

bambooBSC 0.7

Manual de Usuario bambooBSC

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Código del proyecto: <https://github.com/Multisistemas/bsc>

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Introducción

bambooBSC es una plataforma de código abierto para gestión de Balanced Scorecard (BSC), provee análisis del desempeño a nivel de usuario, departamento y toda la organización.

Funciones clave:

Sourcecard:

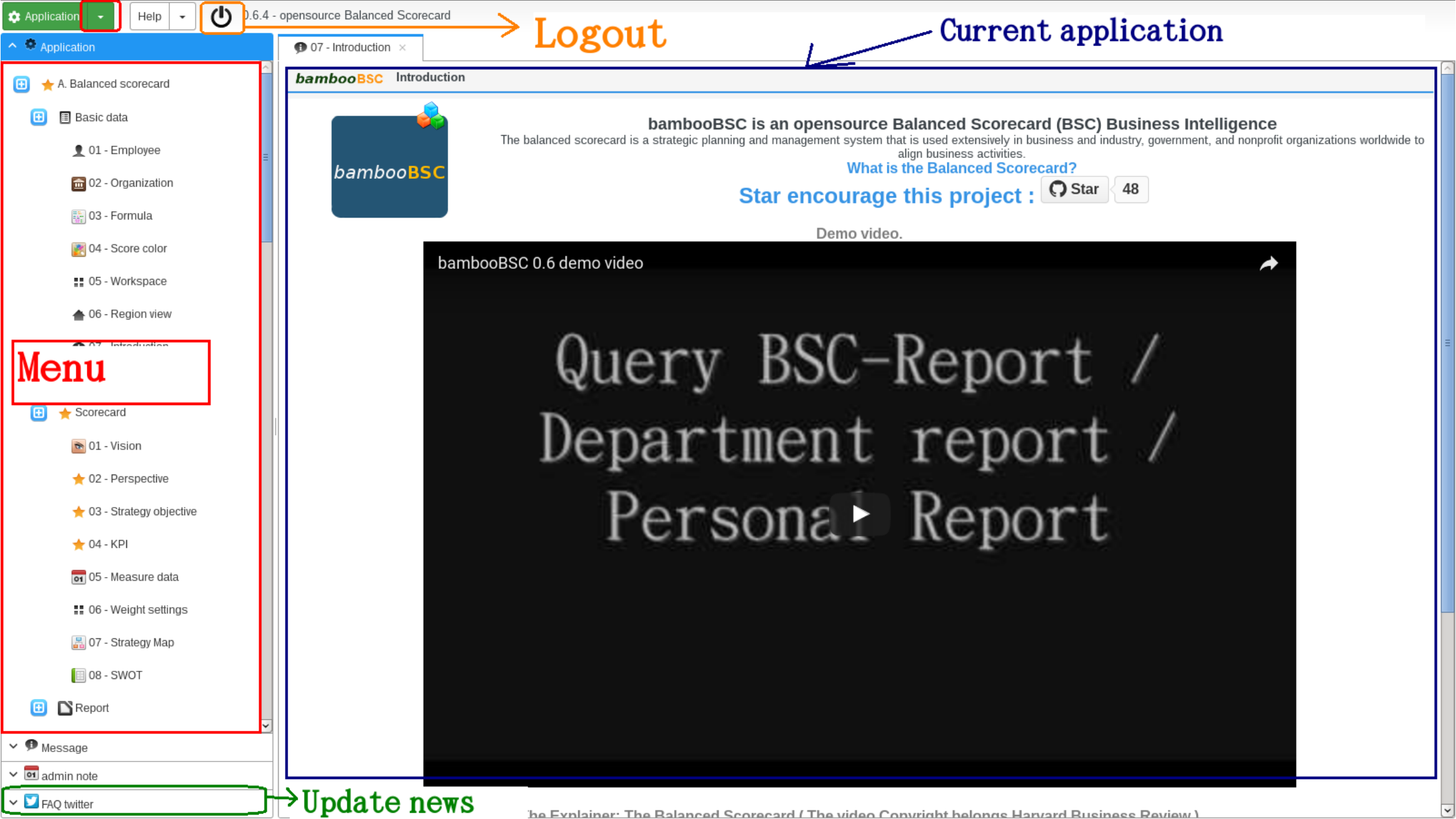
Tarjeta de origen: Establecer y mantener la información de las tarjetas de origen y mantenimiento de los datos de medición de los KPI y el Mapa Estratégico.

Reportes:

Los reportes incluyen: Reportes de KPI, Reportes de Tarjetas por departamento/organización, reportes de tarjetas personales, reportes FODA y PHVA.

Operaciones básicas

Ver figura-A.



Pasos para establecer el Scorecard

¿Cómo establecer los datos del Scorecard?, Videos de referencia: <https://www.youtube.com/watch?v=N5BsWZL8bxQ>

1. Establecer una Visión

Completar objetivos propuestos y visión.

2. Establecer Perspectivas

Establecer las cuatro perspectivas BSC, información de referencia acerca de las perspectivas BSC: http://en.wikipedia.org/wiki/Balanced_scorecard

Las perspectivas deben ser definidas y aceptas por los responsables de cumplirlas en cada área de la organización, de lo contrario se consideran inválidas.

3. Establecer Objetivos Estratégicos

Cada conjunto de objetivos debe estar asociado con una perspectiva.

El objetivo principal de los objetivos estratégicos es definir una dirección narrativa.

4. Establecer KPI (Key Performance Indicators)

El establecimiento de indicadores clave desempeño (KPI), son actividades más concretas y detalladas que contribuyen a lograr los objetivos estratégicos.

5. Mantener actualizados los datos de medición.

Cada elemento de un KPI necesita mantener sus datos actualizados, si esta información no es actualizada, no se podrá calcular el desempeño de los KPI.

