



**Spider
Strategies**

Using Spider Impact™

**Spider Impact 4.0 User Guide
Updated February 7th, 2021**

Table of Contents

I.	Your success is important to us!	3
II.	Personal	4
	Home Section	4
	Bookmarks	9
III.	Importing Data	12
	Simple Value Imports (KPIs and Initiatives)	12
	Advanced Value Imports (KPIs and Initiatives)	17
	Transforming Values While Importing	30
	Importing Scorecard Items	35
	Managing Imports and Connections	39
IV.	Scorecards	42
	Overview of Scorecards	42
	Scorecard Building Basics	47
	KPI Scoring Types	57
	Calculated KPIs	67
	Exploring How a KPI is Calculated	88
	Linked Scorecard Items	96
	Editing Multiple Scorecard Items at Once	98
V.	Dashboards	103
	Building Dashboards	103
	Widget Spacing, Alignment, and Sizing	115
	Dashboard and Strategy Map Backgrounds	122
	Chart Widgets	134
	Image Widgets	138
	Text Widgets	143
	Report Widgets	146
	Notes Widgets	150
	Embedded Content Widgets	153
VI.	Charts & Reports	159

Overview of Reports	159
Prebuilt Scorecard Reports	165
Report Writer	183
Initiatives Report	197
Chart Writer	202
Customizing Charts	205
SQL Reports	216
VII. Other Sections	218
Overview of Initiatives	218
Strategy Maps	223
Overview of Alerts	228
Briefings	233
VIII. Exporting and Sharing	243
Exporting KPI Value Import File	243
Exporting Scorecard Import File	247
IX. Application Administration	249
Choosing Methodology	249
Users	251
Groups	258

Your success is important to us!

Spider Impact is industry-leading performance management software that powers data visualization, balanced scorecards, team alignment, and KPI and initiative management. This comprehensive guide explains how to use the software, including some of the more advanced functionality.

Although we're providing this information here as a single user guide, it's much better when referenced online. You can see every cross-referenced article in its most up-to-date form at support.spiderstrategies.com.

To help you discover everything Spider Impact has to offer, we also have free training videos on our website, and we've put together several "what is" guides to explain some of the more popular performance management methodologies. We even host free monthly webinars to walk you through new features and best practices.

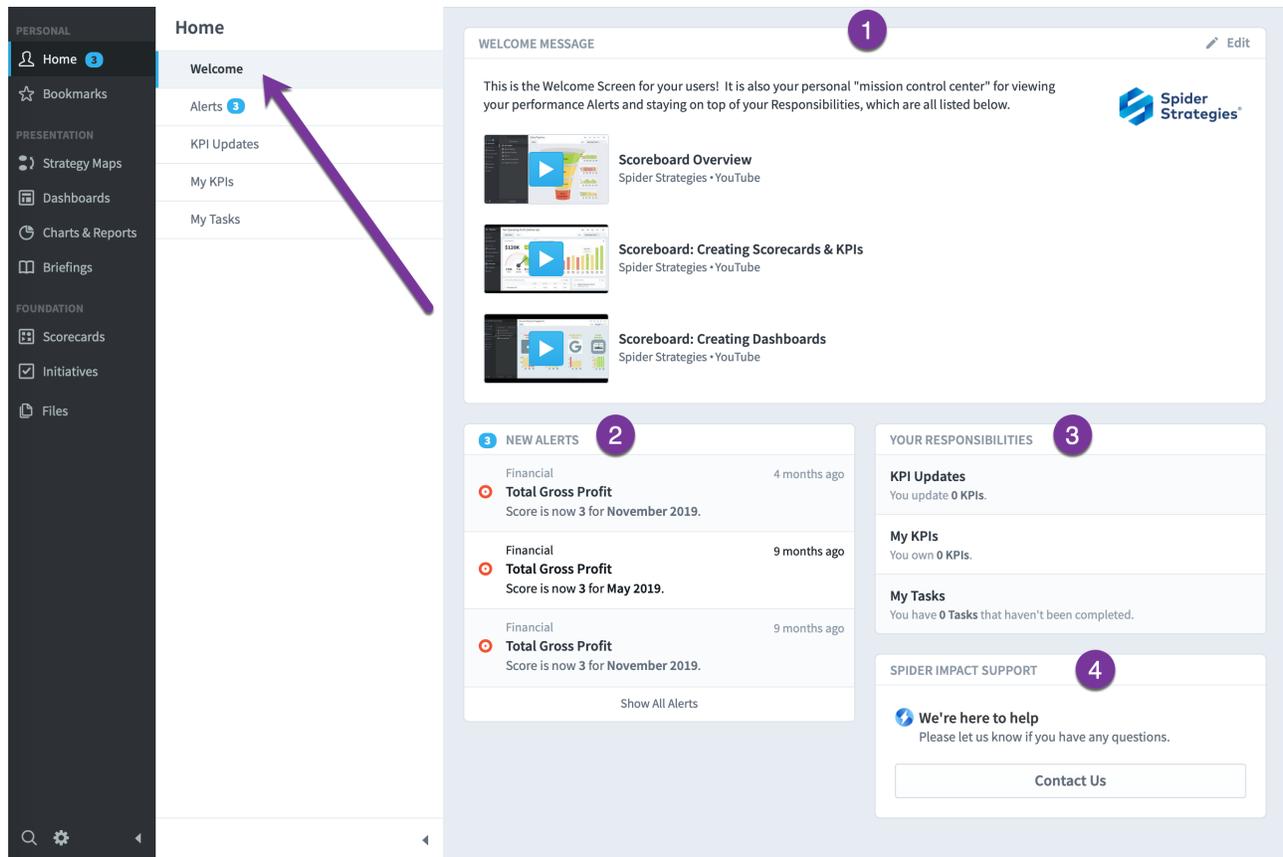
If you want to maximize your return on investment, we offer paid formal training courses and dedicated consulting engagements. Most of our customers prefer the flexibility of contracting for remote (web-based) assistance, but we also have on-site services available if they're a better match for your requirements.

Personal

Home Section

Welcome

When you first log into Spider Impact you see the Welcome screen in the Home section.



This gives you a quick overview of your most important information.

1. The welcome message can be edited by an administrator and can contain a logo and videos.
2. You'll see your most recent alerts here. There's also a link that takes you to the alerts page that we discuss next.
3. You can see the number of KPIs you own and update, as well as any tasks that are assigned to you. Clicking on one of these rows will take you to that

page described below.

4. This help link defaults to sending requests to Spider Strategies, but administrators can change it to send help requests to any email.

Alerts

The Alerts section shows you all of the alerts you've received.

The screenshot displays a dashboard interface. On the left is a dark sidebar with a navigation menu. The 'Alerts' link is highlighted in blue and has a notification badge with the number '3'. A purple arrow points from this link towards the main content area. The main content area is titled 'Home' and contains a list of navigation items: 'Welcome', 'Alerts 3', 'KPI Updates', 'My KPIs', and 'My Tasks'. To the right of the sidebar is a large panel titled 'ALERTS' with an 'Edit Subscriptions' link. Below this is a 'NEW ALERTS' section with three entries, each showing 'Total Gross Profit' and a score update. At the bottom is an 'ALERT HISTORY' section with a 'Clear history' link and the text 'No Alerts in History'.

KPI Updates

On the KPI Updates page you can update all of the KPIs that you have been assigned to as an Updater.

The screenshot shows the 'KPI Updates' page in Spider Impact. The left sidebar is expanded to show 'KPI Updates' selected. The main content area displays a table of financial KPIs for February 2020. The table has columns for KPI, Period, Actual, and Thresholds. A purple arrow points to the 'KPI Updates' menu item. The table data is as follows:

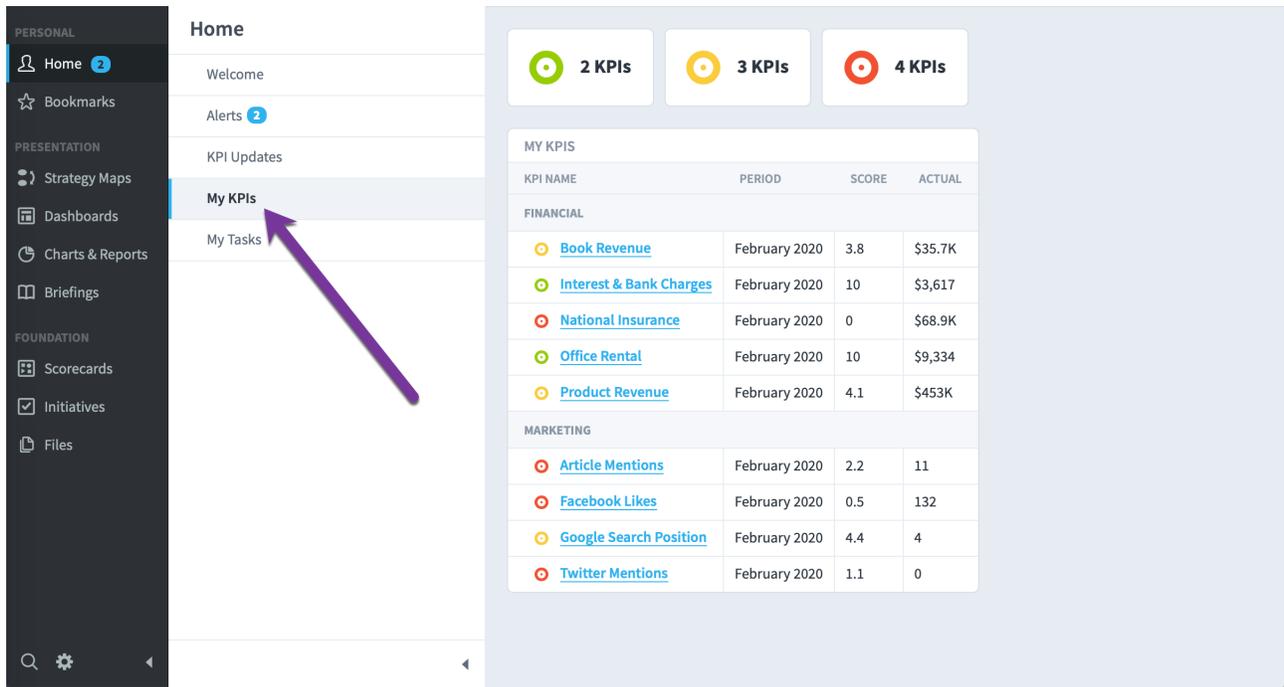
KPI	PERIOD	ACTUAL	THRESHOLDS
Product Revenue	February 2020	453,450 \$	450,000 \$ 465,000 \$
Book Revenue	February 2020	35,650 \$	35,000 \$ 40,000 \$
Product Costs	February 2020	274,981 \$	275,834 \$ 275,000 \$
Training Venue Costs	February 2020	38,572 \$	39,584 \$ 38,750 \$
Book Production Costs	February 2020	8,279 \$	8,334 \$ 7,500 \$
Total Gross Profit	February 2020	448,574 \$	422,250 \$ 432,917 \$

There are a few extra controls on this page to make it easier to update large numbers of KPIs.

1. The filter control allows you to filter by organization as well as KPI calendar period.
2. You can upload a spreadsheet with KPI values rather than typing in the values by hand.

My KPIs

This shows you all of the KPIs that you have been assigned to as an Owner.



On the top of the page is a summary of how many KPIs you have of each color. You can click on each summary box to only show KPIs of that color.

My Tasks

My Tasks is similar to My KPIs, except it shows you all of the tasks from the Initiatives section that you're an owner of.

PERSONAL

- Home **2**
- Bookmarks

PRESENTATION

- Strategy Maps
- Dashboards
- Charts & Reports
- Briefings

FOUNDATION

- Scorecards
- Initiatives
- Files

Home

Welcome

Alerts **2**

KPI Updates

My KPIs

My Tasks



1 Task

1 Task

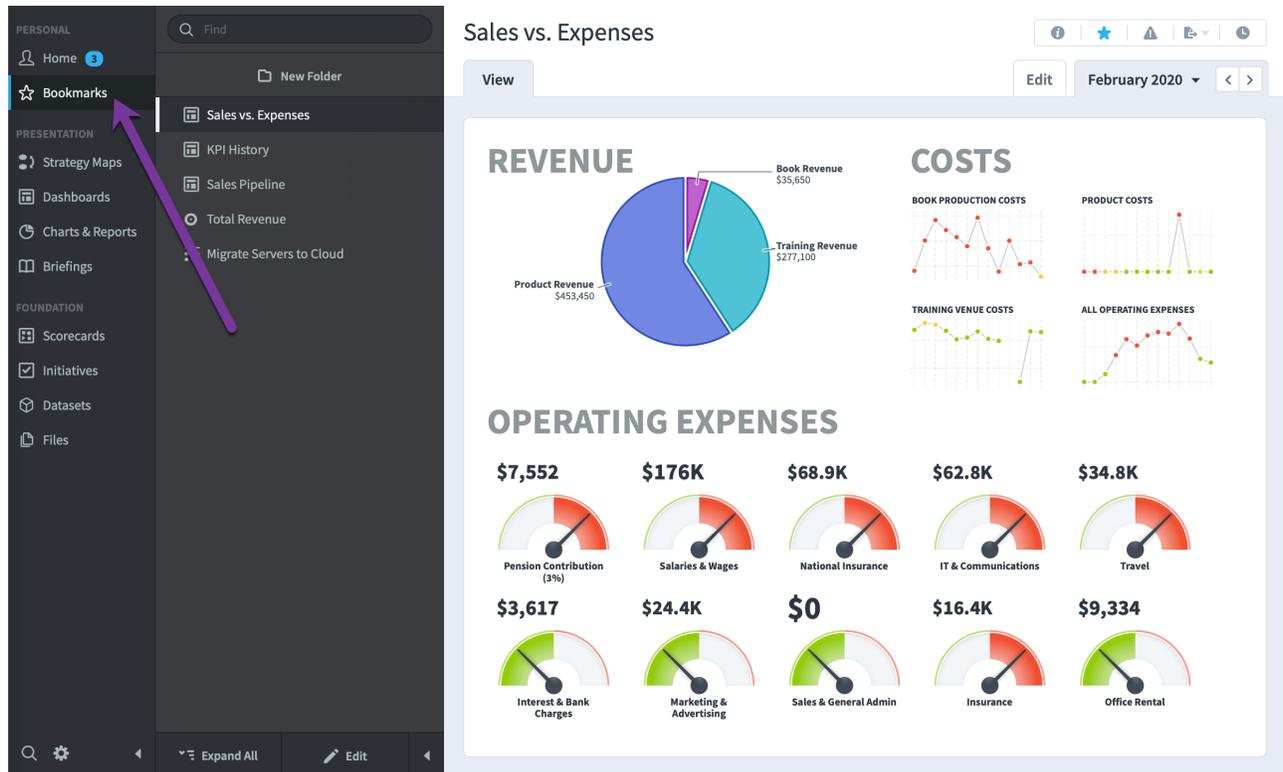
MY TASKS

TASK NAME	START DATE	END DATE	% COMPLETE	BUDGET SPENT	TOTAL BUDGET
MOBILEWORLD INC.					
Build a SEO Capability	Jan 1, 2019	Apr 30, 2020	76%	\$232K	\$365K
Migrate Servers to Cloud	Jul 1, 2018	Dec 1, 2019	95%	\$140K	\$150K

Bookmarks

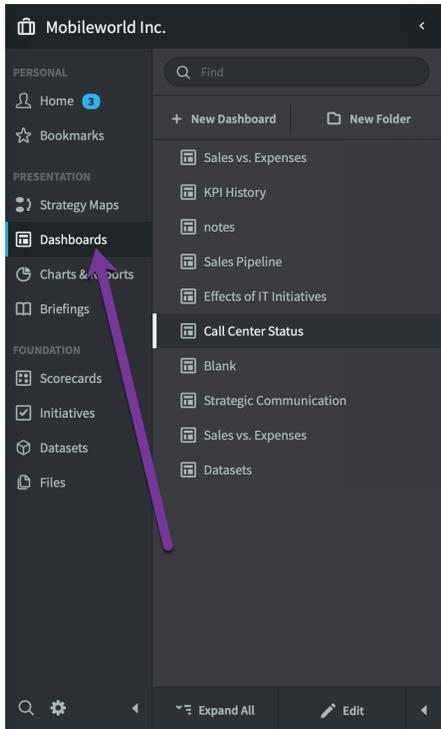
Overview

The Bookmarks section is where you organize links to your favorite screens for easy access. Every user's bookmarks are different, and many people are able to keep an eye on their organization's performance by just clicking through their bookmarks every week.

