ObjTracker - Balanced Scorecard

Administrator Guide

Target Audience:

The website administrator installs this application and appoints one or more Balanced Scorecard **administrators** by giving that user ID a “objtrackeradmin” capability.

The Balanced Scorecard administrator must do an initial setup, define Balanced Scorecard users and departments, create objectives, and manage the application on an on going basis so that Balanced Scorecard users can input the measurements and add attachments.

For this plugin add website administrator must add the capability “**objtracker**” if the user doesn't have the “**objtrackeradmin**” capability. If either is assigned then Tools menu will have an entry and be able to invoke the plugin.

The Balanced Scorecard administrator generally should be either an administrative assistant to the organization's executive or department leaders.

Table of Contents

A.1 Administrative pages for initial setup and beyond.

During initial setup and beyond, you will be primarily making changes to the following tables:

1. Organization – usually for the initial setup only.
2. Fiscal Years
3. Departments
4. People

When the Balanced Scorecard is first installed, all of these tables need to be updated as described below. Subsequently, the tables need to be modified when people or departments change in your organization and as new fiscal years occur.

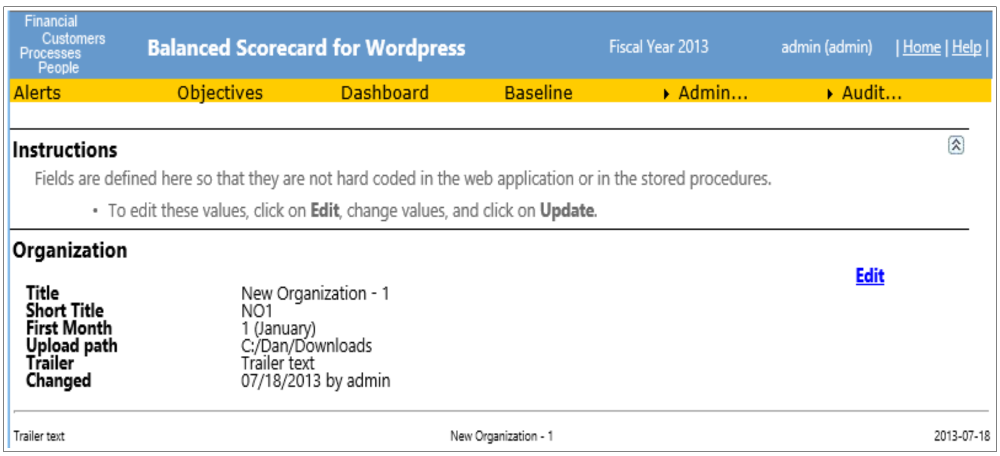
The complete set of tables that objectives refer to.

Table	Initial Setup	Changes
Department	Required	Defines departments
Fiscal Year	Required	Defines fiscal years
Frequency		Provide alternate spelling of annual, bi-annual, etc
Metric Type		Provide alternate spelling of date, dollar, etc
Objective Type		Provide alternate spelling of customer, financial
Organization	Required	Defines organization name, month of fiscal year, file upload path, etc.
People	Required	People who are responsible for objectives

A.1.1 Organization values

During initial setup:

1. Click on **Admin**… in the menu and then click **Organization,** then click **Edit.**
2. Replace the values provided
    1. Verify that the first month of the fiscal year is correct for your organization. This field is important to the setup. After defining a fiscal year, you will not be able to change the first month value without either deleting all fiscal years and or objectives or doing a full re-initialize of the database!
    2. Replace the file upload path
3. Click **Update** to validate the values including that the upload path is writable.



Beyond the initial setup, when any of the organizational values change:

1. Click on **Admin**… in the menu and then click **Organization**.
2. Follow the instructions at the top of the page to add additional departments, edit department names, or delete departments.

Organization field descriptions

Field	Description
Title	Name of the organization
Short Title	Abbreviated name of the organization
1st Month	The month that the fiscal year begins.
Upload Path	Name of the directory on the server where the attachments will be uploaded.
Trailer	Value is placed at on the left side of the bottom of all pages.

