left. You can choose individual scorecard items that you want to edit, or you can click the dark checkbox on the top to select all of them. When you’re done, click “Edit Selected Items.”



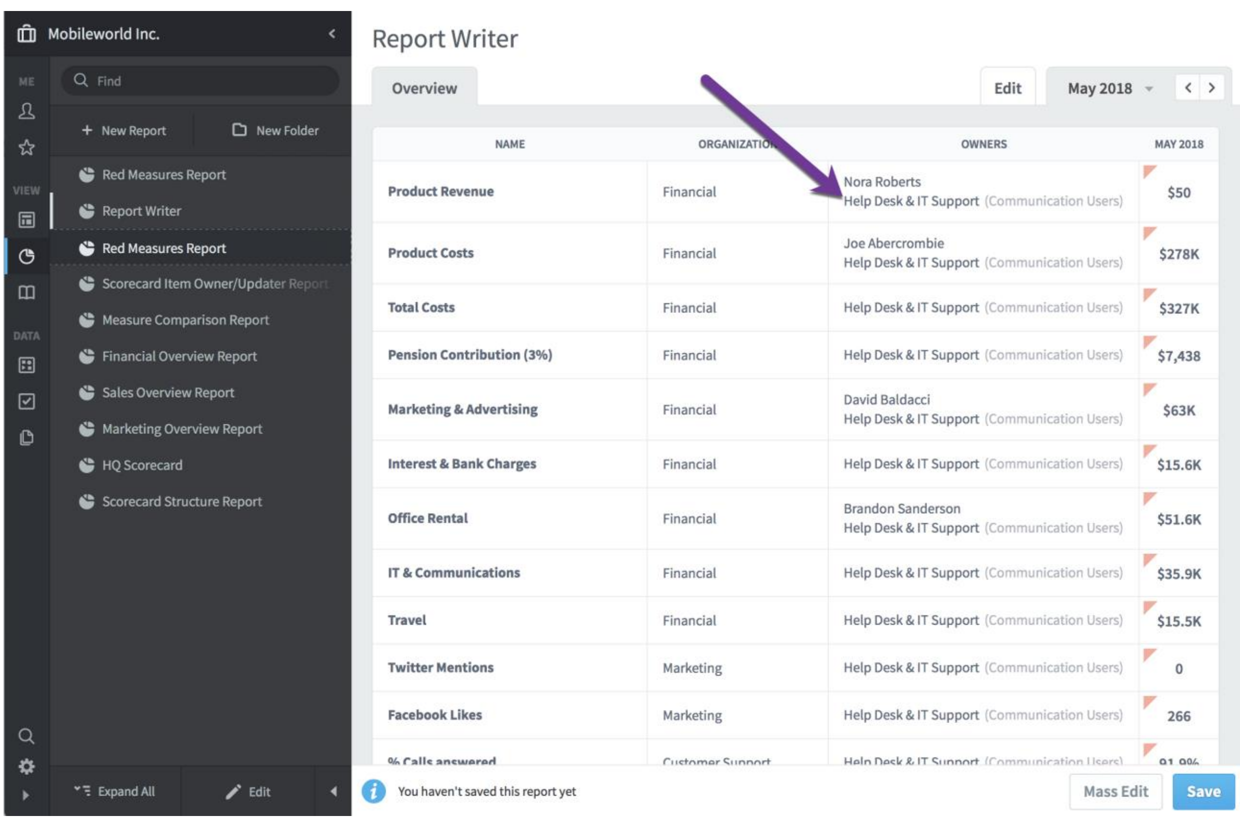
This brings up a dialog where you can choose to edit any property of the selected items. You literally change anything, including name, description, and scoring type. In this example we've decided to add the "Help Desk & IT Support" group as Owners.



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.



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.



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.

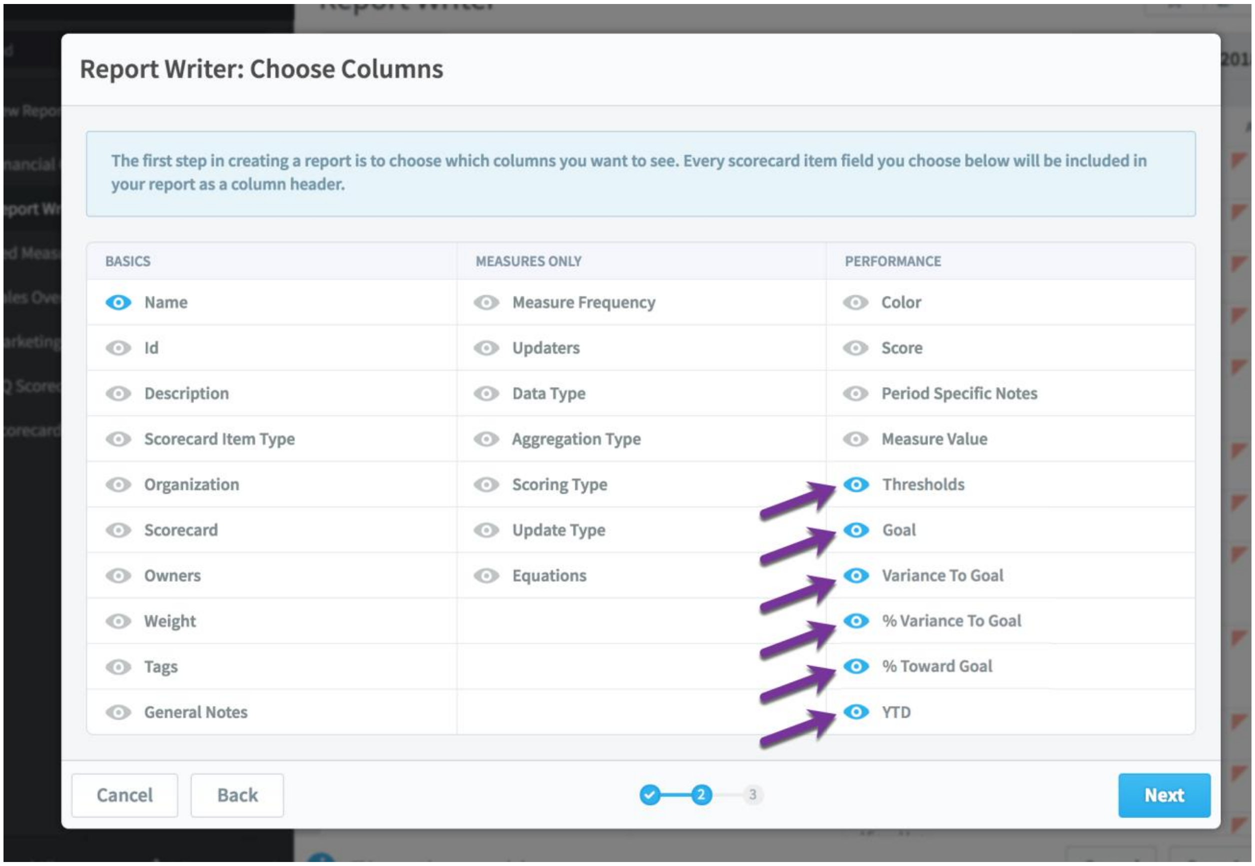
NAME	ORGANIZATION	OWNERS	MAY 2018
Product Revenue	Financial	Nora Roberts	$50
Product Costs	Financial	Joe Abercrombie	$278K
Total Costs	Financial		$327K
Pension Contribution (3%)	Financial		$7,438
Marketing & Advertising	Financial	David Baldacci	$63K
Interest & Bank Charges	Financial		$15.6K

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)

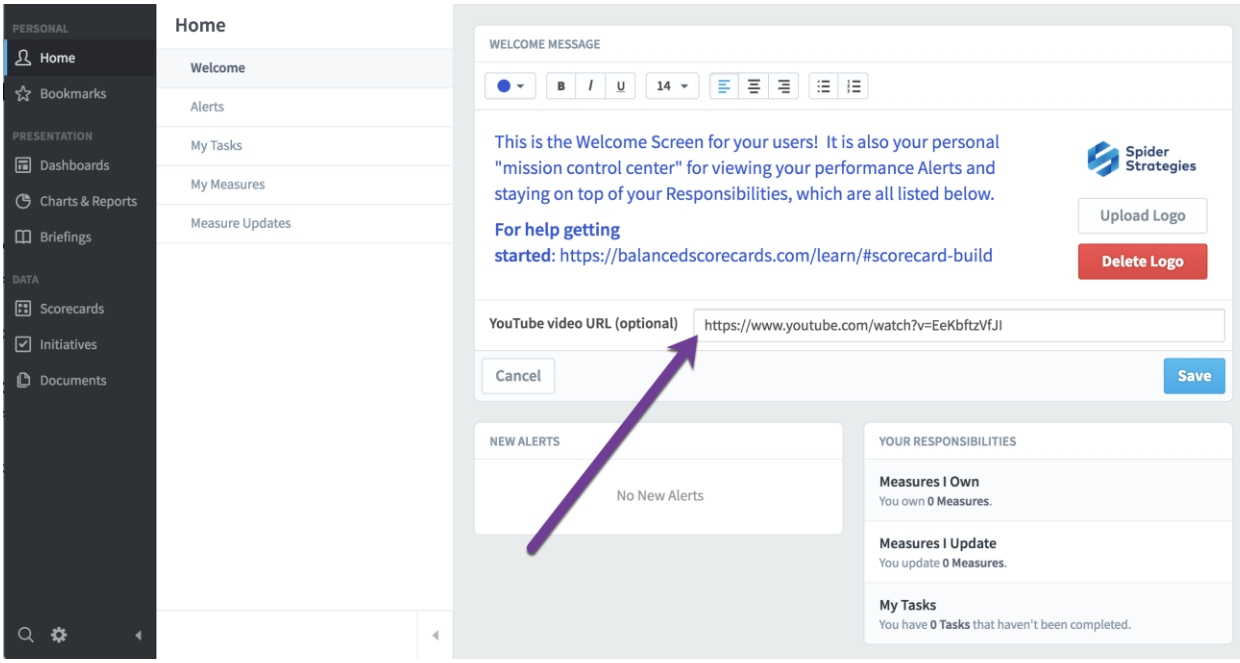


Home

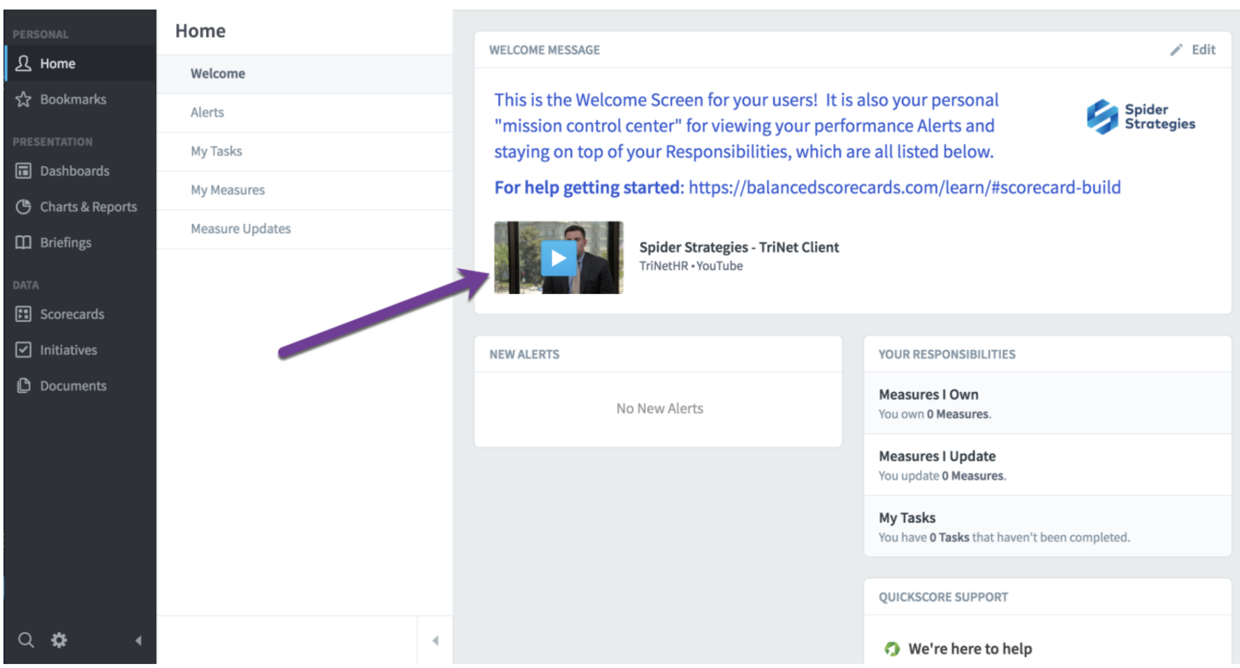
Embedding YouTube video in welcome message

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.

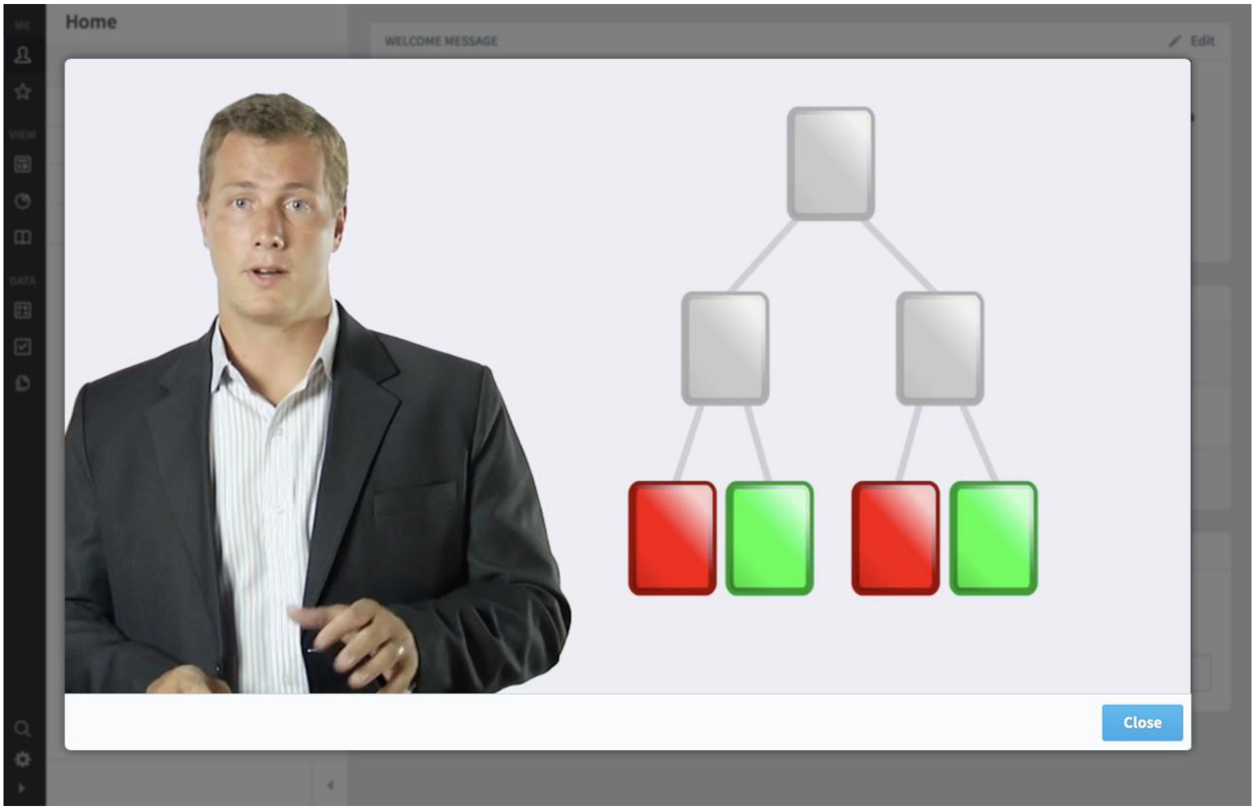
To get started, just click the Edit button in the corner of the welcome message. You can then paste in the video's YouTube URL and click Save.



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

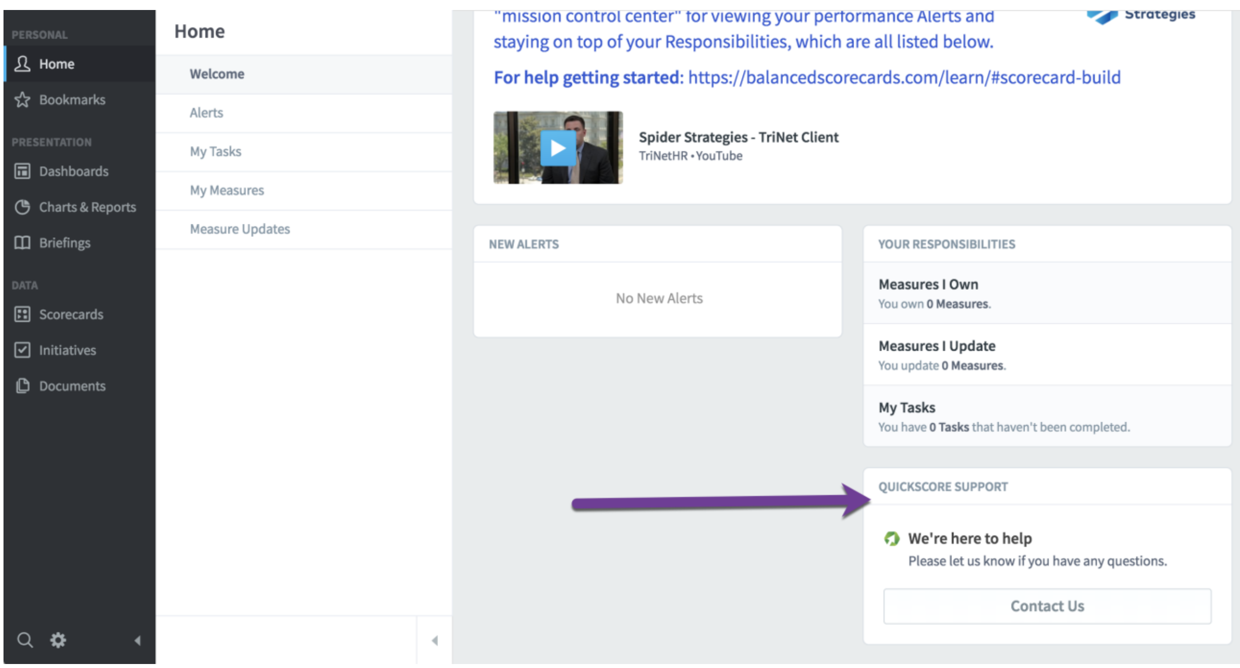


When you click on the video, it will play in a dialog.

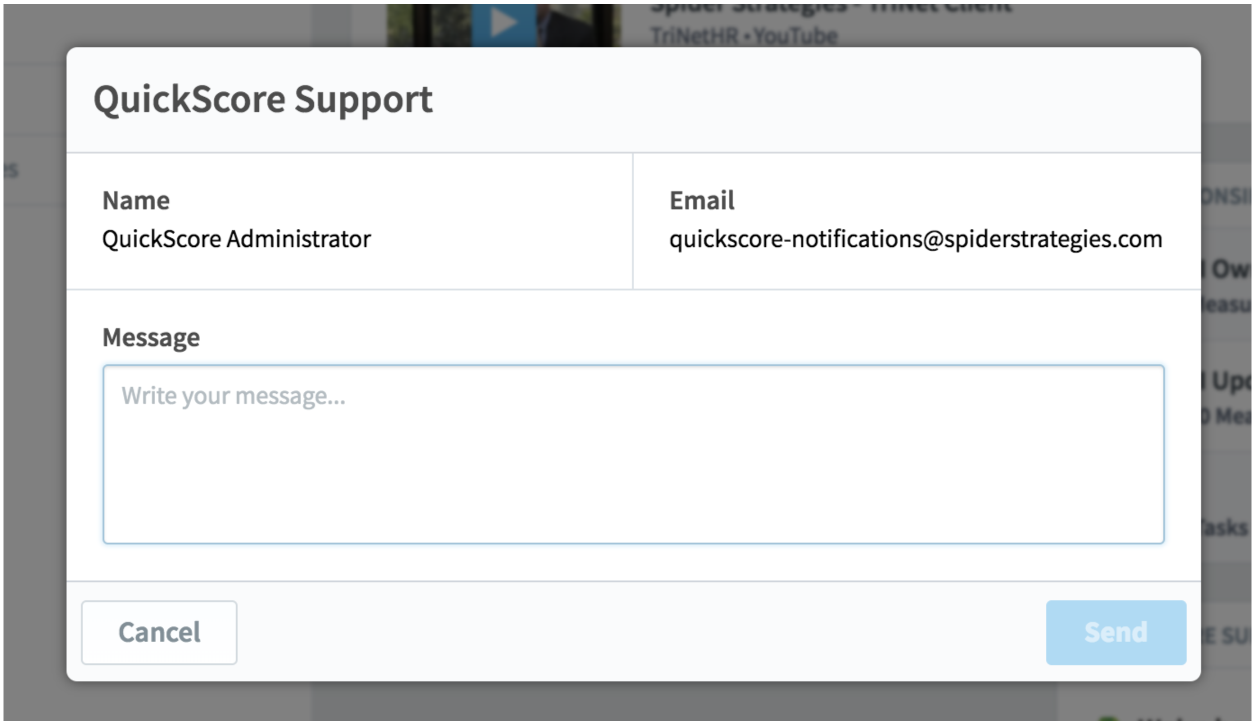


Support link on the Welcome page

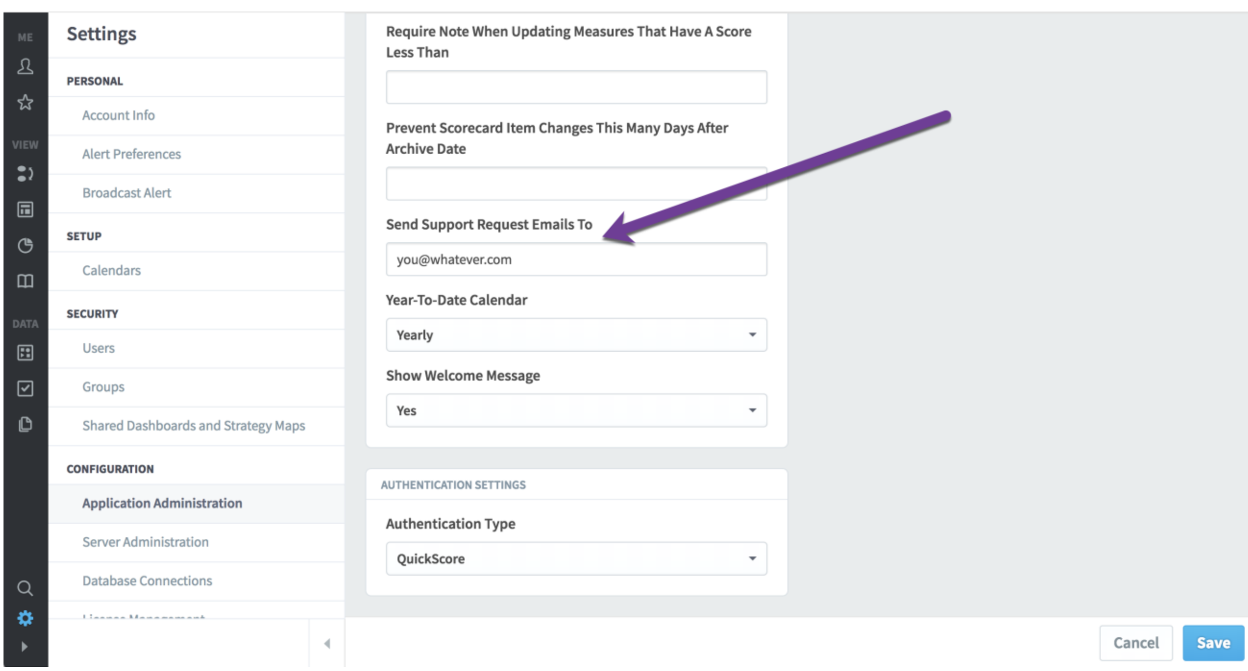
There's now a support link on the Welcome page.



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.