1. Visión

Primero hacer click en la opción de menú “ 01 – Vision “. Ver figura 1-01, 1-02

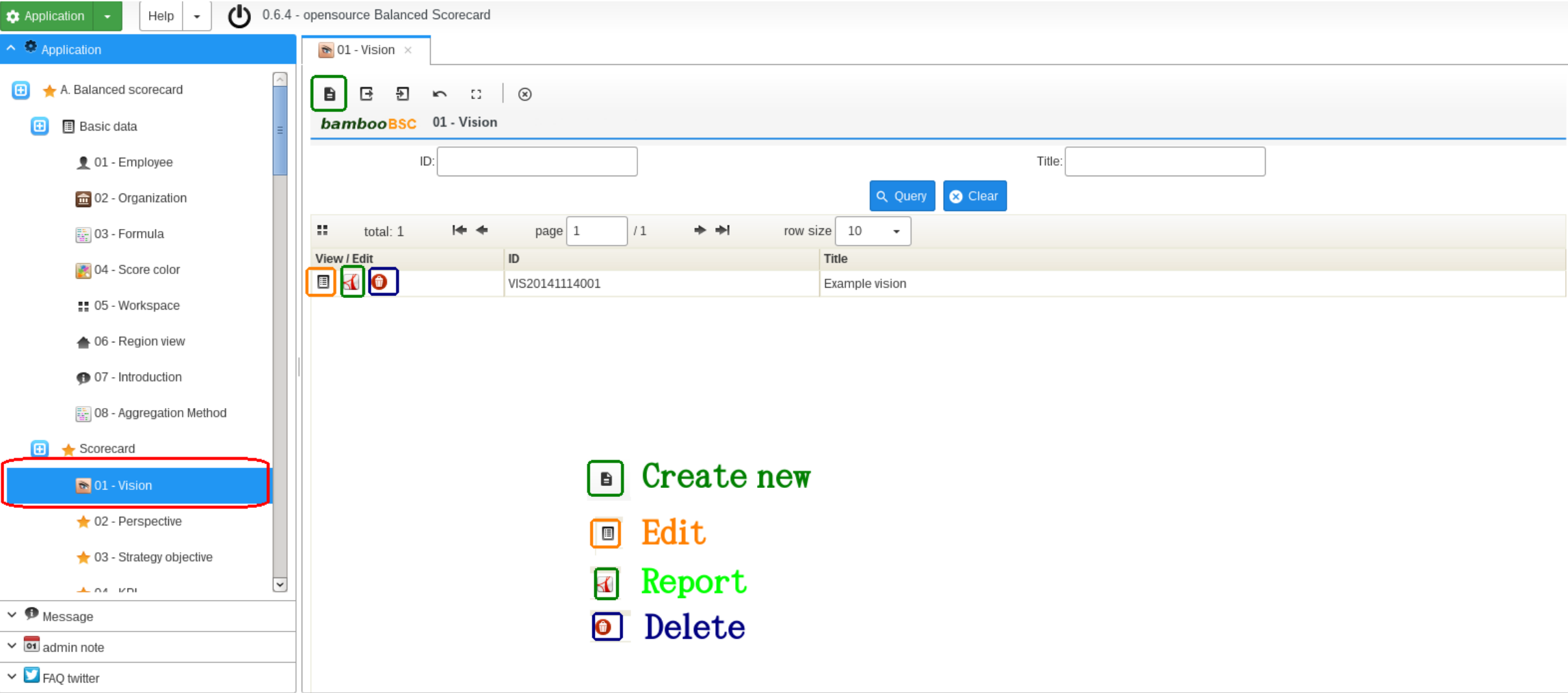


figura 1-01

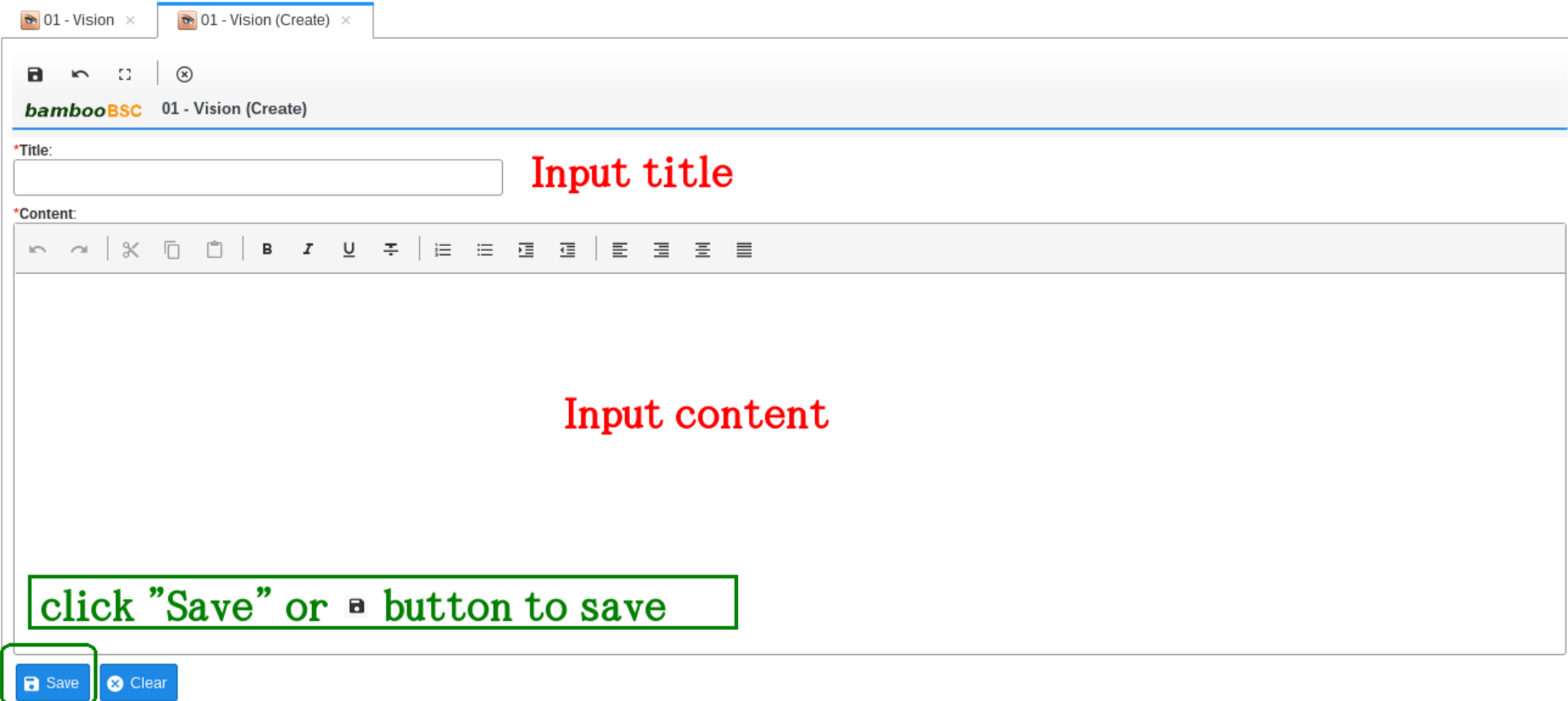


figura 1-02

2. Perspectivas

Hacer click en la opción “ 02 – Perspective “. Ver figura 2-01 , 2-02

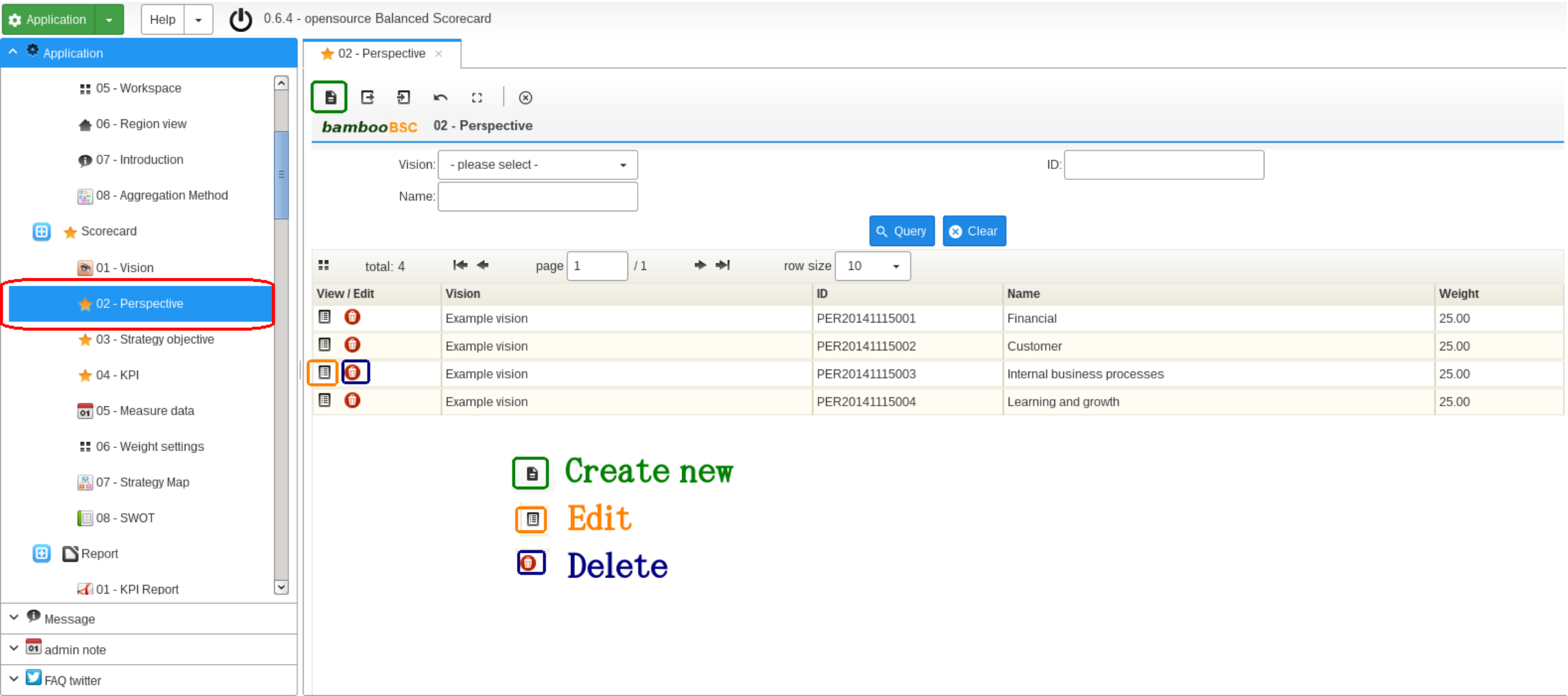


figura 2-01

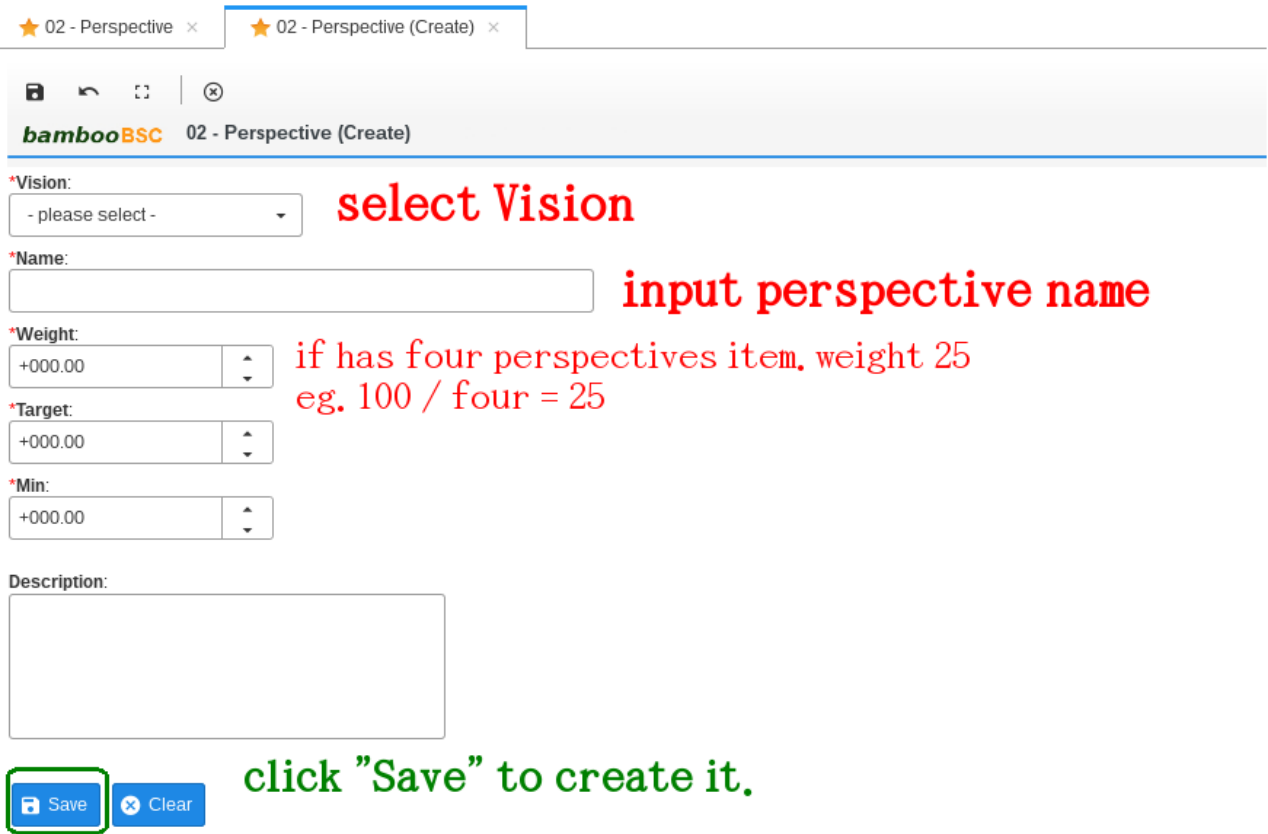


figure 2-02

3. Objetivos estratégicos

Hacer click en la opción “ 03 – Strategy objective “. Ver figura 3-01, 3-02

Application

Application

Scorecard

01 - Vision

02 - Perspective

03 - Strategy objective

04 - KPI

05 - Measure data

06 - Weight settings

07 - Strategy Map

08 - SWOT

Report

01 - KPI Report

02 - Personal Report

03 - Department Report

04 - Perspectives Dashboard

05 - Objectives Dashboard

Message

admin note

FAQ twitter

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03 - Strategy objective

bambooBSC

03 - Strategy objective

Vision: - please select -

Perspective: - please select -

ID:

Name:











Query

Clear

total: 5

page 1 / 1

row size 10

View / Edit	Vision	Perspective	ID	Name	Weight
 	Example vision	Financial	OBJ20141117001	Enhance turnover	50.00
 	Example vision	Financial	OBJ20141127001	Investment	50.00
 	Example vision	Customer	OBJ20141127002	Increase customer	100.00
 	Example vision	Internal business processes	OBJ20141127003	Upgrade organization	100.00
 	Example vision	Learning and growth	OBJ20141127004	Capacity building objectives	100.00

Create new

Edit

Delete

figura 3-01

★ 03 - Strategy objective × ★ 03 - Strategy objective (Create) ×

bambooBSC 03 - Strategy objective (Create)

*Vision: **select Vision**

*Perspective: **select Perspective**

*Name: **input Objective item name**

*Weight:

*Target:

*Min:

Description:

click "Save" to create.

figura 3-02

click "Save" to create.

