Using Gentia to Build a Balanced Scorecard

(ref: rbsc03)

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Compass Group

Using Gentia to Build a
Balanced Scorecard
System

5 oktober, 2000

Reindert Verbrugge

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Agenda

- Introduction
  - Concepts of EPM, BSC & terminology
- Using a developed scorecard application
  - from a user's point of view
- Architecture
- Using the Gentia wizards to build a scorecard

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EPM - Enterprise Performance Management

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EPM - Definition

Enterprise Performance Management (EPM) drives business performance at strategic, management and operational levels by analysing, measuring, and communicating information that promotes corporate objectives and strategy.

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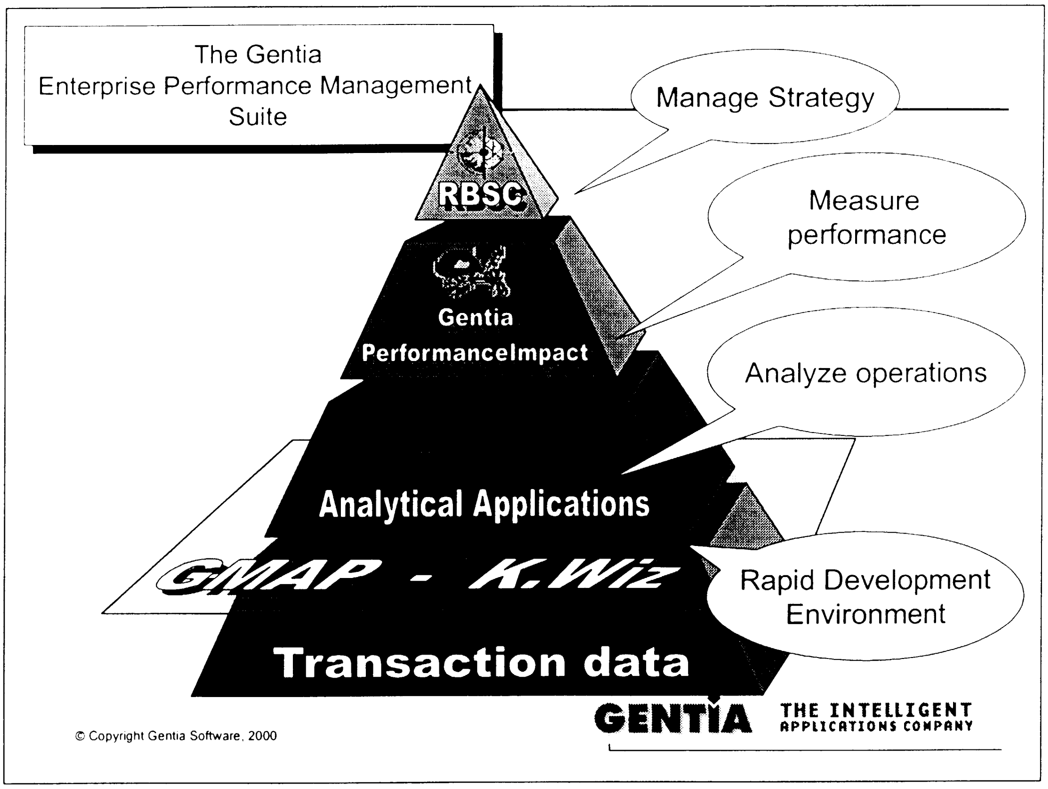
The Gentia
Enterprise Performance Management
Suite
Manage Strategy
Measure performance
Analyze operations
Rapid Development Environment
RBSC
Gentia
PerformanceImpact
Analytical Applications
GMAP - K.Wiz
Transaction data
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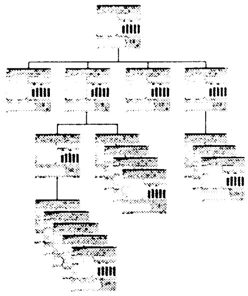
Renaissance Balanced Scorecard

- Solution for strategy and enterprise performance management
- Automates Kaplan and Norton Balanced Scorecard methodology
  - Strategic communication and alignment [illegible]
  - Cause and effect analysis
  - Initiative management
- Completely enterprise deployable
- Links to Analytical Applications



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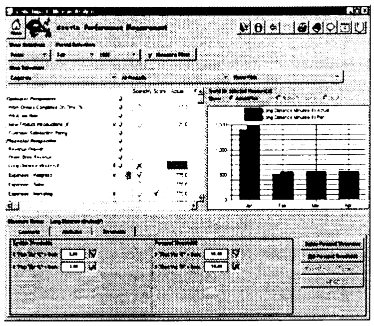
Gentia Performance Impact

- Solution for tracking, monitoring and managing enterprise performance
- Fully customizable analysis and measurement capabilities
  - Trends, charting, ad hoc analysis, etc.
  - Weightings and thresholds
- Enterprise deployable
- Pathway to Renaissance Balanced Scorecard and Analytical Applications



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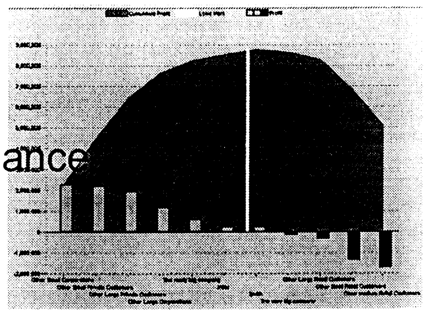
Analytical Applications

- Packaged solutions for analyzing operational information
- Gentia, third-party or custom built
- Inter-application integration
- Based on Gentia platform
- Enterprise deployable
- Pathway to Gentia Performance Measurement and RBSC



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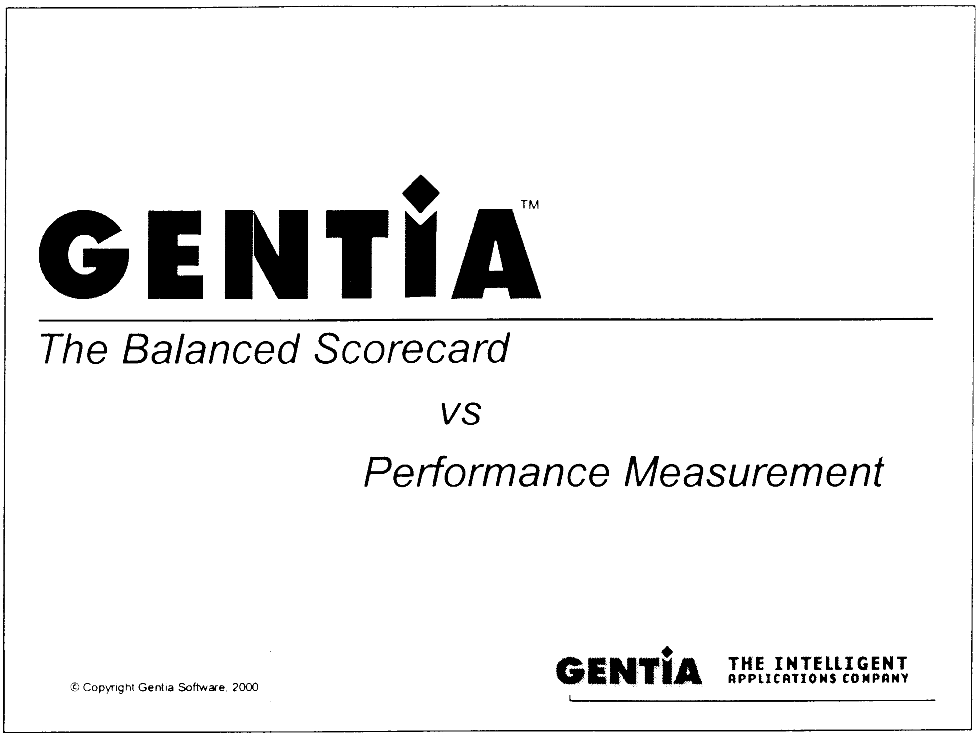

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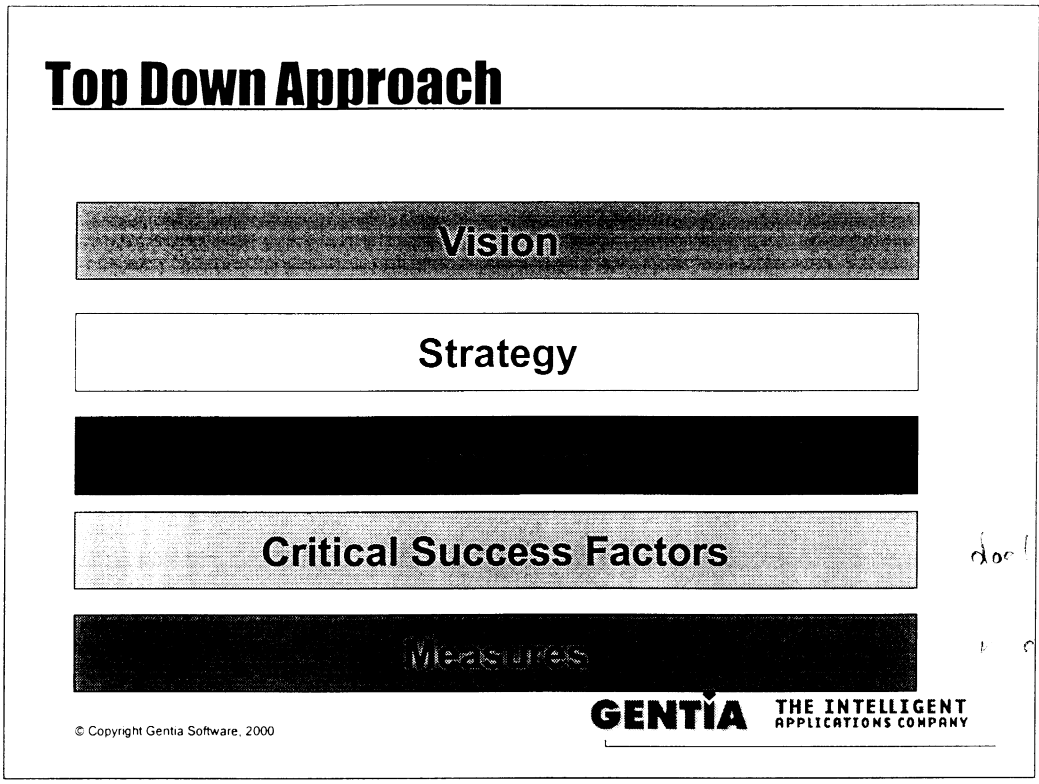
Top Down Approach
Vision
Strategy
Critical Success Factors
Measures
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Bottom Up Approach

Critical Success Factors

Measures

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EPM - Summary

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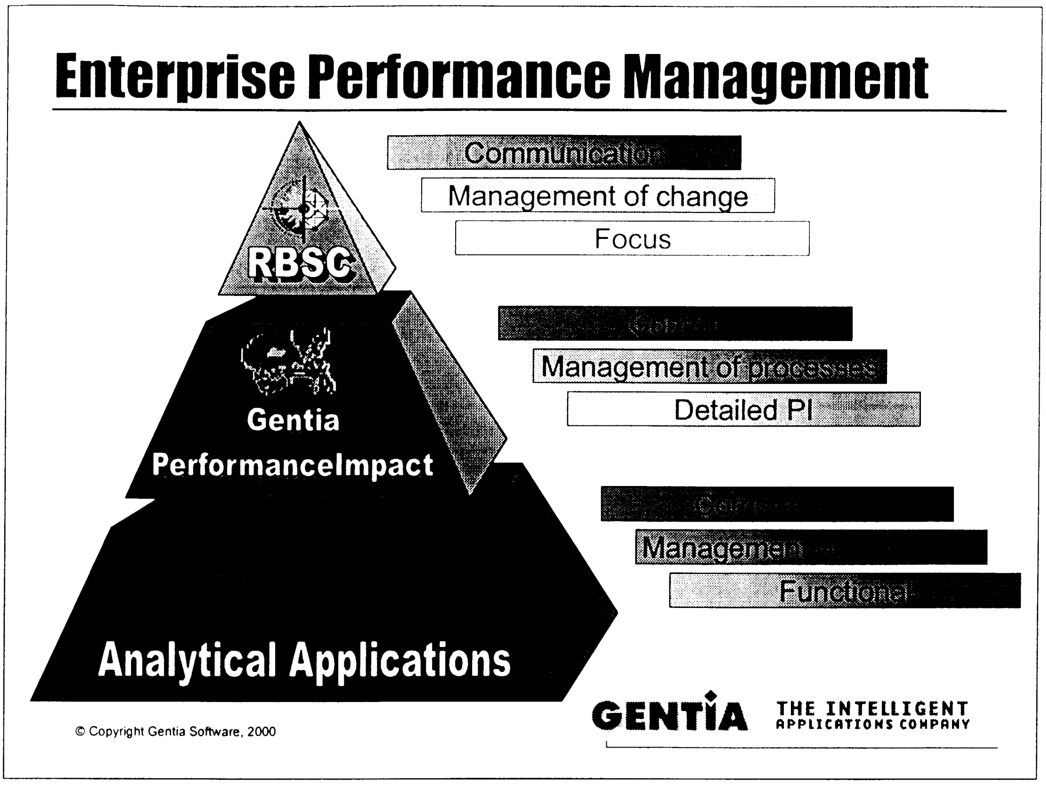
Enterprise Performance Management
RBSC
Gentia
PerformanceImpact
Analytical Applications
Management of change
Focus
Management of processes
Detailed PI
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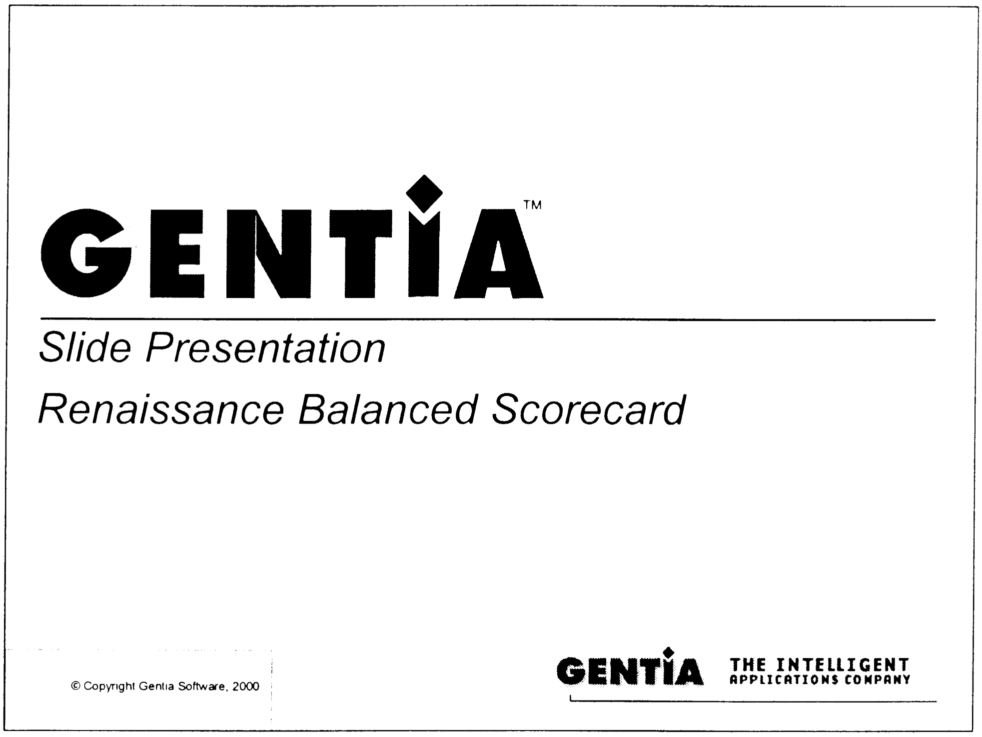
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Slide Presentation
Renaissance Balanced Scorecard
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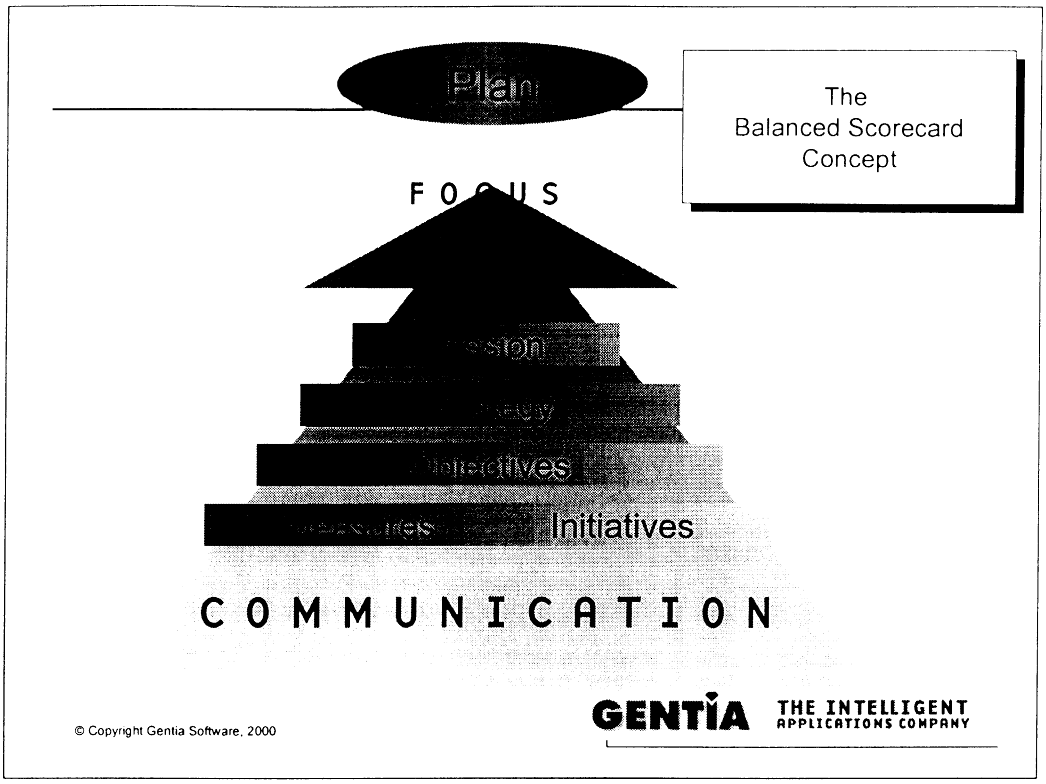
Plan
The
Balanced Scorecard
Concept
Initiatives
COMMUNICATION
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Why a Scorecard Support System

"If the scorecard stops at senior management and does not find its way down to lower levels in the organisation, its potential as a value creation tool will never be fully realised."

Robert Kaplan

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BSc Support System

- 1. Enterprise wide deployment
- 2. Ease of use
- 3. Link vision to objectives and measures
- 4. Integration of Personal Scorecards with Organizational Scorecards
- 5. Support quantitative and qualitative information
- 6. Facilitate dynamic communication & feedback
- 7. Link through to other BI applications

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What is a Balanced Scorecard?

- An application which helps to focus on the strategy of an organisation
- It incorporates the objectives that form part of the strategy
- The strategy should include both financial and non-financial objectives
- The objectives are broken down into a series of initiatives
- Each objective and initiative is *owned* by an employee, who takes responsibility for its success and makes an assessment accordingly

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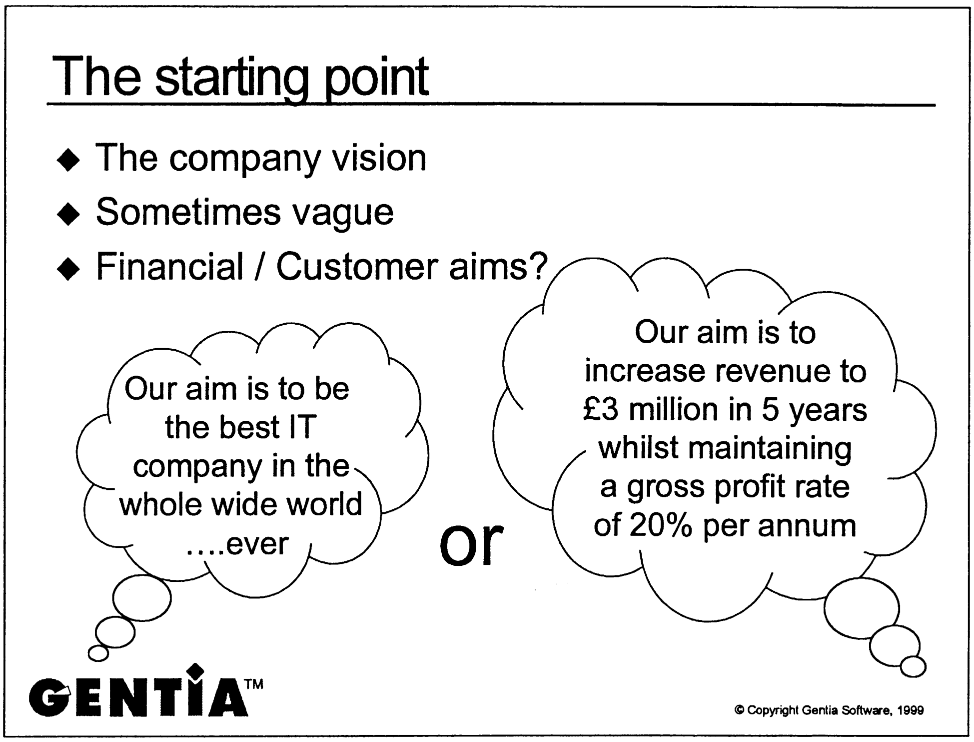

The company vision or aim a good place to start a balanced scorecard. If this is considered the long term goal of the company, it is logical that the scorecard should reflect this aim. With this in mind, the aim should contain specific objectives, rather than simple ideas.

The company vision is only the starting point. The strategy of the organisation needs to be defined and the vision can help focus towards this

Typically, the strategy would be defined through a series of tasks, meeting and workshops.

Important Concepts

- Qualitative and quantitative measures
- Leading and lagging indicators
- Perspectives

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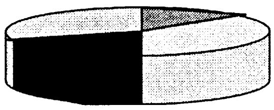
Quantitative and qualitative measures

- Quantitative measures:
  - based purely on data
- Qualitative measures:
  - based on other information (not just data) like:
    - opinions, interpretations, circumstances



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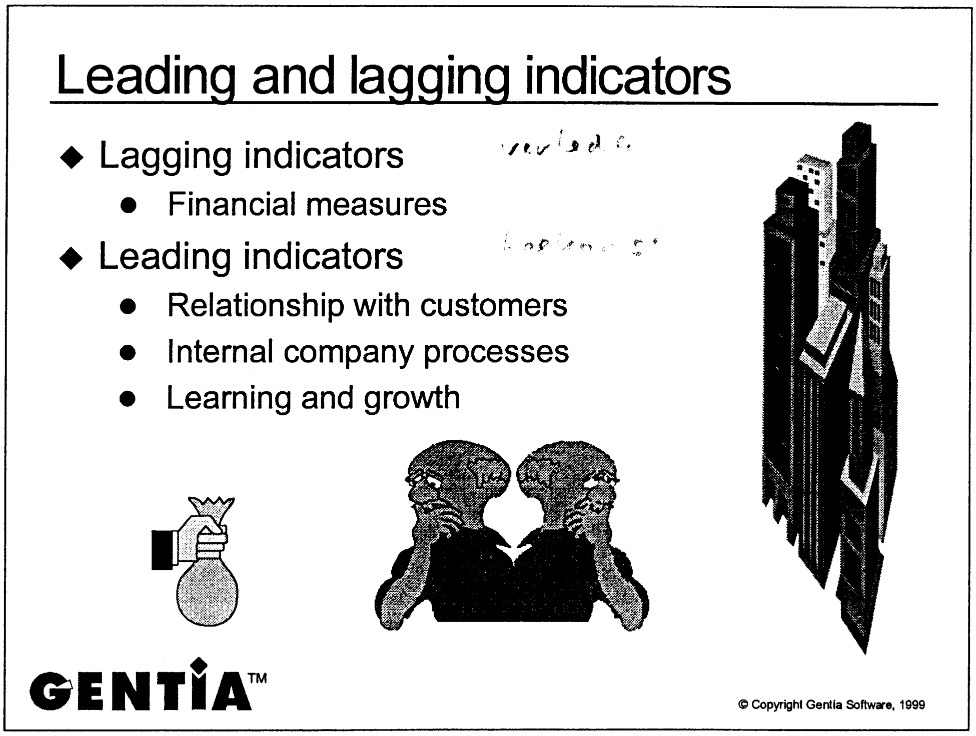
The data in a scorecard is only one way of measuring the company's performance and potential.

In addition to the data, assessments are made by users of the application, which allow qualitative information to be introduced to compliment the quantitative information.

For example:

The cost figures for April are 50% less than on the previous months. This might indicate that the company is doing very well at controlling costs. However, the *owner* of the scorecard knows from other sources that a 20 people have just left the company. Costs have halved because salaries do not have to be paid to these people, not because the company has actively tried to curb costs.

The user can mark this event by adding comments and showing his / her opinion of the facts.



The strategy is bound to reflect financial indicators since most commercial organisations are concerned with revenue and profit. However, other non-financial indicators are also very effective measures of performance.

For instance:

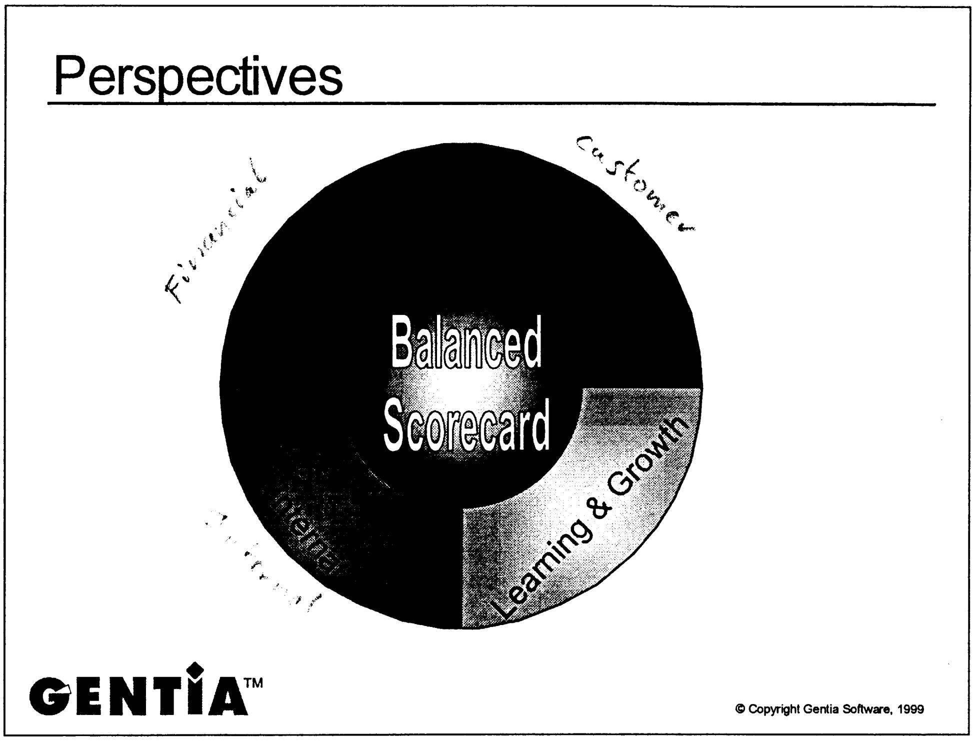
Staff turnover provides a good indication of morale within an organisation. If morale is high, staff are more likely to be productive.

Financial measures generally reflect what *has happened* to the company rather than what *will happen* to the company. They are known as **lagging** indicators. In reality, an indicator such as profit is limited in its usefulness since it measures something that has already happened.

However, lagging indicators are necessary since the ultimate aim of an organisation (usually reflected in the vision or mission statement) tends to be based upon financial indicators.

Other indicators that focus the company's attention to the future (e.g. staff turnover) are known as **leading** indicators. These indicators help to focus on what could happen, which is useful since action can be taken before it is too late.

A balanced scorecard contains both lagging and leading indicators .



Most scorecards can be divided into four perspectives, each containing different types of objectives and indicators:

Financial - concentrates on the financial measures, such as profit, revenue and costs. It often appears as the top level of a scorecard and the other perspectives often feed into it.

Customer - focuses on the organisation's relationship with their customers, e.g. customer satisfaction.

Internal - to measure the key processes that support the running of the business.
ie. building ⟶ testing ⟶ distributing

Learning & Growth - focuses on longer term investment in the company infrastructure, but are not currently part of the key business process, e.g. training programmes.

The idea is that all the objectives in the perspectives are related, since they tend to affect one another.

For instance:

A measure in the customer perspective might be customer retention. This potentially affects revenue, a measure in the financial perspective.

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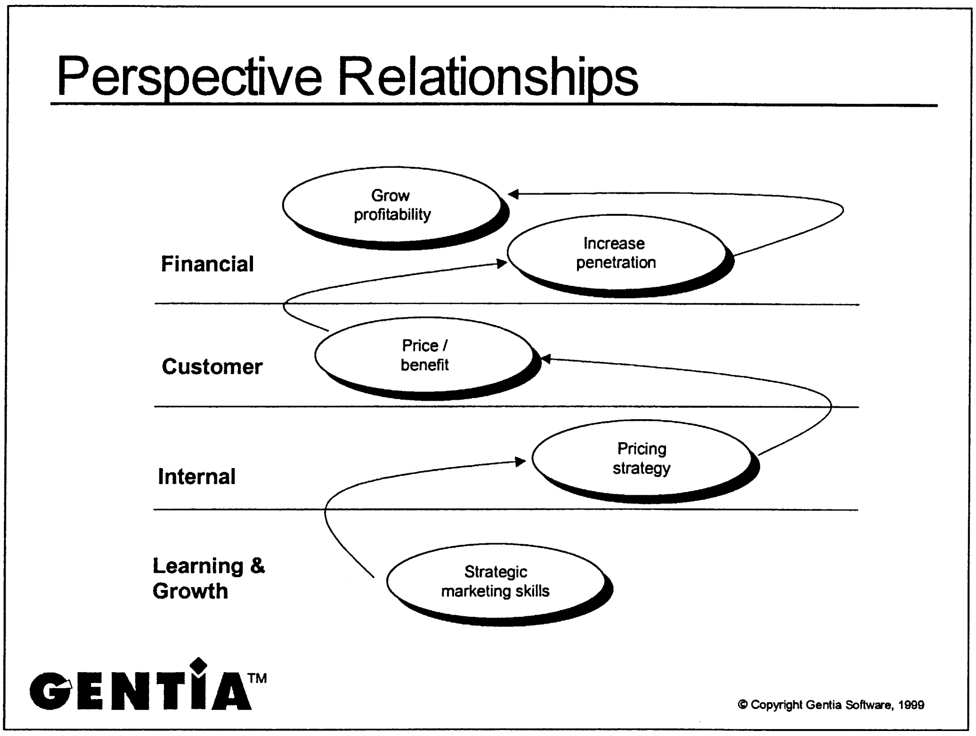

The idea is that the objectives are all related, since each objective should somehow contribute to the ultimate aim of the organisation, which tends to be based on financial measures such as revenue and profit - for **most** organisations.

Objectives will usually be linked as in the above slide but occasionally, a link might skip a perspective, e.g. an internal objective might link directly to a financial objective.

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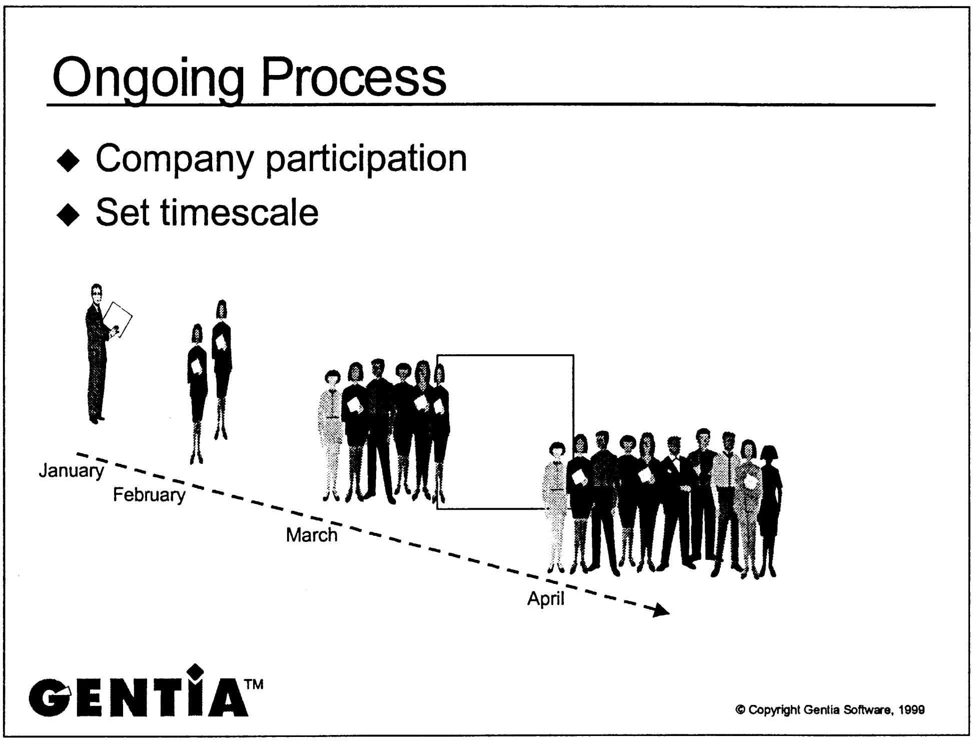

As far as the design phase of the scorecard is concerned, it is very management focused. It works best if the process is sponsored by the CEO of a company or a senior director who can *insist* that managers come to meetings and workshops. It is quite common to cancel meetings if even one manager cannot attend.

The design process usually lasts about 8 -12 weeks, but this can depend very much on the scale of work involved and the number of participants.

Thereafter, implementation is relatively quick, depending upon where data that feeds into the application is held. At times, data is required by the scorecard which may not yet exist, which could extend the implementation time.

Organisations change constantly and it is important that the scorecard is regularly updated to reflect these changes. Eight months or so after the initial implementation, it is recommended that an audit is carried out to assess the effectiveness of the scorecard.

Terminology

- Database relationships
- Scorecard
- Objective
- Measure
- Perspective
- Initiative
- Milestone
- Theme
- Portfolio

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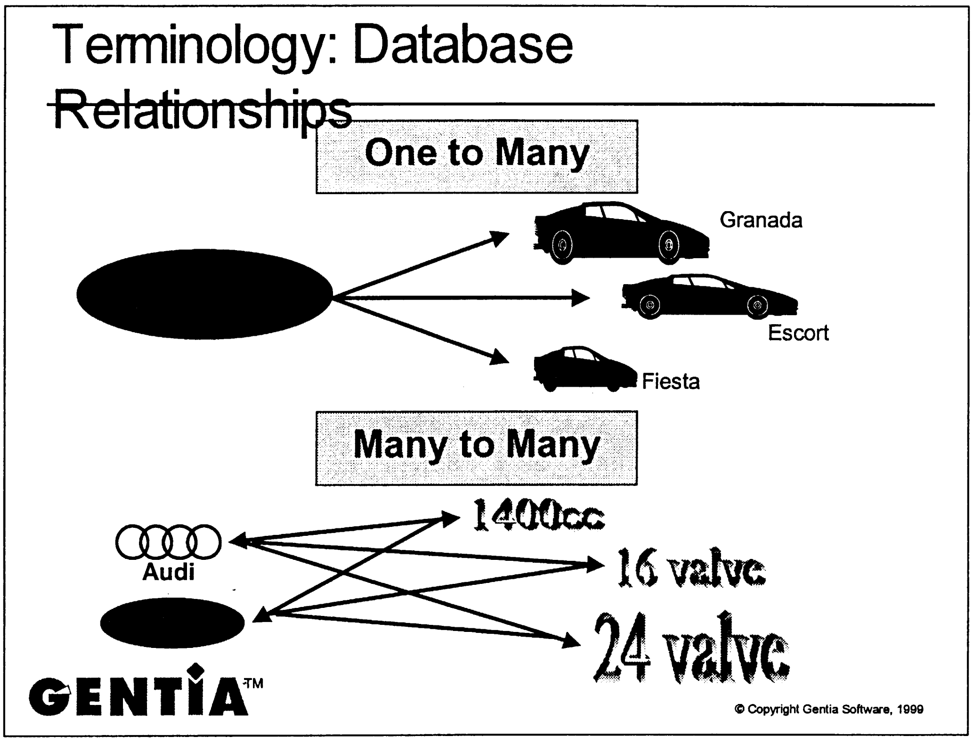
The aim of the next few slides is to explain the terminology used in creating a balanced scorecard. These words correspond with words used in the software wizards. It is imperative that the meanings of these words are fully understood, before a scorecard can be designed and built.