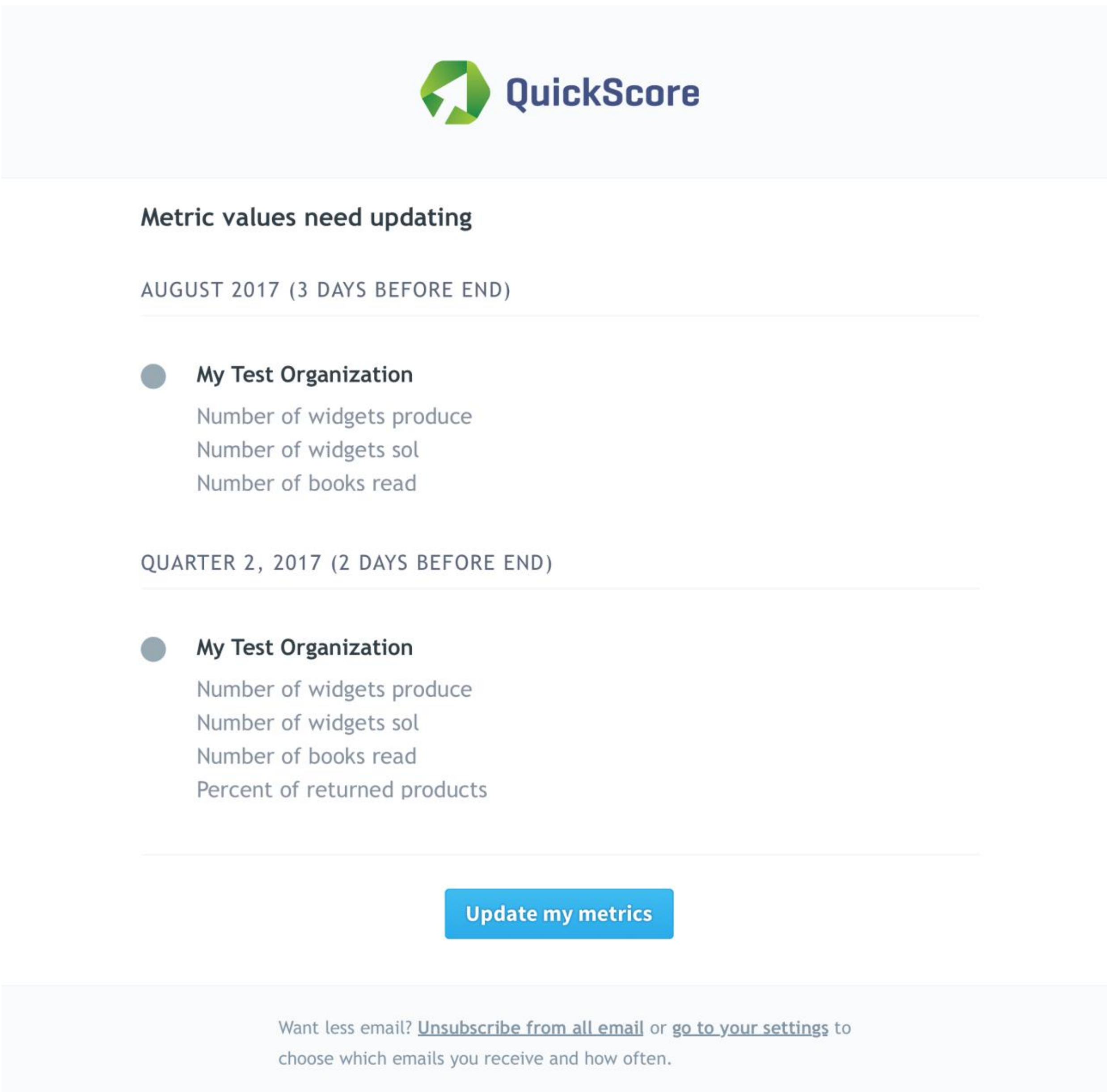
You can configure who receives the support email in the Application Administration section. If you leave the email blank, it won't show the support section at all on the Welcome page.



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.


QuickScore

Metric values need updating

AUGUST 2017 (3 DAYS BEFORE END)

My Test Organization

Number of widgets produce
Number of widgets sol
Number of books read

QUARTER 2, 2017 (2 DAYS BEFORE END)

My Test Organization

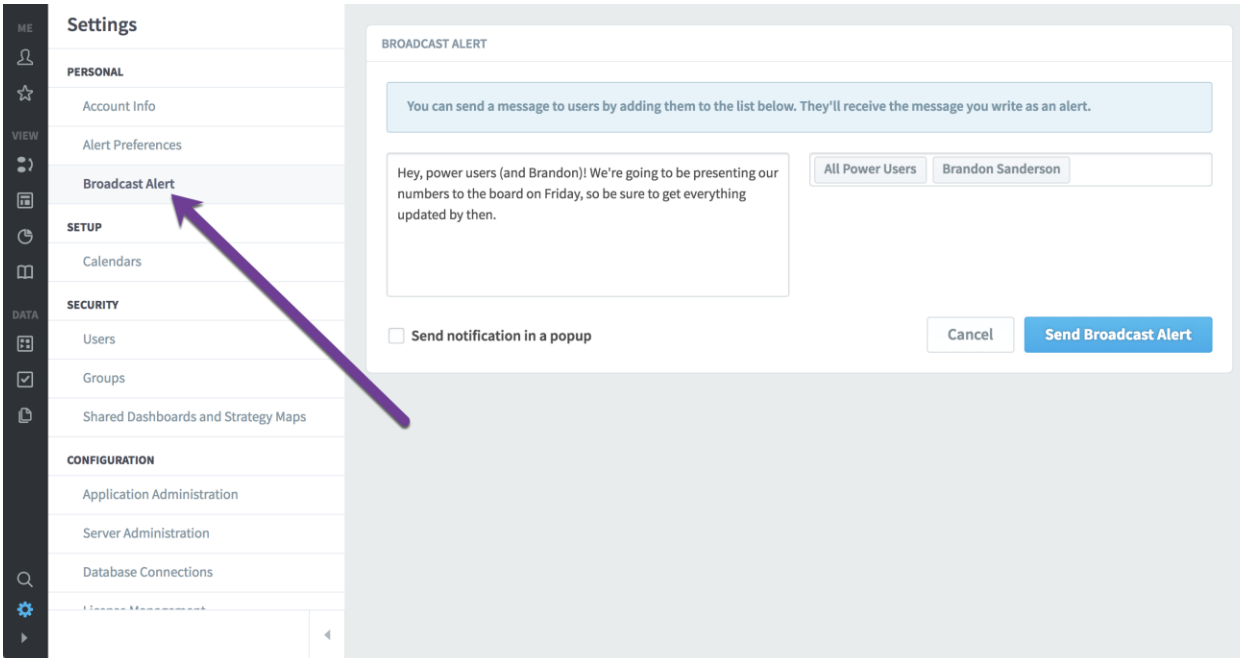
Number of widgets produce
Number of widgets sol
Number of books read
Percent of returned products

Update my metrics

Want less email? Unsubscribe from all email or go to your settings to choose which emails you receive and how often.

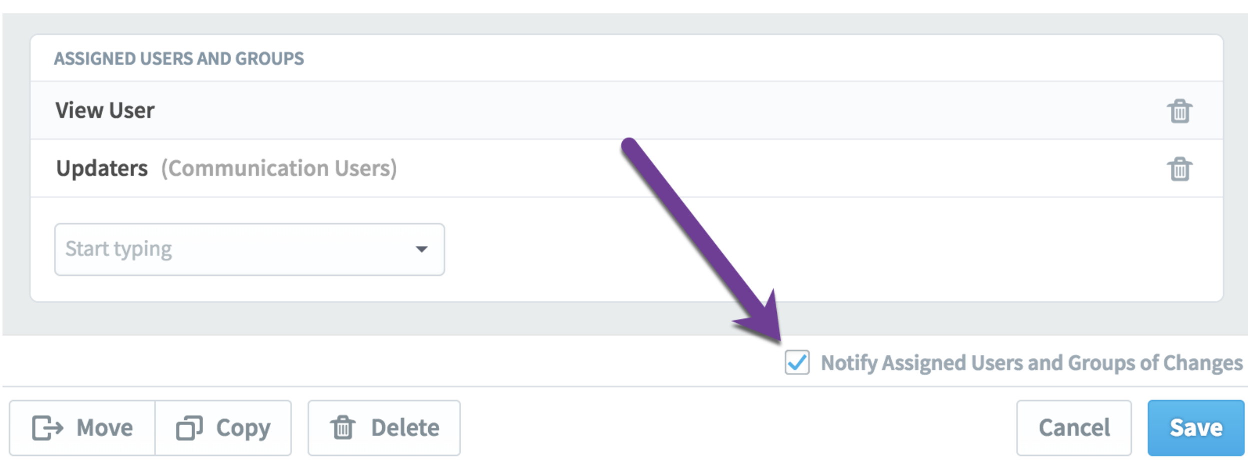
Sending broadcast alerts

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.



Alerting initiative owners of changes

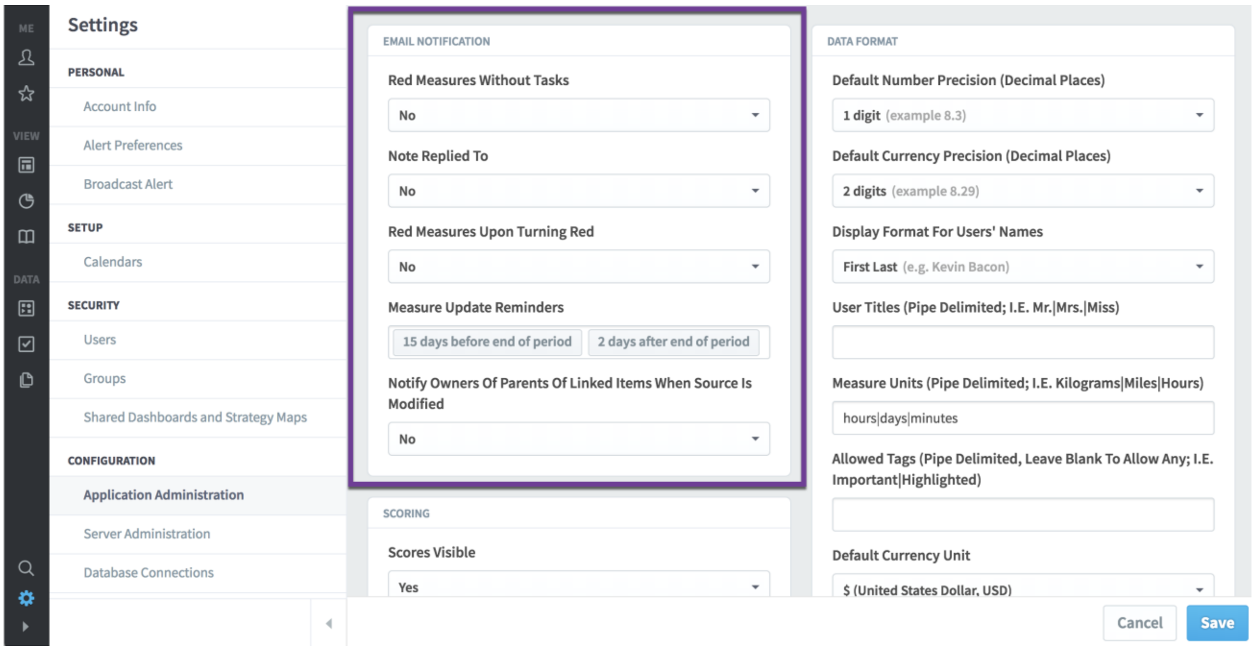
When you edit an initiative, there is now a checkbox to alert assigned users and groups of the changes.



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.



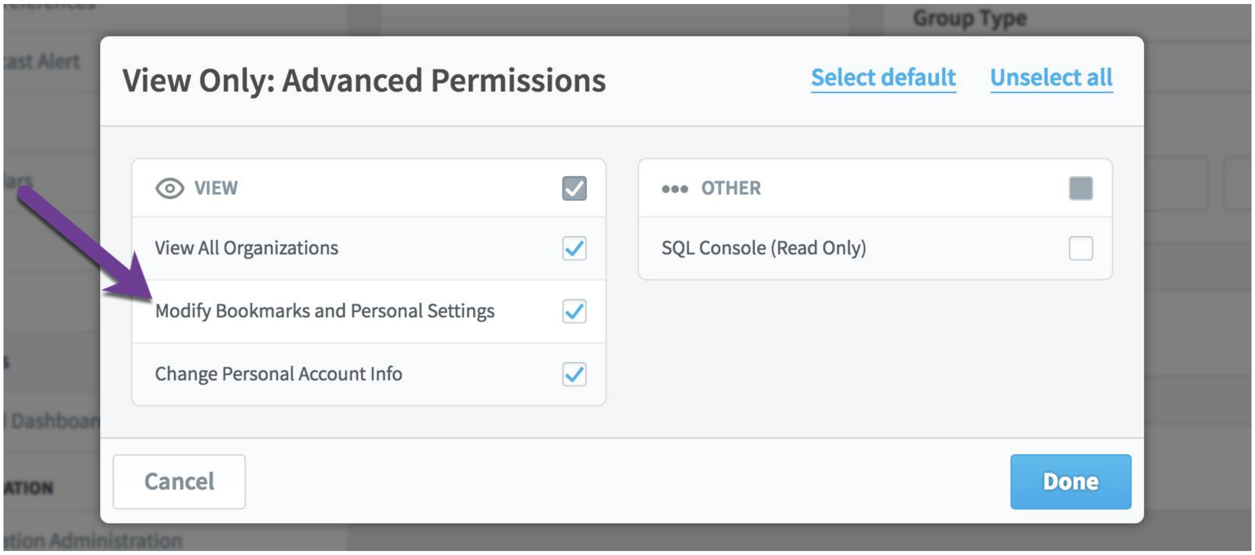
"Red measures without tasks" will send an alert to any measure owner when that measure turns red and there's not an initiative item in place to correct the measure performance. Similarly, "Red measures upon turning red" will send an alert to the measure owner when any measure turns red.

"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

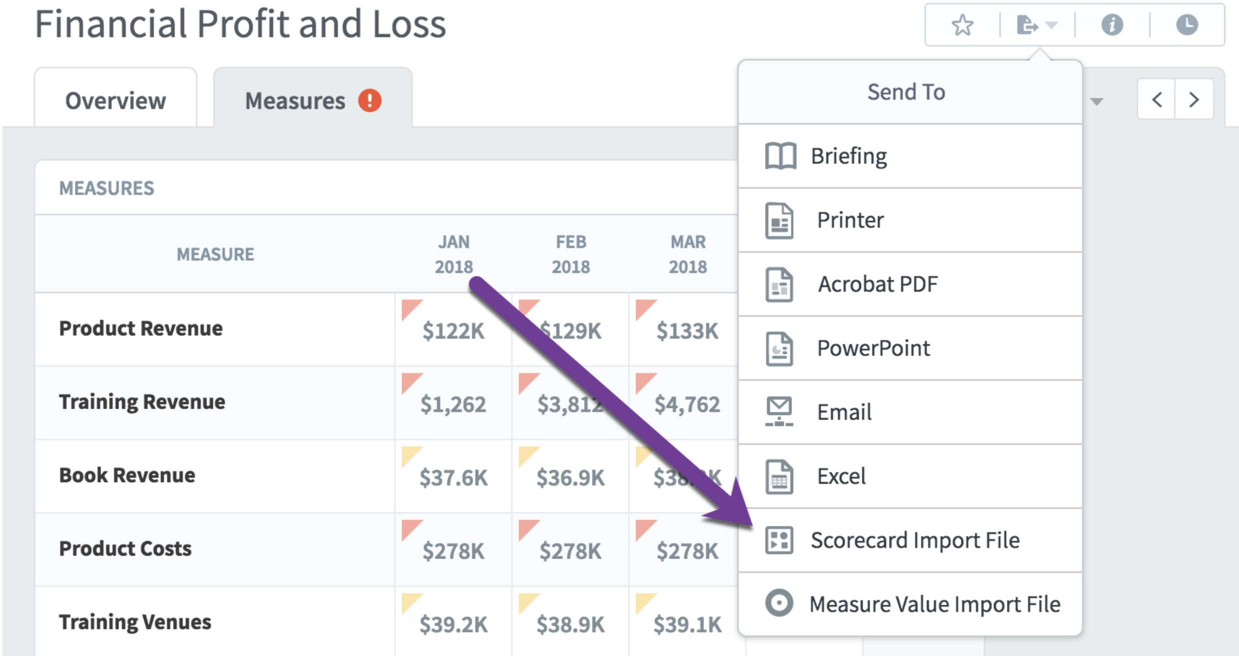
The “Modify Bookmarks and Personal Settings” permission for View Only groups now allows users in those groups to create alerts.



Exports

Exporting scorecard structure and values

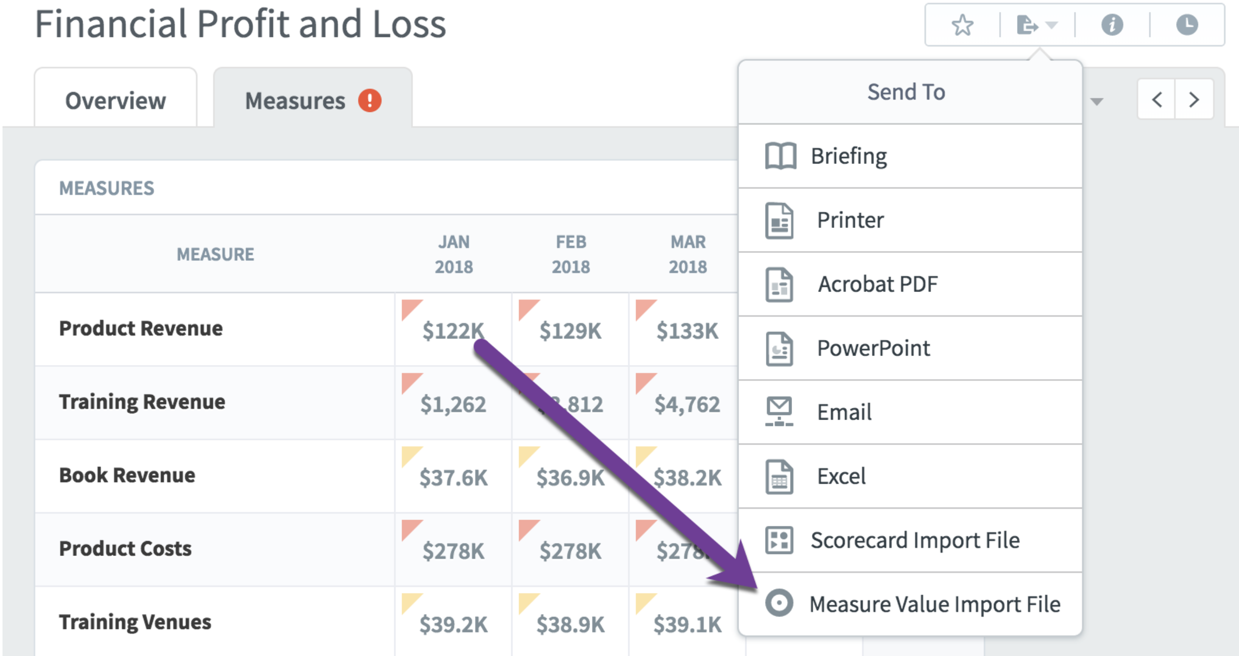
There are two new options in the “send to” menu on the Scorecards Measures tab, both of which create exports in a format that can be used to reimport them later. The first option we’ll look at is “Scorecard Import File.”



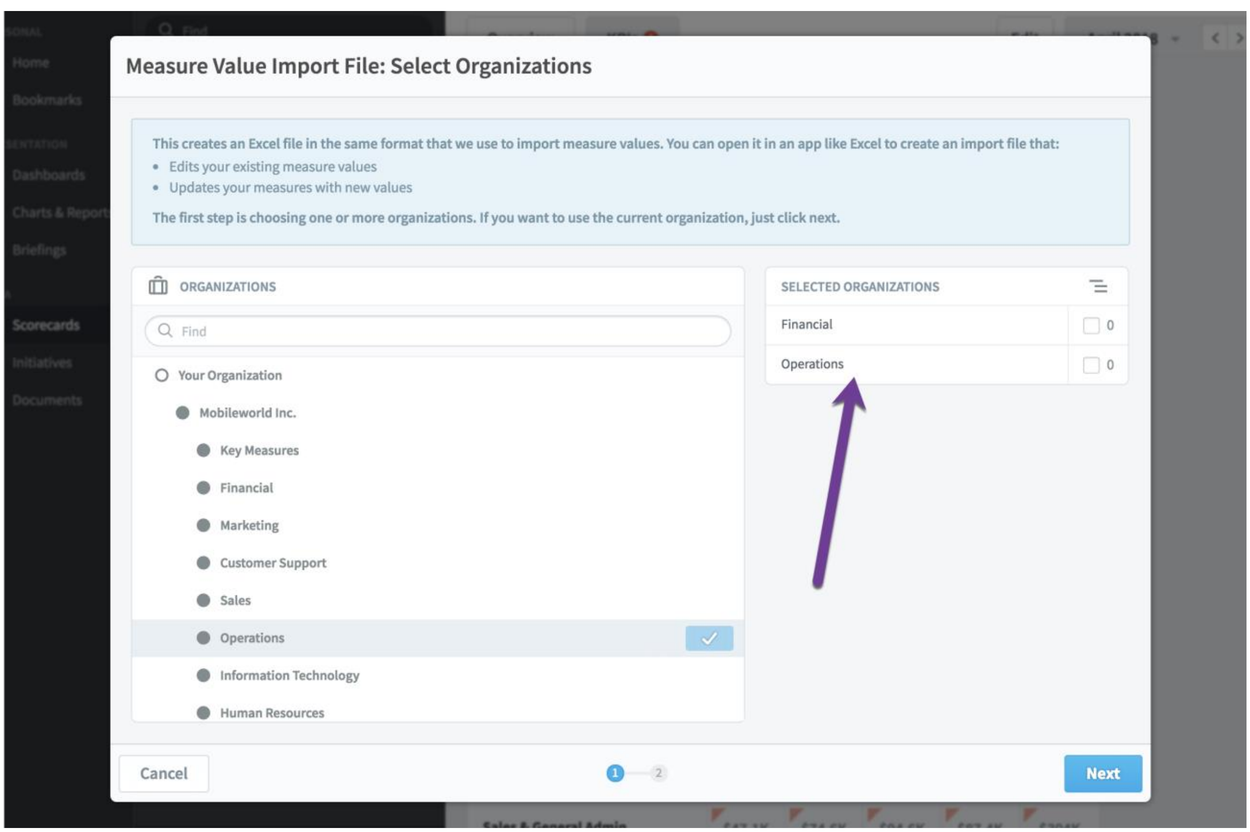
This exports a spreadsheet of your entire scorecard that is in the format required for Connect structure imports.

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



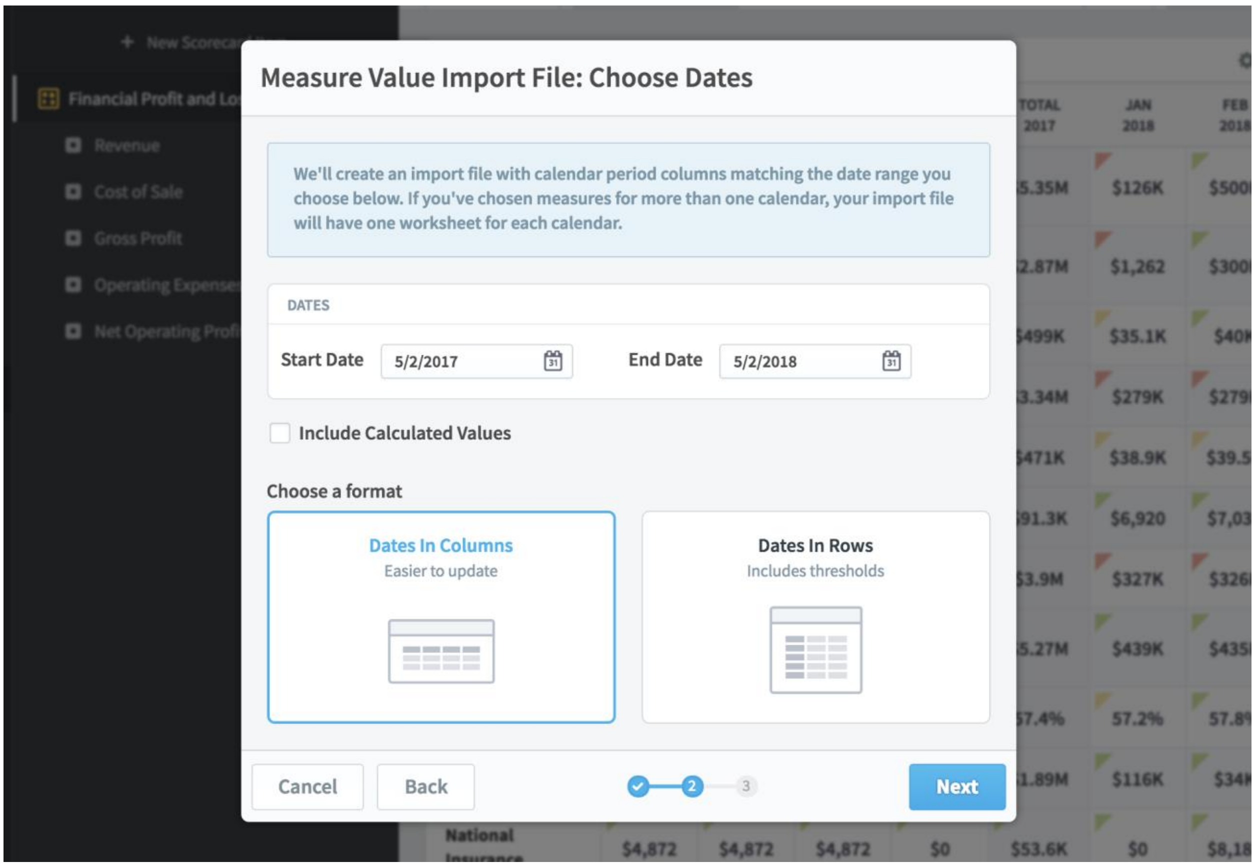
When you click on the "Measure Value Import File" option in the menu, it opens a dialog. The first step is choosing which organizations you want to include in your file. It adds the current organization by default, so if that's all you want, just click next.