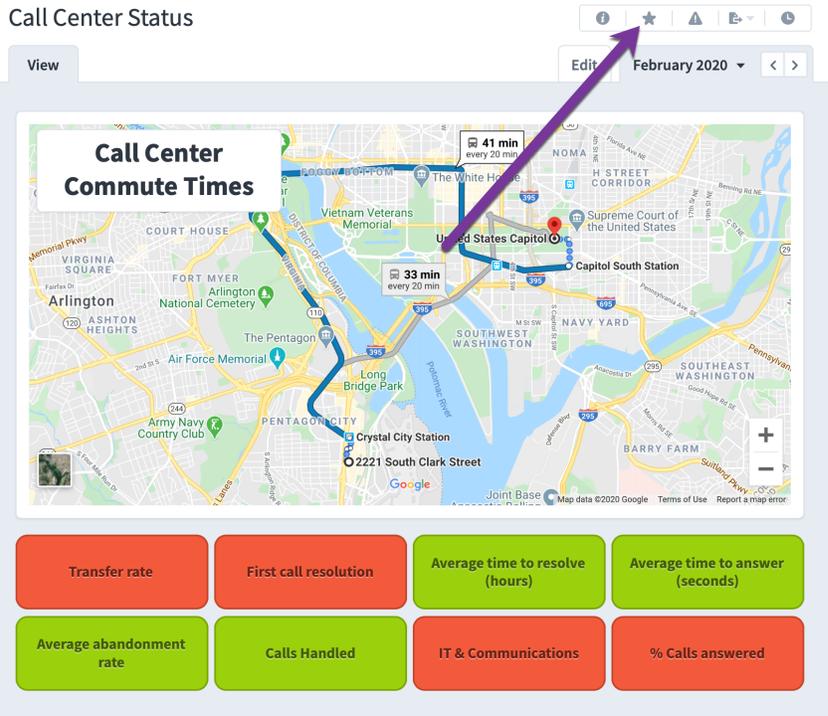


Adding a Bookmark

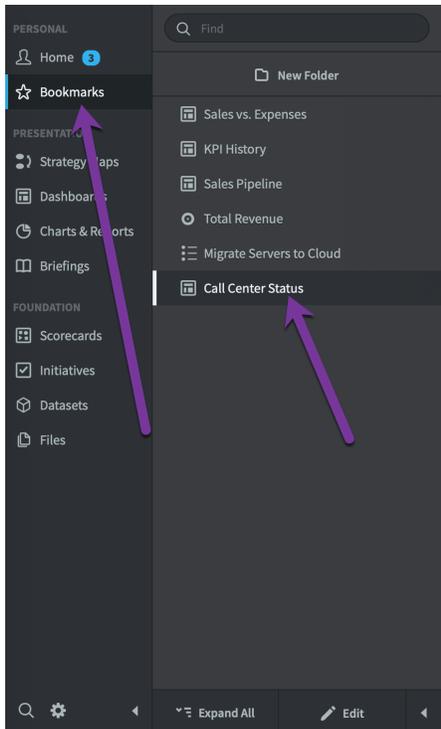
To create a bookmark, click on the star icon. In this example, we're looking at a dashboard in the Dashboards section.



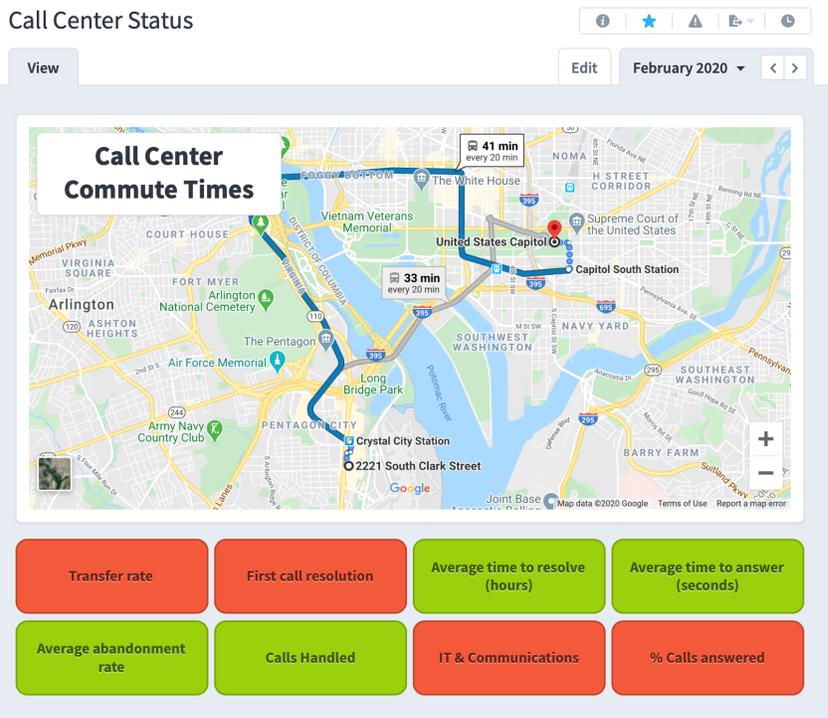
Call Center Status



We now see that dashboard in the Bookmarks section.

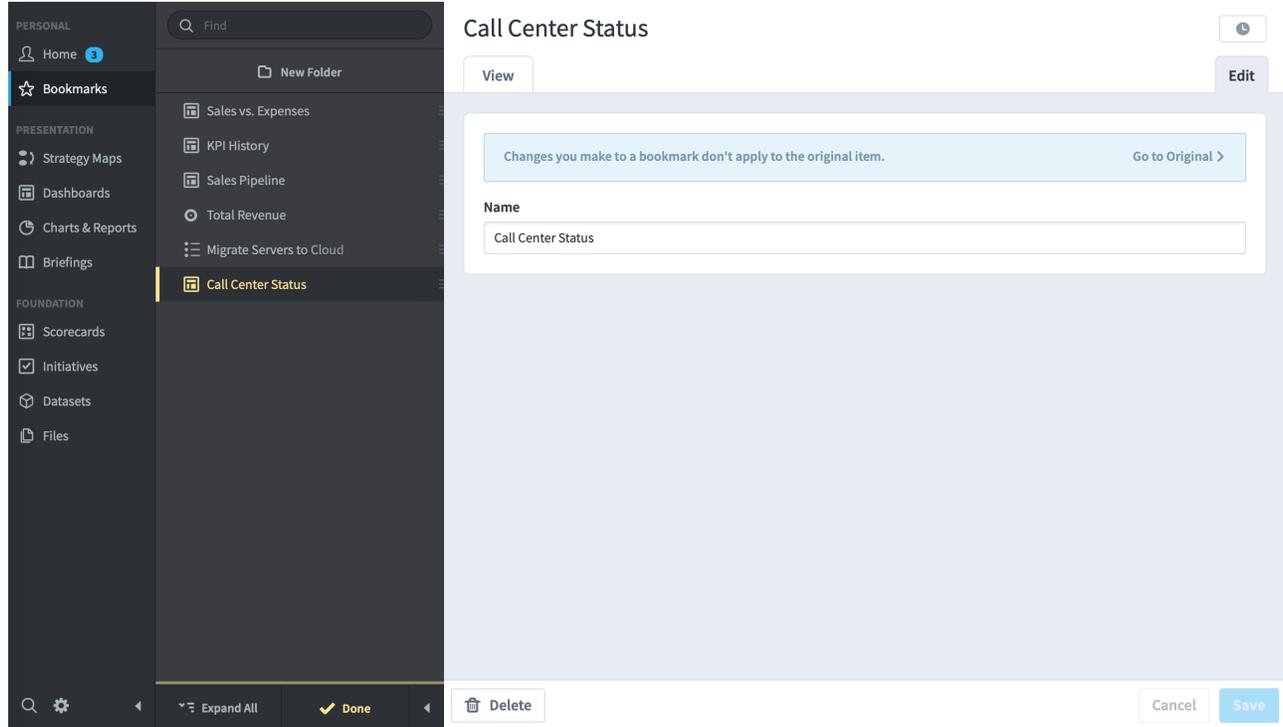


Call Center Status



Editing Bookmarks

You can rename, reorder, or remove a bookmark by clicking on the Edit tab in the bookmarks section.



Importing Data

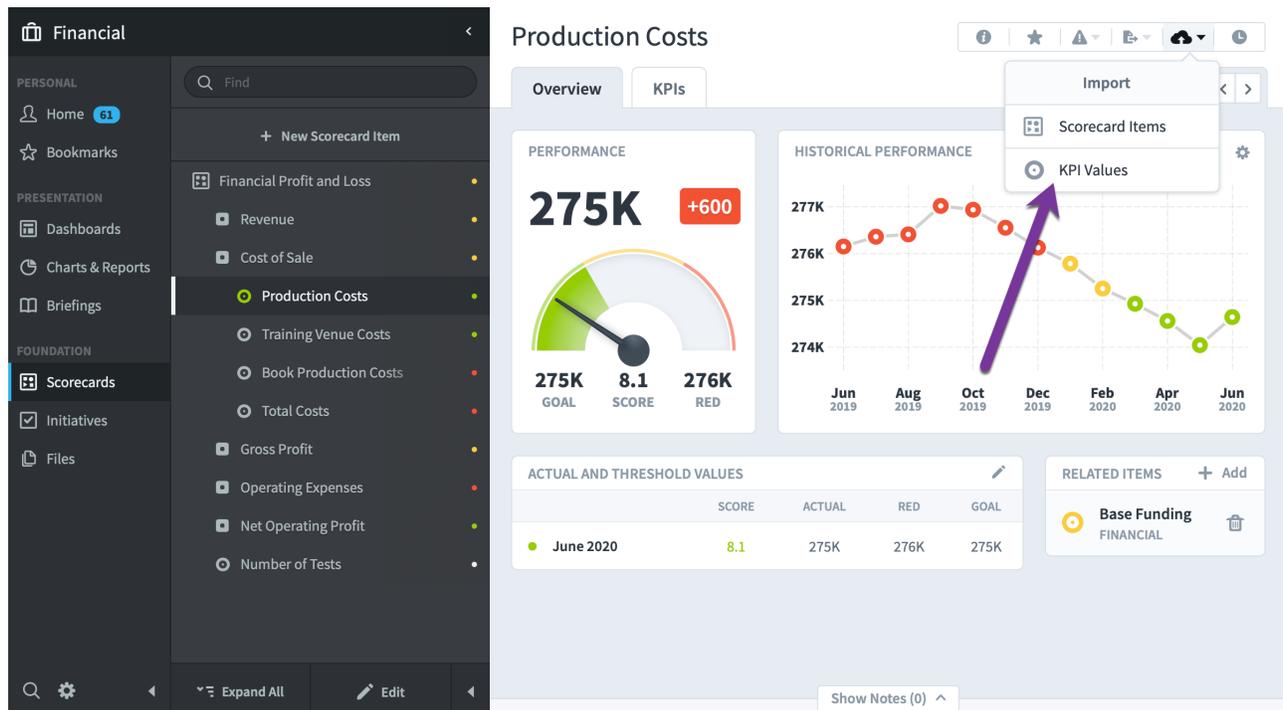
Simple Value Imports (KPIs and Initiatives)

Overview

This article covers how to create a new KPI or Initiative value import, as well as how to import data that is already in a specific format. Please see the [Advanced Value Imports \(KPIs and Initiatives\)](#) article for how to import data in more advanced formats.

Starting a new Import

You can import KPI and Initiative values directly inside of Spider Impact. Anywhere you manually update data, there is the ability to import data as well. For example, on every tab in the Scorecards section there's an import menu with a KPI values option



The Initiatives section has a similar button for importing initiative status.

Migrate Servers to Cloud

Risk: Customer data leakage, corruption, or unavailability. [More....](#)

Total Budget
\$150K

Budget Remaining
\$10K

Start Date
Jul 1, 2018 ⚠️

Due Date
Dec 1, 2019 ⚠️

% Time Elapsed
100%

PROJECTED SCHEDULE ⚠️
31
21 days late
Projected End Date: Dec 22, 2019

PROJECTED COST ✅
1.7% under budget
Projected Cost: \$148K
Projected Variance: \$2,500 under budget

HISTORICAL PERFORMANCE [Graph](#) [Status Updates](#) [Add Status Update](#)

\$150K **100%**

Show Notes (0) ^

There's even an import button when updating KPI values in the Home section.

Home

Welcome

Alerts 5

KPI Updates

My KPIs

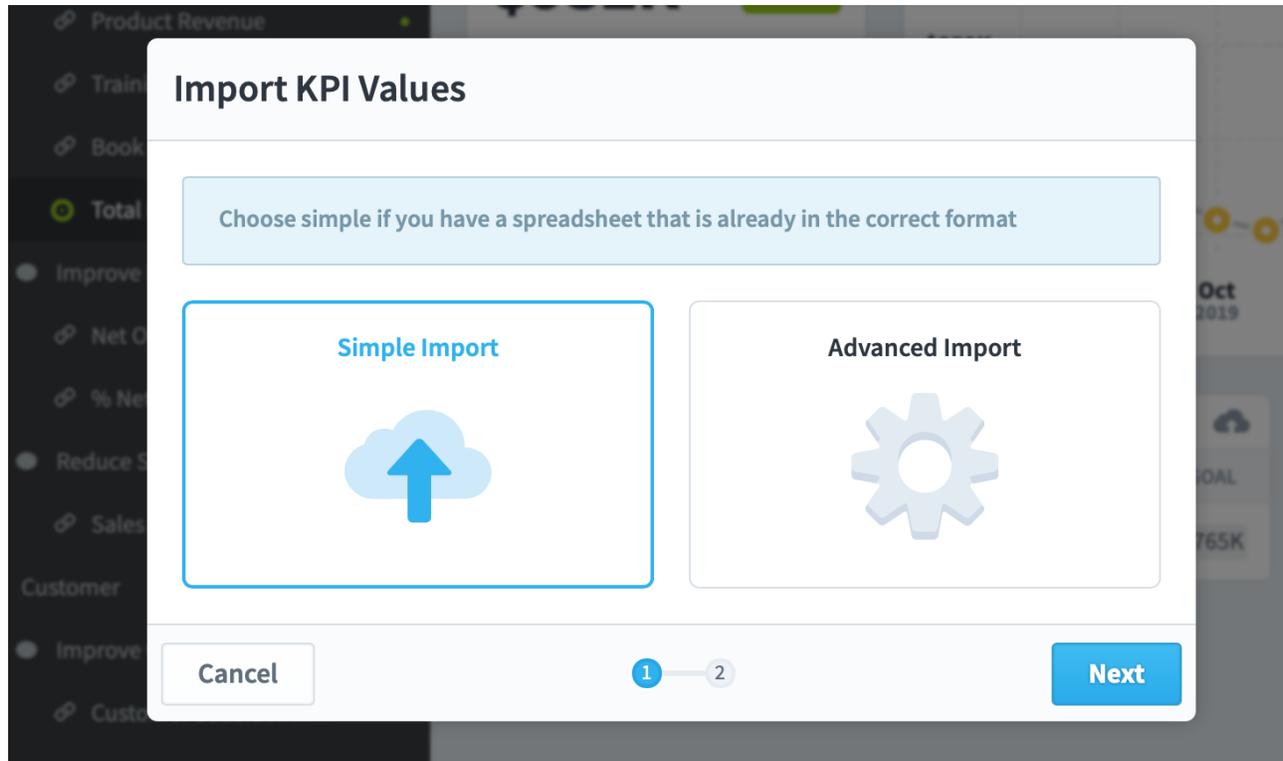
My Tasks

KPI UPDATES June 2020 [Import KPI Values](#)

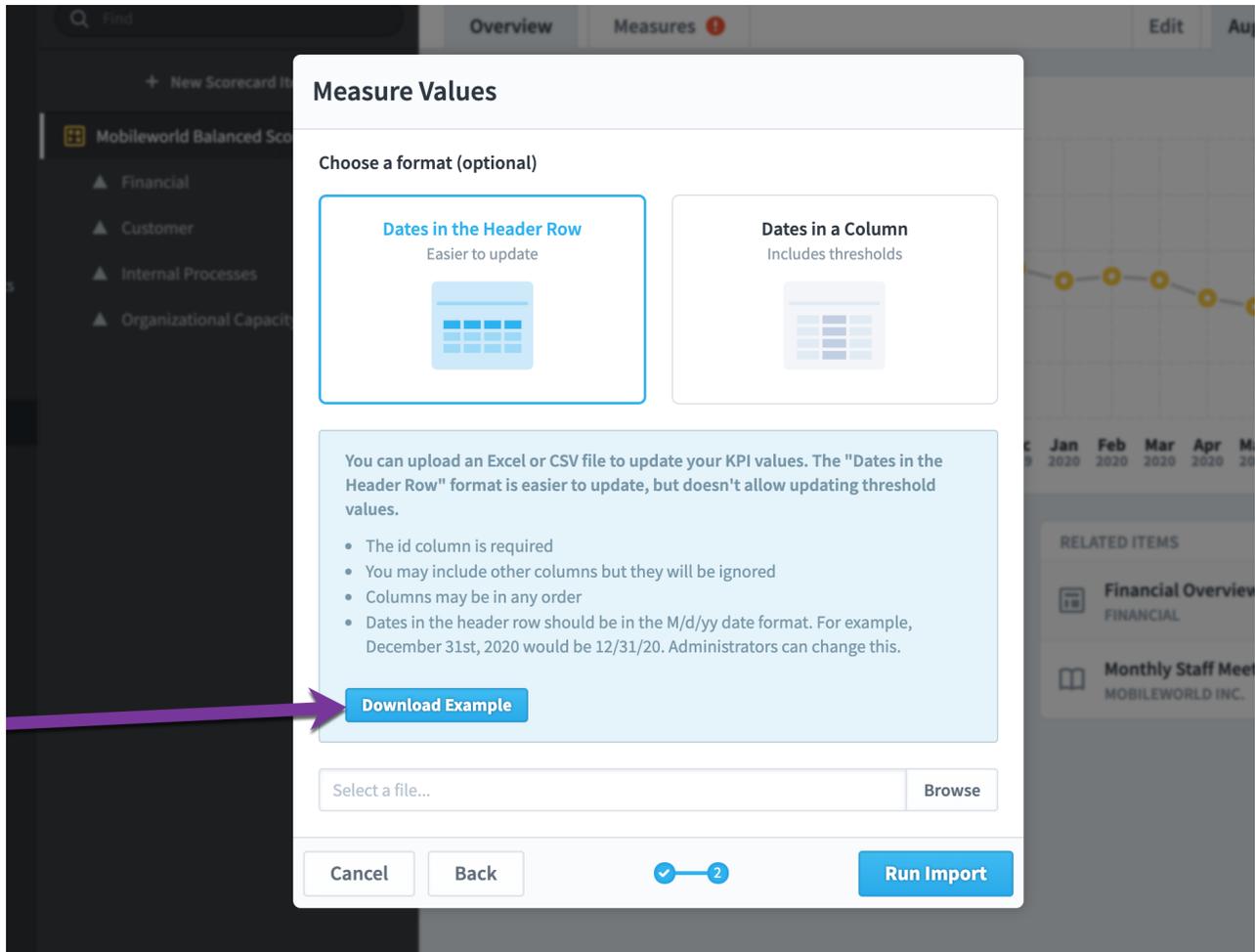
KPI	PERIOD	ACTUAL	TH
FINANCIAL			
Product Revenue	June 2020	622,250 \$	450,000 \$ 465,000 \$
Book Revenue	June 2020	39,100 \$	35,000 \$ 40,000 \$
Product Costs	June 2020	274,531 \$	275,834 \$ 275,000 \$
Training Venue Costs	June 2020	39,639 \$	39,584 \$ 38,750 \$
Book Production Costs	June 2020	8,545 \$	8,334 \$ 7,500 \$
Total Gross Profit	June 2020	436,627 \$	422,250 \$ 432,917 \$

Simple Imports

When importing KPI and Initiative values, the default option is Simple Import.