The following slides will create a logical data model, showing the relationship between the various elements of the scorecard. In addition, there is a brief explanation of database relationships, which is very important is constructing the model.

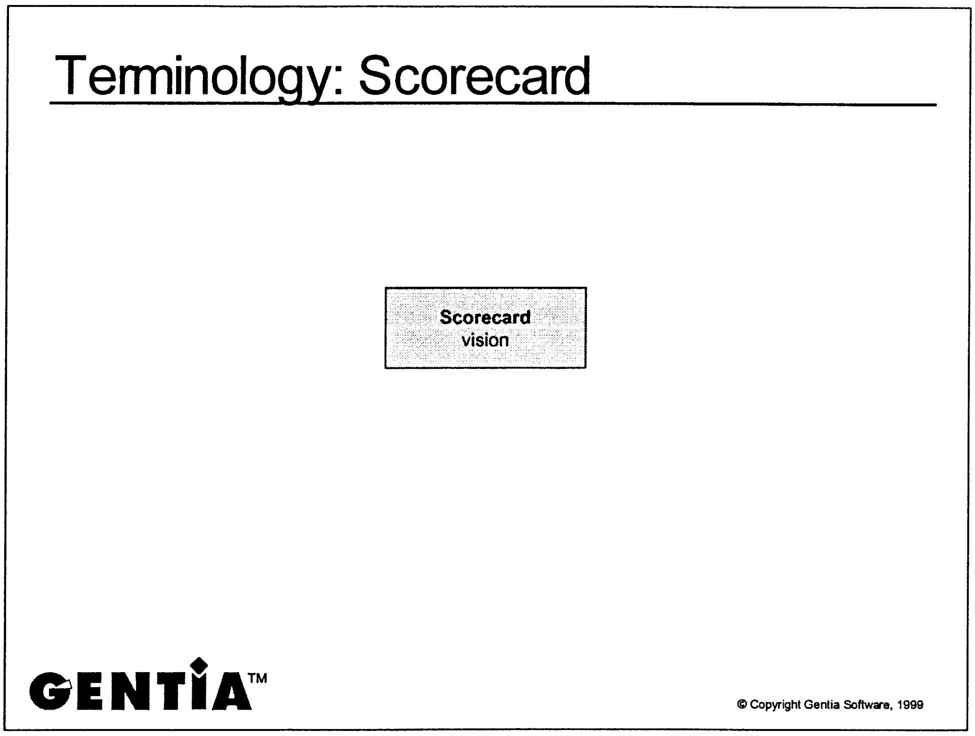


The database relationships above are relatively straightforward.

A *One to Many* relationship shows how one **manufacturer** field can have many **car model** fields associated with it, however each model is only associated with one manufacturer. So, Ford make many models but each model has one maker; Ford.

A *Many to Many* relationship shows how many **manufacturer** fields can have many **engine** fields and many engine fields can be associated with many manufacturers. So, Ford make a number of engine sizes as do Audi. 24 valve engines are made by Audi, Ford, BMW etc.

This way of describing database relationships is very common and will become apparent as the design process progresses.



When considering balanced scorecard terminology, a good starting point is with the scorecard itself. That way, we can see how everything relates to it.

The scorecard groups together objectives (mentioned in the next slide) in order to focus the strategy of the scorecard owner (individual or business unit).

It holds the different views of the information and allows the users and owners to see data, comments, charts etc.

Example of a Scorecard:

A multi-national company could have a world-wide application, with a scorecard for each geographical location. So, an example might be the UK office.

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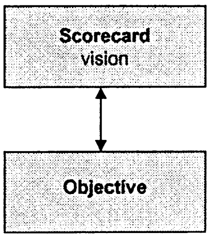
Objectives



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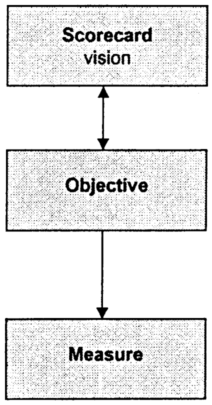
The scorecard contains a group of objectives, all related to the scope of the scorecard.

The objectives are often the starting point when building a scorecard, although not always. The objectives form the goals of the scorecard; they state what the scorecard must achieve.

A scorecard will typically have a number of objectives. However, a number of scorecards might share the same objective, i.e. a many to many relationship.

Example of an objective:
Within the UK scorecard an objective might be to improve morale of the staff.

Measures



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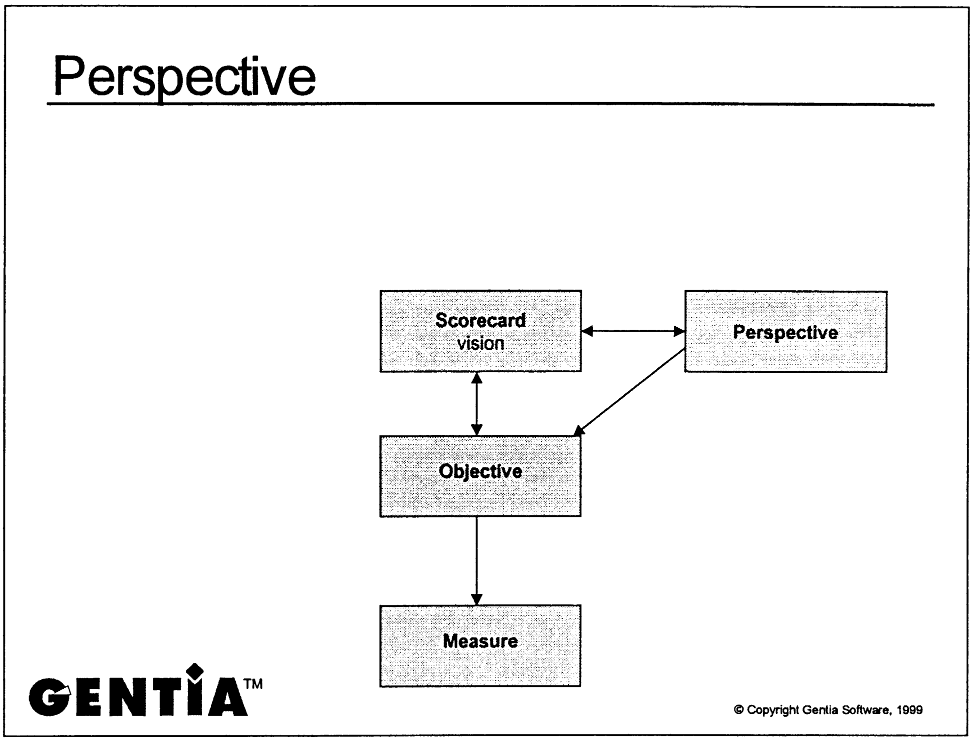
Measures will indicate how an objective performs. Each objective might have a number of measures. They *measure* the performance of the objective.

Each measure is associated with only one objective.

Example of a measure:

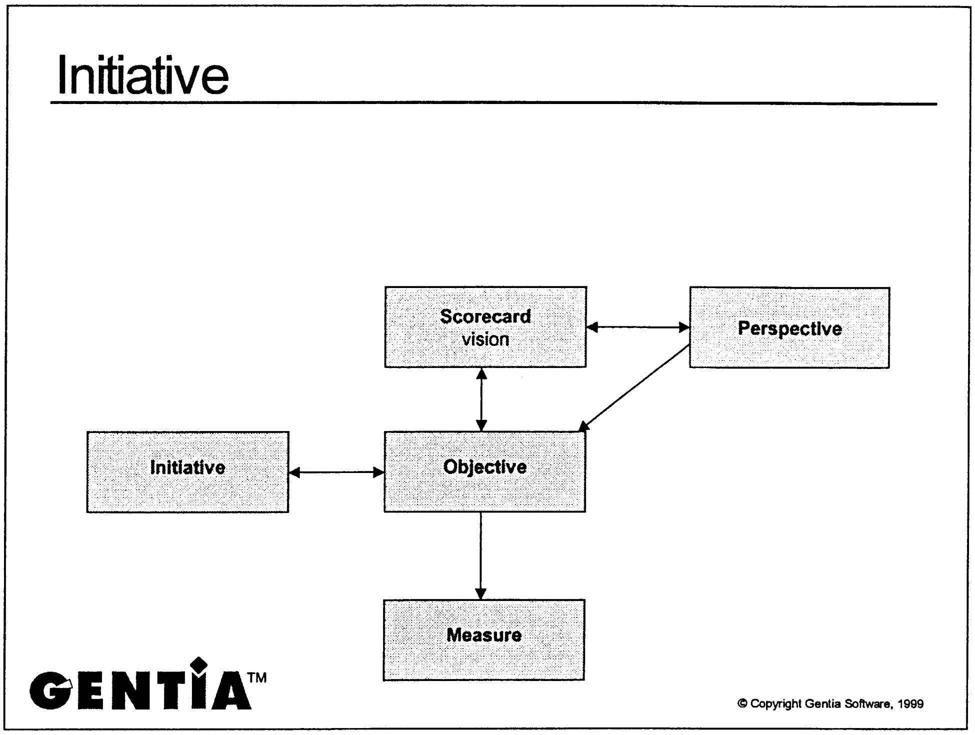
A measure of staff morale could be the number of people leaving each month.



Perspectives are the 4 key areas of the business or organisation, into which the objectives should naturally fit. They are usually standard within most companies. The perspectives are : **Financial, Customer, Internal** and **Learning & Growth**.

Example:

The objective to increase staff morale would fit into the learning & growth perspective.



Initiatives are mini *action plans* which are designed to achieve one or more objectives. They usually consist of a number of stages. Each objective can be associated with many initiatives and many initiatives can be associated with many objectives.

Example of an initiative:

An initiative associated with the objective to increase staff morale could be to improve the office environment.

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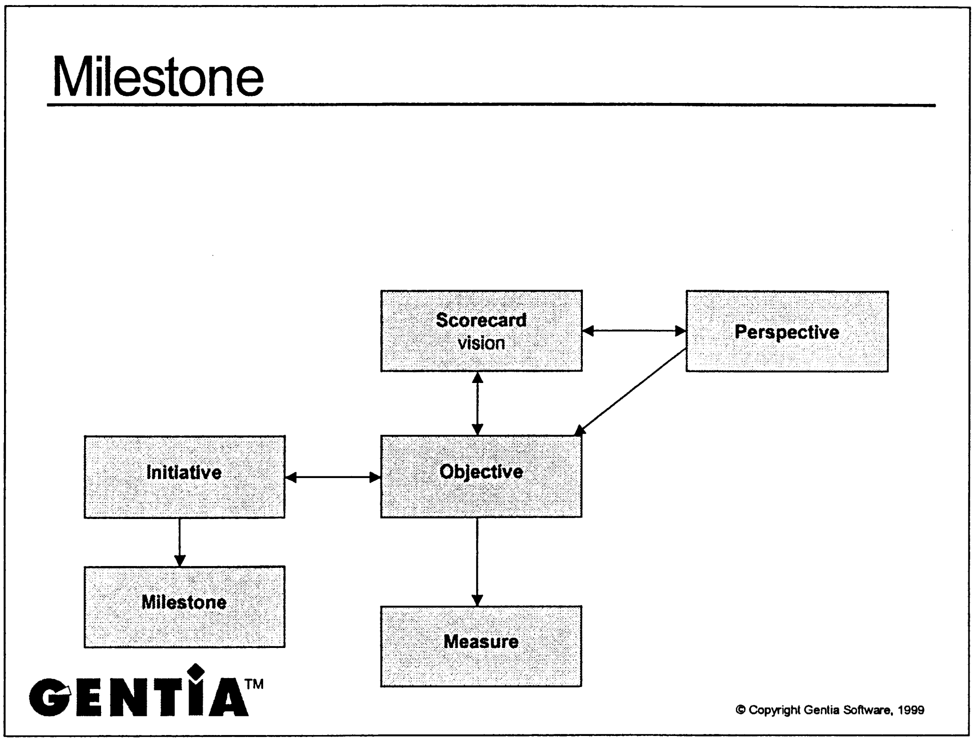
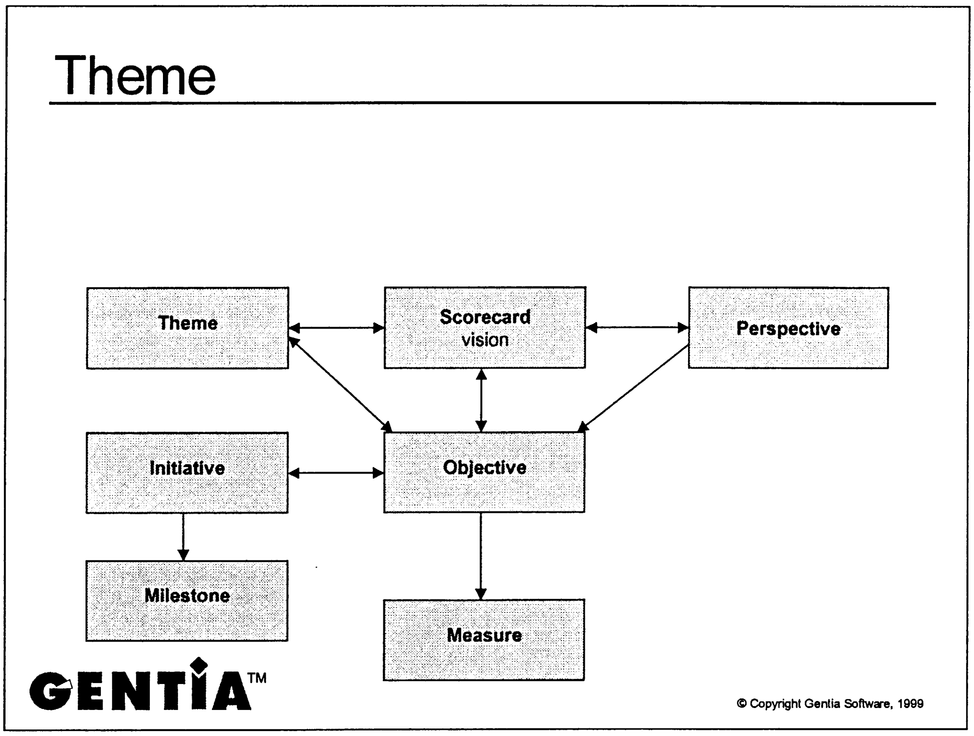


Milestones are the stages of an initiative. They allow the owner to check if the initiative is running to plan.

Example of a milestone:

A milestone in the initiative to improve the office environment could be to organise a *office blitz* day, where everyone focuses on tidying their departments to clear out anything unwanted or unused.



Themes can often be the starting point for a balanced scorecard. They are linked objectives taken from a number of scorecards.

Example of a theme:

A theme could exist across all the geographical scorecards which might be to improve the quality of staff in the organisation. This could encompass all the objectives associated with recruitment, training and staff retention across all the scorecards.

Themes and objectives

Theme 1	Objective 1
	Objective 2
	Objective 4
Theme 2	Objective 1
	Objective 2
	Objective 3
	Objective 4

Financial	Objective 1
Customer	Objective 2
Internal	Objective 3
	Objective 4
Learning	Objective 5

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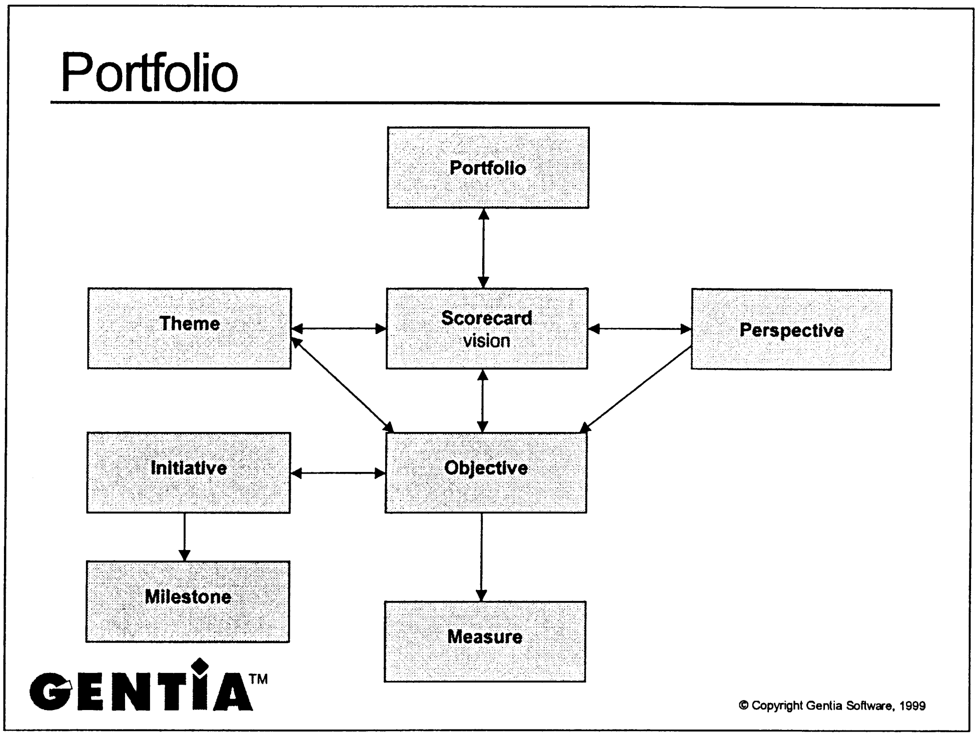
If a user shows all their objectives grouped together by themes, there could be some objectives shown more than once. This is because objectives can be linked to more than one theme. If the objectives are grouped by perspective, they will only appear once, as an objective will always be defined in terms of a perspective.



A portfolio is a broad view of objectives, taken from a number of scorecards or business units.

Example of a portfolio:

A senior member of an organisation might have a portfolio which looks at a selection of objectives across the scorecards for Europe, say: UK, France, Benelux and Scandinavia.

The type of analysis that is available at the portfolio level is the same as at the scorecard level.

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Example of a portfolio

Objective	Scorecards			
	A	B	C	D
Objective 1	✧			✧
Objective 2		✧		
Objective 3	✧		✧	✧
Objective 4	✧		✧	
Objective 5	✧	✧		
Objective 6	✧			✧

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To see any more detail, the user would need to go into an individual scorecard and view the data there.

Summary

- What is a balanced scorecard?
- Introduction to some concepts
  - Quantitative & qualitative
  - Leading & lagging indicators
  - Perspectives: financial, customer, internal, learning & growth
- Terminology
  - Objectives, measures, initiative, milestone
  - Scorecard, portfolio, theme

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Case Study: Clothes Horse

Clothes Horse Executive Leadership Team Strategy Meeting

Clothes Horse is an operating division of Fashion Fit Co. - a large American retail corporation with 200 outlets throughout the United States. Clothes Horse's women's clothing and accessories are targeted at 20-40 year old working women with an average income of $35,000 who are either "fashion forward" customers or are seeking a French fashion style.

Whilst Clothes Horse had successfully created and exploited this formula, the market has now become increasingly competitive with a segmented and demanding customer base and an increasing number of retailers fighting for the customer's "share of wallet". Changing fashion tastes also threaten to erode the customer base.

Clothes Horse has focused on maintaining their dominant position through innovative fashion design. Consequently, operational efficiency is sub-optimal; for example; its use of technology has been inefficient and has failed to bring Clothes Horse the benefits some of its industry peers have seen.

The company recognises its strengths; it had a good design formula and its customer retention was superior to its competitors. However, these advantages cannot be taken for granted in the new competitive climate.

Clothes Horse has been directed by Fashion Fit Co. to double its revenues from $1.5 billion to $3 billion in five years whilst maintaining a gross profit growth rate of 20% per annum.

At a recent meeting the Executive Leadership Team discussed how they were going to achieve these goals. Focus was required in a number of different areas of the organisation, e.g. product quality, fashion & design, inventory control, relationship with suppliers. However, it was decided at this stage to limit the discussion to focus on two themes:

1. Establishing an effective pricing strategy
2. Promoting the brand

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Discussion Highlights

"Making the most of our current customer base is one key to increasing revenues," said Mohammed Monet, the company's Marketing Director. "We should convince our existing customers to buy complete outfits, not just individual items and keep them coming back to Clothes Horse. At the same time, we should attract more young professional women into our stores."

"A focused brand image will help us reactivate our current customers while also attracting new customers to the store," said Public Relations Director Mel Avery. "Our advertisements and in-store promotions should reflect who customers aspire to be while still relating to their personalities and lifestyles. The Clothes Horse brand should be recognised for its reputation for quality and style."

"Technology can help us solve other internal problems," said IT Manager Noel Huntington. "If we are planning to validate the quality and design of our products through a product testing program in pilot stores, we will need a good system to help us process and manage the resulting data".

"It's not enough to just put systems in place," said Amanda Jacobs, VP of Human Resources. "Ultimately it is the employees who are going to make things happen. If we are to realise these new initiatives, we have to ensure that the employees acquire relevant skills in merchandising, marketing, sourcing and planning so they can contribute to achieving Clothes Horse's strategic objectives."

"Our competitors have started campaigns to attract Clothes Horse's loyal customers," said Marion Williams, a Regional Manager. "Whereas customers used to come to us for leading-edge fashion, customers are beginning to browse and compare our styles, prices and quality with other retailer's lines, some of which include cheaper replicas of our merchandise. We must communicate the benefits of the Clothes Horse brand clearly and also take customer behaviour into account when we define our pricing strategies."

"Although we don't want to be seen as a discount brand," said Monet, "we need to balance our pricing against the customers' perception of our value. Getting our prices right the first time is important."

"It's also vital that we keep our employees happy," added Jacobs. "We need to work harder on establishing the best climate for our employees to support the radical performance improvement that we expect from them."

What you need to do:

- Using the information supplied, come up with a set of objectives for each of the four perspectives; there will be 2 or 3 objectives for each perspective. Use the themes as a guideline and ensure that you are clear on which objectives fall into which themes.
- For each of the objectives, suggest a measure and at least one initiative.
- Select a couple of initiative and create at least two milestones for each initiative.
- Bear in mind that some of the information could be irrelevant.

An empty table and a blank thematic linkage diagram have been provided to assist you overleaf.

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Financial Objectives	Measures	Initiatives	Milestones

Customer Objectives	Measures	Initiatives	Milestones

Internal Objectives	Measures	Initiatives	Milestones

Learning & Growth Objectives	Measures	Initiatives	Milestones

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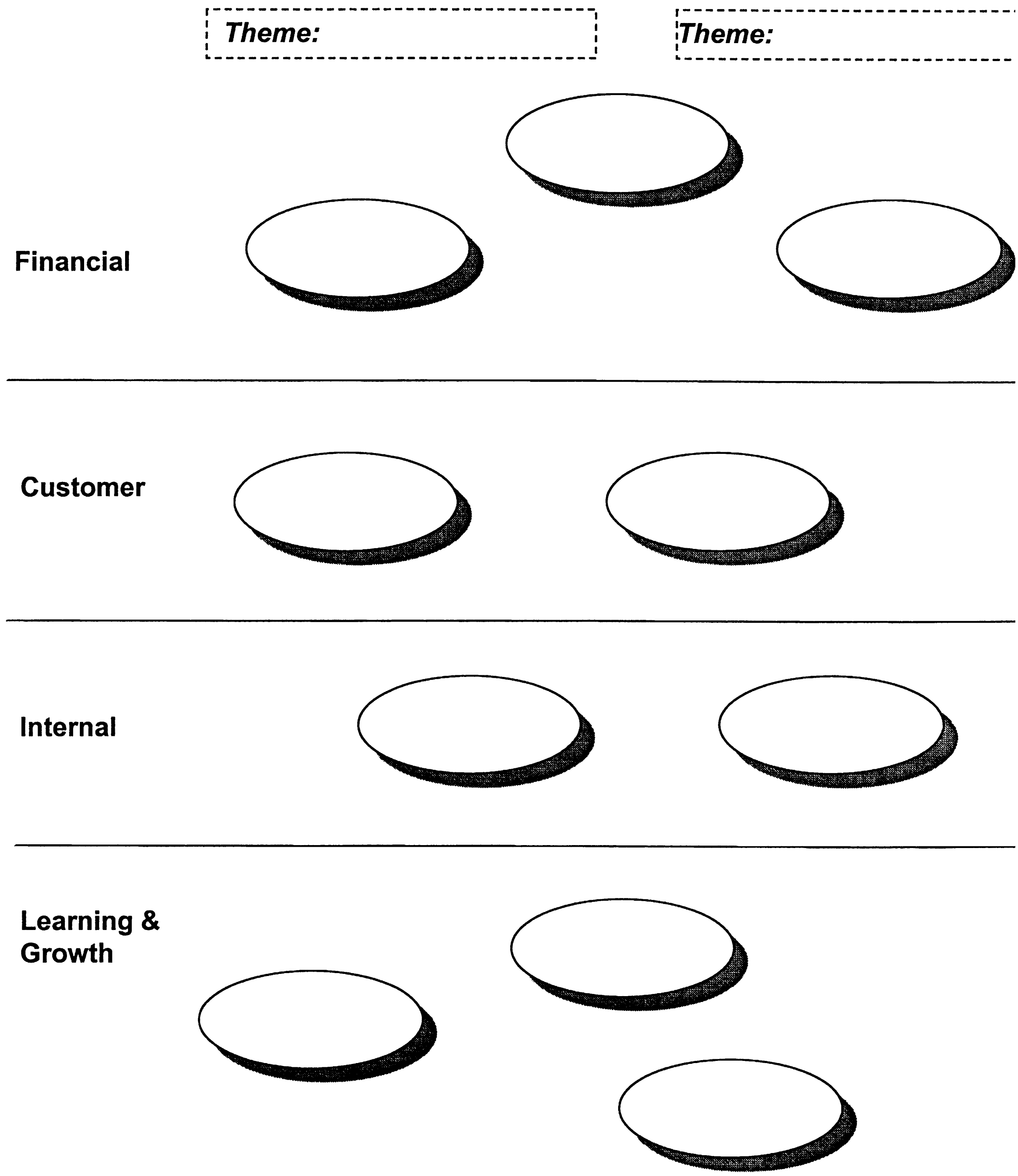
Thematic Linkage Diagram



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Financial Perspective

Strategic Objectives	"Do Wells"	Measures	Story Quotes	Initiatives
Increase Profitability Improve sales and manage our inventory to hit target gross profit growth rate of 20% p.a.	See rest of Scorecard	Gross Profit Growth SPF per store	"Clothes Horse was directed by Fashion Fit Co. to double its revenues … gross profit growth rate of 20% per annum."	Reduce overhead costs Reduce working capital
Increase Penetration Increase penetration of the existing customer base by providing the image, product line and shopping experience our customer wants.	Sell outfits Reactivate customers Keep customers happy Provide good shopping experience	Share of Wallet Size of transaction	"Making the most of our current customer base is one key to increasing revenues."	Develop loyalty schemes for major markets Customer service & signage
Grow Customer Base Grow the customer base by attracting more women in the target customer segment.	Increase store traffic Increase brand recognition	Like to like sales	"… attract more young professional women into our stores."	Market-specific advertising & promotions

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Customer Perspective

Strategic Objectives	"Do Wells"	Measures	Story Quotes	Initiatives
Price/Benefit Provide high quality fashion at the right price first time	Get price right first time Test customer perception	MMU (vs. benchmark) by category	"… balance our pricing against the customers' perception of our value."	Test market
Brand Awareness Create a focused, aspirational brand identity, that corresponds to customers' lifestyles and personalities	Advertise Conduct in-store promotions	# of branded items sold	"A focused brand image … reflect who customers aspire to be while still relating to their personalities and lifestyles."	Advert't campaign Promotion programmes

Internal Perspective

Strategic Objectives	"Do Wells"	Measures	Story Quotes	Initiatives
Pricing Strategies Develop a clear understanding of how our pricing strategies affect our customer behaviour so that we may adjust those strategies to maximise our economic return	Develop pricing strategy Understand the customer	Markdowns	"… take customer behaviour into account when we define our pricing strategies."	Develop pricing strategy
Promote Brand Equity Improve our ability to define the benefits of our brand and effectively communicate those benefits to the market	Define brand value Communicate brand benefits	Customer programme response Brand awareness survey value	"… communicate the benefits of the Clothes Horse brand clearly."	Define brand Communicate brand benefits

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Learning & Growth Perspective

Strategic Objectives	"Do Wells"	Measures	Story Quotes	Initiatives
Develop Strategic Jobs/Skills Build skills to improve merchandising, marketing, sourcing and planning abilities	Provide training Analyse skill gaps	Strategic skills coverage	"… ensure that the employees acquire relevant skills in merchandising, marketing, sourcing and planning…."	Training programmes
Provide Strategic Information and Technology Tools Use technology to aid in capturing and using information about current and potential customers and competitors and utilising testing data efficiently	Plan technology needs Assess current technological capabilities	Progress vs. systems development plan	"… Technology can help us solve other internal problems … good system to help us process and manage the resulting data."	Acquire technology and related expertise. Learn to analyse customer & competitor information
Create a Climate to Support Personal Growth Develop a clear strategic vision and communicate it to the organisation, help employees balance personal and work needs and interests to improve morale and improve opportunities for people to advance within the organisation	Communicate with employees Plan promotion rates	Climate survey (associate / employee feedback) Internal promotion rate (vs. plan) Employee turnover (by cause)	"… keep our employees happy … establishing the best climate for our employees to support the radical performance improvement that we expect from them."	Employee survey to establish morale and key issues Develop comm'n process Enhance appraisal system to include career plans & promotion

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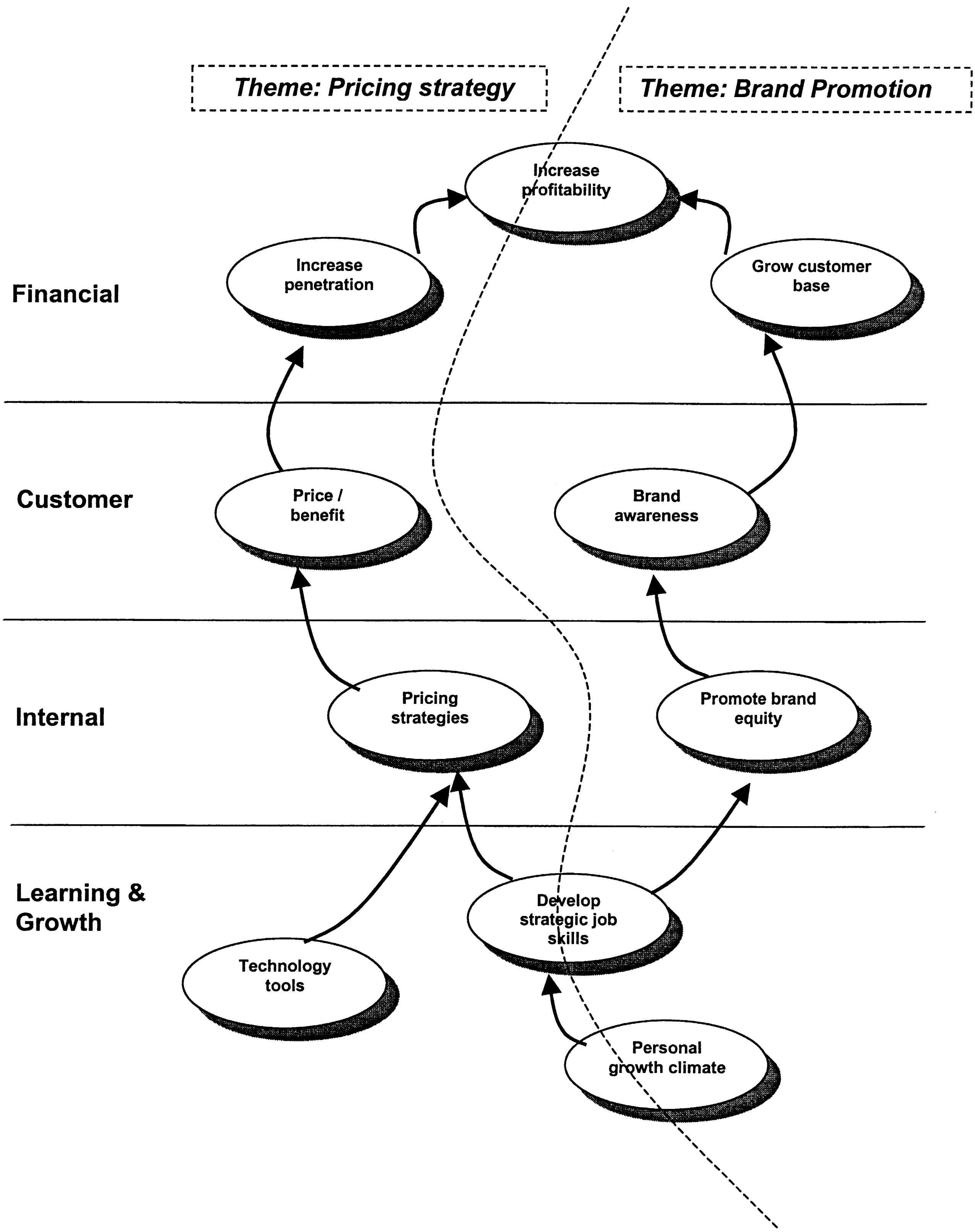
Thematic Linkage Diagram



1. Using the Balanced Scorecard

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This section focuses on how to use a developed Balanced Scorecard Application. The Instructor will either present the slides in this section, or will demonstrate the application.

