ObjTracker - Balanced Scorecard

User Guide

Target Audience:

This guide is for both the users of the Balanced Scorecard and the non-administrative tasks of the Balance Scorecard administrator(s). Both types of users will probably be entering measurements and attaching documents to support those measurements.

The Balanced Scorecard administrator must do an initial setup, define Balanced Scorecard users and departments, create objectives, and manage the application on an ongoing basis. The Balanced Scorecard administrator generally should be either an administrative assistant to the organization's executive or department leaders.

Table of Contents

U.1 Introduction

Balanced scorecard is a management system that enables the organization to clarify its vision and strategy and translate them into action. It provides feedback about internal business processes and external outcomes in order to improve strategic performance and results continuously.

U.1.1 Terms used within this document

Fiscal Year   The start and end of your organization year for planning, tax, or other reasons.

For fiscal years that are not aligned with calendar years, the fiscal year is often in yyyy-yy format such as 2012-13 or as fiscal year 2013 using the last year of the fiscal year pair. The administrator sets the formatting of the fiscal year text.

Objective   An objective is a measurable aim or intended result of a strategy.

Objective type   The category of the objective answers one of the following questions:

Customer	How do customers see us?
Employee Development	How can we continue to improve and create value?
Financials	How do we look to shareholders?
Internal Business Process	What must we excel at?

Measurement   A quantifiable representation of activities performed by a department, program or unit in pursuit of an objective. Typical measurement categories include outcomes, outputs, efficiency and productivity.

Metric type   The metric type enforces the range and formatting of an objective's measurements for the life of the objective. Types include:

Completion Date	A date written with digits in the form of mm/dd/yyyy, such as "12/25/2012".
Dollar	A whole dollar currency value written with at dollar sign ("$") such as "$200,000".
Integer	A whole number such as "5".
Percentage	An amount expressed in hundredths with at % sign, such as "98%".
Ratio	The relation between two values separated with a colon (":") such as "4:1".

After an objective is defined, the frequency of an objective can not be changed.

Frequency   The measurements of objectives are expected to be recorded on yearly, bi-annual, quarterly or monthly periods. After an objective is defined, the frequency of an objective can not be changed.

Dashboard   This report displays the progress achieved for all of the objectives of a specific fiscal year.

Baseline   This report displays the progress achieved for all objectives over all fiscal years.

Targets   For each objective the administrator defines three values for each fiscal year that judge the achievement of the expected outcome.

Target   The desired value indicting that the objective has been fully completed.

Near Target A value that indicates that the objective was almost met.

Far Target   A value that indicates that the objective was further from being met.

U.1.2 Target values, measurements, and status

The balanced scorecard uses an objective's target values to assign a status to the objective.

Status Icons

The icons below provide a quick visual clue to evaluation of the measurements relative to the targets. You can hover the cursor over the icon for a brief explanation.

◆   The measurement matches or exceeds objective.

⬤   The measurement matches or exceeds the near target but is short of the objective.

▲   The measurement matches or exceeds the far target but is short of the near target.

⬣   The measurement is far from the target.

■   No measurement has been entered.

Target greater than near target greater than far target

Objectives can be defined with a higher value being more desirable than a lower value.

Examples:
When a greater value is preferred:
- Higher attendance is better.
- Higher donations level is better.
- Completing more of the task is better.

When on a time line, a later date is preferred:
- It is better when the funds in an account last longer.
- It is better when the truck lasts longer.

Target less than near target less than far target

Objectives can be defined with a lower value being more desirable than a higher value.

Examples:
Lower value is preferred:
- Lower truancy is better.
- Lower number of sick days is better.

When on a time line, an earlier date is preferred:
- It is better to complete a building earlier.
- It is better to reach a donation level earlier.

U.1.3 Common page features

The Menu

The menu drives the navigation.

Alerts	For non-administrators, a list of those objectives whose measurements that you are expected to input values for. Links to page for adding or revising those measurements and to a page for uploading supporting documentation in the the form of documents, spreadsheets, etc.
	For Administrators, a selector to choose a list of those objectives whose measurements that you are expected to input values or a list of all objectives.
Objectives	List of objectives that can be selected to view the objective definition, target values, measurements, and supporting attached documentation.
	Non-administrators can update the measurements and supporting attached documentation of the objectives that they own.
	Administrators can update all of the components.
Dashboard	Report a specific fiscal year's results.
Baseline	Report each fiscal year's results for all objectives.
Admin	(Administrators only) Drops down to show pages for managing the definition of fiscal years, departments, people, metric types, objective types, etc.
Audit	(Administrators only) Drops down to show variations of indexes reporting on changes made to the Balanced Scorecard data

Common table functionality

The following features are common to most of the Balanced Scorecard tabular displays.

