

# **bambooBSC 0.5**

bambooBSC Guide

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## Overview

bambooBSC is an opensource Balanced Scorecard (BSC) , It provides analysis of employee performance or department/organization performance.

### Core Features:

Sourcecard:

Establish and maintain scorecards information or maintenance KPI measure data . And Strategy Map

Report:

The report includes a KPI reports, department/Organization scorecard reports, personal scorecard reports, SWOT reports .

## Basic Operations

Please look figure-A .

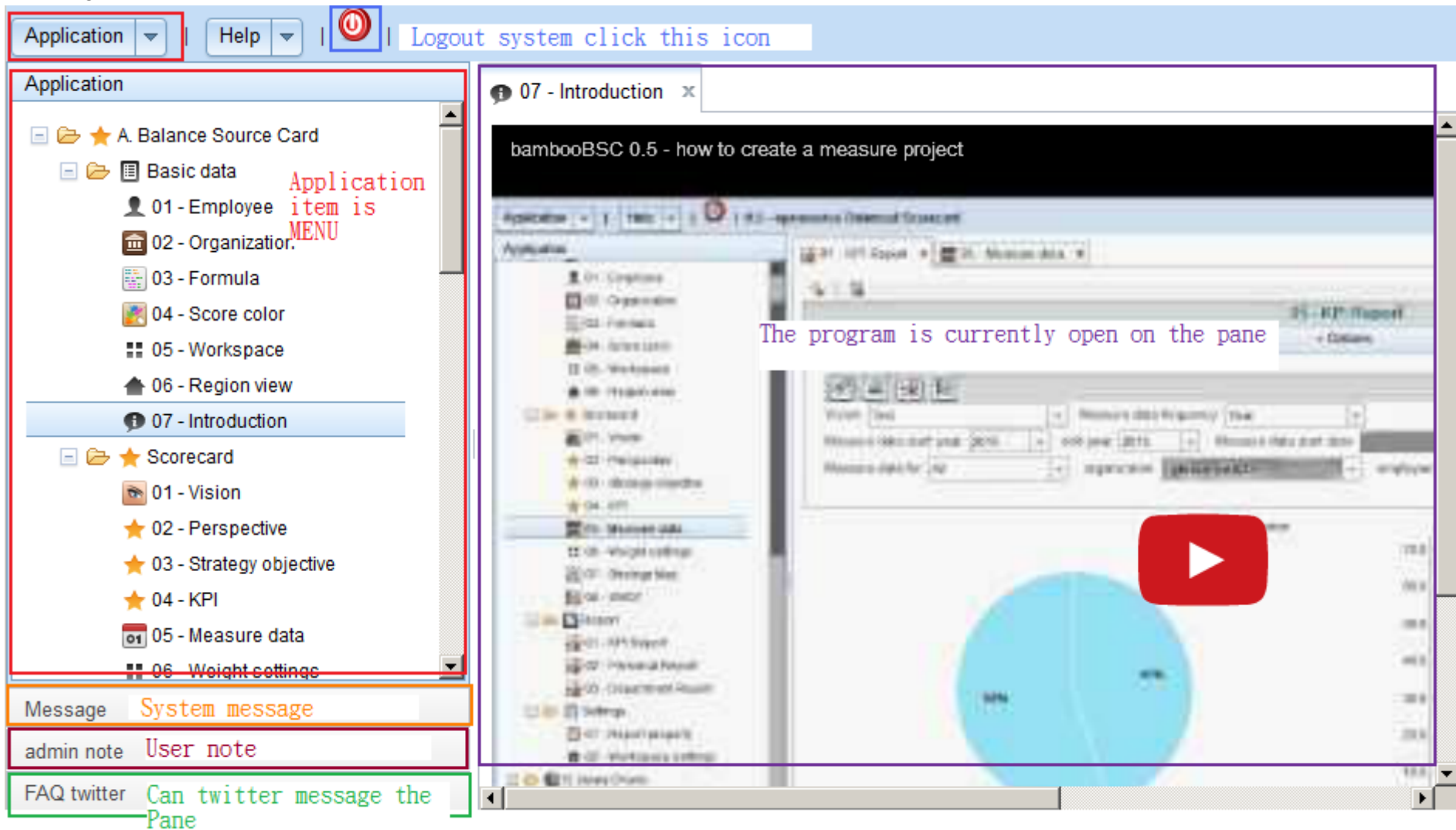


figure – A

## **Step sourcecard established**

How to build scorecard data , Reference Videos : <https://www.youtube.com/watch?v=A27wnMTtfOc>

### **1. establish a Vision**

Complete proposed goals and vision

### **2. establish Perspectives**

establish BSC four perspectives, about BSC perspectives please Reference : [http://en.wikipedia.org/wiki/Balanced\\_scorecard](http://en.wikipedia.org/wiki/Balanced_scorecard)

Established with the heads of each of the vision must have Perspective, otherwise this vision is invalid

### **3. establish Strategy Objectives**

Each set has established Objective item for a Perspective

The main goal of the strategic objectives narrative direction

### **4. establish KPI**

The establishment of key project of objectives can be measured create a KPI items.

### **5. maintain Measure-data**

Each KPIs item will need to maintain measure-data, no measure-data will not be calculated KPI performance scores .

## 1. Vision

First click “ 01 – Vision “ item on menu or tree menu. Look figure 1-01

The screenshot shows a web application window titled "01 - Vision". The window has a header bar with the title "01 - Vision" and an ID "ID: BSC\_PROG002D0001Q". Below the header, there are two input fields labeled "Id:" and "Title:". To the right of these fields are two buttons: "Query" and "Clear". Below the buttons, there is a pagination bar showing "total: 1", "page 1", and "row size 10". At the bottom, there is a table with two columns: "View / Edit" and "Title". The table contains one row with the ID "VIS20141114001" and the title "Example vision".








View / Edit	Id	Title
 	VIS20141114001	Example vision

figure 1-01

-  the icon to **create** page
-  the icon to **refresh** page
-  the icon to **close** page

Grid items:

-  the icon to **edit** current item data
-  the icon to **delete** current item data