Simple import is by far the easiest option and is great when you have data that's already in a supported format. Your spreadsheet can have dates in either the header row or in a column, and there are example files that you can download to show you exactly what the app is looking for.



Finally, Spider Impact can easily export your existing KPI data in exactly this format so you can import it to another organization, or modify your data to be re-imported. This is covered in the [Exporting KPI Value Import File](#) article.

With just a couple clicks you can import data and be on your way.

KPI Values

Choose a format (optional)

Dates in the Header Row
Easier to update

Dates in a Column
Includes thresholds

You can upload an Excel or CSV file to update your KPI values. The "Dates in the Header Row" format is easier to update, but doesn't allow updating threshold values.

- The id column is required
- You may include other columns but they will be ignored
- Columns may be in any order
- Dates in the header row should be in the M/d/yy date format. For example, December 31st, 2020 would be 12/31/20. Administrators can change this.

[Download Example](#)

Select a file...

2

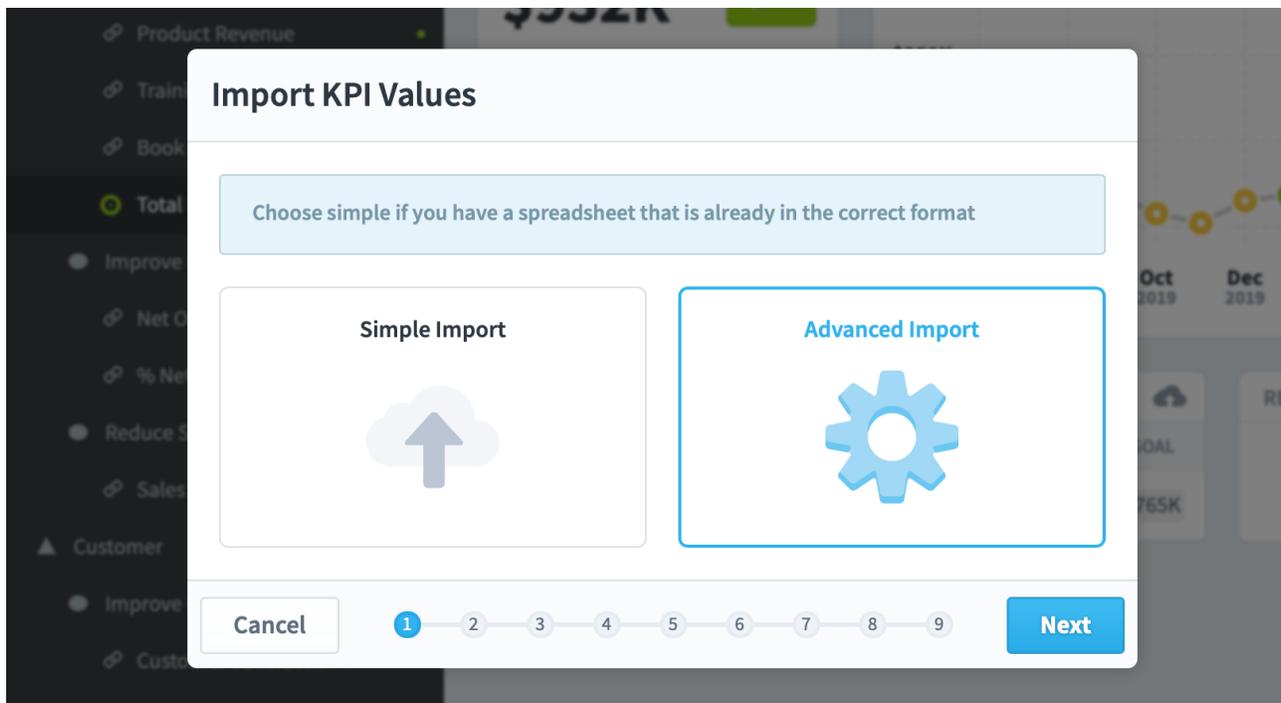
Advanced Value Imports (KPIs and Initiatives)

Overview

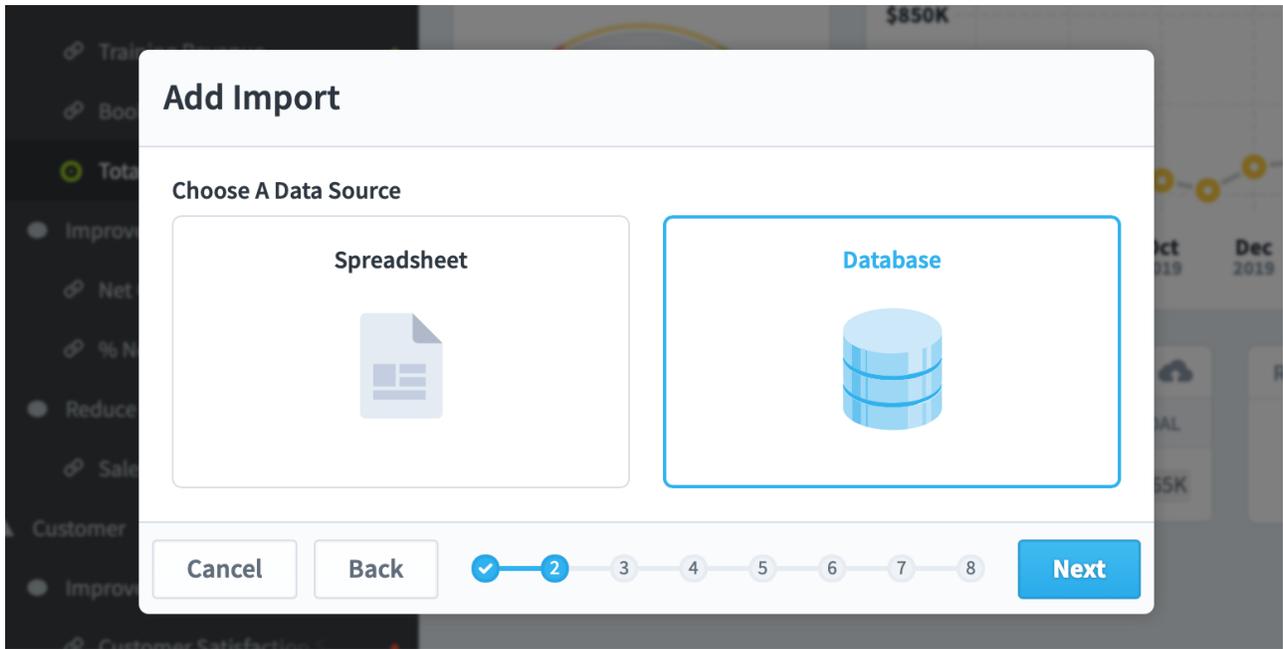
This article covers all of the advanced functionality for importing KPI and Initiative values. For information about how to start an import, or how to easily import values that are already in a specific format, please see the [Simple Value Imports \(KPIs and Initiatives\)](#) article.

Data Source

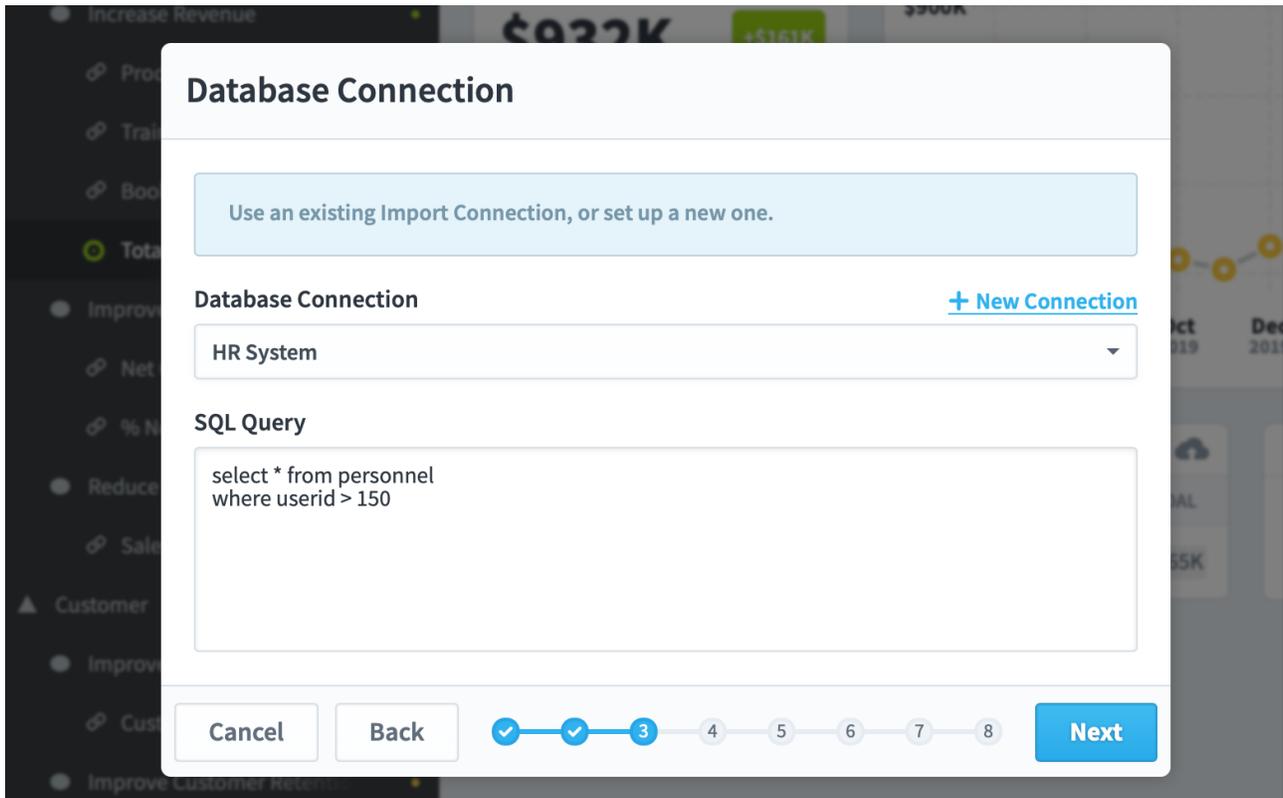
The first step when importing KPI or Initiative values is to choose what type of import you want. When you want more powerful data import options, choose Advanced Import. This turns your value import into a 9-step wizard with full export, transform, and load (ETL) capabilities.



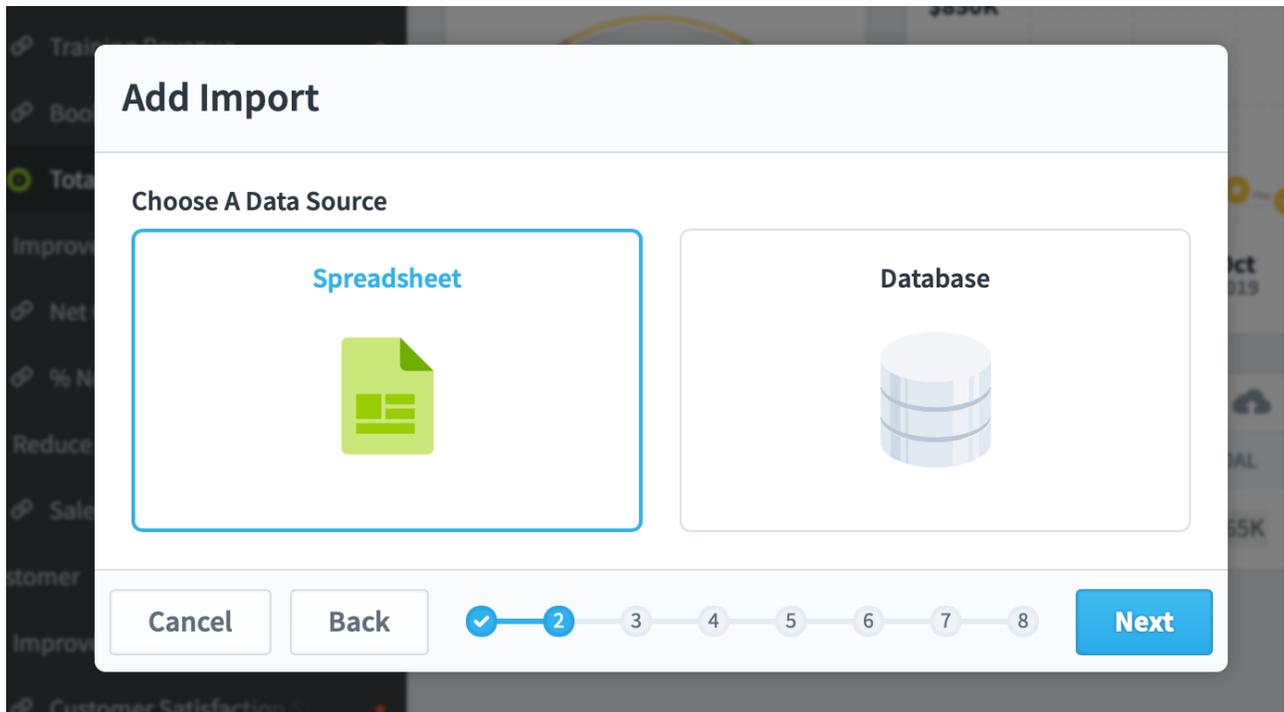
The first thing you'll need to do is choose a data source. For example, you can choose Database...



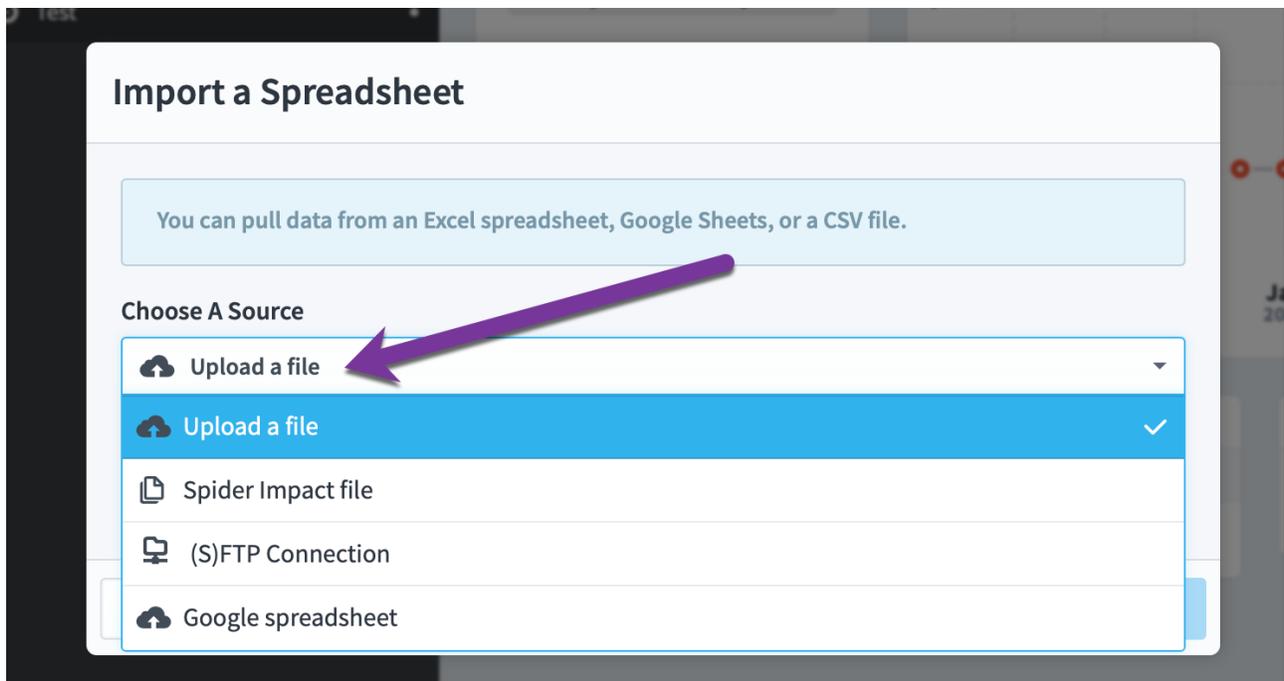
... and write a SQL query.