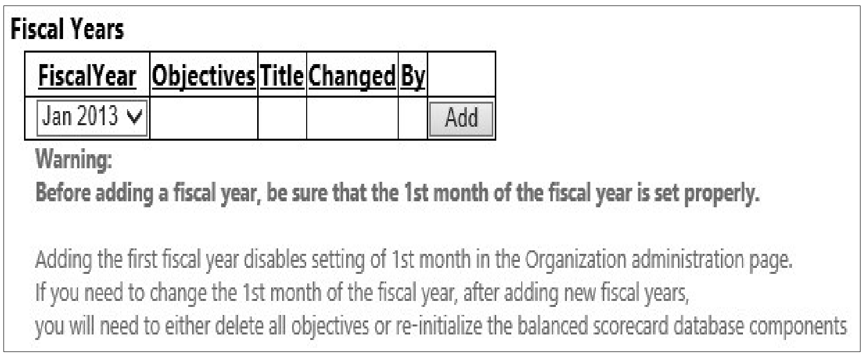
A.1.2 Fiscal years

The Balanced Scorecard uses the fiscal years table when defining or modifying an objective. For many organizations the fiscal year begins on the first of January. For others, the fiscal year begins on a quarter and for these organizations, how they refer to each fiscal year varies. This configuration page deals with which fiscal years are important and how you refer to them.

During initial setup, you must define at least one fiscal year. Before adding the first fiscal year, go to the Admin Organization page and set the month that your fiscal year begins if you haven't done that already.

During initial setup:

1. To add a fiscal year, click on **Admin**… then click on **Fiscal Years**.
2. To add fiscal years, select from **New Fiscal Year**, and then click **Add**.



Beyond the initial setup, when any of the fiscal year values change:

1. Click on **Admin**… in the menu and then click **Fiscal Years**.
2. Follow the instructions at the top of the page to add additional fiscal years, edit their names, or delete fiscal years.

Fiscal year field descriptions

Field	Description
Fiscal Year	Integer value representing the year that the fiscal year starts.
Objectives	A link to a list of the objectives whose span of fiscal years include this fiscal year.
Title	The name that will be used to refer to a fiscal year. For example 2013-2014 or FY 2013.
Delete	A Delete link appears if this year is not in use by any objective.

A.1.3 Departments

The Balanced Scorecard uses the Department table when defining people, and as a selection criterion to limit the objectives displayed by department.

During initial setup:

1. Click **Admin**…in the menu and then click **Department**.
2. Click on **Edit**, replace the title and short title provided, and then click on **Update**.
3. If you want to create additional departments at this time, enter new department values in the fields of the footer row of the table and then click on **Add**.

Departments

ID	People	Title	Short Title	Active	Changed	By	
1	Yes:1	Replace me at setup	Replace	Yes	07/04/2013	Init	Edit
							Add

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When any of the departmental values change:

1. Click on **Admin**… in the menu and then click **Organization**.
2. Follow the instructions at the top of the page to add additional departments, edit department names, or delete departments.

Department field descriptions

Field	Description
ID	A value provided for assisting application debugging.
People	A link to a list of the people assigned to the department.
Title	Name of the department
Short Title	Abbreviated name of the department
Active	Generally “Yes”. Change to “No” when a department no longer exits but you want to keep all of that departments objectives. When set to “No”, the drop down selections change for adding new people – only active departments appear, for updating people and for Objectives – inactive departments will appear at the end of the list.
Delete	A Delete link appears if this department is not in use by any person.

A.1.4 People

The Balanced Scorecard uses the people table when a starts the application. It defines the owner of an objective. To manage people, click **Admin**…in the menu and then click **People**.

During initial setup:

1. Click **Admin**…in the menu and then click **People**.
2. Click on **Edit**, replace the full name, reassign your user ID to the correct department, and then click on **Update**.
3. If you want to add additional people at this time, enter new values in the fields of the footer row of the table and then click on **Add**.

People

	ID	Objectives	Logon ID	Full Name	Admin	Active	Department	Changed	By	
Edit	1	None	admin	admin	Yes	Yes	Replace me at setup	07/04/2013	initialAdmin	
					No		Replace me at setup			Add

Excel Download

When any of the personnel change:

1. Click on **Admin**… in the menu and then click **People**.
2. Follow the instructions at the top of the page to add additional people, edit people names, or delete people.