Using the Scorecard

- Using a developed scorecard application
- Home page, menu options
- Portfolio, scorecard, initiative, measure analysis pages
- Reminders
- Assessments, definitions, comments, milestones
- Trend analysis, charts
- Thematic linkage diagram
- Mission statement
- Reports

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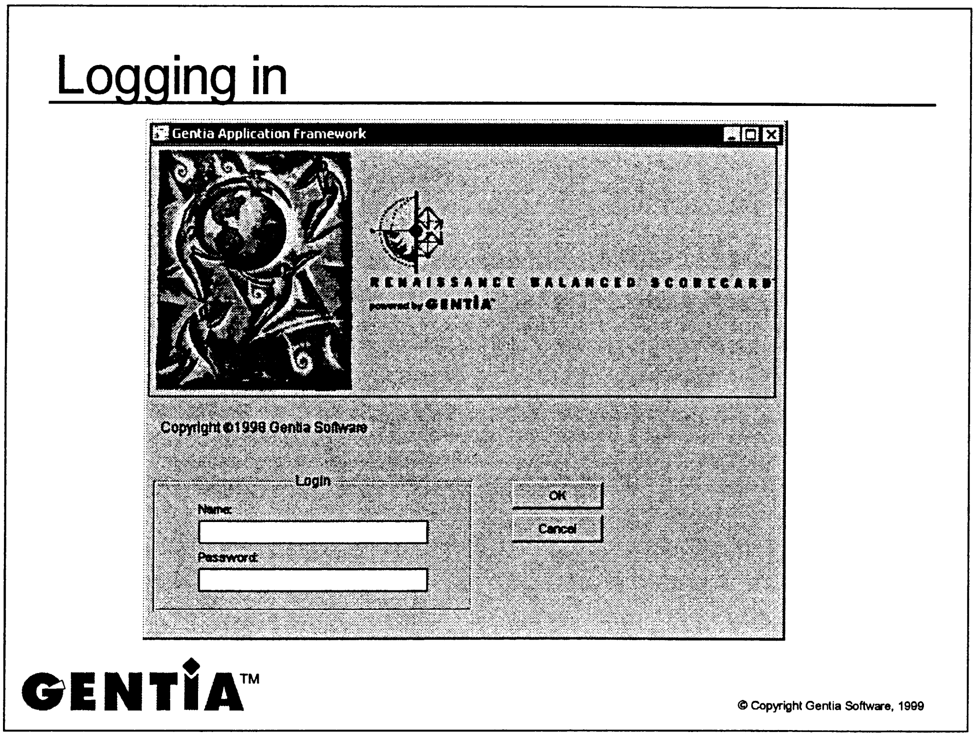
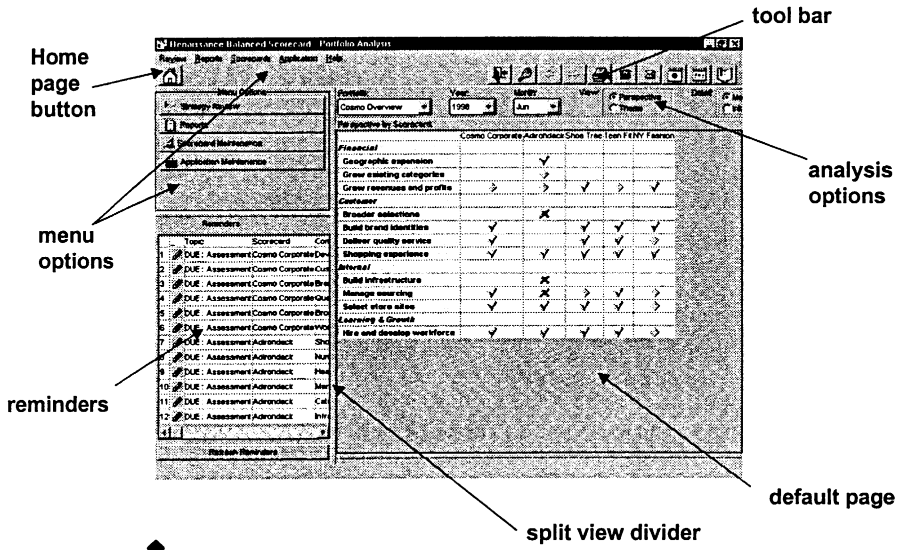


This is the first page in the RBSC application, prompting you to supply a username and password.

Enter your name and if necessary, the password.

Clicking on *OK* or pressing *Enter* will take you to the home page.

The Home Page



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The home page is the first page after logging in.

Home page button

This can be found in the top left-hand corner of every page in the application and is used to navigate to the home page.

Tool bar

The set of buttons displayed at the top of every page in the application. This will be covered in more detail later.

Menu options

This section is displayed in the top left-hand corner of the home page. This will be covered in more detail later.

Reminders

This is displayed in the bottom left-hand corner of the home page. This will be covered in more detail later.

Analysis options

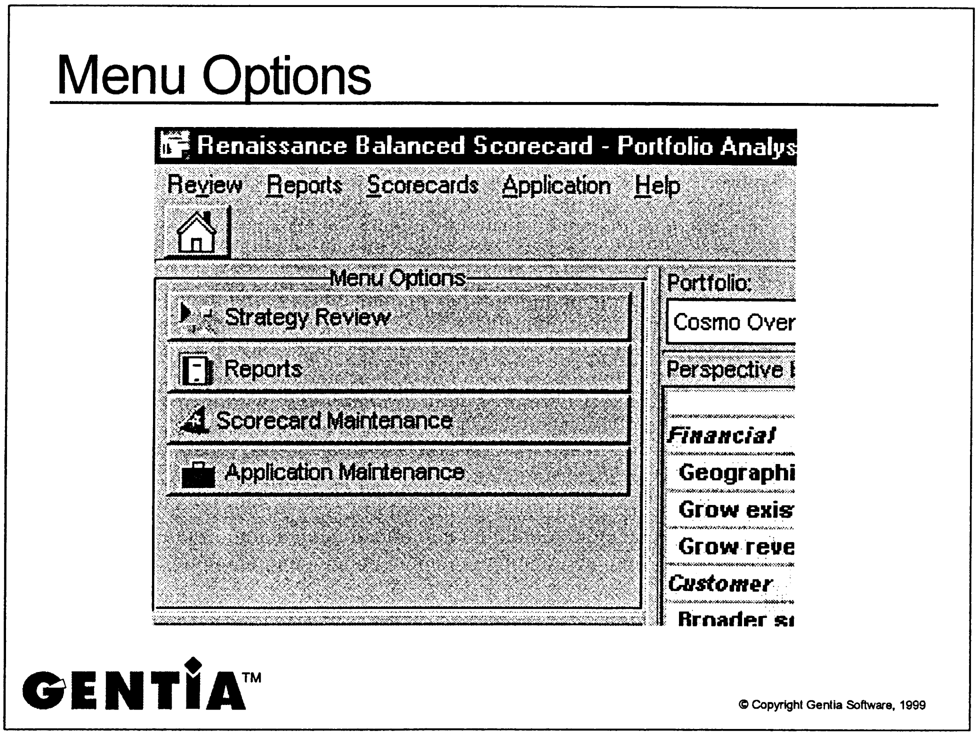
These are displayed at the top of the home page. This will be covered in more detail later.

Default page

This forms the main body of the home page and will display the *portfolio analysis,* unless you have specified an alternative default page. This can be done by selecting *Application Maintenance, User Defaults* from the menu options.

Split view divider

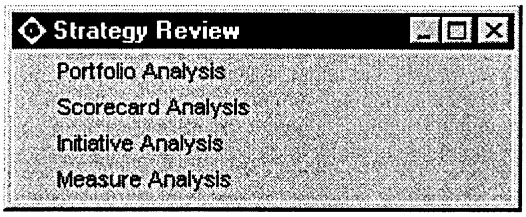
Used to change the amount of space allocated to the *Reminders* view and the analysis table on the right-hand side.



Strategy Review

Allows the user to switch between:

Portfolio Analysis,
Scorecard Analysis
Initiative Analysis and
Measure Analysis



Reports

Provides access to the scorecard reports that are available for you to print: Portfolio report or Scorecard report

Strategy Maintenance

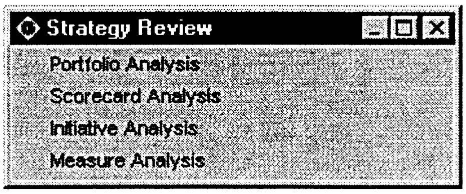
Provides access to the functions required for building and updating a scorecard application. More on this in a later section.

Application Maintenance

Provides access to the functions required for the maintenance of a scorecard application. Some of the options can only be accessed by an RBSC administrator. More on this in a later section.

Menu Option: Strategy Review

- Portfolio analysis
  - Default first analysis page
  - Default home page
- Scorecard Analysis
- Initiative Analysis
- Measure Analysis



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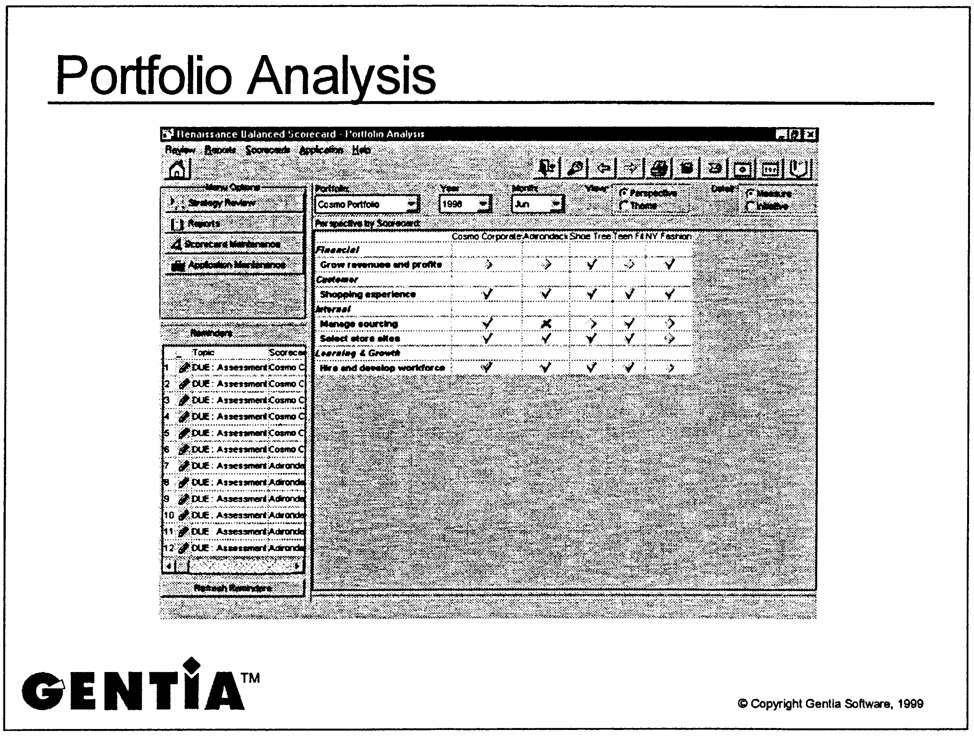
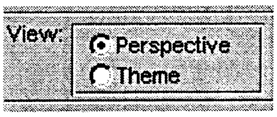


The portfolio analysis option displays a table with a view of the scorecards contained within the selected portfolio. Remember that a portfolio is a series of objectives that are contained within a number of scorecards.

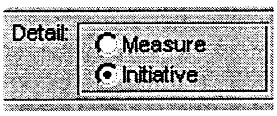
You can switch between portfolios using the pull-down list above the table.

Each scorecard appears as a columns.

The associated objectives appear as rows, grouped either by perspective or theme and you can toggle between perspective or theme using the *View* radio buttons above the table.



For each objective, you can view the associated measures or initiatives, by using the *Detail* radio buttons above the table. Clicking on the objective will then display the required detail.



The *Year* and *Month* pull-down menus above the table allow you to focus on a different time period. By default, the current year and month will be displayed.

From *Portfolio Analysis* you can select another portfolio or you can select a particular scorecard by clicking on the appropriate column heading and then selecting *Analyze scorecard* from the pop-up menu.

Portfolio View: Perspective / Theme

Perspective by Scorecard:
Financial
Grow revenues and profits
Customer
Build brand identities
Deliver quality service
Shopping experience
Internal
Manage sourcing
Select store sites
Learning & Growth
Hire and develop workforce

Theme by Scorecard:
Brand dominance
Build brand identities
Broaden merchandise lines
Grow revenues and profits
Manage sourcing
Hire and develop workforce
Customer loyalty
Shopping experience
Develop flagship stores
Grow revenues and profits
Shopping experience
Select store sites
Hire and develop workforce
Quality service
Deliver quality service
World class talent
Hire and develop workforce

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Viewing the objectives by *perspective* shows the objectives in each of the perspectives and since an objective can only be associated with one perspective, each objective appears only once.

Viewing the objectives by *theme* will display all the objectives associated with each theme, which potentially displays an objective a number of times since an objective can be part of more than one theme.

For example, the objective to *Hire and develop workforce* is part of 3 different themes and therefore appears 3 times in the *theme* view, but just the once in the *perspective* view, within the *Learning & Growth* perspective.

Assessments

perspective
objective
measures

Perspective by Scorecard:

	Cosmo Corporate	Adirondack	Shoe Tree	Teen Fit	NY Fashion
Financial					
Grow revenues and profits	◇	✗	✓	◇	✓
Profit	◇	◇	✓	✗	◇
Revenue	✗	▬	✓	✓	✓
Customer					
Build brand identities	✓	▬	✓	✓	✓
Deliver quality service	✓	▬	✓	✓	◇
Shopping experience	✓	✓	✓	✓	✓
Internal					
Manage sourcing	✓	✗	◇	✓	✓
Select store sites	✓	✓	✓	✓	◇
Learning & Growth					
Hire and develop workforce	✓	✓	✓	✓	◇

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However you choose to display the objectives, the table will show the assessments made for each objective and its associated measures or initiatives.

Notice that that is no assessment made at the perspective or theme level.

The assessments are detailed overleaf.

Assessment Indicators

assessment on track

transition in progress

assessment off track

assessment outstanding

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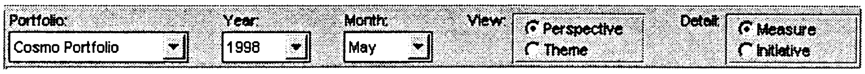
The success of objectives, measures and initiatives are shown using the indicators above. The indicator is manually submitted by the owner, who assesses the performance based on the numerical data available and their own information and comments.

The yellow diamond indicates that some sort of transition is in progress and that the goal (initiative, measure or objective) has neither been achieved nor unachieved.

Analysis Options

- Select portfolio
- Change Year and Month
- Change View: Perspective / Theme
- Change Detail: Measure / Initiative



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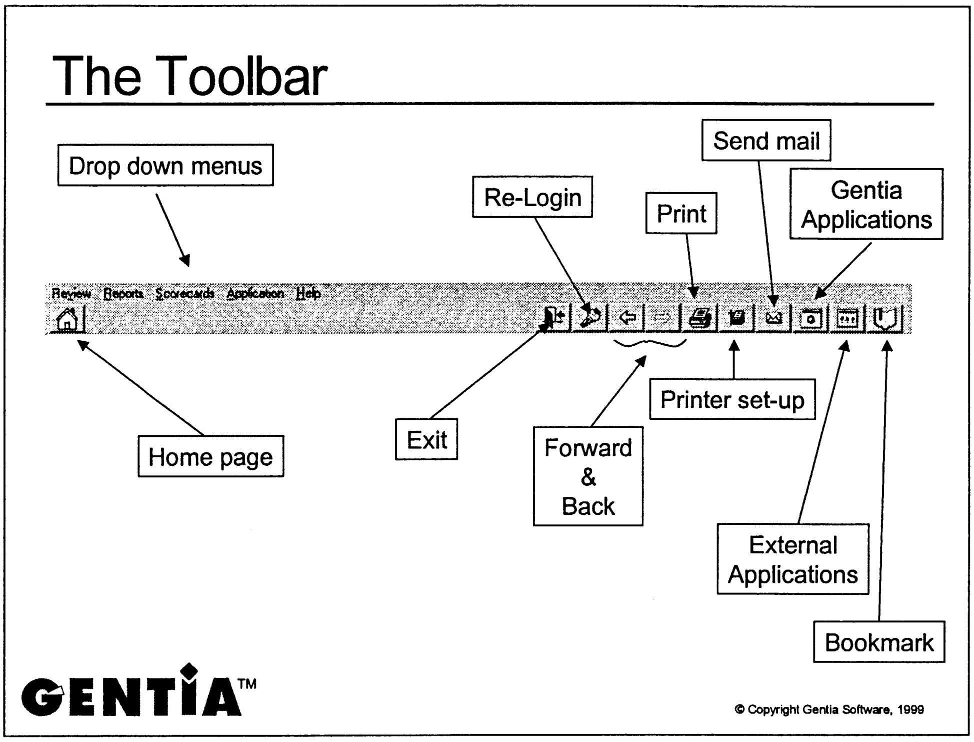
The area immediately above the table allows you to switch between portfolios and focus on a different year and/or month and group the objectives by either perspective or theme (as already discussed).

Each objective has measures and initiatives associated with it and the *Detail* section of the toolbar allows the user to decide which will be displayed when drilling down on the objectives.



The main toolbar appears at the top of every page.

It has a button to return the user to the home page and a number of buttons to navigate around the available pages.

The *External Applications* button allows the user to drill through into other applications such as Word or Excel.

The *Bookmark* button allows the user to mark a specific page as a *favourite* in order to be able to quickly return to it at a later stage.

Reminders

Reminders

	_	Topic	Scorecard	Component	Period	Year	From	Date	Time
1		DUE : Assessment	Cosmo Corporate	Develop flagship stores	Jun	1998	Automatic	Jan 27 1999	10:04:27
2		DUE : Assessment	Cosmo Corporate	Customer loyalty	Jun	1998	Automatic	Jan 27 1999	10:04:27
3		DUE : Assessment	Cosmo Corporate	Brand dominance	Jun	1998	Automatic	Jan 27 1999	10:04:27
4		DUE : Assessment	Cosmo Corporate	Quality service	Jun	1998	Automatic	Jan 27 1999	10:04:27
5		DUE : Assessment	Cosmo Corporate	Broaden merchandise lines	Jun	1998	Automatic	Jan 27 1999	10:04:27
6		DUE : Assessment	Cosmo Corporate	World class talent	Jun	1998	Automatic	Jan 27 1999	10:04:27
7		DUE : Assessment	Adirondack	Shopping experience rating	Jun	1998	Automatic	Jan 27 1999	10:04:28
8		DUE : Assessment	Adirondack	Number of sites	Jun	1998	Automatic	Jan 27 1999	10:04:28
9		DUE : Assessment	Adirondack	Headcount	Jun	1998	Automatic	Jan 27 1999	10:04:28
10		DUE : Assessment	Adirondack	Market penetration	Jun	1998	Automatic	Jan 27 1999	10:04:28
11		DUE : Assessment	Adirondack	Category range	Jun	1998	Automatic	Jan 27 1999	10:04:28
12		DUE : Assessment	Adirondack	Infrastructure rating	Jun	1998	Automatic	Jan 27 1999	10:04:28

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The *Reminders* section forms part of the home page and will be updated when you login to the RBSC application and when you click on the *Refresh reminders* button.

It shows all the comments and assessments that are significant to the user. If no reminders exist for a user, a message will be displayed accordingly.

The reminders are displayed in a table which contains a number of columns. You will probably need to drag the split view divider to the right in order to see all the information for each of the reminders in the list. The columns are as follows:

reminder type - icon depicting whether the reminder is a comment (envelope icon - not shown) or an assessment (pencil icon)

topic name - contains a prefix to indicate the type of reminder:

DUE	an overview assessment owned by you
BMK	a book-marked comment or assessment
FWD	a comment or assessment forwarded to you from another user
AUTO	a comment automatically forwarded to you because you own the scorecard component referred to in the comment

scorecard - name of scorecard to which the reminder relates

component - name of the scorecard component to which the reminder relates

period - time period to which the reminder relates

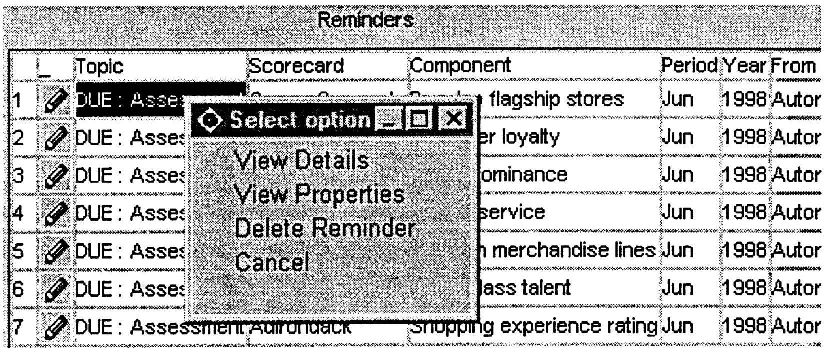
year - the year to which the reminder relates

from - the name of the user who sent the reminder

date - the date when the reminder was sent

time - the time when the reminder was sent

Viewing a Reminder



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Clicking on a reminder will display a menu.

View Details will replace the home page by an analysis page that displays the relevant comment of assessment.

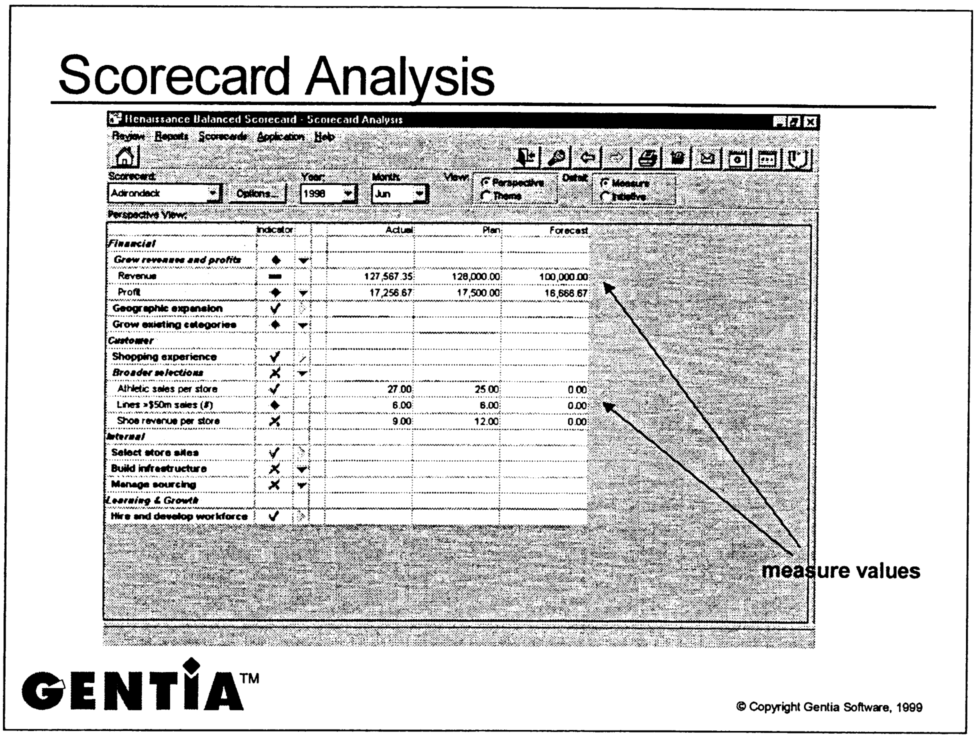
View Properties will display more information about the reminder, which is useful if you prefer not to drag the split view divider over to the right-hand area of the page.

Reminders can be created in different ways:

A reminder will automatically be created if you are the owner of a scorecard component which has an overdue assessment.

When you view a comment or assessment from the analysis pages, you can click on the bookmark button to send yourself a reminder, or the forward button to send a reminder to another user.

When a comment has been created or updated, a reminder will be sent to the owner of the relevant scorecard component.



Selecting *Scorecard Analysis* from the *Strategy Review* option in the menu, will display an individual scorecard and its objectives.

The layout is very similar to that of the portfolio analysis page.

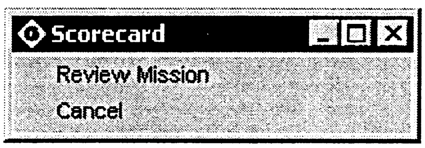
The objectives form the rows in the table and can be grouped by theme or perspective.

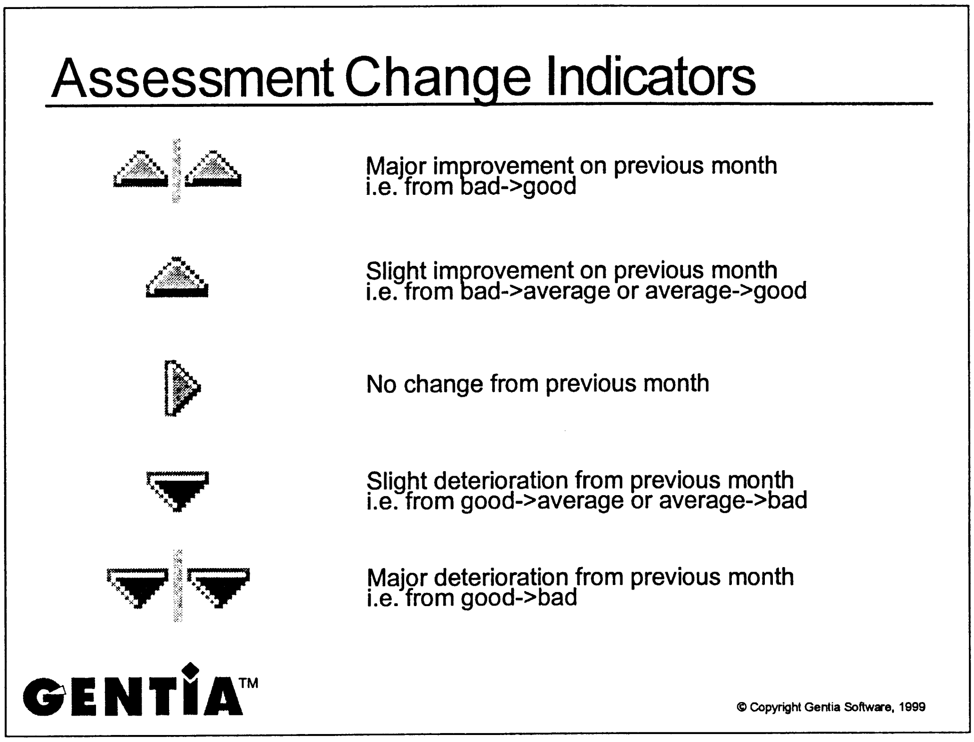
The columns contain assessment indicators (for the objective, measure or initiative) and assessment change indicators for the selected year and month (see next slide).

If measures are being displayed, 3 additional columns will be displayed, containing the actual, plan and forecast values for each measure.

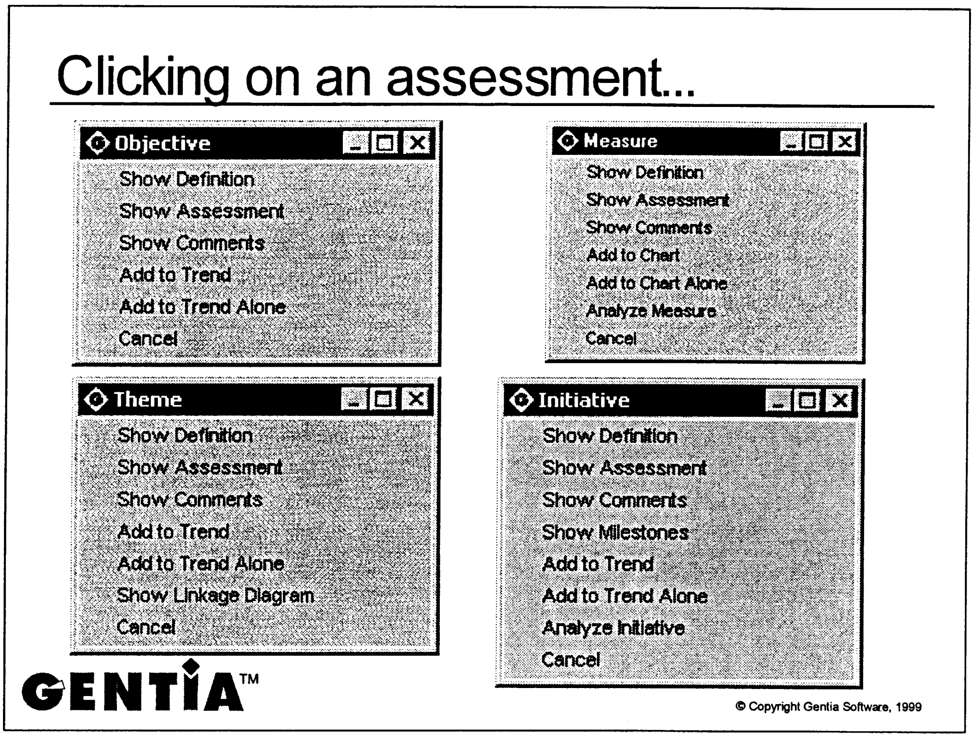
The analysis options above the table work in exactly the same way as for the portfolio analysis page.

The *Options* button allows the mission to be reviewed.





If there is no assessment in the previous month, the assessment change indicator will be blank.



By clicking on an assessment indicator, ( ) for a scorecard component, or on an assessment change indicator, the above menus appear each with further options.

The *Objective, Measure, Theme* and *Initiative* menus contain a number of option which are detailed more fully on the next few slides:

Show Definition
Show Assessment
Show Comments
Show Milestones - for initiatives only
Add to Trend / Add to Trend Alone

The *Theme* menu also allows the user to see the thematic *Linkage Diagram* - which pictorially represents the themes.

The *Initiative* menu also allows the user to move to the initiative analysis page - see later.

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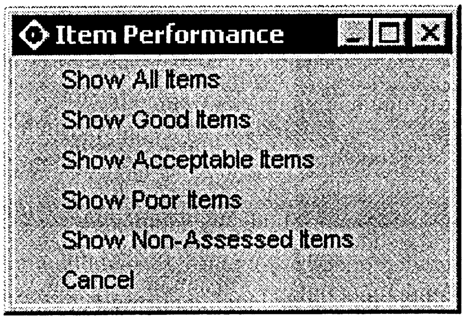
Clicking on a column header...



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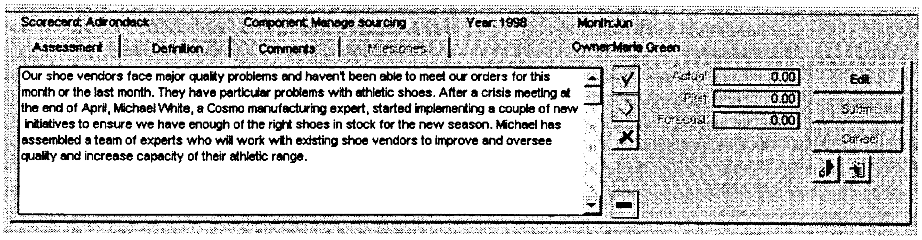
When using the scorecard analysis page, clicking on a **column header,** rather than clicking on an assessment, will display the *Item Performance* menu.

The options allow you to select different categories of items to view.

Assessments



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By default, the area at the bottom of the Scorecard analysis pages is hidden, but will be revealed when the information is requested by clicking on a scorecard component (theme, objective,measure, initiative), and selecting *Show Assessment*:

The **assessment**, **definition** and **comments** will be displayed for the selected component, as well as the milestones for an initiative.

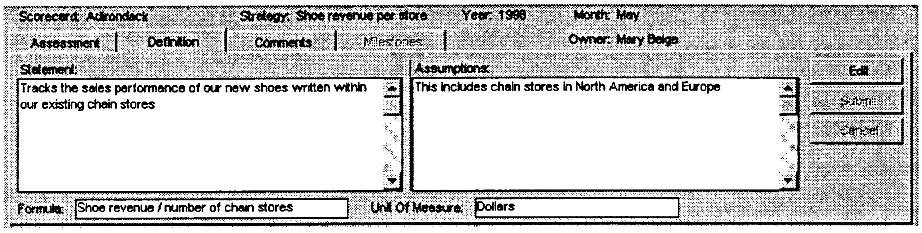
The **Assessment** consists of the assessment indicator together with a text area that can be used to provide details of the assessment. The assessment for a measure will also include the actual, plan and forecast values for that measure.

The *Edit* button allows the user create or update an assessment if you are the owner of the component or if you are an RBSC Administrator. You can enter text into the text area and, in the case of measures, numerical values. Click on the *Submit* button to save your changes.

 You can bookmark the assessment which will put an entry into the reminders window.

 You can forward the assessment to other users, which will send the assessment to the selected users' reminders windows.

Definitions



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The information in the definition section depends on the type of selected scorecard component, as follows:

Theme - statement

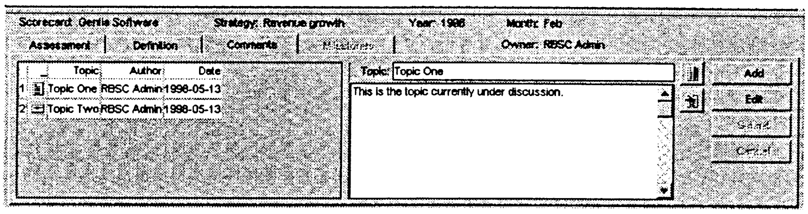
Objective - statement

Measure - statement, assumptions, formula, unit of measure (as illustrated above)

Initiative - charter (i.e. description of initiative), team members

N.B. You cannot create or amend definitions from this page. This can be done using the wizards described later.

Comments



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The *Comments* section contains a list of all the comments for the selected scorecard component with topic, author and date (of creation or last update).

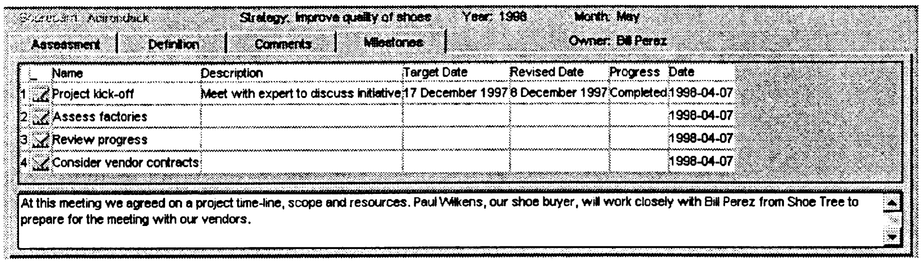
Selecting a topic on the left-hand side will display the text of the comment on the right-hand side. The vertical split view divider between the text area and comment list area allows you to change the proportion of screen devoted to the two areas.

Any user can create a new comment using the *Add* button. *Submit* will save the comment. A reminder will be sent to the owner of the component.

The owner of a comment of the RBSC administrator can change a comment using the *Edit* button. *Submit* will save the change.

As with assessments, you can use the buttons to *Bookmark* and *Forward* the comments.

Milestones



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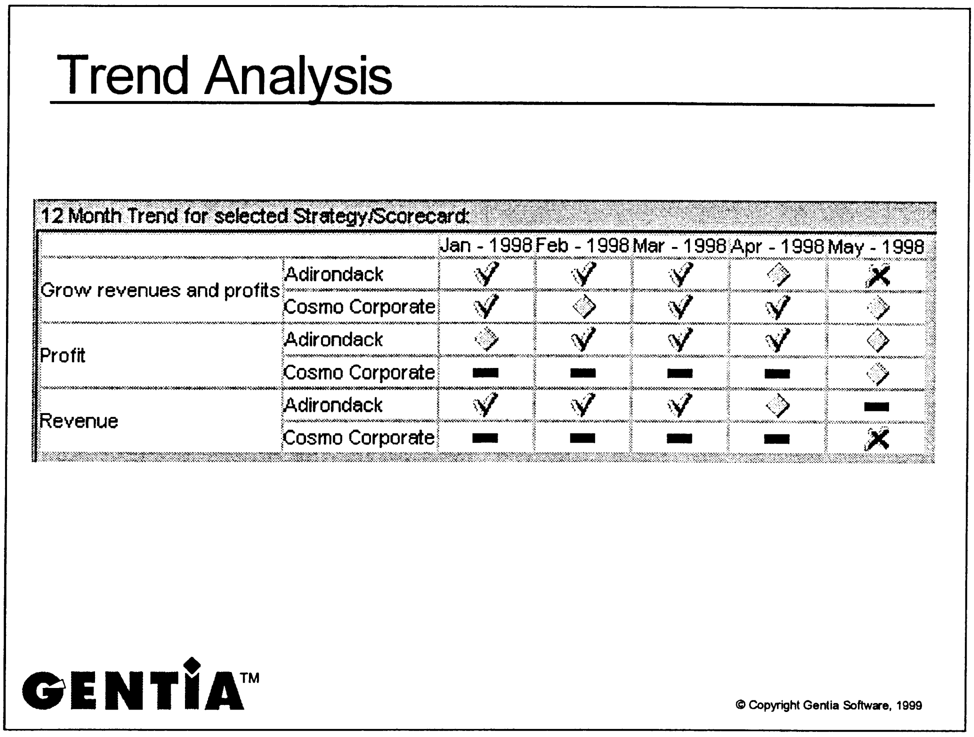
When you click on the name of an initiative on one of the analysis pages, you can select *Show Milestones.*

A list will be displayed with the name, description, target date, revised data, progress, date (of creation or last update) and author of each milestone.

Selecting a milestone will reveal the details of an individual milestone in the area underneath the the list of milestones.

N.B. Milestones cannot be created or amended from here. This can be done using the wizards described later.



Trend analysis is available to help the user track performance over a set period.