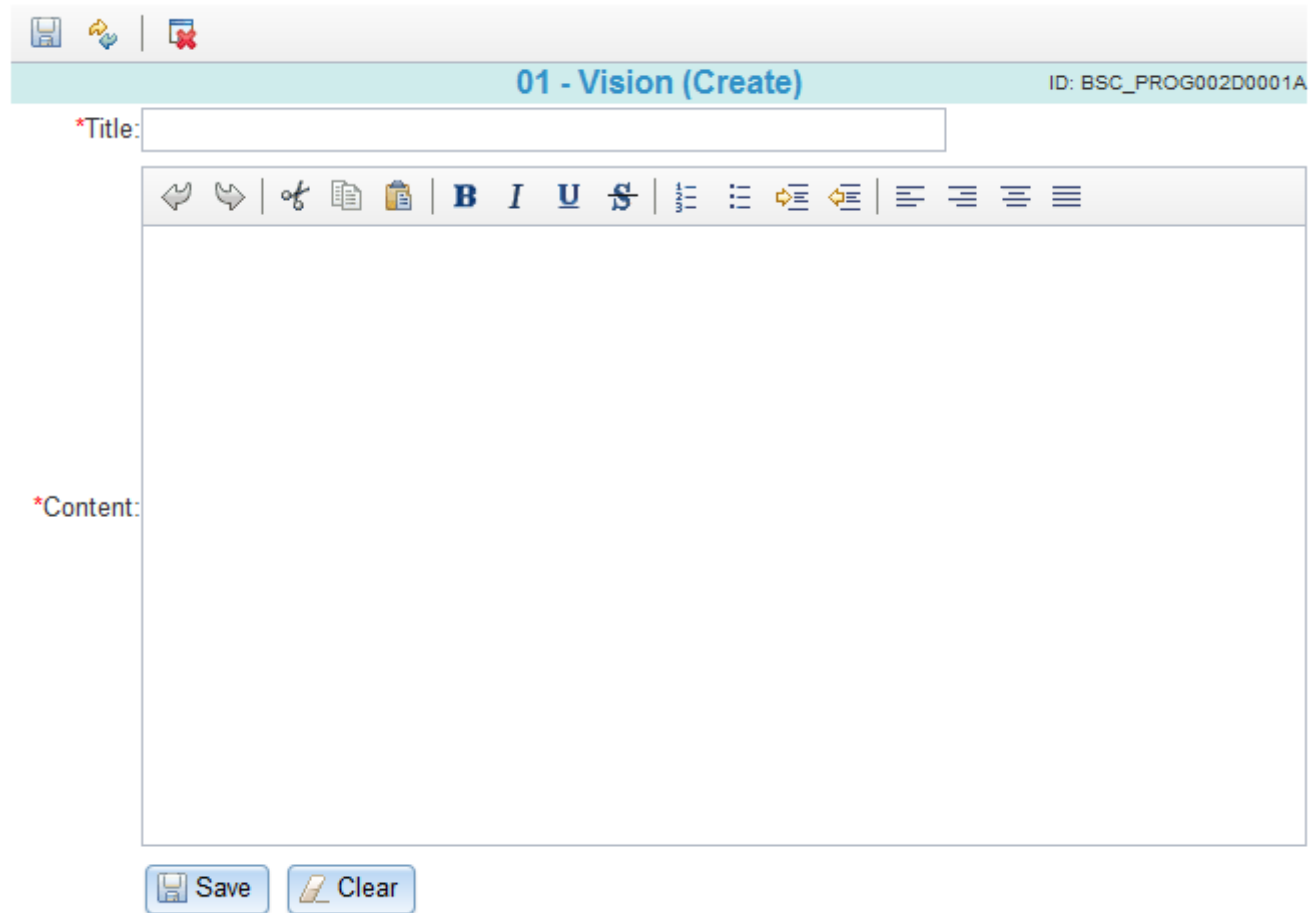
**Create Vision** first click 

will look figure 1-02 ,

**Title:** the item input title.

**Content:** the item input content data.

After the completion of data entry . Click “**Save**”

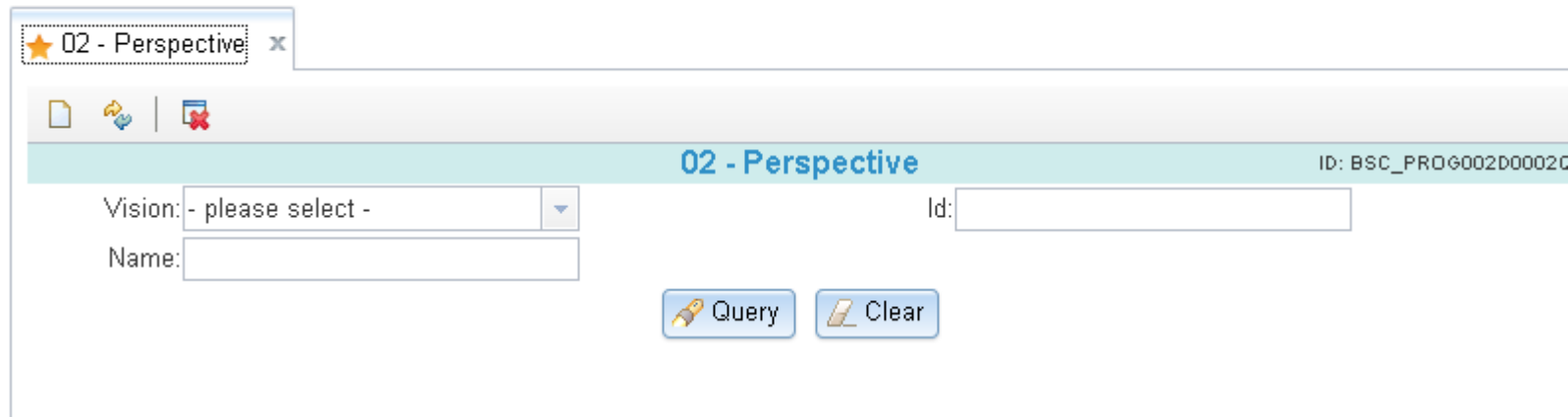


The screenshot shows a web-based form titled "01 - Vision (Create)" with the ID "BSC\_PROG002D0001A". The form includes a text input field for the title, labeled with a red asterisk and the text "\*Title:". Below this is a large text area for content, also labeled with a red asterisk and the text "\*Content:". The text area has a rich text editor toolbar with various icons for text formatting and editing. At the bottom of the form are two buttons: "Save" and "Clear".

figure 1-02

## 2. Perspectives

Click “02 – Perspective” item on menu or tree menu. Look figure 2-01



The screenshot shows a web application window titled "02 - Perspective". The window has a light blue header bar with the title "02 - Perspective" and a small ID "ID: BSC\_PROG002D0002Q". Below the header, there is a form with the following fields and buttons:

- A "Vision:" dropdown menu with the text "- please select -".
- An "Id:" text input field.
- A "Name:" text input field.
- Two buttons: "Query" (with a magnifying glass icon) and "Clear" (with an eraser icon).

figure 2-01

**Create Perspective** first click 

look figure 2-02

**Vision:** select Perspective's vision

**Name:** Perspective's name , Usually BSC four perspectives ( Financial, Customer, Internal business processes, Learning and growth)

**weight:** recommend value is 25 . (BSC typically there are four perspectives , so  $100/4$  is 25 )

**target:** Perspective's target value.

**Min:** Perspective's min value.




**Description:** memo or explain

Click “**Save**” to create perspective item data.




★ 02 - Perspective x

★ 02 - Perspective (Create) x







02 - Perspective (Create)



ID: BSC\_PROG002D0002A

\*Vision: - please select - 


\*Name:

\*weight: +000.00 

\*target: +000.00 

\*min(alert): +000.00 

description:

 Save



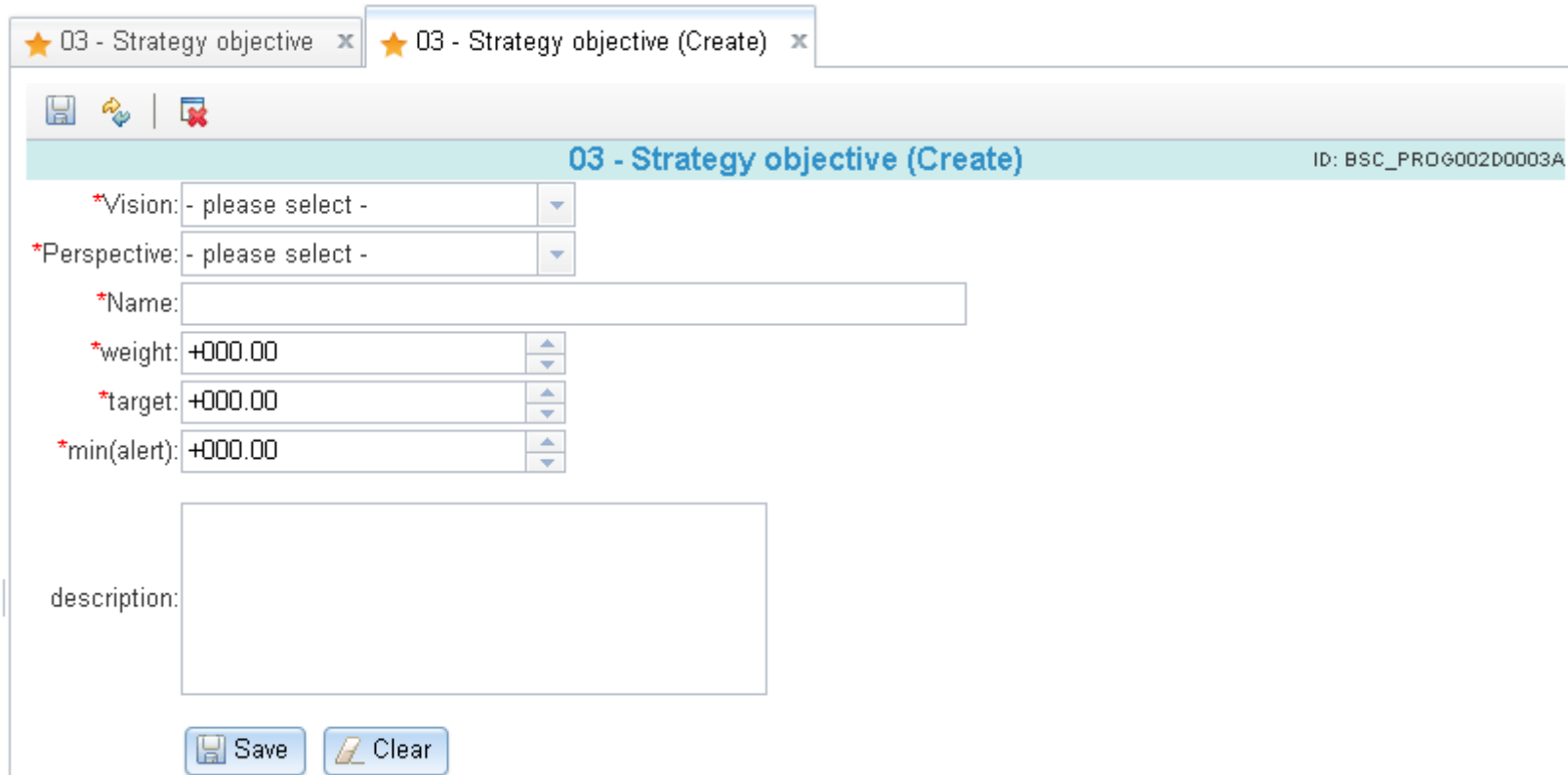
 Clear

figure 2-02

### 3. Strategy objective

Click “ 03 – Strategy objective “ item on menu or tree menu. After click   
look figure 3-01



