bambooBSC 0.6

bambooBSC Guide

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Project site: https://github.com/billchen198318/bamboobsc

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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:

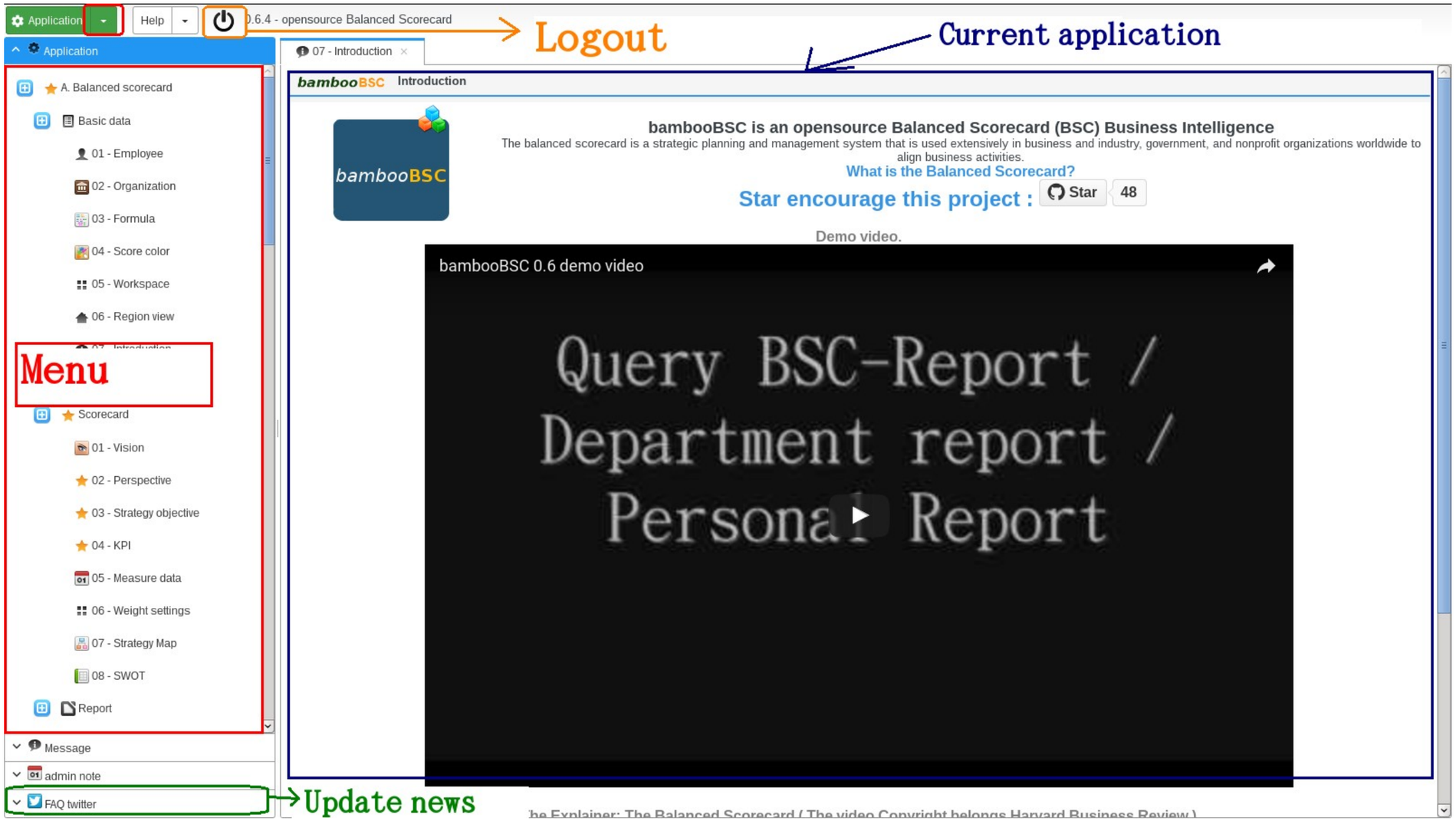
Establish and maintain scorecards information or maintenance KPI measure data . And Strategy Map

Report:

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

Basic Operations

Please look figure-A .



Step sourcecard established

How to build scorecard data , Reference Videos : https://www.youtube.com/watch?v=N5BsWZL8bxQ

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

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 masure-data will not be calculated KPI performance scores .