People field descriptions

Field	Description
ID	Read-only value provided for assisting application debugging.
Objectives	Read-only link to a list of the objectives assigned to the person.
Full Name	Name of the person.
Logon ID	Value that person must enter as user ID on the log on page.
Department	Department to which the person is assigned.
Admin	Yes indicates that this person may update tables in the Admin menu selection, define and alter objectives, and alter any user's measurements.
Active	Generally "Yes". Change to "No" when a person is no longer in the org but you want to keep all of that person's objectives. When set to "No", the drop down selections change for adding new objectives – only active people appear, for updating objectives – inactive people will appear at the end of the list.
Delete	This column has a Delete link when the row is not referenced by any objective.

A.2 Managing objectives

A.2.1 Understanding target values

The balanced scorecard uses an objective’s target values to assign a status to the objective. When you define an objective, you must set the metric type and an initial set of targets that will be propagated through the range of fiscal year specified.

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

The measurement matches or exceeds objective.

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

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

The measurement is far from the target.

No measurement has been entered.

Target greater than near target greater than far target

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

Examples:

When a greater value is preferred:

- Higher attendance is better.
- Higher donations level is better.
- Completing more of the task is better.

When on a time line, a later date is preferred:

- It is better when the funds in an account last longer.
- It is better when the truck lasts longer.

Target less than near target less than far target

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

Examples:

Lower value is preferred:

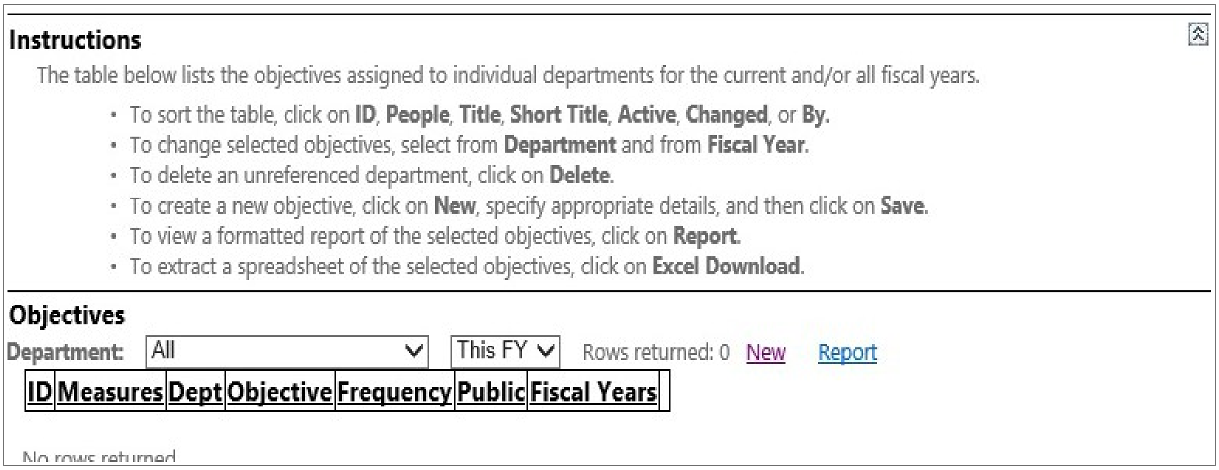
- Lower truancy is better.
- Lower number of sick days is better.

When on a time line, an earlier date is preferred:

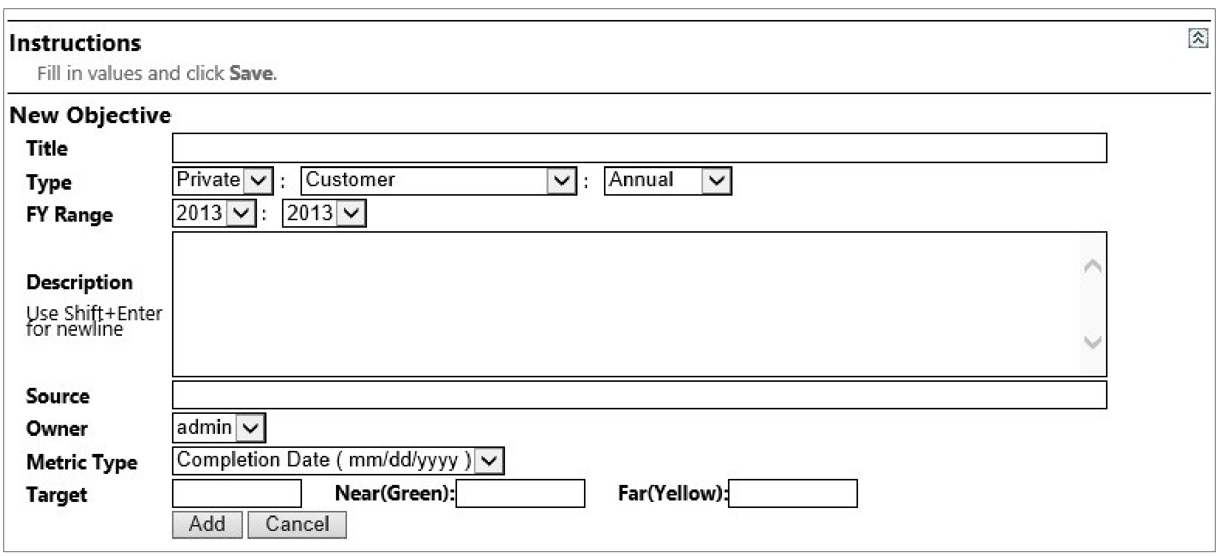
- It is better to complete a building earlier.
- It is better to reach a donation level earlier.

A.2.2 Adding a new objective and its target values

To add a new objective, click **Objectives**…. in the menu and then click **New**.



New objective



All of the above values except for the frequency of measurements and metric type can later be changed as described below in the description for updating an objective..

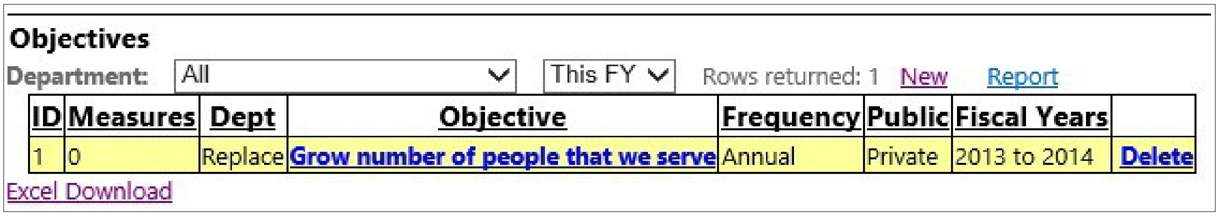
New objective field descriptions

Field	Description
Title	Name of the objective, limited to 100 characters.
FY Range	Beginning and ending fiscal years.
Type	1. Visibility: Public or Private (not currently used by this application) 2. Type: Customer, Financial, Process, or Employee 3. Frequency: Annual, Bi-annual, Quarterly, or Monthly
Description	Verbose discussion of the objective’s purpose and measurements. To aid in

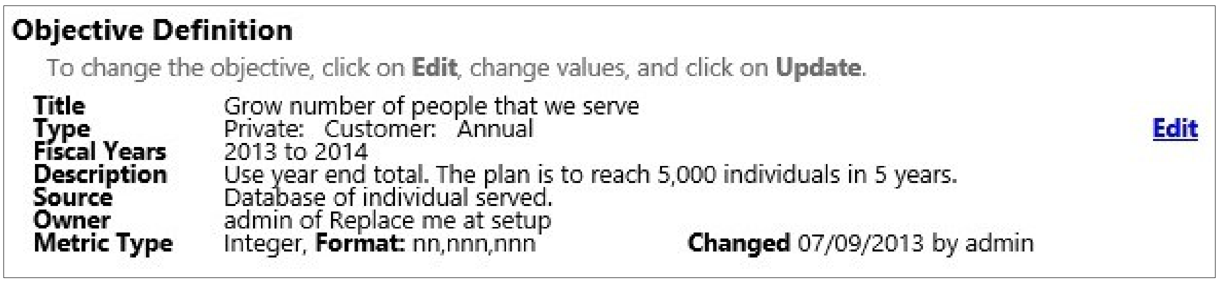
	the forming of paragraphs within the description, use Shift+Enter to create a new line. Maximum length is 1024 characters.
Source	100 character field indicating the documents that used for the measurements.
Owner	The person responsible for the objective
Metric Type	Completion Date, Dollar, Integer, Percentage, or Ratio format of targets and measurements.
Target	The numeric goal of the objective. This value will be propagated for each year of the fiscal year range specified. On the objective update page, values can be set for each fiscal year.
Near Target	A numeric value that is short of achieving the objective. This value will be propagated for each year of the fiscal year range specified. On the objective update page, values can be set for each fiscal year.
Far Target	A numeric value that is further from achieving the objective. This value will be propagated for each year of the fiscal year range specified. On the objective update page, values can be set for each fiscal year.