Or you can choose Spreadsheet...



... pick one of several ways to get the spreadsheet into Spider Impact...



... and then do any last-minute cleanup. In this example we're importing from an Excel spreadsheet, so we can choose a worksheet on top. Many spreadsheets have

header data that you don't want to import in the first few rows, for example column labels or a spreadsheet title. If one of these rows contains your column labels, be sure to flip the switch on that row. You can also use the Ignore checkboxes to hide irrelevant data.

Select Worksheet and Header Row

This step allows you to choose what to import. Select the header row for your data, if there is one. All rows above the selected header row will be ignored.

Worksheet
scoreboard_Values

EXAMPLE DATA FROM THE SPREADSHEET

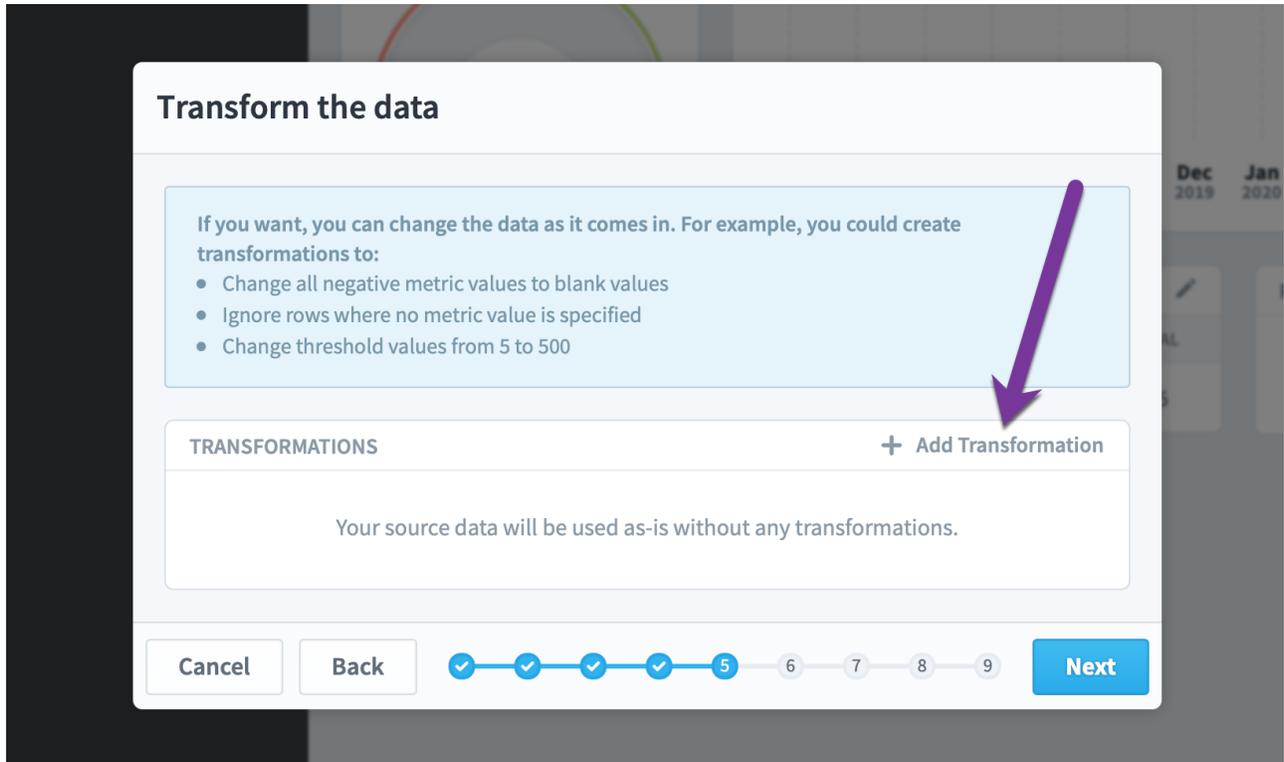
HEADER ROW	IGNORE	A	B	C	D	E
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Metric	Value	Threshold 1	Threshold 1	Date
<input type="checkbox"/>	<input type="checkbox"/>	test_metric_1 (2 Color)	15,491	15,491	15,491	Oct 3, 2016
<input type="checkbox"/>	<input type="checkbox"/>	test_metric_2 (4 Color Scored Middle)	3,181,124.4	3,181,124.4	3,181,124.4	May 18, 2019
<input type="checkbox"/>	<input type="checkbox"/>	test_metric_3 (4 Color Orange)	18,607	18,607	18,607	Jul 7, 2017
<input type="checkbox"/>	<input type="checkbox"/>	test_metric_4 (Unscored)	1	1	1	Mar 26, 2019
<input type="checkbox"/>	<input type="checkbox"/>	test_metric_5 (2 Color)	114,281.6	114,281.6	114,281.6	Nov 13, 2017
<input type="checkbox"/>	<input type="checkbox"/>	test_metric_6 (2 Color Stabilize)	0	0	0	Dec 4, 2017
<input type="checkbox"/>	<input type="checkbox"/>	test_metric_7 (2 Color Stabilize)	6,087.1	6,087.1	6,087.1	Apr 28, 2016

[Show All Rows](#) (May take several minutes)

Cancel Back 1 2 3 4 5 6 7 8 9 Next

Transforming Data

Next is the optional transformation stage. If you want to import your data as-is, just click next. If you want to change your data before it's imported, however, click Add Transformation. This is covered more in-depth in the [Transforming Values While Importing](#) article.



Identifying Fields in Import Data

At this point, it doesn't matter where your data is coming from, it all looks the same. Now you'll need to tell the software where to find the data you want to import. To do this, just drag and drop the column labels onto the top of each column. If your columns are named something that Spider Impact recognizes, we'll do this for you automatically.

Source Data

Date Reference

Dates are in a column Overwrite Existing Values

Your source data is below. In this step, you'll need to tell us which columns have the data you want to import. We've done our best to identify the correct columns, but you may need to drag and drop some of the labels into the right places. Please see our [Importing KPI and Initiative Values](#) support article for advanced tips and tricks.

Available Column Labels

KPI Id/Name (2) Threshold Note

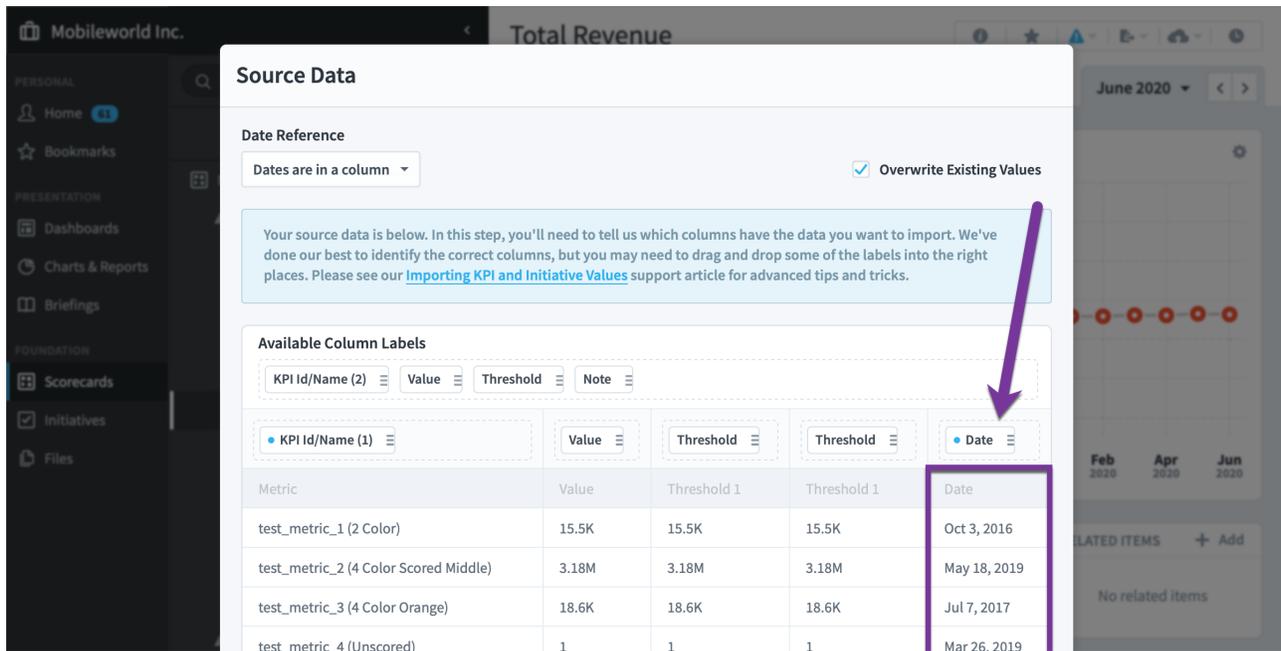
Value Date

Drag & Drop Labels Here Threshold Threshold Date

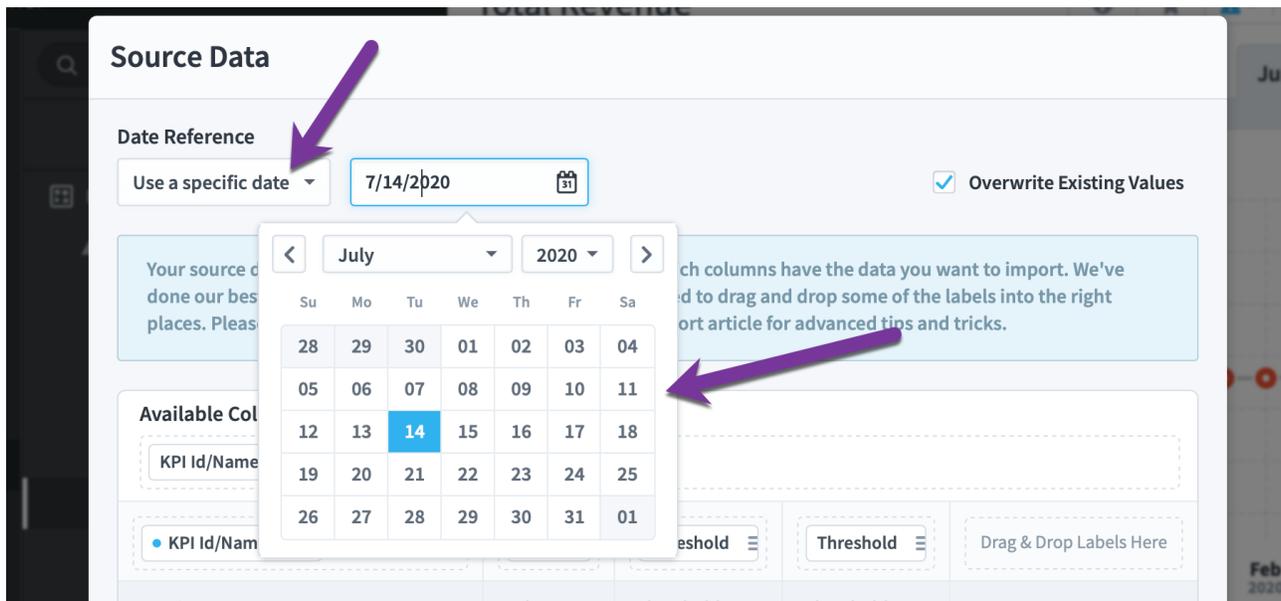
Metric	Value	Threshold 1	Threshold 1	Date
test_metric_1 (2 Color)	15.5K	15.5K	15.5K	Oct 3, 2016
test_metric_2 (4 Color Scored Middle)	3.18M	3.18M	3.18M	May 18, 2019
test_metric_3 (4 Color Orange)	18.6K	18.6K	18.6K	Jul 7, 2017
test_metric_4 (Unscored)	1	1	1	Mar 26, 2019
test_metric_5 (2 Color)	114K	114K	114K	Nov 13, 2017
test_metric_6 (2 Color Stabilize)	0	0	0	Dec 4, 2017
test_metric_7 (2 Color Stabilize)	6.087	6.087	6.087	Apr 28, 2016

Cancel Back 1 2 3 4 5 6 7 8 9 Next

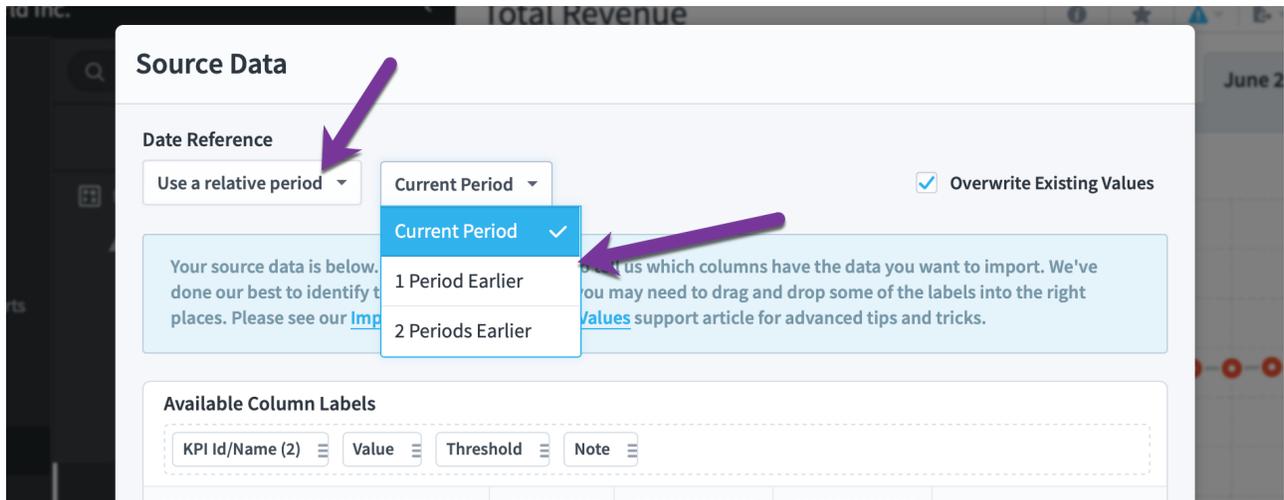
One of the things you'll need to tell the software is where to find the dates for the values. In this example we've chosen "dates are in a column" and we've matched the Date label with the date column.



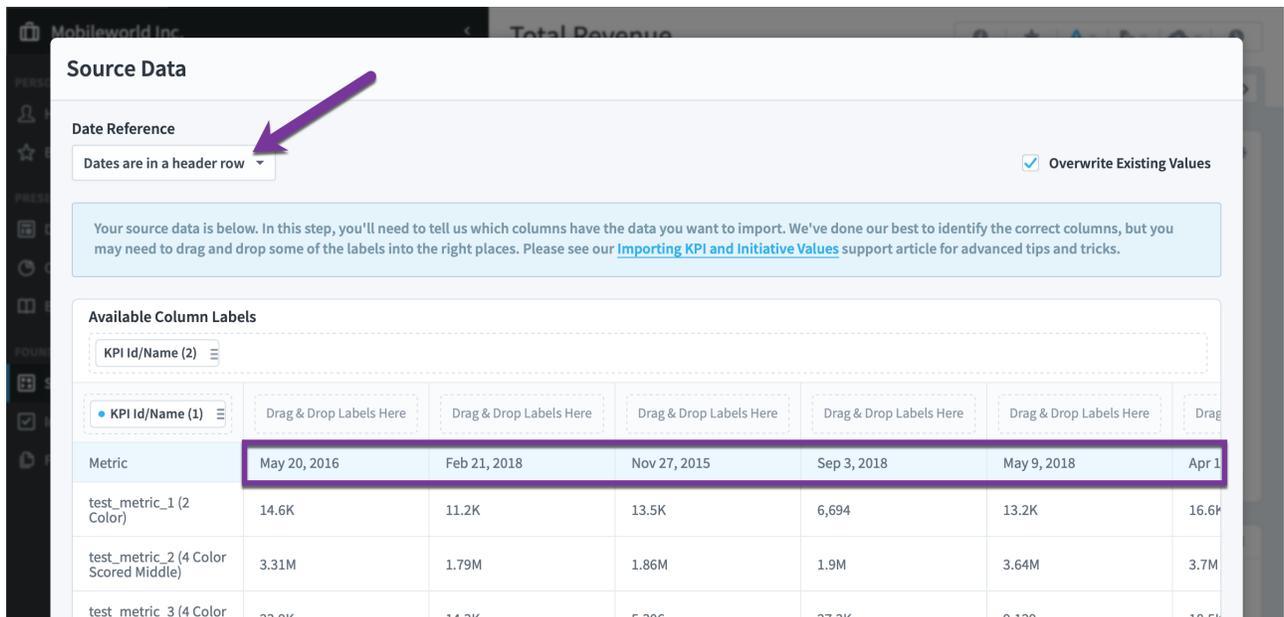
You can also choose a specific date for all of the values you're importing.