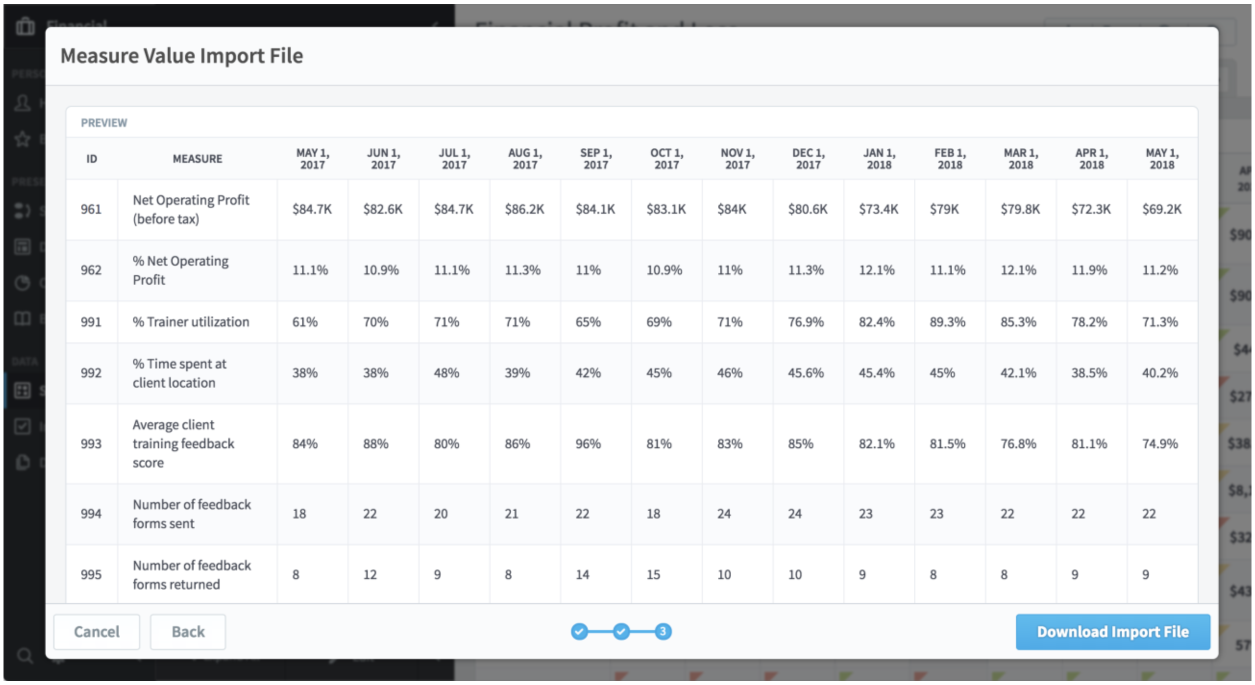
The next step has more options about what to include in the import file you're creating. You'll need to choose a start and end date, and you can choose whether to include calculated values or not. Most importantly, you'll want to choose which format you want your data to be in.

"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."

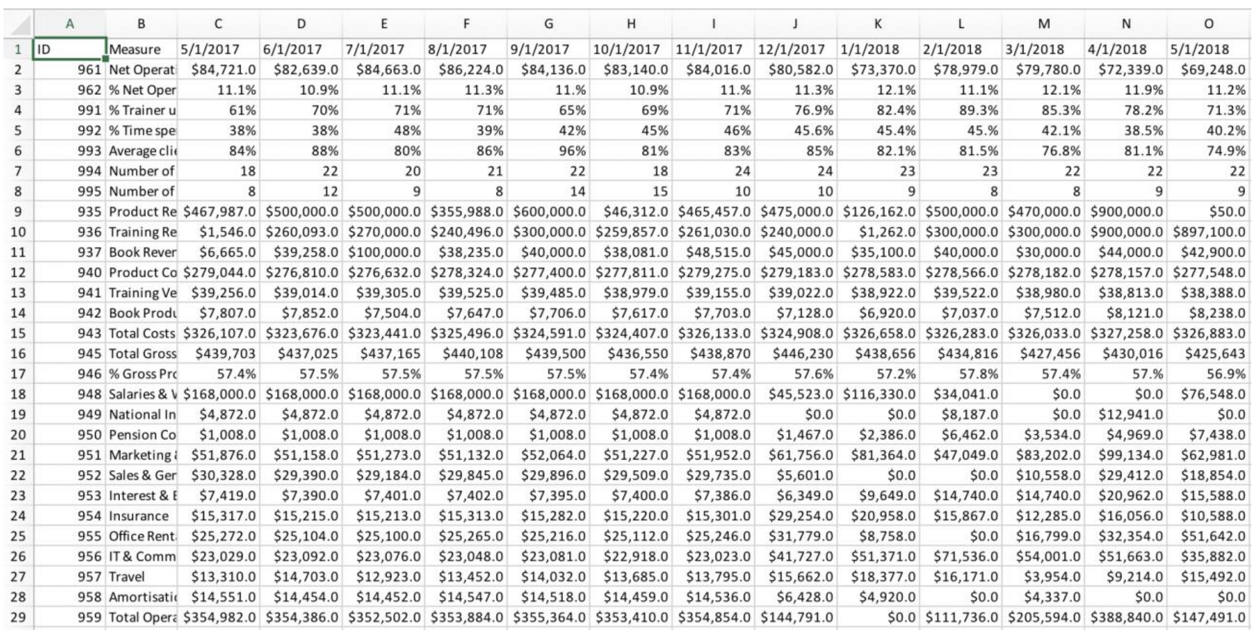


The final step is a preview of your file before you download it. This is to make sure you've set things up properly.



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

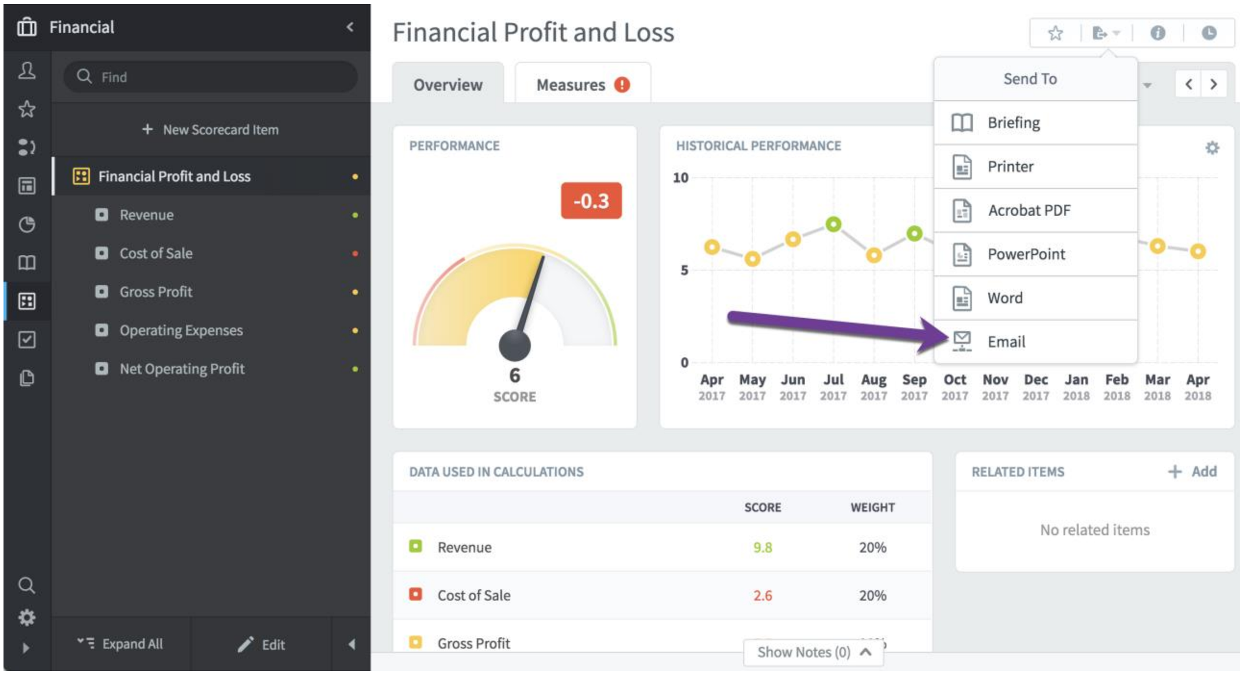
When you click the “Download Import File” button, it will save a spreadsheet that matches the preview. If you choose “Data in Columns” and have measures that use different calendars, your spreadsheet will have one worksheet for every calendar.



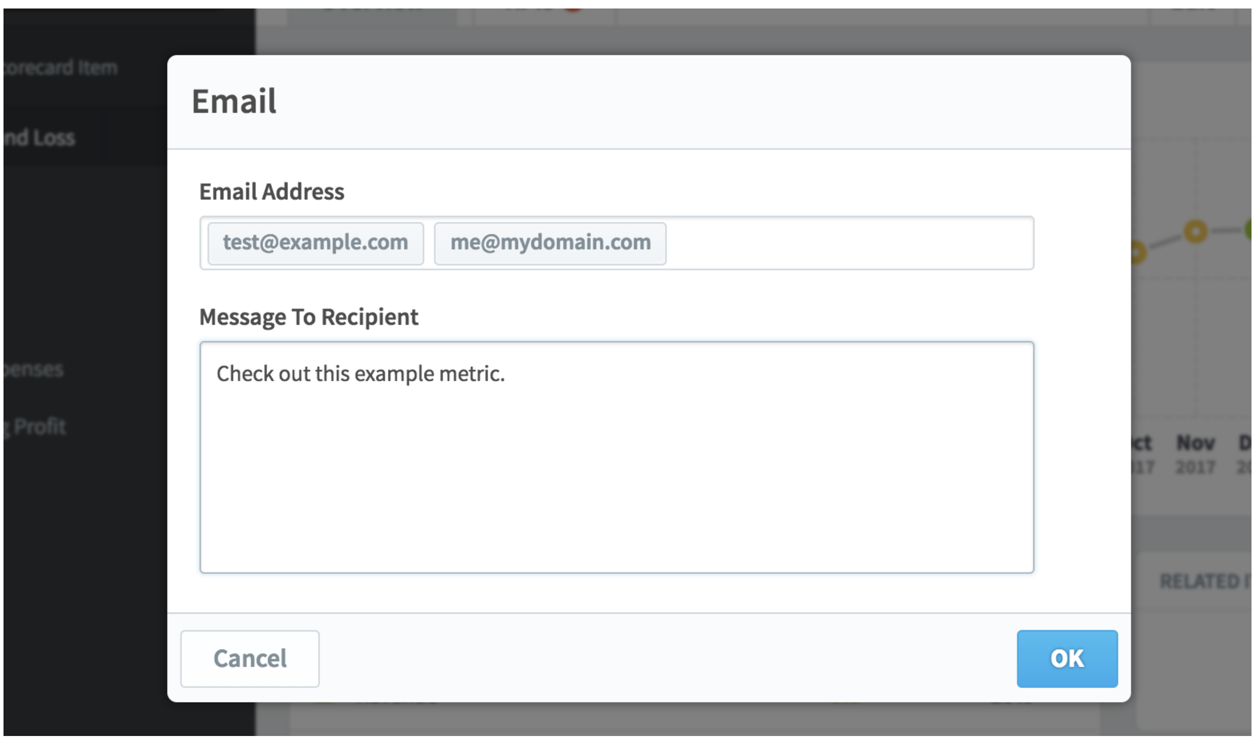
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	ID	Measure	5/1/2017	6/1/2017	7/1/2017	8/1/2017	9/1/2017	10/1/2017	11/1/2017	12/1/2017	1/1/2018	2/1/2018	3/1/2018	4/1/2018	5/1/2018
2	961	Net Operat	$84,721.0	$82,639.0	$84,663.0	$86,224.0	$84,136.0	$83,140.0	$84,016.0	$80,582.0	$73,370.0	$78,979.0	$79,780.0	$72,339.0	$69,248.0
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 cli	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	Amortisatic	$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

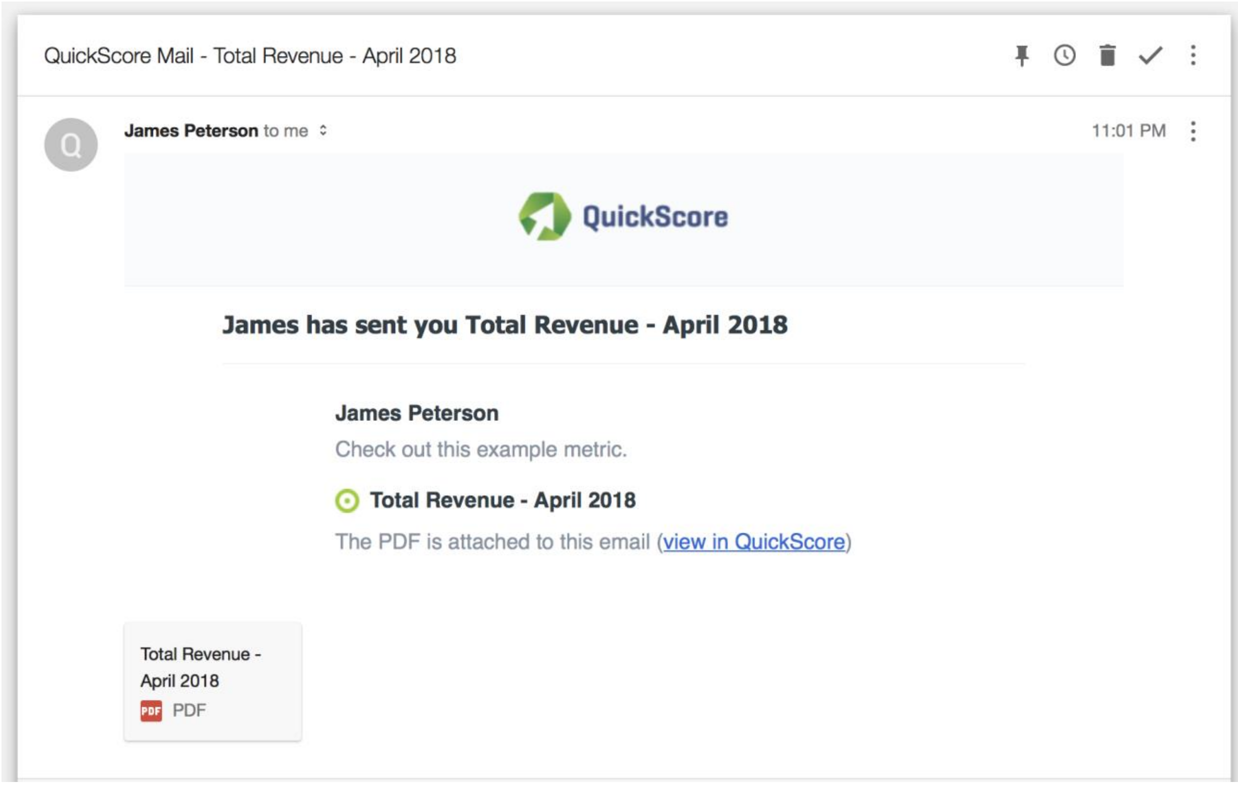
Many pages now have an “Email” option in their “Send To…” menus.



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

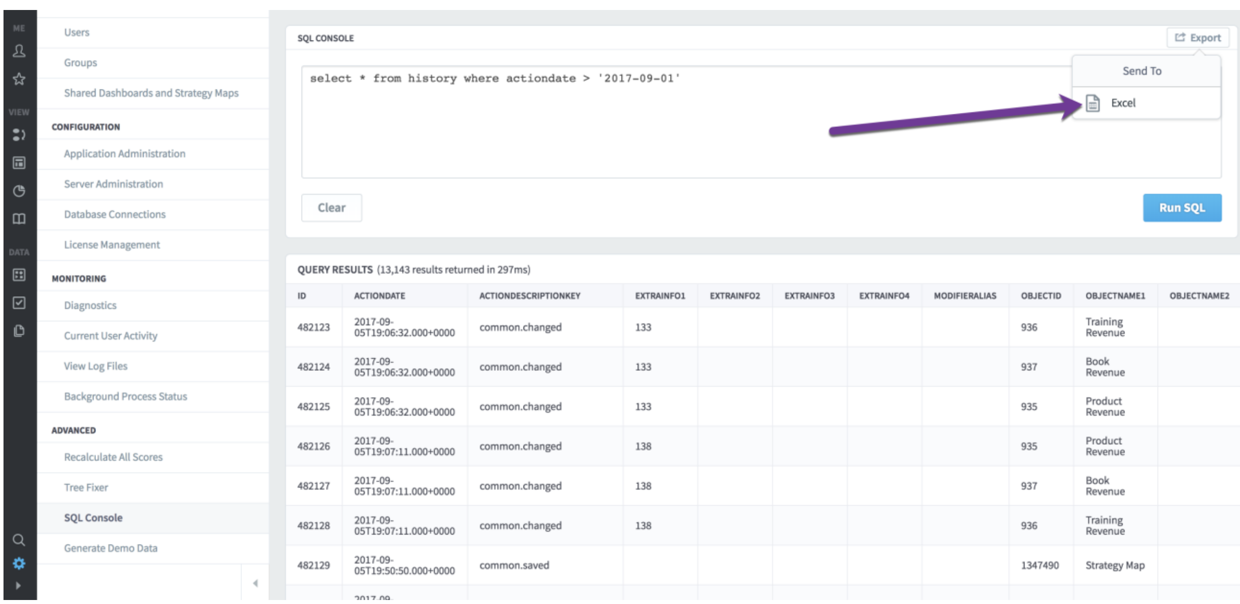


QuickScore will send emails that contain a PDF export of the page, as well as a link that will take them directly to the page once they log in.

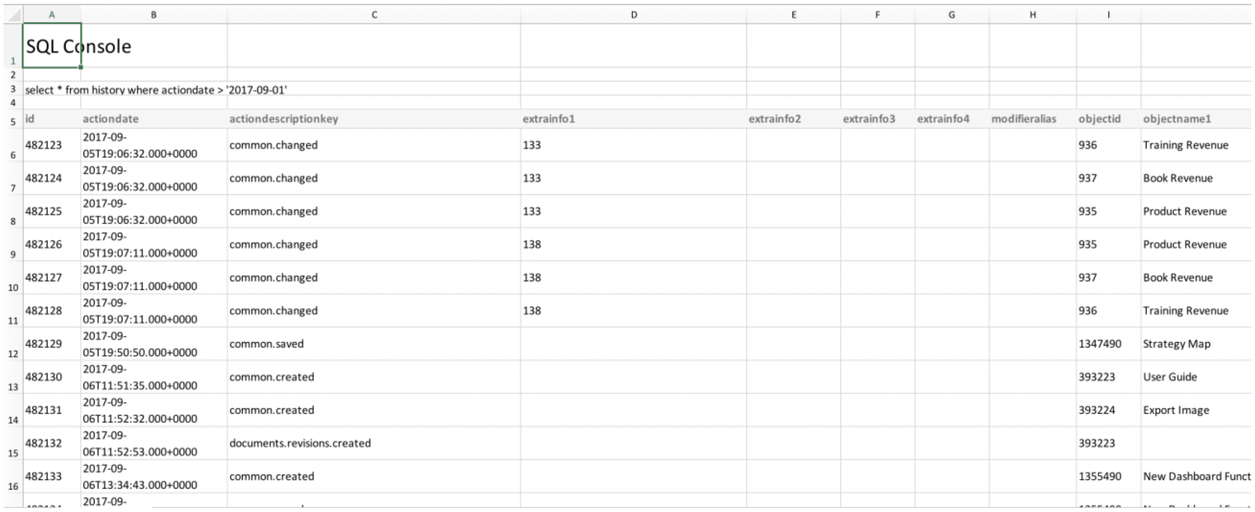


Exporting SQL console results to Excel

There’s now a “Send to Excel” option in the SQL console.



This produces a nicely formatted Excel export of your results.



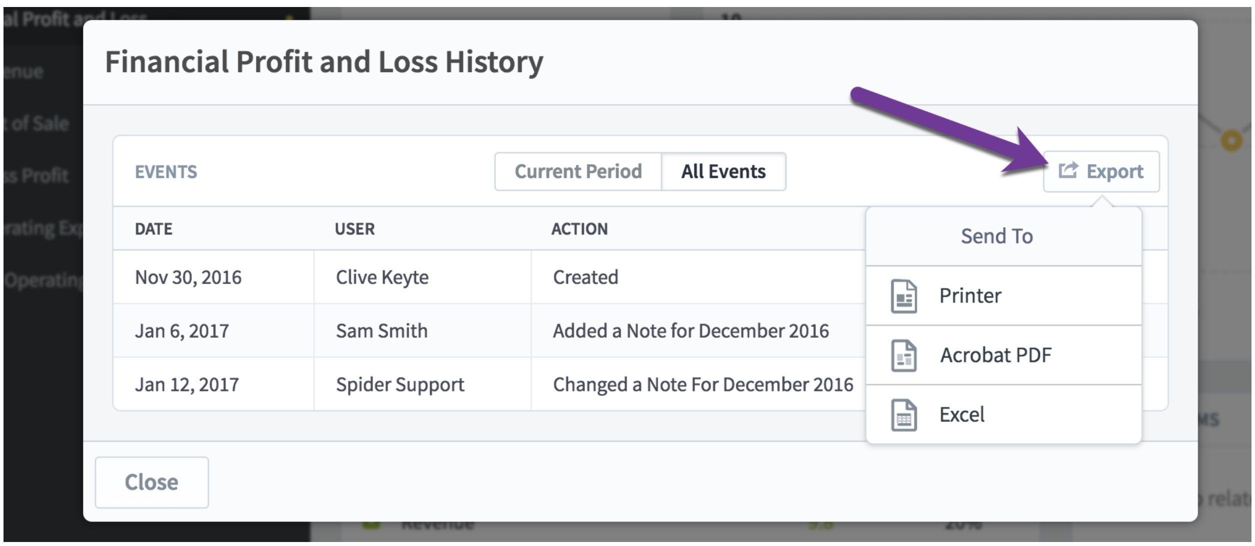
SQL Console

select * from history where actiondate > '2017-09-01'

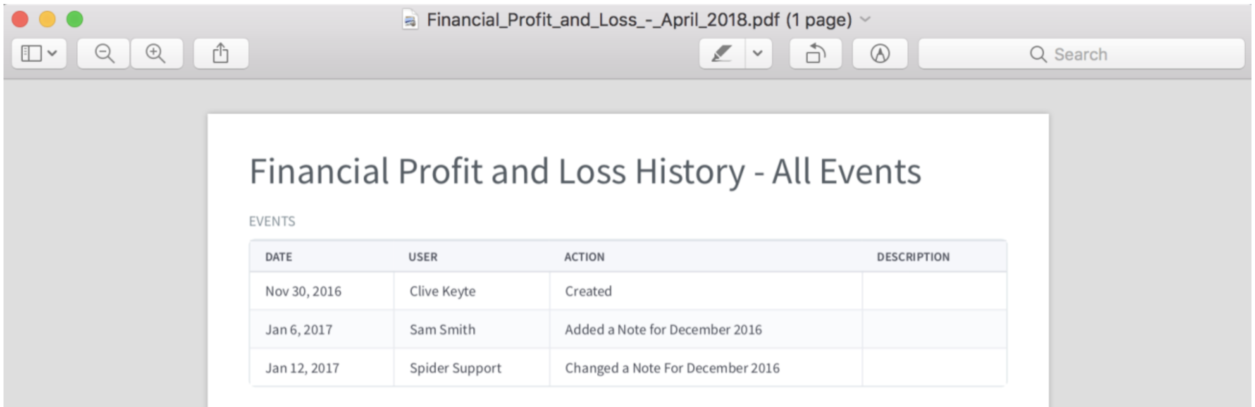
id	actiondate	actiondescriptionkey	extrainfo1	extrainfo2	extrainfo3	extrainfo4	modifieralias	objectid	objectname1
482123	2017-09-05T19:06:32.000+0000	common.changed	133					936	Training Revenue
482124	2017-09-05T19:06:32.000+0000	common.changed	133					937	Book Revenue
482125	2017-09-05T19:06:32.000+0000	common.changed	133					935	Product Revenue
482126	2017-09-05T19:07:11.000+0000	common.changed	138					935	Product Revenue
482127	2017-09-05T19:07:11.000+0000	common.changed	138					937	Book Revenue
482128	2017-09-05T19:07:11.000+0000	common.changed	138					936	Training Revenue
482129	2017-09-05T19:50:50.000+0000	common.saved						1347490	Strategy Map
482130	2017-09-06T11:51:35.000+0000	common.created						393223	User Guide
482131	2017-09-06T11:52:32.000+0000	common.created						393224	Export Image
482132	2017-09-06T11:52:53.000+0000	documents.revisions.created						393223	
482133	2017-09-06T13:34:43.000+0000	common.created						1355490	New Dashboard Funct