Add to Trend allows the user to see the assessments for a group of scorecard components (objectives, measures, themes or initiatives) over the year. If the user is only looking at March (for example) then Jan, Feb and Mar will be shown.

Add to Trend Alone allows you to view the trend for only one component

The trend analysis feature can display the assessment indicators for a mixture of scorecard components. The slide above is displaying trends for an objective as well as a trend for its underlying measures.

If sufficient data is available, the trend analysis will include the 12 months up to and including the selected period. If any data does not exist, only the available data will be shown.

If a different time period is selected, the trend display will automatically update.

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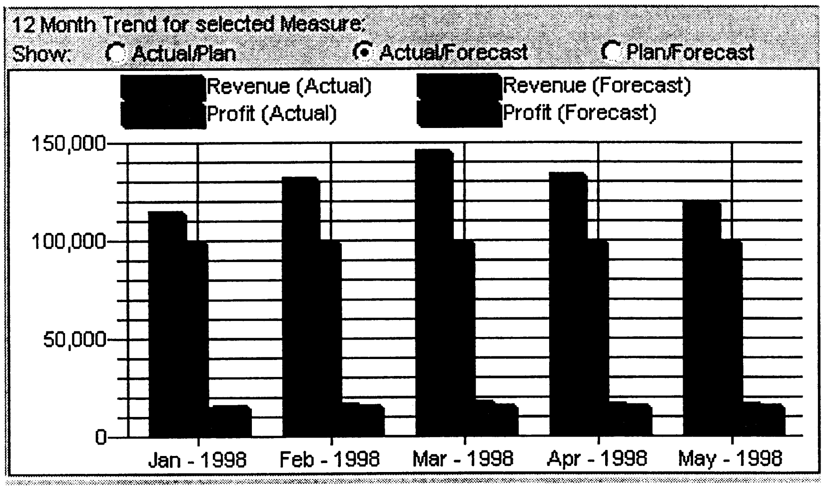
Charting Trends



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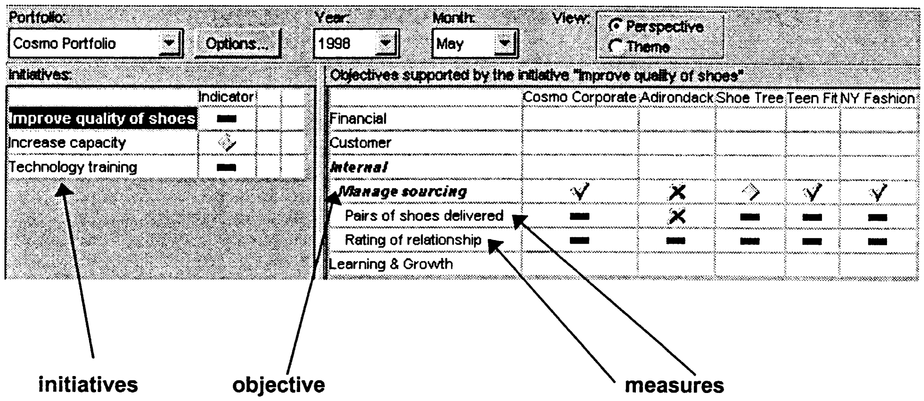
When viewing a scorecard (in the scorecard analysis page) and displaying measures rather then initiatives, a chart of the trend data can be displayed for the actual, plan and forecast items.

The chart is located on the right-hand side of the page, below the trend analysis table, but above the *Assessment/Definition/Comment* area and can be accessed by dragging the split view divider.

Once the chart has appeared, the user has the option to view the data as Actual/Plan, Actual/Forecast or Plan/Forecast using the radio buttons on the chart.

Initiative Analysis



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Initiatives can be viewed in more detail using the initiative analysis page, which can be accessed by:

• clicking on the assessment indicator for an initiative and selecting *Analyze Initiative.*

• clicking on the *Strategy Review* menu button and selecting *Analyze Initiative.*

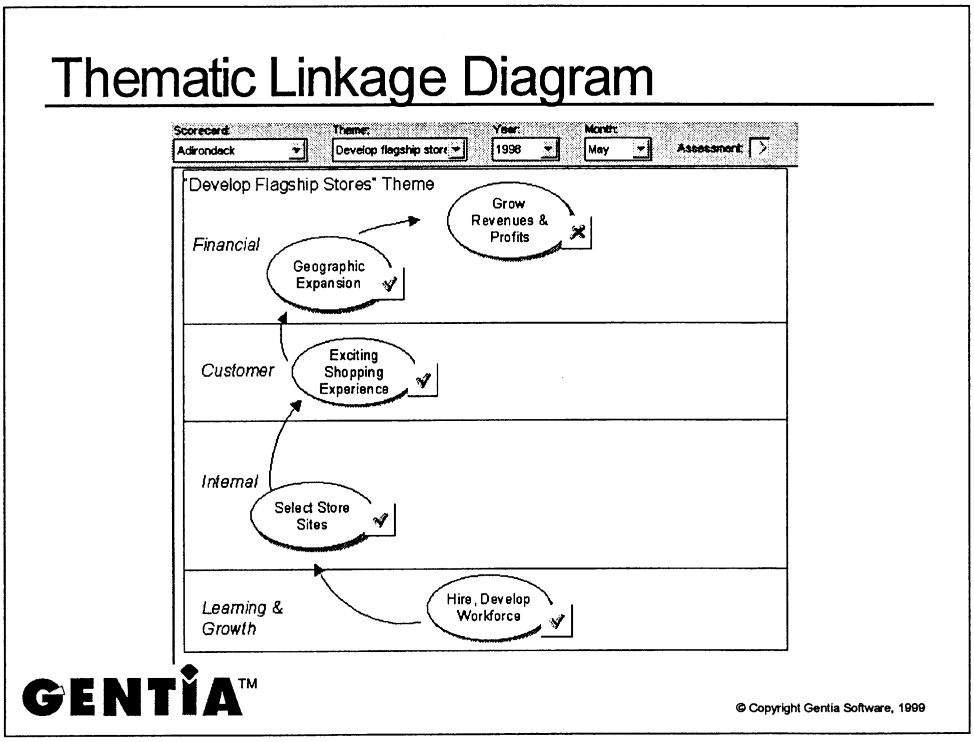
Two tables are displayed:

The left-hand table contains the initiatives (listed as rows) for the currently selected portfolio, with the selected initiative highlighted. The columns contain the assessments for each initiative in the portfolio.

The right-hand table shows the objectives associated with the selected (highlighted) initiative as well as the measures, if you drill-down. The columns contain the assessments for each scorecard within the portfolio.

As with the scorecard and portfolio analysis pages, you can click on an individual assessment for further options.

Two split view dividers exist at the bottom of the page, the upper one to reveal an area for trend analysis, the lower one to display narrative information, i.e. assessments, definitions, comments and milestones.



If you click on the assessment for a theme on any of the analysis pages, a menu appears allowing you to select *Show Linkage Diagram.*

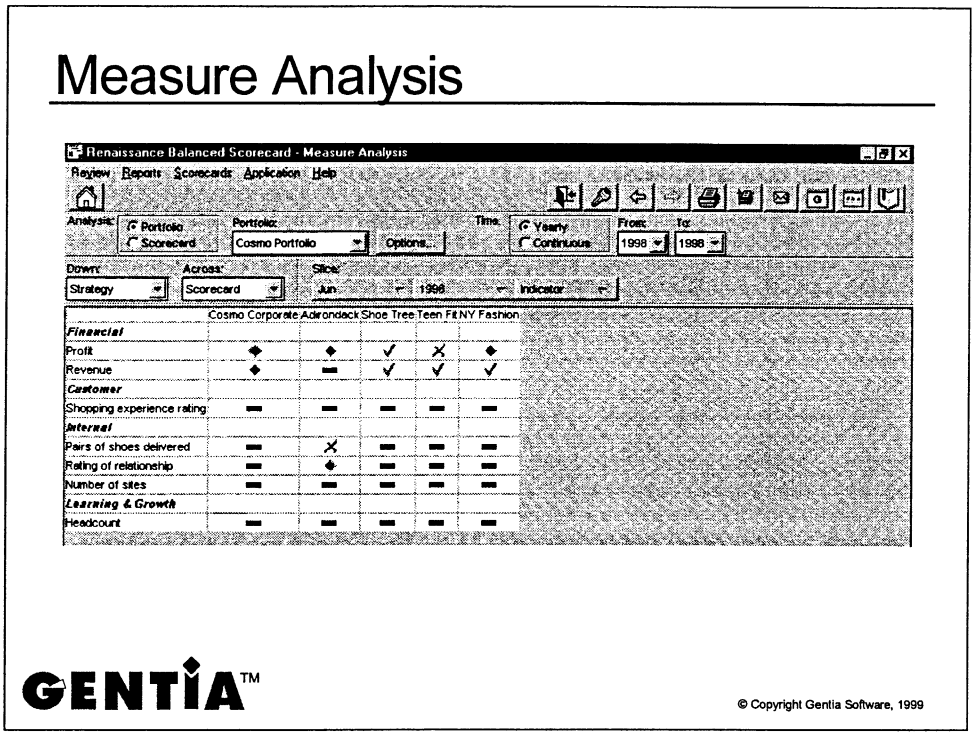
The analysis page will be replaced by a scorecard-specific linkage diagram showing the objectives for the selected theme and current time period.

Linkage diagrams are also known as cause and effect diagrams. They illustrate how the objectives in a theme are linked together in order to implement a business strategy.

The bubbles are annotated with the assessment indicators for each objective and clicking on one of the assessment indicators will return you to the previous page.

An assessment for the theme is displayed above the linkage diagram.

You can switch to display other linkage diagrams using the pull-down lists above.

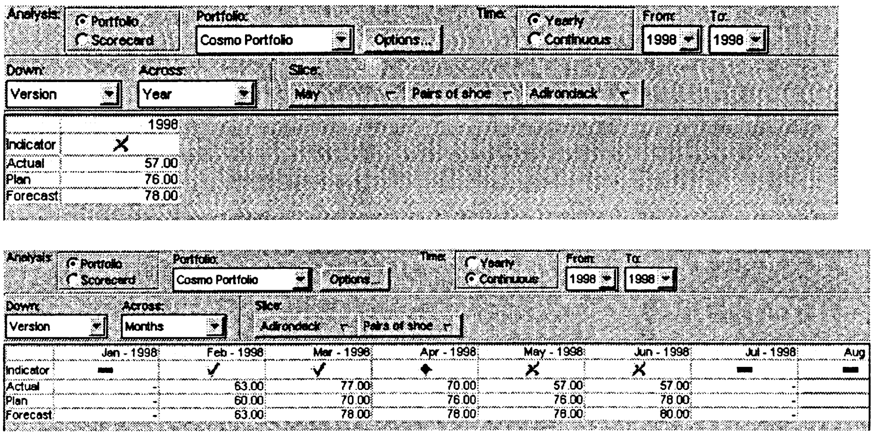


The *Measure Analysis* page allows for adhoc analysis of measures within a scorecard. It groups measures within perspectives. Objectives, themes and initiatives are not referred to or accessible in the Measure Analysis page.

The page displays the currently selected portfolio with measures listed in rows. However, if the previous page displayed was the Scorecard Analysis page the Measures Analysis page will display the measures for the scorecard.

Beneath the table is an area for textual information, such as mission statements, definitions, assessments and comments.

Measure Analysis



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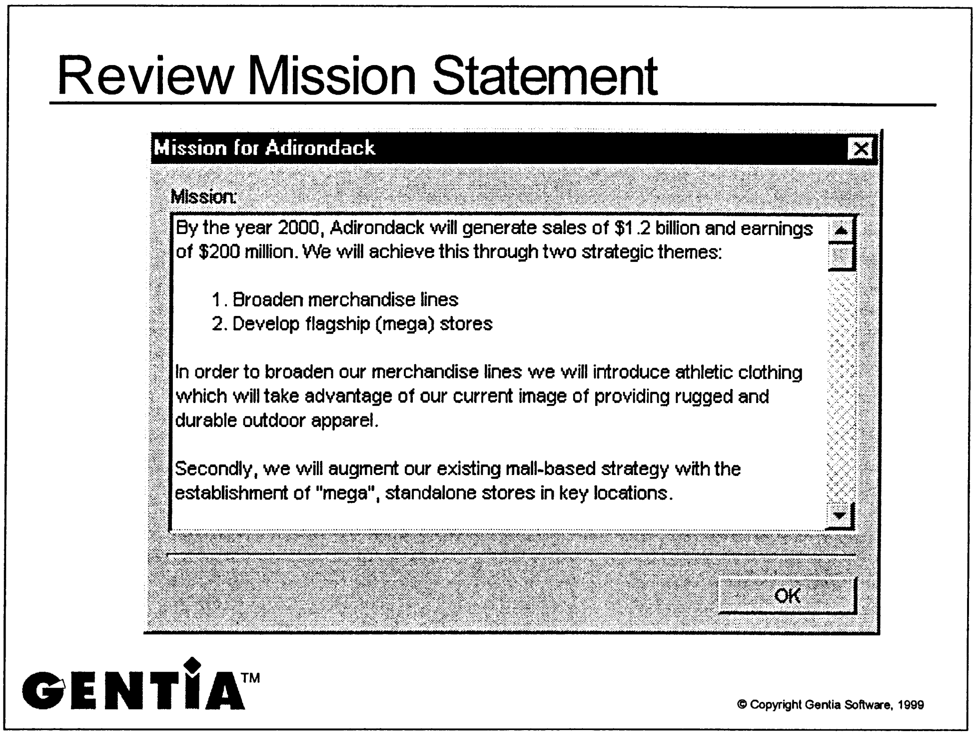
Select either a *Portfolio* or a *Scorecard.* The time dimension can be changed to show either years or the periods which make up the individual years (months or quarters). In addition, the displayed data (slice) can be rearranged on the screen.

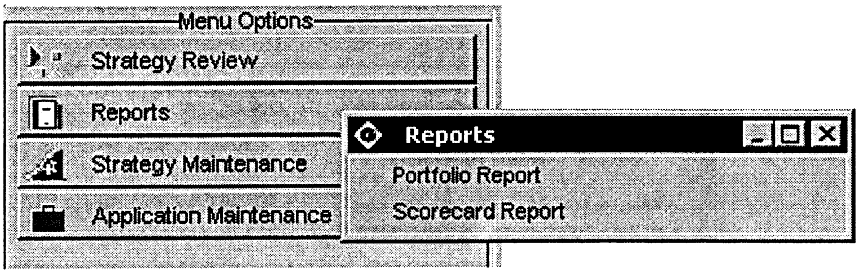


You can remind yourself of the mission statement for a scorecard, using one of the following methods:

When using the portfolio analysis or initiative analysis pages, click on the name of a scorecard (column heading) and select *Review Mission.*

In scorecard analysis, click on the *Options* button above the table and select *Review Mission* from the menu.

Reports



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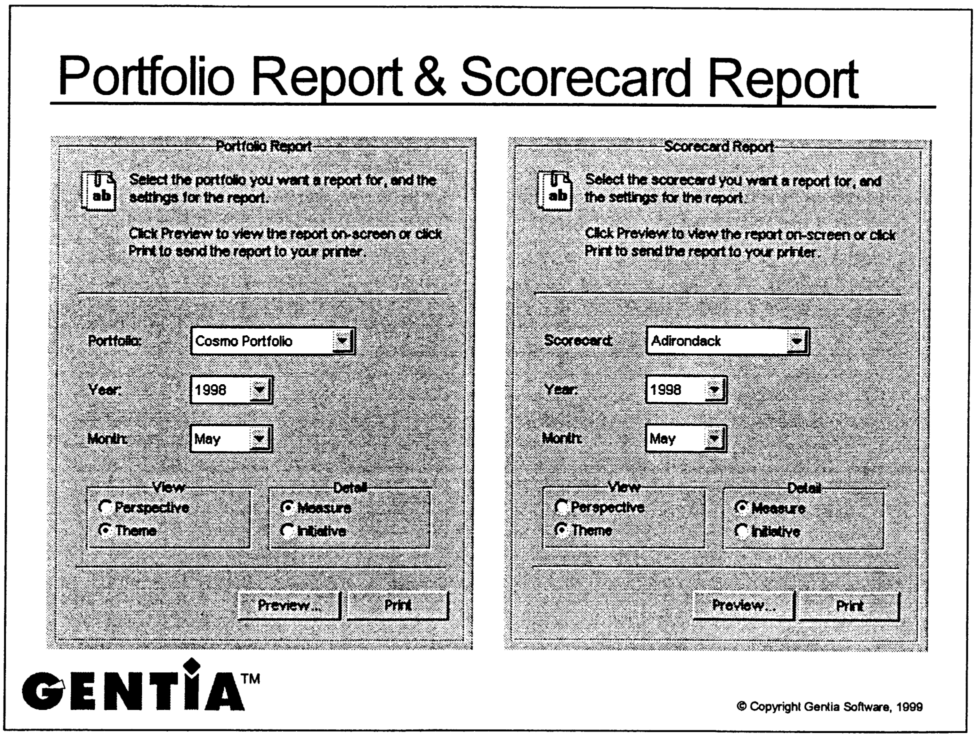
Selecting *Reports* from the menu options gives you two options which allow you to obtain printed reports that contain information similar to the analysis tables.



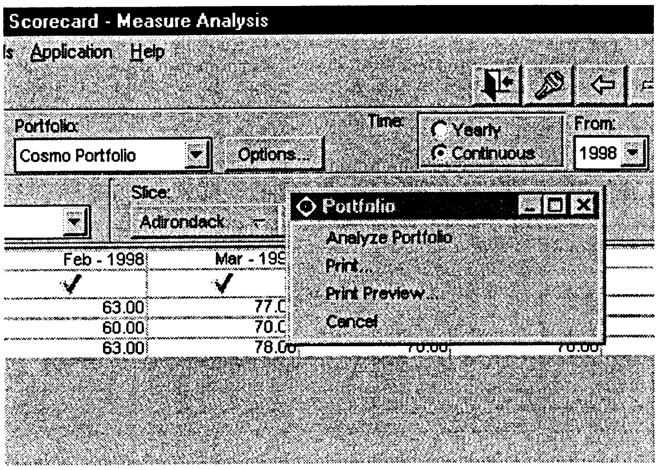
A dialog box will allow you to specify the details you wish to see in your report.

The *Preview...* button will allow you to view how the report will look before actually printing it.

The reports will contain tables with the objectives displayed as rows.

The portfolio report will have assessments for the scorecards in the columns and the scorecard report will have assessment indicators and assessment change indicators in the columns.

Measure Analysis Report



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By selecting *Options...* the popup menu allows the user to generate a report or preview the report before printing. The report will be what is currently shown on the screen.

Detailed Analysis of Measures

- Can navigate to a separate page providing more detail of a measure
- Info held outside of RBSC application
- This must be set up at the development level
- If set up, *Analyze Measure* option in menu when you click on assessment for the measure
- If not set up, no option in menu

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Summary

- Using a developed scorecard application
- Home page, menu options
- Portfolio, scorecard, initiative analysis pages
- Reminders
- Assessments, definitions, comments, milestones
- Trend analysis with charts
- Thematic linkage diagram
- Mission statement
- Reports

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Practical 1

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Aim: To learn how to navigate through a Balanced Scorecard application.

The following pages contain a series of steps which will navigate you through the Cosmopolitan Clothing balanced scorecard application. Work your way through the steps but feel free to experiment further, as you wish.

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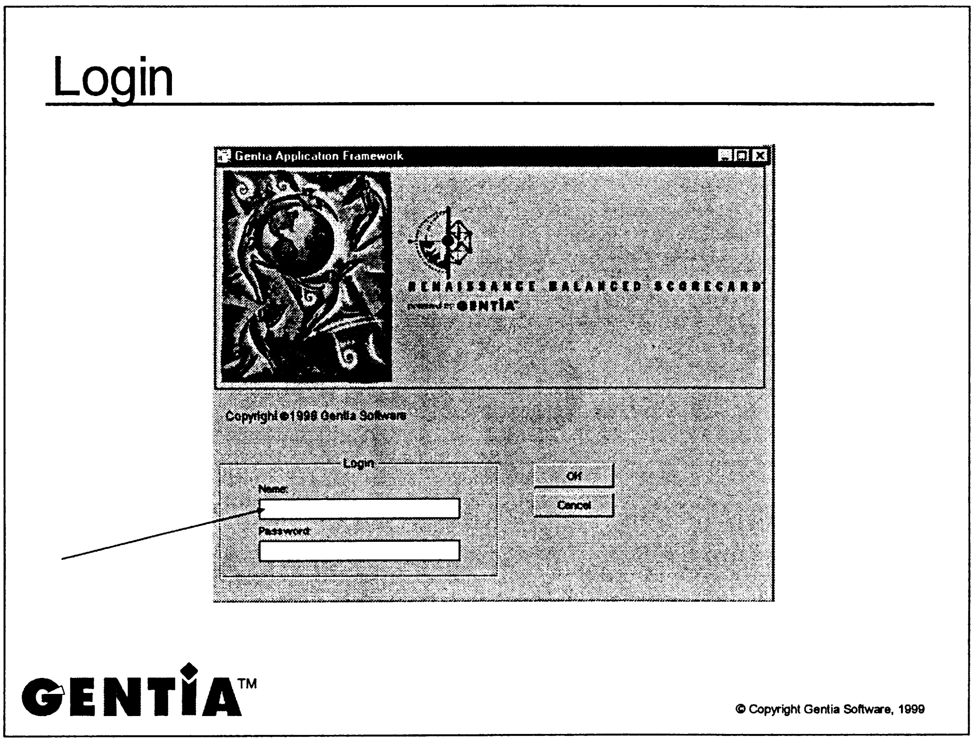


Overview

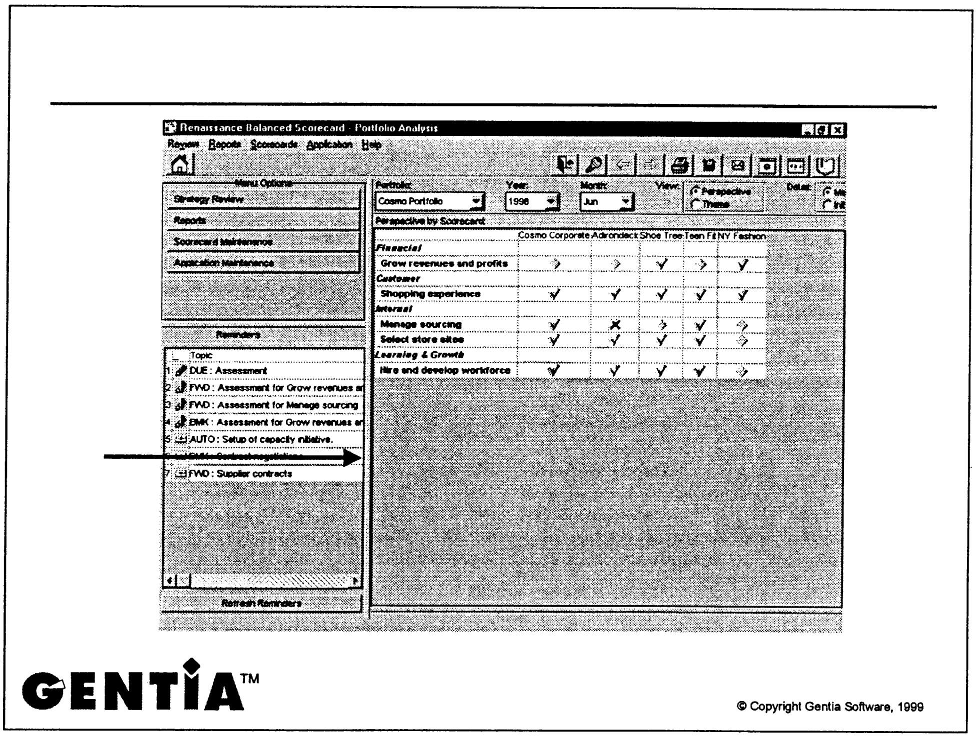
Cosmopolitan Clothing is a fashion retailer with four business units.

In this demonstration we will focus on how Cosmopolitan Clothing uses the RBSC application to manage its business.

We will be looking through the perspective of Jackie Brown, an executive at Cosmopolitan Corporate.

Step 1

Type in the name "Jackie Brown" (no password necessary).

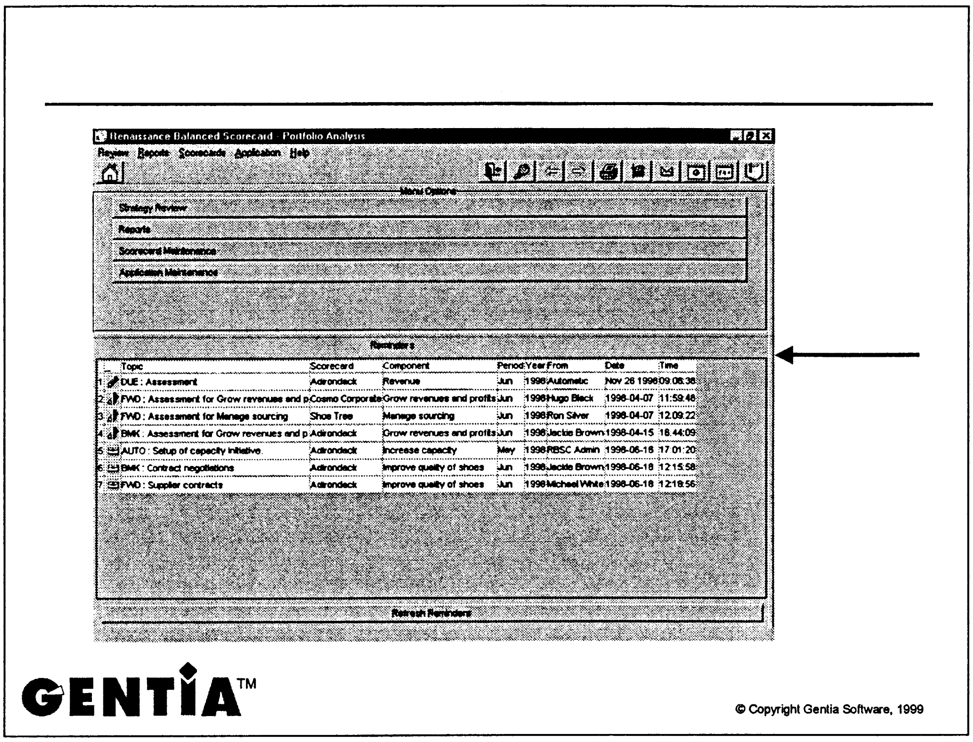


Overview

This is Jackie's "home page". It provides her with an overall view of performance (common objectives, grouped by perspective) for Cosmo Corporate and each individual business unit. The company is doing better in some areas than others. She notices that Cosmo Corporate's major objective, Grow revenues and profits, only had an average assessment this month and that Adirondack's performance has not been entirely satisfactory. Jackie quickly checks her reminders to see if there is anything urgent for her to deal with.

Step 2

Drag the split view divider to the right to reveal the whole of the reminders area.

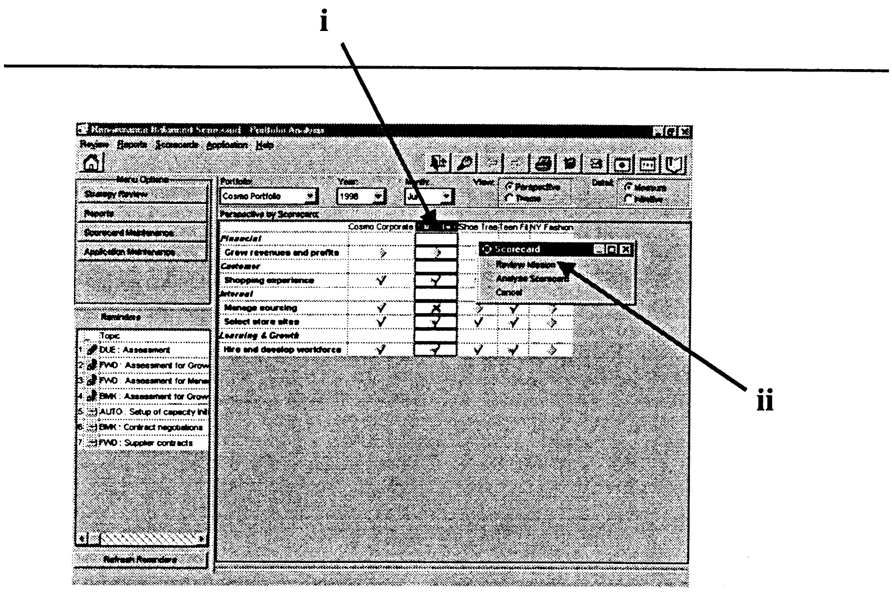


Overview

This is Jackie's list of reminders. It contains details of any overdue assessments that she should complete, comments or assessments that have been forwarded by other users and her own personal reminders. Her Revenue assessment for Adirondack is overdue and Hugo Black has forwarded the Cosmo Corporate assessment for Grow revenues and profits. She ought to see how she could help improve this by improving the performance of her own business unit.

Step 3

Drag the split view divider back to reveal the portfolio analysis again.



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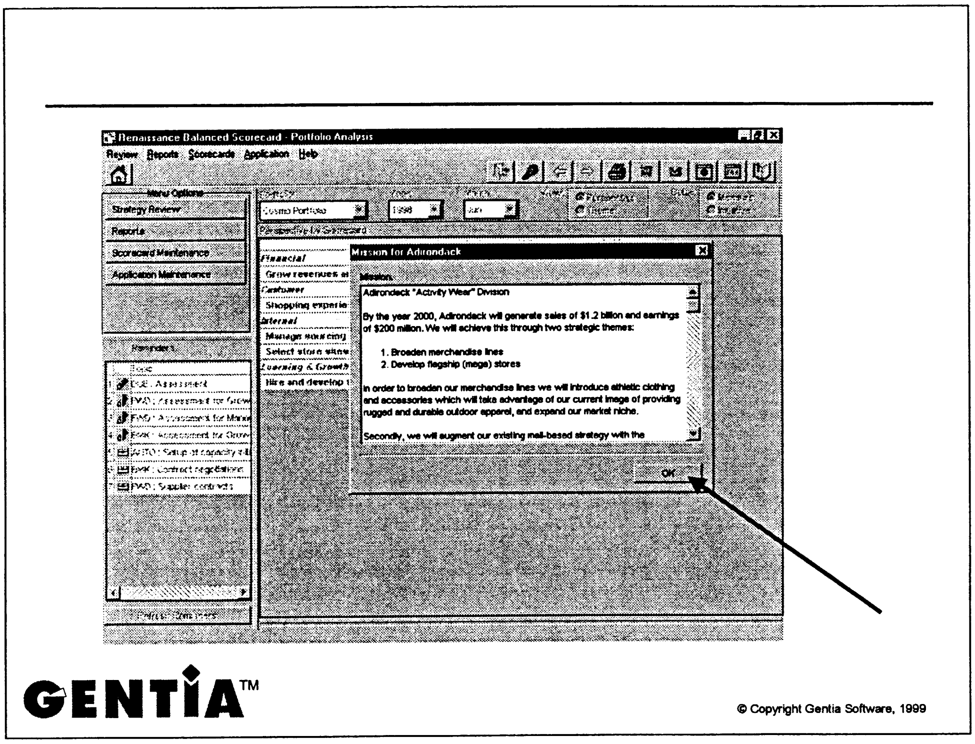
Overview

Each business unit has recorded its mission statement within the RBSC application, including details of how these strategic visions will be achieved. Jackie and her team have done this for Adirondack.

Step 4

i) Click on the Adirondack column heading.

ii) Select Review Mission from the pop-up menu.



Overview

Adirondack's mission statement describes its strategic vision and the way in which it plans to achieve this vision, by implementing two specific themes.

Optionally, you could also look at the Cosmo Corporate mission statement to show how Adirondack's strategy is aligned with the corporate vision.

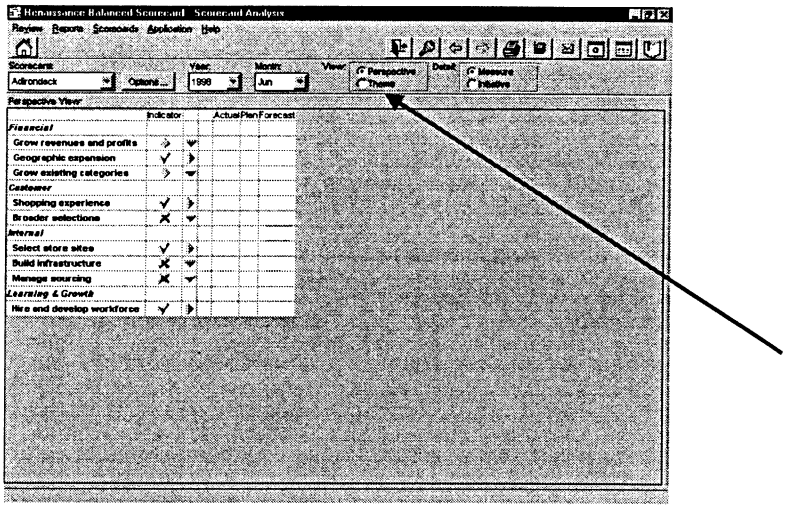
Jackie will now go to the Scorecard Analysis page to investigate Adirondack's performance.

Step 5

i) Click on OK to close the mission statement.

ii) Click on the Adirondack column heading again.

iii) Select Analyze Scorecard from the pop-up menu.



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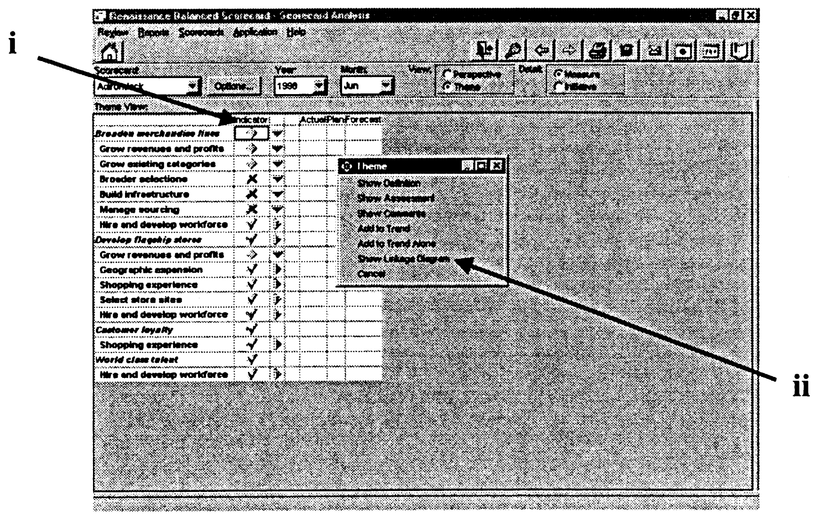
Overview

The objectives on the screen are currently grouped by perspective. Jackie is more interested in analyzing her business unit's performance in terms of the two themes that are supposed to be the key to achieving the strategy

Step 6

Click on the Theme button.