A.2.3 Updating an objective definition

To modify an objective, click **Objectives** in the Menu, then click on the name of the objective.



In the first panel of the Objective page, click the name of the objective that you wish to view or modify.



Click **Edit** to modify the objective definition.

Make changes and click **Update**.

Objective field descriptions

Field	Description
Title	Name of the objective, limited to 100 characters.
FY Range	Beginning and ending fiscal years.
Type	1. Visibility: Public or Private (not currently used by this application) 2. Type: Customer, Financial, Process, or Employee 3. Ready only frequency set when the objective was created: Annual, Bi-annual, Quarterly, or Monthly
Description	Verbose discussion of the objective’s purpose and measurements. To aid in the forming of paragraphs within the description, use Shift+Enter to create a new line. Maximum length is 1024 characters.
Source	100 character field indicating the documents that used for the measurements.
Owner	The person responsible for the objective
Metric Type	Read only value of the metric type set when the objective was created. Completion Date, Dollar, Integer, Percentage, or Ratio format of targets and measurements.

A.2.4 Updating an objective's targets

In the middle panel of the Objective page, click the **Edit**, revise the target values, and click on **Update**.

Fiscal Year Targets

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

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

Refer to the description of targets **A.2.1 Understanding Target Values**.

A.2.5 Editing measurements

In the last panel of the Objective page, you will find the Measurements Recorded section which lists both the measurements that have been entered as well as the measurement intervals that are missing.

The picture below shows no measurements and two missing measurement intervals that have already occurred. This can be easily reproduced by defining an objective with either a prior fiscal year or having multiple frequencies that have already occurred.

The expectation is that users will use the Alert page to fill in their measurements. This page is an alternative to using the Alert page.

Measurements Recorded

No Measurements recorded

Click **Add** to add missing.

	Period
Add	2012-01-01
Add	2013-01-01

Click on the first Add which yields the following which has entry for the measurement period but missing a value of the measurement and a status indicating that the measurement is missing.

Measurements Recorded

To change a measurement, click on **Edit**, change the value(s), and click on **Update**.
Internal error: C_ErrorID not set by P_MeasurementInsert

ID	Status	Docs	Starting	Measure	Notes	Changed	By	
1		None	2012-01-01			07/09/2013	admin	Edit Delete

Click **Add** to add missing.

	Period
Add	2013-01-01

Click on Edit and try to enter measurement values – they are validated and must match the objective's type of metric type.

Measurements Recorded

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

ID	Status	Docs	Starting	Measure	Notes	Changed	By	
1		None	2012-01-01	2		07/09/2013	admin	Edit Delete

Click **Add** to add missing.

	Period
Add	2013-01-01

Enter a measurement in the format indicated on the objective definition or revise the note. You can use Shift-.

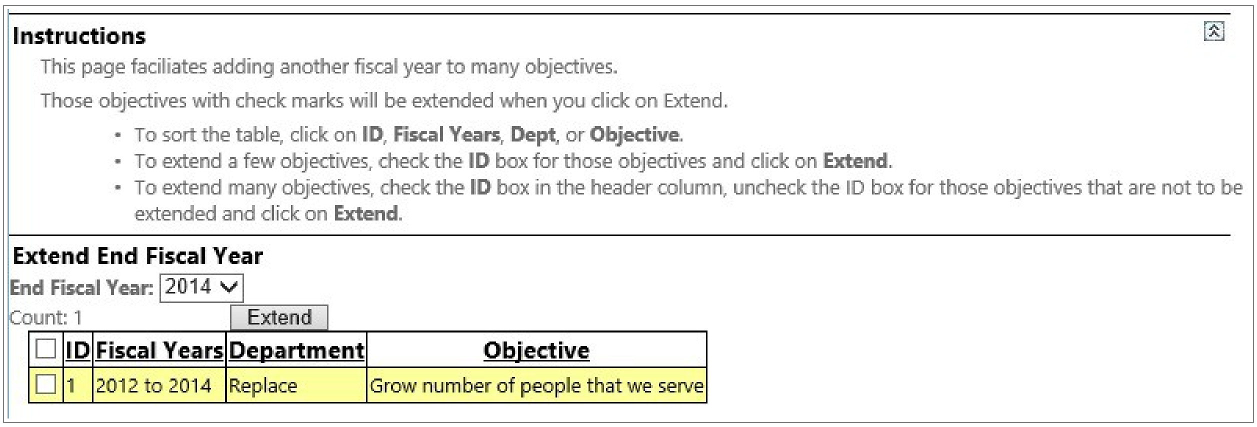
A.2.6 Extend multiple objectives' end fiscal year