1. Instructions - a header that includes a show (⊻) or hide (⊼) icon on the right. You can chose to show or hide a this description.
2. ID column is of use only to those administering the Balanced Scorecard.
3. Those column headers that are underlined can be clicked to sort the table's contents by that column. Clicking the same column header toggles between ascending and descending order.
4. Hovering the mouse over the status icons, displays a description of the meaning of the icon.

U.2 Alerts

The Alerts tab lists those objectives owned by the user and where the user enters new measurements.

U.2.1 Alert list

Alerts are displayed in a table with your assigned objectives:
1. Status –A black box is displayed for those measurements that are missing. Red, yellow, or green icons indicate that the measurement is short of the target value.

1. Add or Revise link –

   The **Add** link is for missing measurements and the red, yellow, or green icons are for altering a previously entered value.   The Add link is the only way to add a measurement.

   The **Revise** link allows you to change a measurement for the current period if it is not already complete. Measurements can also be done via the Objectives menu.

2. Category – Category lists one of the four types of objectives (financial, customer, process, and employee).

3. Frequency – Frequency defines the length of the period that measurements are collected.

4. Starting date of period – The starting date for the objective.

5. Objective – The title of the objective.

If there are no alerts for the user, a message indicates that "No alerts are assigned at this time."

U.2.2 Adding or revising a measurement

To revise a current measurement or add a missing measurement, click **Add** or **Revise** objective on the Alerts panel and the measurement entry page appears.

Instructions
Fill in values and click **Save**.

Measurement Entry
Revise measurement for period starting: 2012-01-01
Category   Customer
Title   Grow number of people that we serve
Description Use year end total. The plan is to reach 5,000 individuals in 5 years.
Source   Database of individual served.

Target   1   **Type:**   Integer   **Format:**   nn,nnn,nnn
Measurement 2

Notes
Use
Shift+Enter
for newline.

Save   Save and attach documents   Cancel

This page displays a summary of the objective, the objective's targets, and two fields for entering the measurement value and notes concerning the measurement.

Notice that the type of value is shown, in this case it is an integer with hit of how integers are formatted. On entry commas for numeric values are optional but once saved the value will be reformatted according to the type.

Click **Save** to update the value and return to the Alerts page.

Click **Save and attach documents** to upload supporting documentation.

U.2.3 Measurement attachments

Objective: Grow number of people that we serve

Attach new document
(1) Browse to file, double click the file name

                         Browse...

(2) Enter description:

(3) Click **Add**   Add
(4) View the file characteristics
(5) Repeat to add additional files or click **Go back** to return.

Attachments
Rows returned: 0

ID	Period Starting	Document Name	Description	Added	By

Attachments are listed at the bottom and they can be viewed by clicking their name.

Attachments
Rows returned: 1

The attachment has been deleted.

ID	Period Starting	Document Name	Description	Added	By	
2	2012-01-01 00:00:00	**JabsUser.odt**	Users document	07/10/2013	admin	**Delete**

U.3 Objectives, targets, and measurements in detail

The Objectives menu selection lists all objectives selected. By clicking into each objective, you can view and/or update the objective and of it related parts.

Click on the Objectives menu item.

Instructions

The table below lists the objectives assigned to individual departments for the current and/or all fiscal years.

- To sort the table, click on **ID**, **People**, **Title**, **Short Title**, **Active**, **Changed**, or **By**.
- To change selected objectives, select from **Department** and from **Fiscal Year**.
- To delete an unreferenced department, click on **Delete**.
- To create a new objective, click on **New**, specify appropriate details, and then click on **Save**.
- To view a formatted report of the selected objectives, click on **Report**.
- To extract a spreadsheet of the selected objectives, click on **Excel Download**.

Objectives

Department: | All assigned to me ∨ | This FY ∨ | Rows returned: 1   New   Report

ID	Measures	Dept	Objective	Frequency	Public	Fiscal Years
1	1	Replace	**Grow number of people that we serve**	Annual	Private	2012 to 2014

Excel Download

For non-administrators, this page shows all of the objectives assigned to you but with the selectors, you can view different groups of objectives.

U.3.1 An objective's definition

Click on the objective name to view the objective's description, fiscal year targets, and the measurements that have already been entered.