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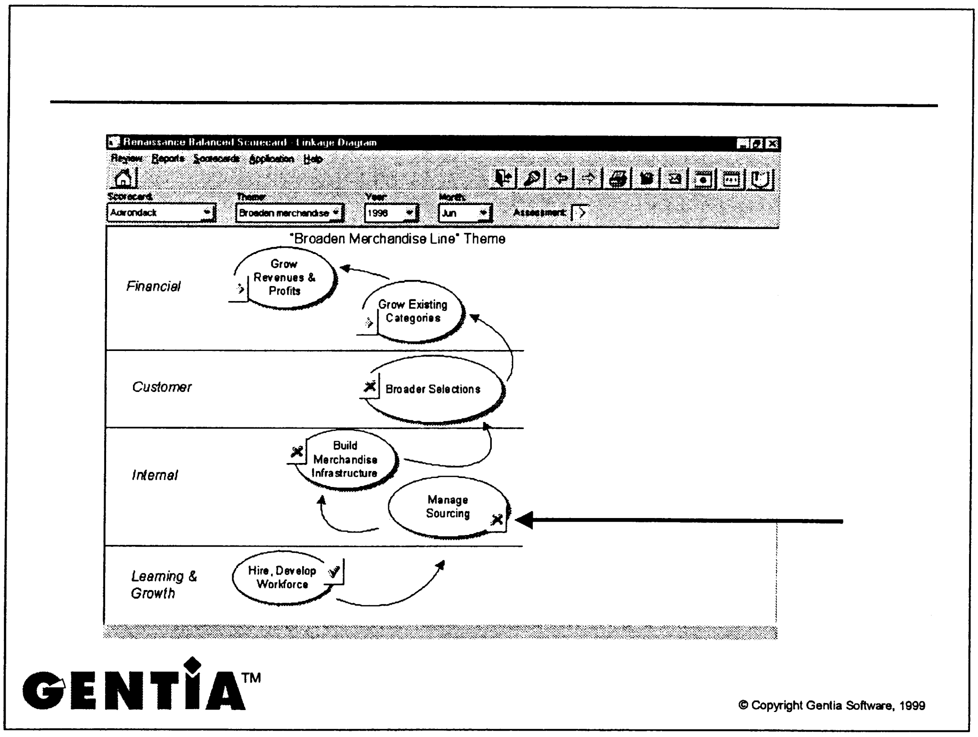
Overview

Jackie can now see quite clearly that all of Adirondack's themes are progressing well apart from one of the most important themes, Broaden Merchandise Lines. She can use a Linkage Diagram to view the objectives in this theme in terms of their cause and effect. The diagram will show how the objectives are intended to interact in order to achieve the strategy.

Step 7

i) Click on the assessment indicator for Broaden Merchandise Lines.

ii) Click on Show Linkage Diagram.



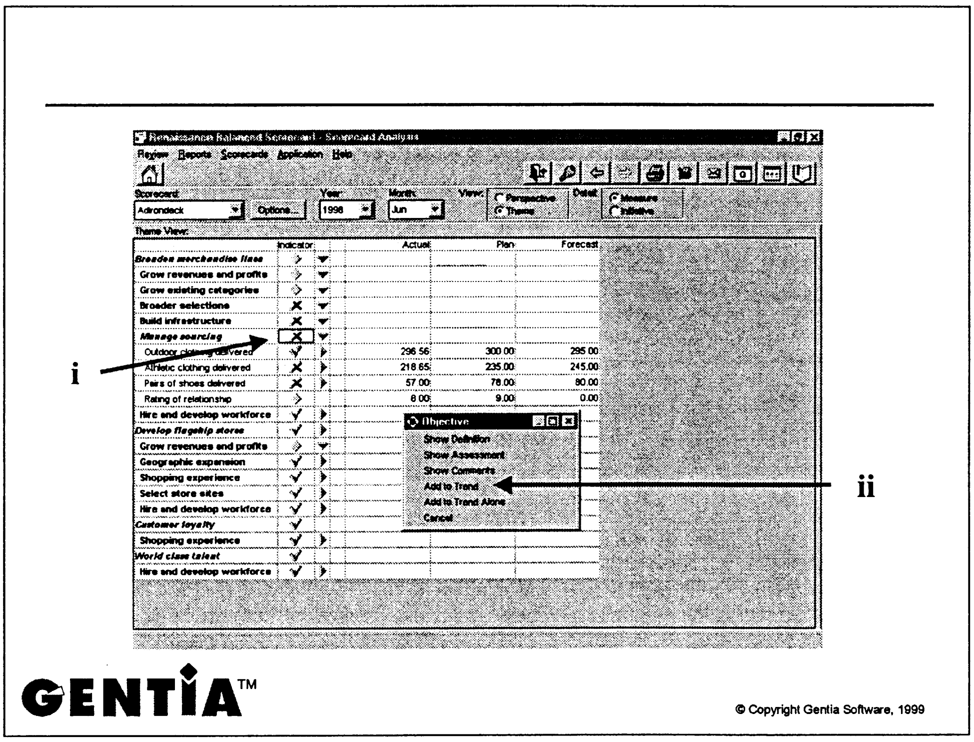
Overview

Manage Sourcing is a lead indicator to financial performance: unless stock and supply are handled well, the merchandise infrastructure will not enable Adirondack to offer a broader selection to customers (athletic attire as well as outdoor clothing) and this will restrict growth in the chosen categories, ultimately having an adverse effect on revenue and profit.

Jackie is very concerned that Manage Sourcing has a poor assessment and will analyze this objective in more detail to see if this is likely to be an on-going problem area.

Step 8

Click on the assessment indicator for Manage Sourcing.



Overview

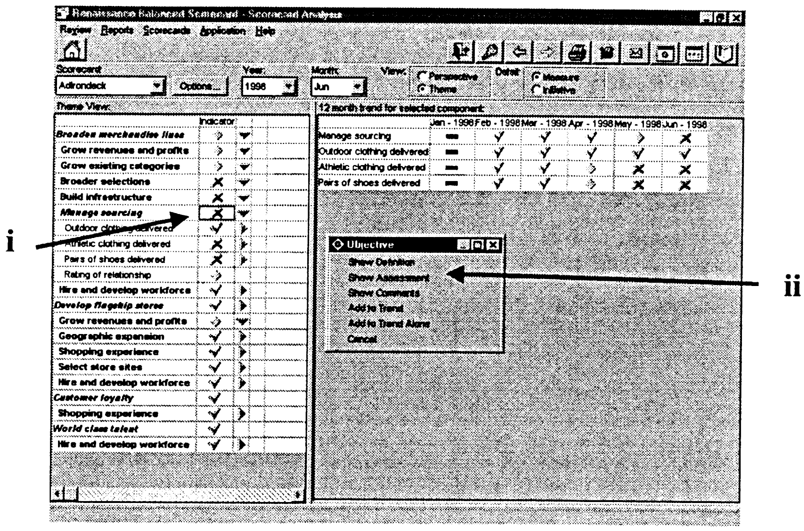
When Jackie returns to the scorecard analysis page, Manage Sourcing has been automatically expanded to display the quantitative measures for this objective. She decides that it would be useful to examine the trends for this objective and its measures.

Step 9

i) Click on the assessment indicator for Manage Sourcing.

ii) Click on Add to Trend.

iii) Repeat for Outdoor clothing delivered, Athletic clothing delivered and Pairs of shoes delivered.



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Overview

The trend analysis shows that the supply problems started in April and that they do not relate at all to outdoor clothing, only to shoes and athletic clothing. Jackie can obtain even more information by viewing the textual annotation that accompanies an assessment.

Step 10

i) Click on the assessment indicator for Manage Sourcing.

ii) Select Show Assessment from the pop-up menu.

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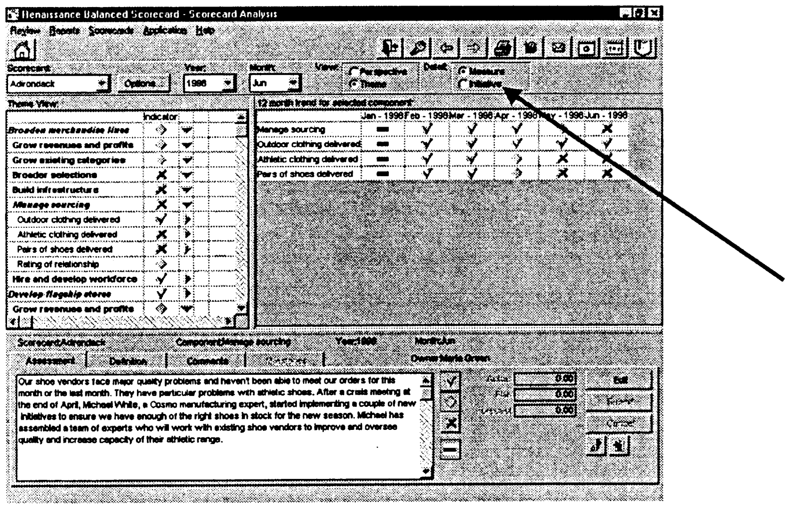

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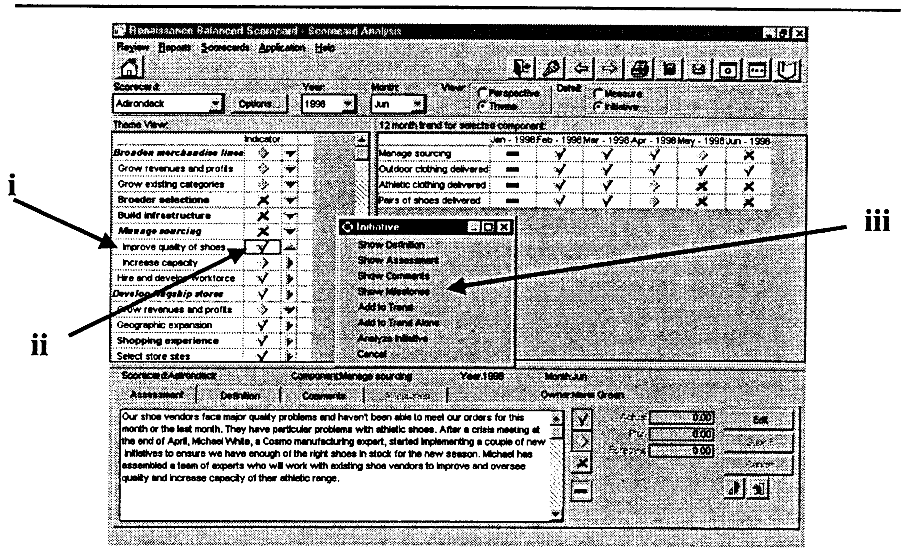
Overview

The written assessment confirms what Jackie had suspected from the trend analysis. The heart of the problem lies with athletic shoe supplies. Quality issues have limited the amount of stock delivered. Jackie also sees that initiatives are in place to deal with the situation. She needs to review the progress of these initiatives so she will switch the detailed objectives analysis on this page from measures to initiatives.

Step 11

Click on the Initiatives button.



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Overview

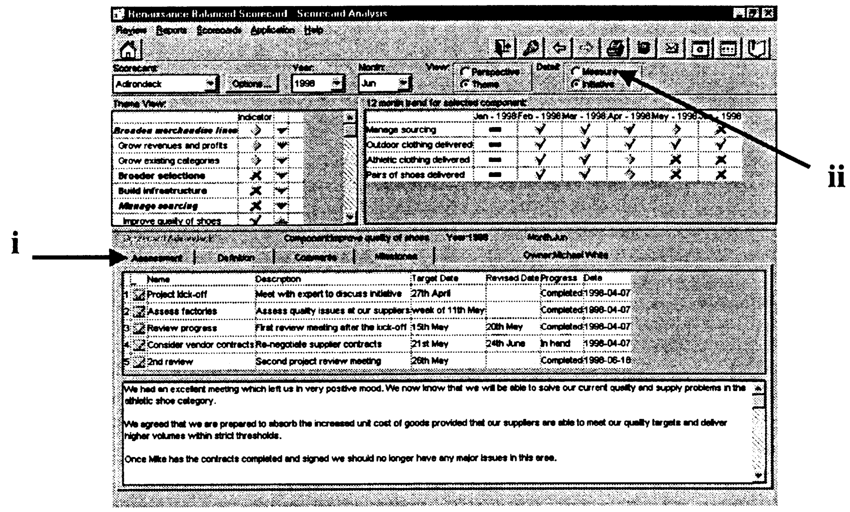
Jackie drills down on Manage Sourcing to view the two initiatives that are in place to support this objective. She is particularly interested in the quality initiative because this seems to be the key to solving Adirondack's current problems. She wants to examine this initiative's milestones.

Step 12

i) Drill down on Manage Sourcing.

ii) Click on the assessment indicator for Improve quality of shoes.

iii) Select Show Milestones from the pop-up menu.



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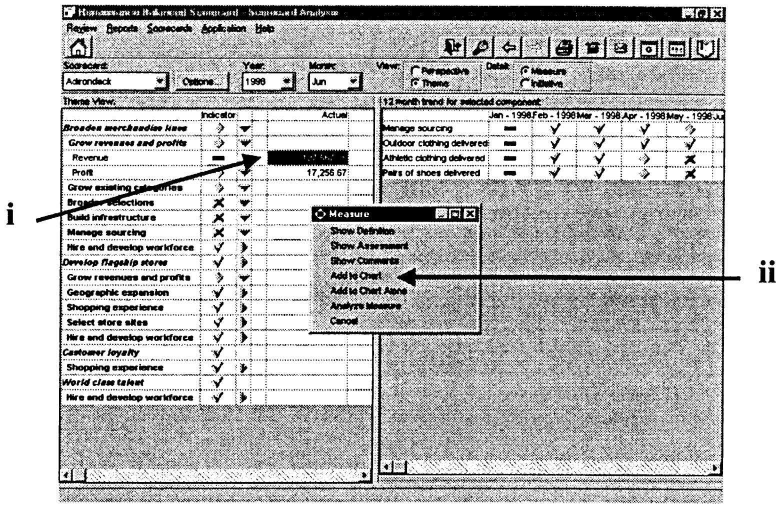
Overview

Jackie clicks on each milestone in turn, reading the description for each one. When she reaches the last one she is relieved to see that everything seems to be under control. She now feels that she is in a position to complete her outstanding assessment for Adirondack's Revenue measure.

Step 13

i) Optionally, also look at the definition, assessment and comments for this initiative.

ii) Click on the Measure button and then drill down on Grow revenues and profits.



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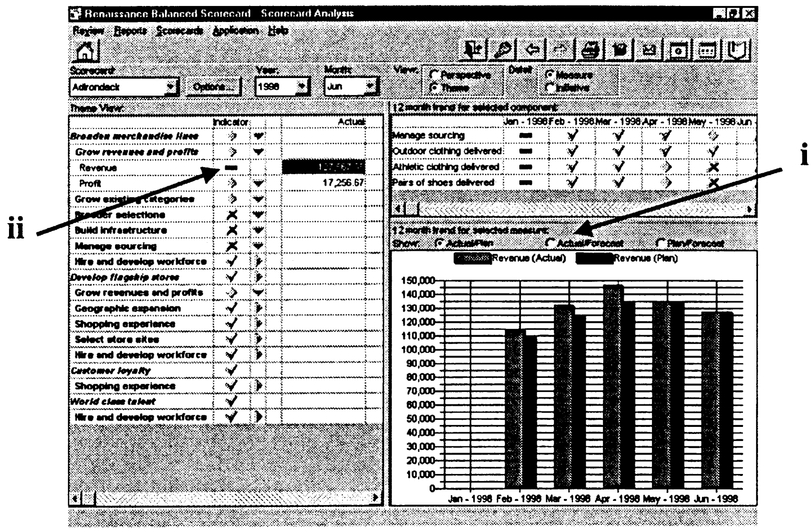
Overview

Before completing the Revenue assessment, Jackie decides to use a chart to examine the trend for the values associated with this measure.

Step 14

i) Click on the actual value for Revenue.

ii) Select Add to Chart from the pop-up menu.



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Overview

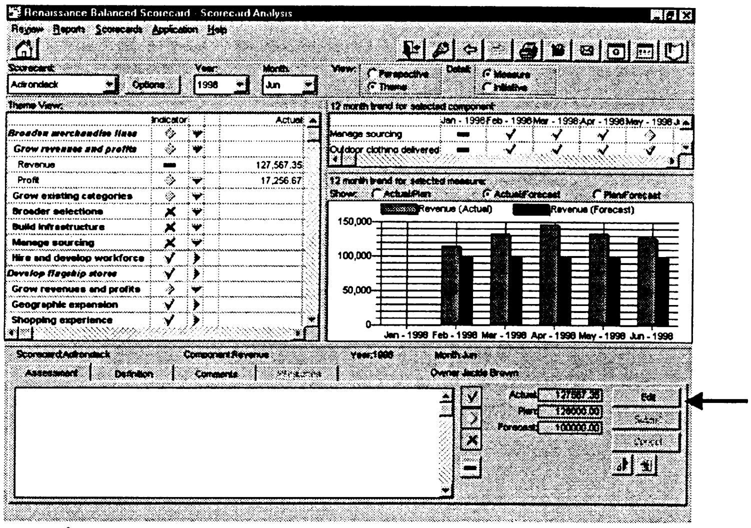
Jackie can switch between Actual / Plan and Actual / Forecast. The chart shows that over the last five months, Revenue has consistently exceeded forecast. However, this month, Revenue is slightly below plan. Jackie is satisfied that she understands the reason for this and that it won't continue to be a problem. She is ready to complete the Revenue assessment.

Step 15

i) Click on the Actual/Forecast button.

ii) Then click on the assessment indicator for Revenue.

iii) Select Show Assessment from the pop-up menu.



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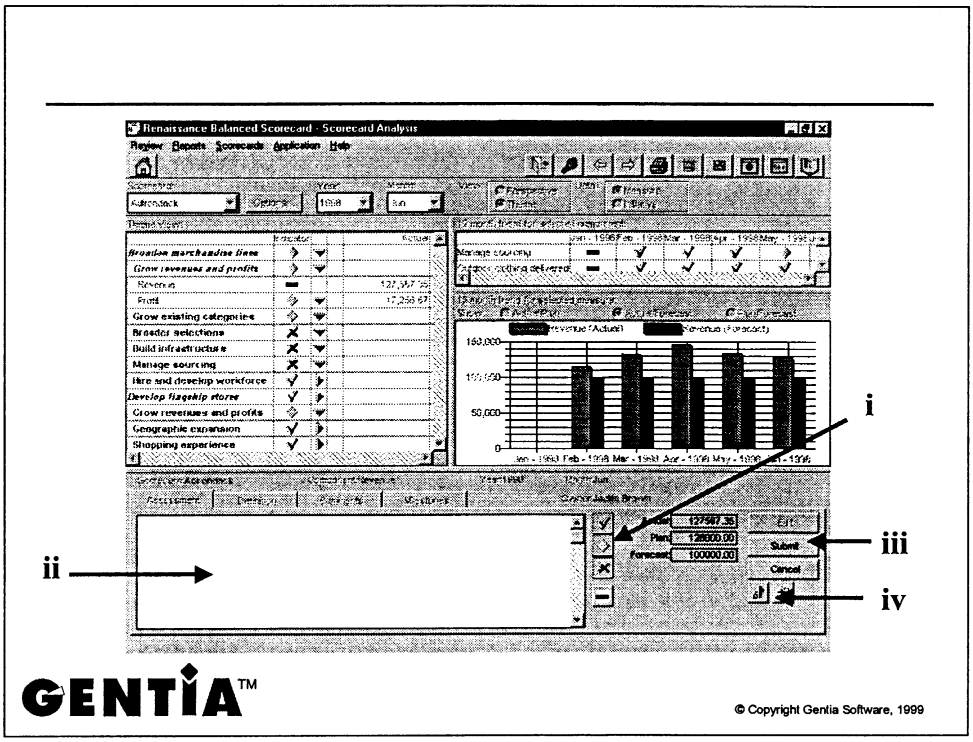
Overview

Jackie is now viewing the assessment details for Revenue. The narrative area is empty but the three values for this measure are displayed.

Step 16

Click on the Edit button.



Overview

Jackie completes the Revenue assessment. She hopes that the situation is under control so she will set the indicator to acceptable. Her last action will be to provide feedback to some of the other executives.

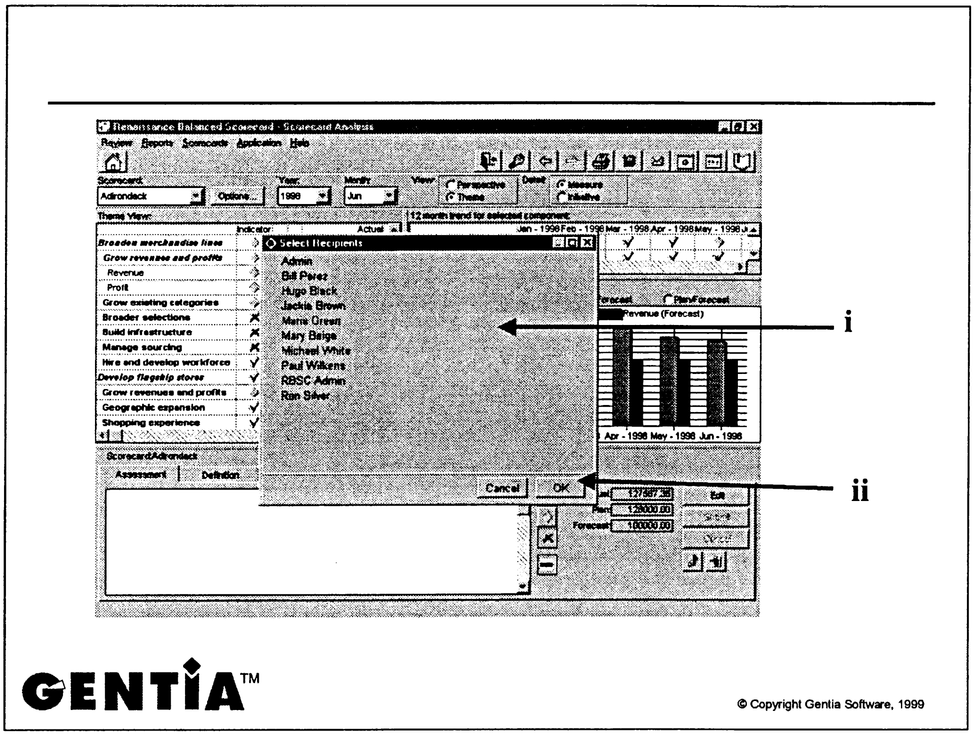
Step 17

i) Click on the Acceptable button (yellow diamond).

ii) Type the explanation into the text area.

iii) Click on Submit.

iv) Click on the Forward button.



Overview

Jackie forwards her completed Revenue assessment to three of her colleagues so that they will be fully up to date. The forwarded assessment will be included in their reminders list when they next log in to the application.

Step 18

i) Select Hugo Black, Maria Green and Michael White from the list of users.

iii) Click on OK.

Optionally, log in as Hugo Black, click on Jackie's reminder and select View Details from the pop-up menu.

2. RBSC on the Web

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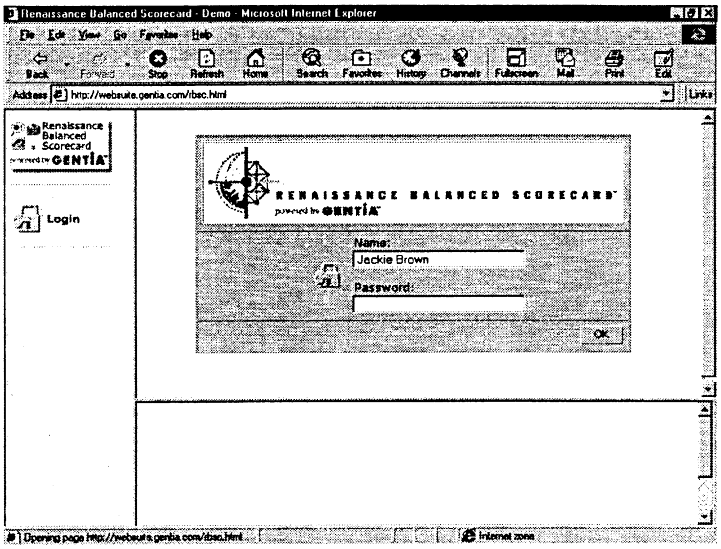
Login



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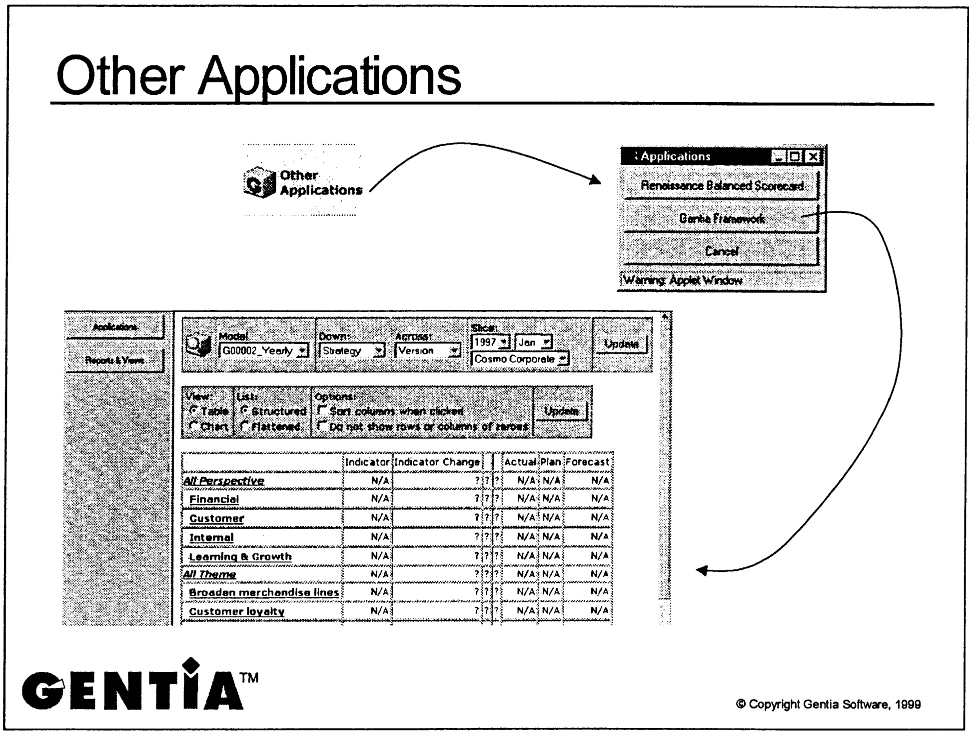
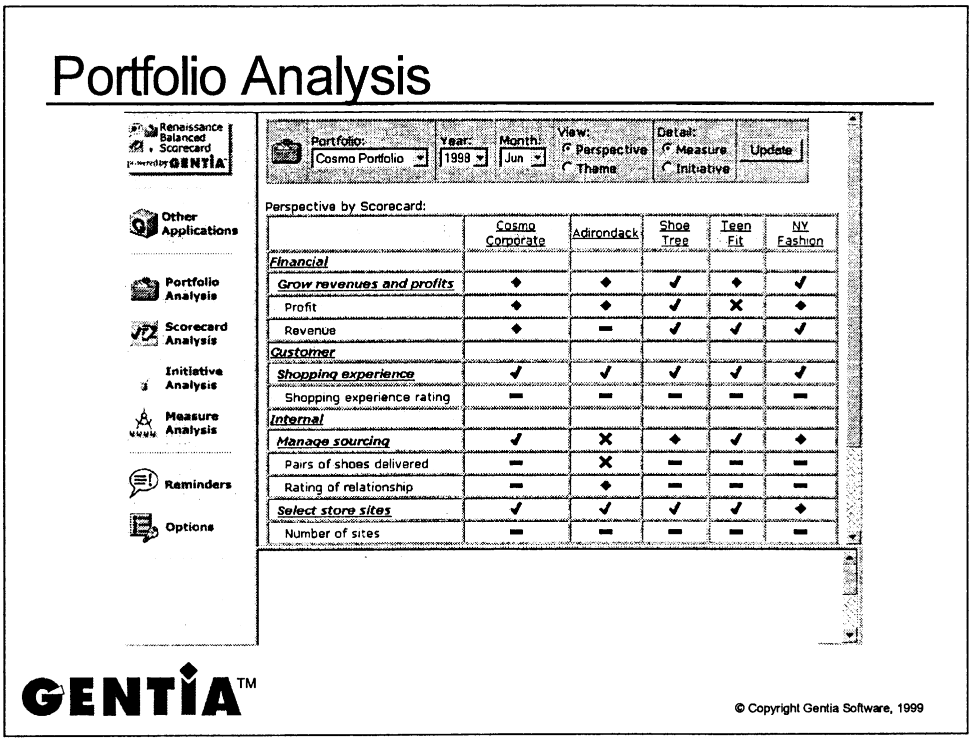
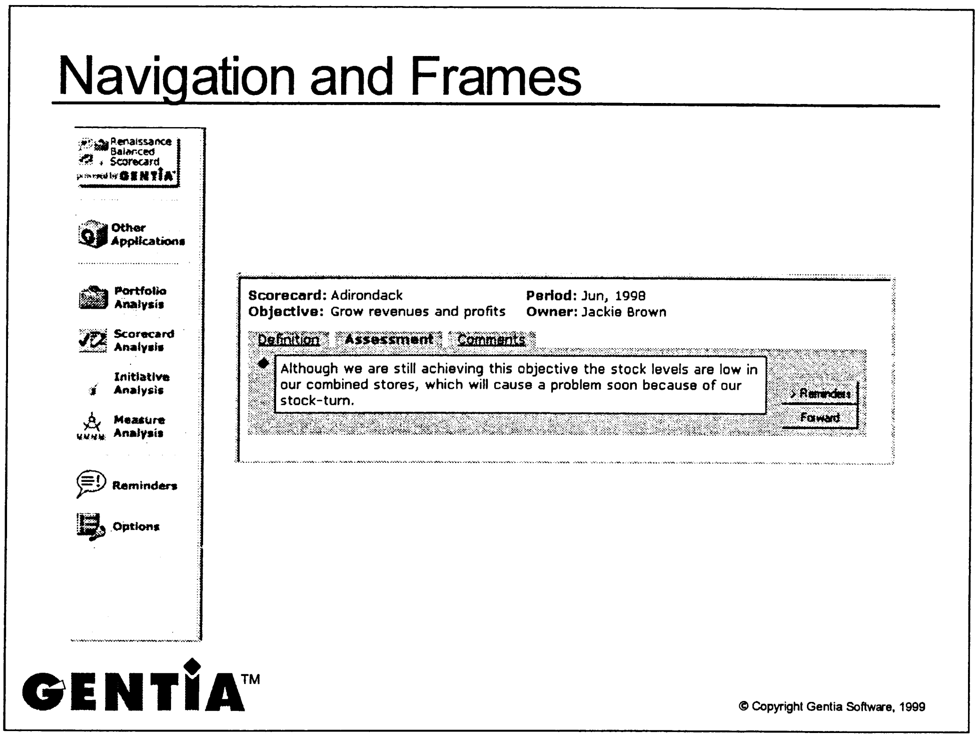


The ***Update*** button allows the user to make a number of selections from the top area of the screen and submit them all at the same time. This reduces the number of times the screen needs to access the server and refresh itself.



	Cosmo Corporate	Adirondack	Shoe Tree	Teen Fit	NY Fashion
Financial					
Grow revenues and profits	◆	◆	✓	◆	✓
Profit	◆	◆	✓	✗	◆
Revenue	◆	—	✓	✓	✓
Customer					
Shopping experience	✓	✓	✓	✓	✓
Shopping experience rating	—	—	—	—	—
Internal					
Manage sourcing	✓	✗	◆	✓	◆
Pairs of shoes delivered	—	✗	—	—	—
Rating of relationship	—	◆	—	—	—
Select store sites	✓	✓	✓	✓	◆
Number of sites	—	—	—	—	—

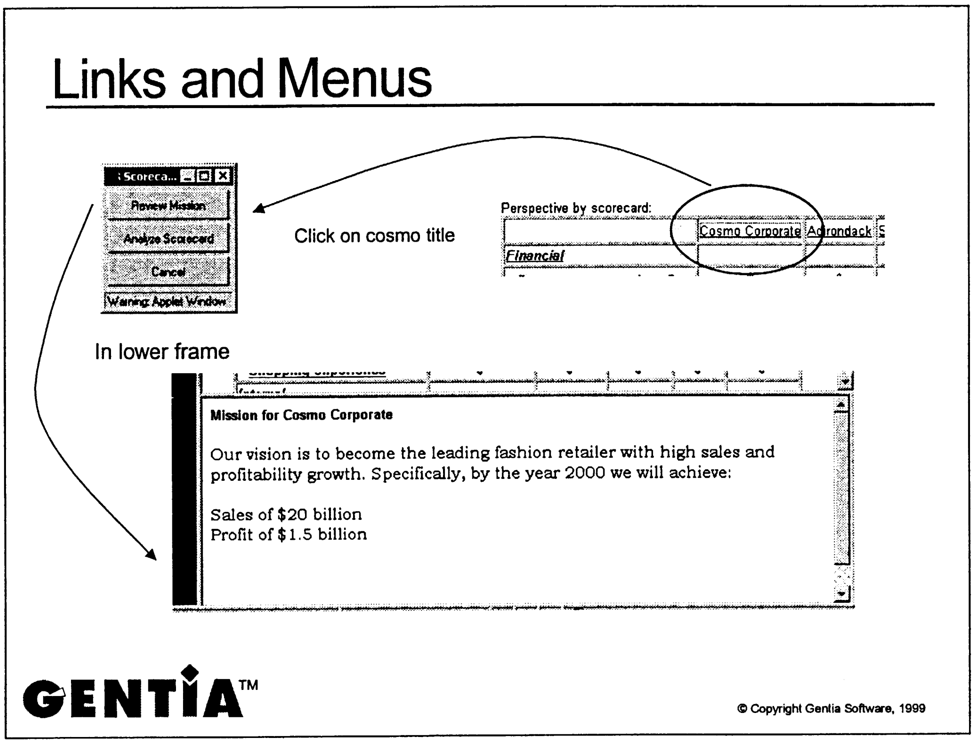
The ***Update*** button allows the user to make a number of selections from the top area of the screen and submit them all at the same time. This reduces the number of times the screen needs to access the server and refresh itself.



The screen for the web version of the RBSC application is divided into three frames (or areas). The left hand frame is the menu or navigation frame and allows the user to select which type of analysis they want. It also allows them to access their *Reminders* list and their *Options* list.

The main screen (top) is the frame that is linked to the Gentia server. This will display the actual scorecard information. When the user selects information from this screen, it will often be displayed on the bottom frame.

The bottom frame is not linked directly to the Gentia server but can display information that has been taken from the server. Selecting options from this screen can update the main screen and (indirectly) the information on the server.