You can even choose a relative period. In this example we're importing KPI values into the current period.

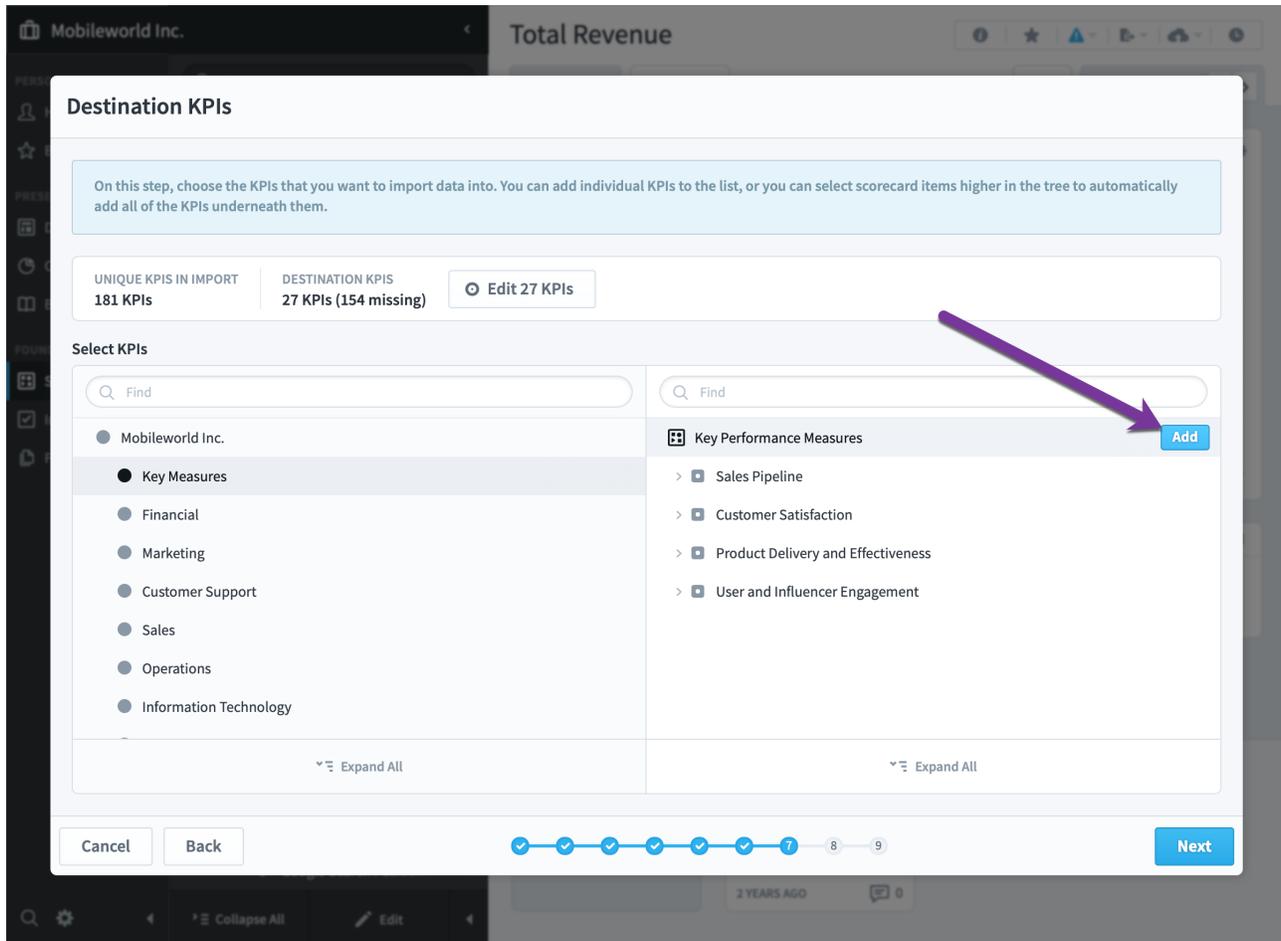


Finally, for KPI values you can choose "dates are in a header row." This allows you to import multiple values for each KPI row.

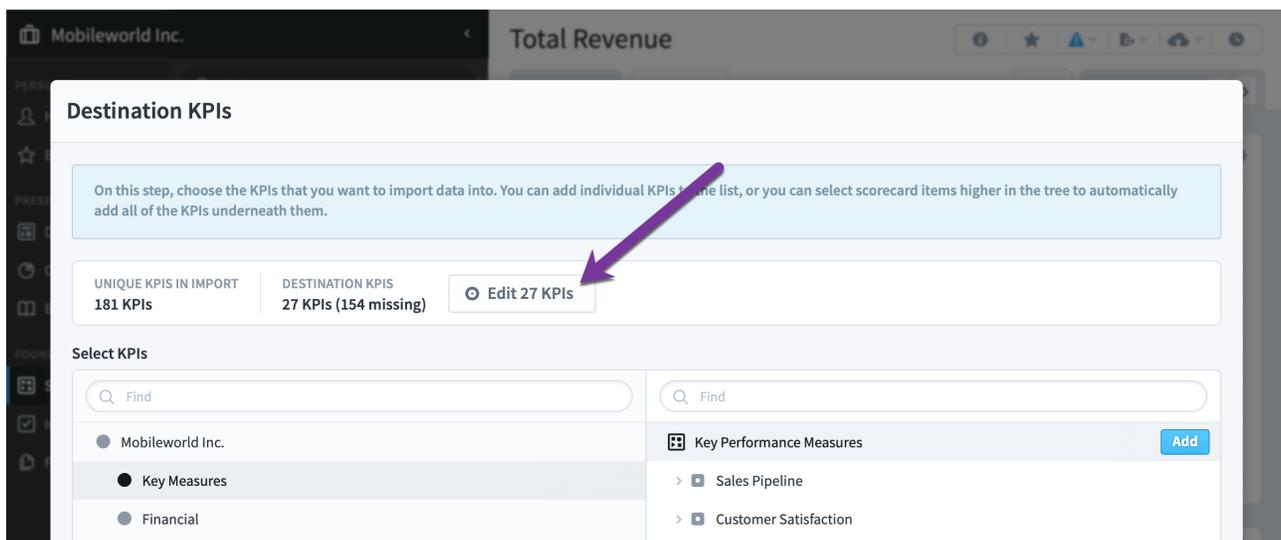


Identifying Destination KPIs

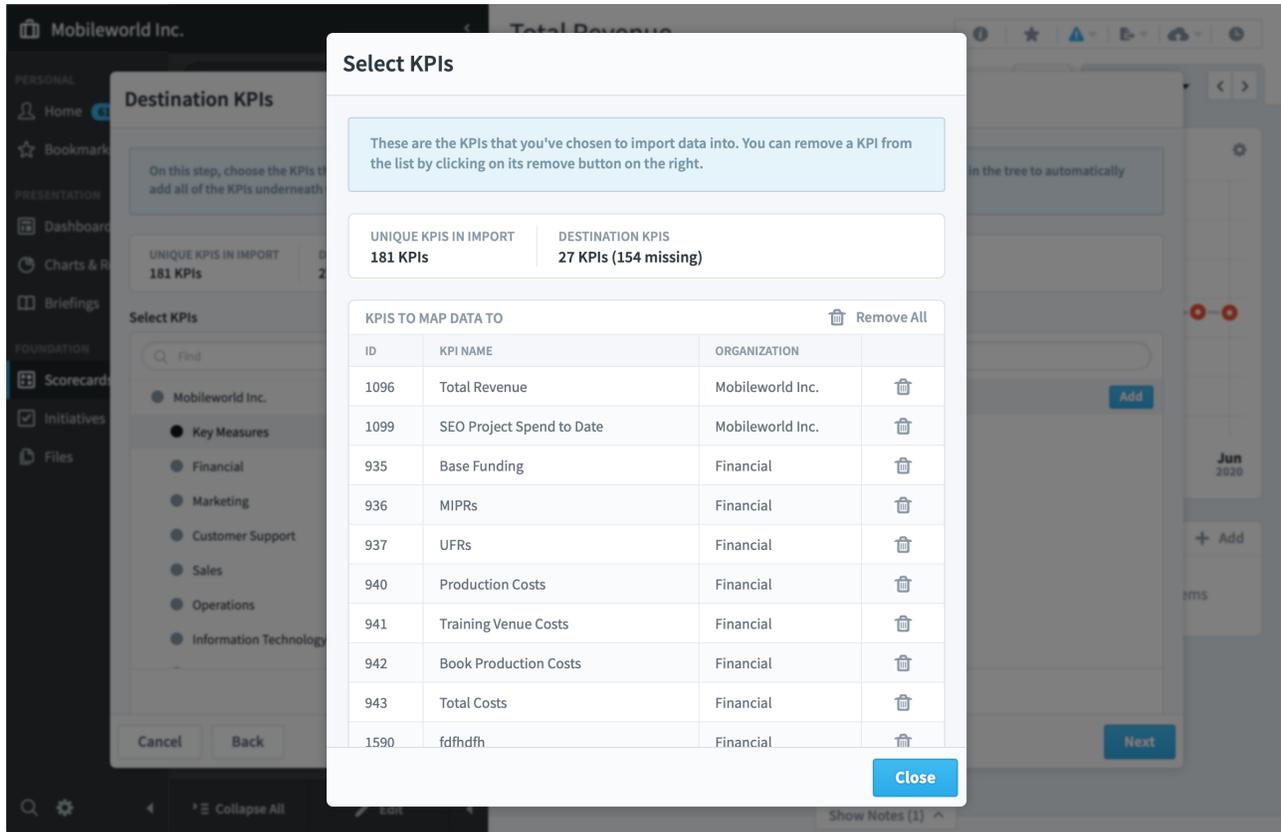
After you've chosen what data you want to import, the next step is choosing where you want that data to go. Just choose the items you want to import data into, or choose an item higher in the tree to select every KPI or Initiative below it.



To see the items that you've already selected, just click the Edit KPIs button.

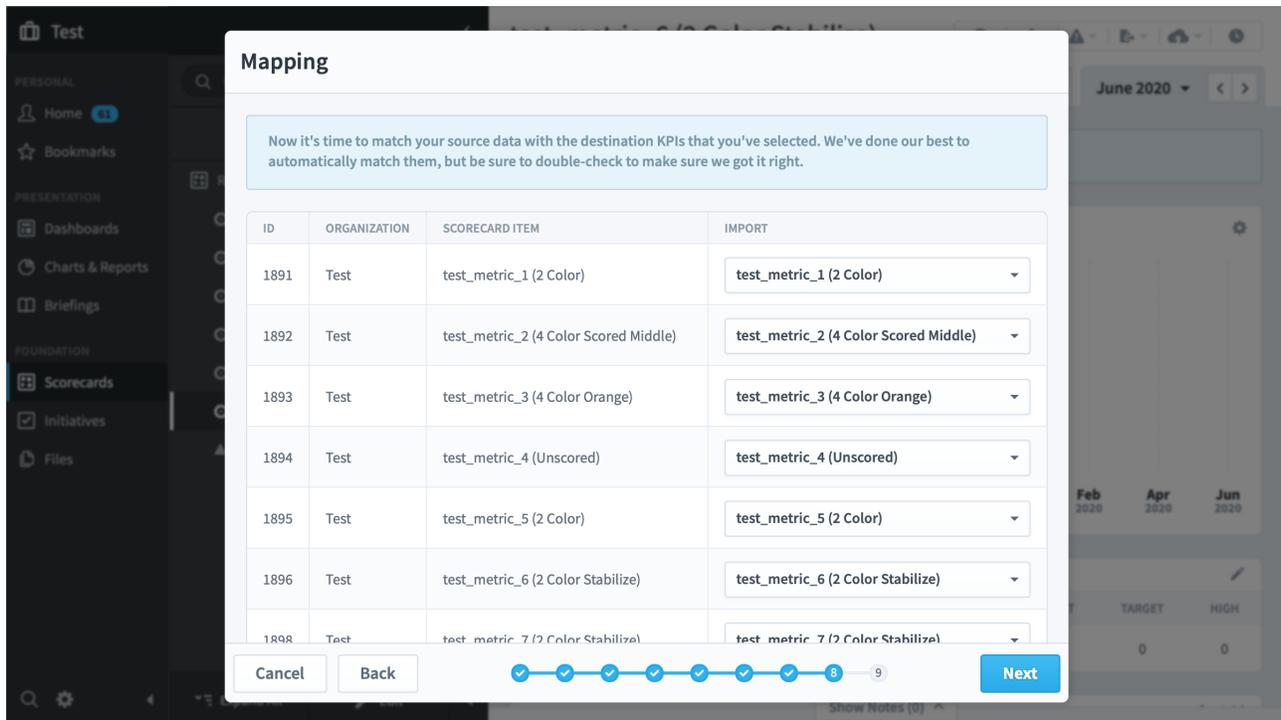


This will open a second-level dialog where you can view and remove the KPIs that you've selected to import data into.



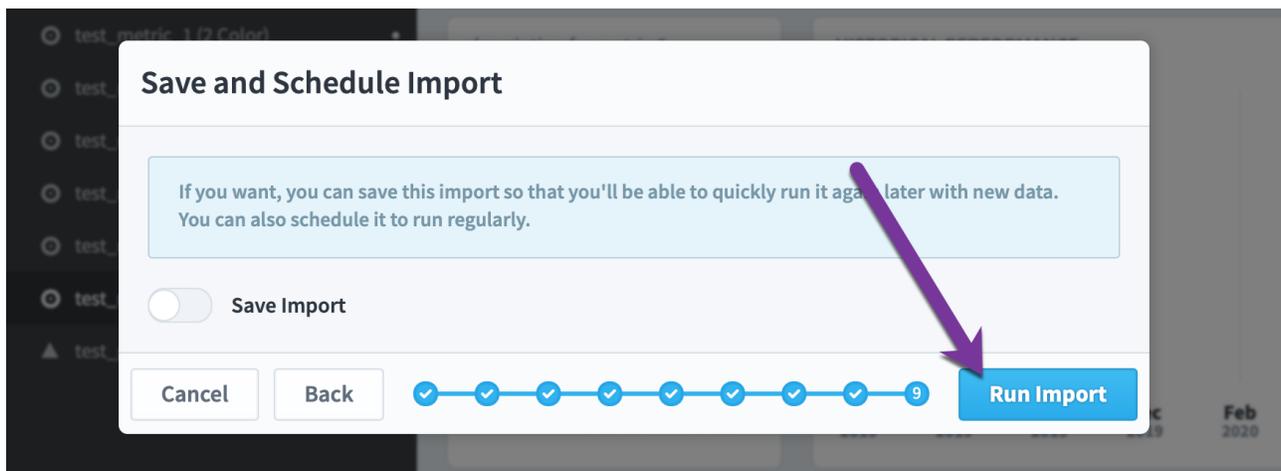
Mapping Import Data to Destination KPIs

Now it's time to match the import data with the destination items. We'll do our best to automatically choose a matching based on name.