Instructions   ⊼

Below is the detail of the selected objective, its fiscal year target values, and measurements

Objective Definition   ⊼

To change the objective, click on **Edit**, change values, and click on **Update**.

Title	Grow number of people that we serve
Type	Private: Customer: Annual
Fiscal Years	2012 to 2014
Description	Use year end total. The plan is to reach 5,000 individuals in 5 years.
Source	Database of individual served.
Owner	admin of Replace me at setup
Metric Type	Integer, **Format:** nn,nnn,nnn

Edit (at right of Title)

Changed 07/09/2013 by admin

Fiscal Year Targets   ⊼

To change the target values for a fiscal year, click on **Edit**, change the value(s), and click on **Update**.

Fiscal Year	Target	Near(Green)	Far(Yellow)	Changed	By	
2012	1	2	3	07/09/2013	admin	**Edit**
2013	1	2	3	07/09/2013	admin	**Edit**
2014	1	2	3	07/09/2013	admin	**Edit**

Measurements Recorded   ⊼

To change a measurement, click on **Edit**, change the value(s), and click on **Update**.

ID	Status	Docs	Starting	Measure	Notes	Changed	By	
1	🟢	**Yes:1**	2012-01-01	2		07/09/2013	admin	**Edit Delete**

Click **Add** to add missing.

	Period
Add	2013-01-01

The Description, Objective definition, Fiscal year targets, and the Measurements recorded sections divide the page.

When viewed by an administrator, the objective definition has an edit button for changing values.

U.3.2 An objective's fiscal year targets

This section lists the target values that the administrator has entered for this objective. The target is the desired outcome. The near target defines a value that is short of the target. The far defines a value that is less desirable.

The values are used to compute the status for a measurement.

When viewed by an administrator, this each row of this table has an edit button for changing values.

U.3.3 An objective's measurements

This section lists the measurements that have been entered or "Missing" entries for prior period that are lacking a measurement.

Measurements

The Attached column shows the count of files that have been uploaded for a measurement's period. Click the count value to display a page listing the attached documentation where you can upload additional documents.

The status displays the progress made in achieving the objective.

When viewed by an administrator, this each row of this table has a delete button.

Editing measurements

To change a measurement value or add a comment, click the Edit link for that measurement.

Enter a measurement in the format indicated on the objective definition or revise the note. You can use Shift-Enter to place line breaks within the note.

Click the Update link to save the changes. If the measurement is not in the correct format, an error message is displayed. The objective defines the metric type that also show the format for that type.

U.3.4 An objective's attachments

To see attachments, add attachments, or delete attachments, click the Attached link for that measurement.

Attachments are listed at the bottom and they can be viewed by clicking their name.

U.4 Viewing reports

U.4.1 Objective report

The Report link on the Objectives page generates a listing of all of the objectives matching the objective list shown along with their target values and measurements.

U.4.2 Dashboard

The Dashboard reports the progress of all objectives for a single fiscal year. The Target value is the target value of the selected fiscal year and the Measurement is the last measurement entered for the selected fiscal year.

To view the Dashboard report, click Dashboard on the menu.

Use the Fiscal Year drop down box to select fiscal years other than the current fiscal year.

The status displays the progress made in achieving the objective.

The "Spreadsheet Download" link downloads a spreadsheet of the displayed values to your computer... The "Spreadsheet Download Raw" downloads the data that the report is based on.

U.4.3 Baseline

The Baseline report shows the progress of all objectives for all fiscal years up to the current fiscal year.

Click Baseline on the menu to view the Baseline report.

Instructions

The table below lists each objective with its current year status, its final target value, and the last recorded measurement of each fiscal year

- To view the definition of the status icon, hover the mouse over the icon.
- To sort the table, click on **ID**, **Status**, **Dept**, **Objective**, **Target**, or one of the fiscal years.
- To extract a spreadsheet of these results, click on **Excel Download** or **Excel Download Raw**.

Baseline

Count: 1

ID	Status	Dept	Objective	Target	2012	2013
1	■	Replace	Grow number of people that we serve	1	2	-

Excel Download Excel Download Raw

The Target value is the target of the last fiscal year of the objective and the measurements are the last measurement entered for each year. As more fiscal years pass, additional fiscal years are displayed in columns to the right.

The status displays the progress made in achieving the objective for the current fiscal year.

The "Spreadsheet Download" link downloads a spreadsheet of the displayed values to your computer... The "Spreadsheet Download Raw" downloads the data that the report is based on.