Links and Menus
Scoreca...
Review Mission
Analyze Scorecard
Cancel
Warning: Applet Window
Click on cosmo title
Perspective by scorecard:
Cosmo Corporate
Adirondack
Financial
In lower frame
Mission for Cosmo Corporate
Our vision is to become the leading fashion retailer with high sales and profitability growth. Specifically, by the year 2000 we will achieve:
Sales of $20 billion
Profit of $1.5 billion
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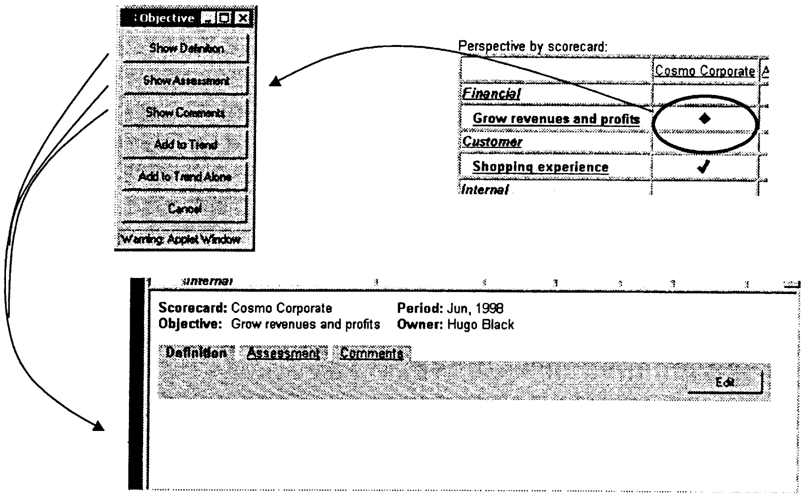
Objectives



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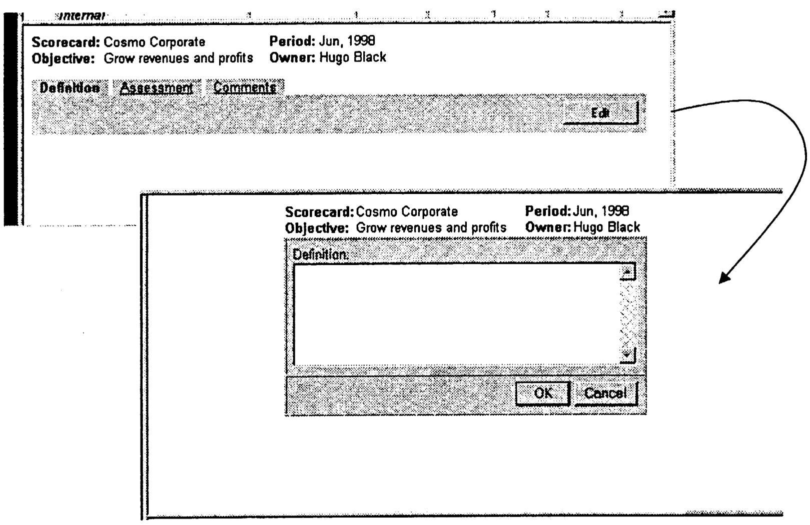
Definitions



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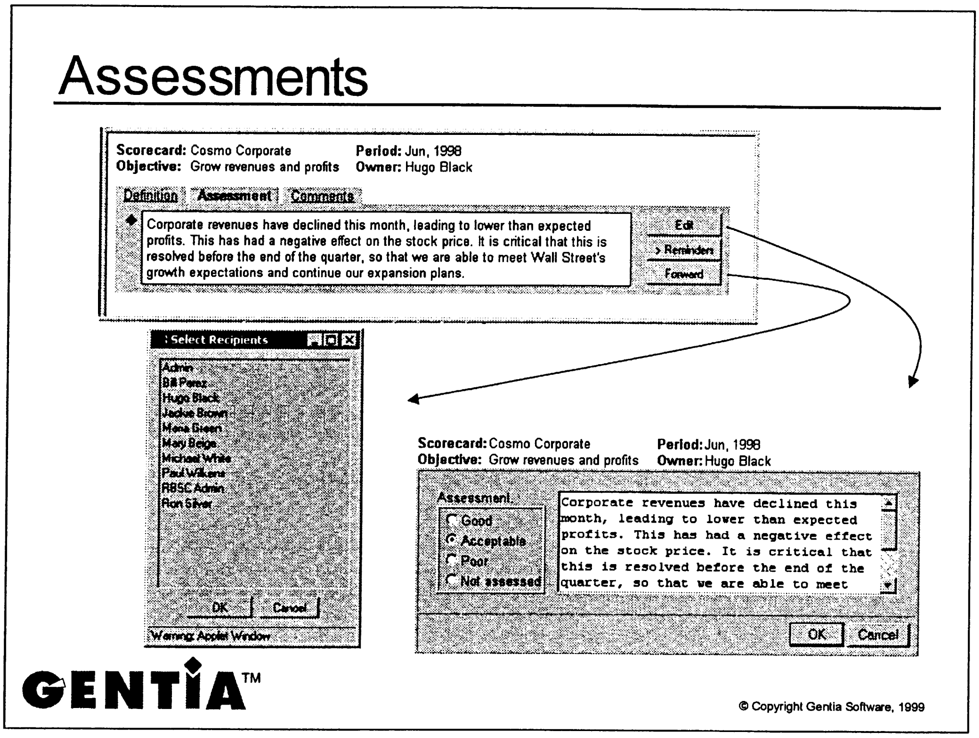
Assessments
Scorecard: Cosmo Corporate
Period: Jun, 1998
Objective: Grow revenues and profits
Owner: Hugo Black
Definition
Assessment
Comments
Corporate revenues have declined this month, leading to lower than expected profits. This has had a negative effect on the stock price. It is critical that this is resolved before the end of the quarter, so that we are able to meet Wall Street's growth expectations and continue our expansion plans.
Edit
> Reminders
Forward
Select Recipients
Admin
Bill Perez
Hugo Black
Jackie Brown
Mona Green
Mary Beige
Michael White
Paul Wilkens
RBSC Admin
Ron Silver
OK
Cancel
Warning: Applet Window
Scorecard: Cosmo Corporate
Period: Jun, 1998
Objective: Grow revenues and profits
Owner: Hugo Black
Assessment
Good
Acceptable
Poor
Not assessed
Corporate revenues have declined this month, leading to lower than expected profits. This has had a negative effect on the stock price. It is critical that this is resolved before the end of the quarter, so that we are able to meet
OK
Cancel
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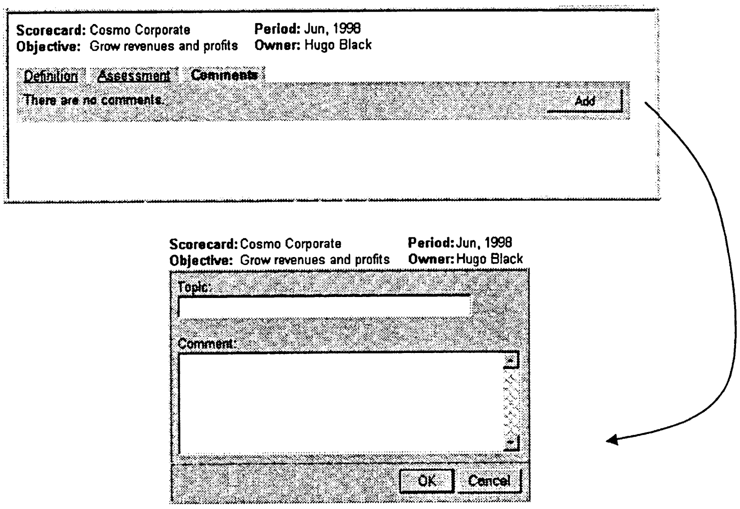
Comments



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Trend

	Cosmo Corporate	Adirondack	Shoe Tree	Teen Fit	NY Fashion
Financial					
Grow revenues and profits	◆	◆	✓	◆	✓
Customer					
Shopping experience	✓	✓	✓	✓	✓
Internal					
Manage sourcing	✓	✗	◆	✓	◆
Select store sites	✓	✓	✓	✓	◆
Learning & Growth					
Hire and develop workforce	✓	✓	✓	✓	◆

12 month trend for selected component / scorecard:

		Jan - 1998	Feb - 1998	Mar - 1998	Apr - 1998	May - 1998	Jun - 1998
Grow revenues and profits	Cosmo Corporate	▬	✓	◆	✓	✓	◆

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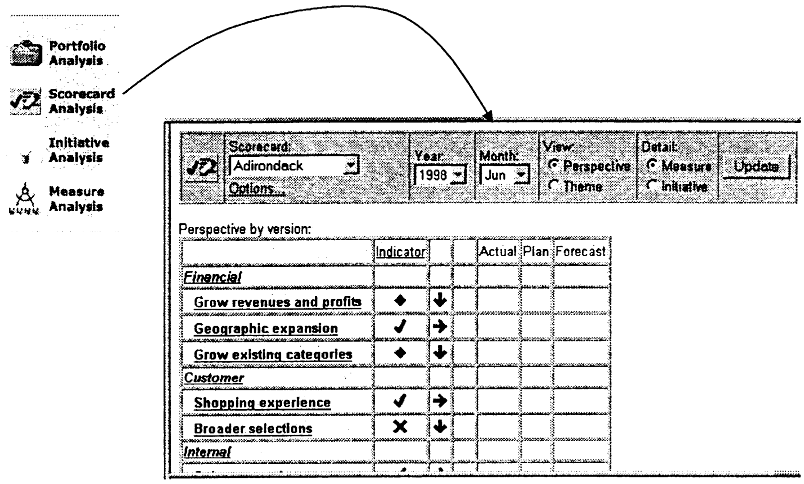
Scorecard Analysis



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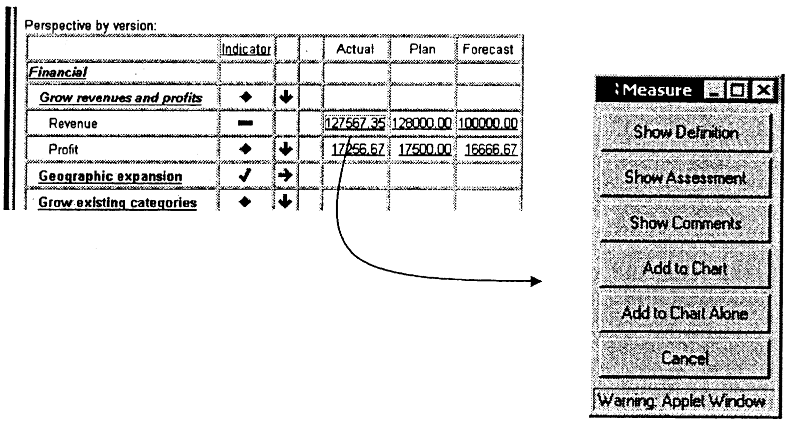
Data Entry



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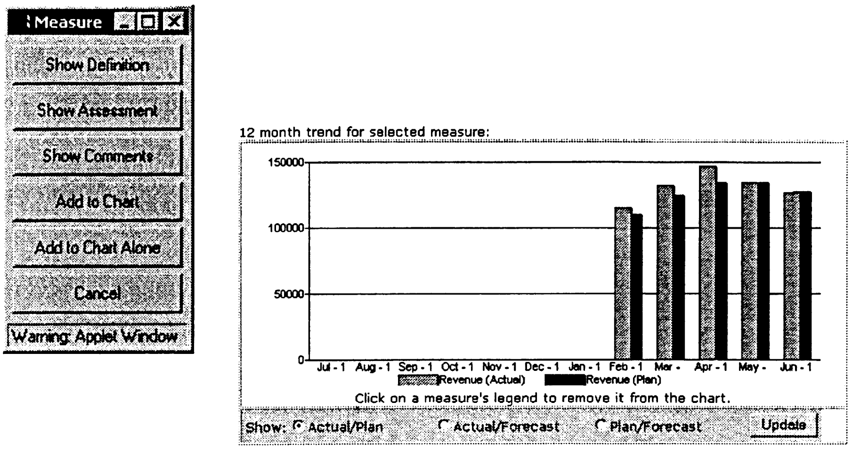
Charts



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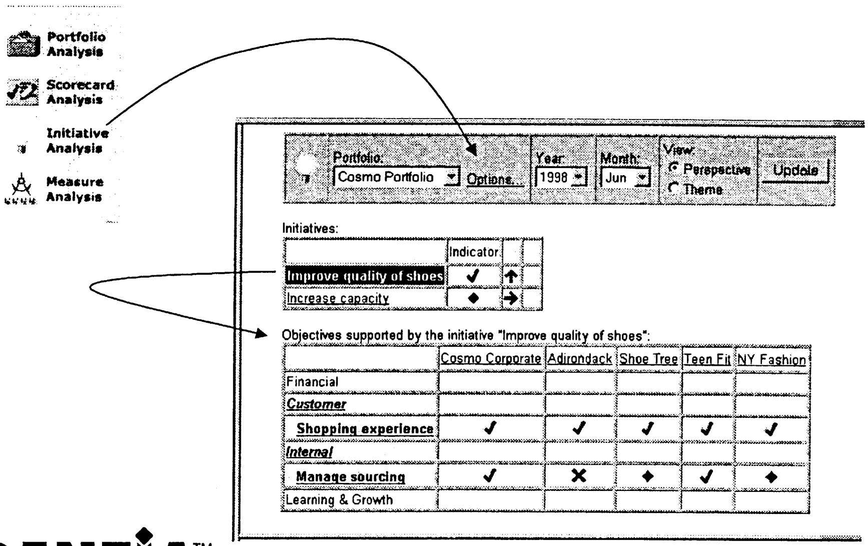
Initiative Analysis



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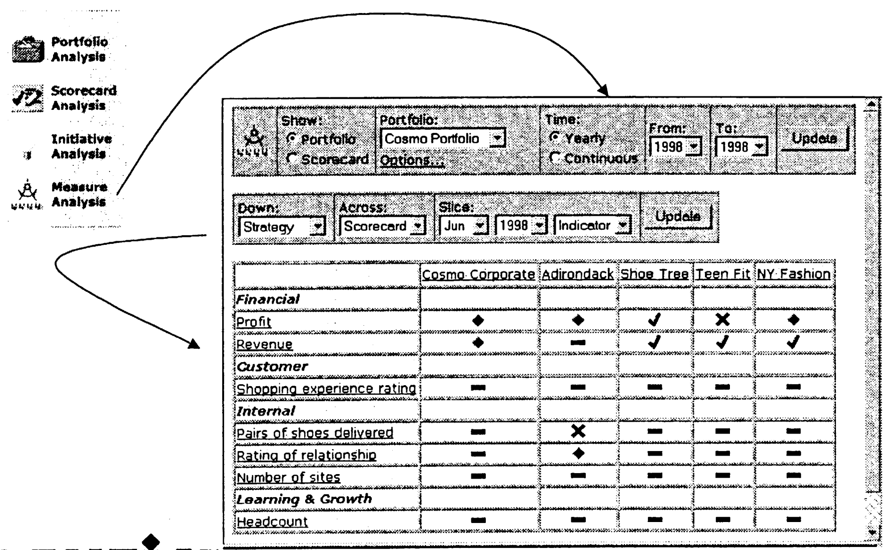
Measure Analysis



	Cosmo Corporate	Adirondack	Shoe Tree	Teen Fit	NY Fashion
Financial					
Profit	◆	◆	✓	✗	◆
Revenue	◆	–	✓	✓	✓
Customer					
Shopping experience rating	–	–	–	–	–
Internal					
Pairs of shoes delivered	–	✗	–	–	–
Rating of relationship	–	◆	–	–	–
Number of sites	–	–	–	–	–
Learning & Growth					
Headcount	–	–	–	–	–

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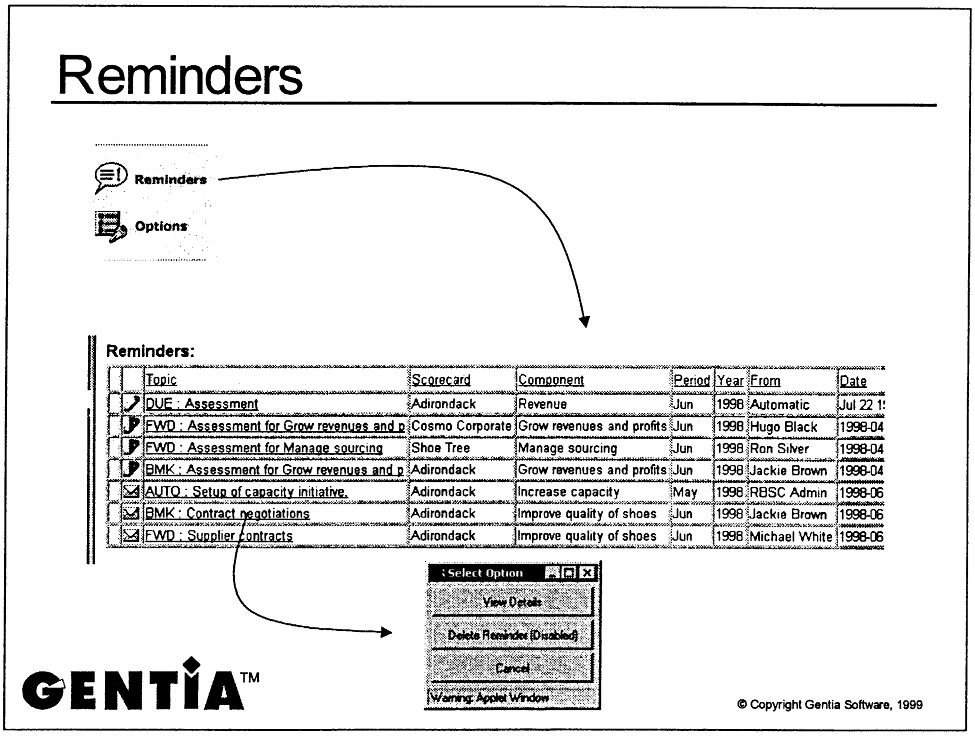
Reminders
Reminders
Options
Reminders:
Topic | Scorecard | Component | Period | Year | From | Date
DUE : Assessment | Adirondack | Revenue | Jun | 1998 | Automatic | Jul 22 1!
FWD : Assessment for Grow revenues and p | Cosmo Corporate | Grow revenues and profits | Jun | 1998 | Hugo Black | 1998-04
FWD : Assessment for Manage sourcing | Shoe Tree | Manage sourcing | Jun | 1998 | Ron Silver | 1998-04
BMK : Assessment for Grow revenues and p | Adirondack | Grow revenues and profits | Jun | 1998 | Jackie Brown | 1998-04
AUTO : Setup of capacity initiative. | Adirondack | Increase capacity | May | 1998 | RBSC Admin | 1998-06
BMK : Contract negotiations | Adirondack | Improve quality of shoes | Jun | 1998 | Jackie Brown | 1998-06
FWD : Supplier contracts | Adirondack | Improve quality of shoes | Jun | 1998 | Michael White | 1998-06
Select Option
View Details
Delete Reminder (Disabled)
Cancel
Warning: Applet Window
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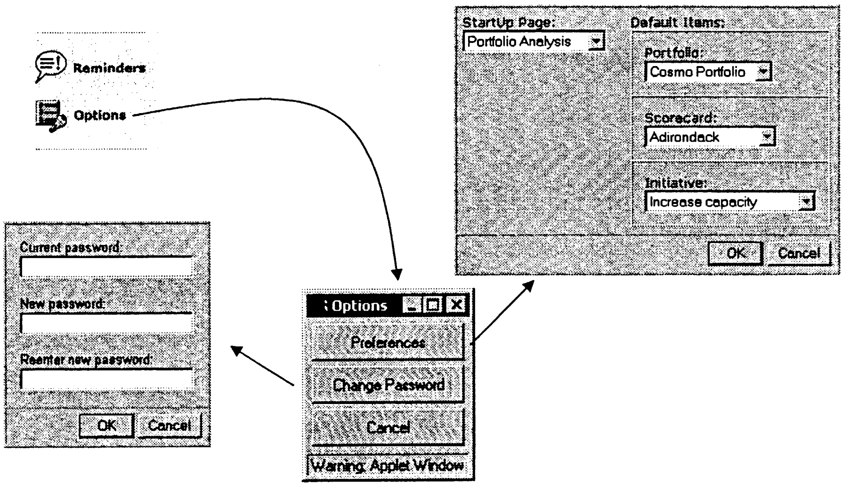
Options



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3. Building a Scorecard

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Building a Scorecard

- Overview of the wizards
- Getting started & creating users
- Enterprise management
  - associated wizards
- Scorecard wizard
- Portfolio wizard

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Overview of the Wizards

- To guide you through the tasks required to build (& modify) a balanced scorecard application
- A linked set of pages, each called a **step**
- Separate wizards for portfolio, scorecard and enterprise definition containing
  - perspective wizard
  - theme wizard
  - initiative wizard

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Before you start...

- Before you start building the RBSC application, ensure that the following activities have been performed:
  - **Design the balanced scorecard - conceptually**
  - **Draw the linkage diagram - electronically**
    - **N.B. colour palette**
  - **Identify the scorecard users**

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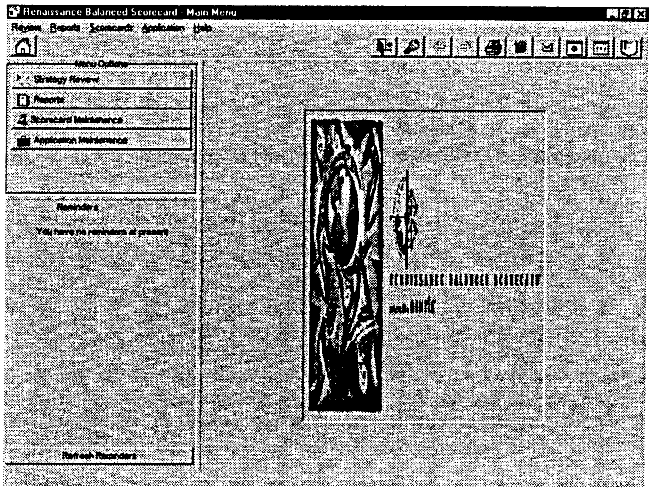
Before you start building the RBSC application, it is important that you have a detailed knowledge and understanding of the scorecard components (scorecards, objectives, initiatives, measures, themes, etc.) that your organisation requires in its application.

The thematic linkage diagram, or cause & effect diagram, should exist. You should use a drawing tool such as Paint Shop Pro to create the diagram. To avoid any colour palette conflicts when the linkage diagram is displayed, please observe the following:

> Use your drawing tool to load the colour palette provided with the RBSC application. This palette is a file called \rbsc\webpal.pal.
>
> You are advised to keep each diagram small enough to be fully displayed, without the need for scrolling, using 800 by 600 resolution.
>
> Save the diagram as a 16 colour Windows bitmap.

Getting Started

- Login as **RBSC Admin** = administrator status



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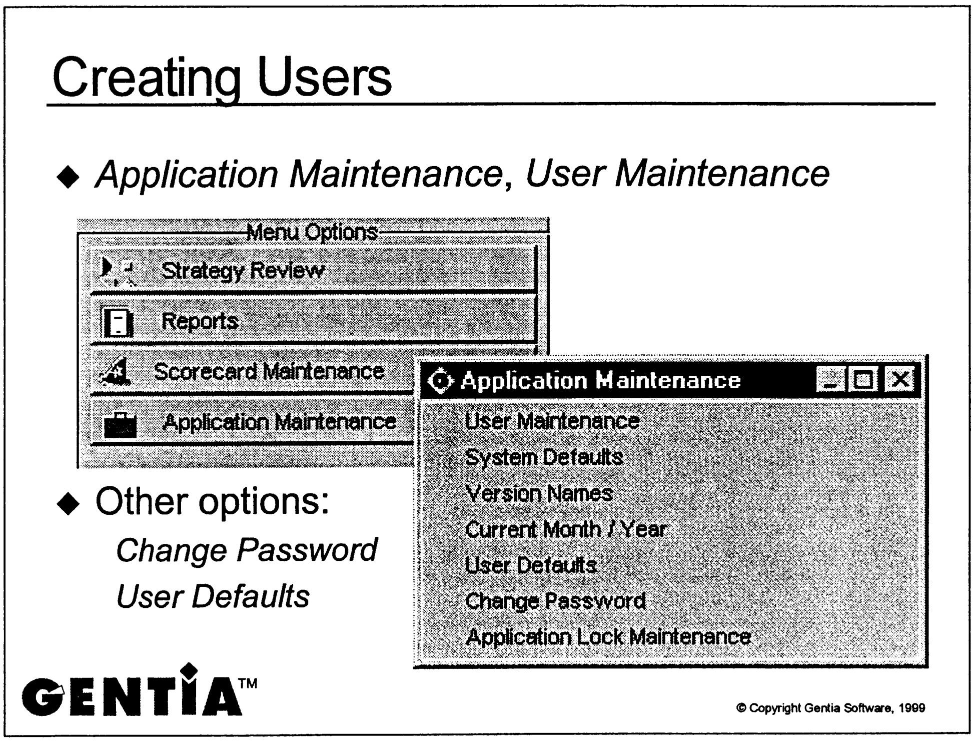
Start by logging in as **RBSC Admin**. There is no initial password. When using your application in a work environment, you are strongly advised to change the password.

Some pages within the scorecard application can only be accessed by a user with RBSC administrator status, since they are used to perform the administrative functions. These pages are accessed using the *Scorecard Maintenance* and *Application Maintenance* buttons on the menu. A user without RBSC administrator status would not be able to access all of the options from these buttons.

The **RBSC Admin** user is an RBSC administrator.

Additional users can be created with RBSC administrator status who will also be able to view the all the restricted maintenance options.



The first step is to set up your balanced scorecard users. This is done using the *User Maintenance* option, which is used to:

add new users

remove existing users

update the details of existing users

Other Useful Options:

The *Change Password* option can be accessed by any level of user and is used to specify a new password or to change an existing password. You will be required to enter your old password first, then your new password and then your new password again, for confirmation. Passwords must have at least 6 characters.

The *User Defaults* option can also be accessed by any user and is used to define a number of default settings:

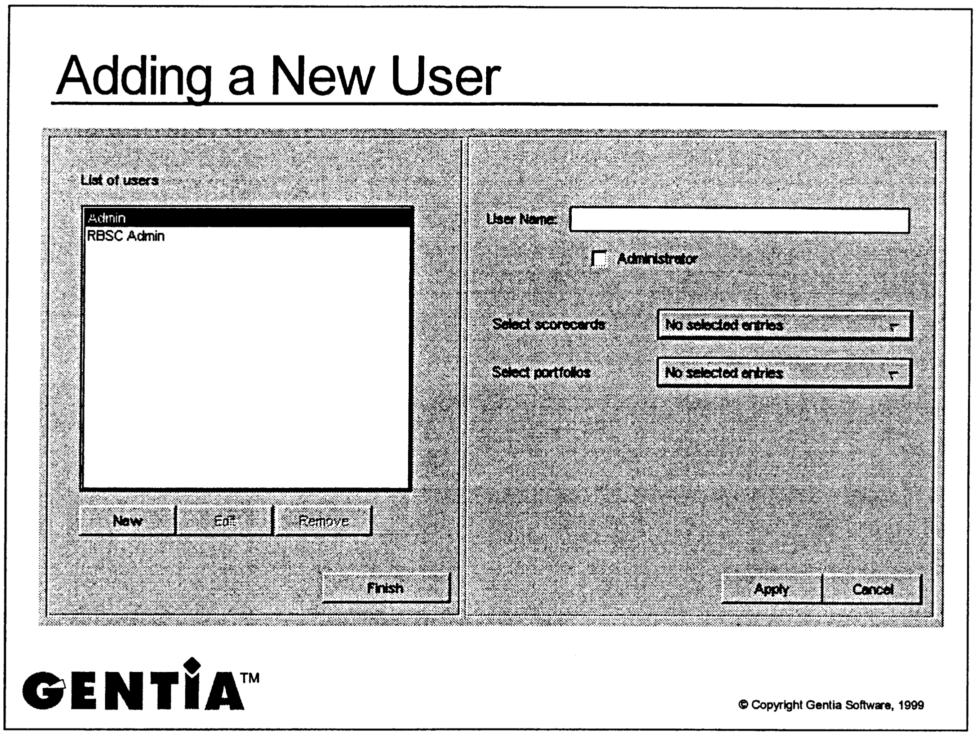
Default Portfolio - to define a default portfolio for the portfolio analysis page

Default Scorecard - to define a default scorecard for the scorecard analysis page

Default Initiative - to define a default initiative for the initiative analysis page

Default Client Page - to select which analysis page (portfolio, scorecard or initiative) is to form part of your home page.

Refresh Reminders - allows the user to determine when the reminders are updated.



To add a new user, select *Application Maintenance⇒User Maintenance*.

This page opens with the right-hand side disabled (i.e. 'greyed out'); only the left-hand side is enabled.

To add a new user:

Click on the *New* button (bottom, left), which will enable the right-hand area of the page.

Enter the *User Name* and if the user is to have RBSC administrator status, check the *Administrator* box.

Specify which scorecards and portfolios the user is to have access to. If none have been created, you can do this at a later stage. It is not necessary to give users access to scorecards and portfolios that they have created; they have automatic access to any that they create.

Click on *Apply* to save the settings. *Cancel* will 'unsave' the changes.

Finish will take you back to the home page.

The *Edit* and *Remove* buttons can be used to make changes to an existing user or to delete a user; select the user from the list before clicking on the appropriate buttons.

What is the ORDER ?

- *Enterprise Definition*
  - *Perspective wizard*
  - *Theme wizard*
  - *Initiative wizard*
- *Scorecard wizard*
- *Portfolio wizard*

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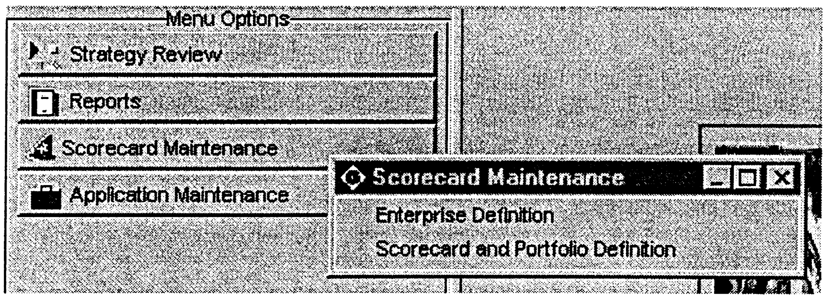
The order for creating a scorecard (and its associated components) is important. In this instance, we will be looking at the order as if we were creating everything from scratch. The Enterprise definition wizards (3 in all) contain central, re-useable components. These can be included in a scorecard (or left out) but have been defined already. In addition, they can be included and modified. They act as a type of template for the scorecard user.

The scorecard is usually created second because it uses some of the central enterprise components. It is far more individual in its appearance and will almost definitely contain components that are unique.

The portfolio is created last because it is made up of existing scorecards.

Using the Wizards

- *Scorecard Maintenance*
  - *Enterprise Definition*
  - *Scorecard and portfolio definition*



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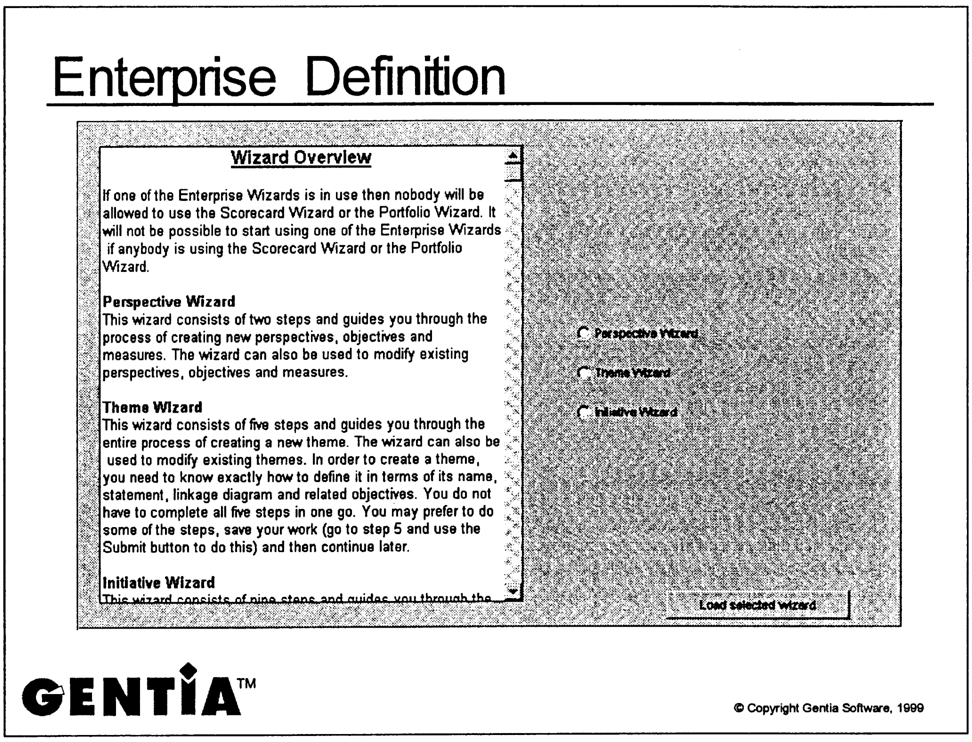
Having created the users in the application, the next step is to start using the wizards to build the scorecard.



There are three wizards contained within the *Enterprise Definition* category. They allow the RBSC administrator to create and maintain various components. These components are defined centrally, making no reference to a specific scorecard.

The first wizard is the *Perspective Wizard* and allows the administrator to define perspectives, objectives and measures.

The second wizard is the *Theme Wizard* and creates themes.

The third wizard is the *Initiative Wizard* and is used to create initiatives.

Although any user creating a scorecard or portfolio can use enterprise components, only the RBSC administrator can define and maintain them. Individual users will be able to add additional (non-enterprise) components into their individual scorecard or portfolio.

Name or definition changes made by the administrator to components will automatically affect any scorecard where that component is used. If a component is deleted, all assessments (or data if it is a measure) will be removed from a scorecard using it.

NB. If one of the Enterprise Wizards are being used, nobody will be allowed to access any other wizard. Similarly, if the Scorecard wizard or the Portfolio Wizard is being used, the Enterprise Wizards will not be accessible.

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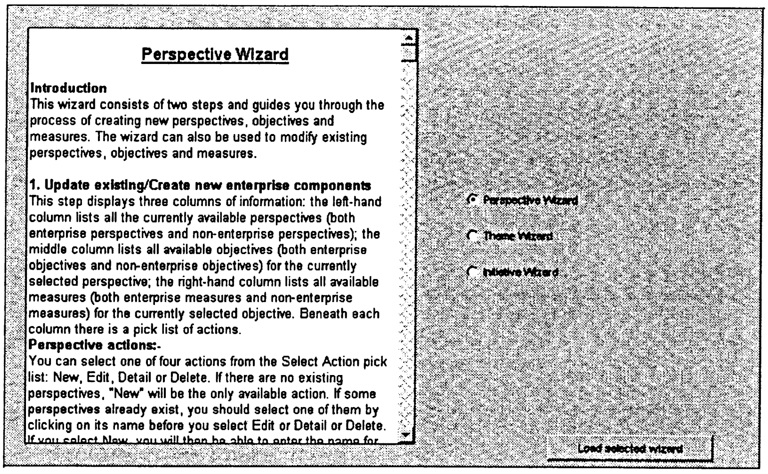
Perspective Wizard



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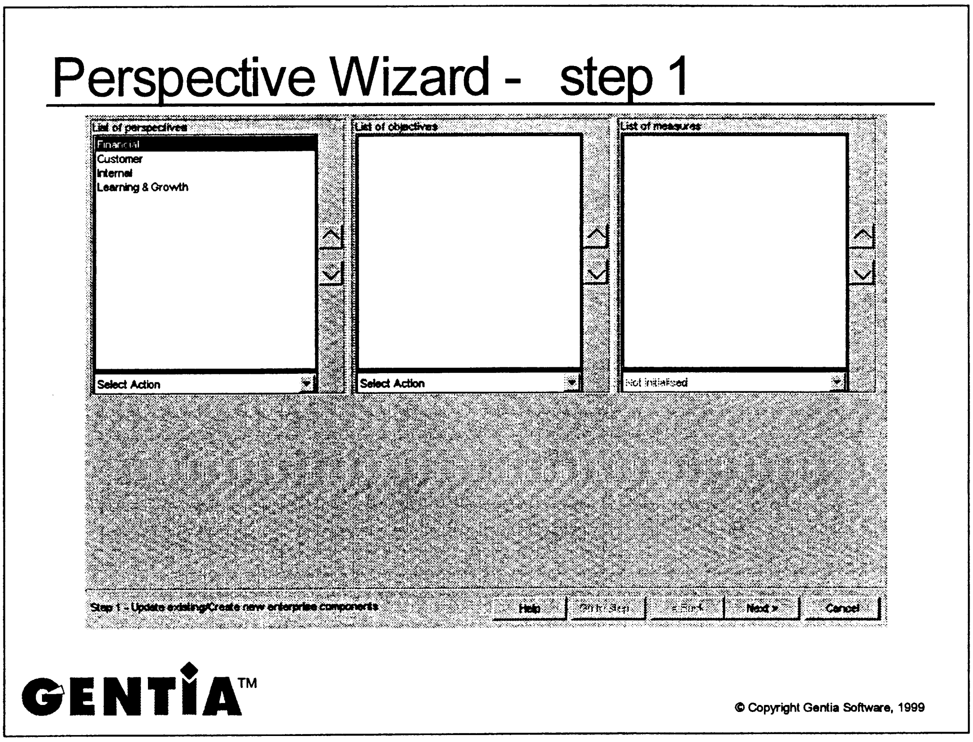
The *Perspective Wizard* comprises two steps.

The first step is to *Update existing/Create new enterprise components.*
The second step is the *Review enterprise components* step.