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

03 - Strategy objective (Create) ID: BSC\_PROG002D0003A

\*Vision: - please select -

\*Perspective: - please select -

\*Name:

\*weight: +000.00

\*target: +000.00

\*min(alert): +000.00

description:

Save Clear

figure 3-01

**Vision:** select objective's vision

**Perspective:** select objective's perspective

**Name:** objective's name

**weight:** Must be greater than ZERO. If set to ZERO does not make sense

**target:** target value.

**min:** min value.

**description:** memo or explain

#### 4. KPI

Click “ 04 – KPI “ item on menu or tree menu. After click  
look figure 4-01



figure 4-01

★ 04 - KPI x ★ 04 - KPI (Create) x

04 - KPI (Create)

\*Vision: - please select -

\*Perspective: - please select -

\*Objective: - please select -

\*Id:

\*Name:

\*Formula: - please select -

\*weight(%): +000.00

\*target: +000.00

\*min(alert): +000.00

\*Compare type: - please select -

\*Unit:

\*Management method: - please select -

\*Calculation: - please select -

\*Belong type: - please select -

Department:

Employee:

Organization measure-data separate: ☒

Personal measure-data separate: ☒

description:

for quasi is better: 0%

Save Clear

**Vision:** select KPI's vision

**Perspective:** select KPI's perspective

**Objective:** select KPI's objective

**Id:** KPI's id

**Name:** KPI's name

**Formula:** KPI's formula , It will affect the calculation of scores, Formula create or edit/modify please try “Basic data / **03 - Formula**”

**weight:** Must be greater than ZERO. If set to ZERO does not make sense

**target:** target value.

**min:** min value.

**Compare type:** with target (the KPI scores compare target value) , with min (the KPI scores compare min value)

**Unit:** KPI's unit

**Management method:** Bigger ( score bigger is better) / Smaller ( score smaller is better) / Quasi ( score quasi is better)

**Calculation:** Average , Total , Max , Min

Examples the KPI have TWO measure-data

A. 2014 measure-data score is 50

B. 2015 measure-data score is 80

range 2014 ~ 2015


Average score =  $(50 + 80) / 2 = 65$

Total score =  $50 + 80 = 130$

Max score = 80


Min score = 50

**Belong type:** recommend select “Both”

**Department:**  click open pop-window to select ( figure 4-02 )

 click clear select value

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

 click clear select value

**Organization measure-data separate:** recommend is checked / enable

**Personal measure-data separate:** recommend is checked / enable

**description:** memo or explain

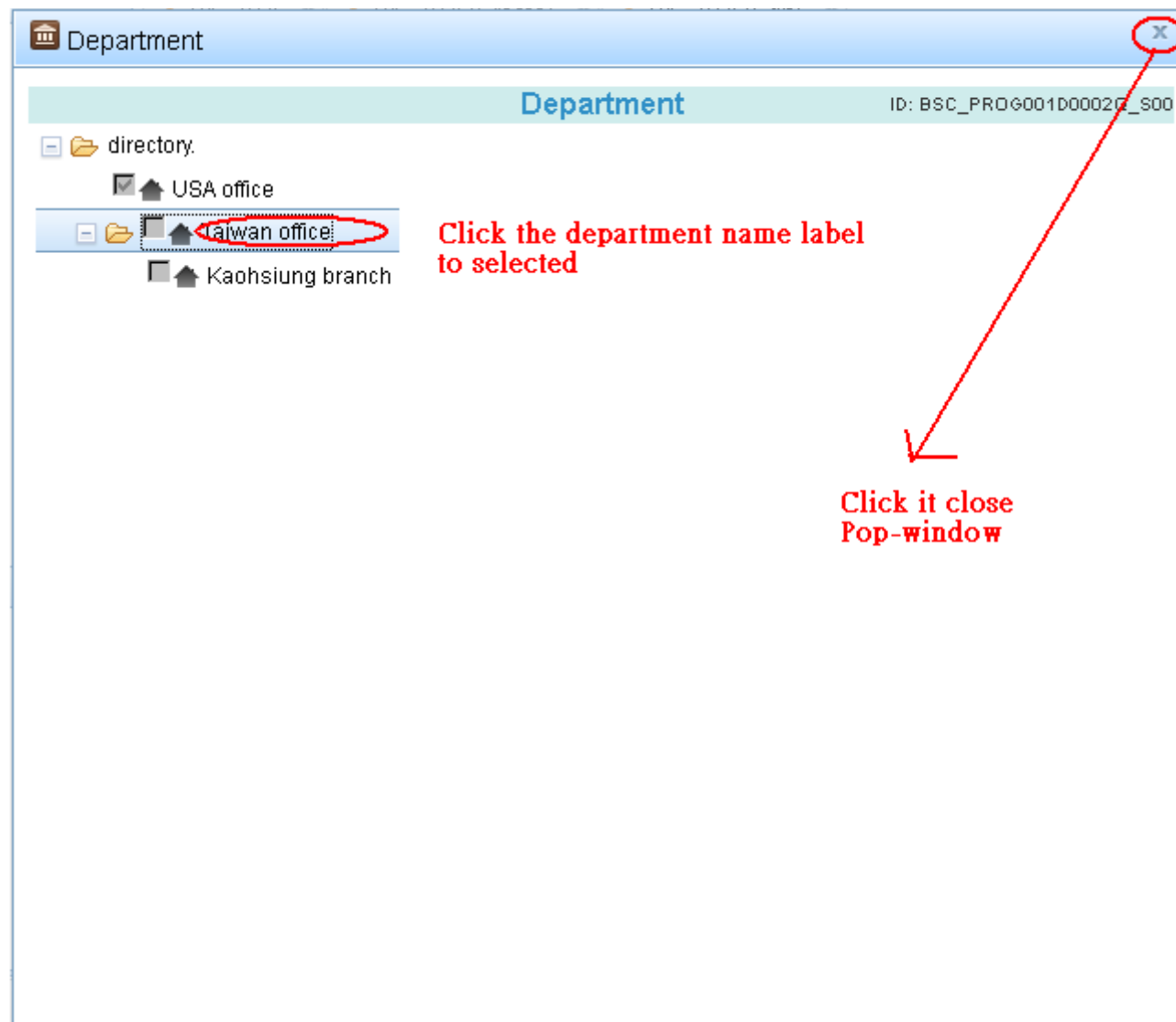


figure 4-02

Employee

EmployeeID: BSC\_PROG001D00001Q\_S00

No: Name:

Query

Clear

total: 2page 1

row size 10

*	Id	Account	Full name	Job title
<input type="checkbox"/>	0001	admin	administrator	MIS
<input checked="" type="checkbox"/>	0002	tester	Test user	Manager

click close icon to hidden Pop-window

figure 4-03



## 5. Measure-data

Data needs regular updates and maintenance , If you do not enter data for measurable KPI, the KPI on the report does not make sense

click “ 05 – Measure data “ . look figure 5-01

1. select an KPI items 2. Settings options 3. Query 4. Save

05 - Measure data

05 - Measure data

ID: BSC\_PROG002D0005Q

▼ KPIs menu

KPIs

Enhance turnover

**Sales**

Investment

Stock market investment fu

Investment projects in deve

Customer

Increase customer

Expanding Asia-Pacific mai

Internal business processes

Upgrade organization

Loss stronghold transform:

Learning and growth

Capacity building objectives

Education and Training

2. Settings options

▼ Options

Measure data for: All

Frequency: Month

Organization: - please select -

Employee: - please select -

3. Query

Query

Clear

Save

5. Save

Sales

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

Formula name:F001 actual + target

2015

January	February	March	April	May	June
T: 100 A: 60	T: A:	T: A:	T: A:	T: A:	T: A:
Juiy	August	September	October	November	December
T: A:			T: A:	T: A:	T: A:

T (Target value) , A (Actual value)

figure 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 ReportID: BSC\_PROG003D0001Q