1. Vision

First click " 01 – Vision " item on menu or tree menu. Look figure 1-01, 1-02

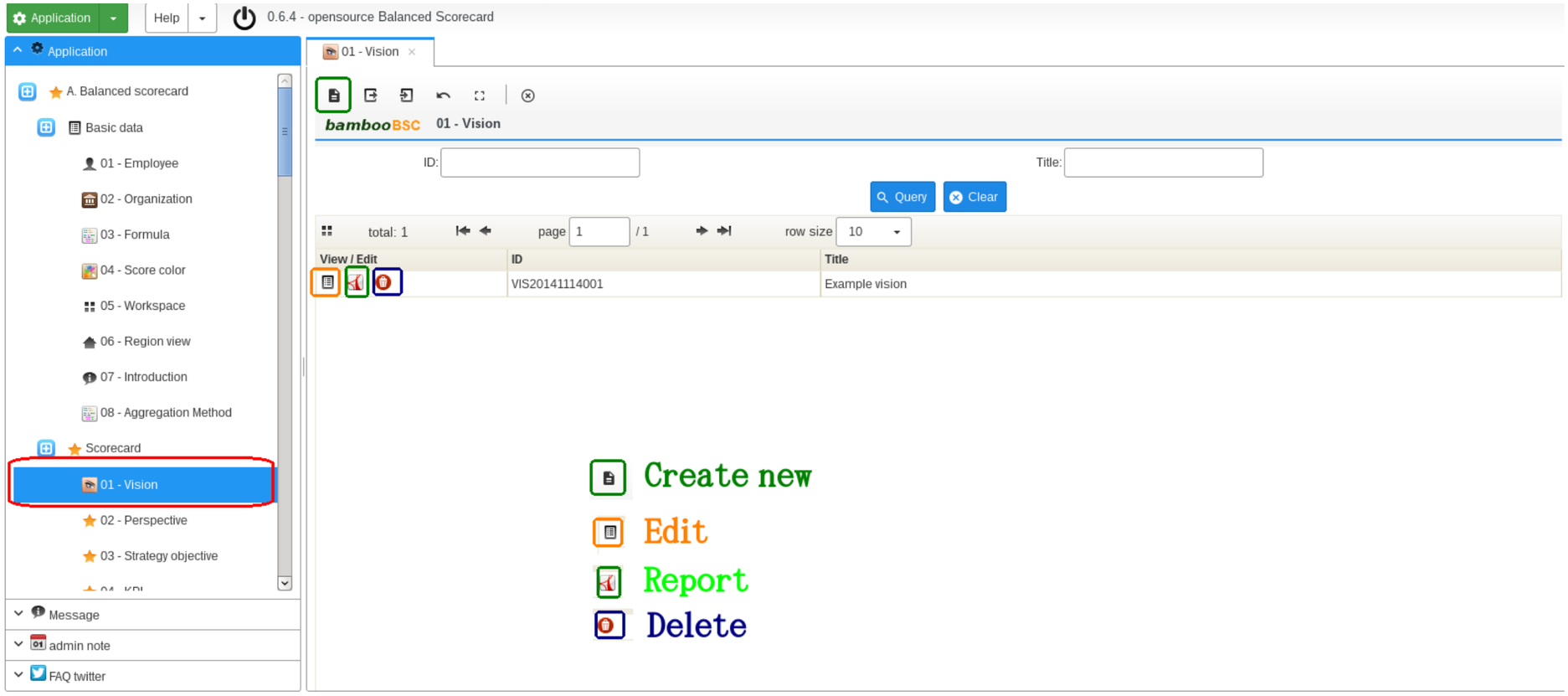


figure 1-01

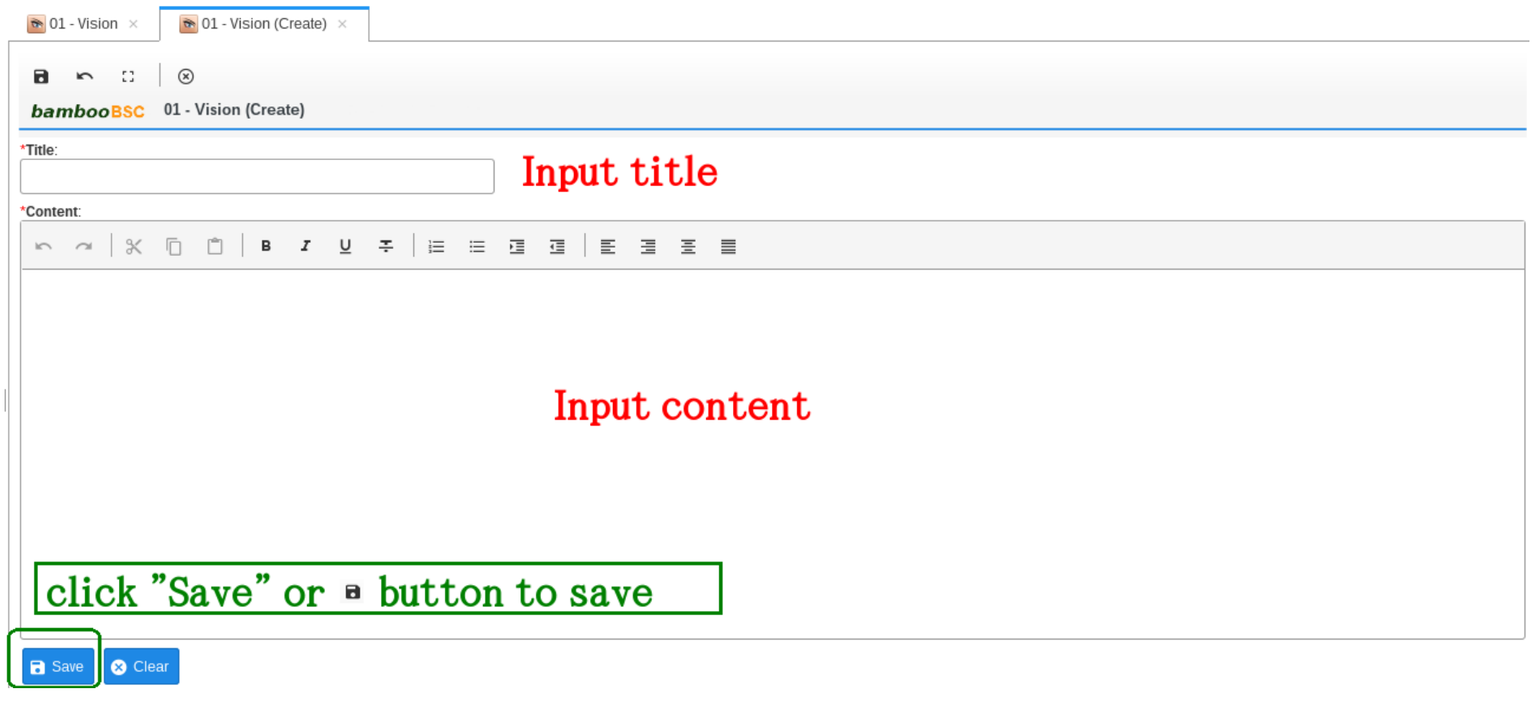


figure 1-02

2. Perspectives

Click " 02 – Perspective " item on menu or tree menu. Look figure 2-01 , 2-02

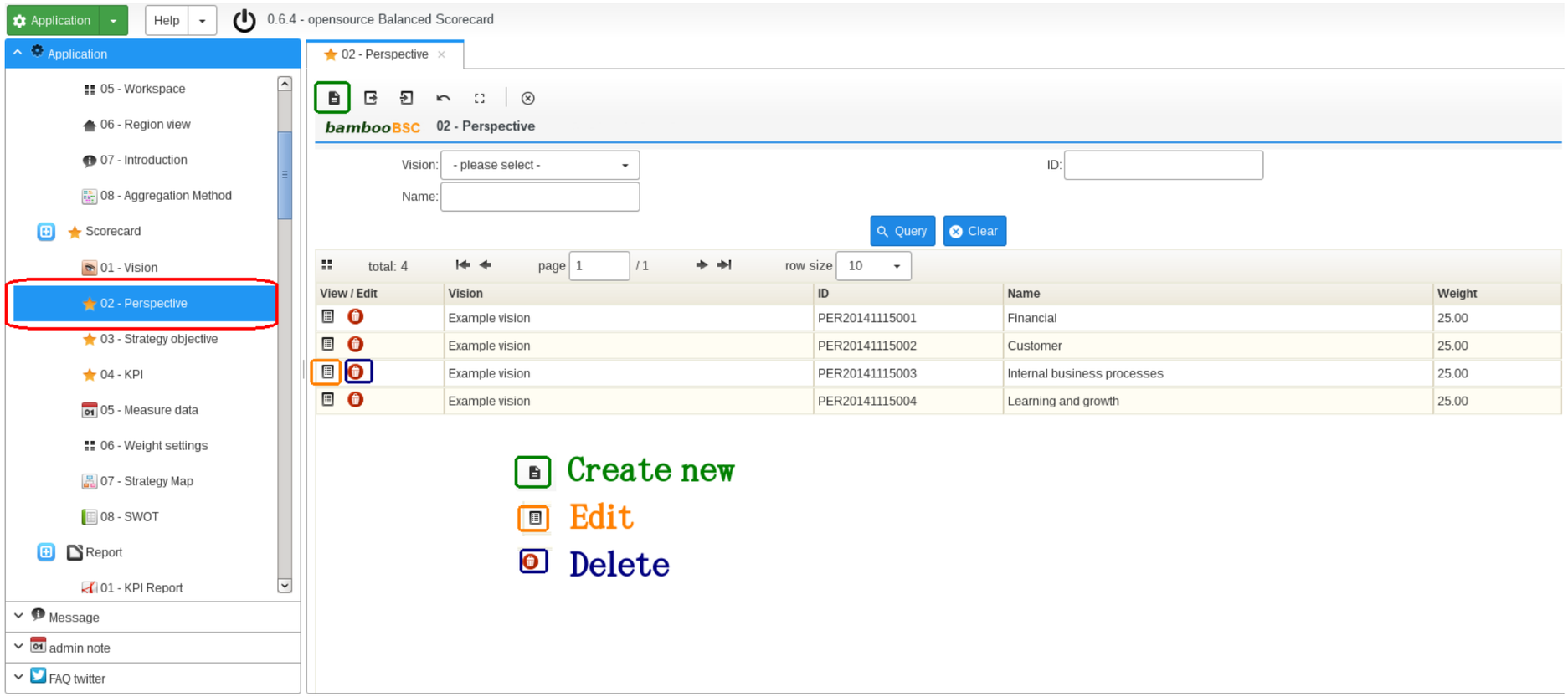


figure 2-01

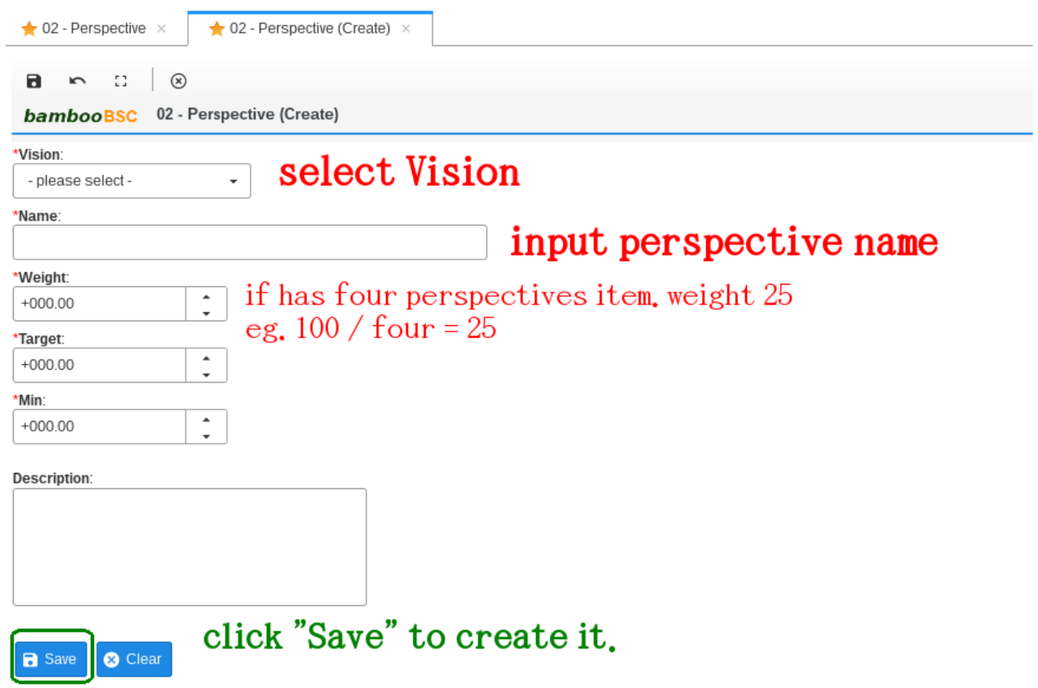


figure 2-02

3. Strategy objective

Click " 03 – Strategy objective " item on menu or tree menu. look figure 3-01, 3-02

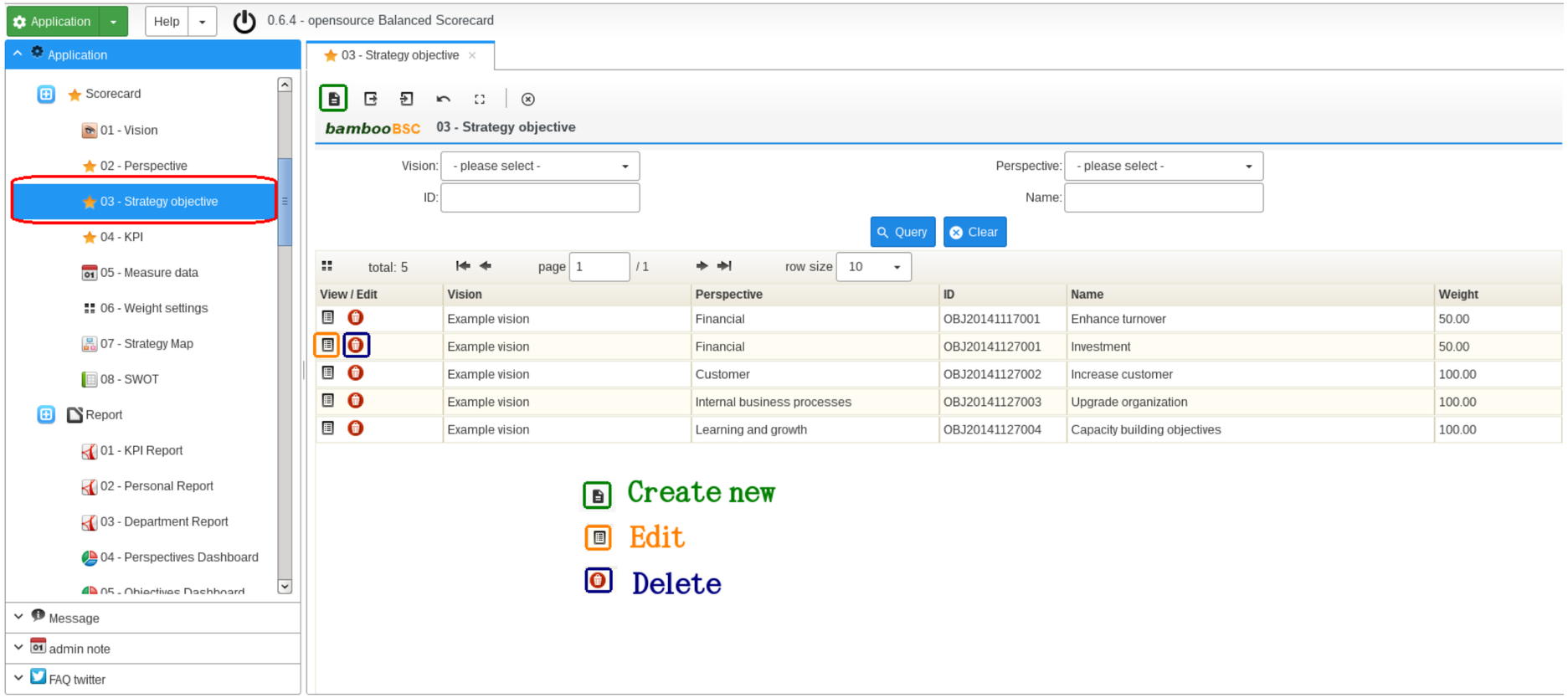


figure 3-01

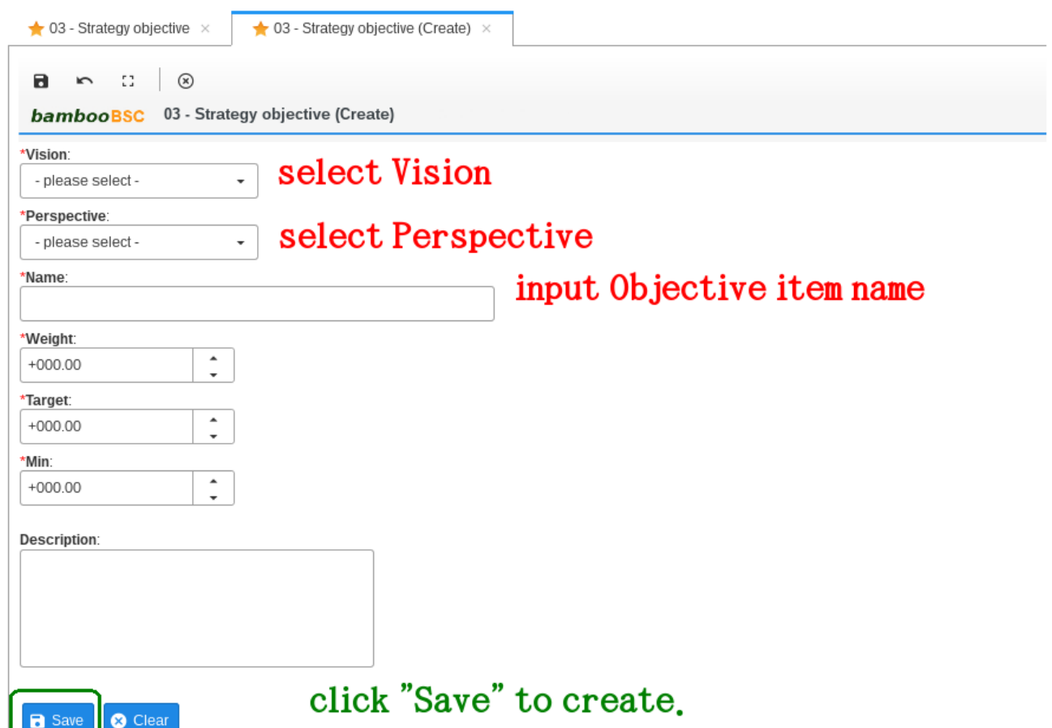


figure 3-02

4. KPI

Click " 04 – KPI " item on menu or tree menu. look figure 4-01, 4-02

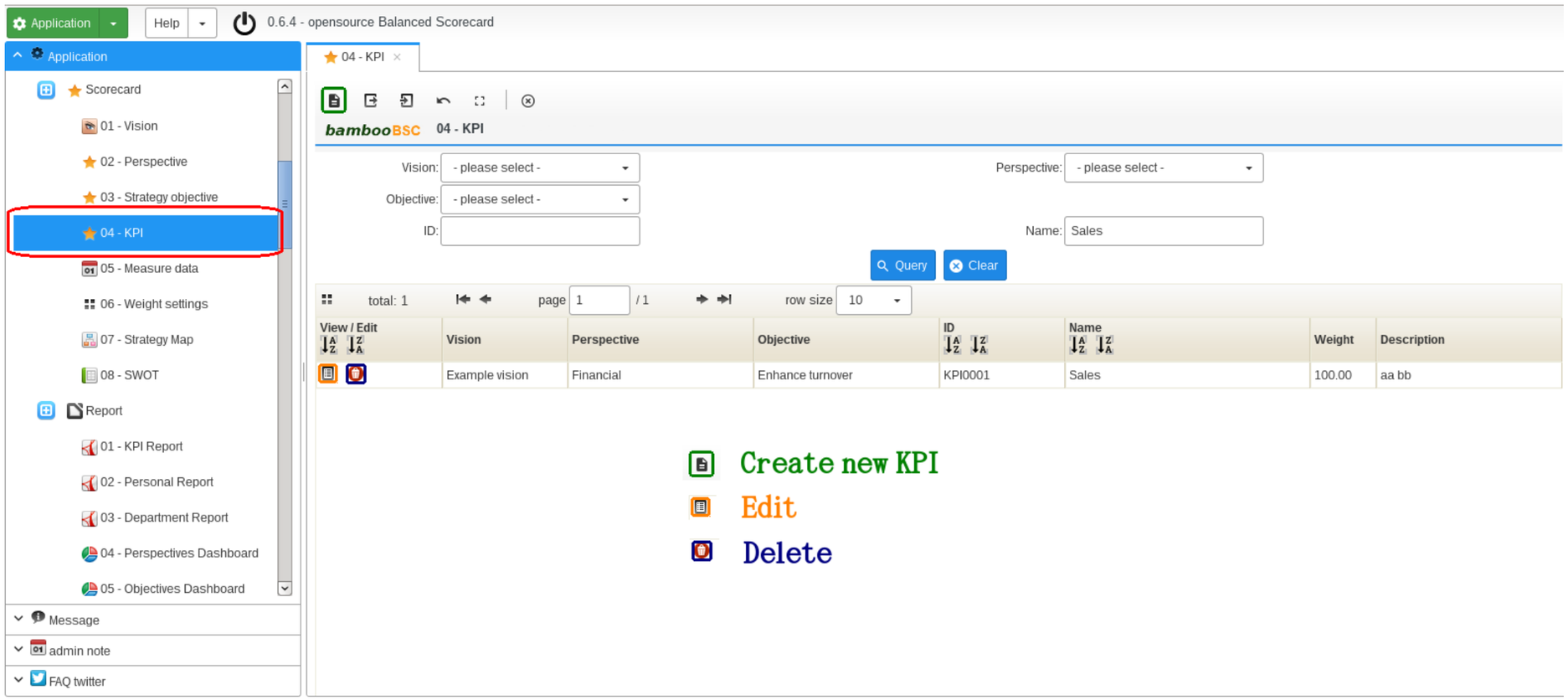


figure 4-01

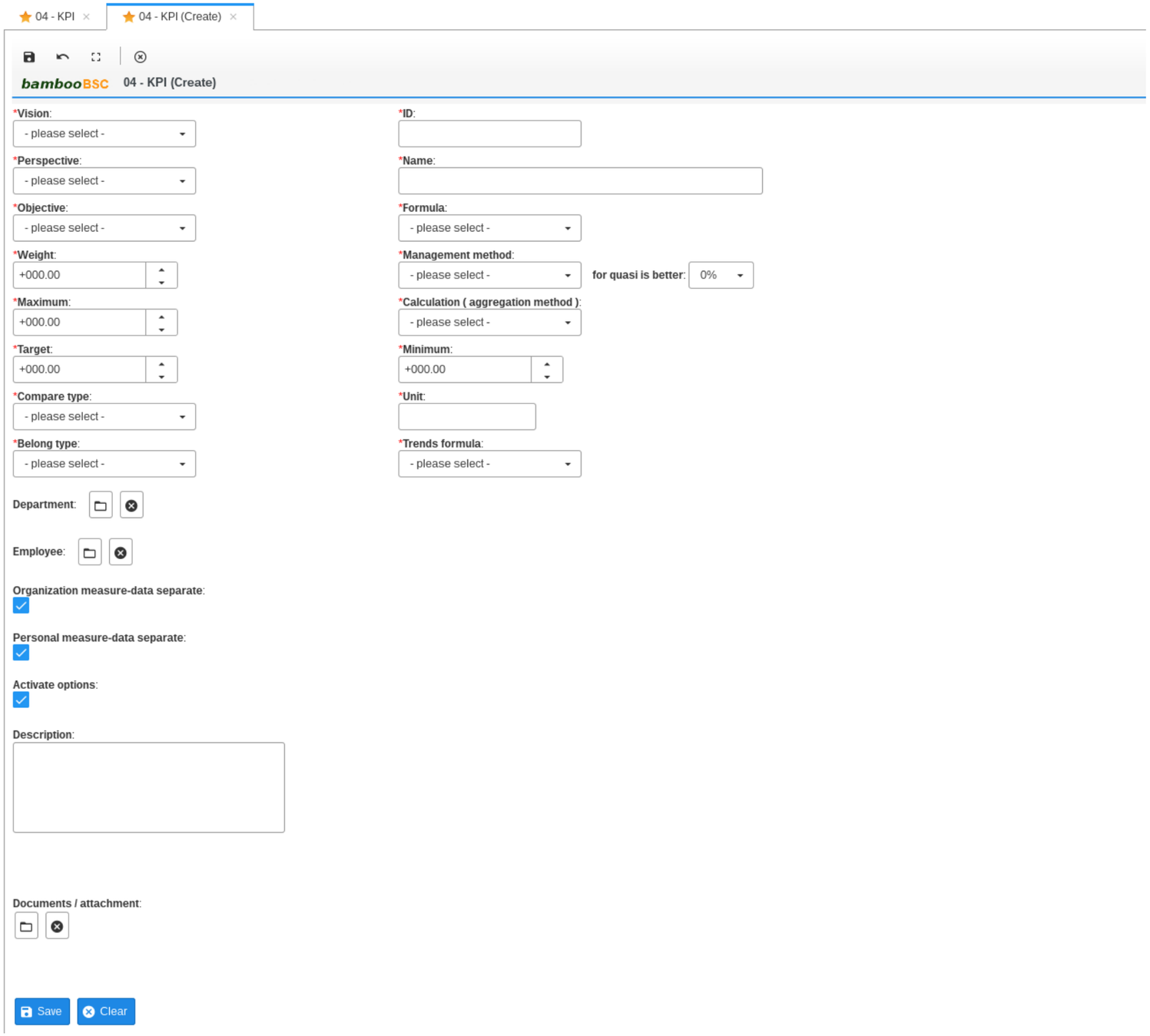

04 - KPI
04 - KPI (Create)
bambooBSC 04 - KPI (Create)
*Vision:
- please select -
*ID:
*Perspective:
- please select -
*Name:
*Objective:
- please select -
*Formula:
- please select -
*Weight:
+000.00
*Management method:
- please select -
for quasi is better:
0%
*Maximum:
+000.00
*Calculation (aggregation method):
- please select -
*Target:
+000.00
*Minimum:
+000.00
*Compare type:
- please select -
*Unit:
*Belong type:
- please select -
*Trends formula:
- please select -
Department:
Employee:
Organization measure-data separate:
Personal measure-data separate:
Activate options:
Description:
Documents / attachment:
Save
Clear

figure 4-02

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**”