4. KPI (Indicadores Clave de Desempeño)

Hacer click en “ 04 – KPI “. Ver figura 4-01, 4-02

Application

Help

0.6.4 - opensource Balanced Scorecard

Application

Scorecard

01 - Vision

02 - Perspective

03 - Strategy objective

04 - KPI

05 - Measure data

06 - Weight settings

07 - Strategy Map

08 - SWOT

Report

01 - KPI Report

02 - Personal Report

03 - Department Report

04 - Perspectives Dashboard

05 - Objectives Dashboard

Message

admin note

FAQ twitter

04 - KPI

bambooBSC

04 - KPI

Vision: - please select -

Perspective: - please select -

Objective: - please select -

ID:

Name: Sales

Query

Clear

total: 1

page 1 / 1

row size 10

View / Edit	Vision	Perspective	Objective	ID	Name	Weight	Description
<div><div></div><div></div></div>	Example vision	Financial	Enhance turnover	KPI0001	Sales	100.00	aa bb

Create new KPI

Edit

Delete

figura 4-01

★ 04 - KPI ×

★ 04 - KPI (Create) ×

bambooBSC

04 - KPI (Create)

*Vision:

- please select -

*Perspective:

- please select -

*Objective:

- please select -

*Weight:

+000.00

▲

▼

*Maximum:

+000.00

▲

▼

*Target:

+000.00

▲

▼

*Compare type:

- please select -

*Belong type:

- please select -

Department:

Employee:

Organization measure-data separate:

Personal measure-data separate:

Activate options:

Description:

Documents / attachment:

Save

Clear

*ID:

*Name:

*Formula:

- please select -

*Management method:

- please select -

for quasi is better:

0%

▼

*Calculation (aggregation method):

- please select -

*Minimum:

+000.00

▲

▼

*Unit:

*Trends formula:

- please select -

figura 4-02

Visión: Seleccionar visión del KPI.

Perspectiva: Seleccionar perspectiva del KPI

Objetivo: Seleccionar objetivo del KPI

Id: identificador del KPI.

Name: Nombre del KPI

Formula: Fórmula del KPI, Afectará al cálculo de las puntuaciones, Para crear o editar fórmulas ir a “Basic data / **03 – Formula**”

Fórmula de tendencias: Solo es necesaria para calcular las puntuaciones el reporte **07 - KPI Period Trends report**.

Peso: Debe ser mayor que CERO. Si se establece a CERO no tiene sentido.

Máximo: Valor máximo, Debe ser un valor mayor al ingresado en el campo meta.

Meta: Valor meta.

Mínimo: Valor mínimo.

Tipo de comparación: Con meta (las puntuaciones KPI se comparan con el valor meta) , con mínimo (las puntuaciones KPI se comparan con el valor mínimo)

Unidad: Unidad del KPI (por ejemplo: %, USD, TWD, millon, pieza, etc.)

Método de gestión: Mayor(puntuación mayor es mejor) / Menor (Puntuación menor es mejor) / Casi(puntuación casi es mejor)

Cálculo (método de agregación): Promedio, Total, Max, Min, se define en **08 – Método de agregación** (Afectará el cálculo de las puntuaciones)

Ejemplos de KPI que tienen DOS datos de medición y su Cálculo es Promedio

A. 2014 dato de medición es 50

B. 2015 dato de medición es 80

rango 2014 ~ 2015

Puntuación promedio = (50 + 80) / 2 = 65

Pertenencia (Belong tipo): Se recomienda seleccionar “**Both**”

Department: click open pop-window to select (figure 4-03)

click clear select value

Employee: click open pop-window to select (figure 4-04)

click clear select value

Calcular puntuaciones de organización por separados (Organización métricas datos separados): Se recomienda chequeado / habilitado.

Calcular puntuaciones personales por separado (personales métricas datos separados): Se recomienda chequeado / habilitado.

Activar opciones: Se recomienda chequeado / habilitado, Se se deshabilita, el KPI no aparecerá en los reportes.

Descripción: Descripción del KPI

Documentos / adjuntos: Se pueden subir archivos adjuntos.

Selección de departamento

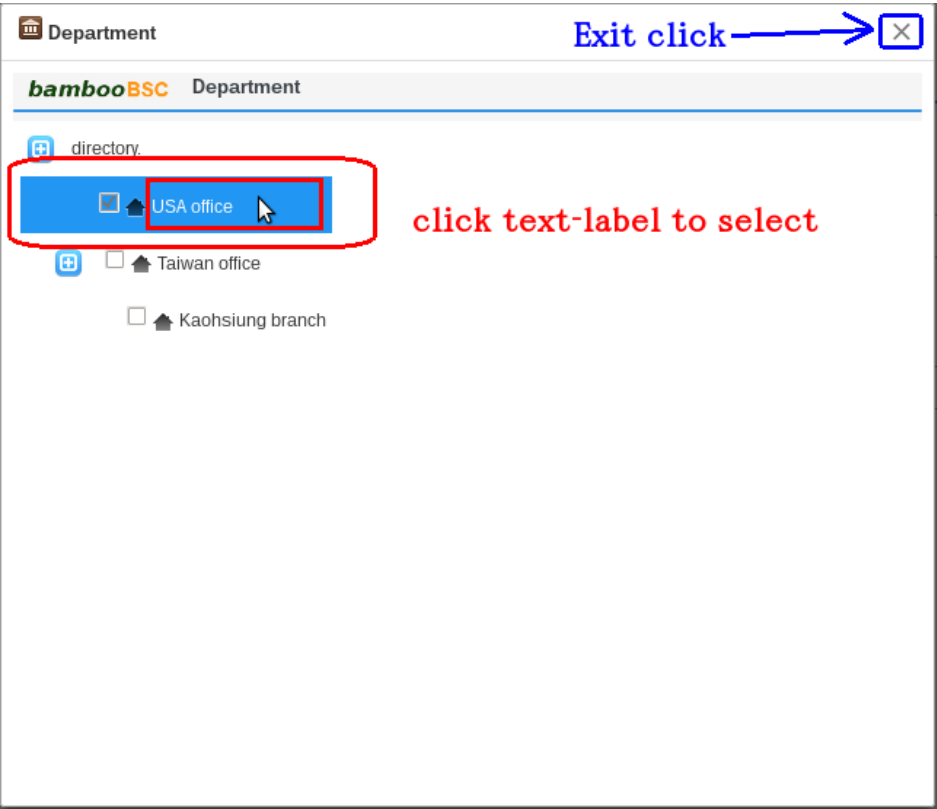


Figura 4-03

Selección de empleado

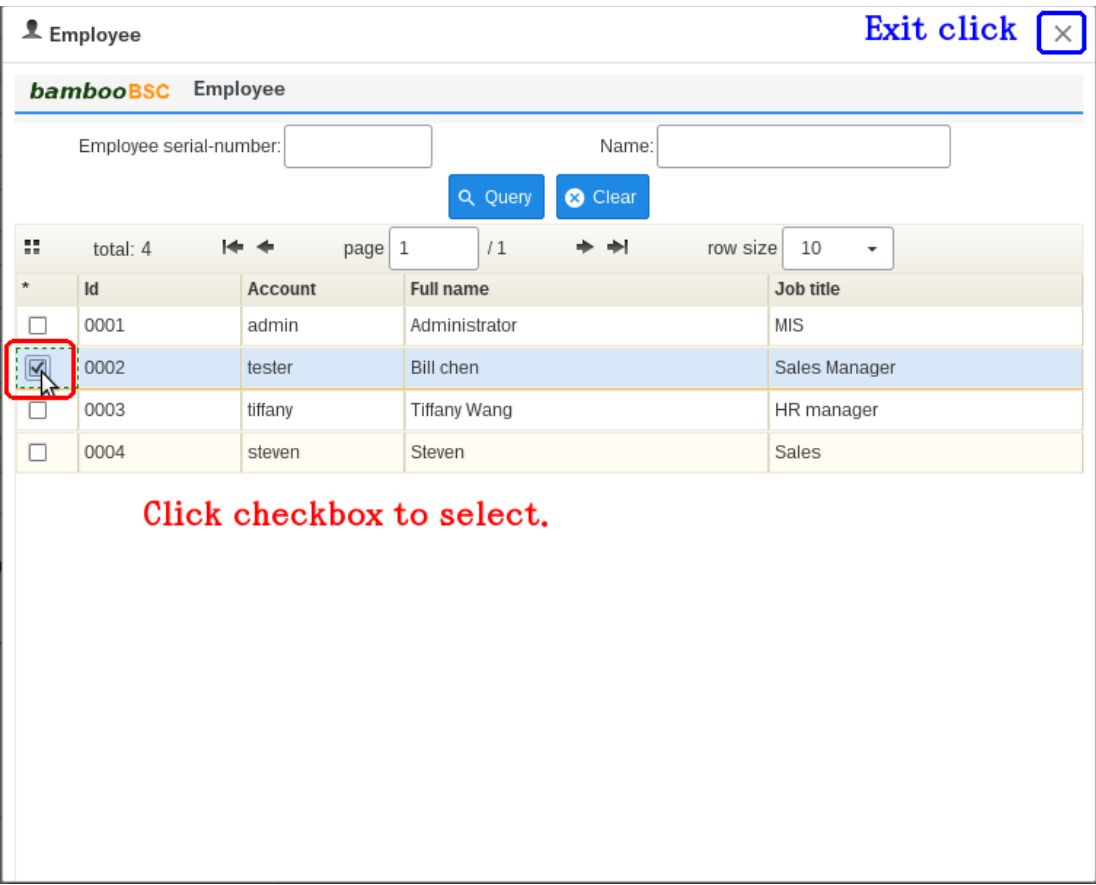


figure 4-04

5. Datos de medición

Estos datos necesitan actualizaciones frecuentes y mantenimiento, Si no se ingresan datos para poder calcular los KPI, los KPI mostrados en los reportes no tendrán sentido.

Hacer click “ 05 – Datos de medida” . Ver figura 5-01

- 1. Seleccionar un elemento **KPI**
- 2. Seleccionar las opciones y hacer click en **Consulta**
- 3. Ingresar los datos de medición, hacer click en **Guardar** para actualizar.

Application

Help

0.6.4 - opensource Balanced Scorecard

Application

Scorecard

01 - Vision

02 - Perspective

03 - Strategy objective

04 - KPI

05 - Measure data

06 - Weight settings

07 - Strategy Map

08 - SWOT

Report

01 - KPI Report

02 - Personal Report

03 - Department Report

04 - Perspectives Dashboard

05 - Objectives Dashboard

06 - KPIs Dashboard

07 - KPI Period Trends

Settings

01 - Report property

02 - Workspace settings

Message

admin note

FAQ twitter

05 - Measure data

KPIs menu

KPIs

Example vision

Financial

Enhance turnover

Sales

Investment

Stock market investment f

Investment projects in dev

Customer

Increase customer

Expanding Asia-Pacific m

Internal business processes

Upgrade organization

Loss stronghold transforr

Learning and growth

Capacity building objectives

Education and Training

Options

Measure-data for: All

Frequency: Year

Organization: - please select -

Employee: - please select -

Query

Clear

Save

Sales

Management:Bigger is better, Calculation:Average, Unit:%, Target:50, Min:10

Formula name:F001 percent of target

2016

Year

T: 100

A: 57

T (Target value) , A (Actual value)

1. click KPI tree label to select an item.