Options

Vision: - please select -Measure data frequency: Year

Measure data start year: end year: Measure data start date: end date:

Measure data for: Allorganization: - please select -employee: - please select -

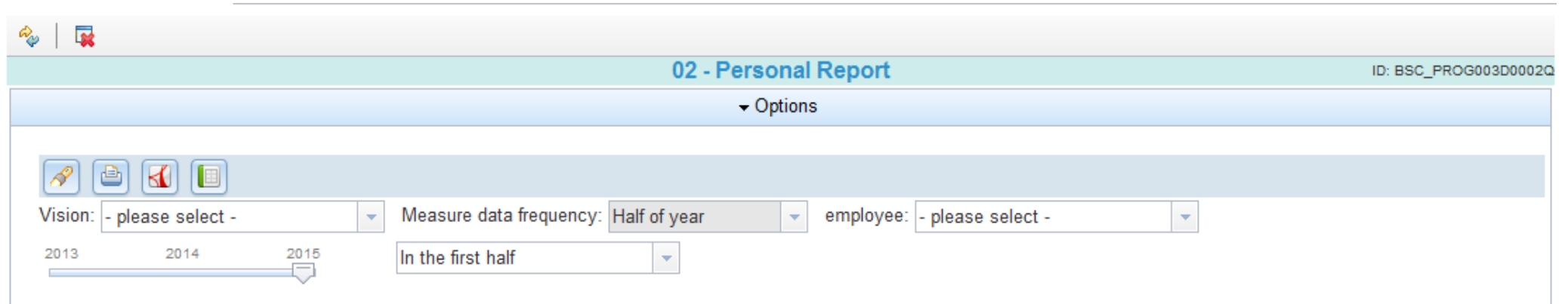
figure 6-01

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: - please select -	Select an Vision
Measure data frequency: Year	Select frequency
start year: end year:	If Frequency is “ Year” , “ Half of year ” , “ Quarter ” , must input start year and end year

start date: <input type="text"/> <input type="button" value="▼"/>	If Frequency is “ Month” , “ Week ” , “ Day “ , must input start day and end day end date: <input type="text"/> <input type="button" value="▼"/>
Measure data for: <input type="text" value="All"/> <input type="button" value="▼"/>	<b>All:</b> Measure data type is non-departmental and non-employee class <b>Organization:</b> Measure data type only for an organization/Department <b>Employee:</b> Measure data type only for an employee
organization: <input type="text" value="- please select -"/> <input type="button" value="▼"/>	If measure data for organization type. Need select the option
employee: <input type="text" value="- please select -"/> <input type="button" value="▼"/>	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



02 - Personal Report ID: BSC\_PROG003D0002Q





Options

Query report content (pencil icon), Export query report as PNG image (image icon), Export query report as PDF file (PDF icon), Export query report as Excel file (Excel icon)

Vision: - please select - Measure data frequency: Half of year employee: - please select -

2013 2014 2015 In the first half

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: - please select -	Select an Vision
Measure data frequency: Half of year	No need select, system auto settings.

employee: <div>- please select -</div>	Select an employee
<div>201320142015</div>	Select report year.
<div>In the first half</div>	<p><b>In the first half:</b> measure-data frequency basic of first half</p> <p><b>In the second half:</b> measure-data frequency basic of second half</p> <p><b>Year:</b> measure-data frequency basic of Year</p>

## 8. Department Report

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

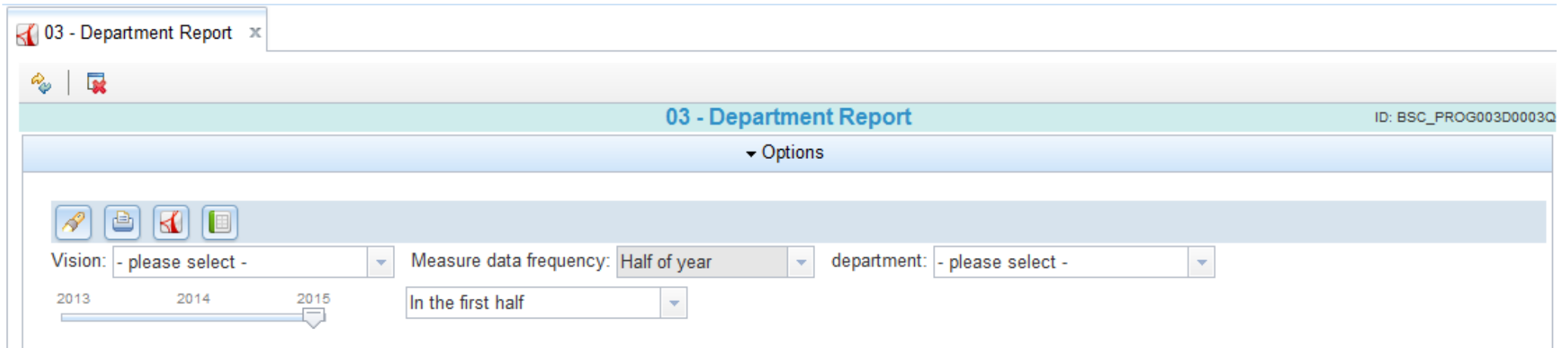







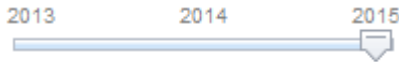



figure 8-01

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: 	Select an Vision
Measure data frequency: 	No need select, system auto settings.
department: 	Select an organization/Department

	Select report year.
	<p><b>In the first half:</b> measure-data frequency basic of first half</p> <p><b>In the second half:</b> measure-data frequency basic of second half</p> <p><b>Year:</b> measure-data frequency basic of Year</p>