Step - 1

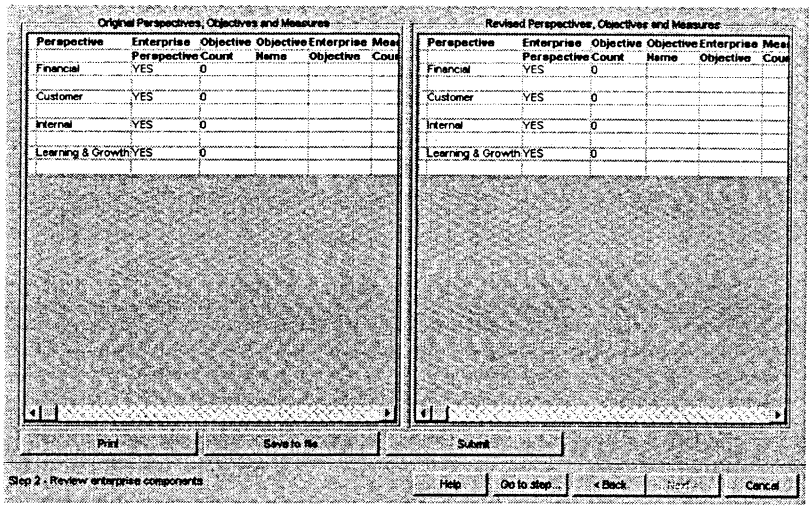
Displays three columns; the left column lists all the currently available **perspectives** (both enterprise and non-enterprise); the middle column shows all available **objectives** (both enterprise and non-enterprise) for the currently selected perspective and the right column shows all available **measures** (both enterprise and non-enterprise) for the currently selected objective. Below each column is a pick list.

The administrator can select: *New*, *Edit*, *Detail* or *Delete* from the perspectives list. If *New* is selected, an extra screen opens allowing the relevant details to be added. One option here is to check the *Enterprise Definition Box*. This ensures that the perspective is added to the Enterprise manager.

The administrator can select: *New, Edit, Detail, Delete* or *Cut* from the objectives list. Selecting *Cut* the link between the currently selected objective and its perspective will be removed. The options will be taken away and replaced by a *Paste* option. The objective can then be pasted into a new perspective.

Measures have the same option associated with them as objectives although they are linked to the selected objective, not the selected perspective. *Cut* allows the administrator to remove a measure from one objective and paste it into another objective.

Perspective Wizard - step 2



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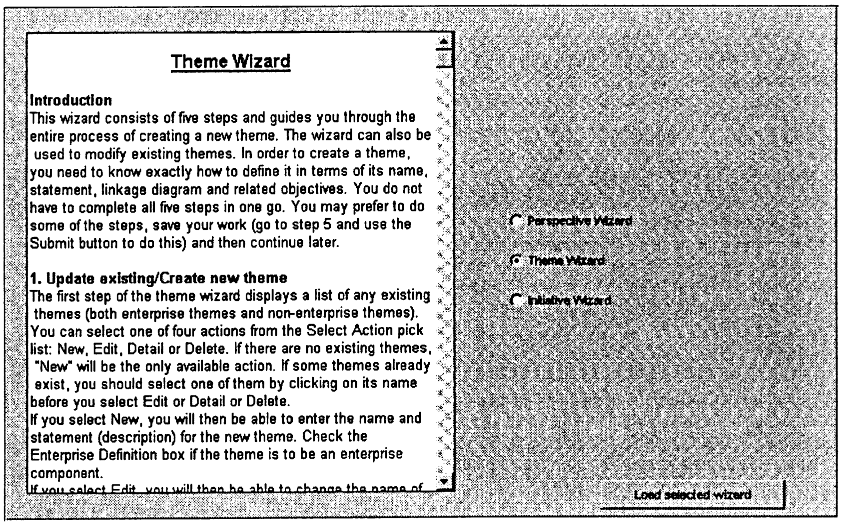
Step- 2

Allows the administrator to review all the RBSC components. The left column contains all original details (before editing began) and the right column shows all new and amended components. To change a component, return to the previous step. When completely satisfied, choose *Submit* and all changes will be update in the database.

Theme Wizard



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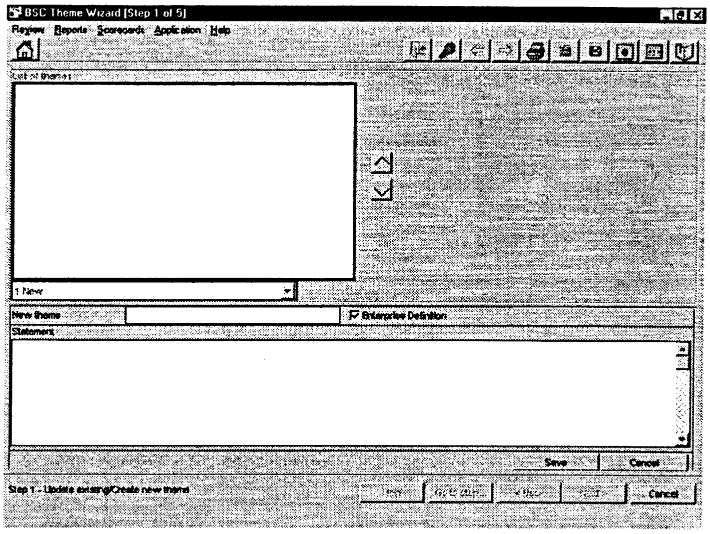
This wizard uses five steps and creates a new theme. In addition, it can also modify an existing theme. To create a theme the administrator must know the name, statement, related objectives and have a linkage diagram.

Theme Wizard - 1



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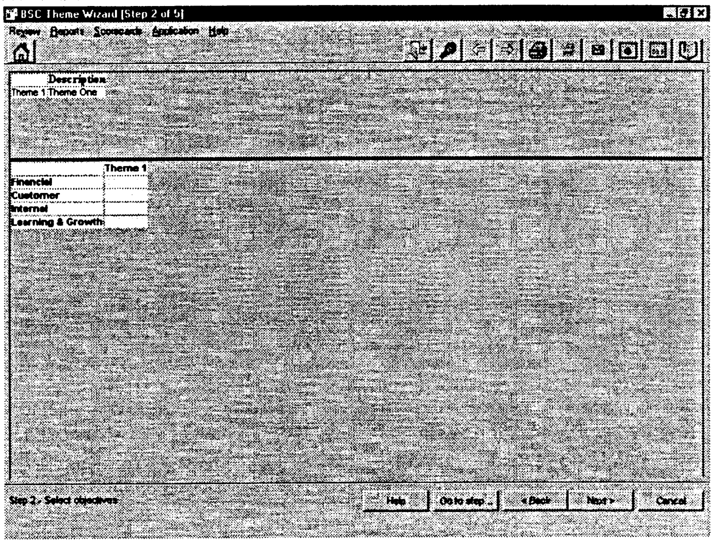
Step 1 - Updating existing/Create new theme

In this step, the user can either add a new theme, or select and edit an existing theme. Having created or modified the theme, it can become an enterprise component by checking the *Enterprise Definition Box*.

Selecting *Detail* will display a list of all objectives associated with the theme as well as any scorecards and portfolios that use the theme.

Theme Wizard - 2



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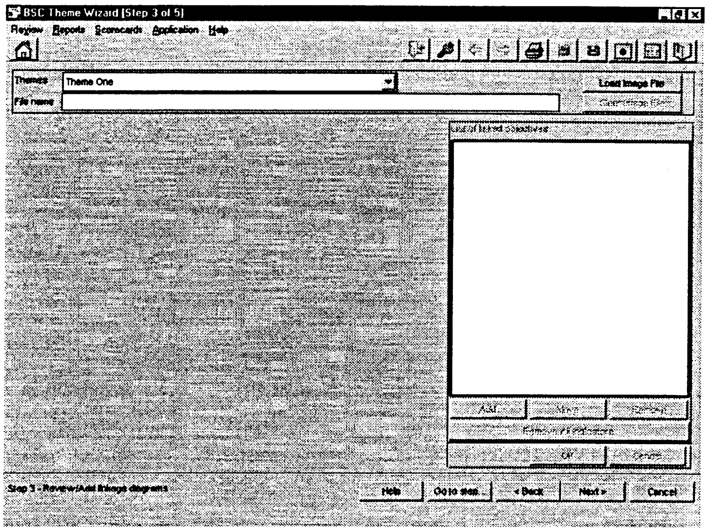
Step 2 - Select objectives

This step exists to create links between objectives and themes. The table will contain all available objectives, grouped by perspective. The column headers will display the themes. A green tick will indicate which objectives are linked to which themes. Clicking on an empty cell will create a link, clicking on a green tick will remove the link.

Theme Wizard - 3



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Step 3 - Review/Add linkage diagrams

This step allows you to define the linkage diagram for each theme.

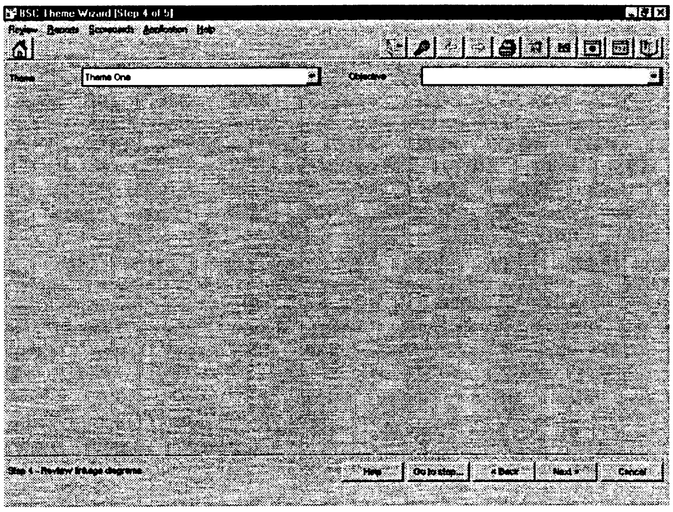
A list of available themes is available.

The *Load Image File* button allows the user to add a diagram which has already been created.

By selecting an objective, clicking on the *Add* button and clicking on a relevant position on the diagram, the objective will be linked to the theme diagram. To remove the link, simply select the objective and click on the *Remove* option.

To start again, simply select the *Clear Image File* button.

Theme Wizard - 4



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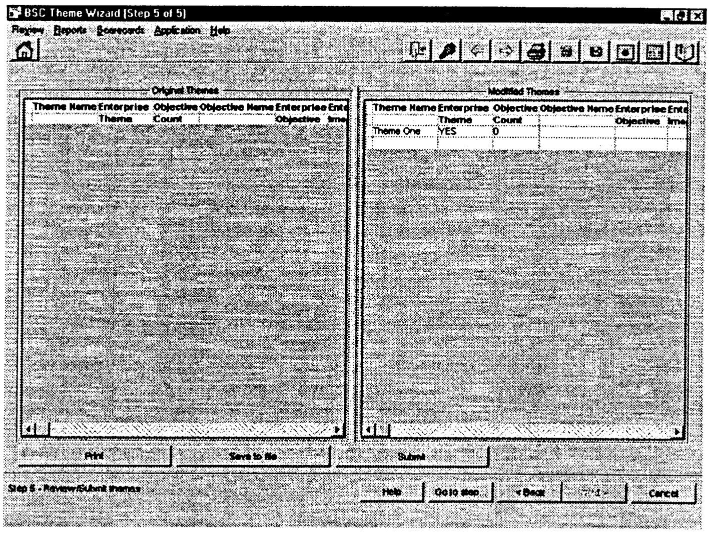
Step 4 - Review linkage diagram

This step allows you to review the objectives that are linked to each theme. These objectives correspond to the currently selected theme. If linkage diagram is available, it will be displayed.

Theme Wizard - 5



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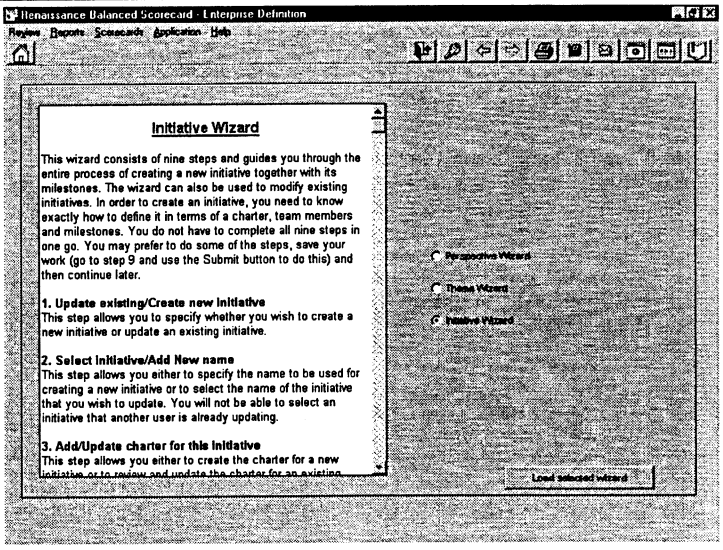
Step 5 - Review/Submit themes

This allows the user to review all the themes, with the left side of the screen displaying all the themes that were originally there and the right side of the screen showing the new and amended details.

Initiative Wizard



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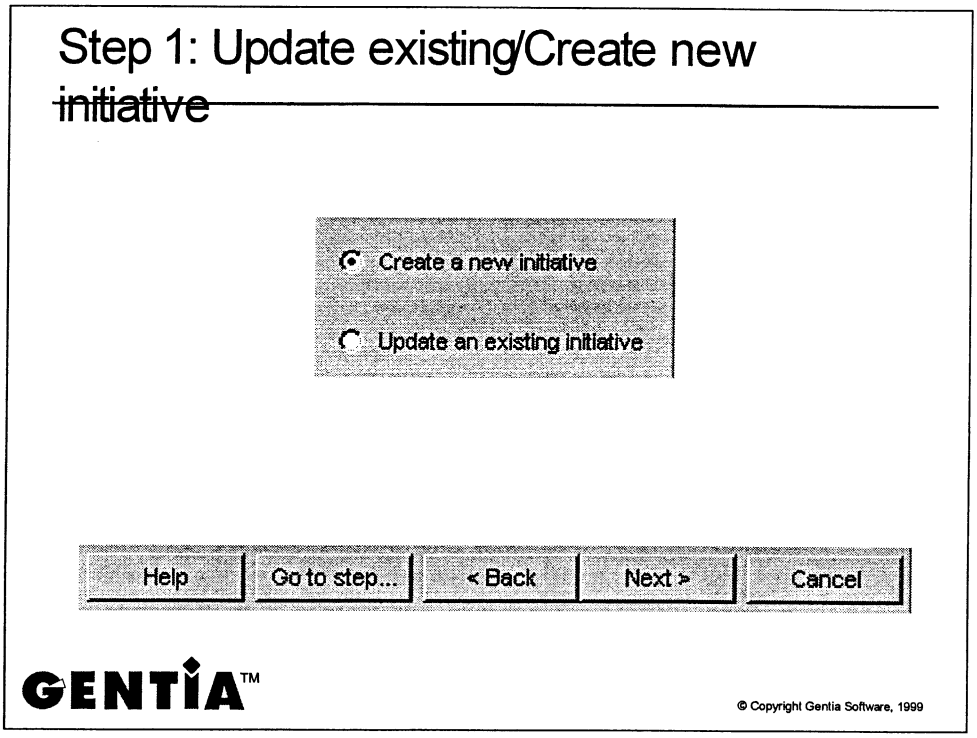
Once you select the *Initiative wizard* radio button, the left-hand side of the page changes to give you information about the **9 steps** in the initiative wizard.

Clicking on the *Load selected wizard* button will take you through to the first step of the initiative wizard.



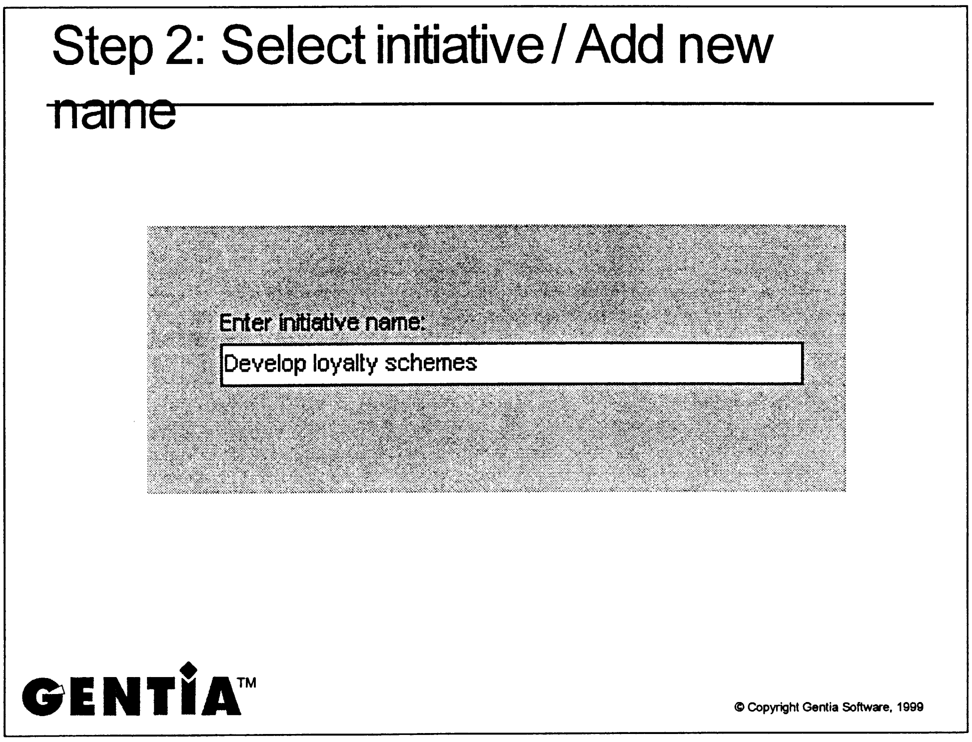
Choose the relevant option and use the *Next* > button to move to step 2.

The buttons exist at the bottom of all the pages in the wizards.

Next - to go to the next step in the wizard
Back - to return to the previous step in the wizard
Go to step… - to return to a previous step, selecting a step from a pop-up list
Help - to access the on-line documentation
Cancel - to exit from the wizard

N.B.. You cannot use the *Go to step…* button to move forward to a step, only backwards to previous steps.

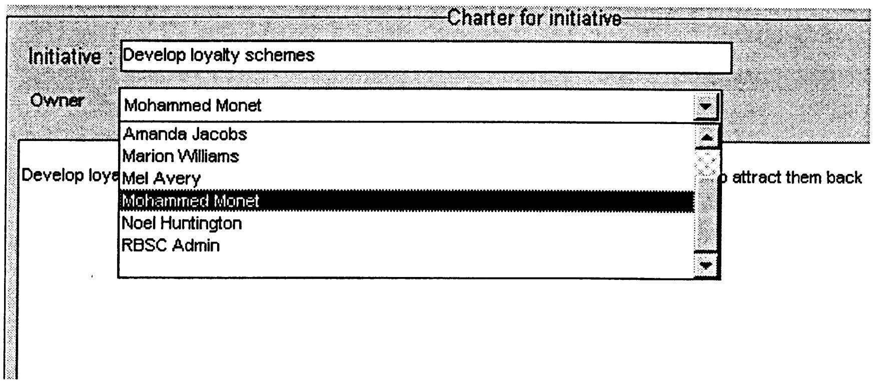
N.B. The standard toolbar at the top of the page is disabled while you are working with a wizard.



Enter the name of the initiative and click on the *Next* > button.

Step 3: Add/Update charter for initiative

- Select the owner for the initiative
- Enter a charter (statement) to define the initiative



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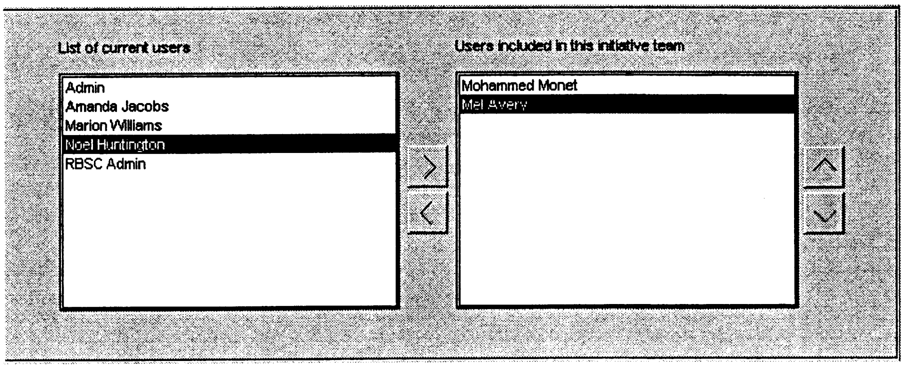
Step three allows the user to add or update a charter for the initiative. A charter is a statement that defines the initiative. In addition, the owner of the initiative is specified here. A user is selected from the drop-down list.

Step 4: Add/Update team members



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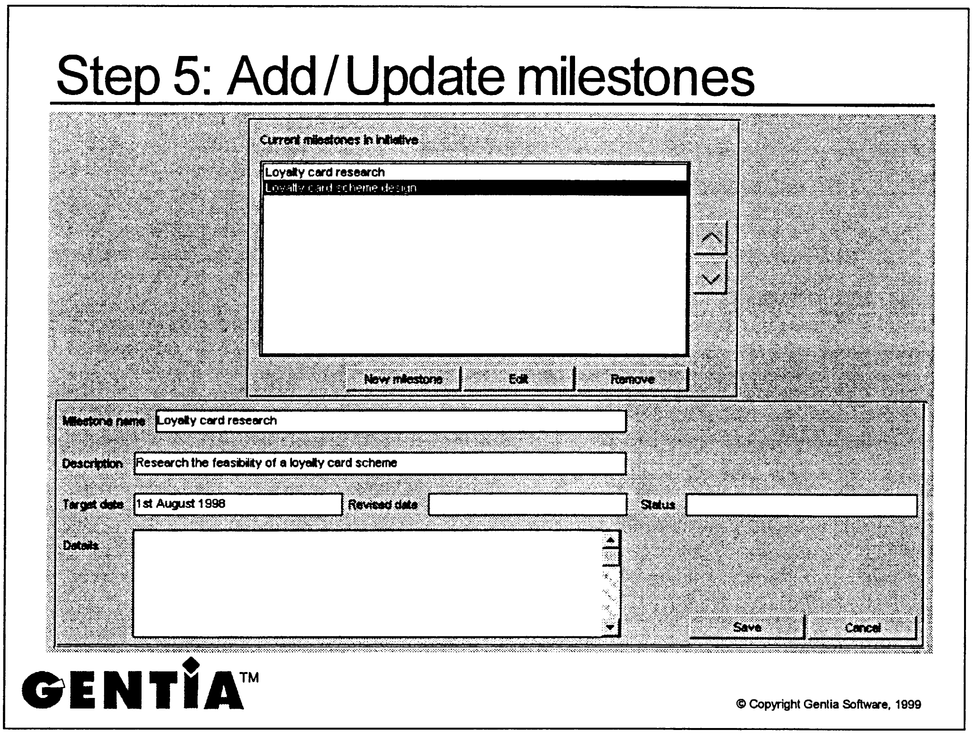
Step 4 is used to specify the members of the team that will carry out this initiative. The left-hand side contains a list of possible users. Use the > and < buttons to copy the users into the right-hand list.

The ∧ and ∨ buttons can be used to re-order the position of each user within the initiative team list.



Click on the *New Milestone* button and the bottom part of the page will become enabled.

All names and descriptions can use up to 40 characters.

The revised date is useful if the initiative is in progress and running late.

The Details area can be used to provide a fuller description if necessary - up to 80 characters.

Click on the *Save* button to save the information for that milestone .

Step 6: Review milestones

Review milestones

Number	Name	Description	Status	Target Date	Revised Date
1	Loyalty card research	Research the feasibility of a		1st August 1998	
		loyalty card scheme			
2	Loyalty card scheme design	Design a scheme for running a		1st September	
		loyalty card			

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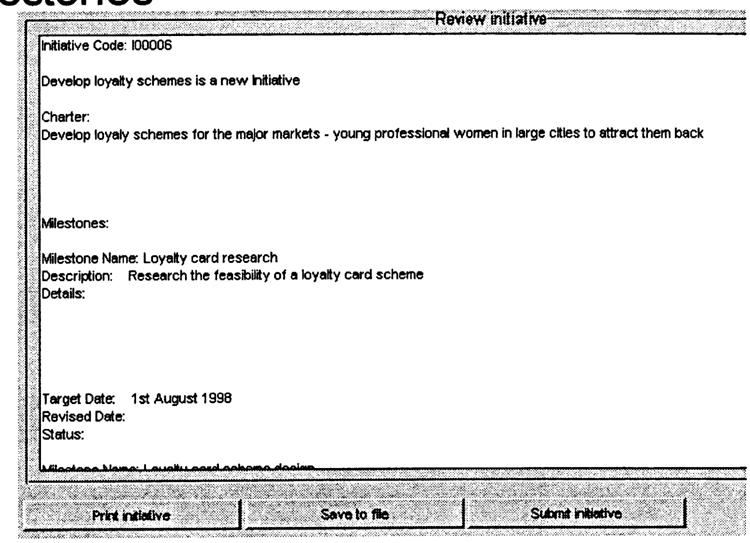
This step allows you to check the details of the milestones for this initiative. You can return to a previous step in order to make any changes.

Steps 7 and 8 of the initiative wizard allow you to link your initiatives to any existing objective.

The left column lists the perspectives. The middle column lists any objectives already defined for the currently selected perspective. The right column lists objectives that have been selected for the current initiative and perspective.

If you have created some initiatives before creating a balanced scorecard, these initiatives would have no associated objectives (objectives are created in step 8 of the scorecard wizard). This does not matter because it is possible to skip steps 7 and 8 of the initiative wizard an complete the links in steps 14 and 15 of the scorecard wizard.

Step 9: Review/Submit initiative & milestones



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This is the final step and allows you to review all the details of the initiative that you have just defined or changed. You can make any changes by returning to the relevant step.

When you are satisfied that everything is correct, click on the *Submit initiative* button, and the initiative will be created in the RBSC application.

Two options are available to help you create a record of your input, as follows:

Print initiative - to get a printed copy of the initiative details.

Save to file - to send the details of the initiative to a text file.

N.B. If you are unable to complete all the steps in the wizard in one work session, you should navigate to the final step and save your work by clicking on the *Submit* button. You can return to the unfinished steps at a later stage. If you do not click on *Submit*, which is only available at the final step, you will lose all of your work.

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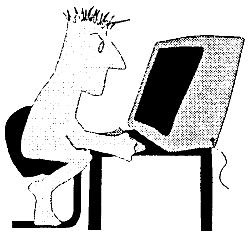
Practical 3.1



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Aim: To complete the Enterprise components of the ClothesHorse RBSC application.

- Select *Scorecard Maintenance⇒Enterprise Definition.*
- Select *Perspective Wizard⇒Load selected wizard* button.

Persective

- Choose *Select Action⇒ 2.Edit*
- Rename the *Learning and Growth* perspective to *Innovation*
- Ensure the *Enterprise Definition* box is checked
- Click *OK*

Objectives

- Choose *Select Action⇒ New*
- Define at least two *Objectives* for each *Perspective*.
- Check the *Enterprise Definition* box in each instant
- Add a *Statement* about the objectives
- Click *OK*

Measures

- Choose *Select Action⇒ New*
- Add a *Measure* for at least one *Objective* in each *Perspective*
- Check the *Enterprise Definition* box for each one
- Add a *Statement* and *Assumption*
- Add a *Synonym*, *Unit of measure* and *Formula*
- Click *OK*

• Choose the *Next* button.

• Review the *Revise Perspectives, Objectives and Measures* list on the right hand side of the screen.

• Select the *Submit* button.

• From the *Submission of "Enterprise Wizard" has completed* information box, select *OK*.

This will return you to the *Enterprise Wizard* screen.

• Select *Theme Wizard⇒Load selected wizard* button.

• Choose *Select Action ⇒ 1.New.*

• Add one theme ***themebp*** and ensure the *Enterprise Definition* box is checked. Click on *Next.*

• Link the relevant objectives to the new theme. Click on *Next.*

• Select the new theme from the drop down list. Add in the ***c:\gentia50\rbsc\themebp.bmp***. Click on *Next.*

• Link the objectives to the diagram.

    • Select the objective.

    • Click *Add* (the diagram changes to a yellow border).

    • Click on the diagram where the button is to be placed.

    • Click on *OK.*

    • Click on *Next.*

• Review the diagram. Click on *Next.*

• Review the theme. If it is unsatisfactory, return to the appropriate step. If it is acceptable, click on the *Submit* button.

• From the *Submission of "Theme Wizard" has completed* information box, select *OK.*

• Use the *Application maintenance⇒User maintenance* option to create the users.

• Select *Initiative Wizard⇒Load selected wizard* button.

• Choose *Create a new initiative.*

• Add at least 3 *Initiatives* for the *Objectives* in each *Perspective*.

• Add a *Charter* for each *Initiative* and include team members for the *Initiative*.

• For at least 4 *Initiatives* define 1-2 *Milestones*.

• Link the *Objectives* to *Initiatives*.

• Review the *Initiatives*. If they are unsatisfactory, return to the appropriate step. If they are acceptable, click on the *Submit initiative* button.

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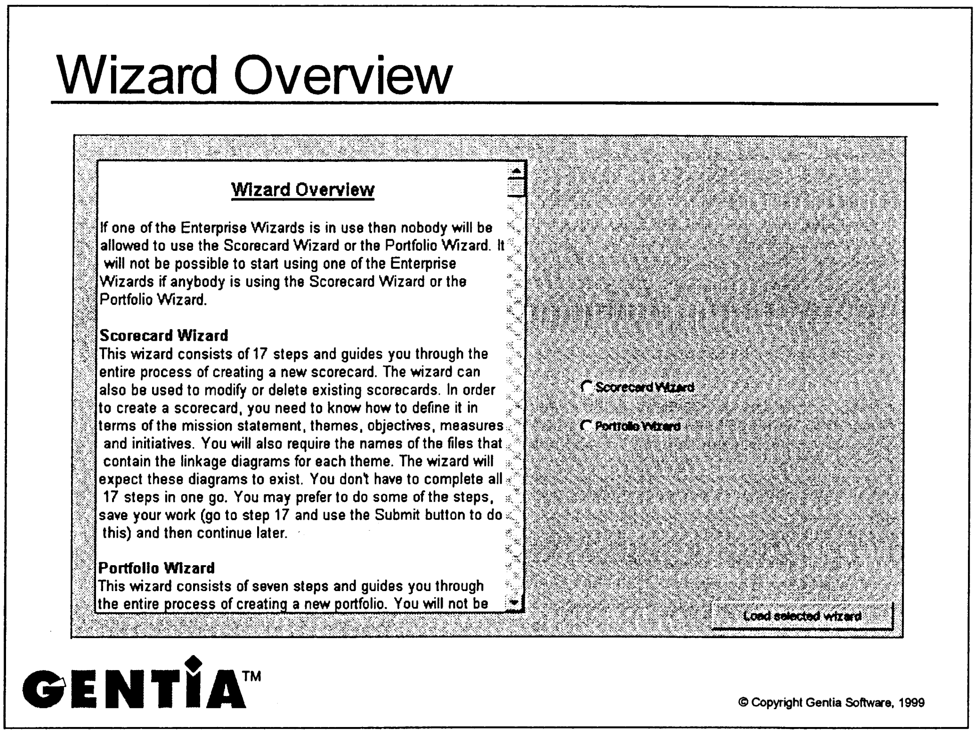

You can select a wizard using the radio buttons on the left-hand side.

On the left-hand side, the *Wizard Overview* narrative provides information about each of the wizards.

The first wizard used should be the *Scorecard Wizard*, as the *Portfolio Wizard* assumes that a scorecard exists.

Scorecard Wizard

- 17 steps
- Before you start the scorecard wizard, need to be clear on:
  - mission statement
  - themes
  - objectives
  - measures
  - initiatives
- Need to have produced a linkage diagram for each theme

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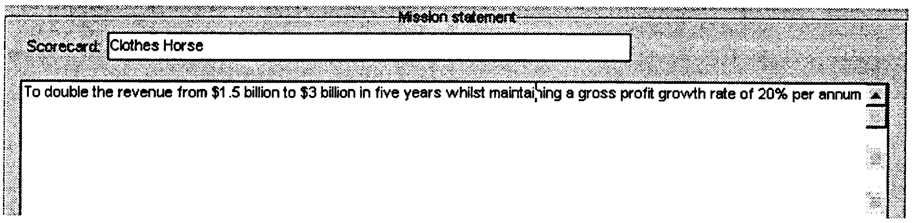
Steps 1-3

- Step 1: Update existing / Create new scorecard
- Step 2: Select scorecard / Add new name
- Step 3: Review / Update the mission statement



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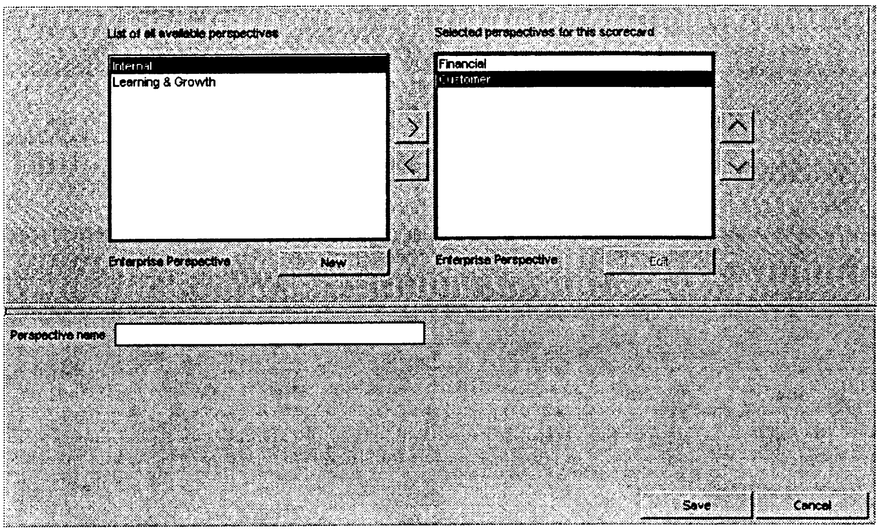
Mission statements are sometimes referred to as visions

Step 4: Select/Add perspectives



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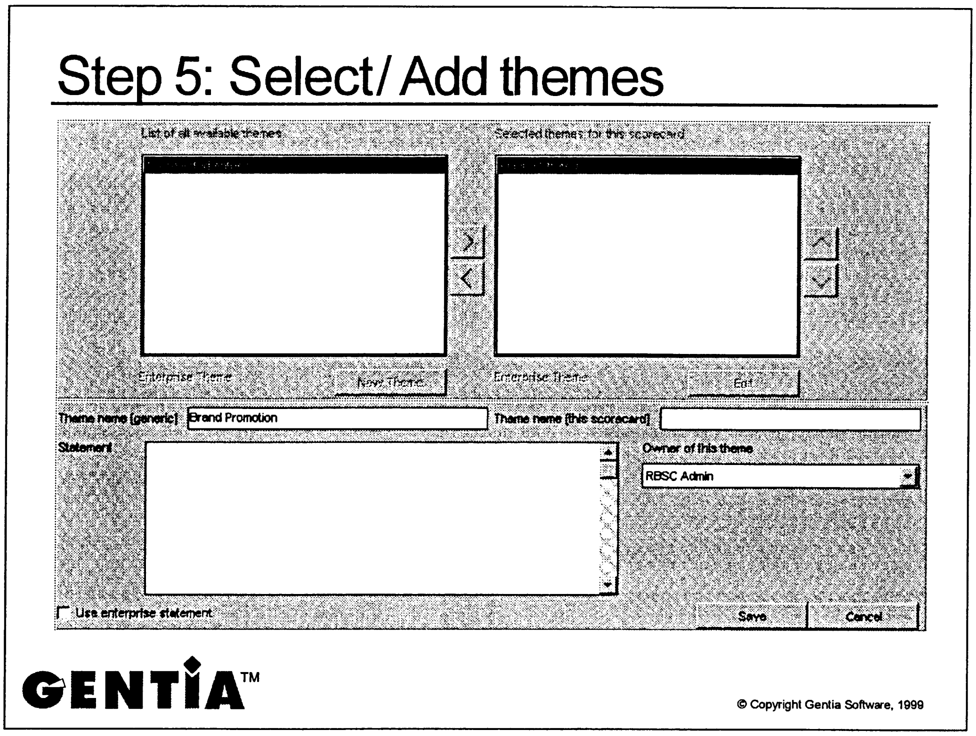
Step 4 is used to specify the perspectives to be included in the scorecard. You are given the 4 default perspectives in the left-hand list. Use the > and < buttons to copy the perspectives that you wish to use into the right-hand list.