Trends formula: trends formula, only for **07 - KPI Period Trends** **report** calculation score need.

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

Maximum: max value, need input value big over then target field.

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 (eg: %, USD, TWD, million, piece ….)

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

Calculation (aggregation method): Average , Total , Max , Min… , maintain of **08 - Aggregation Method** (It will affect the calculation of scores)

Examples the KPI have TWO measure-data and Calculation is Average

A. 2014 measure-data score is 50

B. 2015 measure-data score is 80

range 2014 ~ 2015

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

Belong type: recommend select “**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

Organization measure-data separate: recommend is checked / enable

Personal measure-data separate: recommend is checked / enable

Activate options: recommend is checked / enable, if no-checked disable will no show the KPI item of Report.

description: memo or explain

Documents / attachment: can upload attachment files.

Department pick

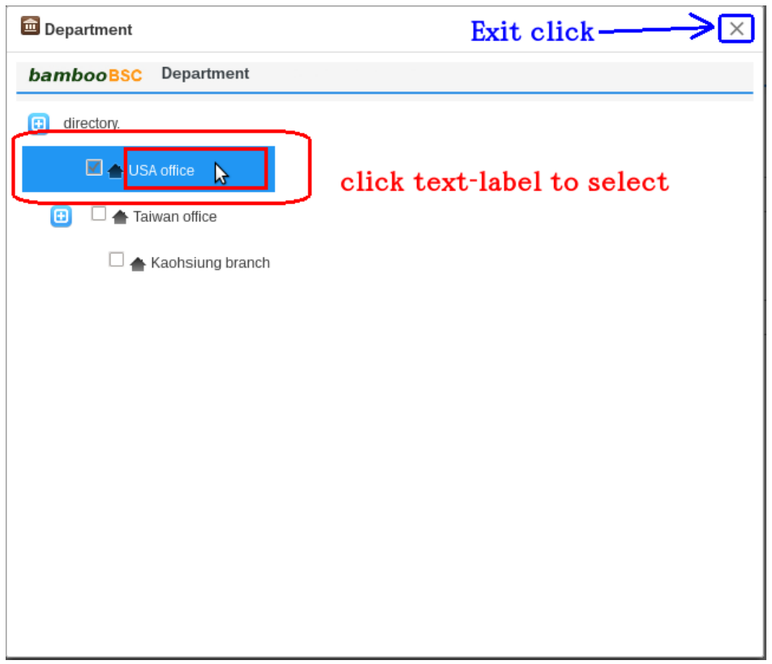


Figure 4-03

Employee pick

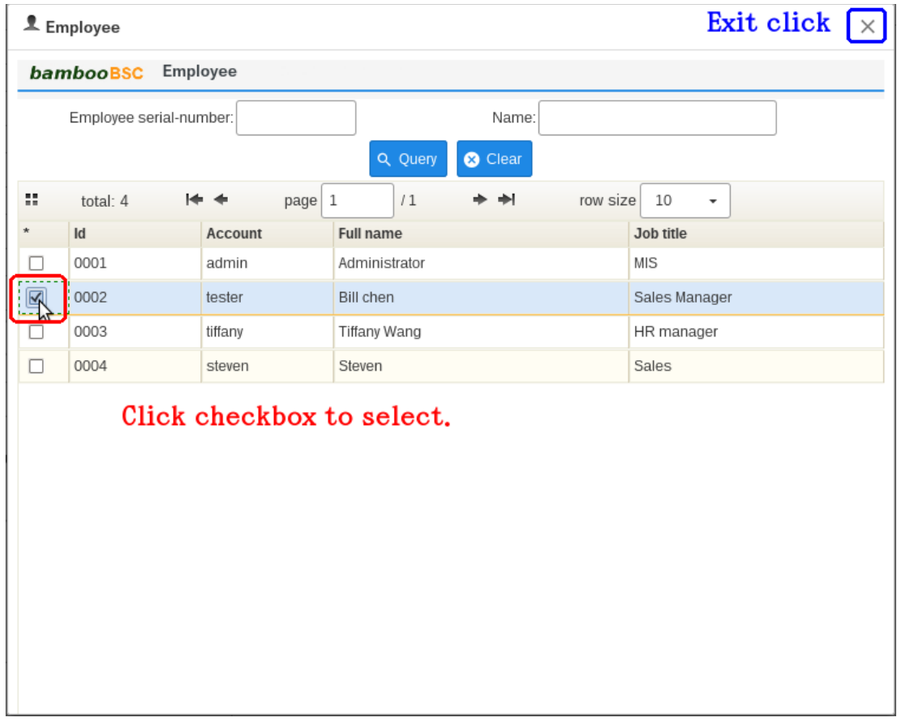


figure 4-04

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** and **Query**
3. input measure-data field, click **Save** to update

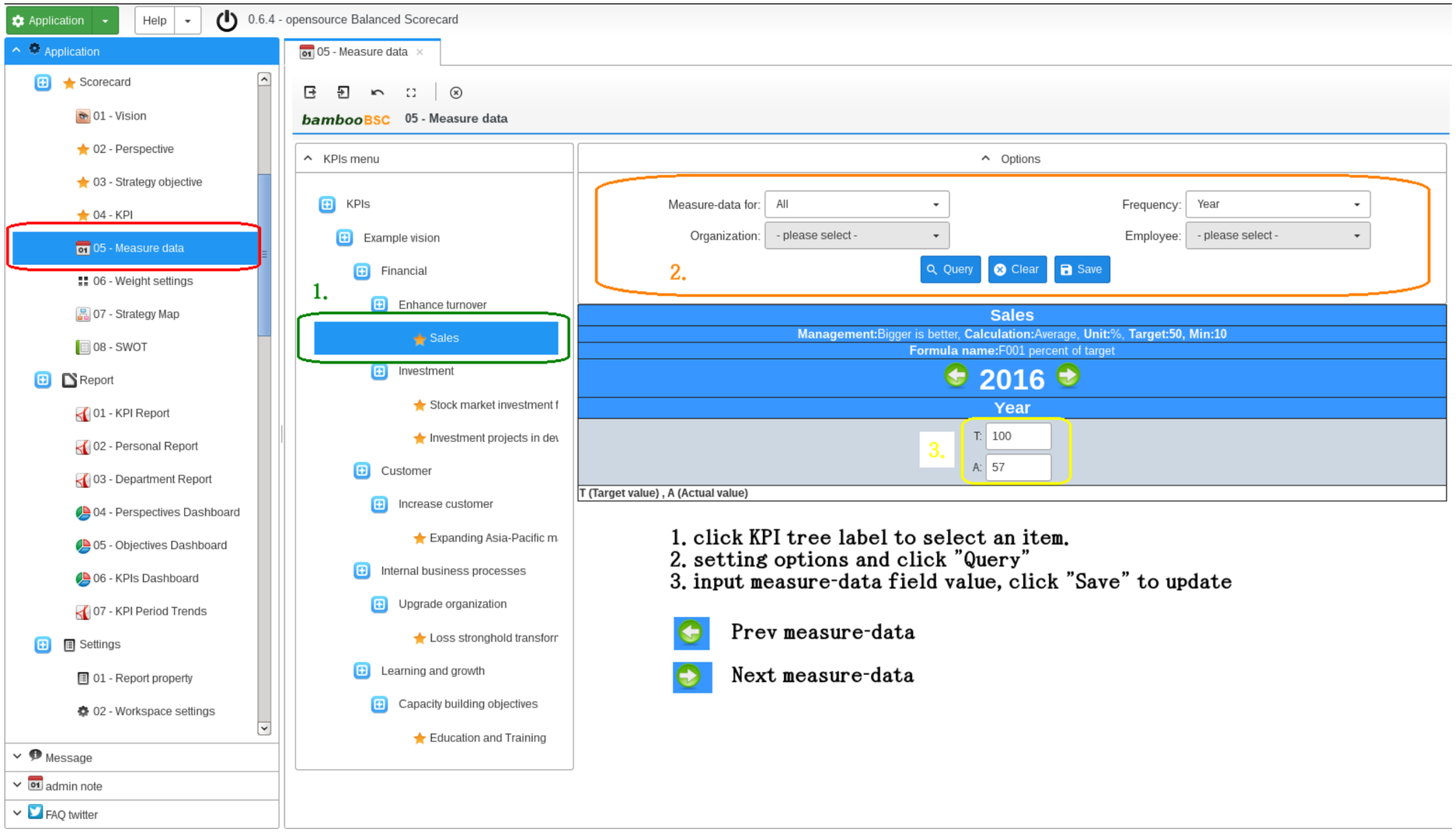


figure 5-01

6. KPI Report

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

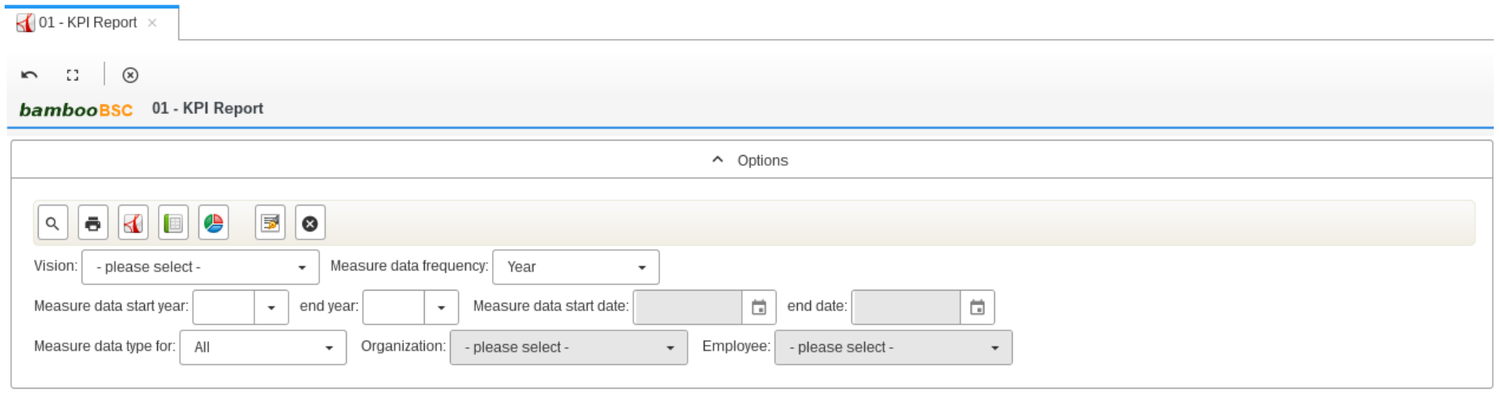
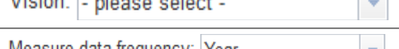
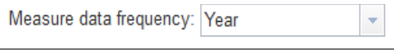
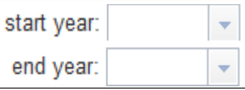
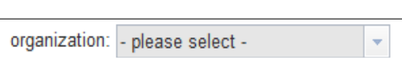


figure 6-01

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)
	Select an Vision
	Select frequency
	If Frequency is “ Year” , “ Half of year ” , “ Quarter ” , must input start year and end year
	If Frequency is “ Month” , “ Week ” , “ Day “ , must input start day and end day
	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
	If measure data for organization type. Need select the option
	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

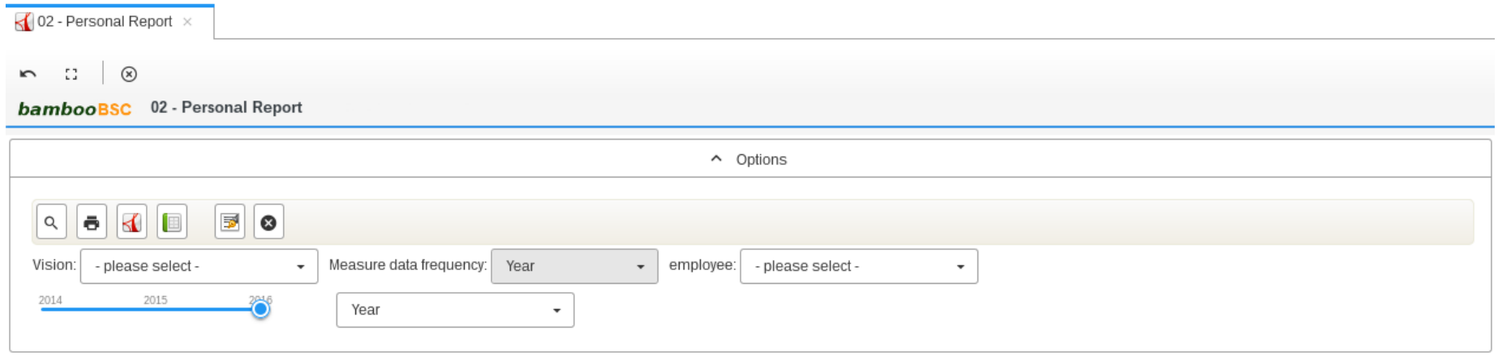
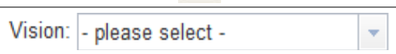
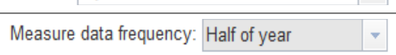
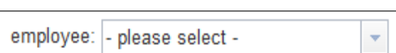
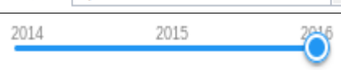


figure 7-01

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)
	Select an Vision
	No need select, system auto settings.
	Select an employee
	Select report year.
	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