2. setting options and click "Query"

3. input measure-data field value, click "Save" to update

Prev measure-data

Next measure-data

figura 5-01

6. KPI Report

Query organization/Department or Employee 's performance score . first click Report “ 01 – KPI Report ” look figure 6-01

01 - KPI Report

bambooBSC

01 - KPI Report

Options

Vision:

- please select -

Measure data frequency:

Year

Measure data start year:

end year:

Measure data start date:

end date:

Measure data type for:

All

Organization:

- please select -

Employee:

- please select -

figure 6-01

ICON	Description
<div></div>	Query report content
<div></div>	Export query report as PNG image, (used IE browser the function failure)
<div></div>	Export query report as PDF file, (used IE browser the function failure)
<div></div>	Export query report as Excel file, (used IE browser the function failure)
<div>Vision: - please select -</div>	Select an Vision
<div>Measure data frequency: Year</div>	Select frequency
<div>start year: end year:</div>	If Frequency is “ Year” , “ Half of year ” , “ Quarter ” , must input start year and end year
<div>start date: end date:</div>	If Frequency is “ Month” , “ Week ” , “ Day “ , must input start day and end day
<div>Measure data for: All</div>	All: Measure data type is non-departmental and non-employee class Organization: Measure data type only for an organization/Department Employee: Measure data type only for an employee
<div>organization: - please select -</div>	If measure data for organization type. Need select the option
<div>employee: - please select -</div>	If measure data for employee type. Need select the option

7. Personal Report

Query employee's BSC report. first click Report “ 02 – Personal Report ” look figure 7-01

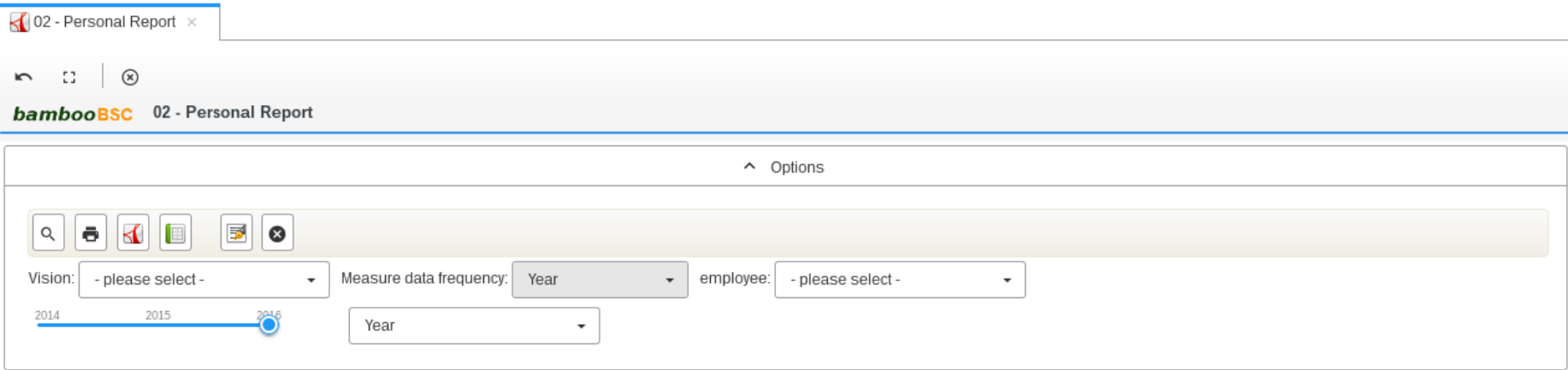


figure 7-01

ICON	Description
	Query report content
	Export query report as PNG image, (used IE browser the function failure)
	Export query report as PDF file, (used IE browser the function failure)
	Export query report as Excel file, (used IE browser the function failure)
Vision: <input type="text" value="- please select -"/>	Select an Vision
Measure data frequency: <input type="text" value="Half of year"/>	No need select, system auto settings.
employee: <input type="text" value="- please select -"/>	Select an employee
	Select report year.
<input type="text" value="In the first half"/>	In the first half: measure-data frequency basic of first half In the second half: measure-data frequency basic of second half Year: measure-data frequency basic of Year

8. Department Report

Query organization/Department BSC report. first click Report “ 03 – Department Report ” look figure 8-01

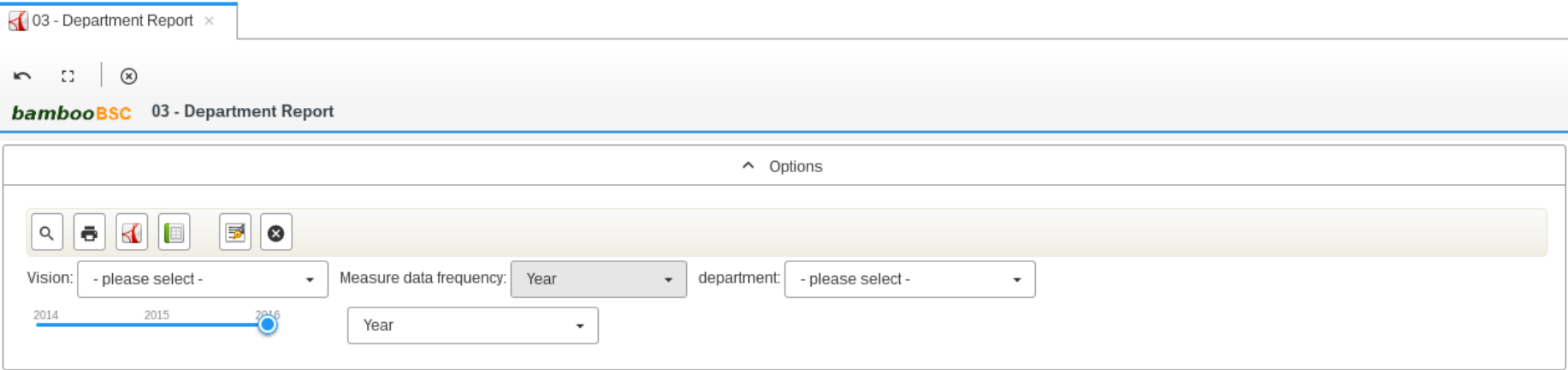


figure 08-001

ICON	Description
	Query report content
	Export query report as PNG image, (used IE browser the function failure)
	Export query report as PDF file, (used IE browser the function failure)
	Export query report as Excel file, (used IE browser the function failure)
Vision: <input type="text" value="- please select -"/>	Select an Vision
Measure data frequency: <input type="text" value="Half of year"/>	No need select, system auto settings.
department: <input type="text" value="- please select -"/>	Select an organization/Department
	Select report year.
<input type="text" value="In the first half"/>	In the first half: measure-data frequency basic of first half In the second half: measure-data frequency basic of second half Year: measure-data frequency basic of Year

9. Strategy Map

Query or edit the strategy map. First click “ 07 – Strategy Map ” look figure 9-01