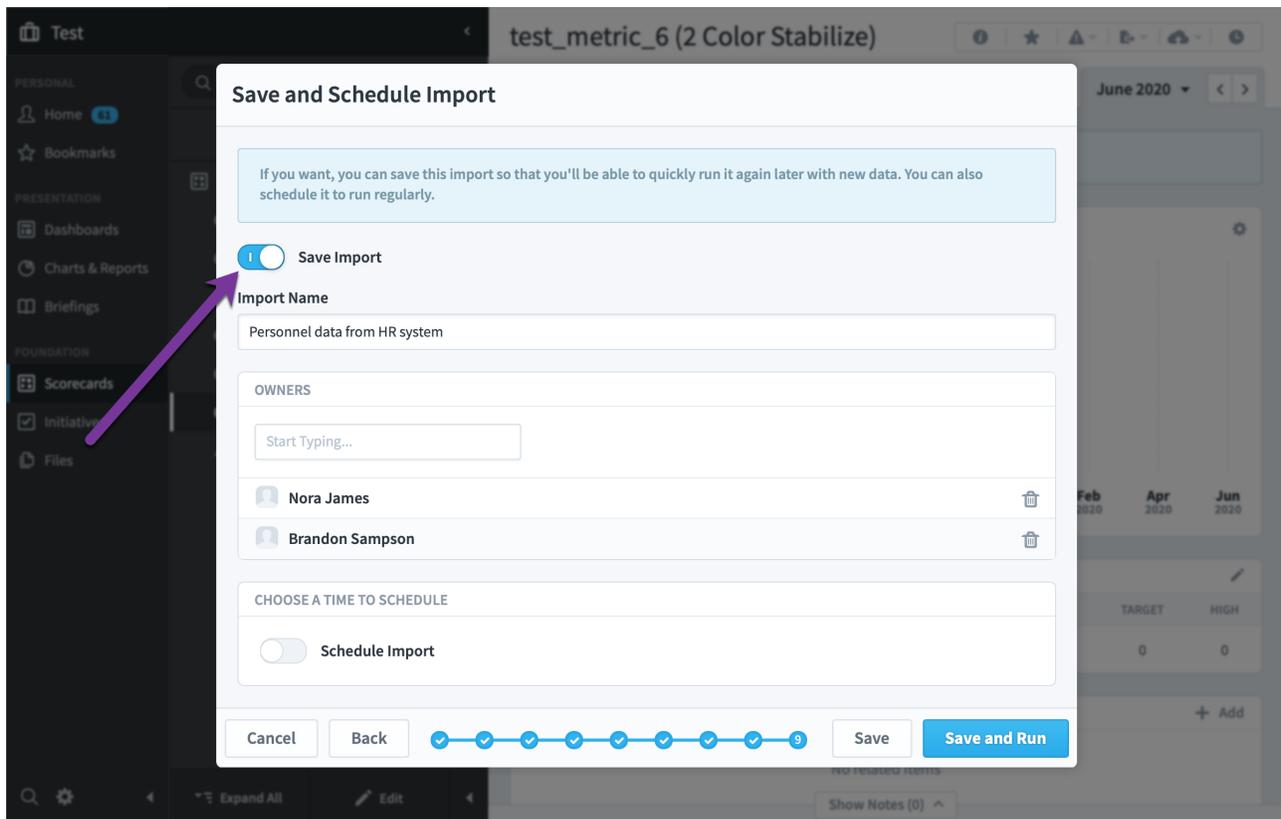


Saving and Scheduling

Your value import is now ready to run.



If you want, you can also save your import so you can quickly run it again later with new data. By assigning other users and groups as owners, you can share this import with other people.



You can even schedule the import to run on a recurring basis. In this example we're going to import a new version of the data every Sunday night.

Test test_metric_6 (2 Color Stabilize)

Save and Schedule Import

If you want, you can save this import so that you'll be able to quickly run it again later with new data. You can also schedule it to run regularly.

Save Import

Import Name
Personnel data from HR system

OWNERS

Start Typing...

Nora James

Brandon Sampson

CHOOSE A TIME TO SCHEDULE

Schedule Import

EVERY ON

↳ AT

Cancel Back Save **Save and Run**

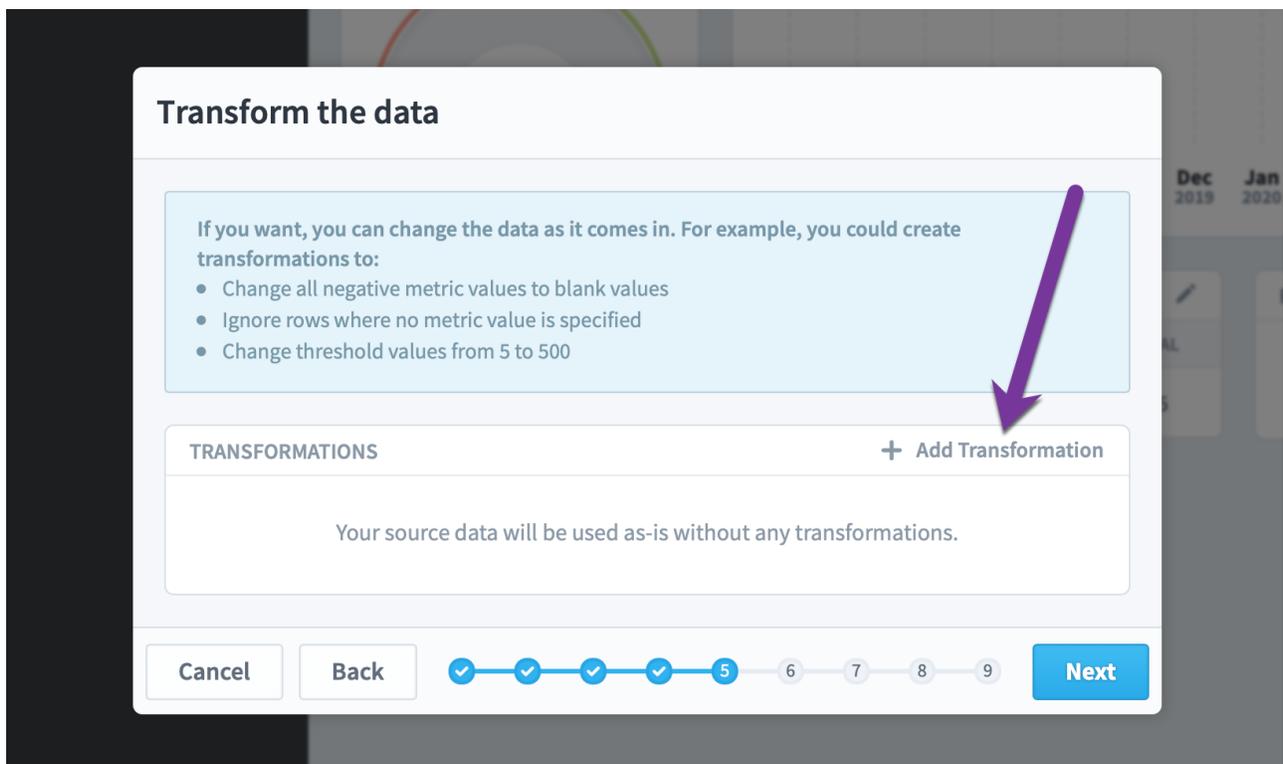
Transforming Values While Importing

Overview

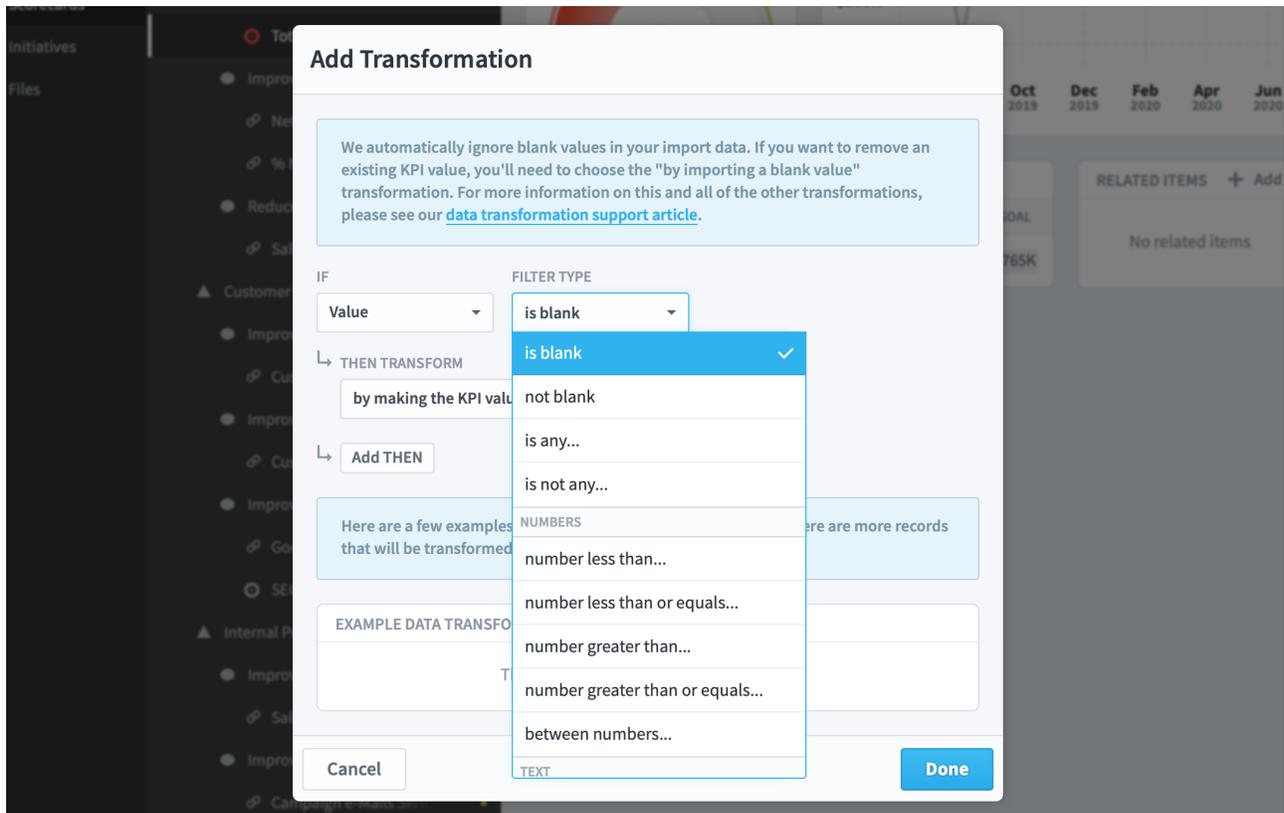
Many types of imports have an optional step to transform your data. This is useful for things like cleaning your data or for skipping over data you don't want to import. In the example below, we're importing KPI values, but transformations work the same regardless of what kind of data you're importing.

Adding Transformations

The transformation step of all imports is optional, so if you want to import your data as-is, just click next. If you want to change your data before it's imported, however, click Add Transformation.



This opens the add transformation menu where you can apply any combination of dozens of types of transformations to your data.



For example, you can create a filter to set the KPI value to N/A if the value column is less than 1.

Add Transformation

We automatically ignore blank values in your import data. If you want to remove an existing KPI value, you'll need to choose the "by importing a blank value" transformation. For more information on this and all of the other transformations, please see our [data transformation support article](#).

IF: Value | FILTER TYPE: number less than... | NUMBER: 1

THEN TRANSFORM: by making the KPI value N/A

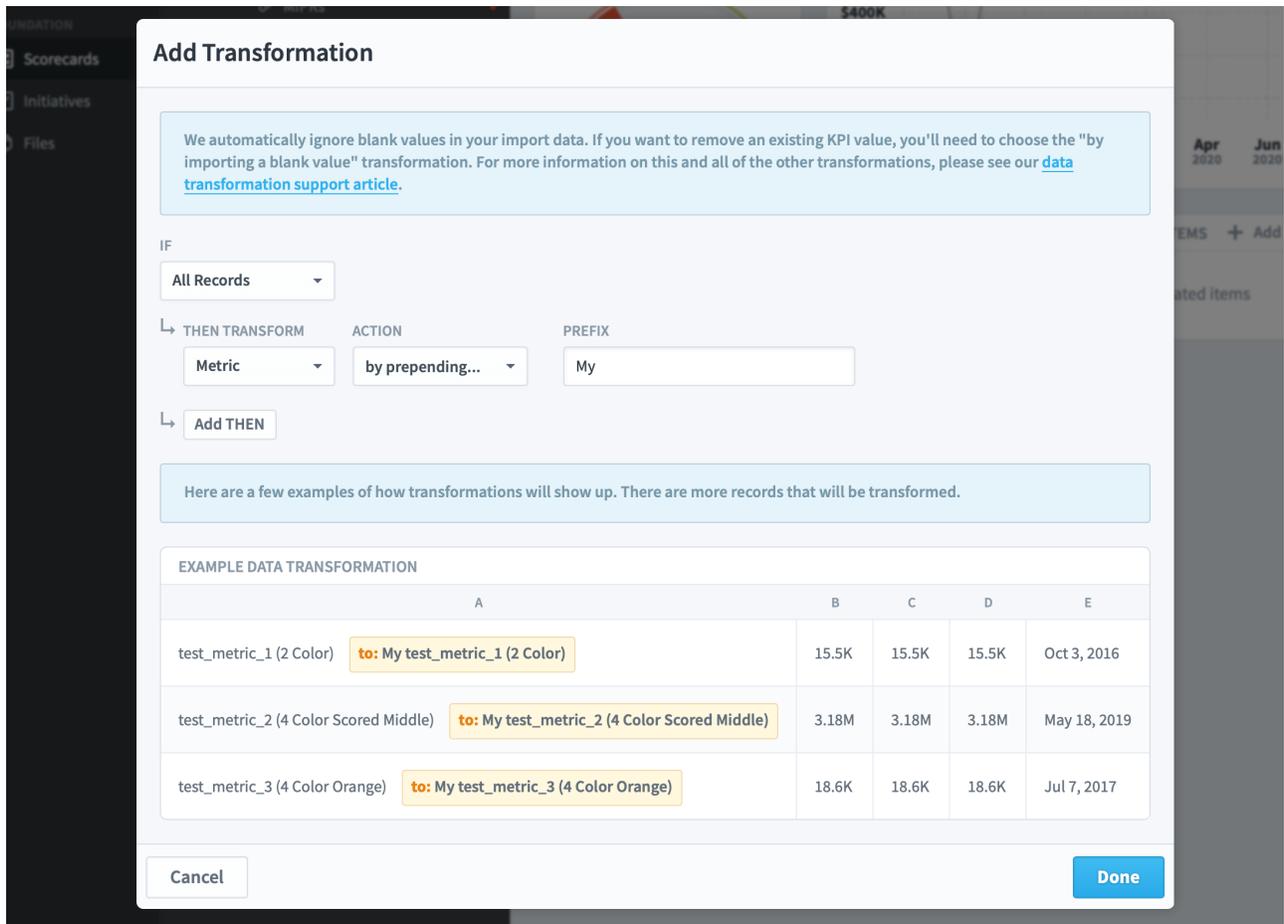
Add THEN

Here are a few examples of how transformations will show up. There are more records that will be transformed.

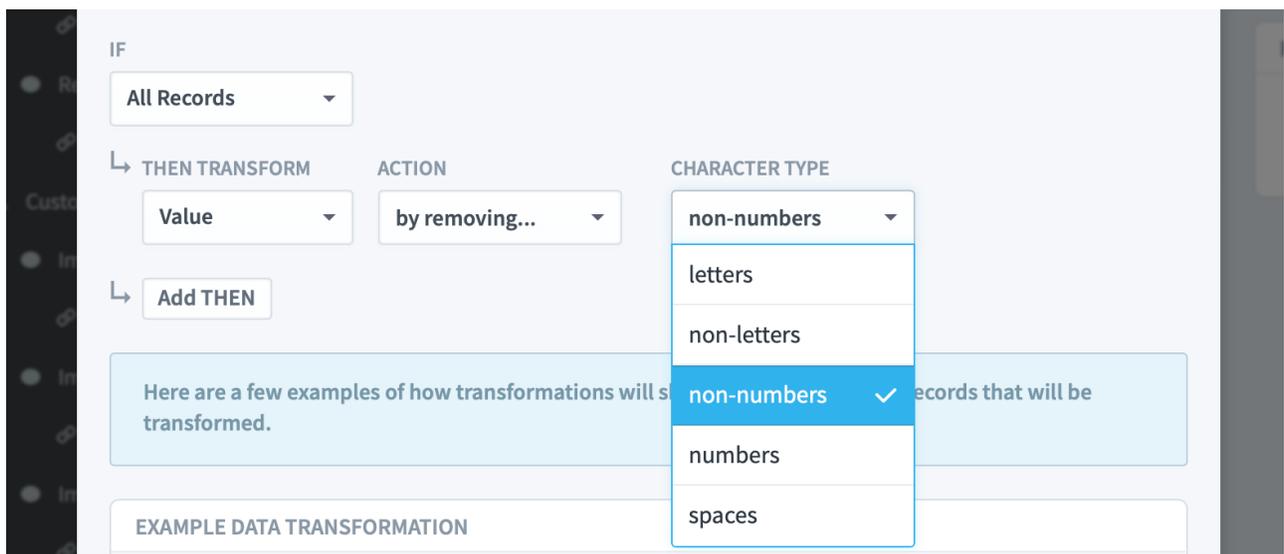
EXAMPLE DATA TRANSFORMATION					
A	B	C	D	E	
test_metric_4 (Unscored)	0.985 to: N/A	1	1	Mar 26, 2019	
test_metric_6 (2 Color Stabilize)	0.011774 to: N/A	0	0	Dec 4, 2017	
test_metric_10 (Goal Only)	0.3721 to: N/A	0.4	0.4	Oct 23, 2018	

Cancel Done

Here we're adding "My" to the beginning of every KPI name.



You can even use transformations to do data cleanup, like removing all non-numbers from the Value column.



Regular Expression Filter

Add Transformation

We automatically ignore blank values in your import data. If you want to remove an existing measure value, you'll need to choose the "by importing blank value" transformation.