Exporting history

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



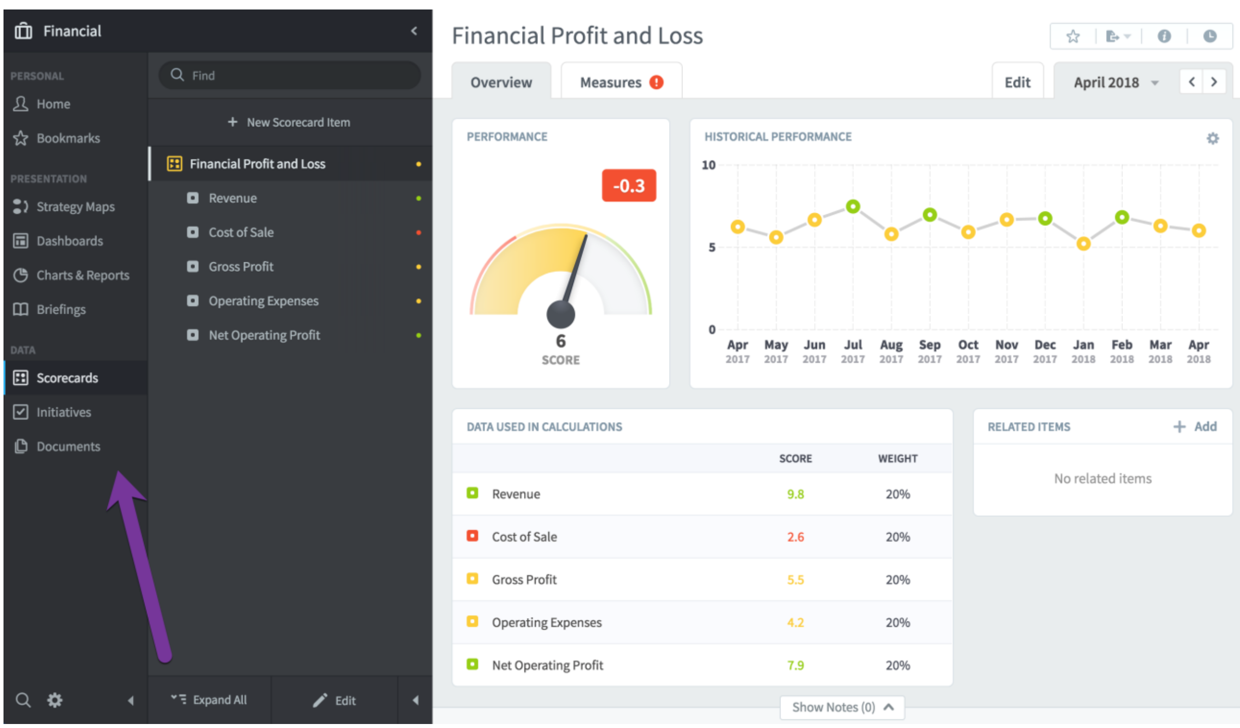
Each option produces a nicely formatted report of the history data. For example, this is what the PDF export looks like.



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.



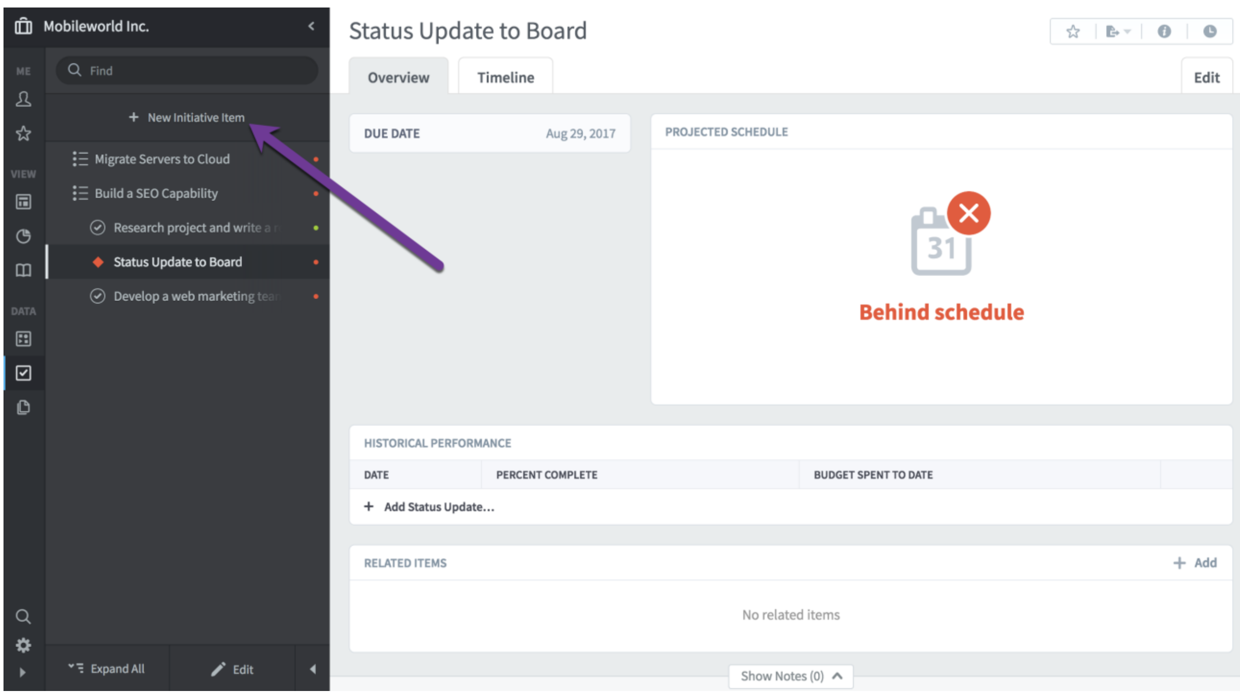
On the bottom is "Data," which contains Scorecards, Initiatives, and Documents. These are the low-level sections that contain your actual performance data.

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.

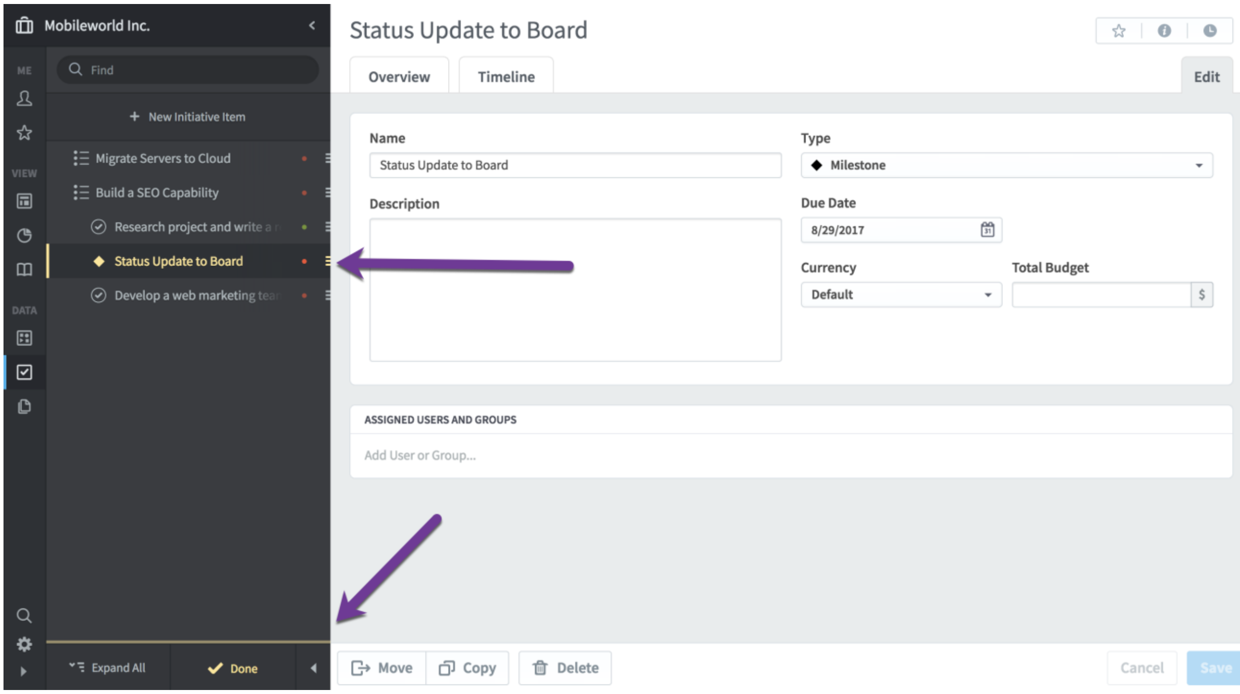
At the top is “Personal,” which has the Home and Bookmark sections. These are the two sections that are unique to every user and are most likely the first things you’ll want to visit when using the software. The Home section is on top now, because that’s what people automatically see when they first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



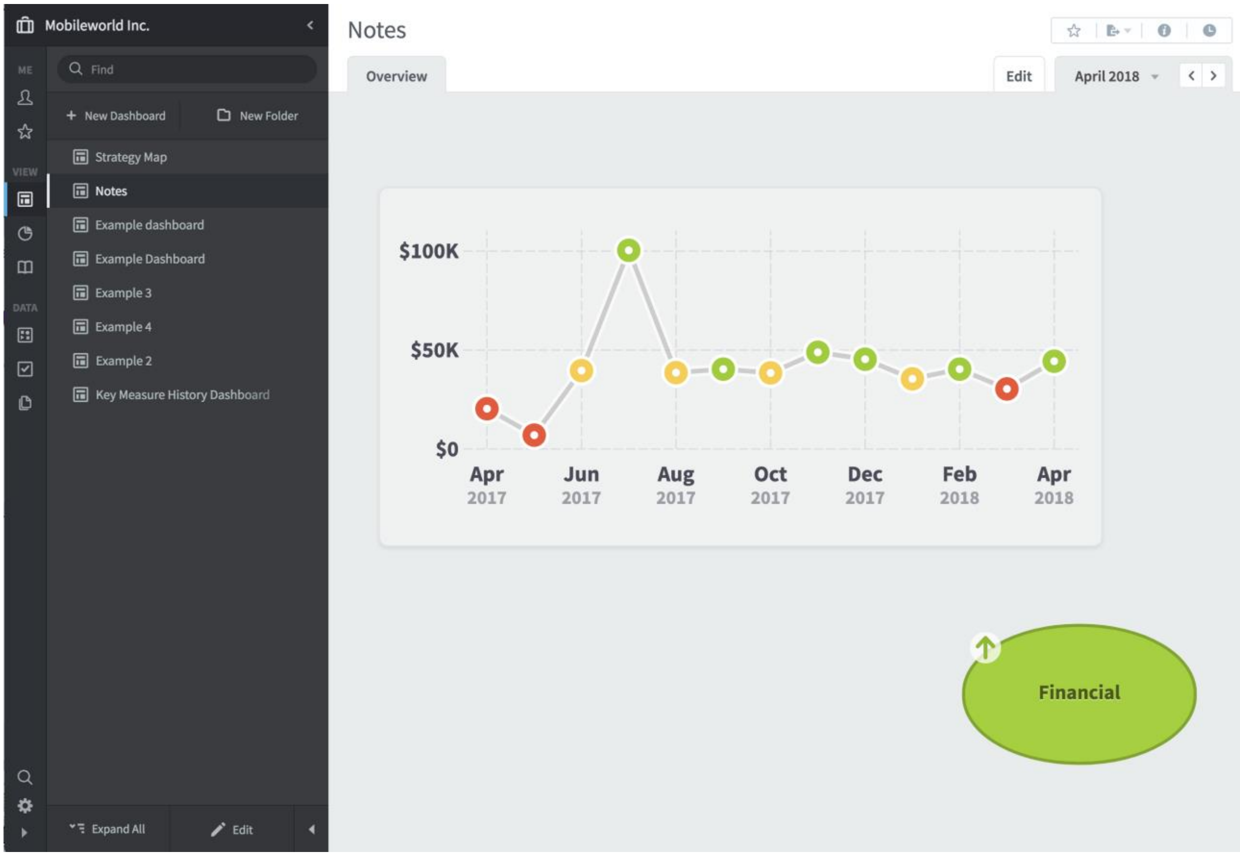
We’ve also changed the appearance of edit mode to more clearly reflect that you’re editing things. The tree is styled with yellow highlights, and the Done button is much more obvious.



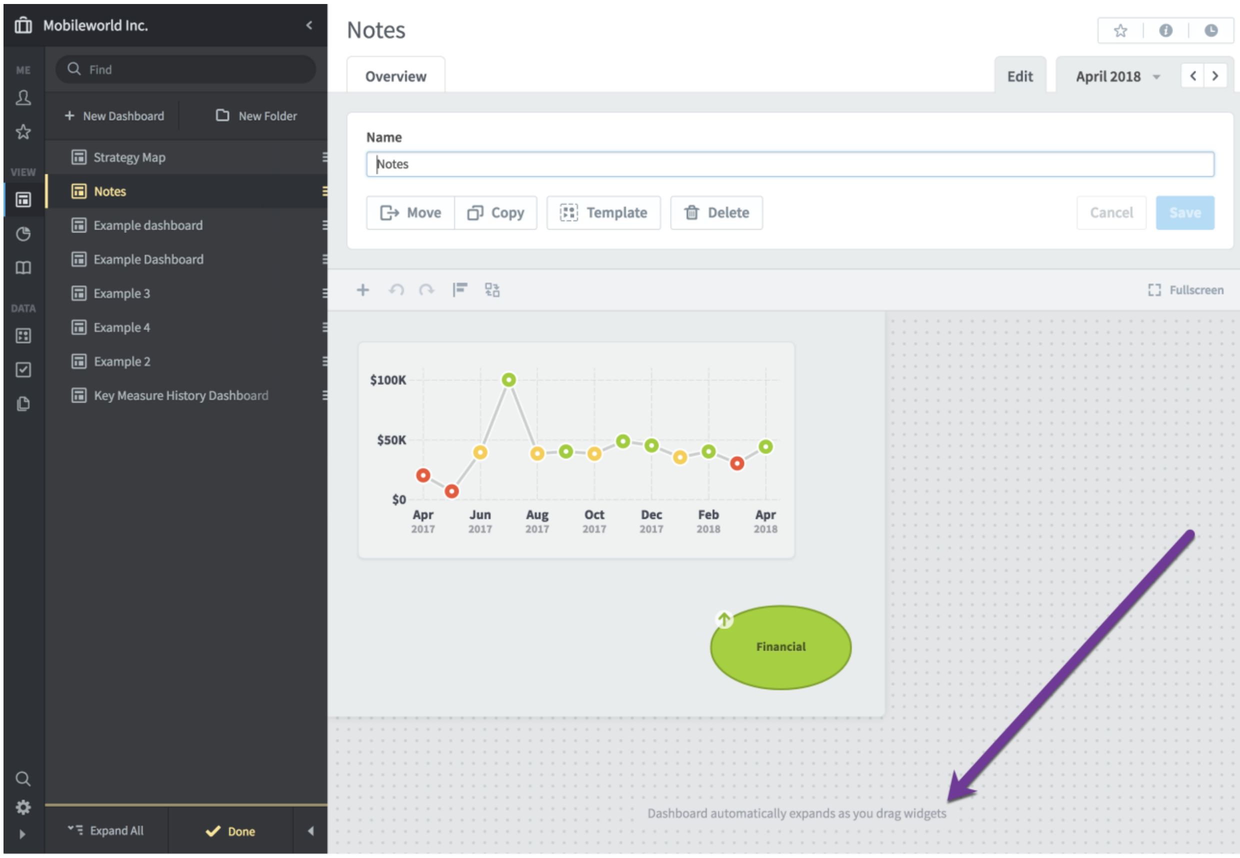
Showing dashboard edges in edit mode

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.

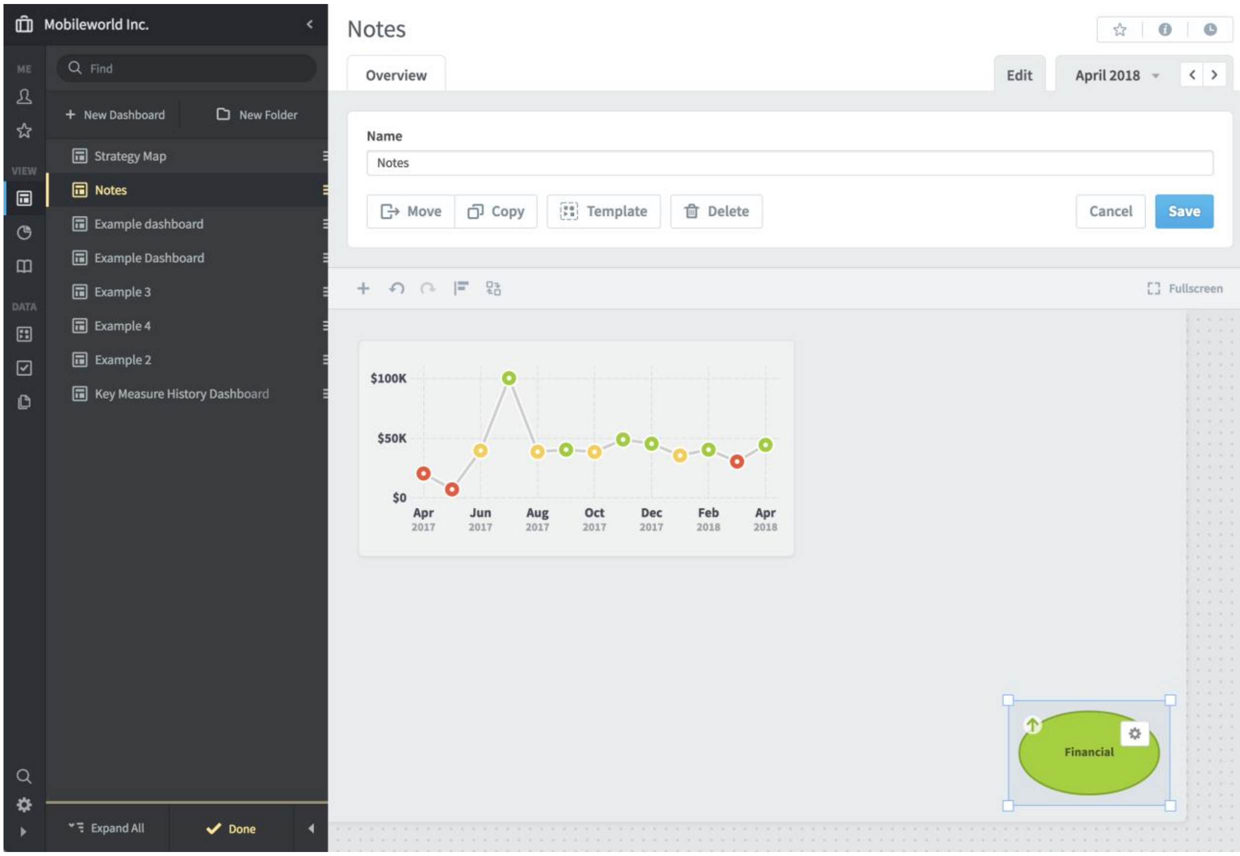
In this example, we'll start with a simple dashboard containing a chart and a bubble.



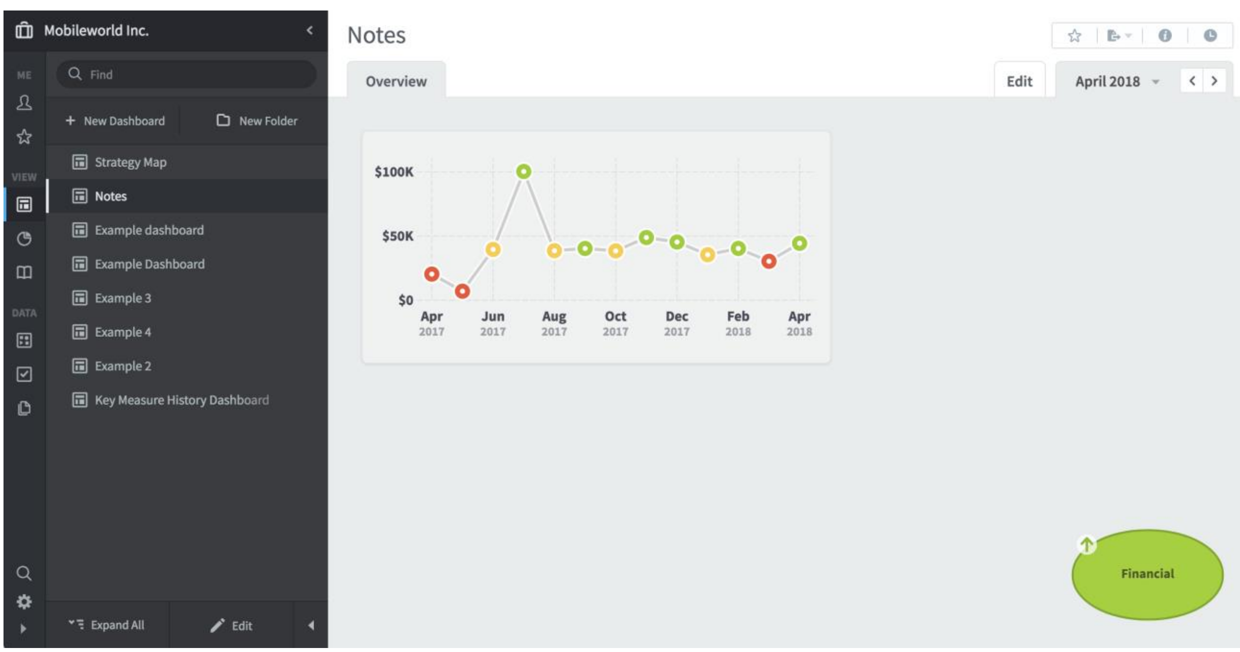
When we go to the Edit tab, we can see what the dashboard looks like without any resizing. There's now a clear visual difference between what will be part of the dashboard and what will not. There's also a message on the bottom explaining that your dashboard will automatically expand as you drag widgets.



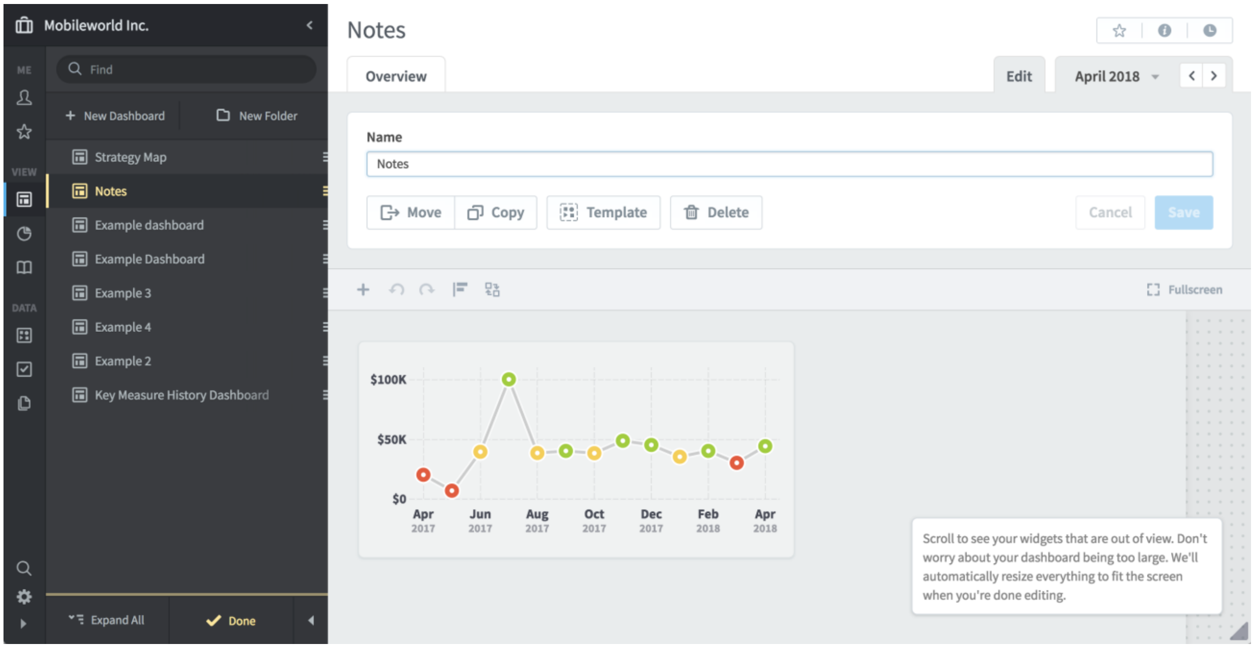
So, we'll do just that. Here we've dragged the bubble down and to the right, and the dashboard canvas expands with the bubble as we move it.