This page allows you to change the end fiscal year of one or more objectives at a time. Changing the end fiscal year here or with the Objective page will:

1. Change the end fiscal year.

2. Propagate the last fiscal year targets into the new fiscal year.

To change the end fiscal year for multiple objectives, click on **Admin**…in the menu and then click **Extend End FY**.



Instructions

This page faciliates adding another fiscal year to many objectives.

Those objectives with check marks will be extended when you click on Extend.

- To sort the table, click on **ID**, **Fiscal Years**, **Dept**, or **Objective**.
- To extend a few objectives, check the **ID** box for those objectives and click on **Extend**.
- To extend many objectives, check the **ID** box in the header column, uncheck the ID box for those objectives that are not to be extended and click on **Extend**.

Extend End Fiscal Year

End Fiscal Year: 2014

Count: 1 Extend

☐	ID	Fiscal Years	Department	Objective
☐	1	2012 to 2014	Replace	Grow number of people that we serve

This page lists all of the objectives that have an ending fiscal year that matches the drop down selector.

During the final quarter of a fiscal year thru the initial quarter of the next fiscal year, this page indicates those objectives that can be extended into the next or current fiscal year respectively.

Click the check box in the column header to toggle the selection of all of the objectives.

Click individual objective's check box to toggle their selection.

Click the **Extend** to move the selected objectives into the next fiscal year.

A.3 Fixed reference tables

The following tables generally do not need to be changed.

A.3.1 Frequency

The Balanced Scorecard uses the frequency table when defining an objective. Frequency affects the number of measurements required for a fiscal year.

Editing of a frequency allows the changing the title or description. To manage these, click **Admin**…in the menu and then click **Frequency**.

Instructions

The table below lists the frequencies that are assigned to objectives.

- To sort the table, click on **ID**, **Objectives**, **Months**, **Alert Weeks**, **Title**, **Description**, **Changed**, or **By**.
- To edit a frequency, click on **Edit**, change values, and click on **Update**.
- To extract a spreadsheet of these values, click on **Excel Download**

Frequency

ID	Objectives	Title	Description	Changed	Alert Weeks	Changed	By	
A	Yes:1	Annual	Once per year	12	51	07/04/2013	Init	Edit
B	None	Bi-Annual	Twice per year	6	25	07/04/2013	Init	Edit
M	None	Monthly	12 times per year	1	3	07/04/2013	Init	Edit
Q	None	Quarterly	Four times per year	3	12	07/04/2013	Init	Edit

Excel Download

Frequency field descriptions

Field	Description
ID	Read-only value placed in objective to indicate frequency.
Objectives	Read-only link to a list of the objectives that uses this frequency.
Months	Number of months in the period.
Alert weeks	Weeks from start of period to start of alerts. Currently not used.
Title	Value shown in application to describe how often measurements are required.
Description	Full explanation of value. Currently not displayed elsewhere in the application.

A.3.2 Metric type

The Balanced Scorecard uses the metric type table when defining an objective. The metric type determines the kind of numeric value allowed and enforces the format of the targets and measurements for that objective.

If an objective is defined with a metric type that is inappropriate, you must delete, and re-add the objective with the correct metric type.

Metric types at this point are USA-centric. An appropriate mechanism should be added later. Of the components of this application where metric types appear include (1) a php class that manages the validation and comparison of targets, (2) database functions that evaluate the status of a measurement based on the targets, and (3) the this table that defines that ID field that links the (1) and (2).