IF: Metric

FILTER TYPE: matches regular expression...

TEXT: b[aeiou]bble

THEN TRANSFORM: Value

ACTION: by making the value...

NEW VALUE: 0

Add THEN

The "matches regular expression" filter is incredibly powerful, but it's also very technical. Regular expressions are used in software development and some advanced software applications to match text. In this example, the regular expression `b[aeiou]bble` will match the following words:

- babble
- bebble
- bibble
- bobble
- bubble

There are resources across the web to help you learn how to make a regular expression to match the text you want. We've also found that [RegExr](#) is an online tool that works well for building the perfect regular expression.

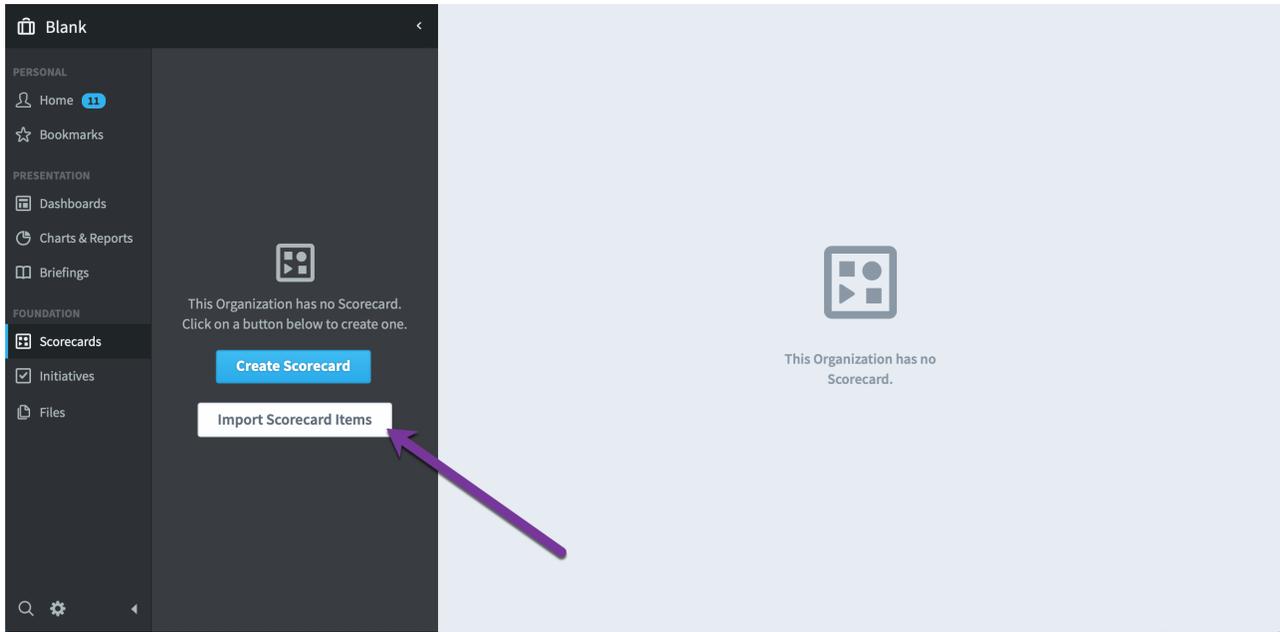
Importing Scorecard Items

Users who have permission to modify scorecard structure can now import scorecard items from a spreadsheet directly inside of Spider Impact. To start, just click on the "Import Scorecard Items" button on any tab in the Scorecards section.

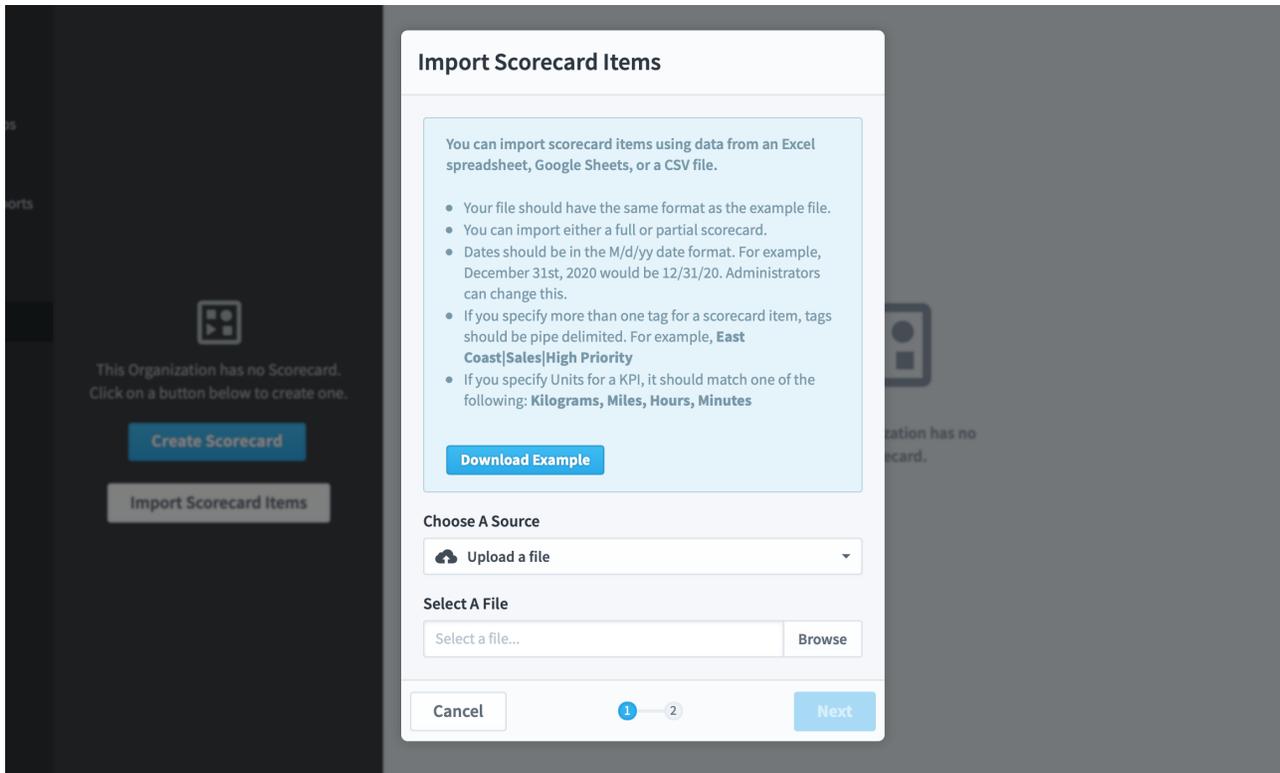
The screenshot displays the Spider Impact interface for the 'Production Costs' scorecard. The left navigation pane is open to the 'Scorecards' section, with 'Production Costs' selected. The main view shows a performance gauge with a score of 8.1, a historical performance line chart, and a table of actual and threshold values. An 'Import' menu is open, highlighting the 'Scorecard Items' option.

ACTUAL AND THRESHOLD VALUES				
	SCORE	ACTUAL	RED	GOAL
● June 2020	8.1	275K	276K	275K

Or, if your organization doesn't have a scorecard yet, you can click on the "Import Scorecard Items" button in the navigation pane.



This opens a dialog where you can upload your spreadsheet. You can also download an example file showing what your spreadsheet can look like.



Finally, Spider Impact can easily export existing scorecard items in exactly this format so you can import it to another organization, or modify your data to be re-imported. This is covered in the [Exporting Scorecard Import File](#) article.

If your columns have the same names as their corresponding scorecard item fields, the software will automated add the correct labels. Otherwise, you'll need to drag and drop the column labels to correctly match the columns.

Scorecard Item Import

This step allows you to choose what to import. The ignore checkboxes allow you to skip rows that you don't want to import, such as rows containing column headings.

Worksheet: scoreboard_Structure

MAP YOUR RESULTS

Key Performance Area Objective Generic **KPI** Units Tags Threshold

IGNORE	Scorecard	Key Performance Area	Drag & Drop Labels Here	Generic	Drag & Drop Labels Here	Description	Start date	Archive date
<input checked="" type="checkbox"/>	Scorecard	Perspective	Tom	Generic	Metric	Description	Start Date	Archive Date
<input type="checkbox"/>	Root				test_metric_1 (2 Color)	description for metric 1		
<input type="checkbox"/>					test_metric_2 (4 Color Scored Middle)	description for metric 2		
<input type="checkbox"/>					test_metric_3 (4 Color Orange)	description for metric 3		
<input type="checkbox"/>					test_metric_4 (Unscored)	description for metric 4		
<input type="checkbox"/>					test_metric_5 (2 Color)	description for metric 5		
<input type="checkbox"/>					test_metric_6 (2 Color Stabilize)	description for metric 6		
<input type="checkbox"/>		test_perspective 7			test_metric_7 (2 Color Stabilize)	description for metric 7		
<input type="checkbox"/>				test_generic 8				

[Show All Rows](#) (May take several minutes)

Cancel Back 2 Done

You can import an entire scorecard, or you can import just a few scorecard items at a time. In this example the "improve customer satisfaction" objective is selected when we click the "import scorecard items" button, so everything we import will be created underneath that.

c. ← **Improve Customer Satisfaction** ⓘ ⚠ ☁ 🕒

Overview **KPIs** ! Edit **June 2020** ← →

This is where you edit and create scorecard items one at a time. If you want to edit many at once, use the [Report Writer](#) to filter for items to edit, then click the Mass Edit button. For example, [this report](#) shows all scorecard items in this organization, where you can change anything, including item names, aggregation type, or owners and updates.

Name **Type**

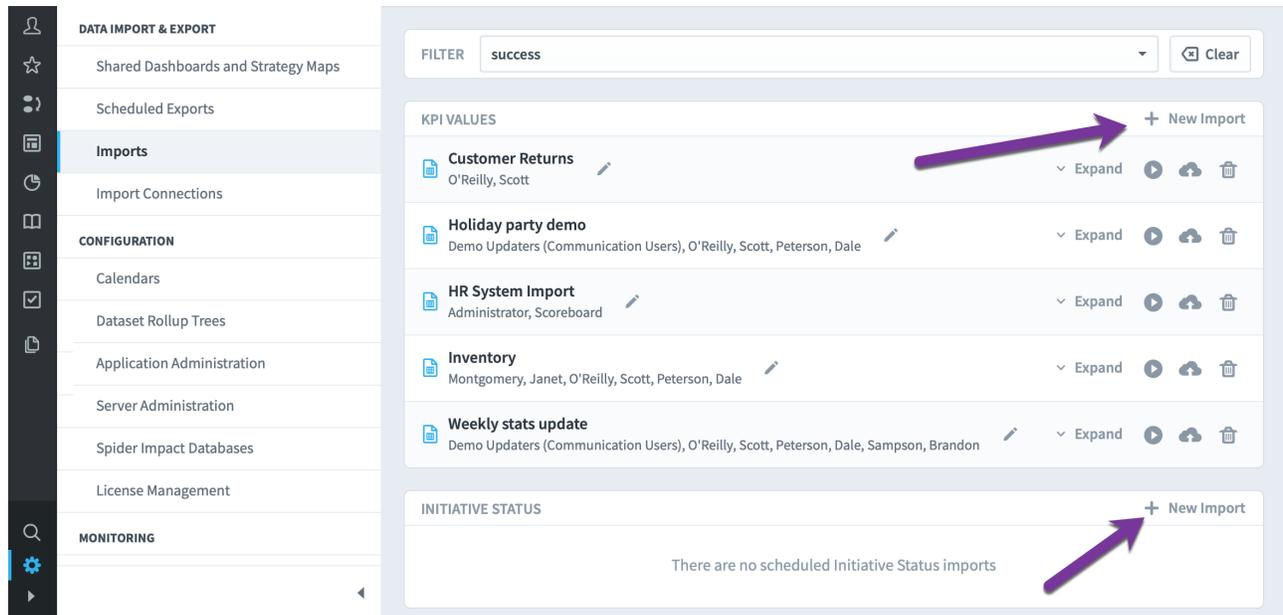
Description **Weight**

[Advanced Options](#)

Managing Imports and Connections

Managing Imports

The Admin > Imports screen is where users can go to manage their saved imports. Everything is organized by import type, and you can create a new import by clicking on the New Import button for that type.



Users who are in a group with the "Manage all Imports" or "Application Administration" permission are able to see and edit all imports. Otherwise, they can see and edit imports that they (or a group that they're in) own.

You can apply a filter at the top of the page to change which imports are showing. You can filter based on things like owners, names, and whether the last import was successful. If there are more than 10 saved imports, this screen will automatically add a filter for only your imports to save time when you first view the screen.

FILTER Dale Peterson Clear

Include Results From Group Memberships

KPI VALUES + New Import

Holiday party demo Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale	Expand			
Inventory Montgomery, Janet, O'Reilly, Scott, Peterson, Dale	Expand			
Weekly stats update Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale, Sampson, Brandon	Expand			

Clicking on one of the imports will expand the row to show the import details. You can see the results of the last import, edit the import details, or change its schedule.

FILTER Dale Peterson Clear

Include Results From Group Memberships

KPI VALUES + New Import

Holiday party demo Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale	Collapse						
DATA SOURCE INFO 2 - advanced.xlsx	TRANSFORMATIONS 2	MAPPINGS 23	IMPORT SCHEDULE Not Scheduled	LAST RUN Dec 6, 2019 4:06 PM			
RESULTS 23 0 Details							
Inventory Montgomery, Janet, O'Reilly, Scott, Peterson, Dale	Expand						
Weekly stats update Demo Updaters (Communication Users), O'Reilly, Scott, Peterson, Dale, Sampson, Brandon	Expand						

Import Connections

The Admin > Import Connections screen is where you go to manage all of the data sources that Imports use. Users with the "Application Administration" permission can see all imports. Otherwise, you can only see the imports to which you have been assigned an owner.

The screenshot displays the 'Administration' interface. On the left, a sidebar lists navigation options: PERSONAL (Home, Bookmarks), PRESENTATION (Dashboards, Charts & Reports, Briefings), FOUNDATION (Scorecards, Initiatives, Datasets, Files), and a search/gear icon at the bottom. The main 'Administration' menu includes: PERSONAL (My Profile, My Alerts), USERS & GROUPS (Users, Groups & Permissions, Send Broadcast Alert), DATA IMPORT & EXPORT (Shared Dashboards, Scheduled Exports, Imports), Import Connections (highlighted with a purple arrow), and CONFIGURATION (Calendars, Dataset Rollup Trees, Application Administration). The 'Import Connections' section is expanded, showing three categories of connections, each with an 'Add Connection' button:

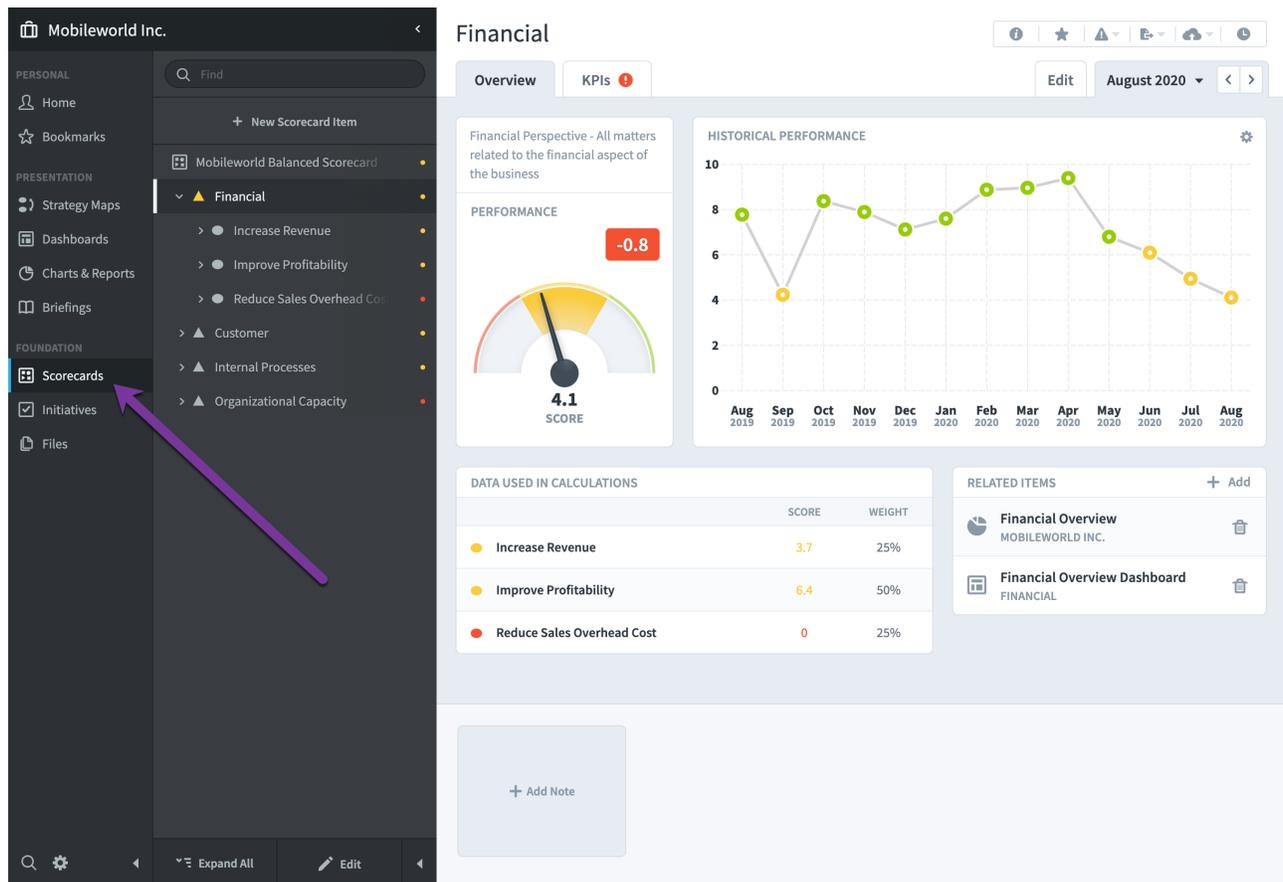
- DATABASE CONNECTIONS**
 - SQL Server Connection for Import testing
 - cs3 Connection for dataset testing
 - cs3 test for delete test (Admin, Zack)
- (S)FTP CONNECTIONS**
 - SFTP Import Testing (Admin, Zack, Test, Zack T.)
 - SFTP (from old connect) (Admin, Zack)
 - Test if new setup can select files (Transformation, Zack)
- GOOGLE SHEETS CONNECTIONS**
 - spidertester101@gmail.com (Admin, Zack)
 - spidertester103@gmail.com (Admin, Zack)
 - zack.ahrensback@spiderstrategies.com (Admin, Zack, Transformation, Zack)

Scorecards

Overview of Scorecards

The Scorecard Tree

The Scorecards section is the heart of Spider Impact. It's where you keep all of your performance metrics, as well as where you manage your overall strategy as an organization.