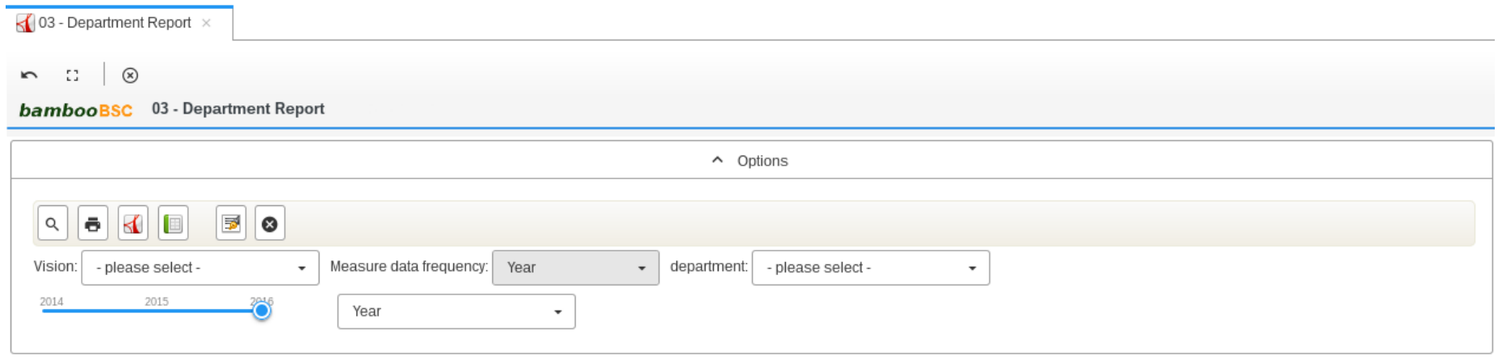


figure 08-001

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)
	Select an Vision
	No need select, system auto settings.
	Select an organization/Department
	Select report year.
	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

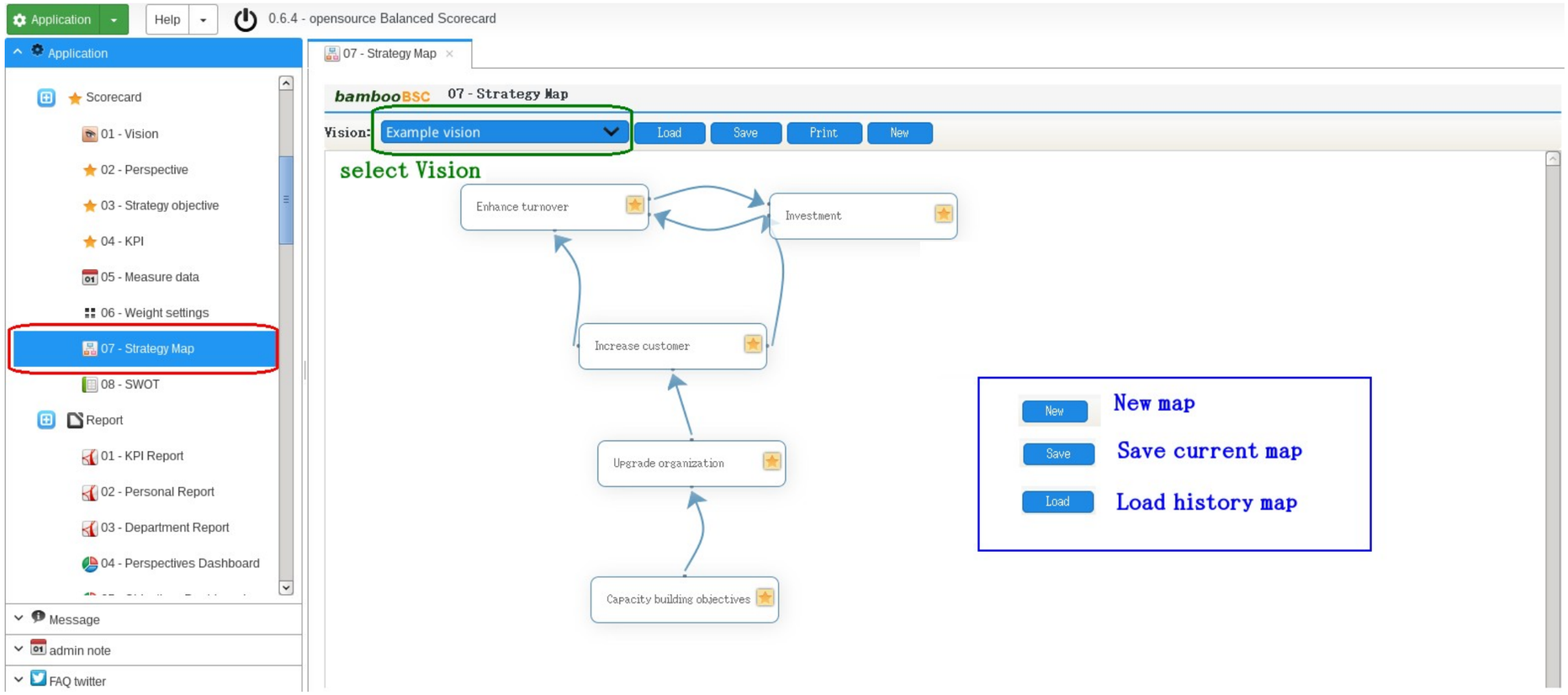
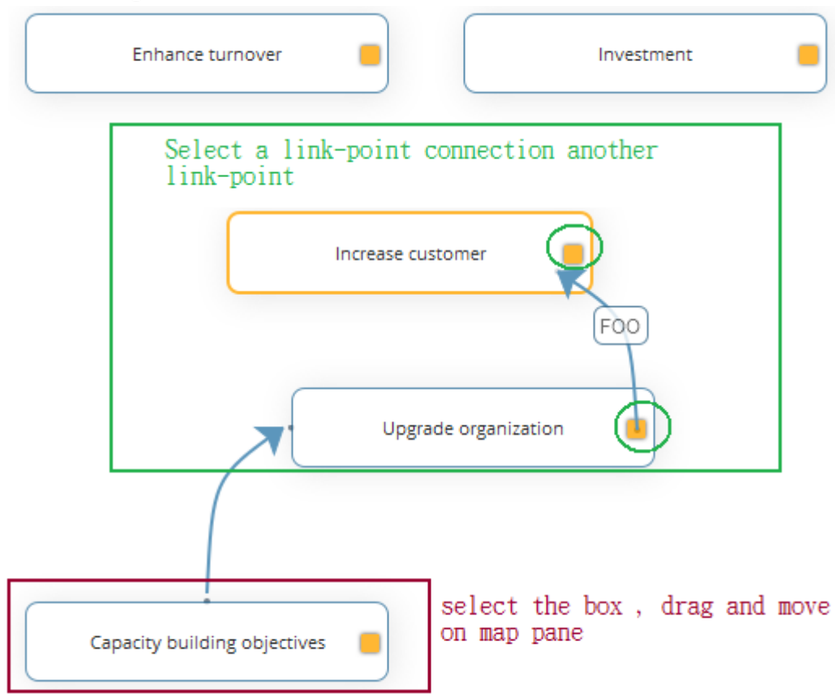


figure 9-01

How to drag Line on MAP



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

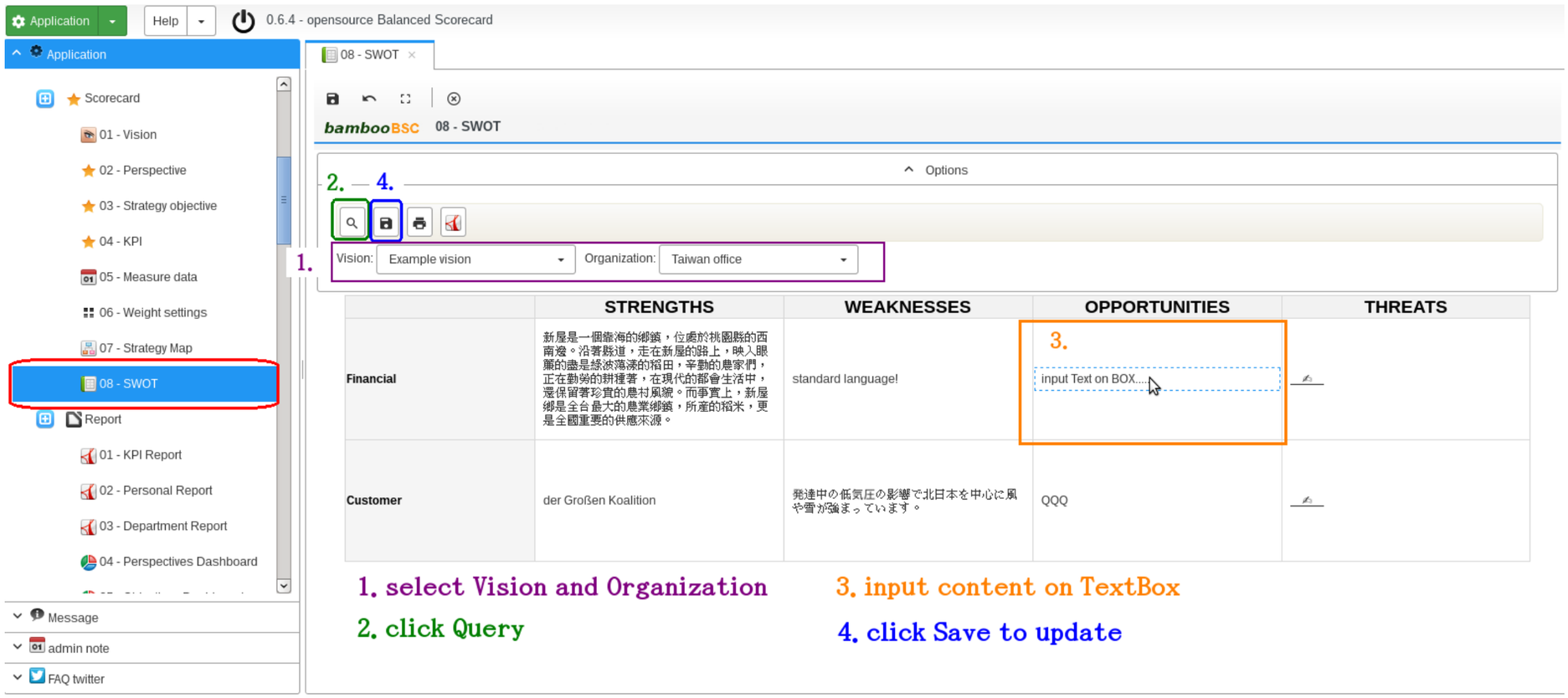
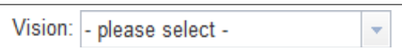
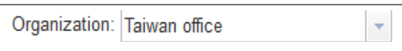


figure 10-01

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)
	Select an Vision
	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