The ∧ and ∨ buttons can be used to re-order the position of each perspective within the list.

A scorecard must have at least one perspective.

When you click on the name of a perspective which is an enterprise component, the text *Enterprise Perspective* will appear on the screen.



To select a theme for a scorecard, you can use an existing theme (from the list on the left-hand side of the page) or create a new one and then add it to the scorecard, in which case the bottom part of the page will become enabled.

You must specify an owner from the list and you can enter a statement (or definition) for the theme.

You can also specify a scorecard-specific name in addition to the more general name.

When you select a theme which is an enterprise component, the text *Enterprise Theme* will appear on the screen. If an enterprise theme is included, the user can either use the enterprise statement or create a new statement, specific to this scorecard.

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Step 6: Review selected themes

Review selected themes

New	Owner	Generic Desc	Enterprise Theme	Scorecard Desc	Use Enterprise Statement
YES	RBSC Admin	Pricing Strategy	NO		NO
YES	RBSC Admin	Brand Promotion	NO		NO

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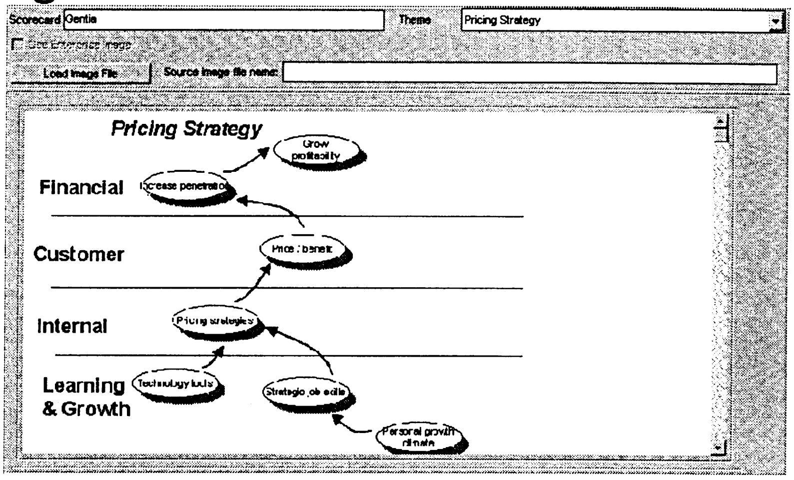
If you wish to make any changes you can return to a previous step.

Step 7: Review / Add linkage diagram



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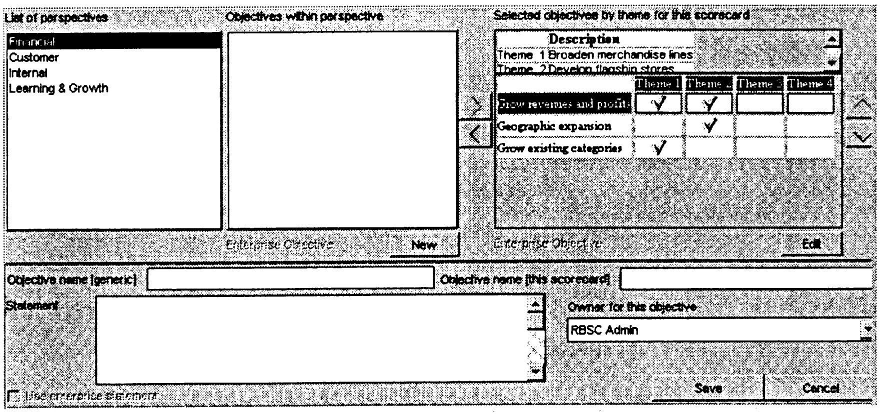
This is where you define the linkage diagram for the themes. You should have a diagram for each theme in your scorecard.

Clicking on the *Load* button will give you a browse facility from which you can select your file. Once you select the name of the file, the diagram will automatically be displayed.

If the users has selected an enterprise theme, then they can use its enterprise image or specify a diagram which is specific to the scorecard.

Step 8: Select/Add objectives



- Step 9: Review selected objectives

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Step 8 allows you to select an objective to be included in this scorecard It also allows the user to add new objectives and link them to existing themes. There must be at least one objective per scorecard. A number of steps are involved, as follows:

1. Select the perspective from the left-hand side window. Any existing objectives within this perspective will be displayed in the window next to it.

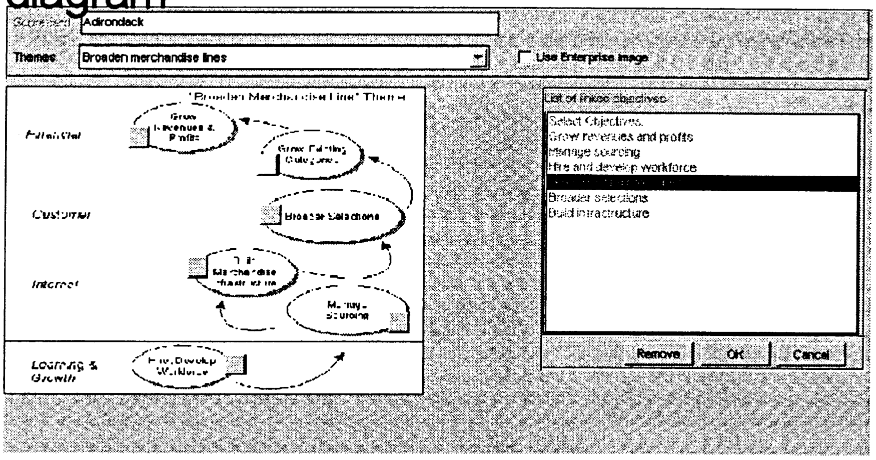
2. Click on the *New* button and enter the details for the new objective in the lower area, including selecting an owner. Click on the *Save* button.

3. Use the box in the top right-hand area to apply the theme(s) to each objective. Simply click in the box as appropriate and a green cross will appear to indicate that the objective belongs to that theme. The full name for each theme is displayed above the table.

When the user selects an enterprise theme (and uses an enterprise linkage diagram file) the *Use Enterprise Image* box will be checked and the objectives will already be linked to the diagram. It is not possible to change these links.

Step 9 allows you to review the objectives. Return to the previous step to make any changes.

Step 10: Link objectives to linkage diagram



- Step 11: Review linkage diagram

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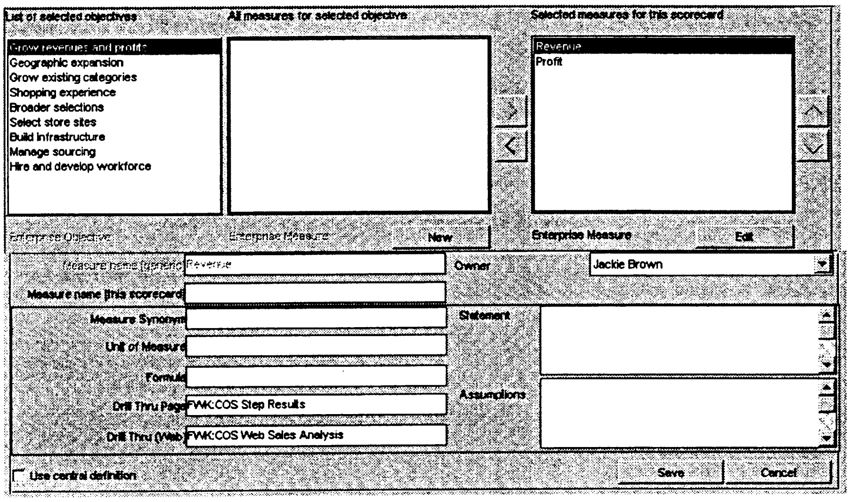
Step 10 allows you to link the objectives to each of the thematic diagrams, by placing an assessment icon for each objective in the diagram.

1. Select the theme from the pick-list at the top.
2. Select an objective from the list on the right-hand side.
3. Click on the linkage diagram in the place where you want the assessment for that objective to appear, e.g. right by the relevant objective would be sensible. Click on *OK* to save the position of the icon
4. Repeat for each of the objectives, so that the linkage diagram has an icon for each of the objectives.
5. Repeat for each of the themes.

Step 11 allows you to review the linkage diagrams.

Step 12: Select/ Add measures



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Step 12 allows you to add new or select previously created measures to the objectives:

1. Select the objective from the left-hand list. Any previously defined measures will appear in the middle list; any required measures can be copied into the list on the right-hand side using the > button.

2. Define new measures by clicking on the *New* button , which makes the lower portion of the screen active.

3. Fill in the details for the measure and click on *Save*, which will transfer the measure to the upper portion of the screen into the right-hand list.

4. The < button can be used to move the measure from the right-hand list to the central list. This will deselect the measure from use in this scorecard, but will allow it to be selectable for other scorecards.

The *Drill Thru Page* and *Drill Thru (web)* options allow the user to access a page from another application to analyze the measure in more detail. The prefix *FWK:* must be used if the page is from a Framework application.

Steps 13 - 17

- Step 13: Review selected measures
- Step 14: Select initiatives
- Step 15: Include new objectives in initiatives
- Step 16: Review selected initiatives
- Step 17: Review / submit scorecard

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Step 13 allows you to review your measures; if you need to make any changes, you can return to a previous step.

In **step 14** you can select which already defined initiatives you require for this scorecard.

For each selected initiative, **step 15** allows you to select which objectives are to be associated with already created initiatives.

N.B. Only **new** objectives will be displayed, i.e. only objectives created when the scorecard was first created. If you need to associate any initiatives with previously created objectives, use the *Initiative wizard*.

Step 16 provides a review of initiatives for each objective and a review of objectives for each initiative.

Step 17 is the final step in the scorecard wizard which allows you to submit the scorecard.

Summary: Scorecard Wizard

- 17 steps to define:
  - mission statement
  - perspectives
  - themes
  - the link between objectives and the linkage diagram
  - measures
  - the link between initiatives and objectives

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Practical 3.2

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Aim: To build a scorecard for the ClothesHorse application.

- Use the scorecard wizard to define the details for the Clothes Horse scorecard from the case study, selecting the relevant components from the available *(Enterprise)* components.
    - All 4 perspectives
    - Select the ***themebp*** theme and add the ***themeps*** using the file located in **c:\gentia50\rbsc\themeps.ppt**.
    - All objectives
    - All the measures for each of the objectives.
- Rename at least one objective in each perspective to a new name, making it unique to this scorecard.

Portfolio Wizard

- Step 1: Update existing / Create new portfolio
- Step 2: Select portfolio / Add new name
- Step 3: Select scorecards to include
- Step 4: Select components
  - Select components that are to be included in this portfolio
- Step 5: Select components order
- Step 6: Review selected components
- Step 7: Review/Submit portfolio

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Step 1 creates, updates or removes a portfolio.

Step 2 allows a user to name a new portfolio or select an existing portfolio, providing it is not being updated by another user.

Step 3 is used to select the scorecards to be used within this portfolio.

Step 4 allows the user to select all the perspectives, themes, objectives, measures and initiatives to be included within the portfolio.

NB. All portfolios must contain at least one perspective and one objective. The *common components* and *all components* options are there to aid the selection process. They do not form part of the actual portfolio definition.

Step 5 allows the user to order the components of the portfolio, as far as the display is concerned.

Step 6 reviews the selected components.

Step 7 Reviews the portfolio and allows the user to *Submit* it (or create) the portfolio in the database.

Summary: Building a BSC 1

- Login as *RBSC Admin*
- Creating new users
- Enterprise Definition
  - Perspective wizard
  - Theme wizard
  - Initiative wizard

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Summary: Building a BSC 2

- ◆ Scorecard wizard
- ◆ Portfolio wizard
- ◆ Before you start, ensure that
  - Design of BSC - complete (conceptually)
  - Linkage diagram - drawn electronically
    - N.B. colour palette
  - Scorecard users identified

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4. Application Maintenance

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Additional Information

- Data Loading
- Architecture
- Scorecard maintenance

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Data Loading vs. Data Entry

- Data Loading
  - External files
  - Large volumes
  - External applications
- Data Entry
  - Manual input
  - Daily / weekly / monthly operation
  - Small volumes
  - Maintain scorecard

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Data loading differs from data entry in a number of ways. Data loading refers to the process of loading large quantities of data from an external file (specially prepared for use with the RBSC) into the scorecard. It might typically be used when the scorecard is being built (to populate it quickly and easily) or if an external application is providing data to be used by the scorecard.

Data entry is the manual inputting of data on a day to day basis. This data is the responsibility of the owner of individual measure. It is usually a small amount of data and is keyed directly into the scorecard.

In addition, it is possible to use the Gentia Excel Add-In for RBSC data entry and for creating user views and reports. This is a feature of the Add-In product and information is available separately.

Data Loading

- Data loading for ***measures***
  - assessment indicators
  - actual / plan / forecast values
- Must be done from *author mode*
- Must build a scorecard first
- Must be RBSC Administrator

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It is possible to load data from an external file into the RBSC. This is only available to Gentia consultants, because it must be done from *author mode*.

The data loading can only be completed when there is at least one scorecard in existence. The layout of the data file must follow a rigid structure:

- Field1 - cycle (name or code)
- Field2 - month (name or code)
- Field3 - scorecard (name or code)
- Field4 - measure (this is defined at step 12 of the scorecard wizard)
- Field5 - actual value
- Field6 - target value
- Field7 - forecast value
- Field8 - assessment indicator (**1**-*good*, **2**-*average*, **3**-*bad*)

The file must be separated by commas and fields 1 to 4 must be present. Fields 5 to 8 are optional. If a field is excluded, the comma must still exist to show the empty field. If the set-up is client / server, the data file must be located on the server.

Performing a Data Load

- Create data file
- Start RBSC and switch to *author mode*
- Edit text object *BSC Data Measure*
  - in *RBSC Admin* chapter, in *BSC Admin* book
- Access the *business model inspector*
- Run task called *BSC Data Load - measure*
- Load the base model *Strategy* with the holder called *Data - measure*

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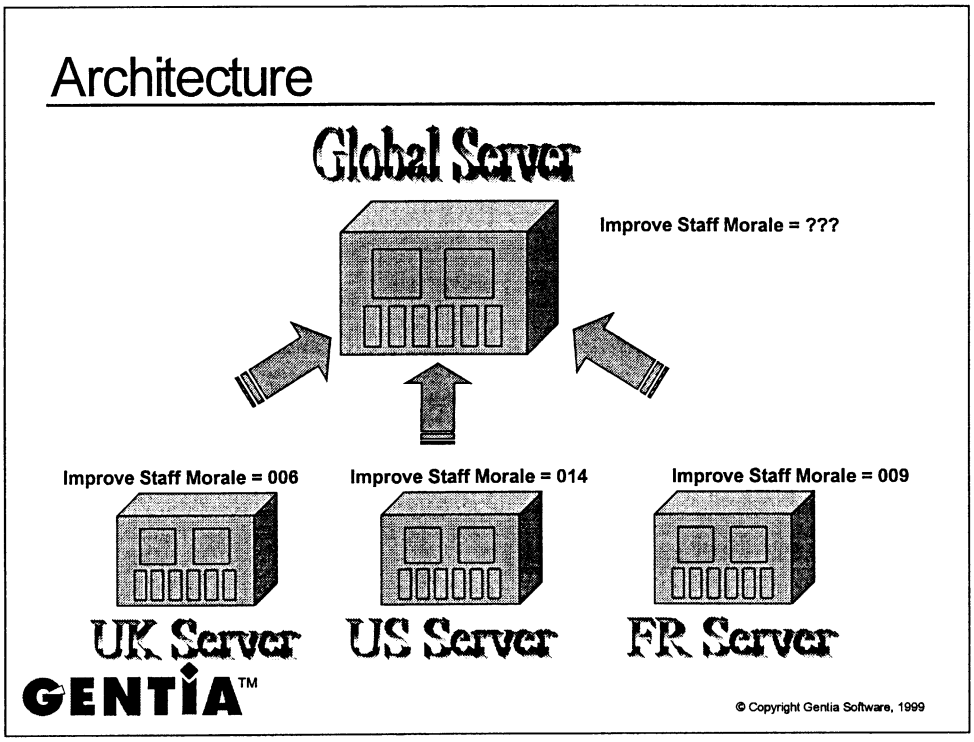
Follow these steps to perform a data load:

- Build a scorecard with measures and synonyms for these measures.
- Create the file for the data loading.
- Remove (or comment out) the DISABLE_TOOLBAR 1 command in the gentia.ini file.
- Start the RBSC application.
- Log in as RBSC Admin.
- Enter Gentia author mode.
- Store the name of the data file in the text object called ***BSC Data Measure*** in the chapter called ***RBSC Admin*** on the book called ***BSC Admin***.

filename=c:\gentia50\rbsc\data\file1.csv

If working in client/server mode, the data must be kept on the server.

- Use any Model Spec in ***BSC Admin*** to access the Business Model Inspector.
- Select the BSC Business Model.
- Select *Edit Tasks.*
- Select the task called *BSC Data Load - Measure.*
- Click on the *Run* button.
- Return to the Business Model BSC (in the Business Model Inspector).
- Select *Edit Models*.
- Select the base model called *Strategy* and select *Load Model.*
- Select the holder called *Data - Measure* and click on *Start Load* Button.
- The data will now be loaded into the RBSC database.



Special consideration must be given to the location of the RBSC Application when it is initially set-up and installed. The way the RBSC code works is to allocate a sequential number to each scorecard, objective, measure etc. These numbers are stored in the tables which make up the RBSC files.

If the scorecard files from a number of servers were to be moved to a more central server, this could potentially cause problems. Each RBSC application might have the same allocation number for a different scorecard (or measure or objective) and this would mean that there would be confusion as to which scorecard should be used.

The simple solution to this is to ensure that the files of the RBSC application are placed on the correct server at installation time. This server should be as central to the hub of the company as possible and preferably hold all the company's RBSC application files.

Scorecard Maintenance

- Application Maintenance
  - User maintenance
  - System defaults
  - Version names
  - Current month / year
  - User Defaults
  - Change Password
  - Application Lock Maintenance
- Reports

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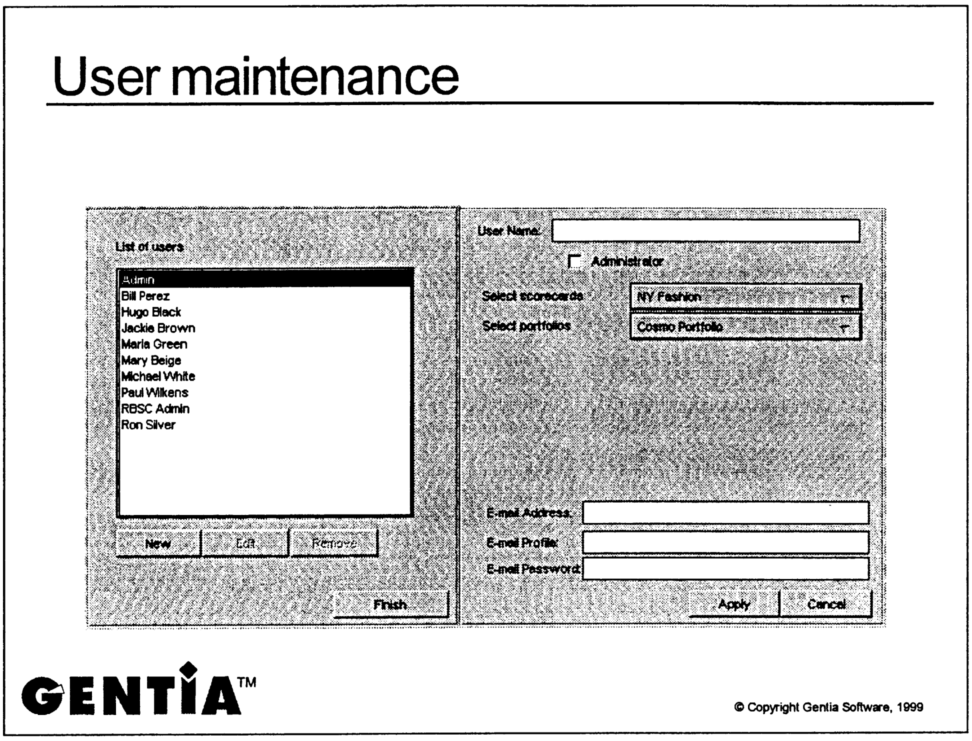
Application maintenance deals with the administration side of the RBSC.



User maintenance allows the RBSC Administrator user to see a list of all users and all necessary information about those users.

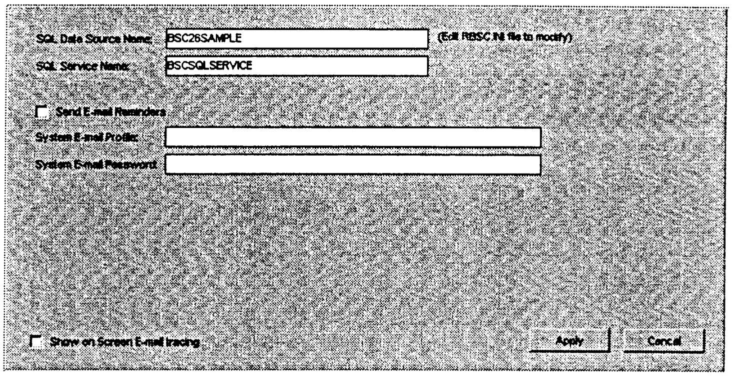
In addition, new users can be added and given access to selected scorecards and selected portfolios.

This information should be done **before** defining initiatives, scorecards and portfolios.

The *Administrator* check box denotes the user as having RBSC Administrator rights which allows them access to certain functions not accessible by other users.

If the user wishes to use the RBSC email facility the user's email address, profile and password should be entered at the bottom of the screen.

System defaults



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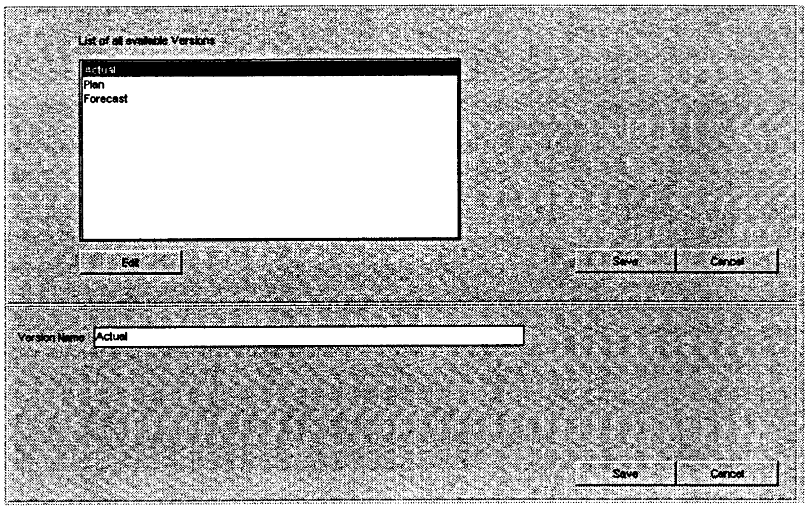
This page allows the RBSC Administrator to view or edit certain SQL defaults.

The SQL Data Source Name - which is used for the ODBC connection to the RBSC schema files; the default value is BSC.

The SQL Service Name - which is the name of the service used for the ODBC connection to the RBSC schema files; the default value is BSCSQLSERVICE.

Version Names



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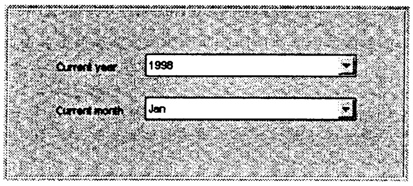
This function allows the RBSC Administrator to change the names of the three versions for the measure values. They are (by default) *Actual, Plan* and *Forecast*.

Current month Wizard



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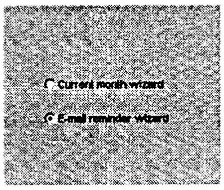
This option is a 1 step wizard that allows the RBSC Administrator to select the current month and year and save them.

Email Reminder Wizard



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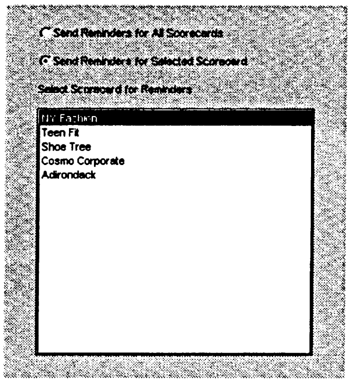
The email reminder wizard allows the RBSC Administrator to send email reminders to all users with overdue assessments. The wizard can be used at any time.

Email Reminder Wizard



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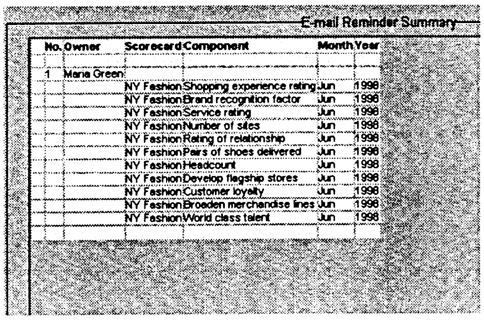
Step 1 - allows the Administrator to select whether to use the reminder function against all scorecards or against selected scorecards.

Email Reminder Wizard



E-mail Reminder Summary

No.	Owner	Scorecard	Component	Month	Year
1	Maria Green				
		NY Fashion	Shopping experience rating	Jun	1998
		NY Fashion	Brand recognition factor	Jun	1998
		NY Fashion	Service rating	Jun	1998
		NY Fashion	Number of sites	Jun	1998
		NY Fashion	Rating of relationship	Jun	1998
		NY Fashion	Pairs of shoes delivered	Jun	1998
		NY Fashion	Headcount	Jun	1998
		NY Fashion	Develop flagship stores	Jun	1998
		NY Fashion	Customer loyalty	Jun	1998
		NY Fashion	Broaden merchandise lines	Jun	1998
		NY Fashion	World class talent	Jun	1998

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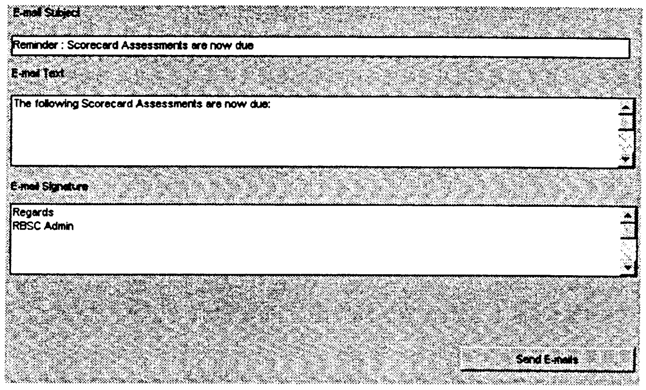
Step 2 - allows the Administrator to review all emails that will be sent to each user. This list includes the name of the user, the scorecard, the component to be assessed and the month and year for which the assessment is overdue.

Email Reminder Wizard



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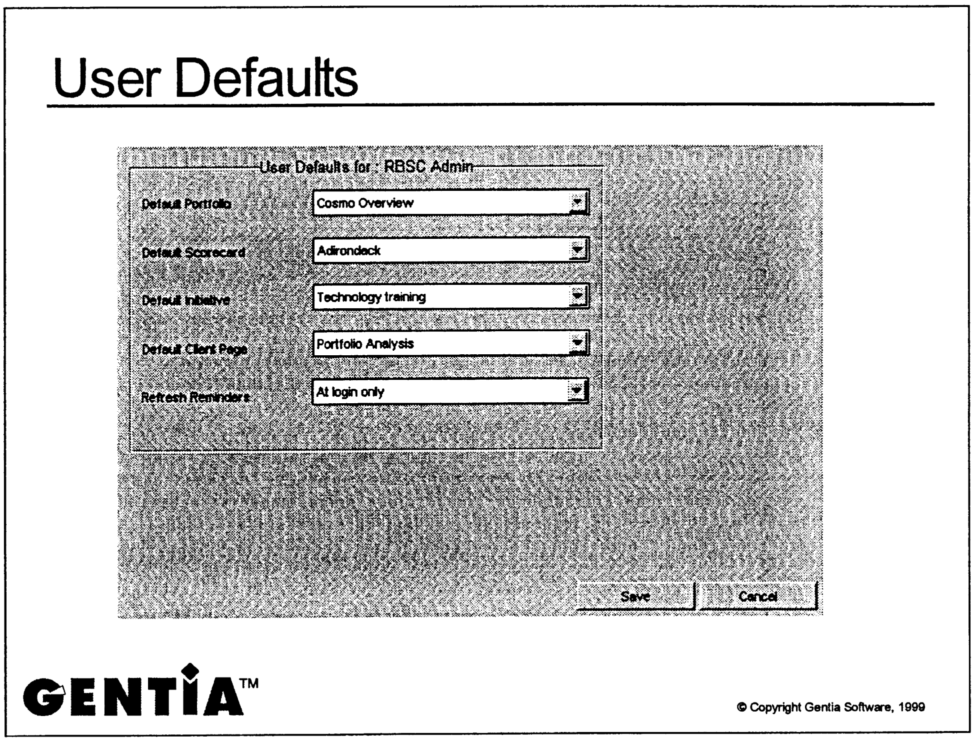
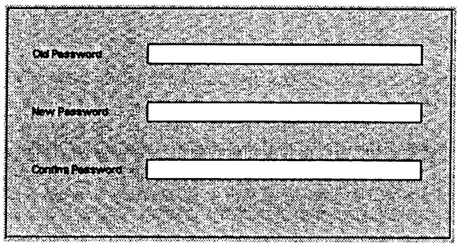
Step 3 - allows the Administrator to amend the defaults for email subject, text and signature, before clicking on the *Send E-mail* button.



The *User defaults* section allows the user to select the default options, which happen when they first logon.

Application maintenance

- Change password



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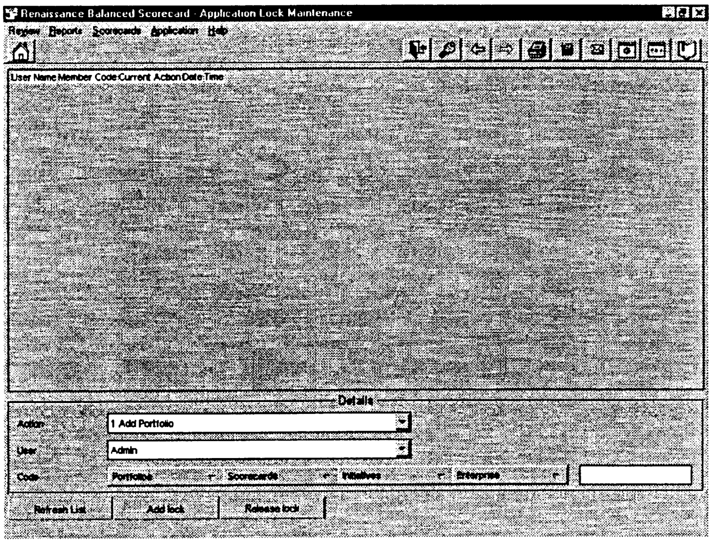
Passwords must be at least 6 characters.

Application Lock Maintenance



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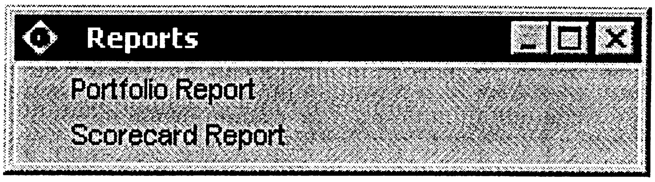
A ***lock*** happens when one of the wizards is used. It stops any other user accessing that particular scorecard whilst it is being amended. Once the user stops using the wizard, the lock is automatically removed.

The RBSC Administrator is allowed to manually create or remove a lock. This might be needed if (for example) the server crashed while the wizard was running. In addition, the Administrator might want to prevent users from accessing a particular scorecard.

This page shows a list of current locks with a variety of lock details.

Reports

- Two report choices are available



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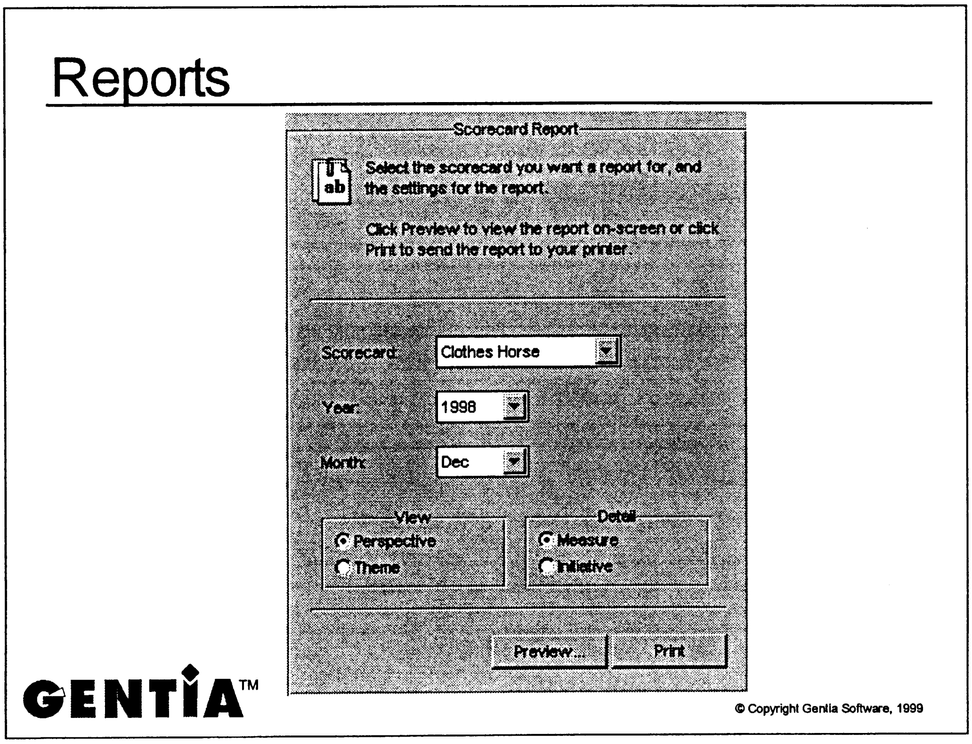
In addition, the user can print from the Measure Analysis page. (see chapter 1).



The user simply selects the setting and the report to be printed. There is an option to preview the report first.

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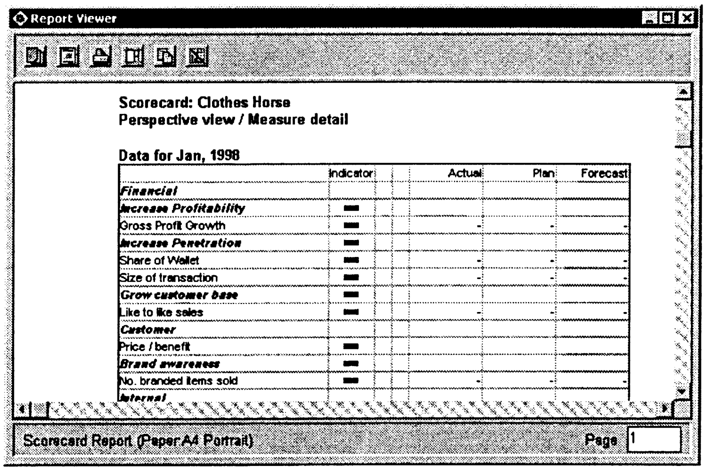
Reports



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The report is displayed using Gentia's Report Builder Facility which allows you to format and print reports as necessary.