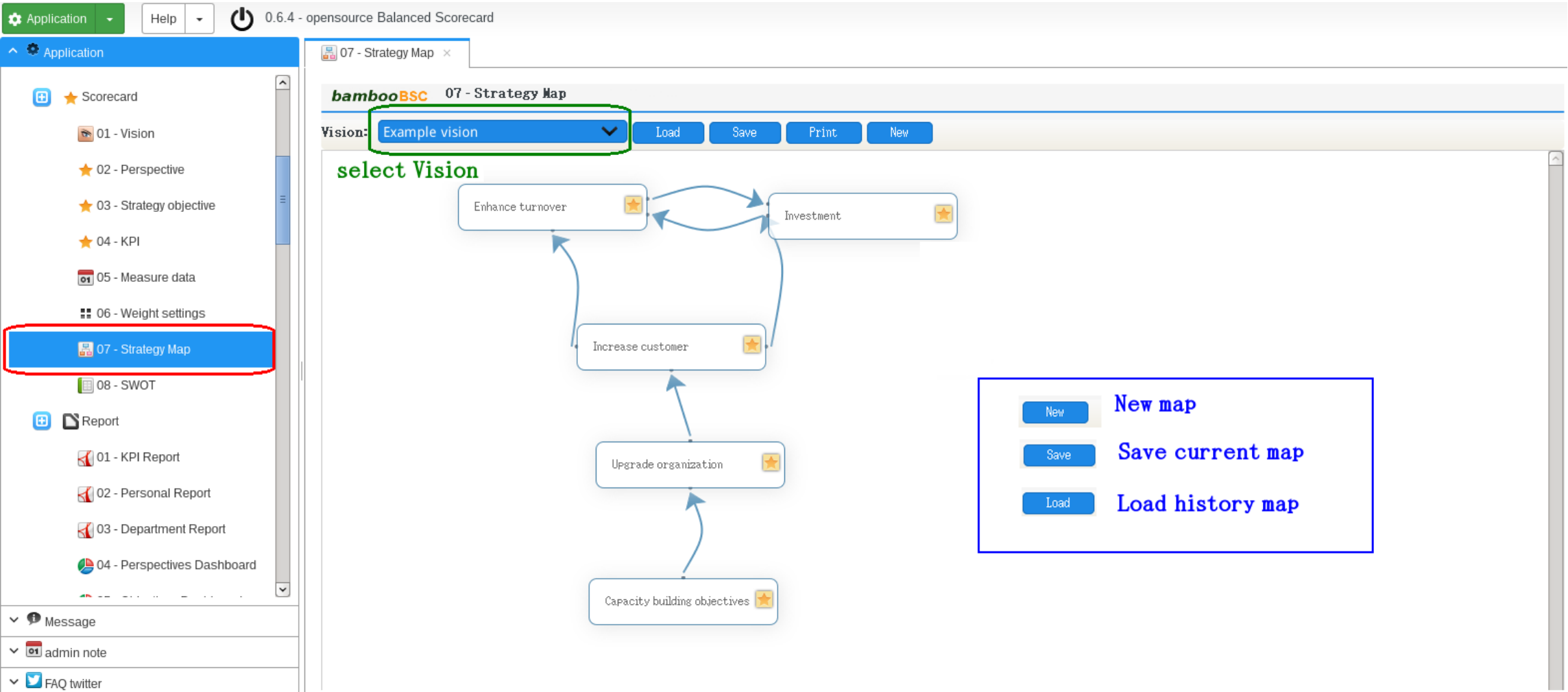
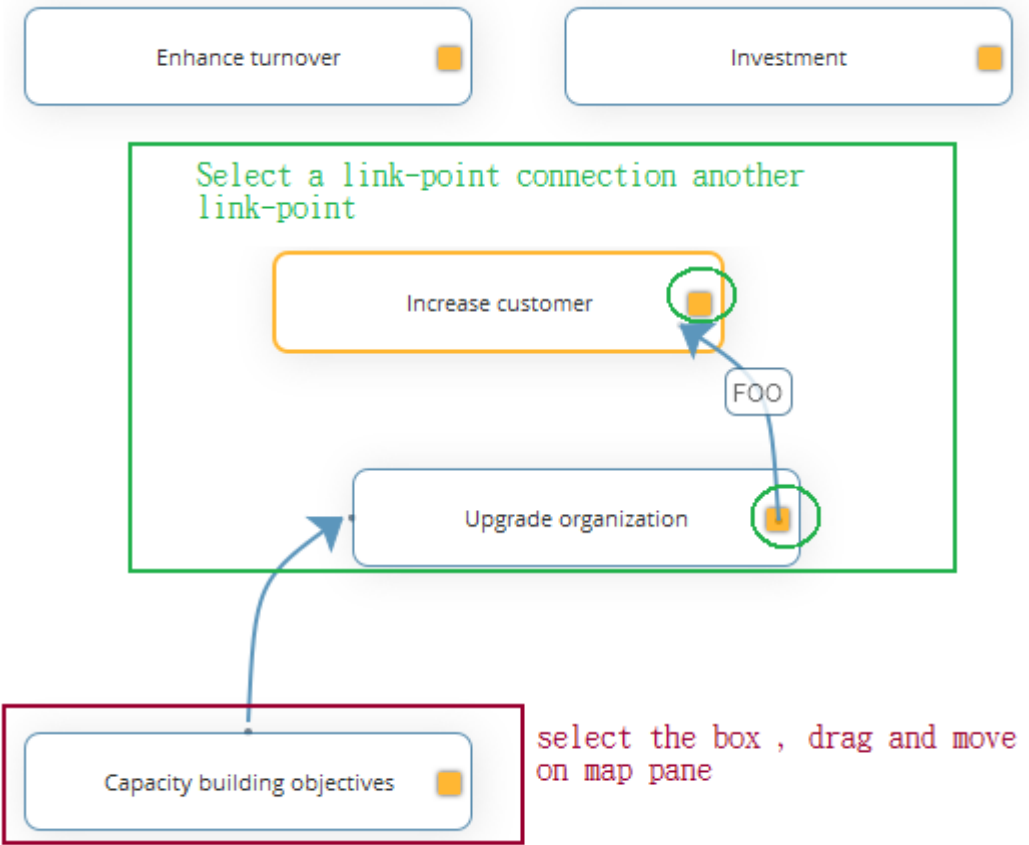
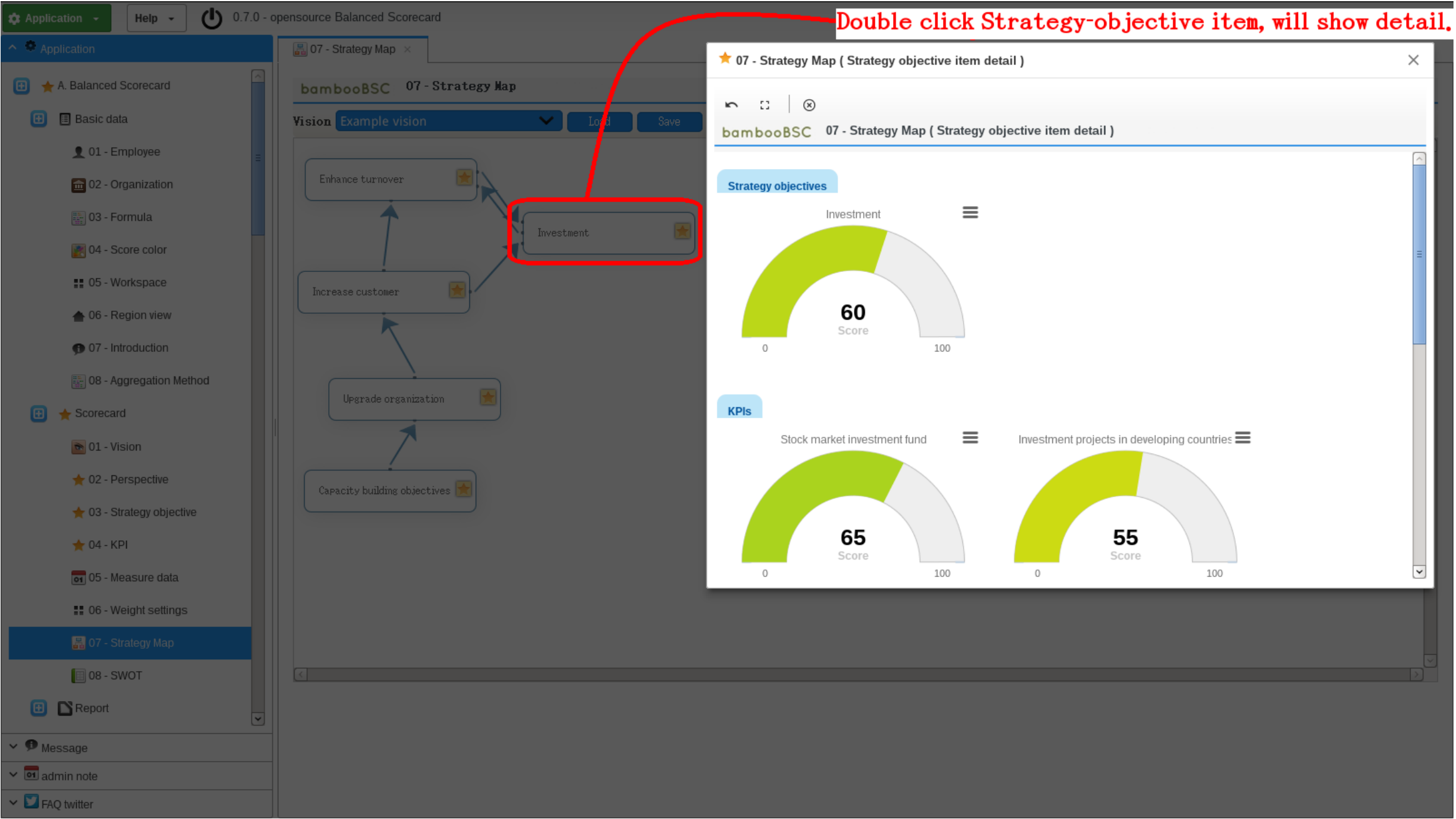


figure 9-01

How to drag Line on MAP



9. Strategy MAP Double click Strategy-objective item , will show detail



10. SWOT

Query or edit BSC S.W.O.T. first click “ 08 – SWOT ” look figure 10-01

- 1. first select an Vision and department/Organization
- 2. Query
- 3. input content on text-box
- 4. click save

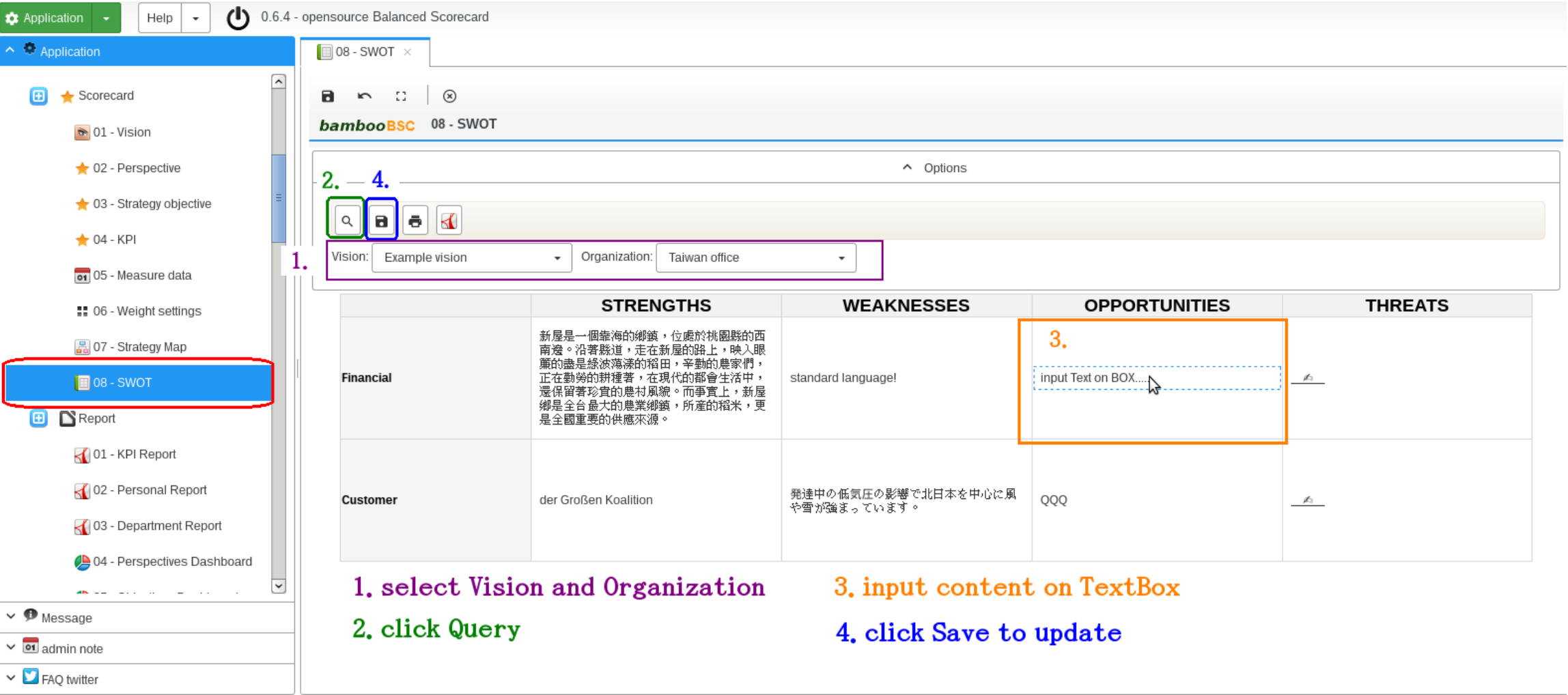




figure 10-01

ICON	Description
	Query content
	Save content
	Export query report as PNG image, (used IE browser the function failure)
	Export query report as PDF file, (used IE browser the function failure)
Vision: <input type="text" value="- please select -"/>	Select an Vision
Organization: <input type="text" value="Taiwan office"/>	Select an department/Organization

11. Report signature

Managers signature on the report for “01 – KPI Report” / “02 – Personal Report” / “03 – Department Report” . Only export **Excel** or **PDF** found signature picture.