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.

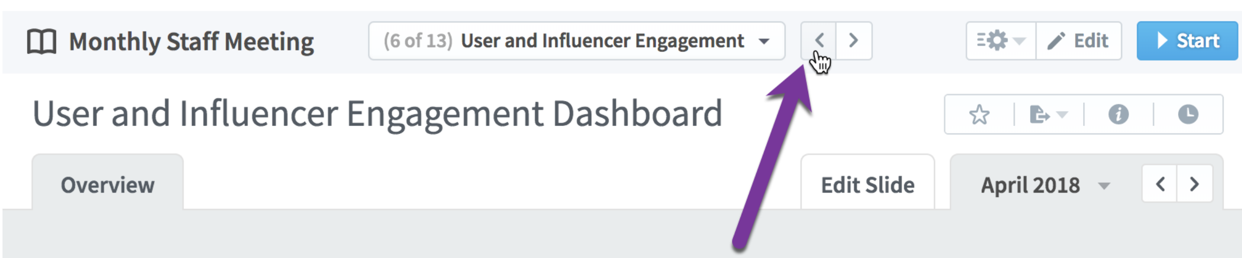


Of course, there will be times when your dashboards are so big in edit mode that you have to scroll to see all of the widgets. When this happens, we'll show a scroll indicator and a message explaining what's happening.

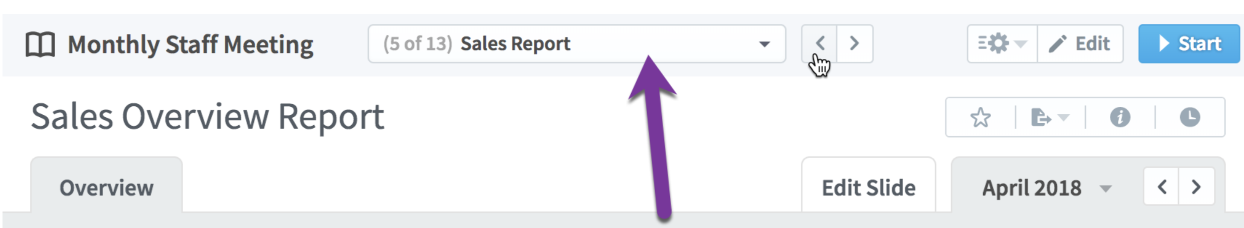


Improved briefing slide arrows

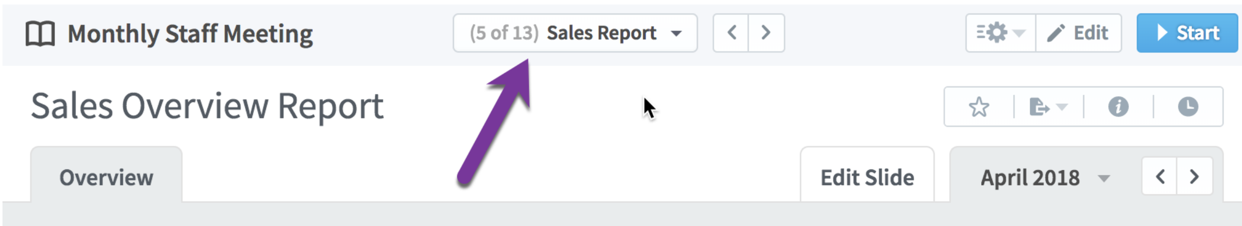
It's now much easier to click through briefing slides quickly without moving your mouse. In this example we start on a briefing slide with a longer name.



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.

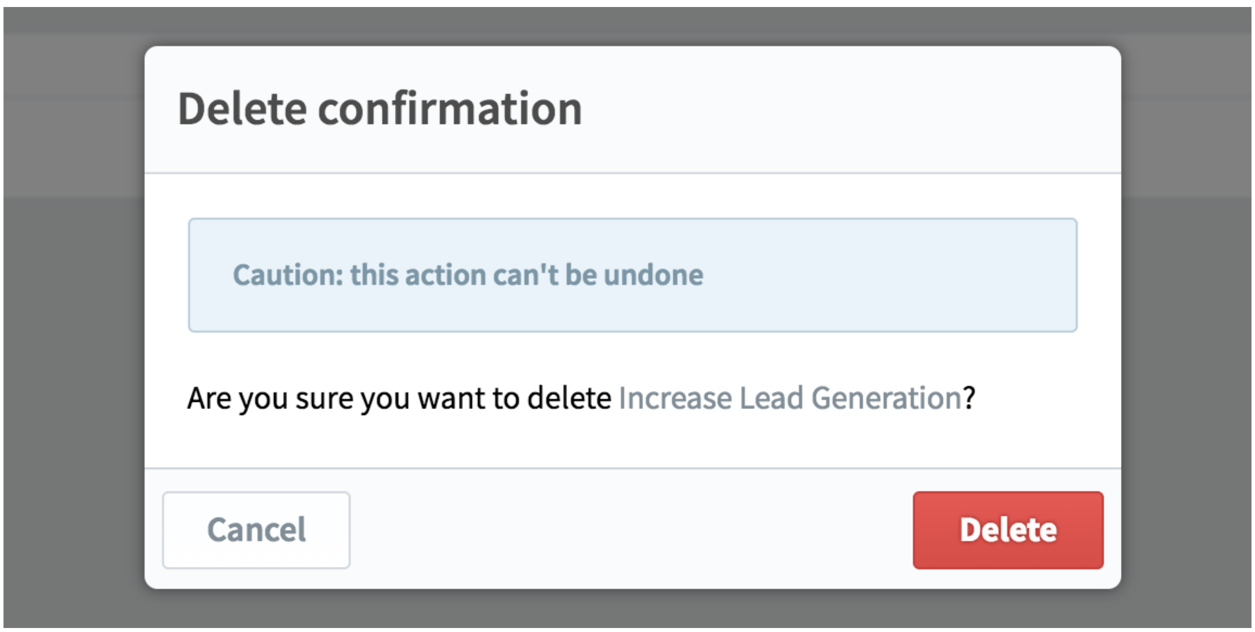


When you move your mouse away from the slide controls, they animate to their new size. By resizing only after a delay, the buttons don't move from underneath your mouse as you're trying to click them.



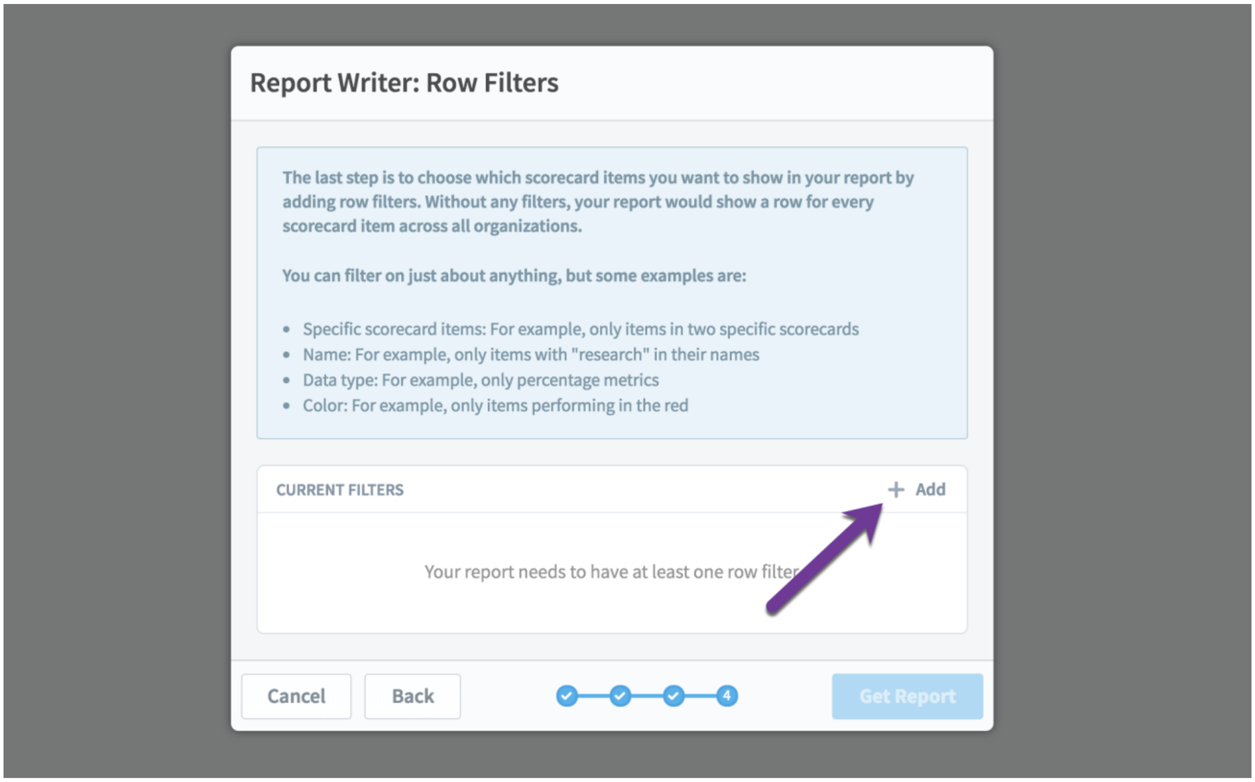
Improved delete warnings

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



Improved sense of depth in modal dialogs

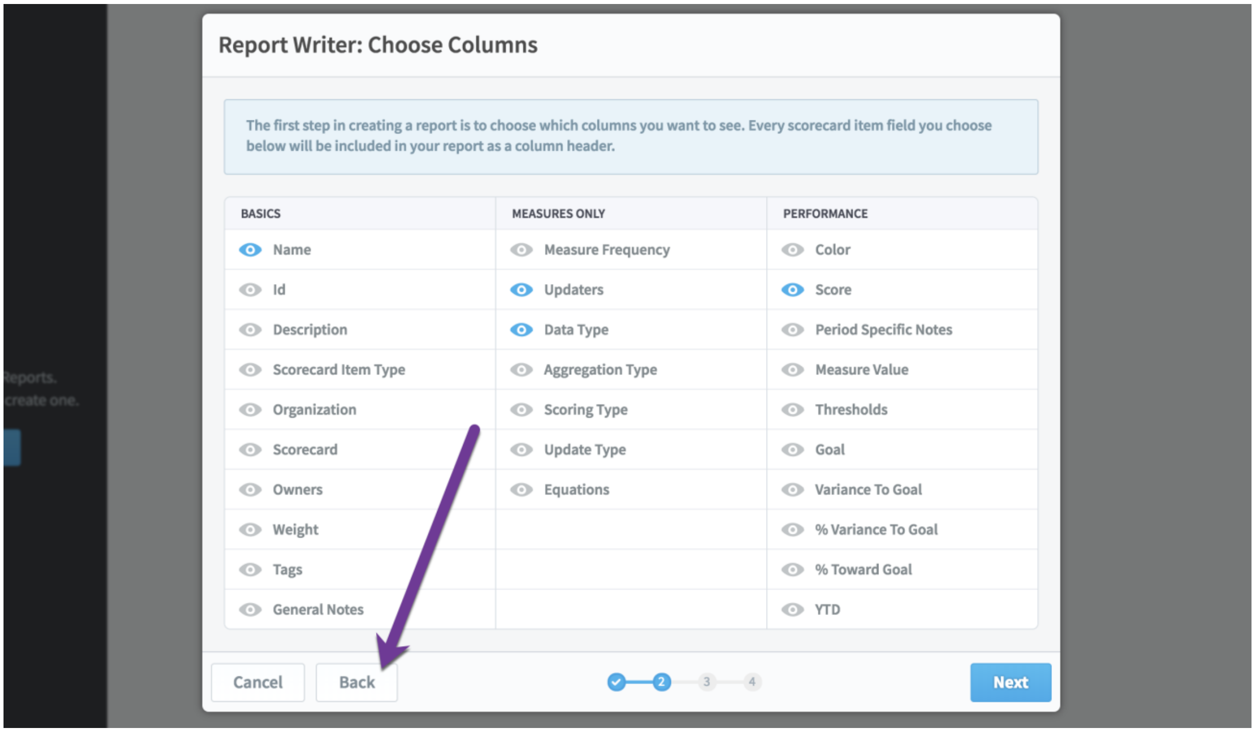
We've added shadows, blurring effects, and size animations to create a feeling of depth with our stacked dialogs. Here's an example dialog.



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.

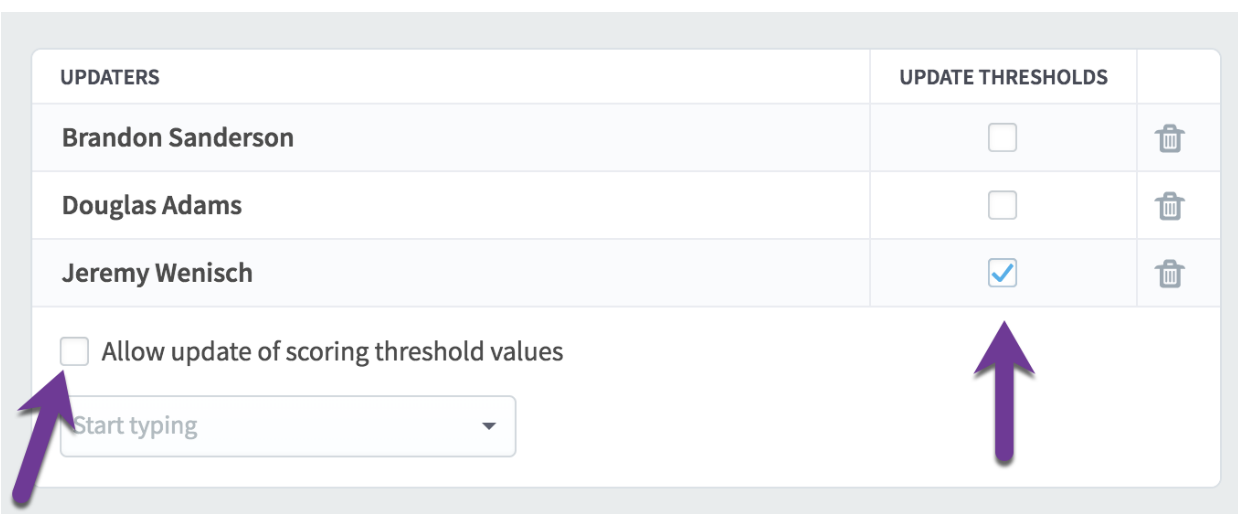
Back buttons in all multi-step dialogs

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.



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.

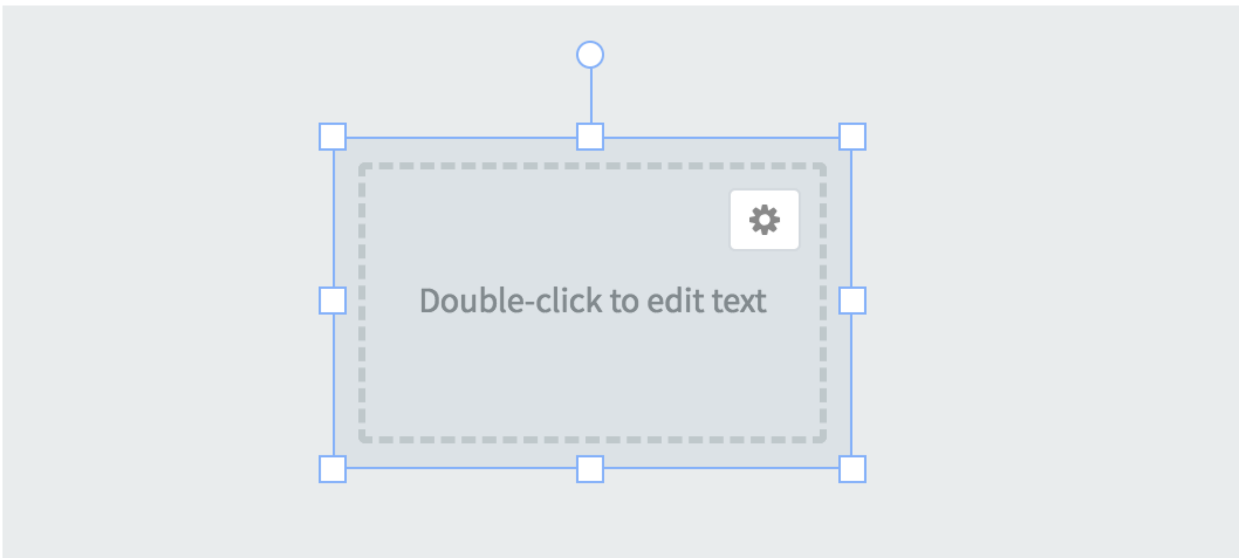


Easier to use dashboard text widgets

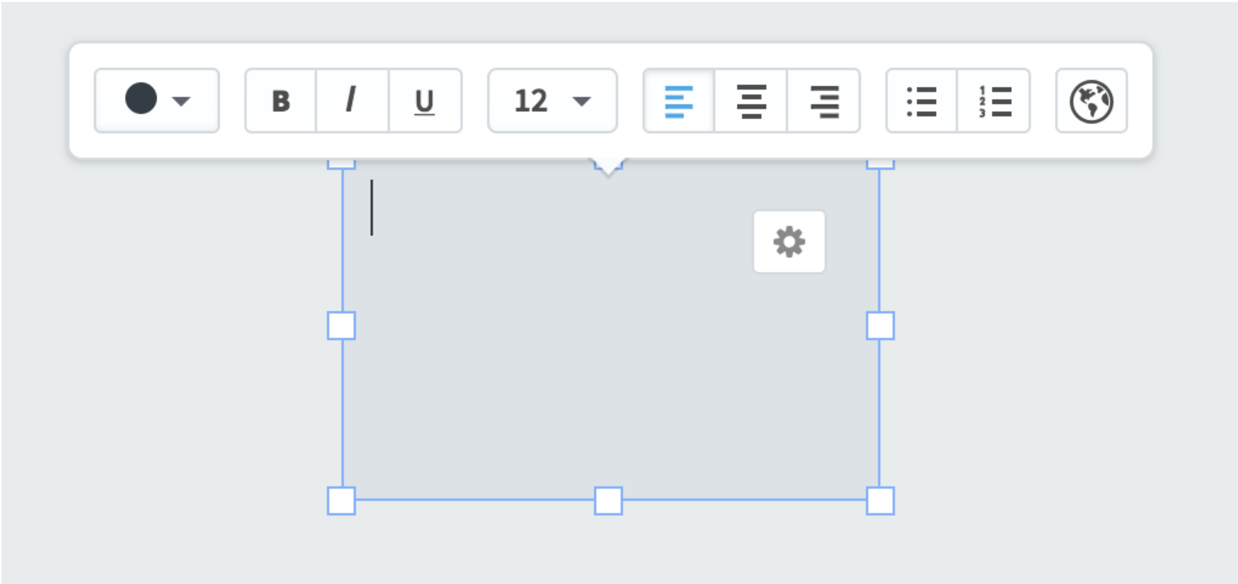
We've redesigned dashboard text widgets to be much easier to use. There are improvements in several different text widget areas, and the overall effect is a much smoother experience.

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.

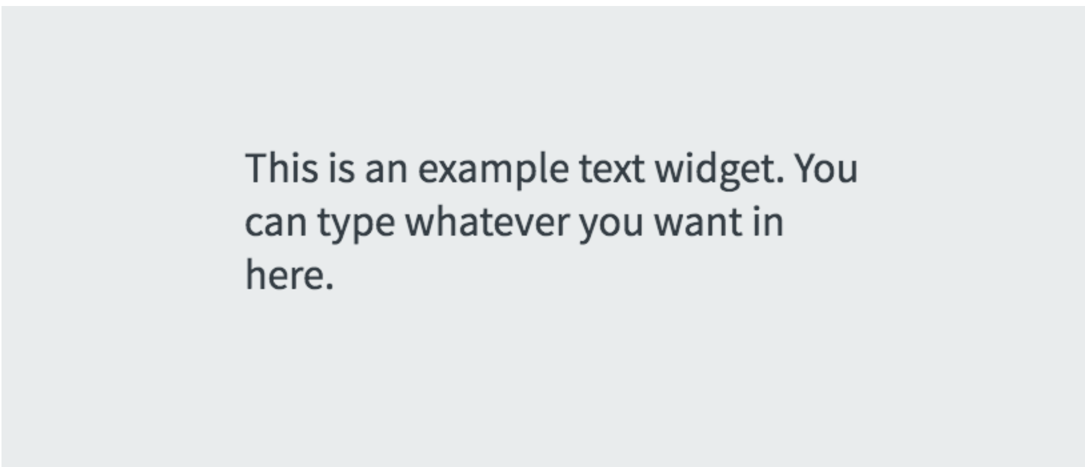
The first time you click on the text widget, it's in selection mode. You can drag it or resize it, but you can't type text yet.



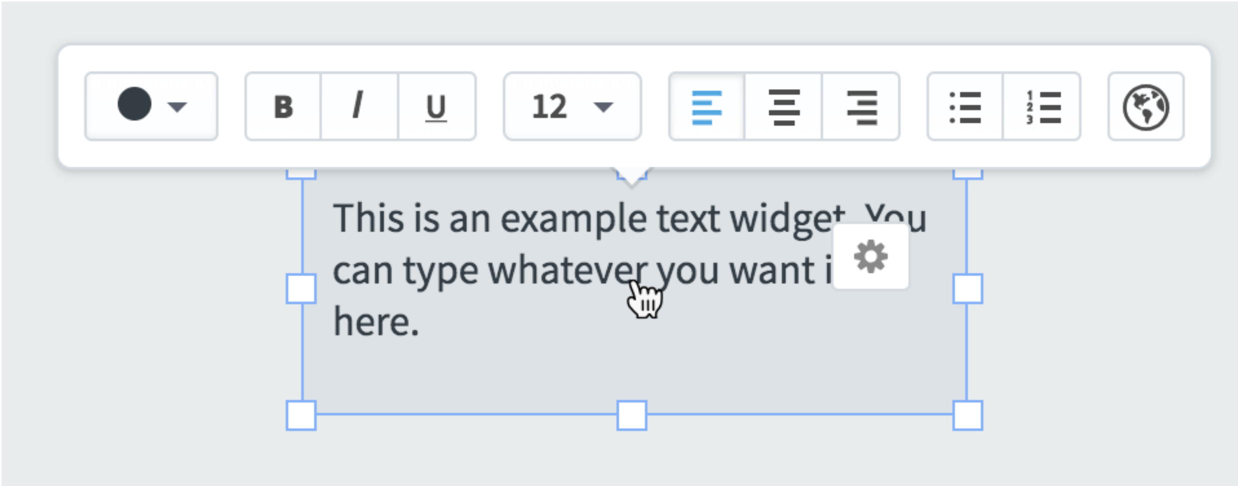
When you click a text widget that's already selected, it goes into edit mode. Now you can edit your text.