## 9. Strategy Map

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

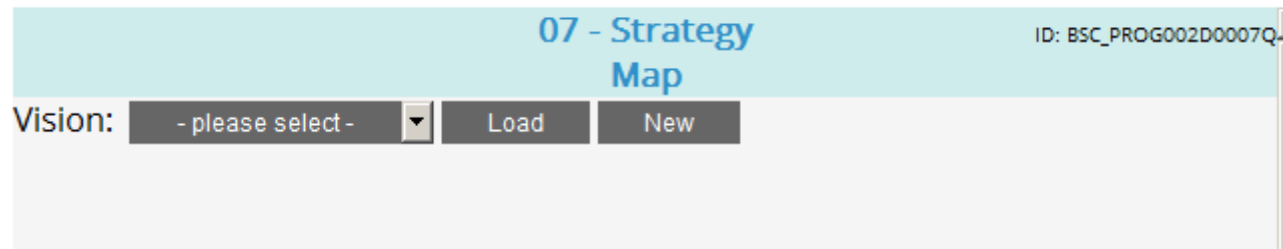


figure 9-01

### ***New strategy map:***

Vision: - please select - 1. select an Vision

New 2. click New

3. strategy-map will load the Vision's objectives on MAP. Look figure 9-02

Save 4. Save click

### ***Load history strategy map:***

Vision: - please select - 1. select an Vision

Load 2. click Load



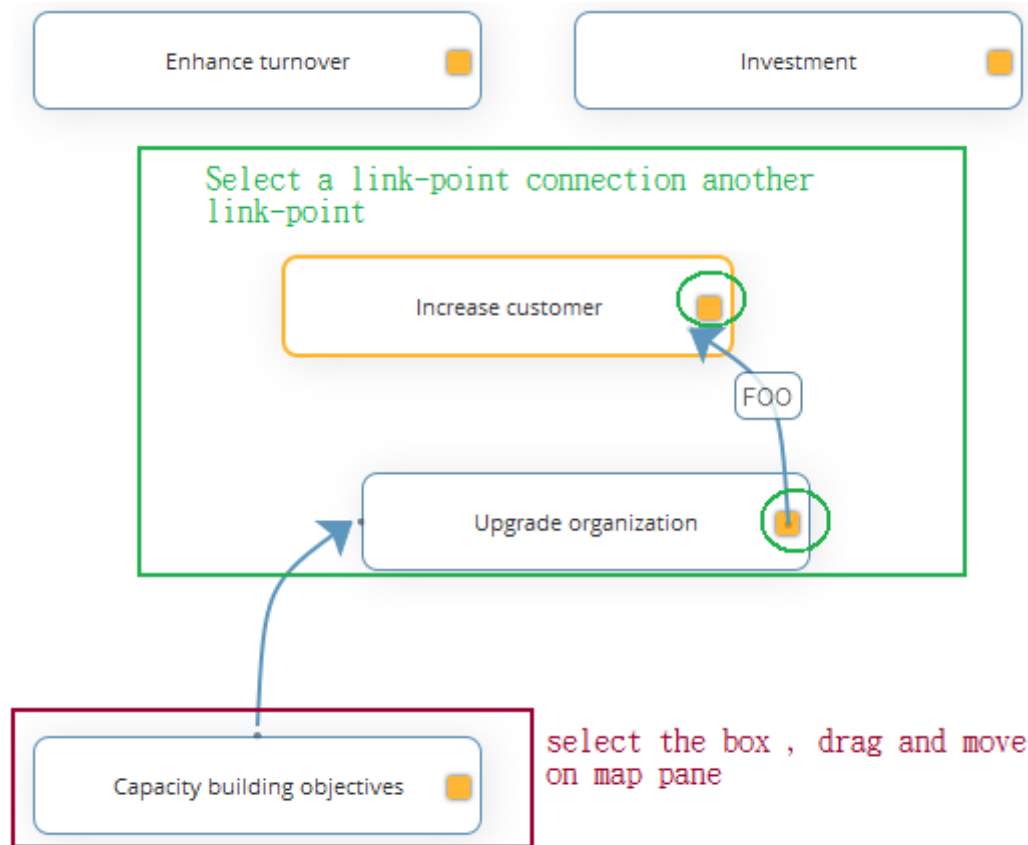


figure 9-02

## 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

08 - SWOT
ID: BSC\_PROG002D0008Q





▼ Options

Vision:

Organization:



	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<b>Financial</b>	新屋是一個靠海的鄉鎮，位處於桃園縣的西南邊。沿著縣道，走在新屋的路上，映入眼簾的盡是綠波蕩漾的稻田，辛勤的農家們，正在勤勞的耕種著，在現代的都會生活中，還保留著珍貴的農村風貌。而事實上，新屋鄉是全台最大的農業鄉鎮，所產的稻米，更是全國重要的供應來源。	standard language!  Click edit icon  on Text box to edit memo	TEST	
<b>Customer</b>	der Großen Koalition	発達中の低気圧の影響で北日本を中心に風や雪が強まっています。	QQQ	

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 data-bbox="188 467 533 515" type="text" value="- please select -"/>	Select an Vision
Organization: <input data-bbox="237 574 533 622" type="text" value="Taiwan office"/>	Select an department/Organization

11. Report signature

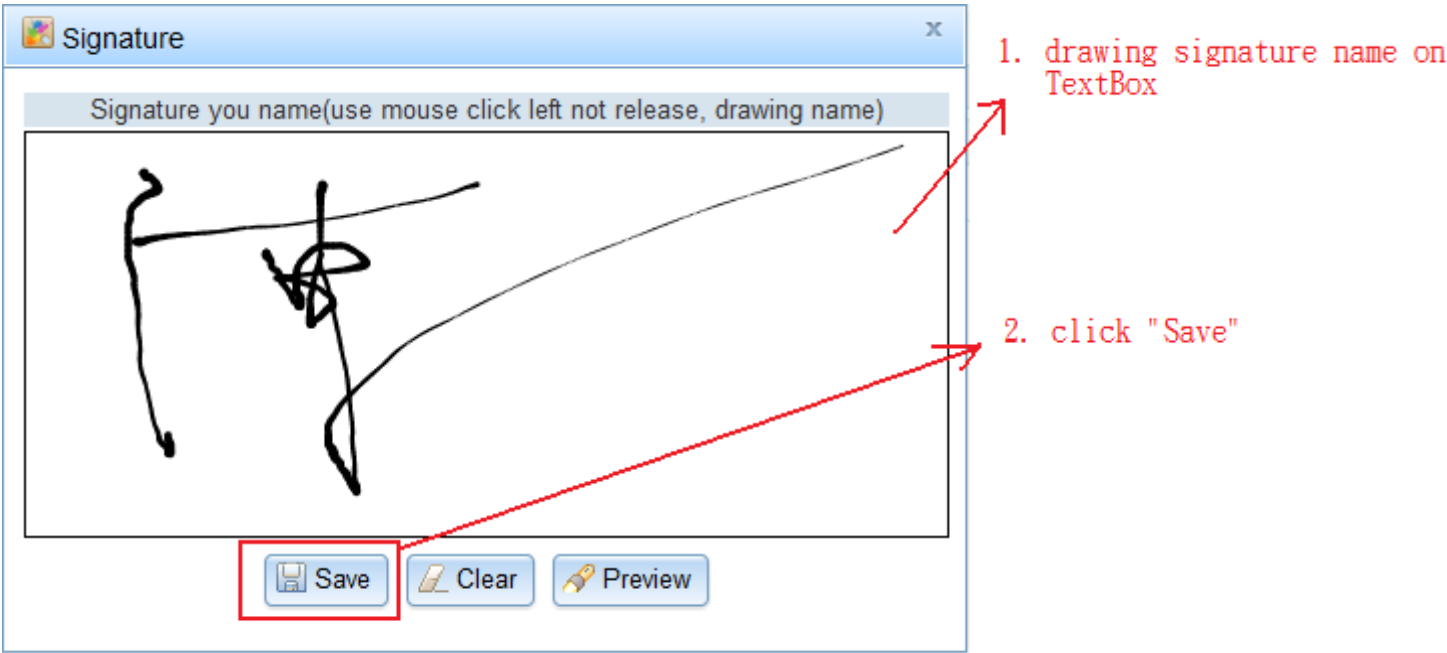
Managers signature on the report for “01 – KPI Report” / “02 – Personal Report” / “03 – Department Report” . Only export **Excel** or **PDF** found signature picture.

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 )

\*Name:

description:

Mapper Label:  Mapper Value:

#	Label Field	Value Field
✖	NAME	ACTUAL
✖	NAME	TARGET

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
 Save query	Save query expression to history data.
 Clear	Clear
 Delete	Delete history data.
History: <input type="text" value="KPIs 2015 year Actual value."/> 	Select history data.
Datasource: <input type="text" value="BBCORE01 - datasource-01"/> 	Select datasource.
Name: <input type="text" value="KPIs 2015 year Actual value."/>	input query name when need Save query
Mapper: <input type="text" value="KPIs actual mapper - 01"/> 	Select mapped item for query Charts
Mapper items(for Pie charts): <input type="text" value="- please select -"/> 	Select mapped items for Pie charts
Query expression:	input SQL query expression



The is Area Charts example.