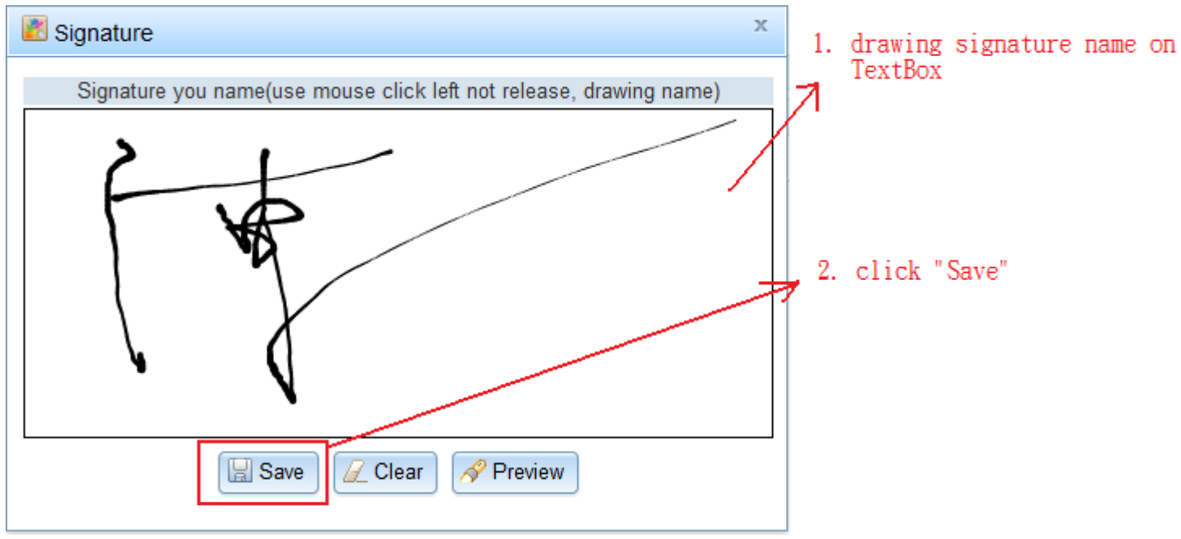


figure 11-01

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

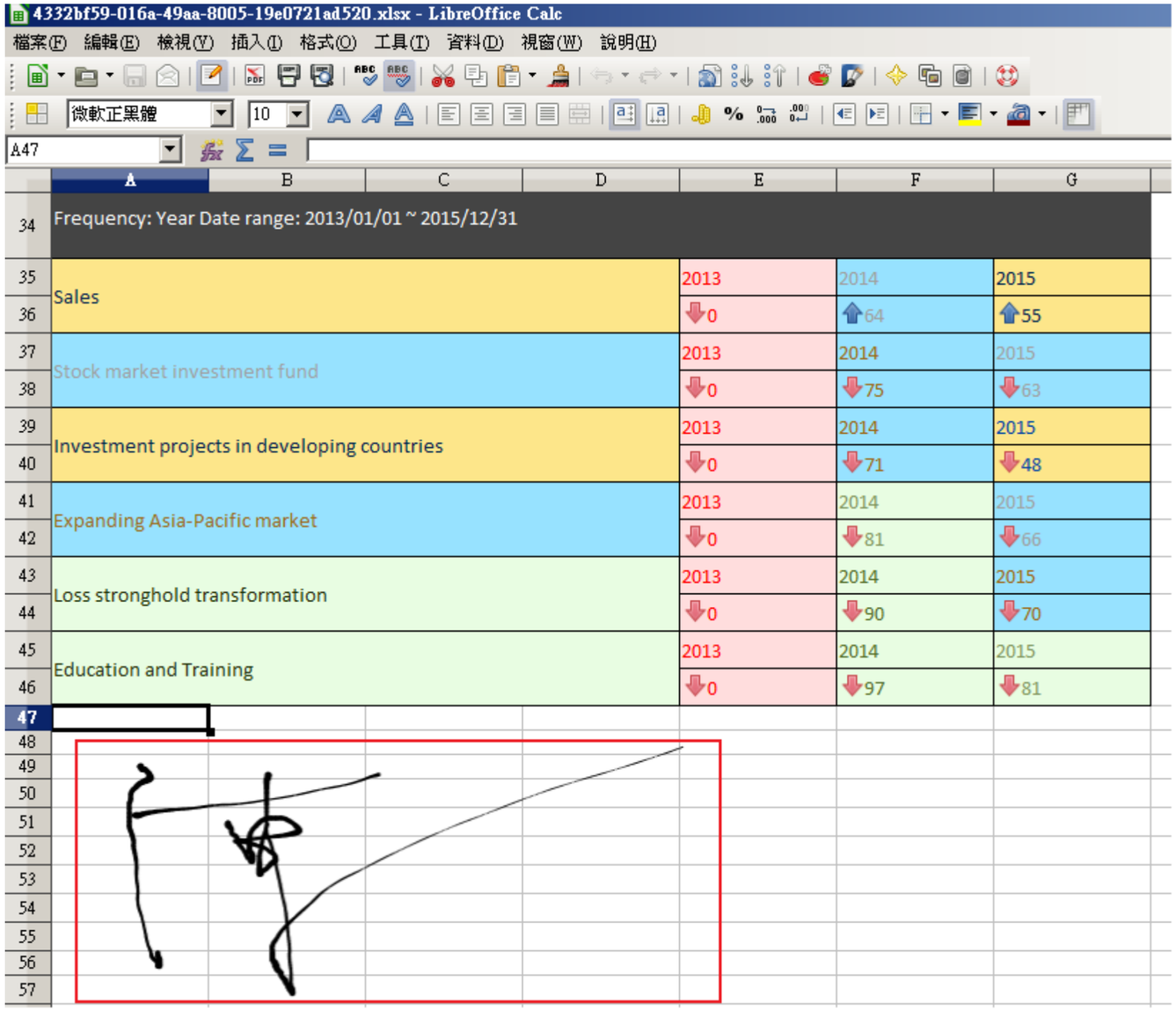


figure 11-02

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)

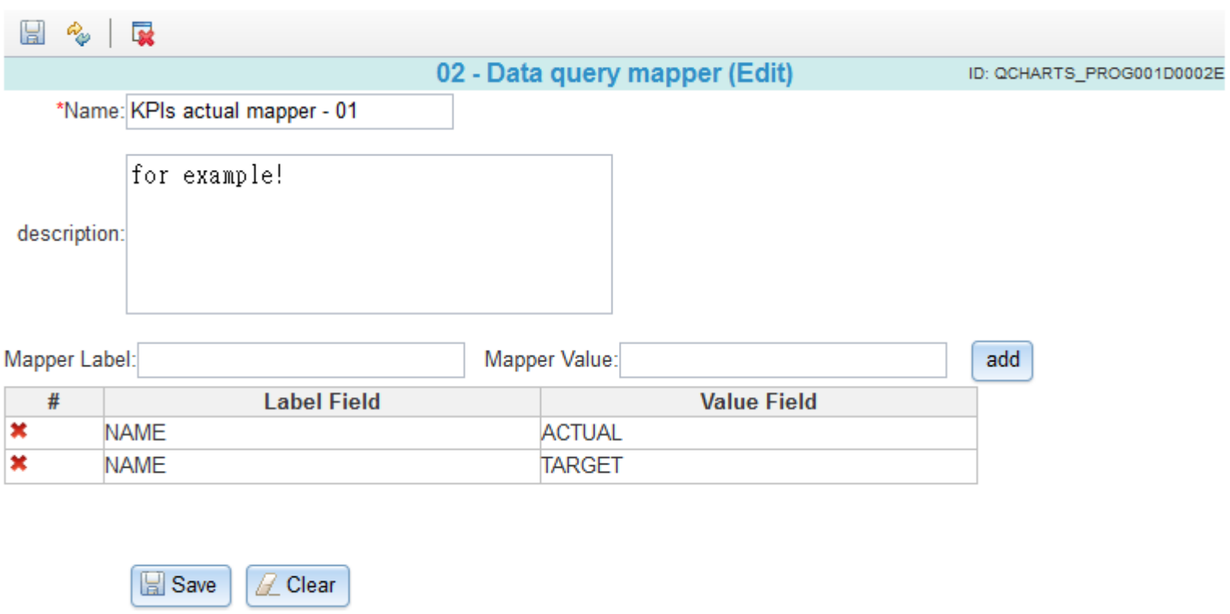


figure 12 - 01

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)

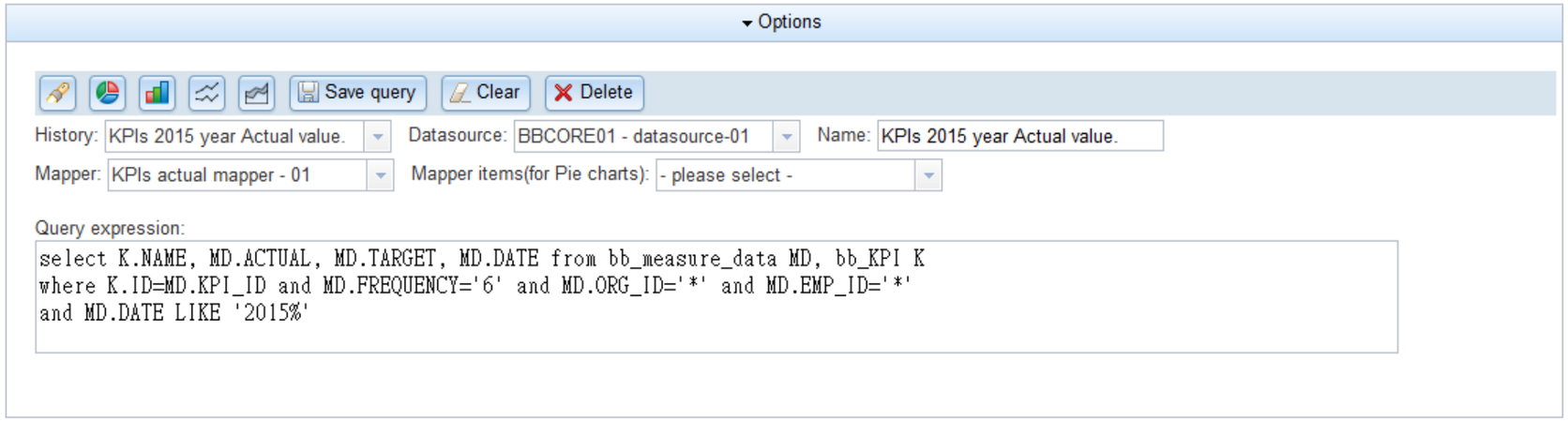


figure – 12-02

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 expression to history data.
	Clear
	Delete history data.
	Select history data.
	Select datasource.
	input query name when need Save query
	Select mapped item for query Charts
	Select mapped items for Pie charts
	input SQL query expression

The is Area Charts example.

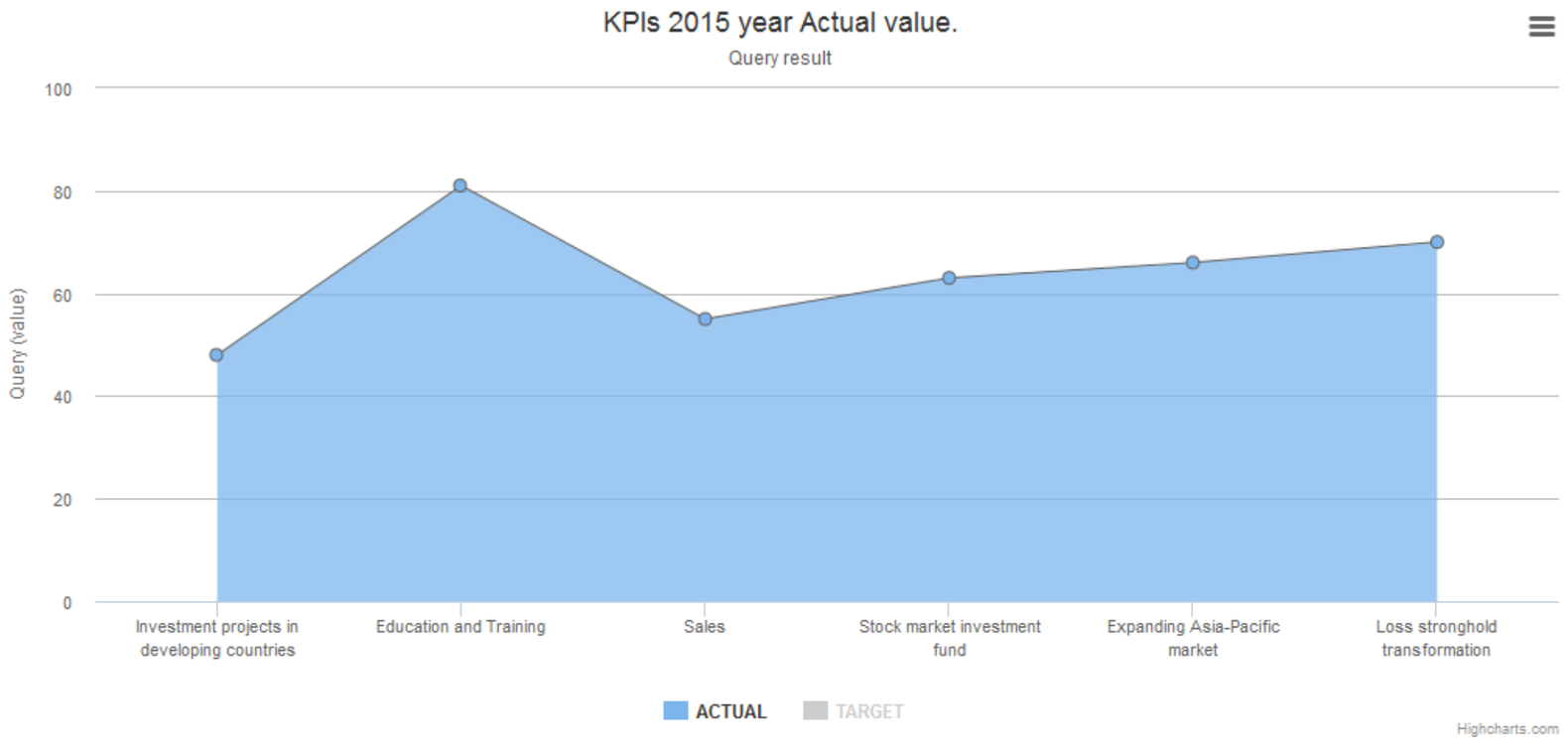


figure 12-03

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) .

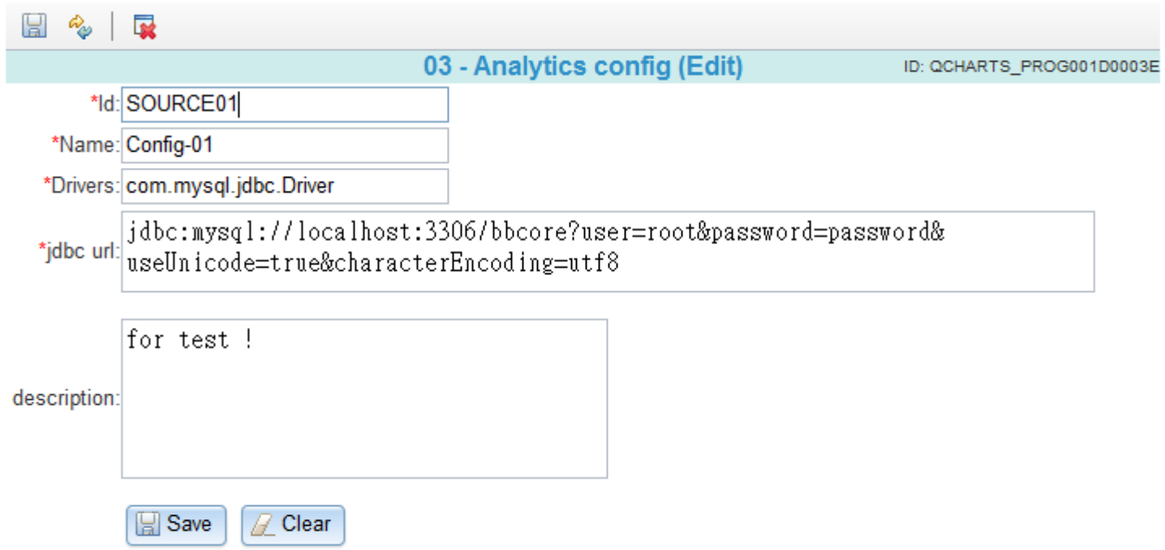


figure 13 – 01

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)