ICON	Description
	Open signature pop-window.
	Clear current signature picture.

1. first click 

2. drawing name on signature pop-window . Look figure 11-01

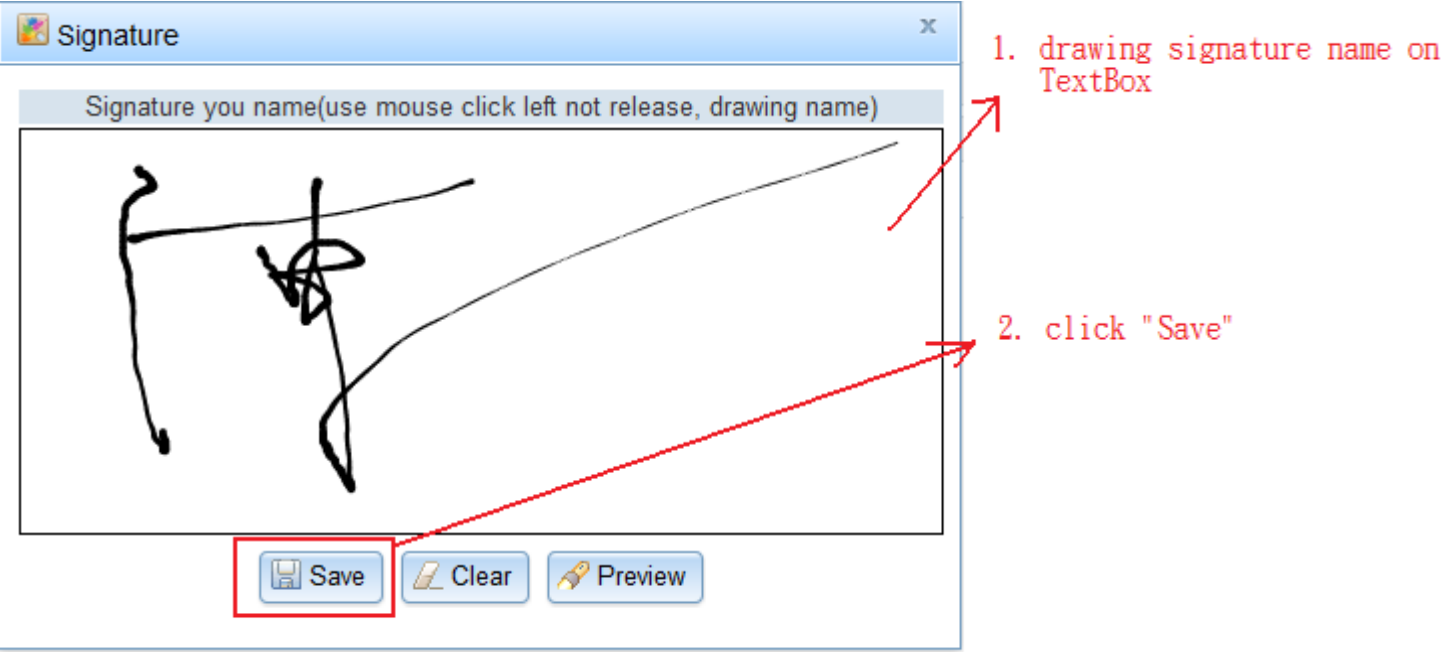


figure 11-01

3. click export PDF or Excel button , result look figure 11-02

4332bf59-016a-49aa-8005-19e0721ad520.xlsx - LibreOffice Calc

檔案(F) 編輯(E) 檢視(V) 插入(I) 格式(O) 工具(T) 資料(D) 視窗(W) 說明(H)

微軟正黑體 10

A47


	A	B	C	D	E	F	G
34	Frequency: Year Date range: 2013/01/01 ~ 2015/12/31						
35	Sales		2013	2014	2015		
36			↓0	↑64	↑55		
37	Stock market investment fund		2013	2014	2015		
38			↓0	↓75	↓63		
39	Investment projects in developing countries		2013	2014	2015		
40			↓0	↓71	↓48		
41	Expanding Asia-Pacific market		2013	2014	2015		
42			↓0	↓81	↓66		
43	Loss stronghold transformation		2013	2014	2015		
44			↓0	↓90	↓70		
45	Education and Training		2013	2014	2015		
46			↓0	↓97	↓81		
47							
48							
49							
50							
51							
52							
53							
54							
55							
56							
57							

figure 11-02

12. Query Charts

The main function is SQL query to chart .

12-1. Settings datasource

please use “01 – Data source config” to create or modify Datasource settings.
If you want to provide other DB connection driver(SQL-Server or Oracle, pqSQL ...), please put Driver LIB jar file to WEB-INF/lib and add config of table named qc_data_source_driver . **Currently, the system only provides MySQL Driver** .

12-2. Settings data mapped

Settings Charts's Label and Value mapped. Click “02 – Data query mapper” on menu . Create new items please look (figure 12-01)

02 - Data query mapper (Edit)

ID: QCHARTS_PROG001D0002E

*Name: KPIs actual mapper - 01

description:

for example!

Mapper Label:

Mapper Value:

add

#	Label Field	Value Field
✖	NAME	ACTUAL
✖	NAME	TARGET

Save

Clear






figure 12 - 01

- Name:** Please input mapped item name.
- Description:** memo or explain
- Mapper Label:** sql query's fields name
- Mapper Value:** sql query's fields name

12-3. Query expression to Charts

Charts have provided BAR, PIE, LINE, AREA and html table. Click “01 – Basic query” on menu tree. Look (figure 12-02) , Example results Look (figure 12-03)

Options



Save query

Clear

Delete

History: KPIs 2015 year Actual value.

Datasource: BBCORE01 - datasource-01

Name: KPIs 2015 year Actual value.






Mapper: KPIs actual mapper - 01

Mapper items(for Pie charts): - please select -

Query expression:

select K.NAME, MD.ACTUAL, MD.TARGET, MD.DATE from bb_measure_data MD, bb_KPI K
where K.ID=MD.KPI_ID and MD.FREQUENCY='6' and MD.ORG_ID='*' and MD.EMP_ID='*'
and MD.DATE LIKE '2015%'

figure – 12-02

ICON	Description
	Query results show as HTML table.
	Query results show as Pie charts
	Query results show as Bar charts
	As Line charts
	As Area charts
<div>Save query</div>	Save query expression to history data.
<div>Clear</div>	Clear
<div>Delete</div>	Delete history data.
History: KPIs 2015 year Actual value.	Select history data.
Datasource: BBCORE01 - datasource-01	Select datasource.
Name: KPIs 2015 year Actual value.	input query name when need Save query
Mapper: KPIs actual mapper - 01	Select mapped item for query Charts
Mapper items(for Pie charts): - please select -	Select mapped items for Pie charts
Query expression:	input SQL query expression

The is Area Charts example.