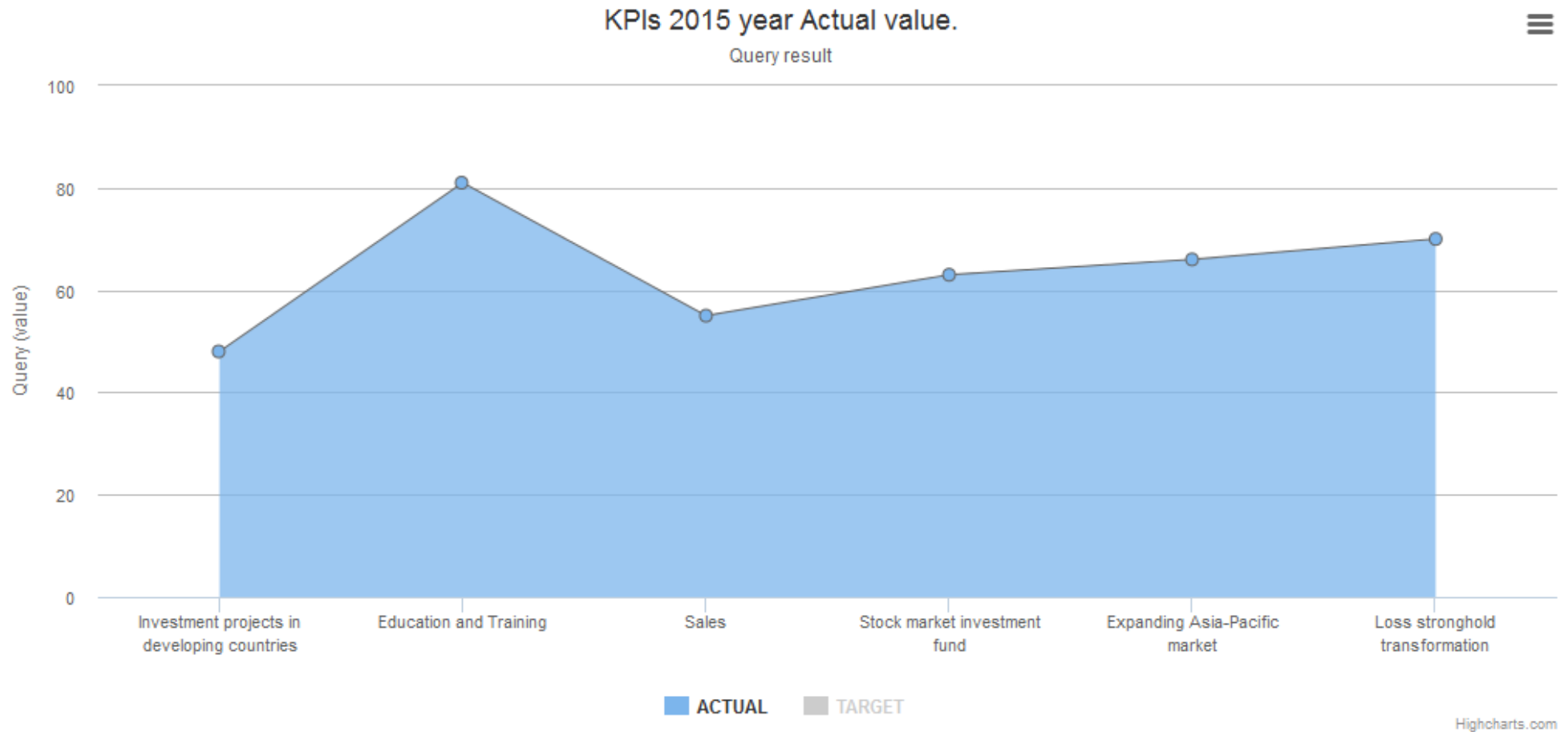


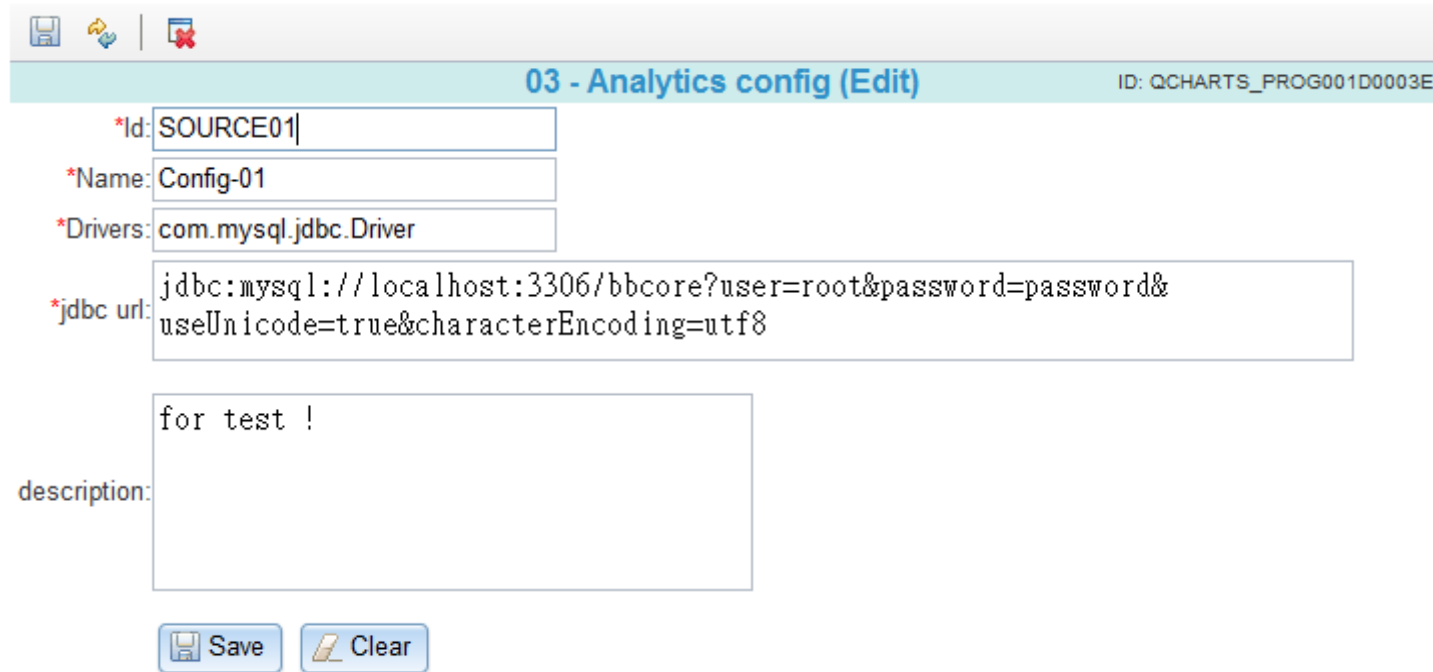
Figure 12-03

### 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 ) .



03 - Analytics config (Edit) ID: QCHARTS\_PROG001D0003E

\*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 !

Save 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/) (

<http://sourceforge.net/projects/mondrian/files/schema%20workbench/>) now vision is 3.9.0 , use workbench create catalog example ( figure 13-02 )

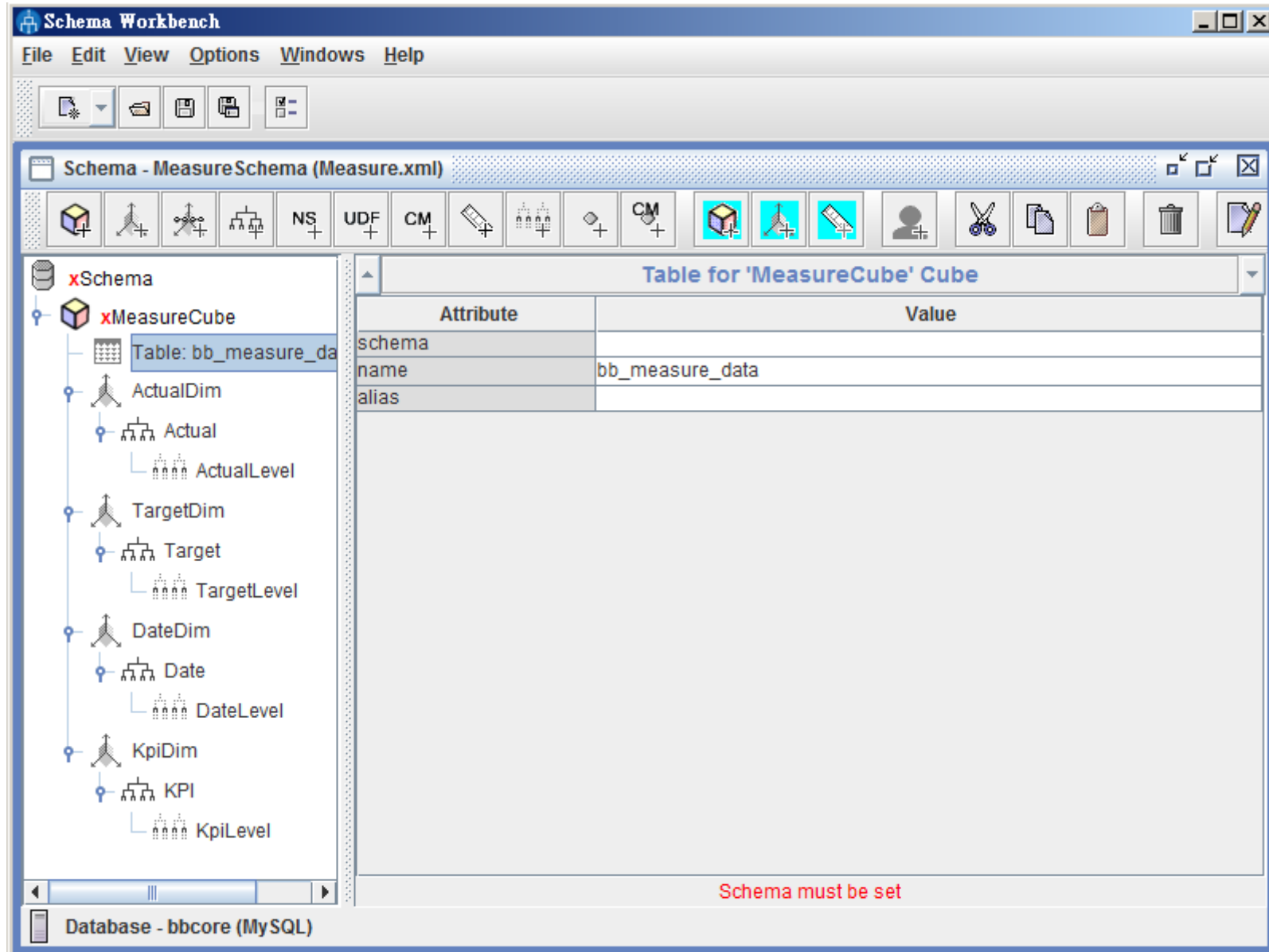


figure 13 - 02

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

The screenshot shows a web form titled "04 - Analytics Catalog (Create)" with a sub-header "ID: QCHARTS\_PROG001D0004A". The form contains the following elements:

- \*Id:
- \*Name:
- \*Mondrian Catalog:  not Yet upload files!
- description:
- Save  Clear

A red box highlights the folder icon button next to the "\*Mondrian Catalog:" label. A red arrow points from this box to a text box that says "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 )

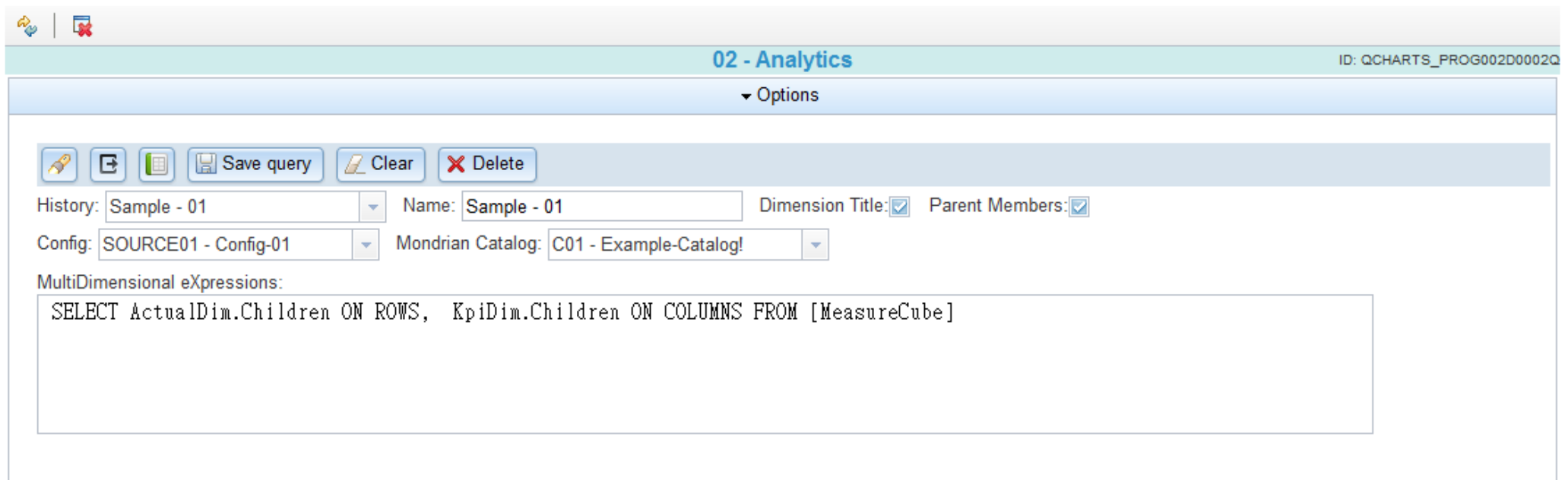


figure 13 – 04

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

<div> <div>✖ Delete</div> </div>	Delete current select history data.
History: <div> <div>Sample - 01</div> <div>▼</div> </div>	Select history data.
Name: <div> <div>Sample - 01</div> </div>	Query name.
Dimension Title: <div> <div><input checked="" type="checkbox"/></div> </div>	Check show Title.
Parent Members: <div> <div><input checked="" type="checkbox"/></div> </div>	Check show members.
Config: <div> <div>SOURCE01 - Config-01</div> <div>▼</div> </div>	Select OLAP datasource config.
Mondrian Catalog: <div> <div>C01 - Example-Catalog!</div> <div>▼</div> </div>	Select OLAP catalog config.
<div> <div>MultiDimensional eXpressions:</div> <div> <div>SELECT ActualDim.Children ON</div> </div> </div>	input MDX query string.

## 14. bambooBSC mobile version

### 14-1. Mobile web.

Provide scorecard query for a mobile-device browser.

The screenshot displays the bambooBSC mobile web interface. On the left is the 'options pane' containing the bambooBSC logo, a 'Frequency:' dropdown menu set to 'Year', and two date input fields for 'Measure-data begin date' and 'Measure-data end date', both containing '06/26/2015'. A red text label 'This is options pane' is at the bottom of this pane. On the right is the 'main pane', which is mostly empty with a red text label 'This is main pane' in the center. At the top of the main pane is a navigation bar with three buttons: 'Logout' (with a close icon), 'Refresh / Query' (with a refresh icon), and 'Options' (with a settings icon).

**Logout:** click to logout.

**Refresh / Query:** click to query new scorecard

**Options:** click show options pane, to settings measure-data begin/end date range and frequency.

**When re-setting measure-data start / end date or frequency, you must re-click Query / refresh button**

## 14-2. Mobile web base operation

× Logout ↻ Refresh / Query ⚙ Options

**Example vision** Perspectives: 4  
Objectives: 5  
KPI: 6

Score: 68.06  
Percentage: 68 %

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

copy from: <http://www.coca-colacompany.com/our-company/mission-vision-values>



**Our Mission**

Our Roadmap starts with our mission, which is enduring. It declares our purpose as a company and serves as the standard

× Logout ↻ Refresh / Query ⚙ Options

**Example vision**

**Financial**  
Target: 100  
Min: 50  
Weight: 25 %  
Score: 55.25  
Percentage: 55 %

description:

**Customer**  
Target: 100  
Min: 70  
Weight: 25 %  
Score: 66  
Percentage: 66 %

description:

Click title pane to show next scorecard

Click child item title pane go to parent scorecard



×

Logout

↻ Refresh / Query

⚙ Options

Objectives : Enhance turnover

Sales

Target: 50

Min: 10

Weight: 100 %

Management: Bigger is better

Calculation: Average

Unit: %

Formula: F001 actual ÷ target

Score: 55

Percentage: 110 %

description:  
aa bb

The last step to be no sub-project of the KPIs.

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

01 - PDCA Project x

bamboobsc

01 - PDCA Project

Title:

Date range:

Start

End

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	

click to create new project.

\*Title:

input project title

Save

Clear

Click this Tab to create PDCA project items.


Content





Plan / Do / Check / Action




\*Date range:

Start   End  

^ 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):



click to pick Department.

\*Responsibility (Employee):



Click to pick Employee.

\*KPIs:



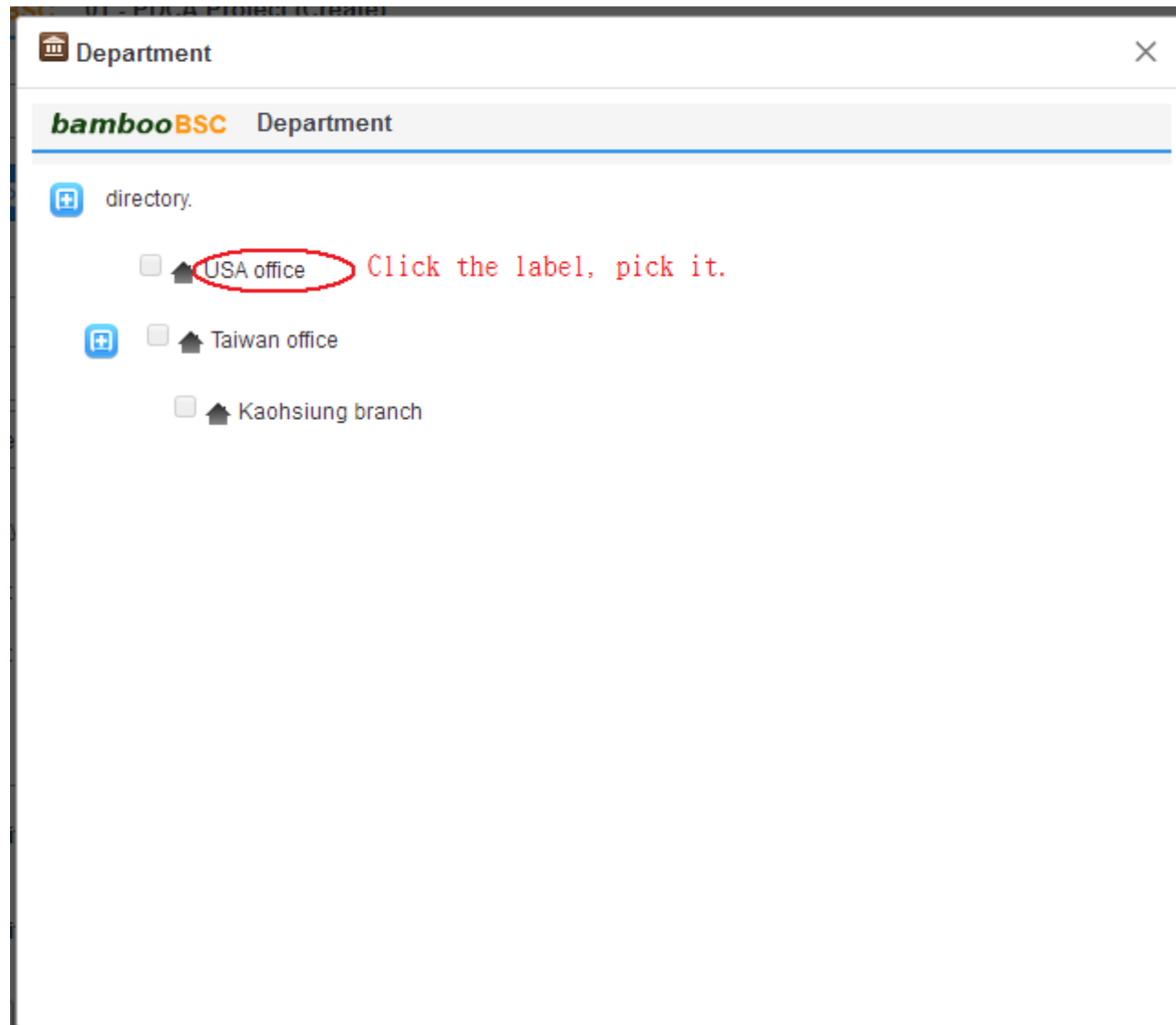
Click to pick KPIs.