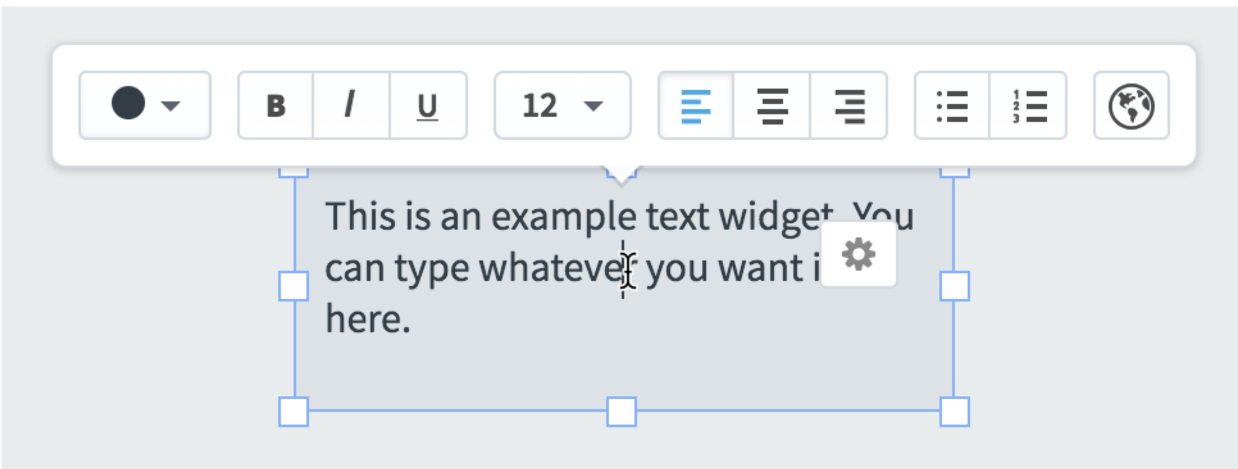
So, we'll type some example text. And, just like any other dashboard widget, when you click away from a text widget, it won't be selected anymore.



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.

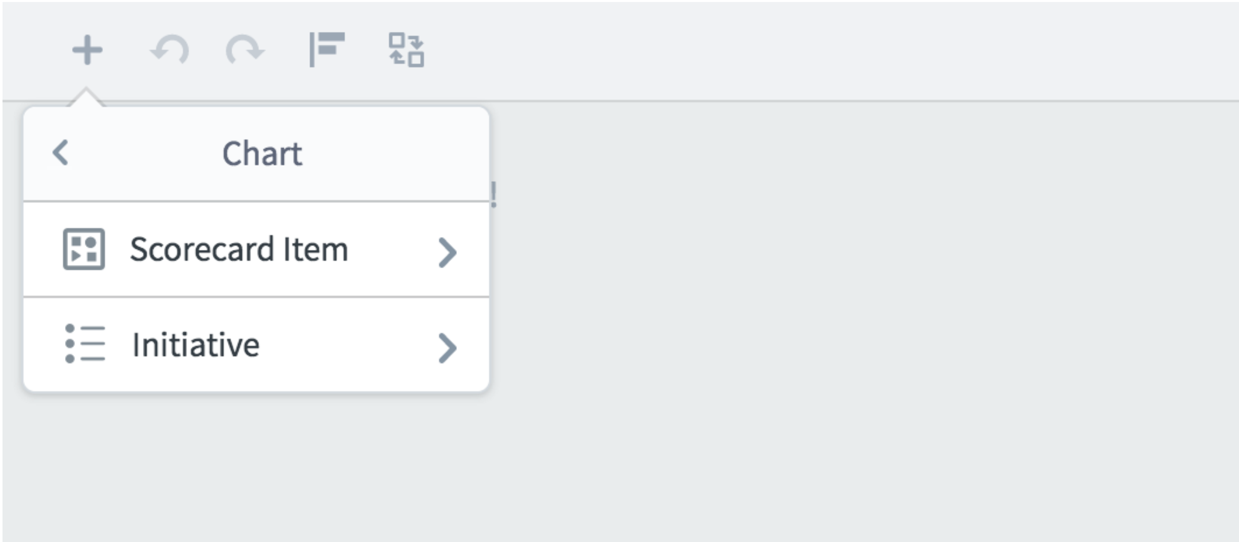


And, if you click on the widget again, it goes into edit mode and you can type different content.

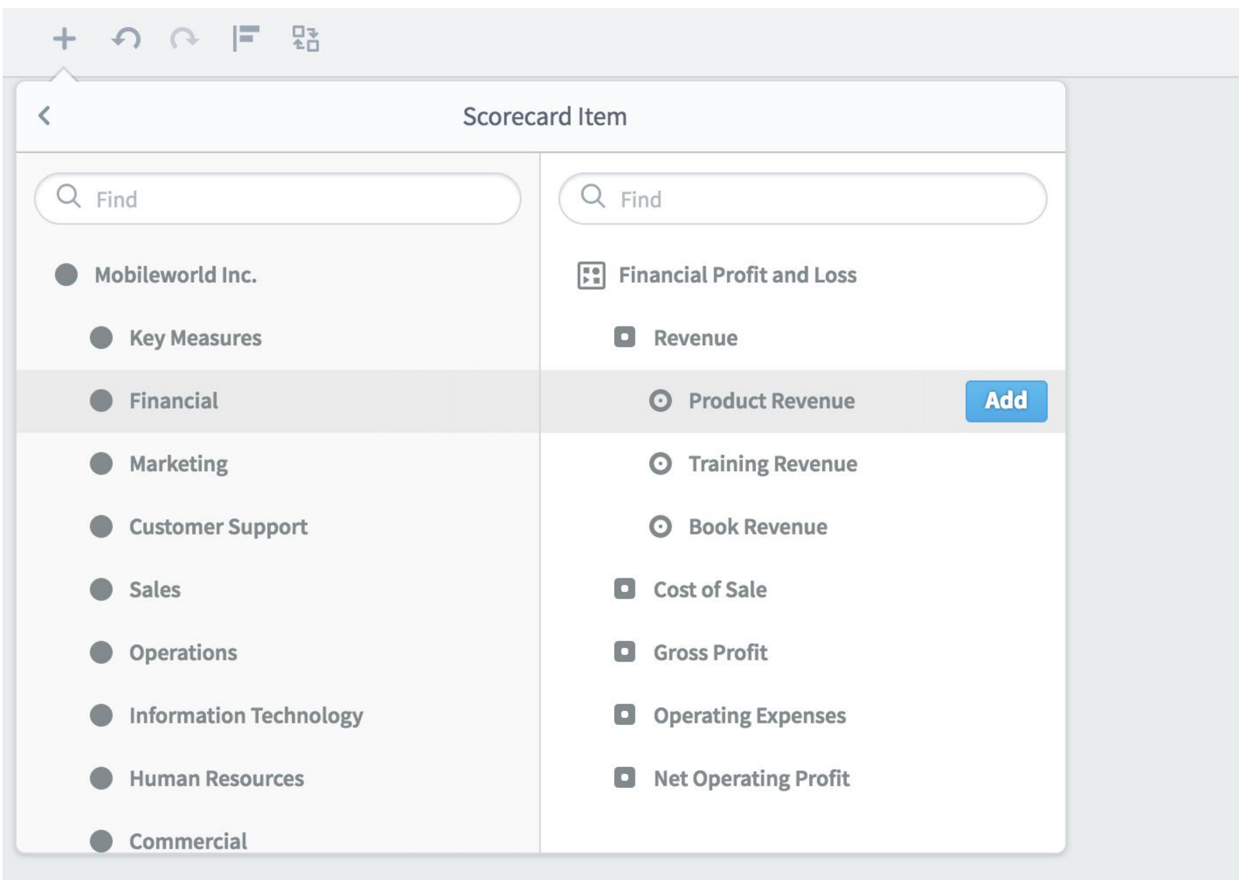


Easier to add chart dashboard widgets

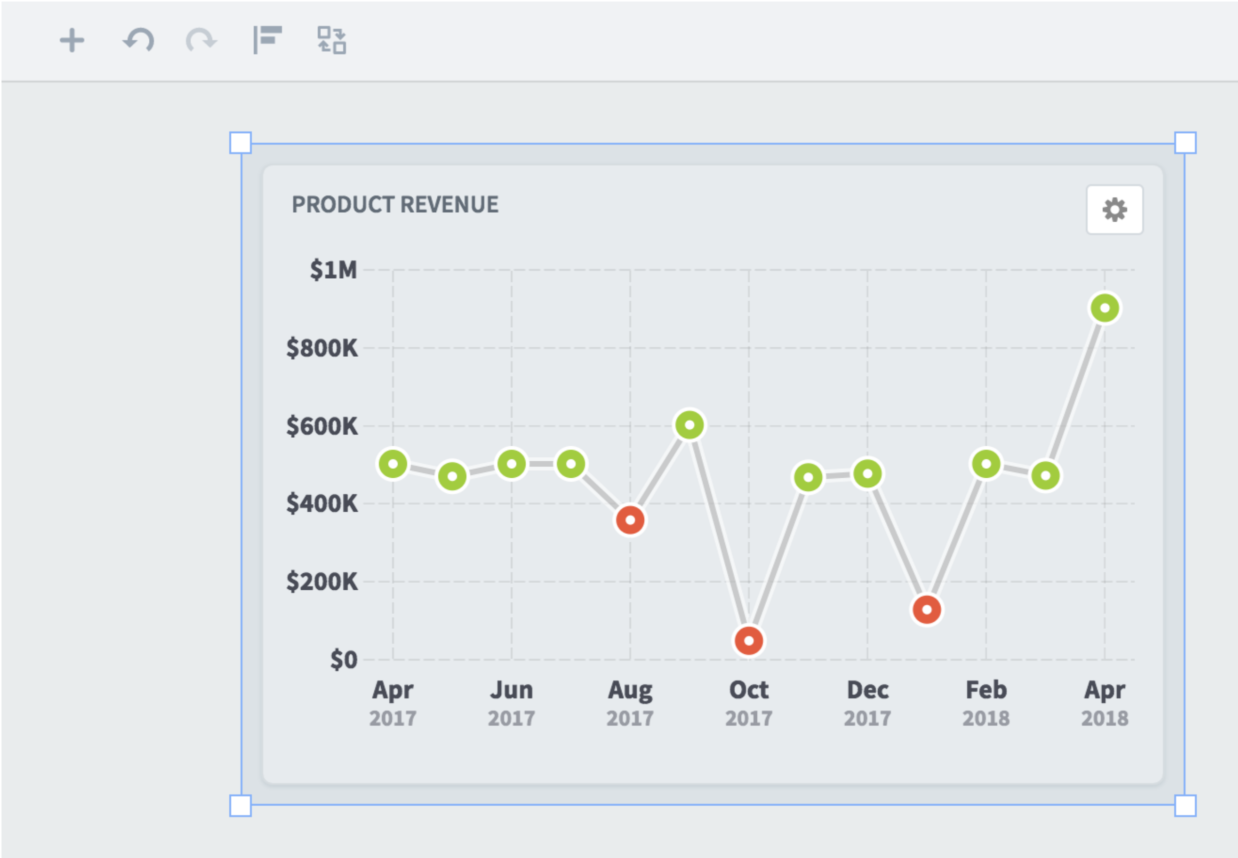
It’s now much easier to add chart widgets to dashboards. First, click the “add widget” button and select Chart. Then select either Scorecard Item or Initiative.



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.



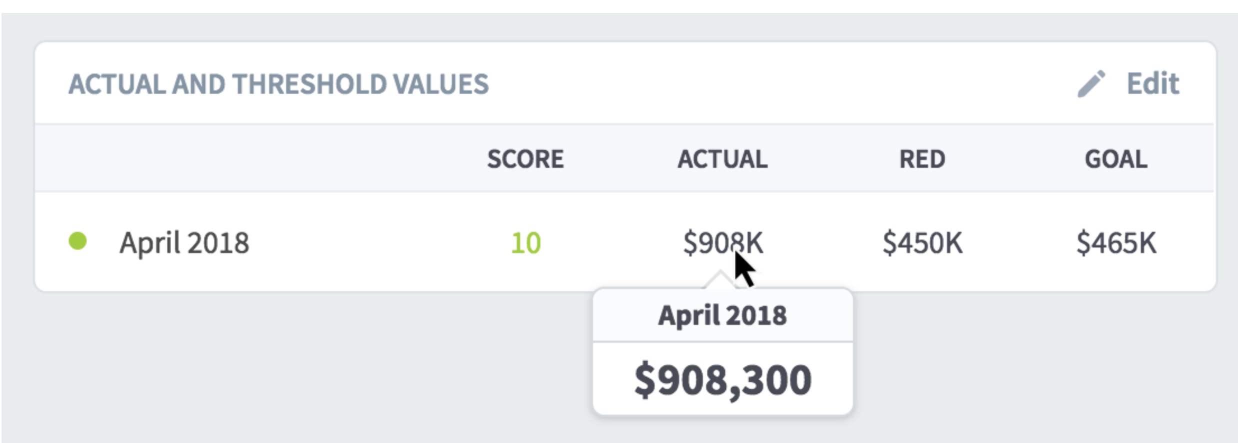
In this example, we've added a chart for Product Revenue. If you want to edit the chart further, just click its configuration gear.



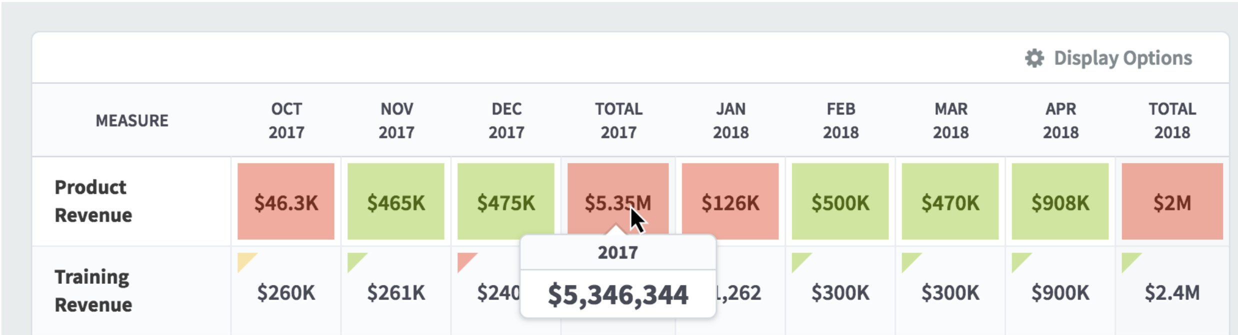
Viewing large numbers without abbreviations

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.

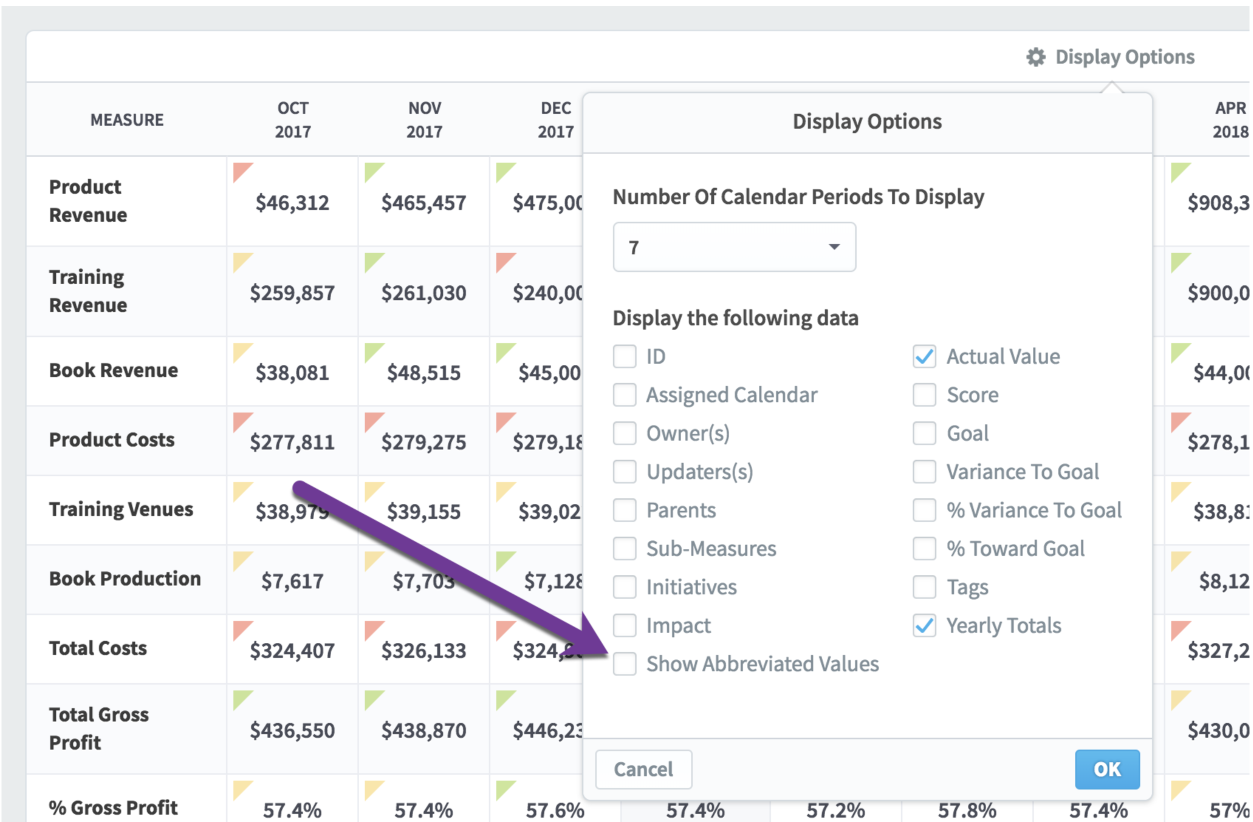
For example, on the Scorecards Overview tab you can hover your mouse over any abbreviated value to see the full version.



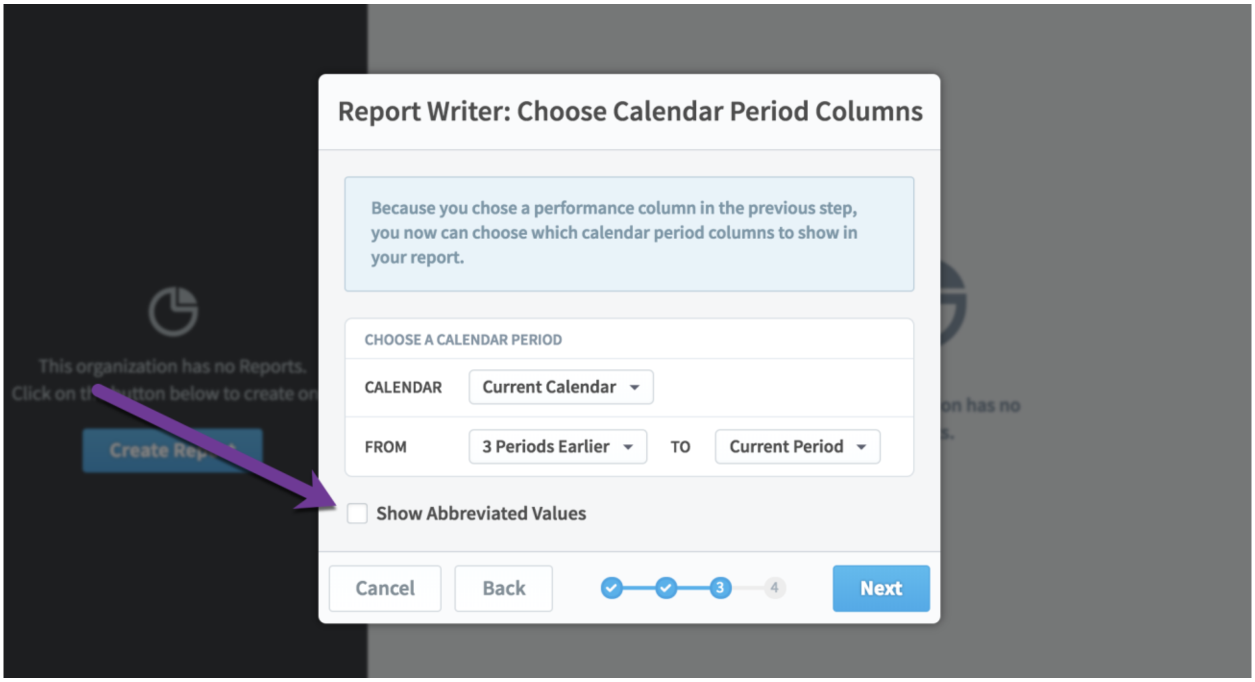
On the Scorecards Measures tab, you can do the same thing.



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



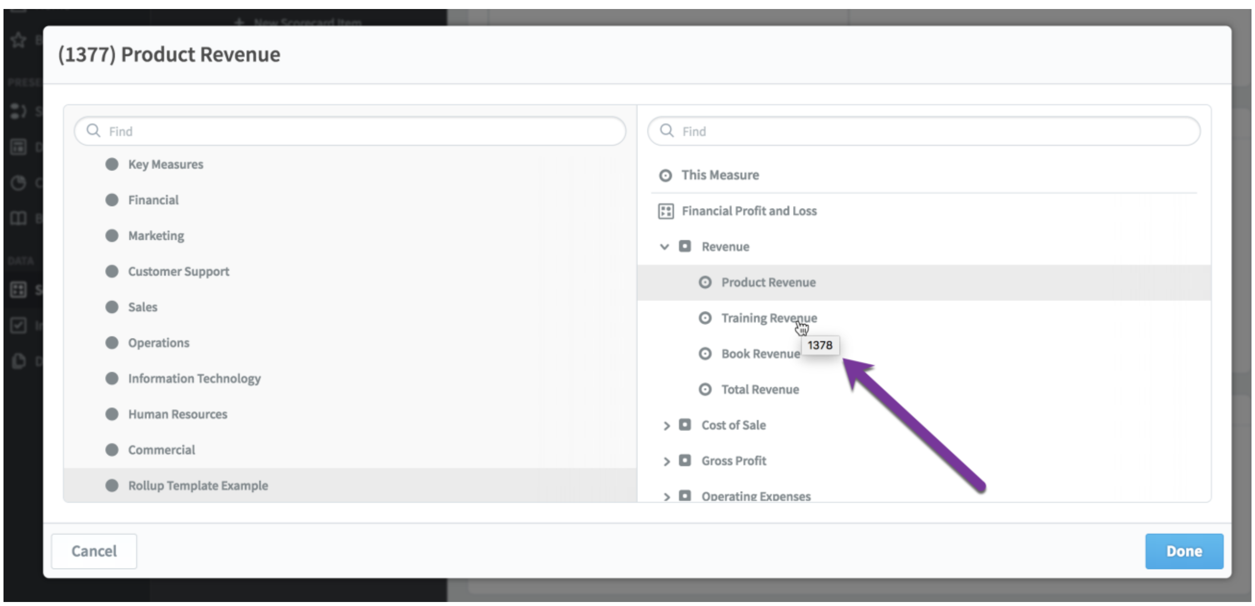
You can choose to "Show Abbreviated Values" in the Reports section too.