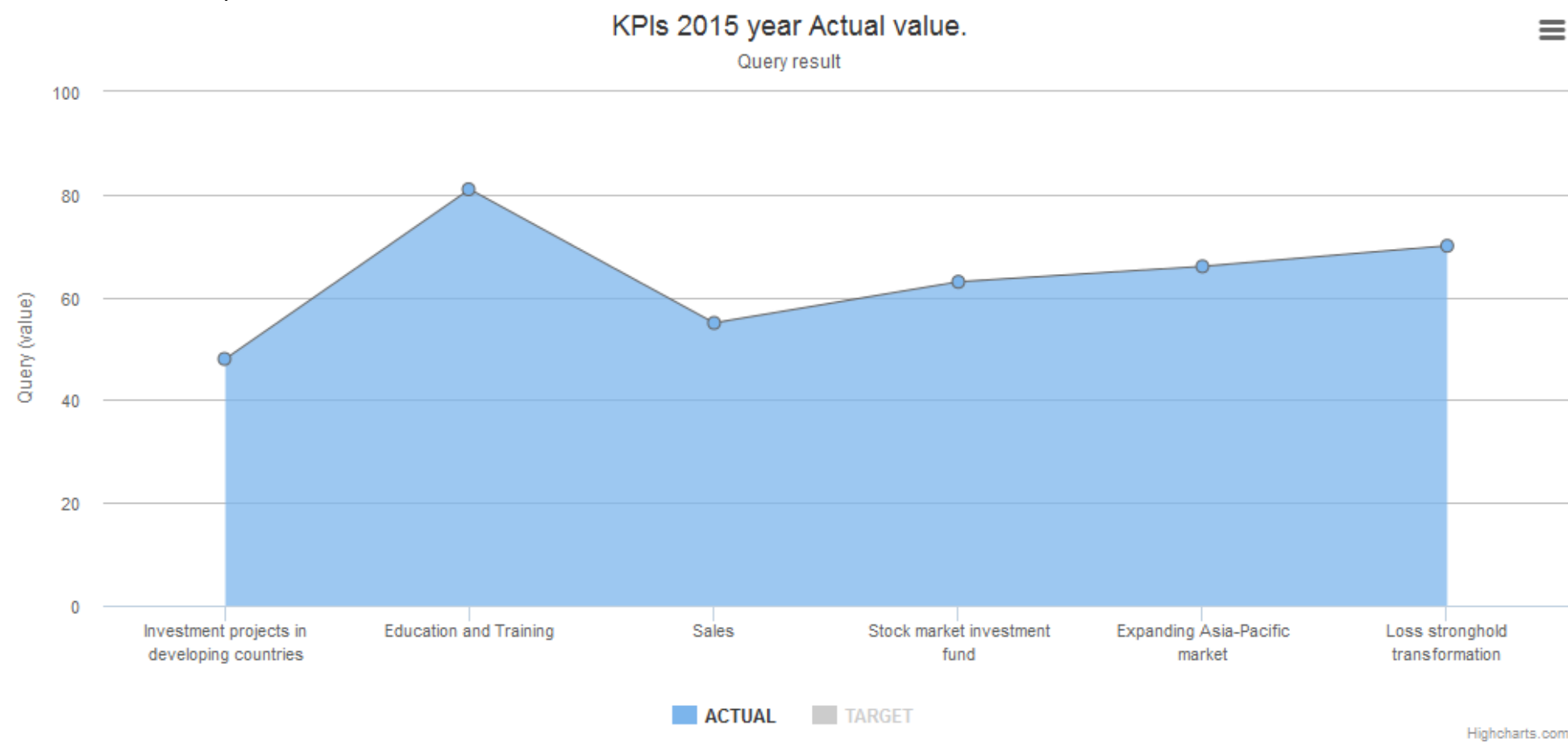


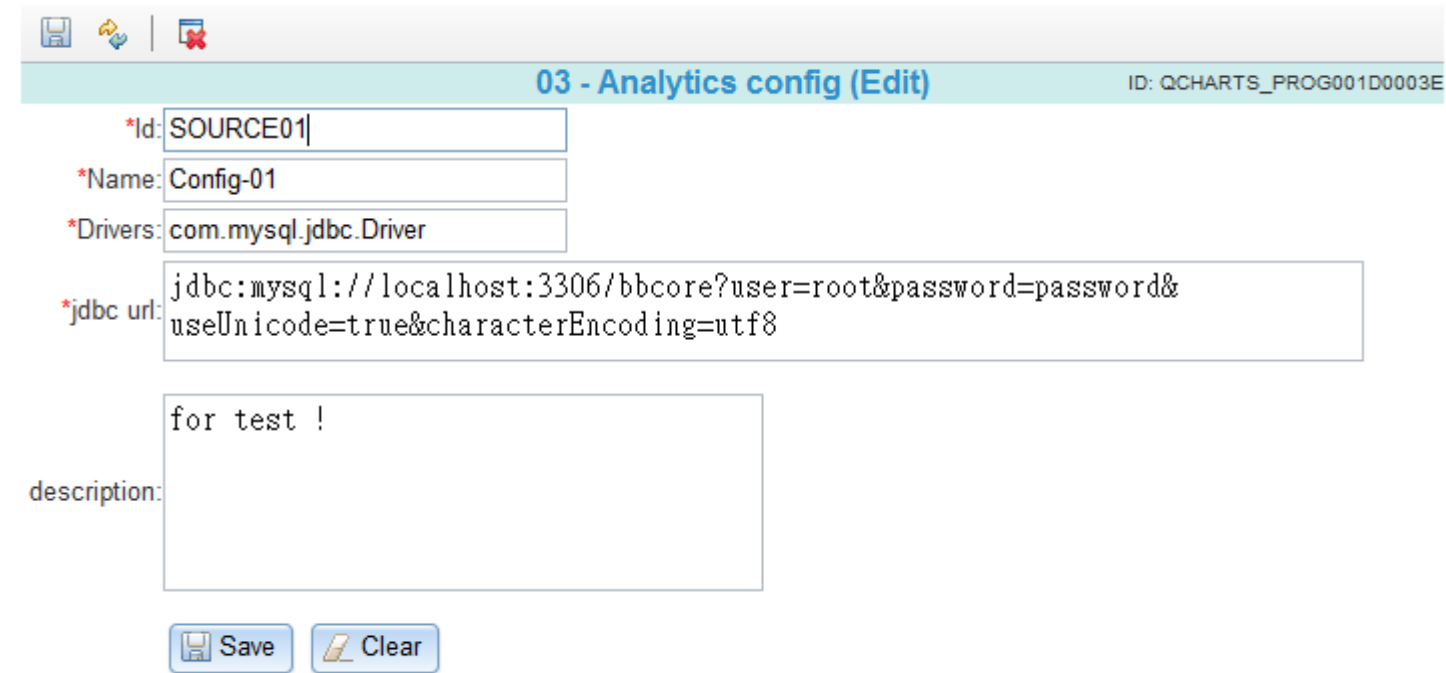
figure 12-03

13. Analytics (OLAP)

This feature is to provide a simple OLAP . MDX Query results can be exported into HTML file or EXCEL file .

13-1. Settings datasource

click “03 - Analytics config “ on menu tree. And to create mode look (figure 13 – 01) .



The screenshot shows a web application window titled "03 - Analytics config (Edit)" with a sub-header "ID: QCHARTS_PROG001D0003E". The window contains several input fields and buttons:

- *Id: SOURCE01
- *Name: Config-01
- *Drivers: com.mysql.jdbc.Driver
- *jdbc url: jdbc:mysql://localhost:3306/bbcore?user=root&password=password&useUnicode=true&characterEncoding=utf8
- description: for test !

At the bottom, there are two buttons: "Save" and "Clear".

figure 13 – 01

Id: input config Id.

Name: input config name.

Drivers: input jdbc driver class name. (If you want to provide other DB connection driver(SQL-Server or Oracle, pqSQL ...), please put Driver LIB jar file to [WEB-INF/lib](#))

Jdbc url: jdbc url. (url string parameter must include the **account** and **password**)

Description: memo or explain

13-2. Upload Mondrian Catalog file

Upload Mondrian catalog file and management. How to build catalog xml file please download **mondrian schema workbench** (<http://sourceforge.net/projects/mondrian/files/schema%20workbench/>) now vision is 3.9.0 , use workbench create catalog example (figure 13-02)

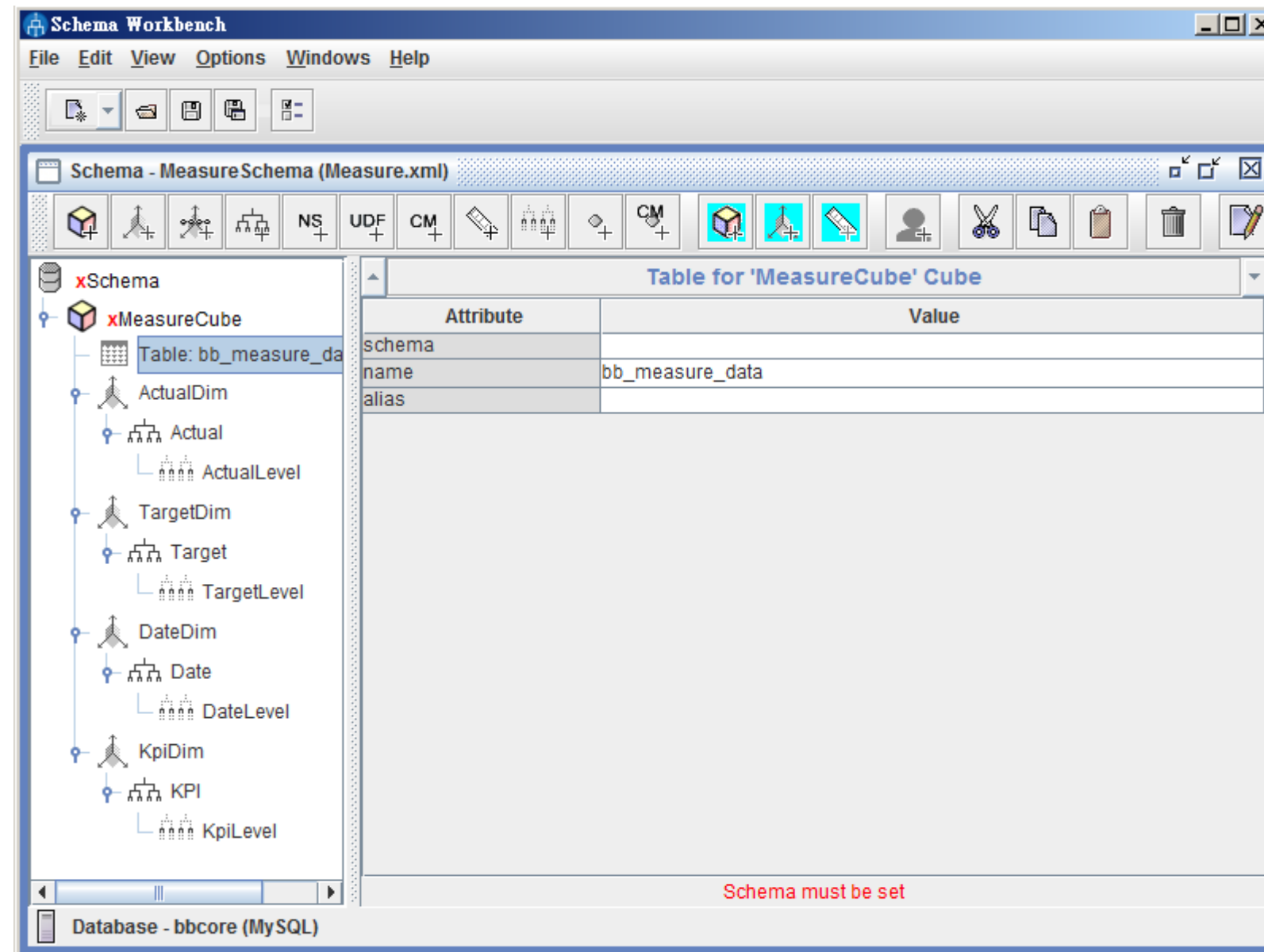


figure 13 - 02

After the **schema workbench** output of the **catalog xml file** using the " 04 - Analytics Catalog " to upload it . Look (figure 13 – 03)

04 - Analytics Catalog (Create)

ID: QCHARTS_PROG001D0004A

*Id:

*Name:

*Mondrian Catalog:

not Yet upload files!

description:

Save

Clear

Click the button to upload an catalog xml file

figure 13 – 03

- Id:** input catalog Id.
- Name:** input catalog name.
- Mondrian Catalog:** select an catalog xml file to upload.
- Description:** memo or explain

13-3. Analytics MDX query

Execute MDX query and display or output results. Click “02 - Analytics ” on menu tree. Look (figure 13 – 04)

02 - AnalyticsID: QCHARTS_PROG002D0002Q

Options

Save query

Clear

Delete

History: Sample - 01Name: Sample - 01Dimension Title:☒Parent Members:☒

Config: SOURCE01 - Config-01Mondrian Catalog: C01 - Example-Catalog!

MultiDimensional eXpressions:

SELECT ActualDim.Children ON ROWS, KpiDim.Children ON COLUMNS FROM [MeasureCube]

figure 13 – 04

ICON	Description
	Query results show as HTML results.
	Export HTML results as a file.
	Export results as a Excel file.
	Save MDX to history data.
	Clear
	Delete current select history data.
History: Sample - 01	Select history data.
Name: Sample - 01	Query name.
Dimension Title: <input checked="" type="checkbox"/>	Check show Title.
Parent Members: <input checked="" type="checkbox"/>	Check show members.
Config: SOURCE01 - Config-01	Select OLAP datasource config.
Mondrian Catalog: C01 - Example-Catalog!	Select OLAP catalog config.
MultiDimensional eXpressions: <div>SELECT ActualDim.Children ON</div>	input MDX query string.

14. bambooBSC mobile version

14-1. Mobile web.

Click link to mobile version on Login page.

bambooBSC

Language

EN - English (default)

Account

Password

login

Please use **Chrome** (recommend) or **Firefox** browser, can not support other browser.

bambooBSC 0.7.0 version

click link to Mobile version

click to Mobile version

Menu item, 1.**Scorecard**, 2. **Dashboard**, 3. **Strategy MAP**, if want logout please click **Logout**

bambooBSC

Scorecard Dashboard Strategy MAP About Logout

Frequency

Menu item

Year

Measure-data begin date

2016/11/13

Measure-data end date

2016/11/13

Refresh / Query

Measure-data begin/end date description!
The Frequency is **Year / Half of year / Quarter** , begin/end date capture **yyyy** for query.
The Frequency is **Month / Week** , begin/end date capture **yyyy-MM** for query.
The Frequency is **Day** , begin/end date capture **yyyy-MM-dd** for query.