Description:


Document / attachment:



PDCA Project department pick.



PDCA Project owner/Employee pick.

 Employee ×

**bambooBSC** Employee

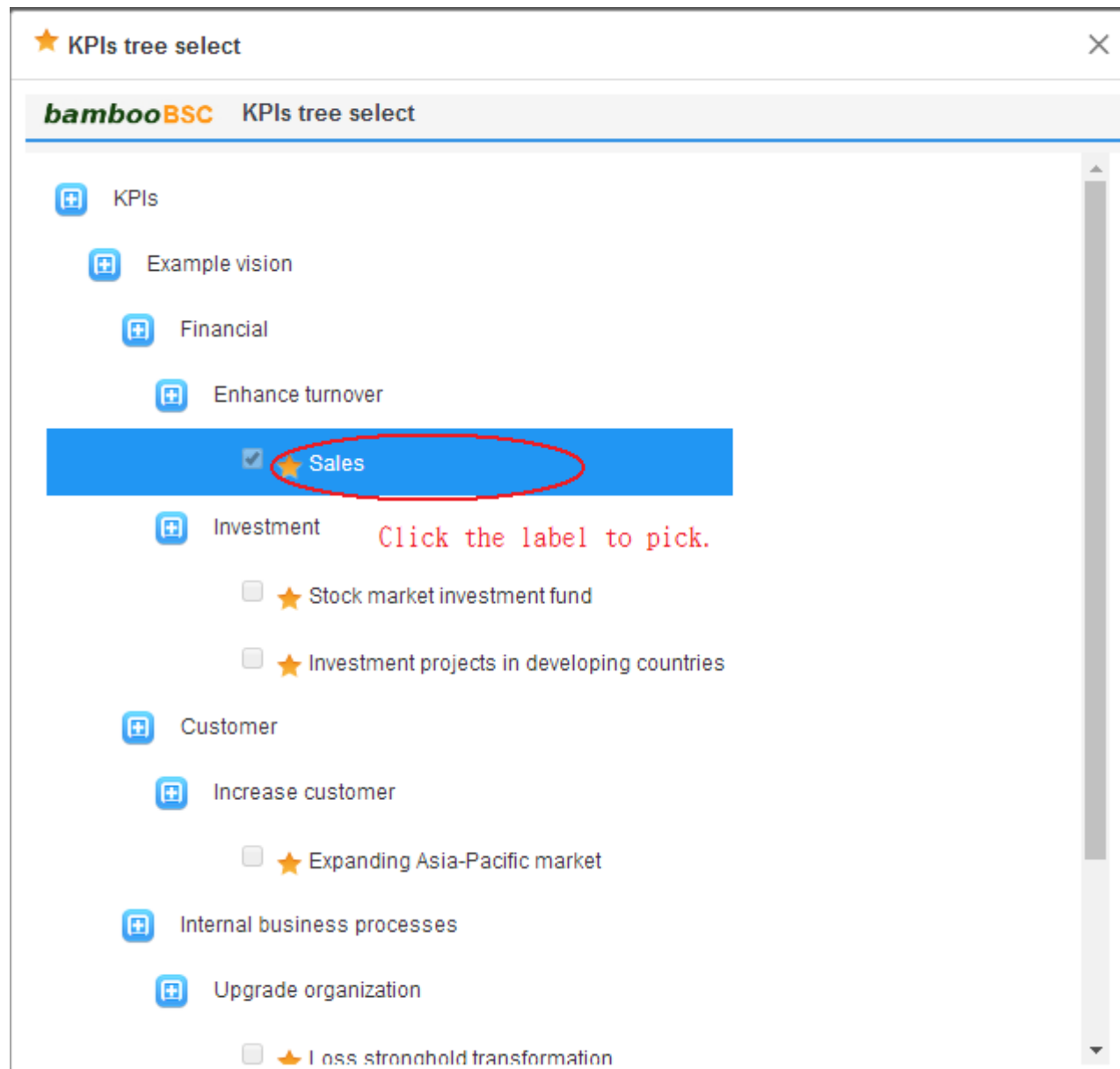
Employee serial-number:  Name:

total: 4    < <    page 1 / 1    > >    row size 10

*	Id	Account	Full name	Job title
<input 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



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:

Start 2016/04/01



End 2016/04/30



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.









Add

Click Add button to add this item.





*	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



01 - PDCA Project x 01 - PDCA Project (Create) x 01 - PDCA Project (Edit) x

**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:  
☐

Save Clear

Click Confirm audit button

this checkbox only final step can check

\*Title:

測試專案-(New)-(New)-(New)

Save

Clear

Start apply

Confirm audit

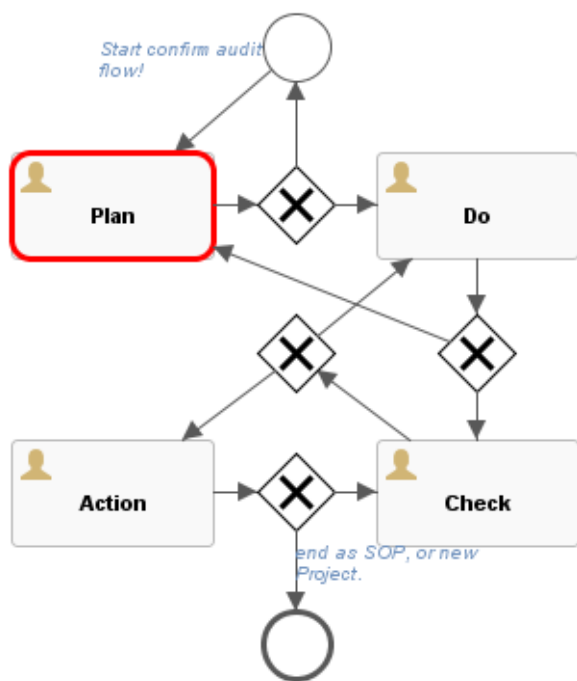
View audit diagram

Click View audit diagram button, can to view audit step.


Current audit info

View content | 01 - PDCA Project (Edit)




bambooBSC View content



## PDCA Report

 02 - PDCA Report

Options

PDCA Project: 測試專案-(New)-(New) BSC Report: ☐   

Show HTML report.

Download Excel(xlsx) report.

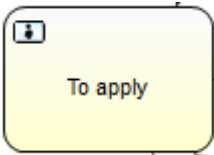

if has checked "BSC Report"  
will download ZIP file. please unzip the file.

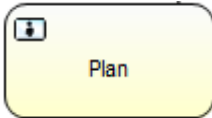
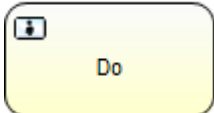
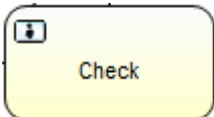
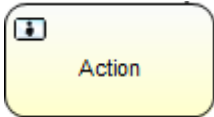
Show project parent/child.

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