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

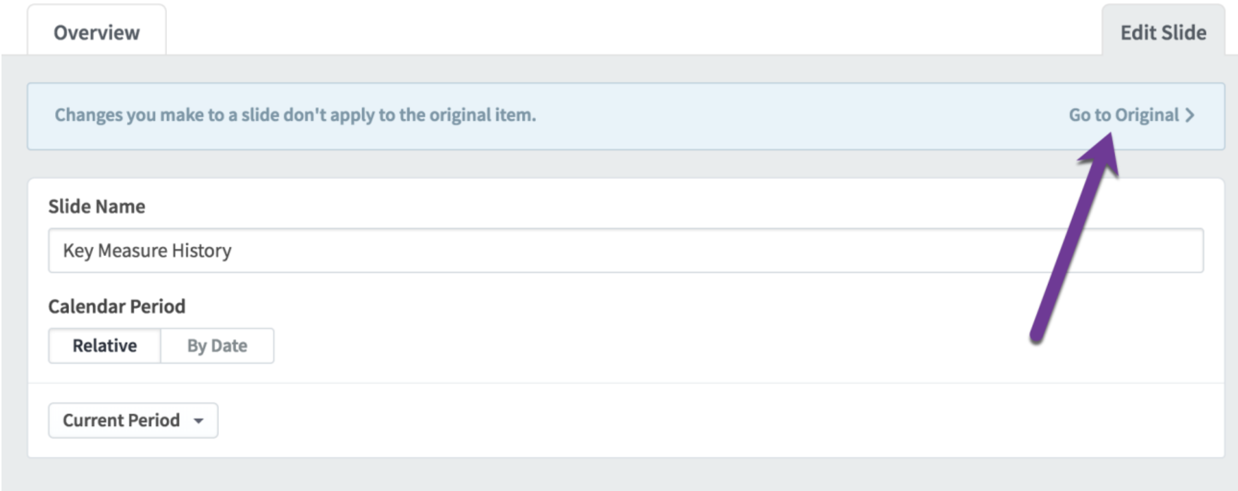
Viewing measure IDs when building equations

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



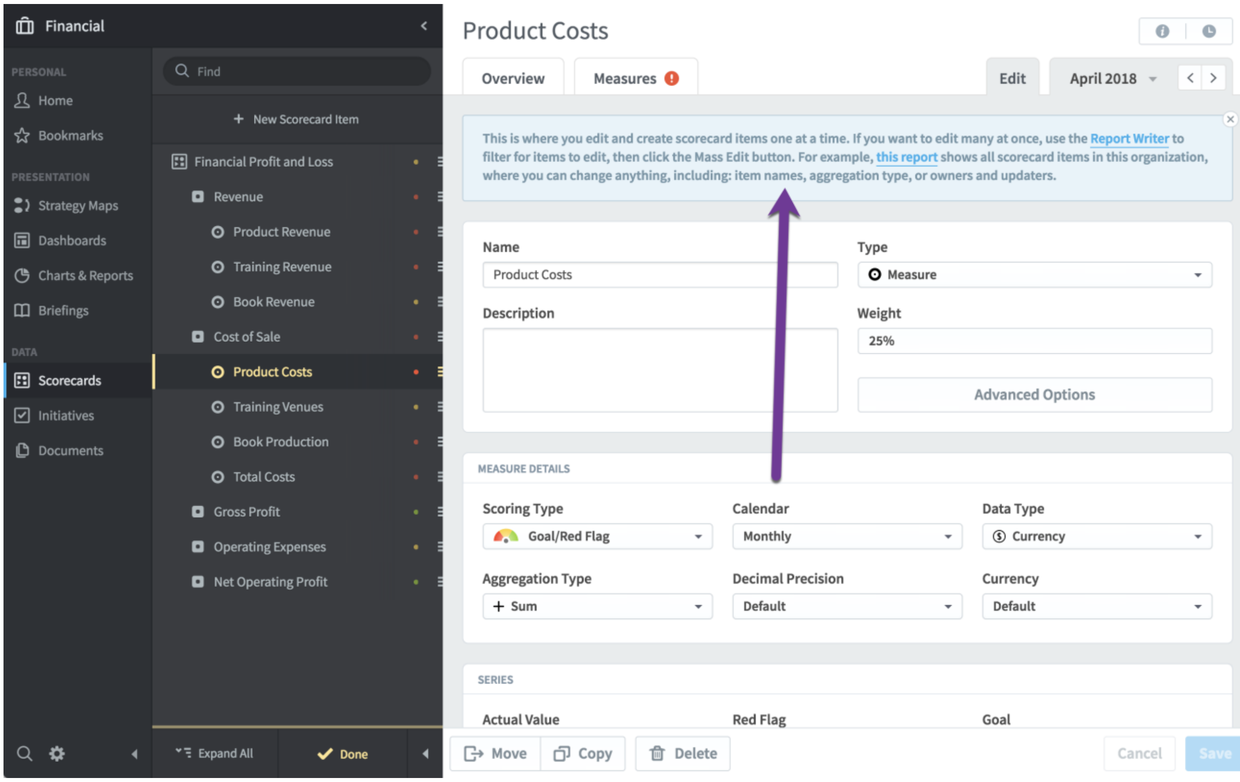
Visiting source item when editing briefing slides

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.



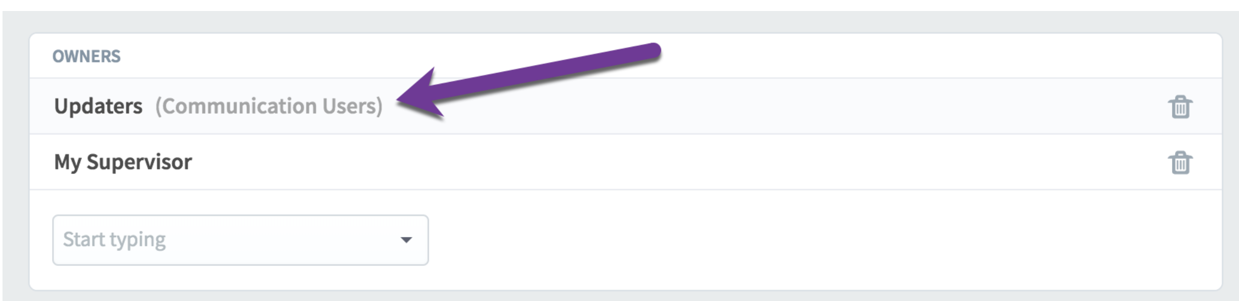
Visiting mass-edit from Scorecards Edit tab

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.



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.

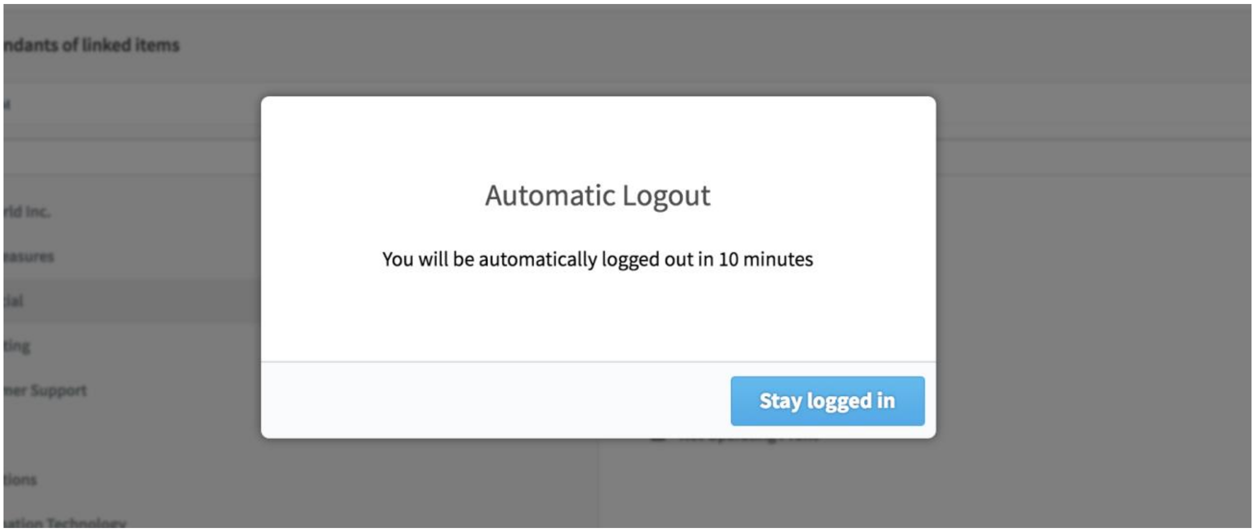


General

Automatic logout prompt

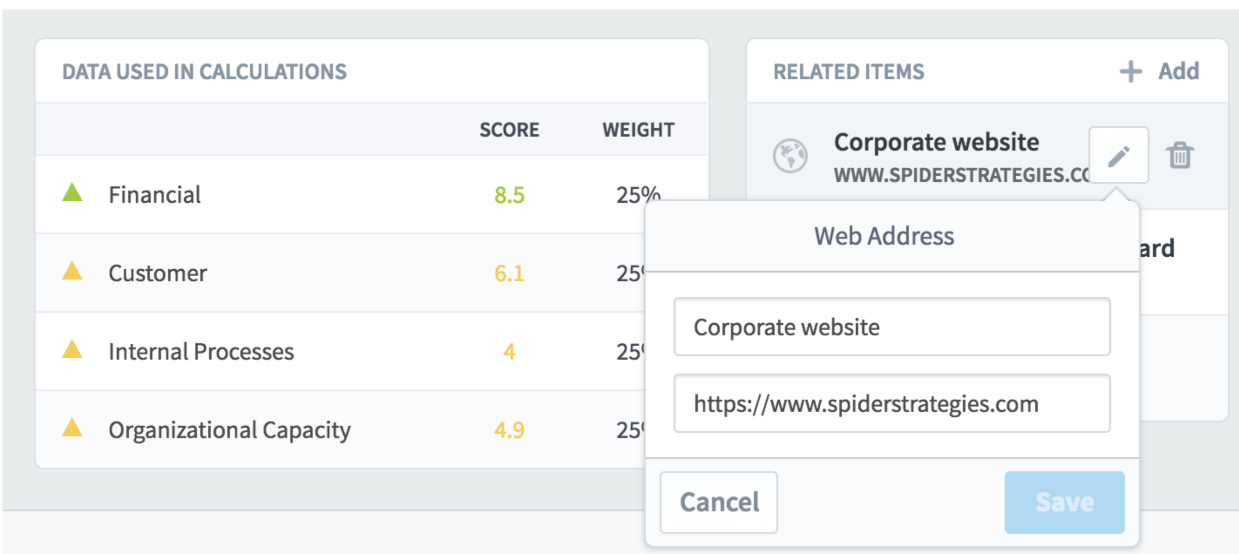
QuickScore automatically logs you out when you haven't clicked on anything for an hour. After 50 minutes of inactivity, we now open a dialog saying that you will be logged out in 10 minutes.

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



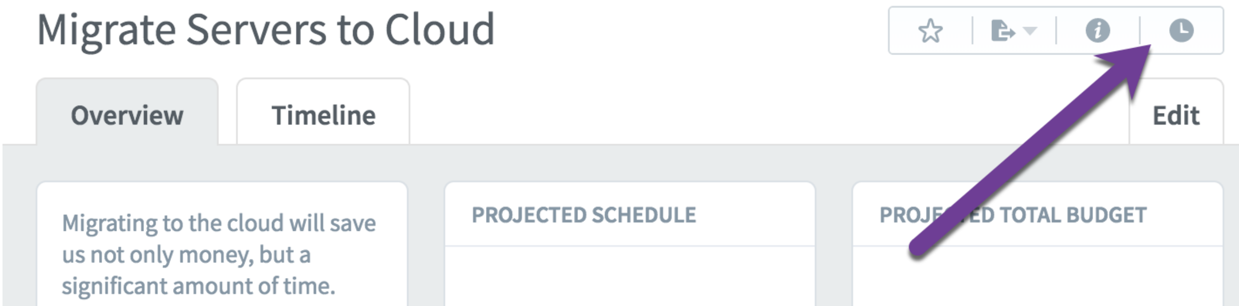
Editing related item URLs

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

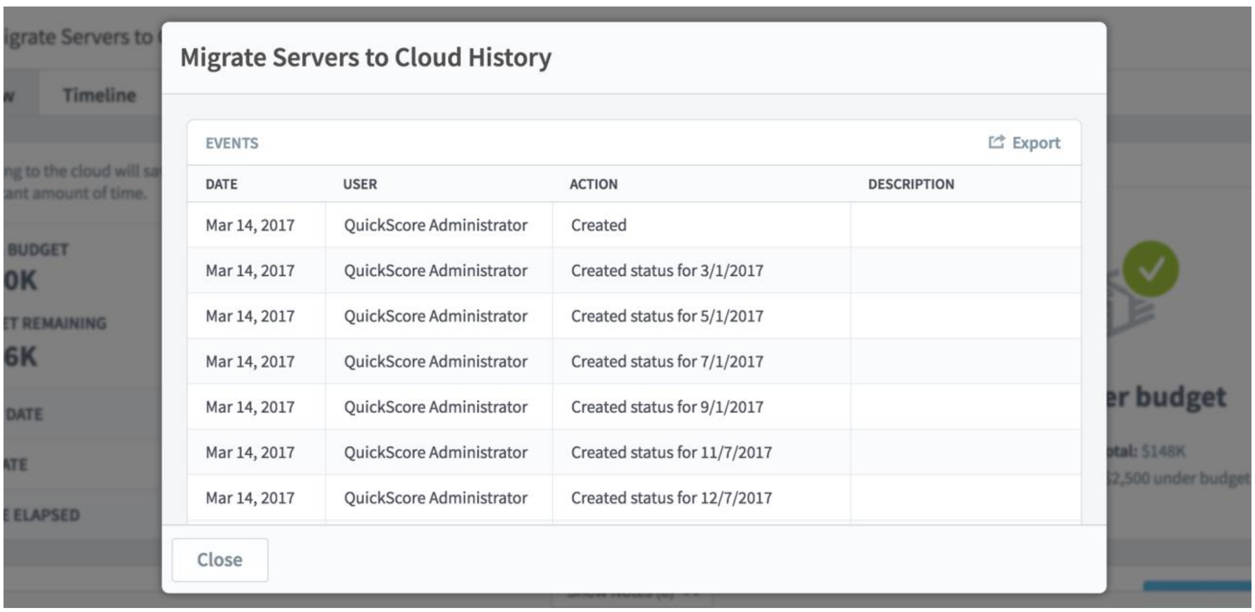


Anyone can view item history

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



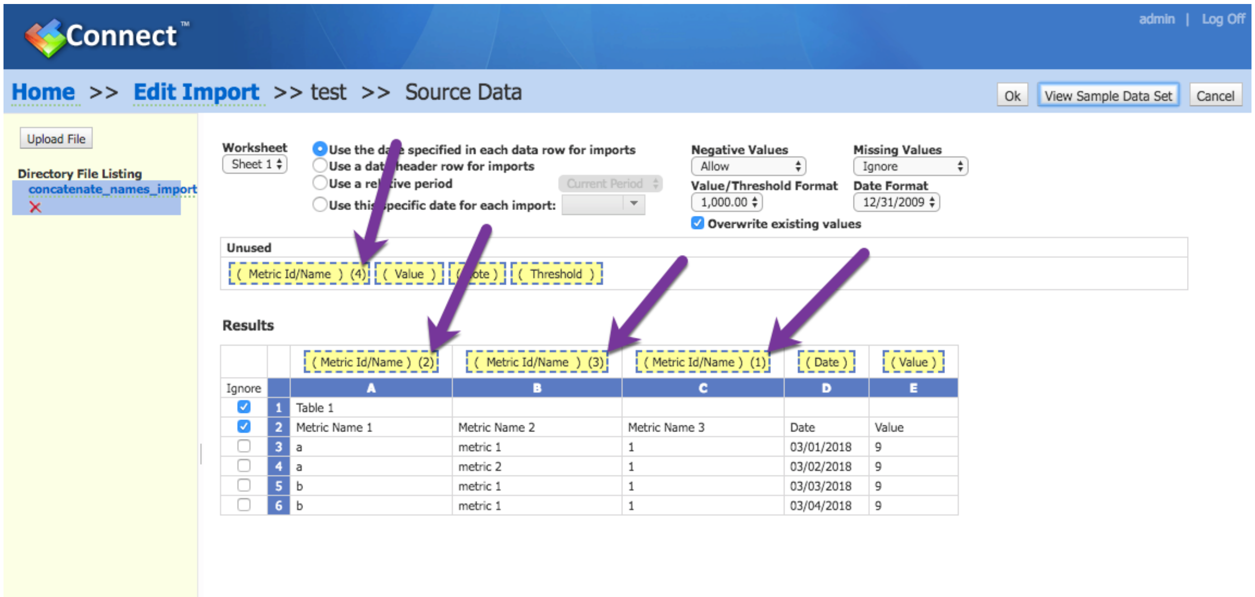
For example, here's what the history dialog looks like for a "Migrate Servers to Cloud" initiative.



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.



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.

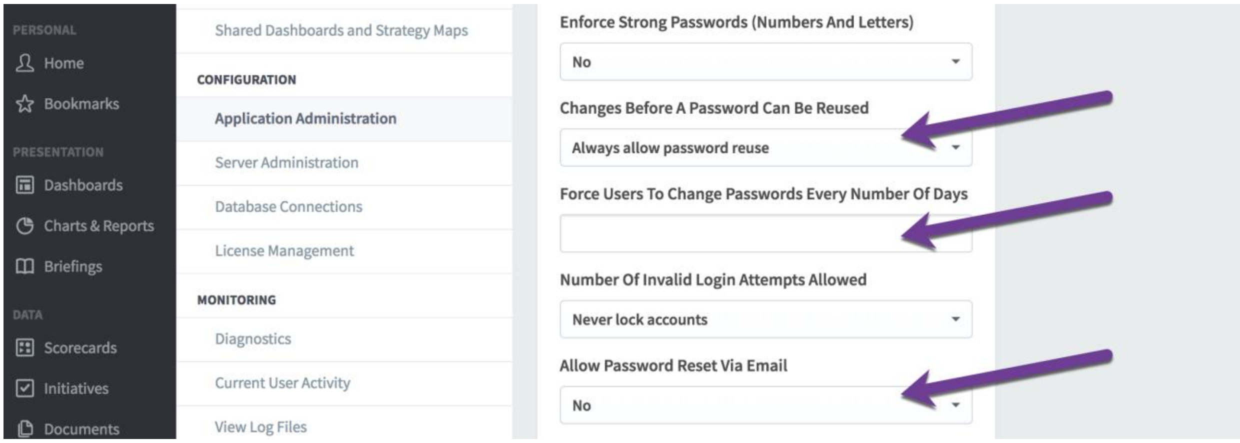
Admin

Setting advanced password options

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

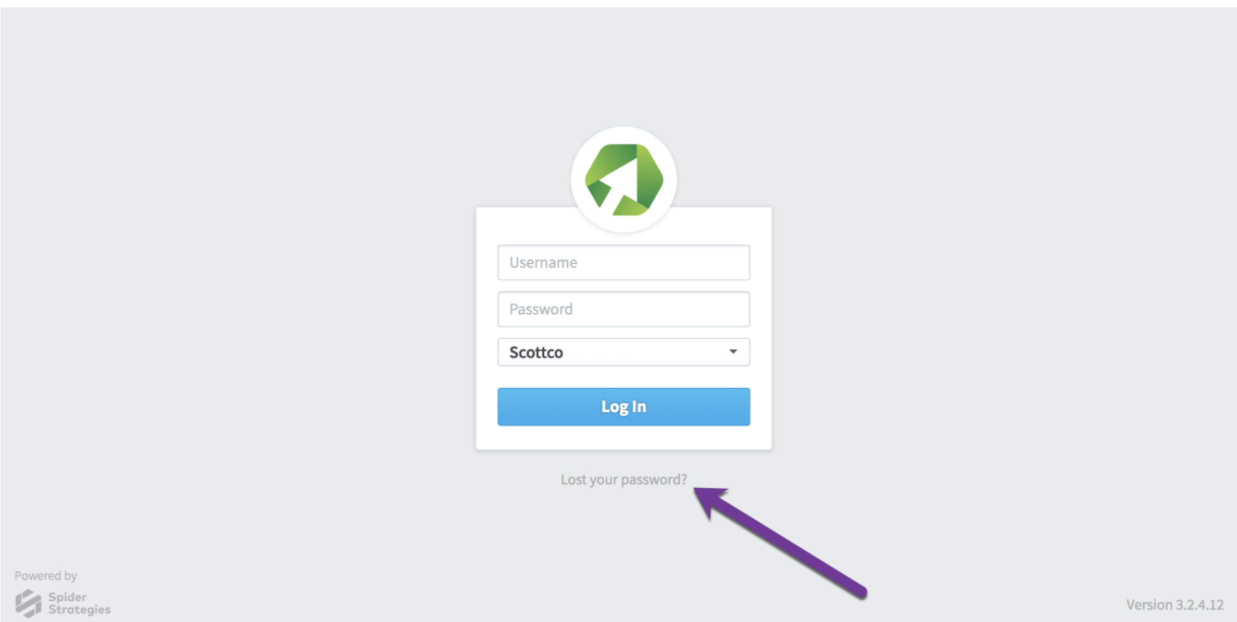
- Number of changes before a password can be reused.
- Force users to change passwords every X number of days.

- Allow password reset via email.

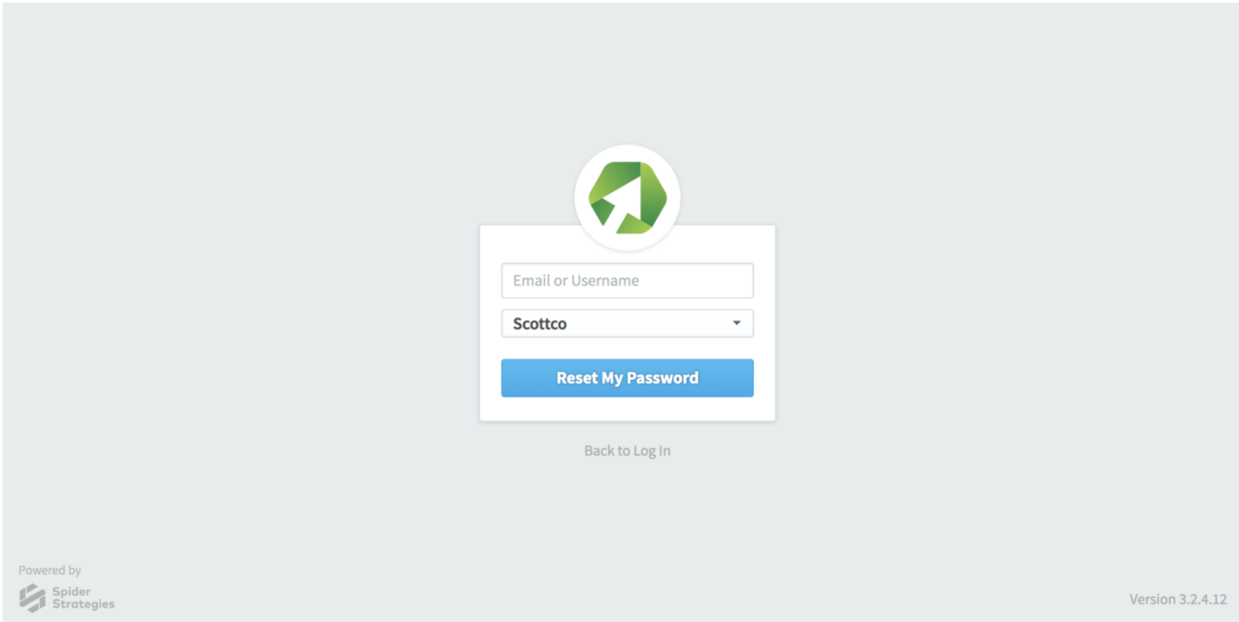


Resetting passwords via email

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.

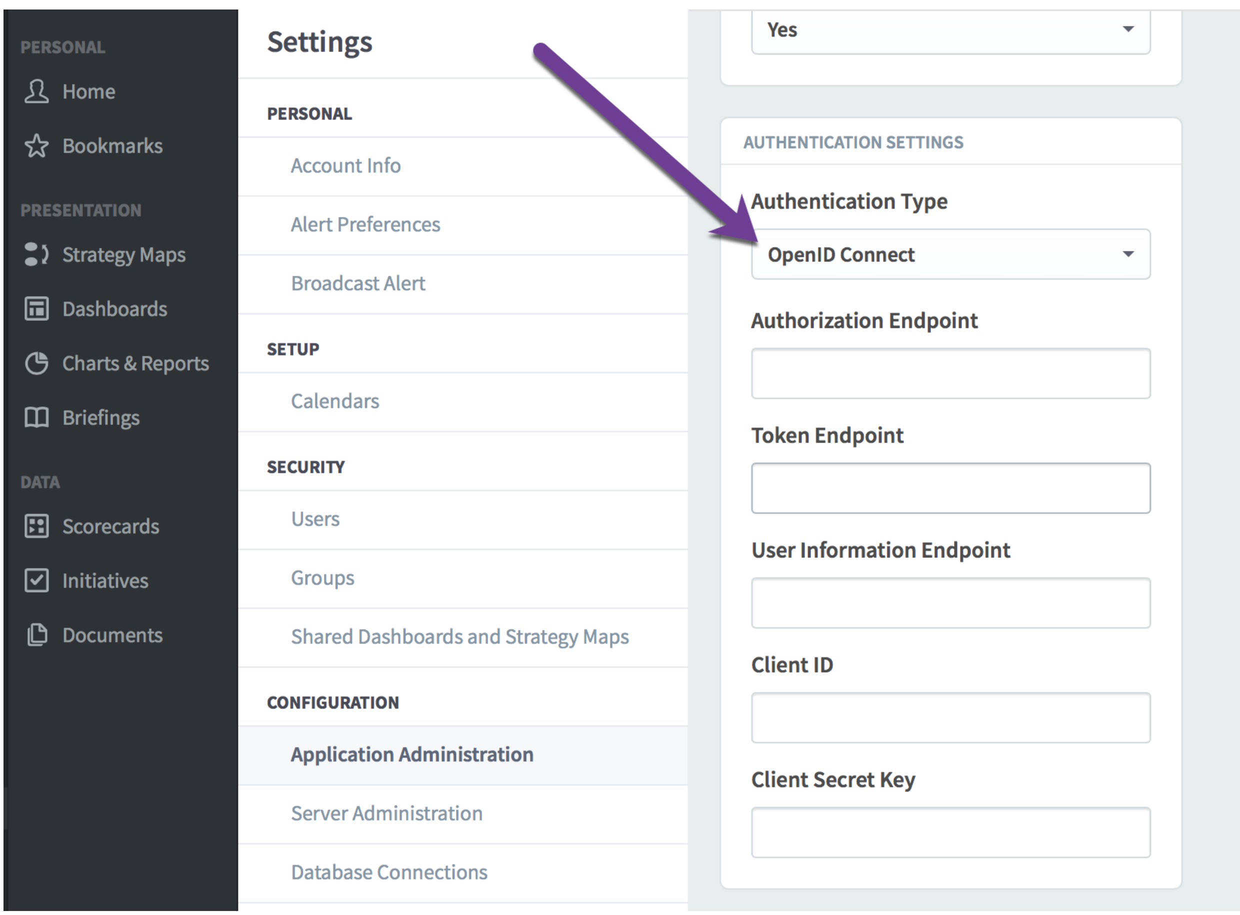


When you click the link, the login box changes to a password reset form. All you have to do is type in your email or username and click the Reset My Password button. QuickScore will then email you a password reset email.