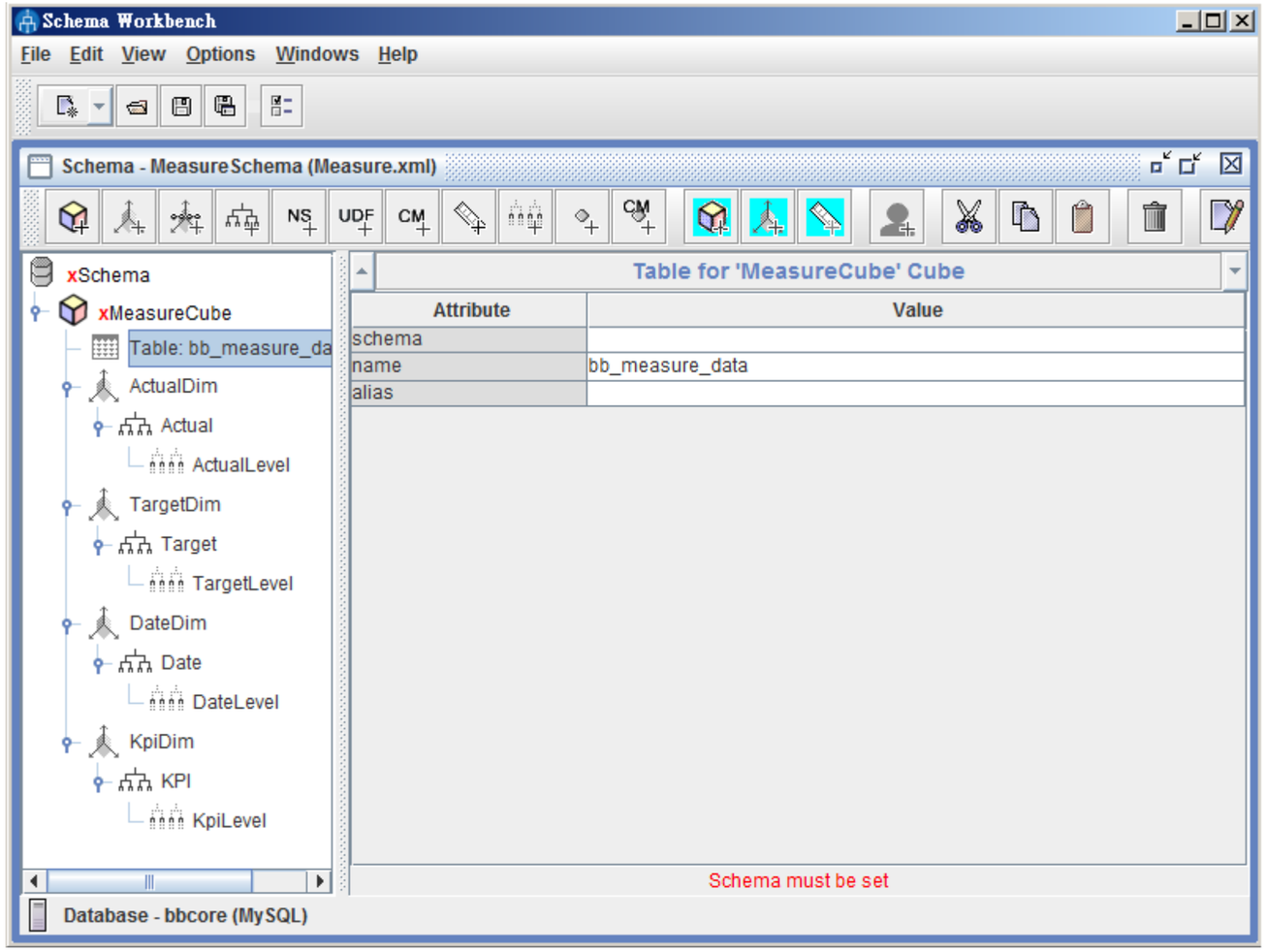


figure 13 - 02

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

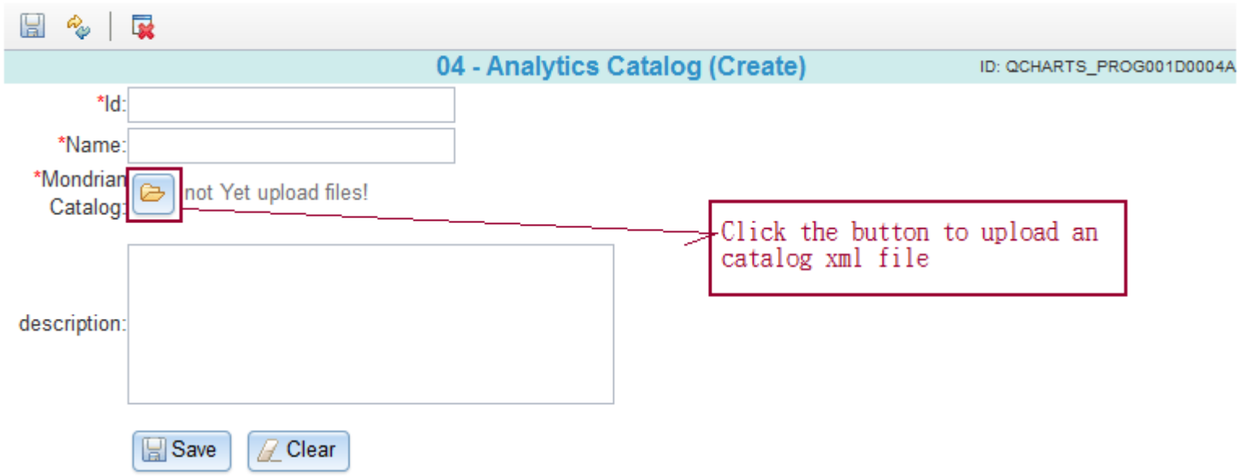


figure 13 – 03

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)

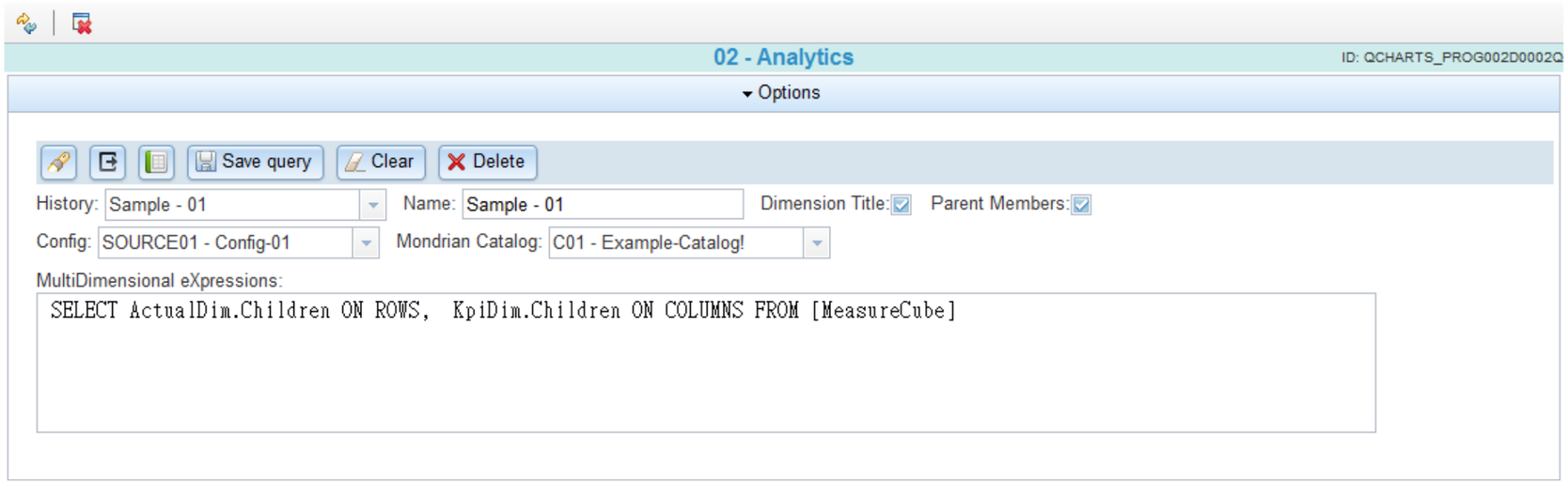


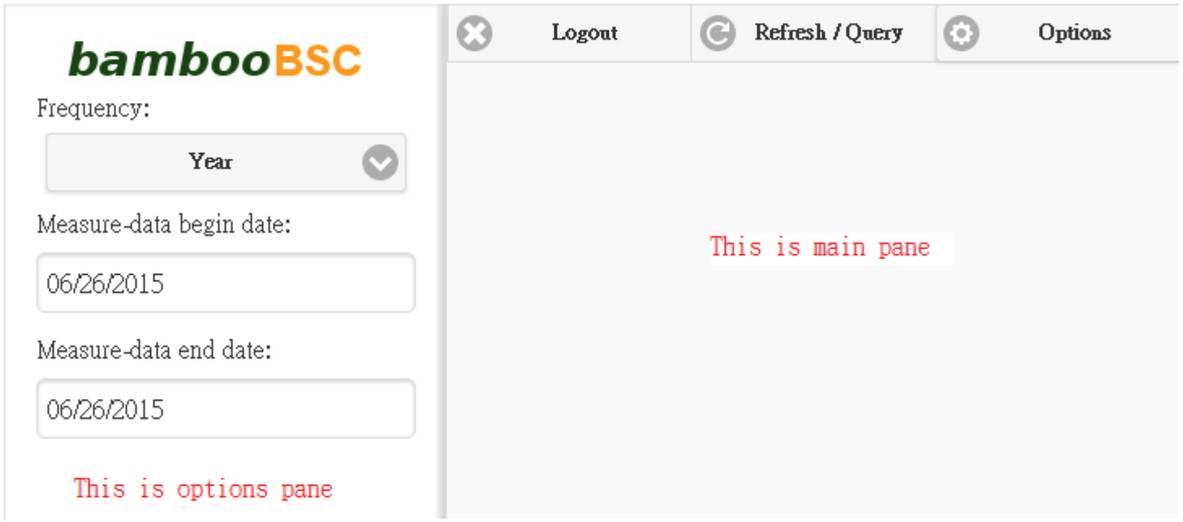
figure 13 – 04

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
	Delete current select history data.
	Select history data.
	Query name.
	Check show Title.
	Check show members.
	Select OLAP datasource config.
	Select OLAP catalog config.
	input MDX query string.

14. bambooBSC mobile version

14-1. Mobile web.

Provide scorecard query for a mobile-device browser.



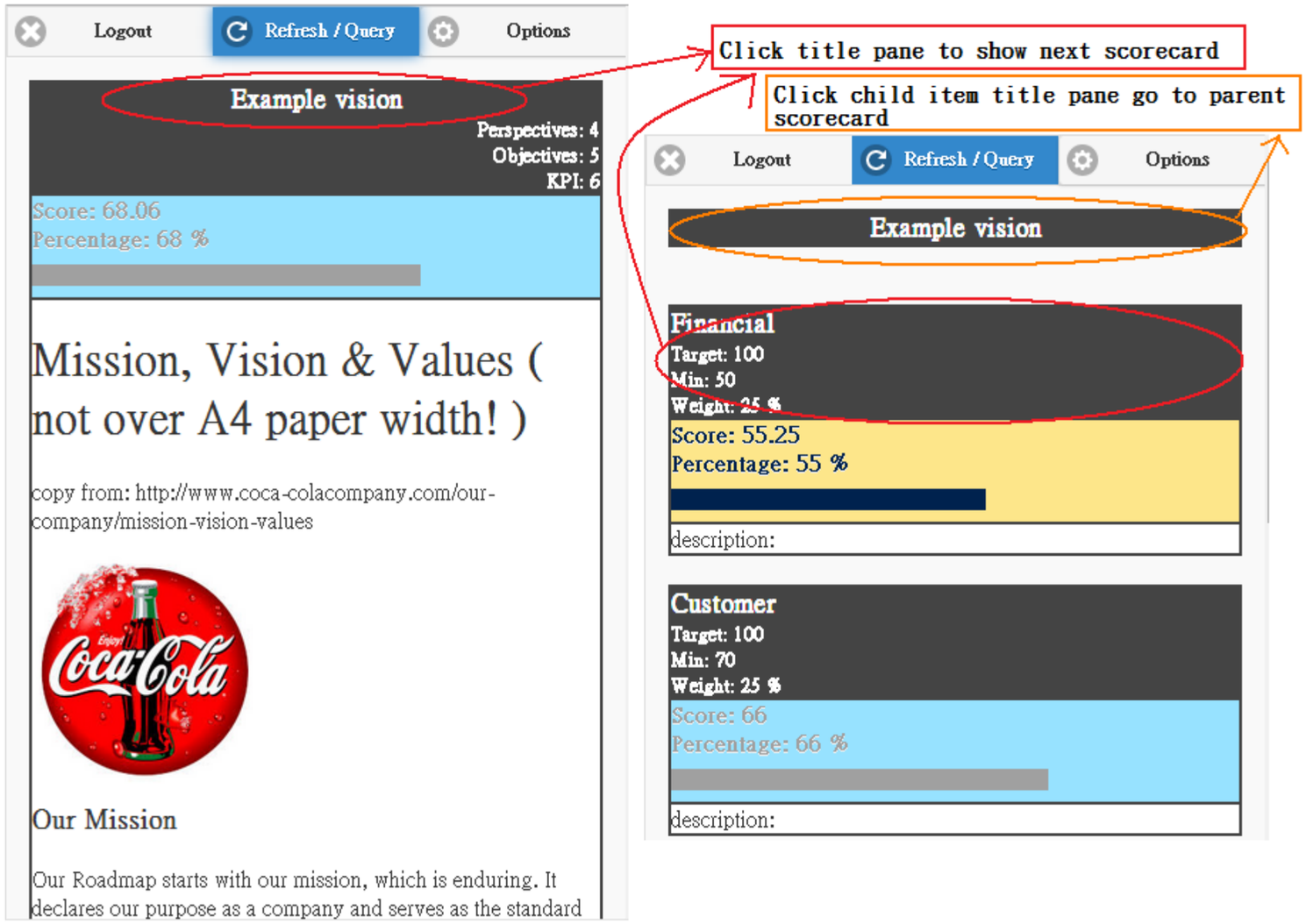
Logout: click to logout.