14-2. Mobile web base operation

Mobile Scorecard

bamboobSC

Scorecard

Dashboard

Strategy MAP

About

Logout

Frequency

Year

Measure-data begin date2016/11/13

Measure-data end date2016/11/13

Refresh / Query

Example vision

Click this pane to show next item.

Score: 72.38 Percentage: 72 %

Mission, Vision & Values (not over A4 paper width!)

Example vision

Financial

Target: 100

Min: 50

Weight: 25 %

Score: 58.5 Percentage: 58 %

Description:

Click this pane to show Previous detail.

Click this pane to show next item.

Mobile dashboard please view next page image.

bambooBSC

ScorecardDashboardStrategy MAPAboutLogout

Vision

Example vision

Frequency

Year

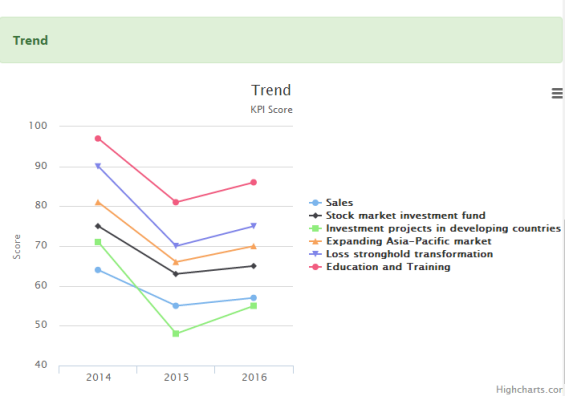
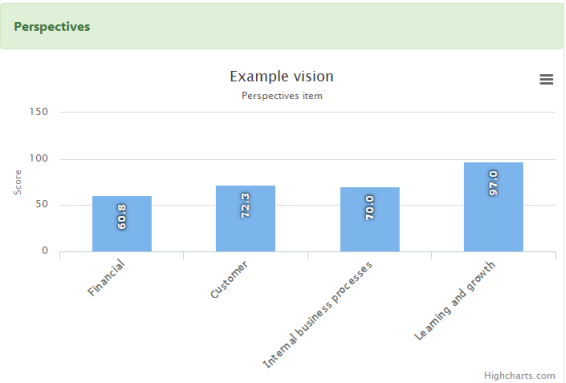
Measure-data begin date

2014/10/28

Measure-data end date

2016/10/28

Refresh / Query

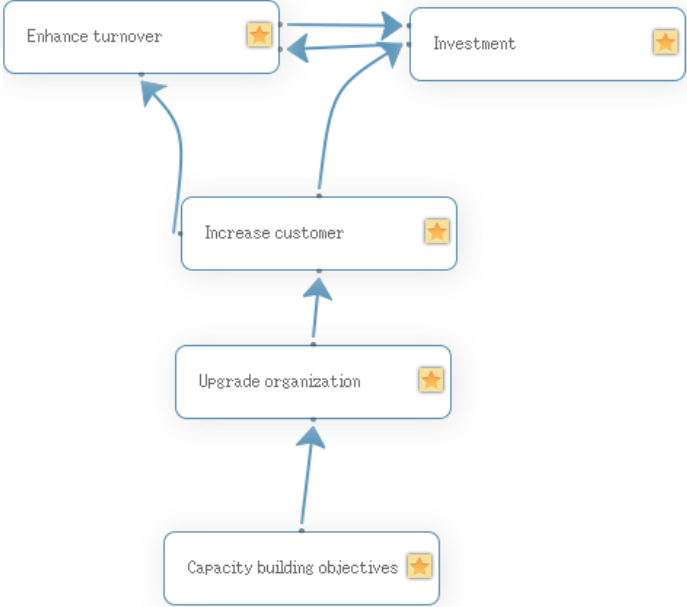


Mobile Strategy MAP

Vision

Example vision

Select vision
will show MAP.



15. PDCA (Plan / Do / Check / Action)

01 - PDCA Project

bambooBSC

01 - PDCA Project

Title:

Date range:

Start

End

click to create new project.

Query

Clear

total: 4

page

1

/ 1

row size

10

View / Edit	Title	Start	End	Confirm	Confirm date
<div><div></div><div></div></div>	測試專案	2016/04/01	2016/12/31	Y	2016/04/25
<div><div></div><div></div></div>	測試專案-(New)	2016/04/01	2016/12/31	Y	2016/04/25
<div><div></div><div></div></div>	測試專案-(New)-(New)	2016/04/01	2016/12/31	Y	2016/04/25
<div><div></div><div></div></div>	測試專案-(New)-(New)-(New)	2016/04/01	2016/12/31	N	

Create new PDCA Project

bambooBSC 01 - PDCA Project (Create)

*Title:

input project title

Save

Clear

Content

Plan / Do / Check / Action

*Date range:

StartEnd

^ BSC Report measure settings

Frequency: Year

Start year: End year: Start date: End date:

Data type: All Organization / department: - please select - Personal / employee: - please select -

*Responsibility (Organization / Department):

*Responsibility (Employee):

*KPIs:

Click to pick KPIs.

Description:


Document / attachment:

Click this Tab to create PDCA project items.

click to pick Department.

Click to pick Employee.

PDCA Project department pick.

 Department

directory.

☐ USA office

Click the label, pick it.

☐ Taiwan office

☐ Kaohsiung branch

PDCA Project owner/Employee pick.

Employee

X

bambooBSC Employee

Employee serial-number:

Name:

Q Query

X Clear

total: 4

I◀ ◀

page 1 / 1

▶ ▶I

row size 10 ▾

*	Id	Account	Full name	Job title
<input checked="" type="checkbox"/>	0001	admin	Administrator	MIS
<input type="checkbox"/>	0002	tester	Bill chen	Sales Manager
<input type="checkbox"/>	0003	tiffany	Tiffany Wang	HR manager
<input type="checkbox"/>	0004	steven	Steven	Sales

Click the checkbox to pick.

PDCA KPIs tree pick

PDCA Project item add.

Content

Plan / Do / Check / Action

*Type:

Plan

Select PDCA item type P, or D, or C, or A .

*Title:

TEST

input item title.

*Date range:

Start2016/04/01End2016/04/30

Input item start-date and End-date.

Description:

this is test!!

PDCA Project , item must has type

P item.

D item.

C item.

A item.

Click Add button to add this item.









Add

*	Type	Title / Date / description
	P	<div>TEST this is test!!</div> <div>Date range: 2016/04/01 - 2016/04/30</div> <div>*Responsibility (Employee) </div> <div>Document / attachment: </div>





item must be to pick Responsibility/Employee.

Audit project.

total: 4 ⏪ ⏩ page 1 / 1 ➡ ⏪ ⏩ row size 10 ▼

View / Edit	Title	Start	End	Confirm	Confirm date
 	測試專案	2016/04/01	2016/12/31	Y	2016/04/25
 	測試專案 (New)	2016/04/01	2016/12/31	Y	2016/04/25
 	測試專案-(New)-(New)	2016/04/01	2016/12/31	Y	2016/04/25
 	測試專案-(New)-(New)-(New)	2016/04/01	2016/12/31	N	

Click to edit page.

   | 

bambooBSC 01 - PDCA Project (Edit)

*Title:

Save

Clear

Start apply

Confirm audit

View audit diagram

Start project audit process

View now audit step of PDCA Project

<

Confirm audit for PDCA Project

01 - PDCA Project

01 - PDCA Project (Create)

01 - PDCA Project (Edit)

bambooBSC

01 - PDCA Project (Edit)

*Title:

測試專案-(New)-(New)-(New)

Save

Clear

Start apply

Confirm audit

Current audit info

Now task: Plan

Confirm: Y

Assignee: admin

Date: 2016/04/25

Reason:

Start PDCA audit processing, 測試專案-(New)-(New)-(New)

Content

Plan / Do / Check / Action

*Date range:

Start

2016/04/01

End

2016/12/31

BSC Report measure settings

Frequency:

Year

Start year:

2016

End year:

2016

Start date:

Data type:

All

Organization / department:

PDCA Project confirm audit

*Confirm:

Yes

Reason:

Please allow: Plan

New child project:

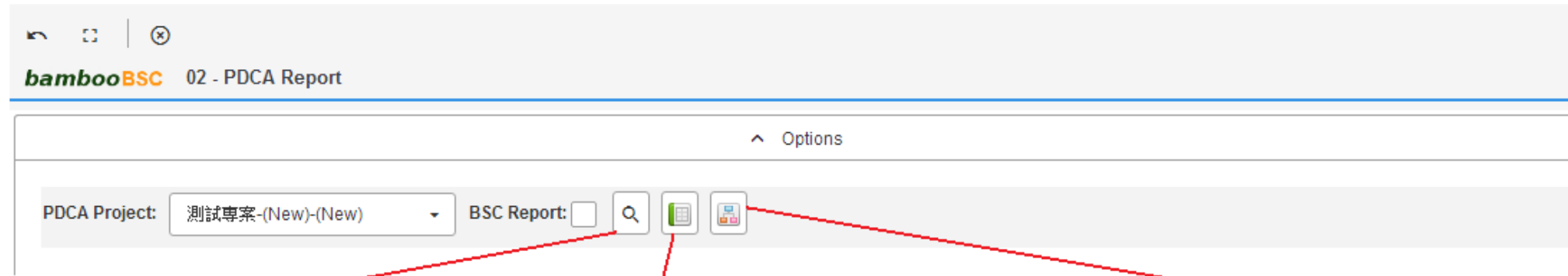
☐

this checkbox only final step can check

Save

Clear

PDCA Report query operation



Show HTML report.

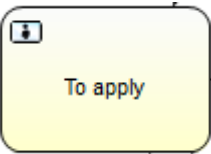

Download Excel(xlsx) report.

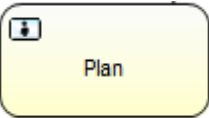
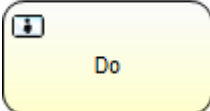
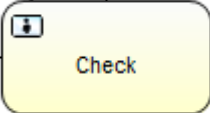
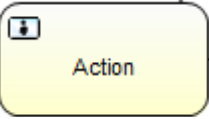
if has checked "BSC Report"
will download ZIP file. please unzip the file.

Show project parent/child.

16. Audit settings (if PDCA Project or 360 Project edit page cannot click “Confirm audit” button)

Please use “05 – BPMN Resource role” to management. Add an task audit for an user Role.
The default account has permission to audit. Later new added account, please set audit permission by self (admin can do it).

360 Degree feedback project audit process.		
Resource ID	Task icon	Task name
DFProjectPublishProcess		To apply
DFProjectPublishProcess		HR Manager Approval

PDCA project audit process.		
Resource ID	Task icon	Task name
PDCAProjectProcess		Plan
PDCAProjectProcess		Do
PDCAProjectProcess		Check
PDCAProjectProcess		Action