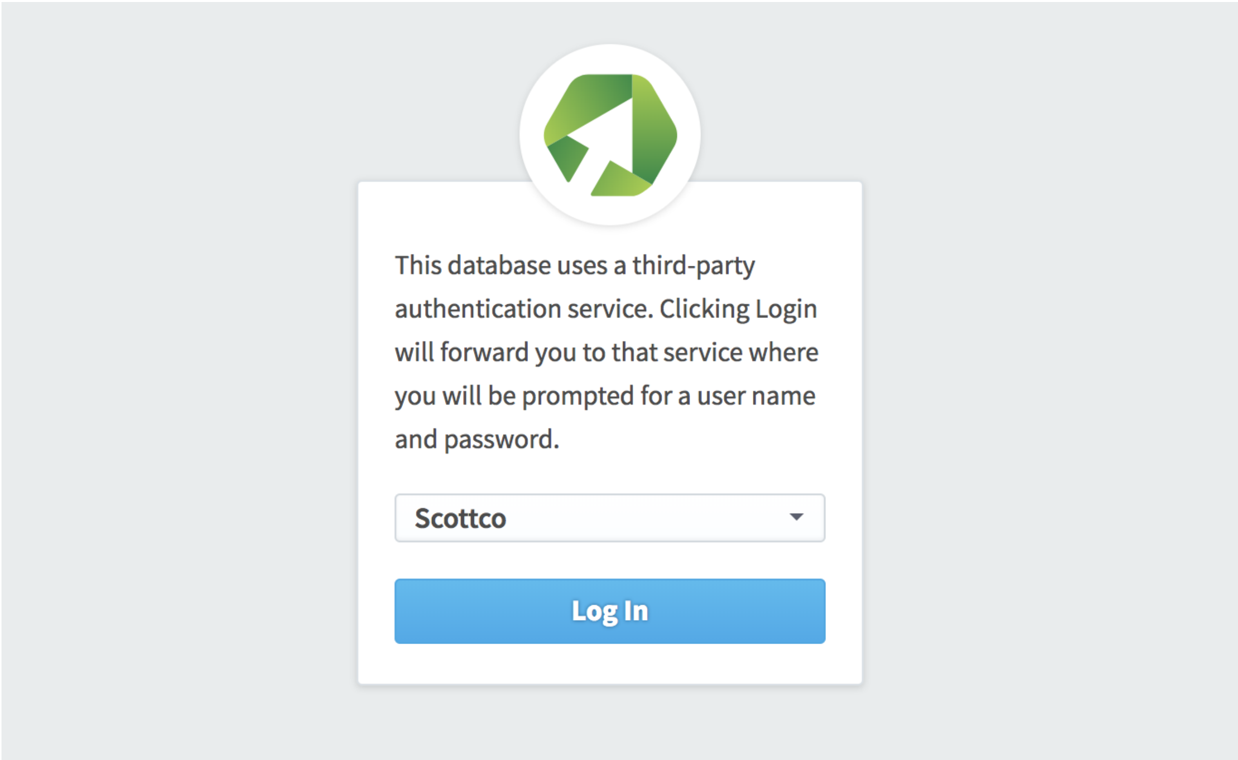


Authenticating with OpenID

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

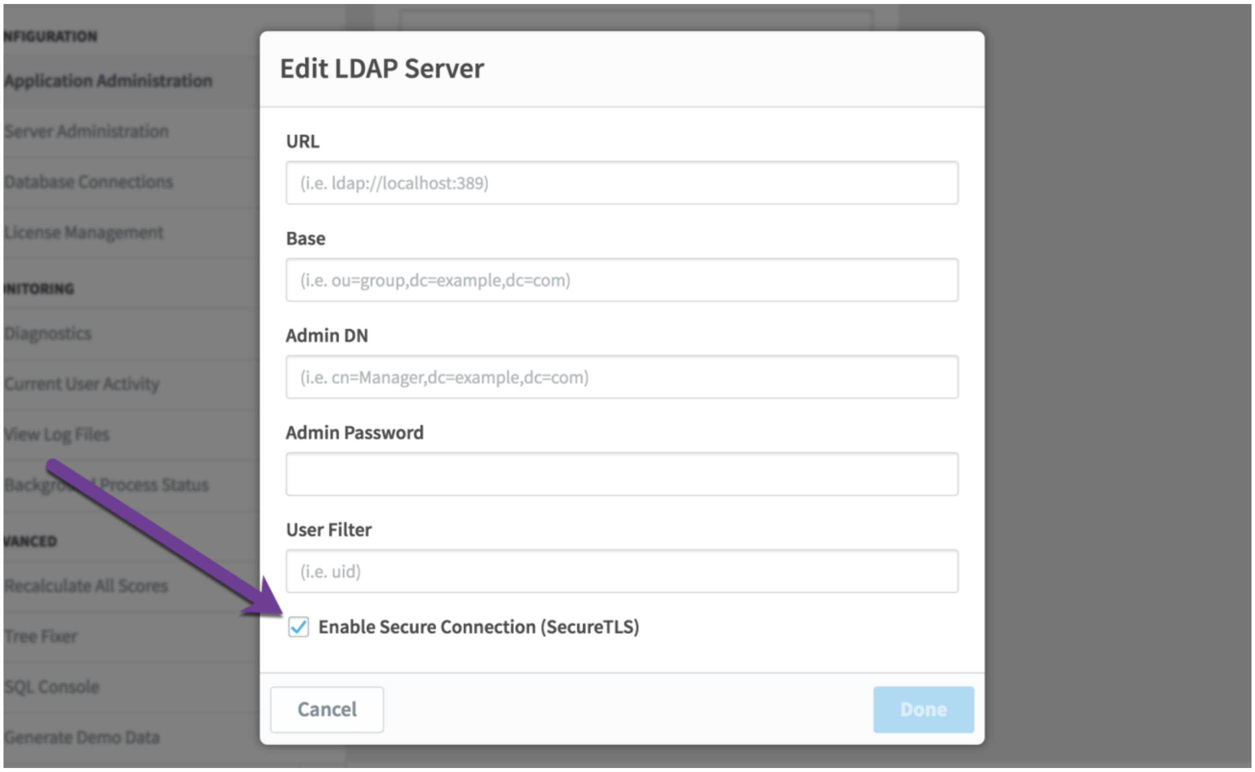


Here’s what the login screen looks like.



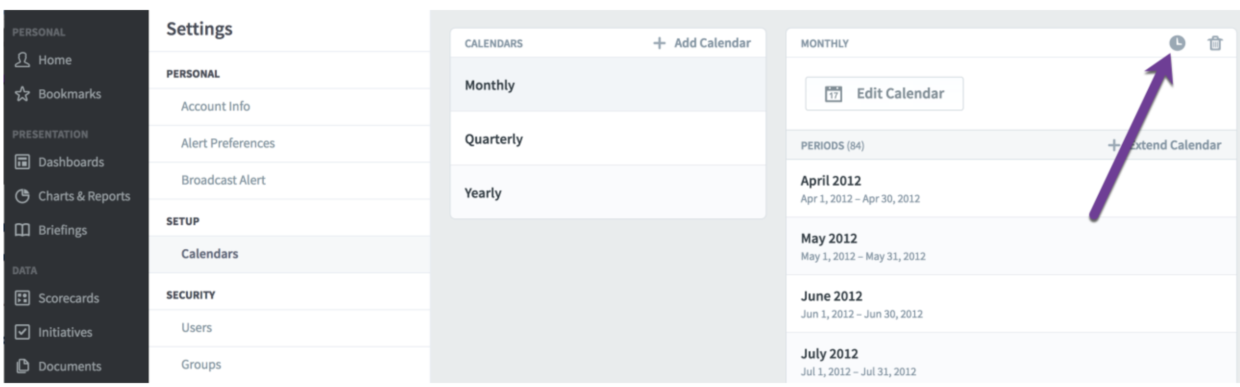
Authenticating with encrypted LDAP

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.

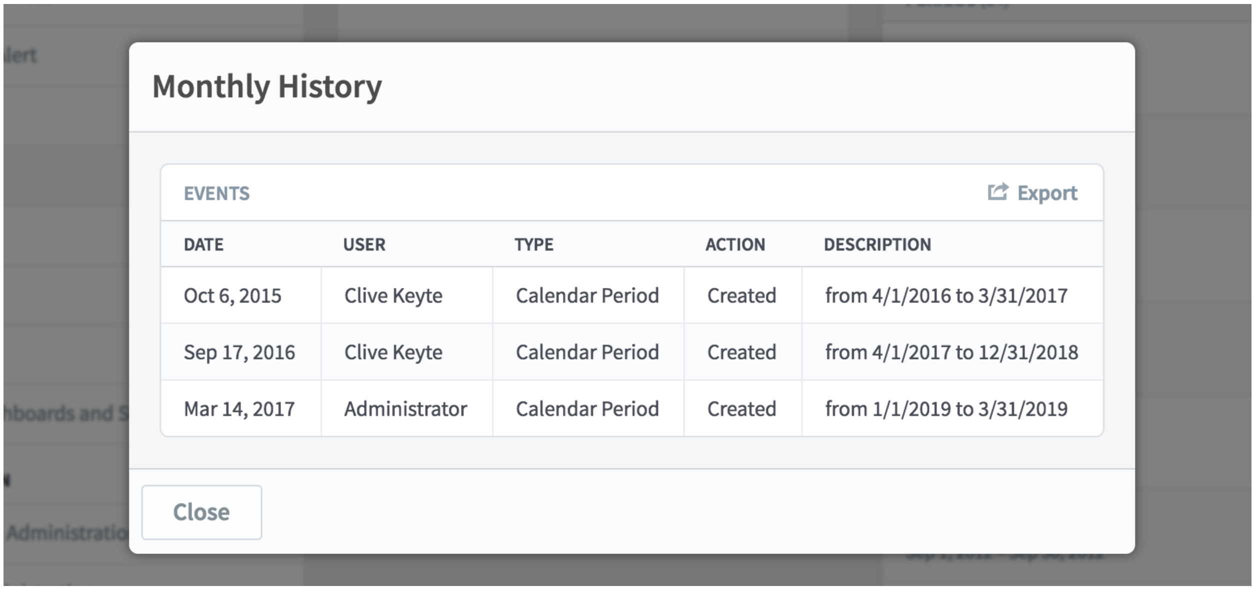


Viewing calendar history

There's now a history button in Administration Calendars.



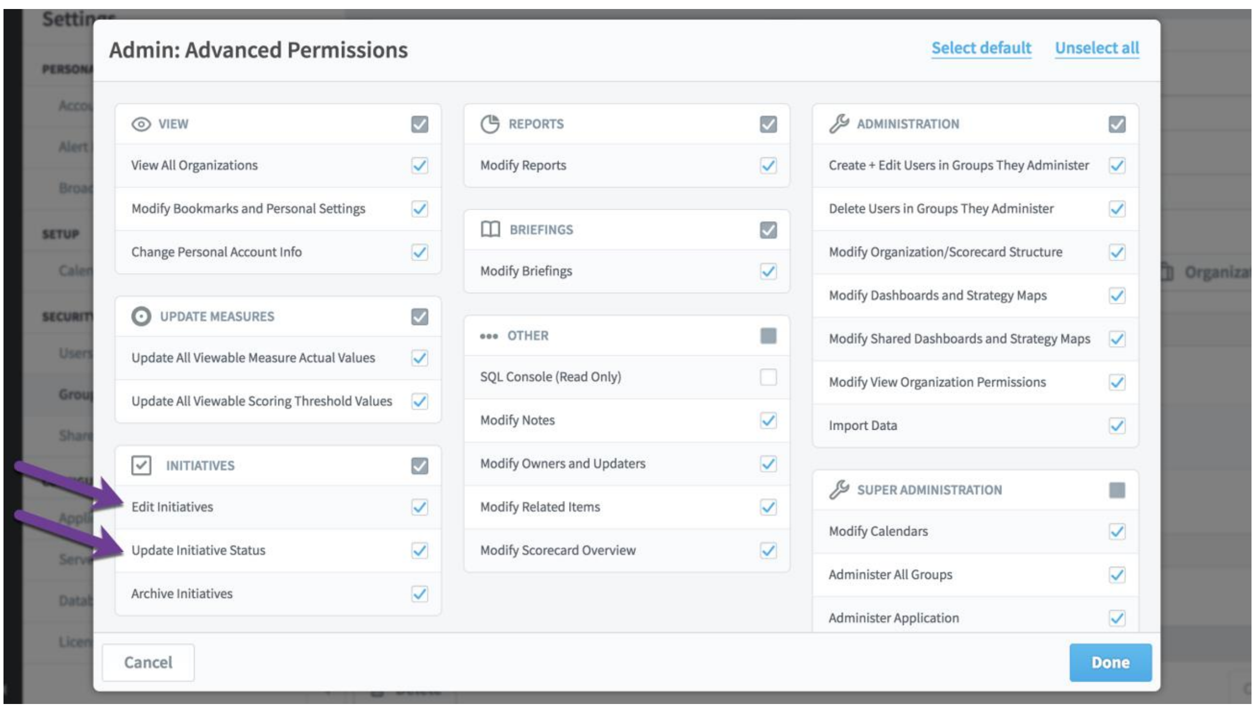
When you click it, you'll see all of the changes that have been made to the currently selected calendar.



DATE	USER	TYPE	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
Mar 14, 2017	Administrator	Calendar Period	Created	from 1/1/2019 to 3/31/2019

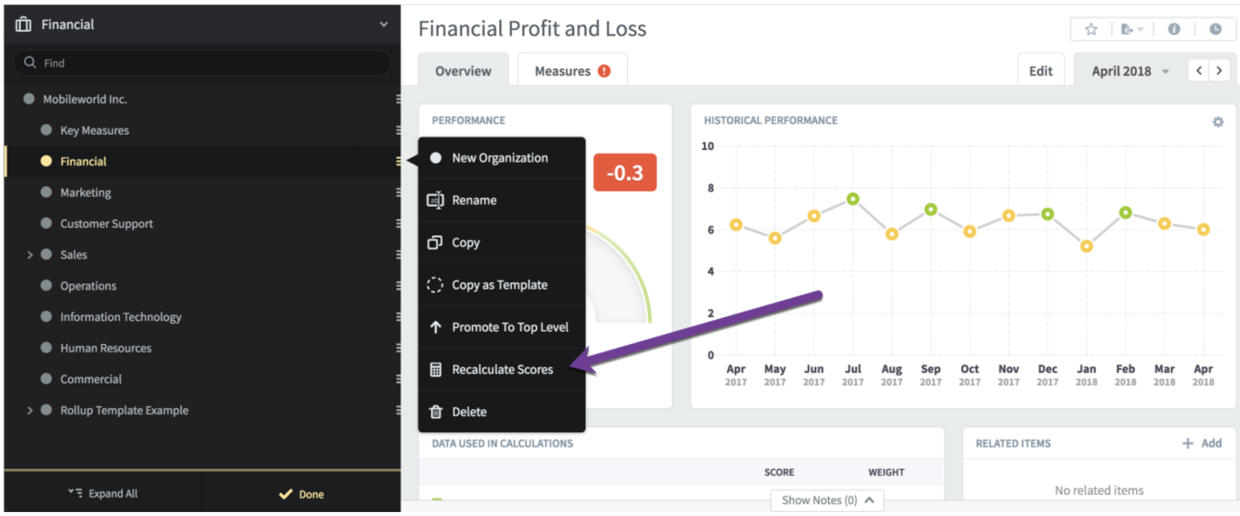
Setting separate "edit" and "update" initiative permissions

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.

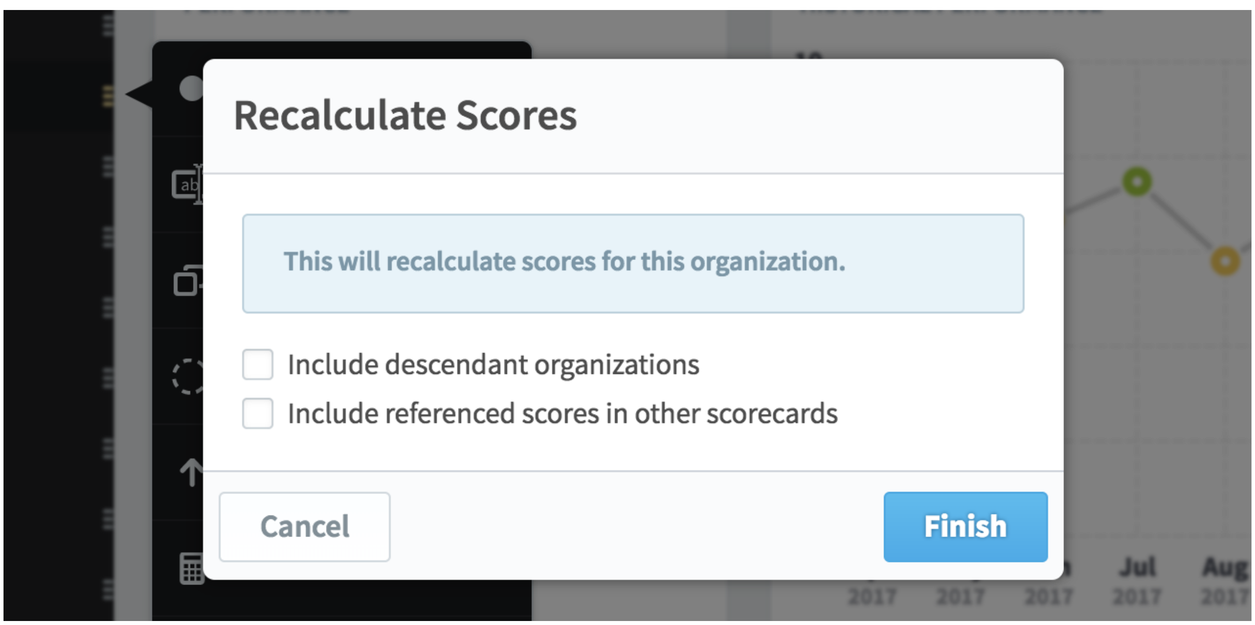


Forcing score recalculations

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.”

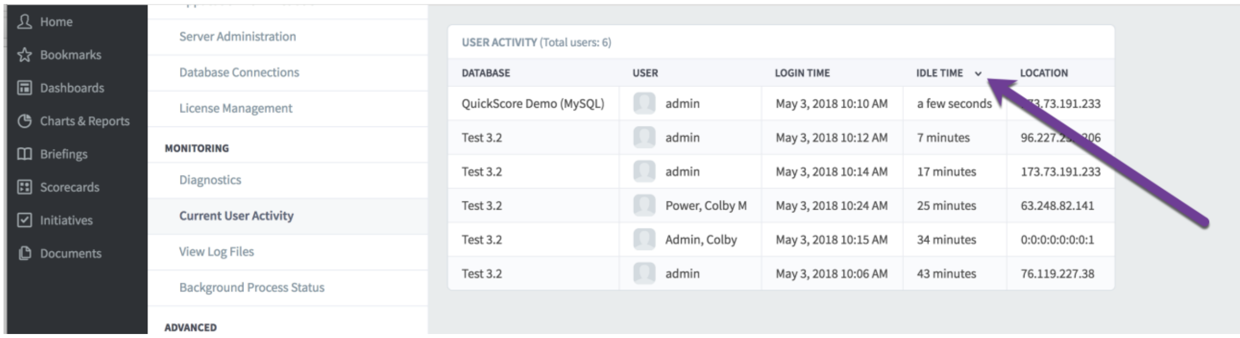


This opens the recalculate scores dialog. You can choose to include all descendant organizations, as well as whether to include referenced scores in other scorecards.



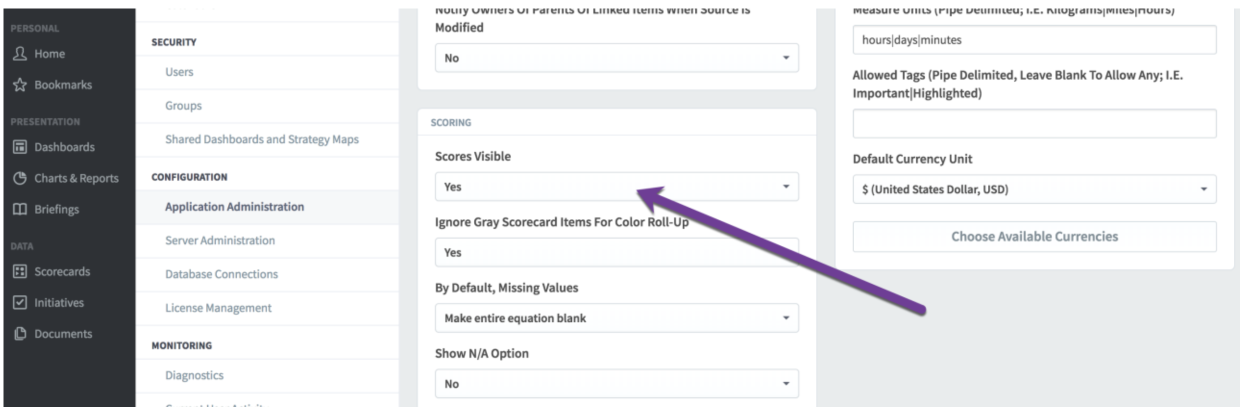
Sorting current user activity

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



Hiding scores

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

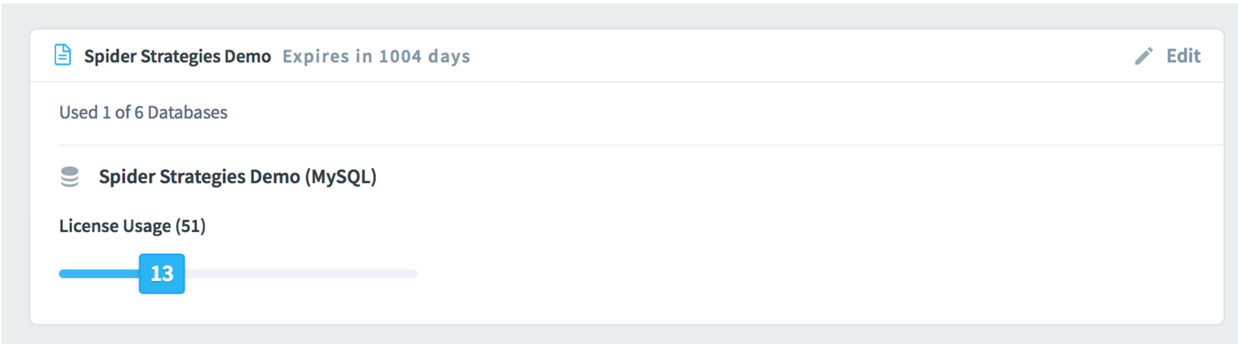


This will prevent scores from appearing in most places in QuickScore.

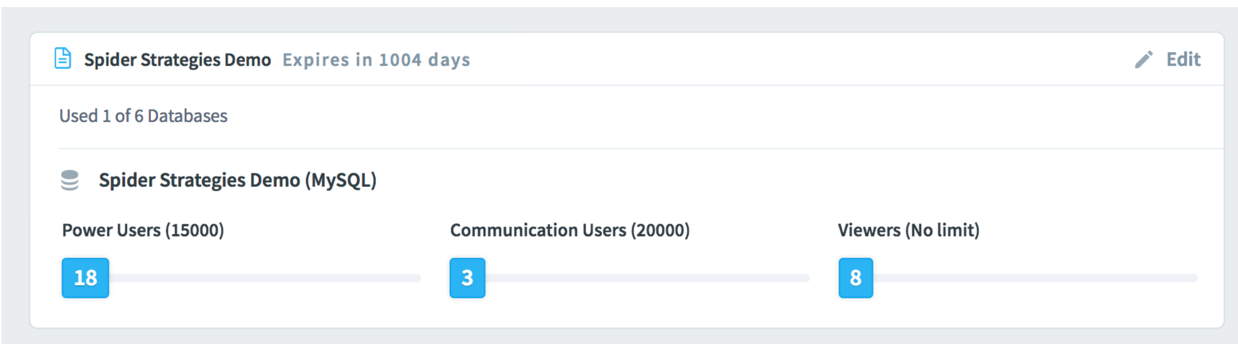
There are still a few places where scoring cannot be avoided, though, like graphing the performance of a non-measure scorecard item.

Displaying licensing information

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



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



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.