Refresh / Query: click to query new scorecard

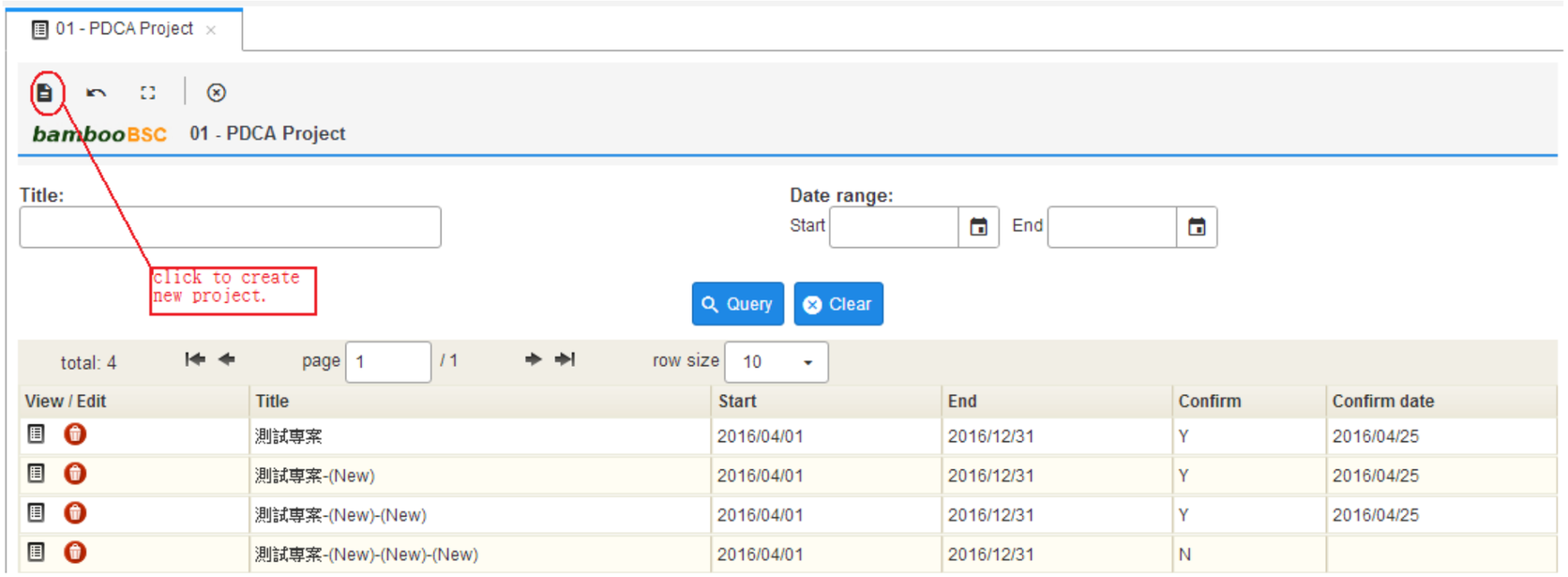
Options: click show options pane, to settings measure-data begin/end date range and frequency.

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

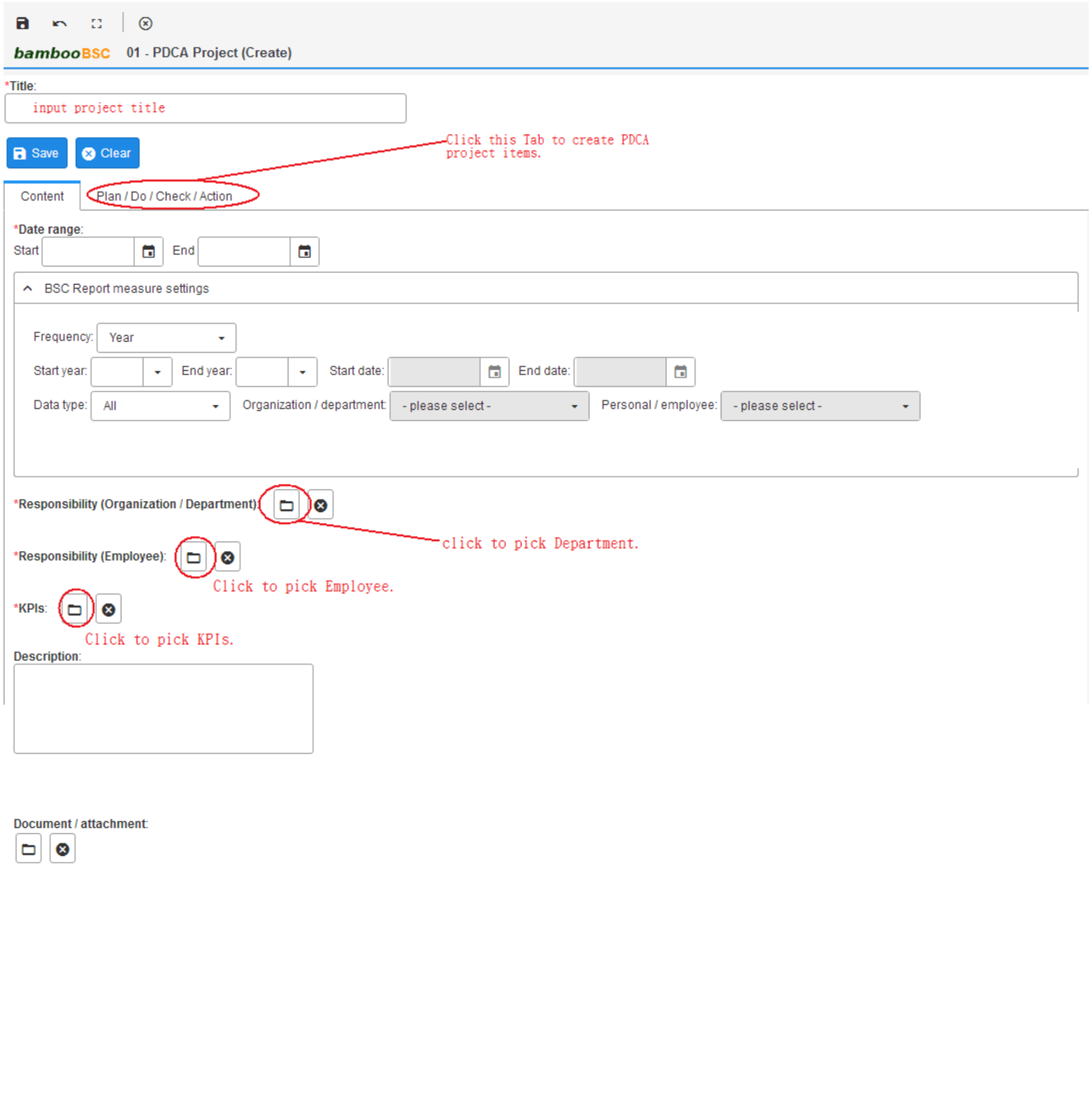
14-2. Mobile web base operation



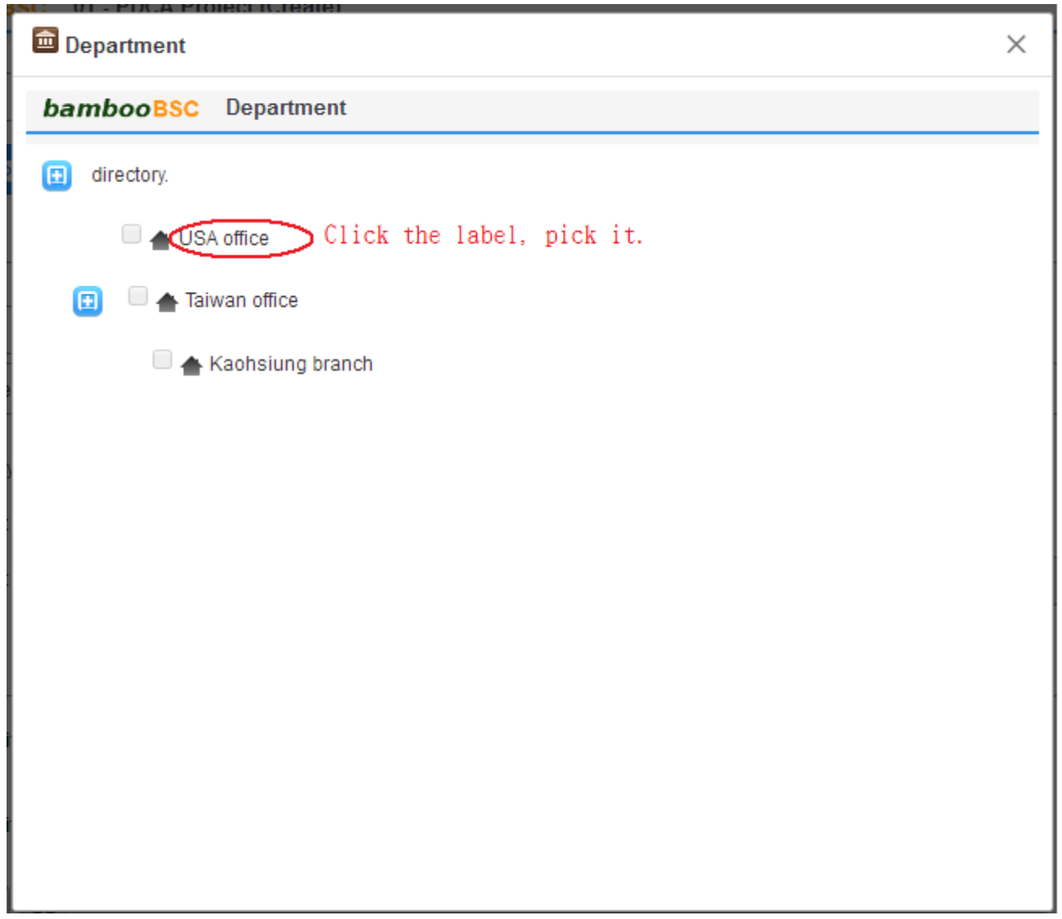
15. PDCA (Plan / Do / Check / Action)



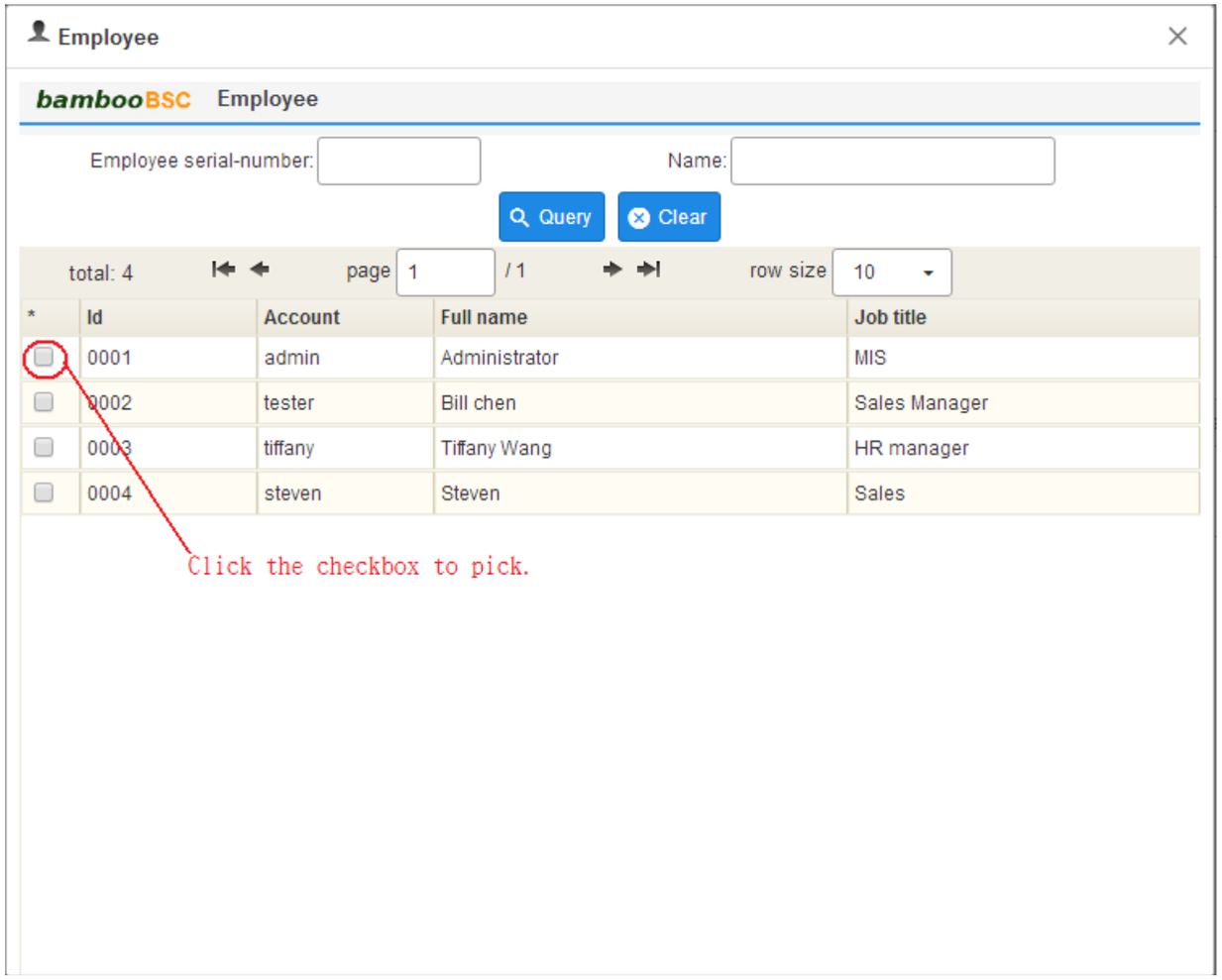
Create new PDCA Project



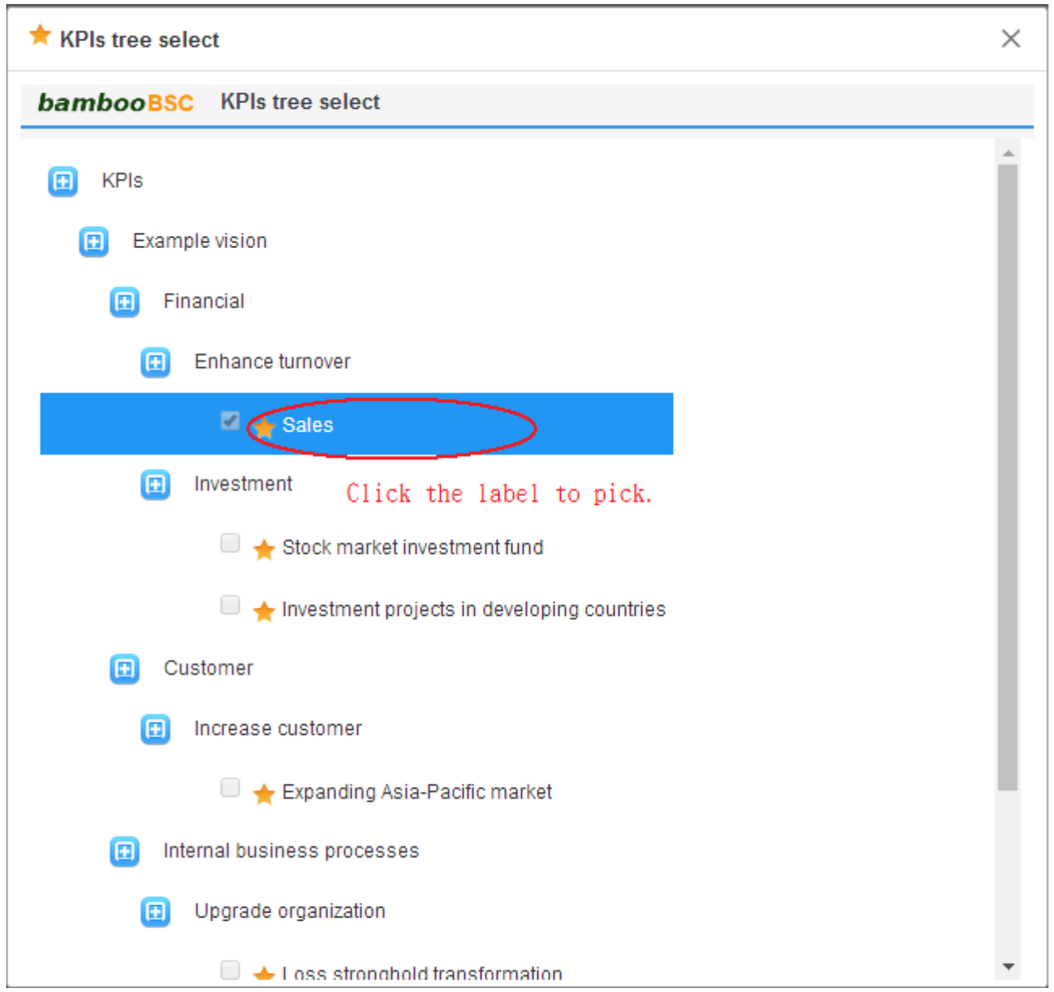
PDCA Project department pick.