Editing of a metric type allows the changing the title or description. To manage these, click **Admin**…in the menu and then click **Metric Type**.

Instructions

The table below lists the metrics that are assigned to objectives.

- To sort the table, click on **ID**, **Objectives**, **Title**, **Description**, **Changed**, or **By**.
- To edit a metric type, click on **Edit**, change values, and click on **Update**.
- To extract a spreadsheet of these values, click on **Excel Download**

Metric Types

ID	Objectives	Title	Description	Changed	By	
D	None	Completion Date	mm/dd/yyyy	07/04/2013	0Init	Edit
$	None	Dollar	$nn,nnn,nnn	07/04/2013	0Init	Edit
I	Yes:1	Integer	nn,nnn,nnn	07/04/2013	0Init	Edit
P	None	Percentage	nnn%	07/04/2013	0Init	Edit
R	None	Ratio	nn:nn	07/04/2013	0Init	Edit

Excel Download

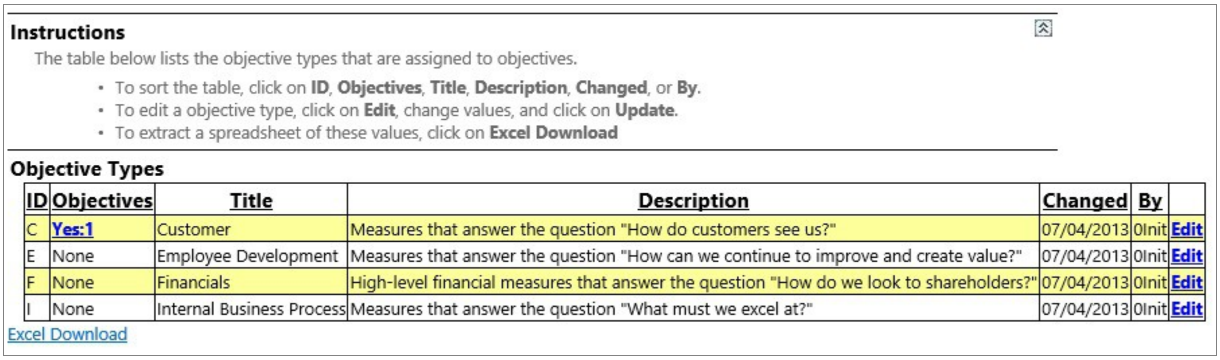
Metric type field descriptions

Field	Description
ID	Read-only value provided for assisting application debugging.
Objectives	Read-only link to a list of the objectives that uses this metric type.
Title	The metric type name displayed.
Description	Format of value to be entered for targets and measurements.
Delete	This column has a Delete link when the row is not referenced by any objective.

A.3.3 Objective type

The Balanced Scorecard uses the objective type table when defining an objective. Some pages list objectives by type. These types are expected to be fixed because they reflect the practice of defining objectives by the balance scorecard methodology.

Editing of a objective type allows the changing the title or description. To manage these, click **Admin**… in the menu and then click **Objective Type**.



Instructions

The table below lists the objective types that are assigned to objectives.

- To sort the table, click on **ID**, **Objectives**, **Title**, **Description**, **Changed**, or **By**.
- To edit a objective type, click on **Edit**, change values, and click on **Update**.
- To extract a spreadsheet of these values, click on **Excel Download**

Objective Types

ID	Objectives	Title	Description	Changed	By	
C	Yes:1	Customer	Measures that answer the question "How do customers see us?"	07/04/2013	0Init	Edit
E	None	Employee Development	Measures that answer the question "How can we continue to improve and create value?"	07/04/2013	0Init	Edit
F	None	Financials	High-level financial measures that answer the question "How do we look to shareholders?"	07/04/2013	0Init	Edit
I	None	Internal Business Process	Measures that answer the question "What must we excel at?"	07/04/2013	0Init	Edit

Excel Download

Objective type field descriptions

Field	Description
ID	Read-only value provided for assisting application debugging.
Objectives	Read-only link to a list of the objectives that uses this objective type.
Title	Objective type name.
Description	Full explanation of value. Currently not displayed elsewhere in the application.