PDCA Project owner/Employee 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:
Start 2016/04/01 End 2016/04/30

Input item start-date and End-date.

PDCA Project , item must has type
P item.
D item.
C item.
A item.

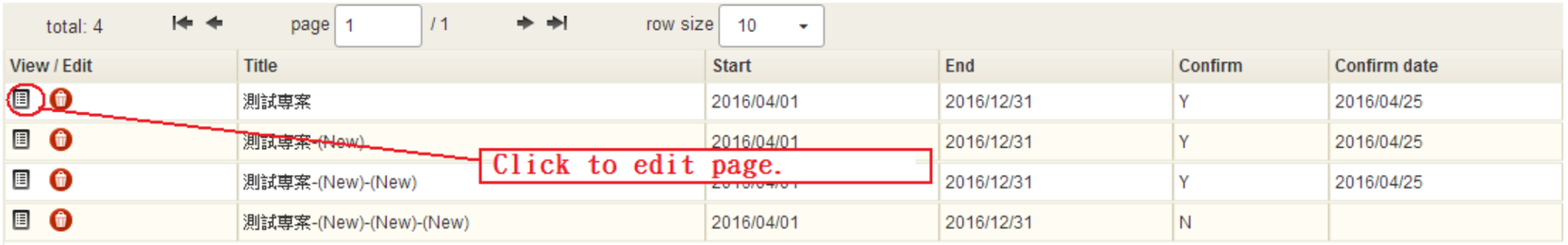
Description:
this is test!!

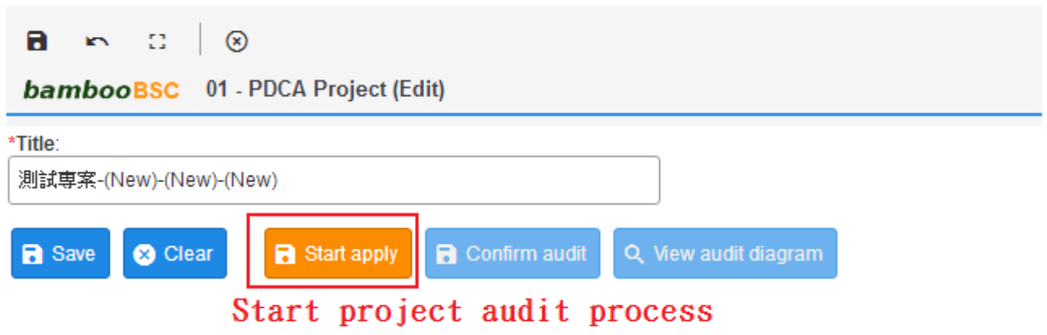
Click Add button to add this item.

Add

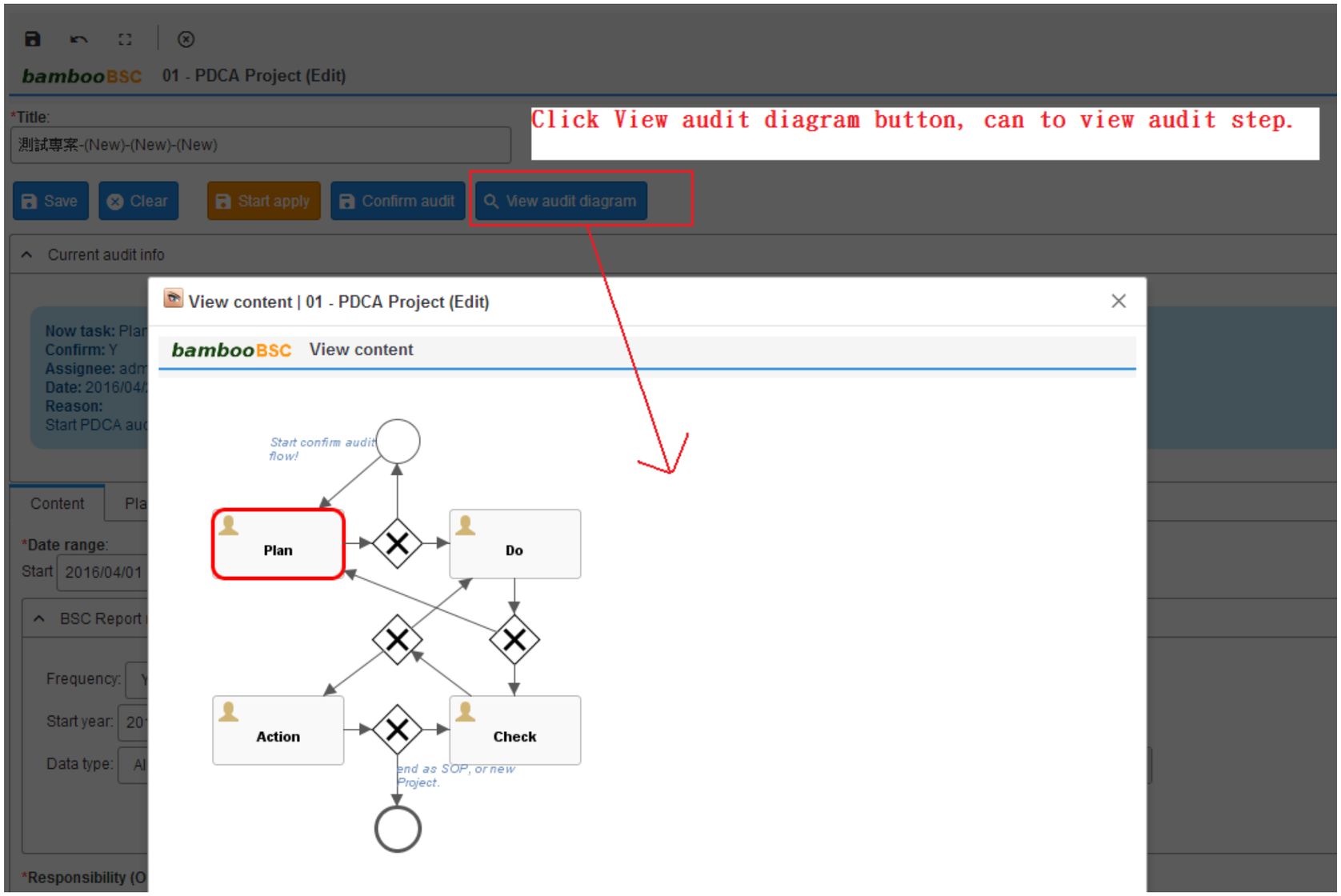
*	Type	Title / Date / description
	P	TEST this is test!! **Date range:** 2016/04/01 - 2016/04/30 *Responsibility (Employee) item must be to pick Responsibility/Employee. Document / attachment:

Audit project.

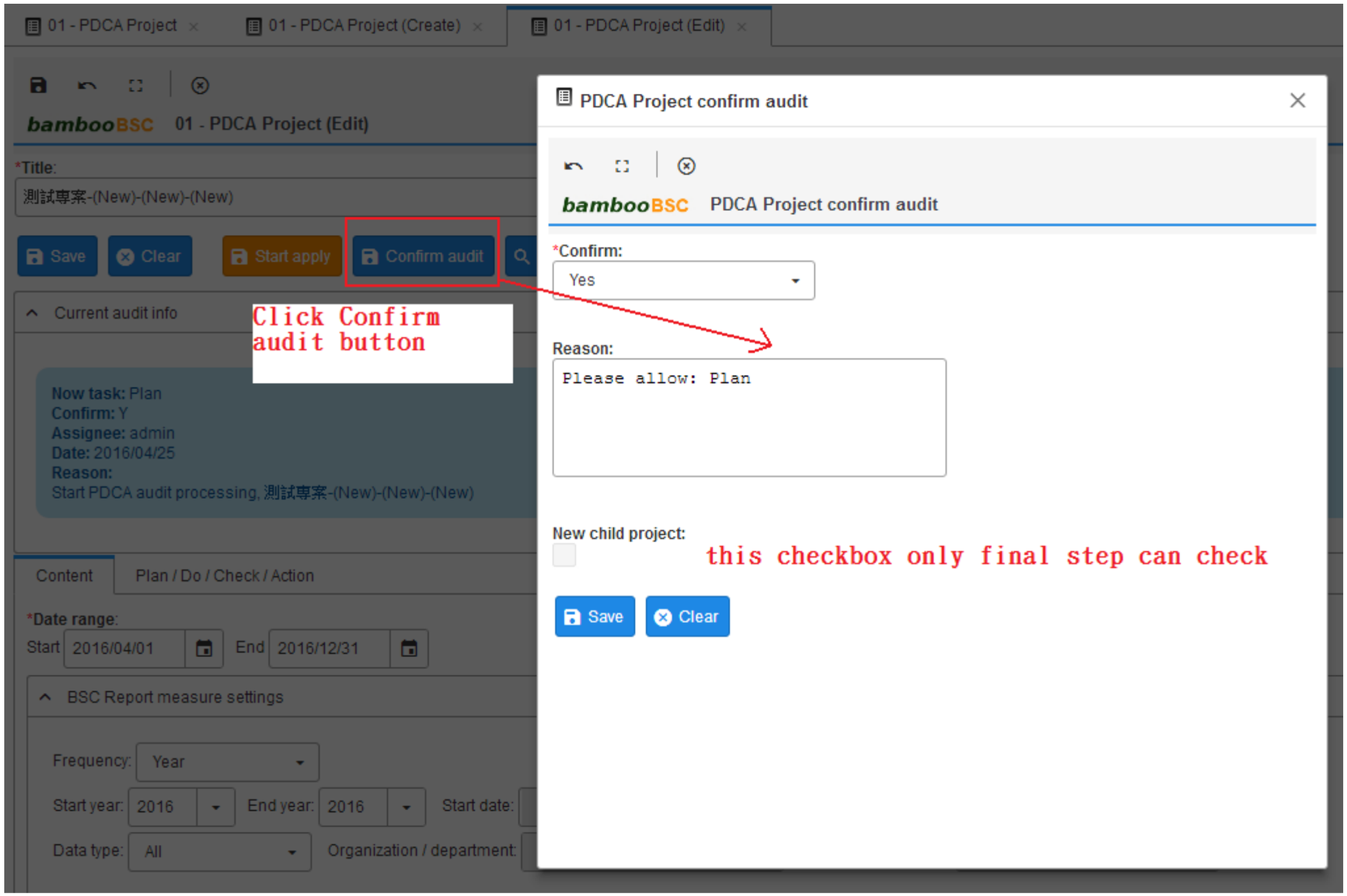




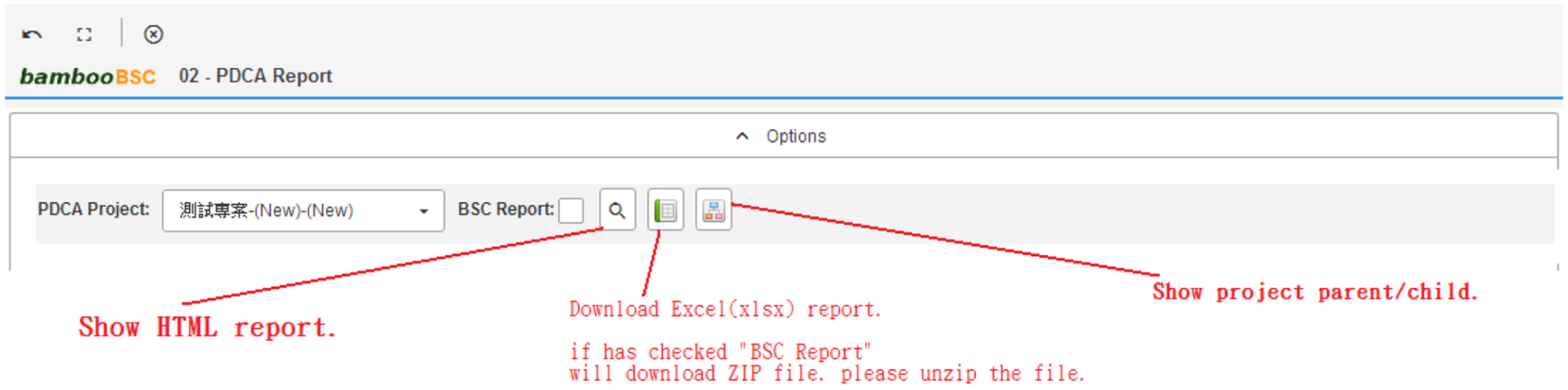
View now audit step of PDCA Project



Confirm audit for PDCA Project



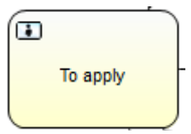
PDCA Report query operation

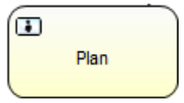
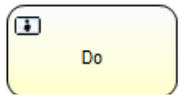
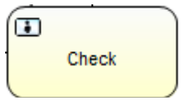


16. Audit settings (if PDCA Project or 360 Project edit page cannot click “Confirm audit” button)

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