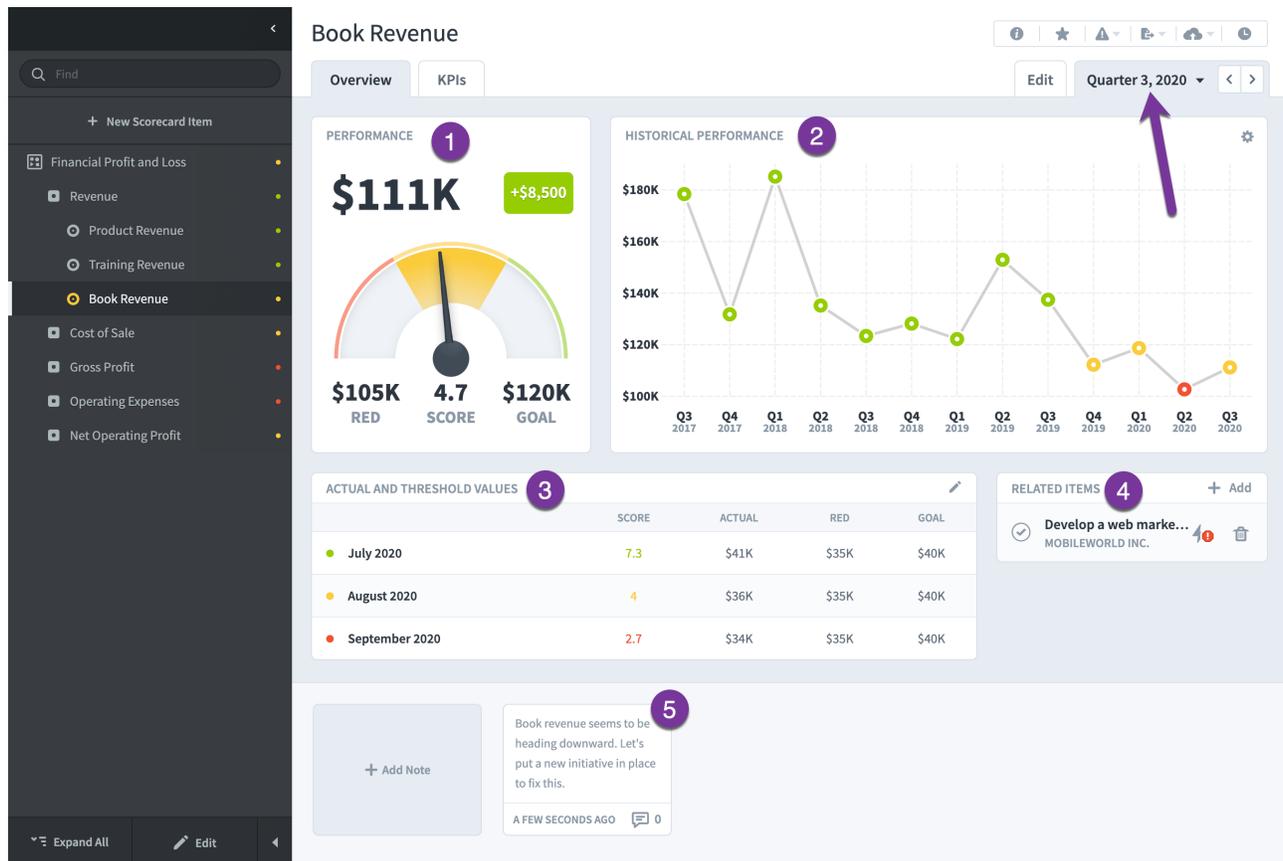
The idea behind Scorecards is simple. At the bottom of your scorecard tree are KPIs. (If you're using the balanced scorecard language, they're called measures, but it's just a different name for the same thing.) Each KPI has a goal, and every month the KPI's actual value is compared against the goal to give it a score and a color.



All of those KPI scores are then rolled up the tree to give scores to your higher-level strategic scorecard items. In this example, the score from this *Training Revenue* KPI is combined with other similar KPI scores to give the *Increase Revenue* objective a score. That objective score is then rolled up with other objectives into the overall *Financial* perspective's score.

Overview Tab

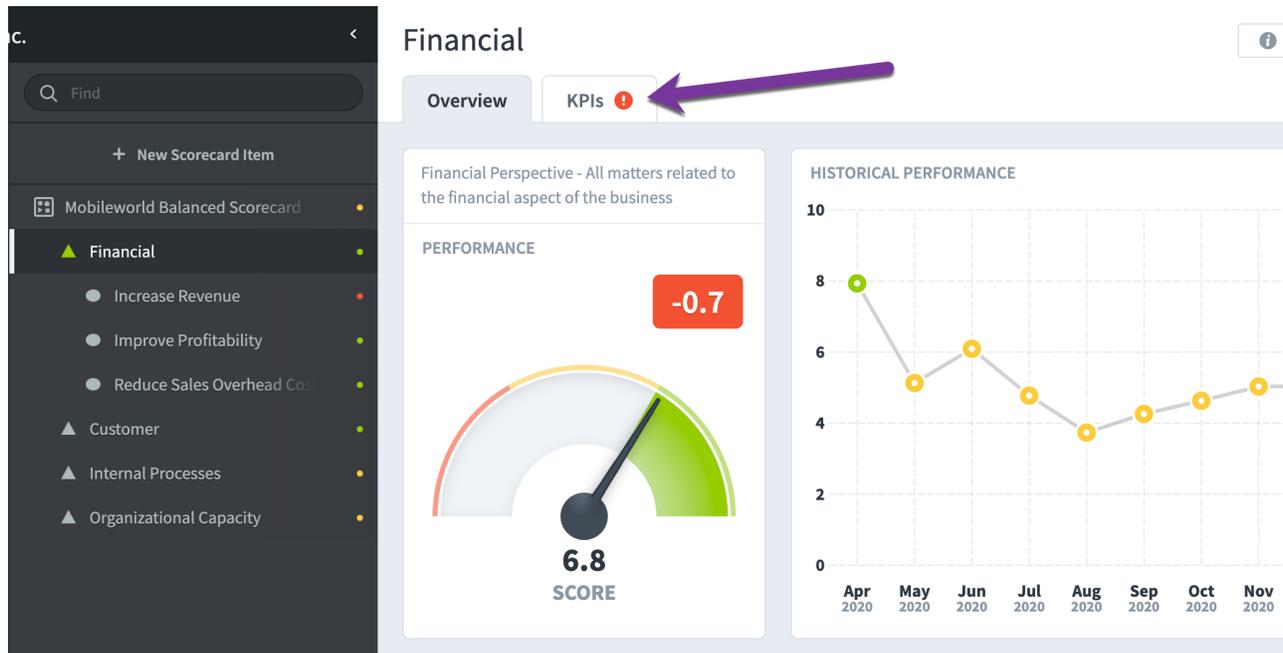
The Scorecards overview tab shows all of the information about a scorecard item and how it's performing. As you click around the scorecard tree on the left, the information for the selected item is shown on the right.



1. The speedometer shows the performance for the current calendar period (purple arrow). In this example we're looking at a KPI and we can see its actual value, goal, and how much it has changed since the previous period.
2. The historical performance chart shows how this KPI has changed over time. You can hover/tap on the chart to see the specific values.
3. The actual and threshold values table includes everything that goes into the score calculation. In this example we're looking at a monthly KPI in quarterly mode (purple arrow), so we see three months' worth of data in the table.
4. You can designate just about anything in Spider Impact as a related item. For example, you may want to link to a supporting document in the Files section. If you choose an Initiative as a related item, Spider Impact will tell you if the initiative appears to be affecting this scorecard item's performance.
5. You can create notes for scorecard items that can apply either to specific periods, or to the scorecard item in general.

KPIs (or Measures) Tab

When you're viewing a high-level strategic scorecard item, you'll sometimes see a red icon on the KPIs tab. (This tab is called Measures when you're using balanced scorecard language.) This means that there's a red KPI somewhere under this scorecard item.



If you click on the KPIs tab, you'll see the performance of every KPI that is underneath the currently selected item. This is a great way to see all of the low-level data that's behind a high-level strategic item.

Mobileworld Inc.

- Home
- Bookmarks
- Strategy Maps
- Dashboards
- Charts & Reports
- Briefings
- Scorecards
 - + New Scorecard Item
 - Mobileworld Balanced Scorecard
 - Financial
 - Increase Revenue
 - Improve Profitability
 - Reduce Sales Overhead Costs
 - Customer
 - Internal Processes
 - Organizational Capacity
- Initiatives
- Files

Expand All Edit

Financial

Info Star Alert Print Refresh Clock

Overview

KPIs

Edit

April 2021

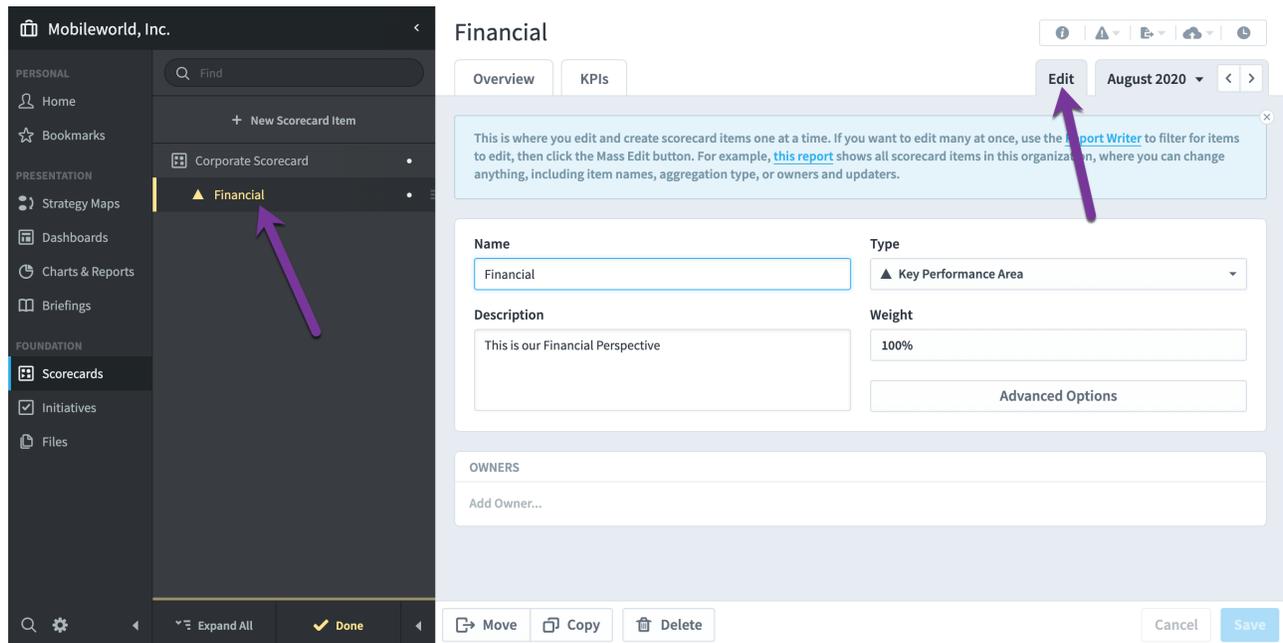
KPIS Display Options

KPI	DEC 2020	TOTAL 2020	JAN 2021	FEB 2021	MAR 2021	APR 2021	TOTAL 2021
Product Revenue	\$437K	\$12.5M	\$442K	\$444K	\$444K	\$441K	\$4M
Training Revenue	\$216K	\$3.34M	\$222K	\$224K	\$226K	\$229K	\$2.09M
Book Revenue	\$13.3K	\$369K	\$16.9K	\$17.8K	\$20.2K	\$23.6K	\$219K
Total Revenue	\$667K	\$16.2M	\$681K	\$686K	\$690K	\$693K	2021 \$218,700
Net Operating Profit (before tax)	\$90.5K	\$983K	\$77.2K	\$80K	\$85.9K	\$81K	\$735K
% Net Operating Profit	11.8%	11.3%	10.8%	11.4%	11.4%	10.8%	10.2%
Sales & General Admin	\$37.7K	\$459K	\$36.2K	\$12.1K	\$15.8K	\$25.3K	\$109K

Scorecard Building Basics

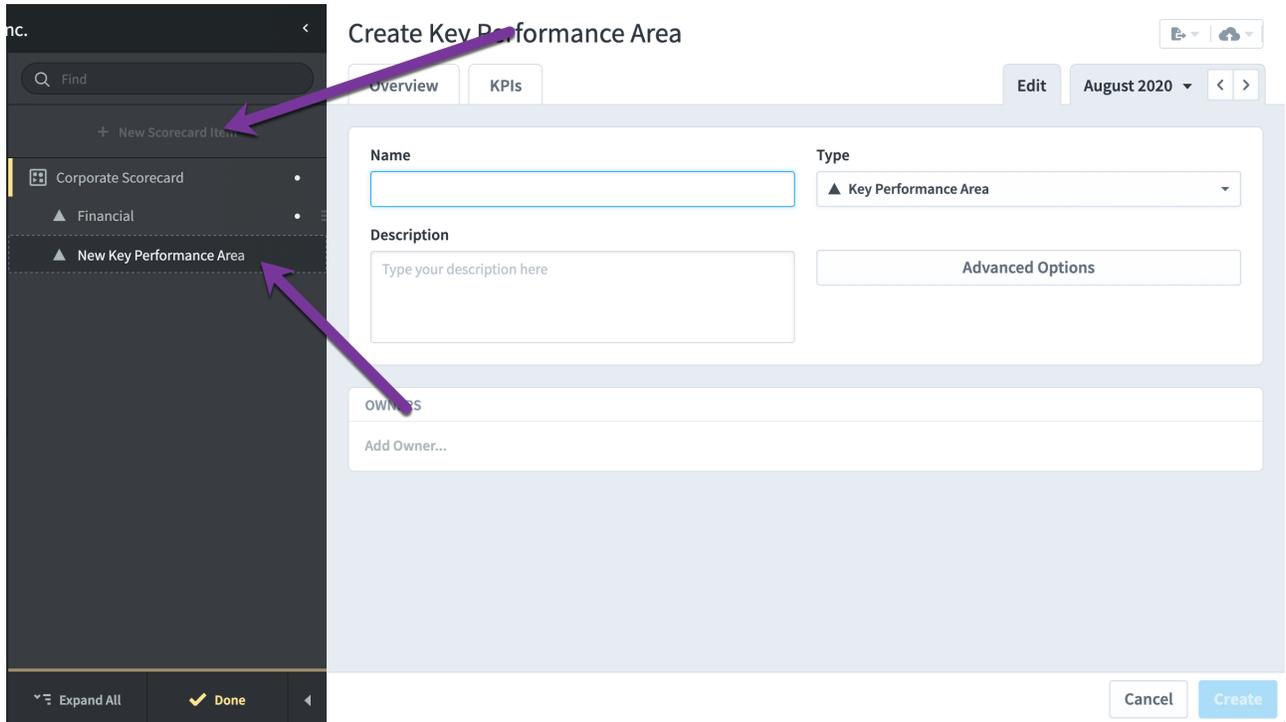
Editing Scorecard Items

To edit an existing scorecard item, just select it in the tree on the left and then go to its Edit tab.

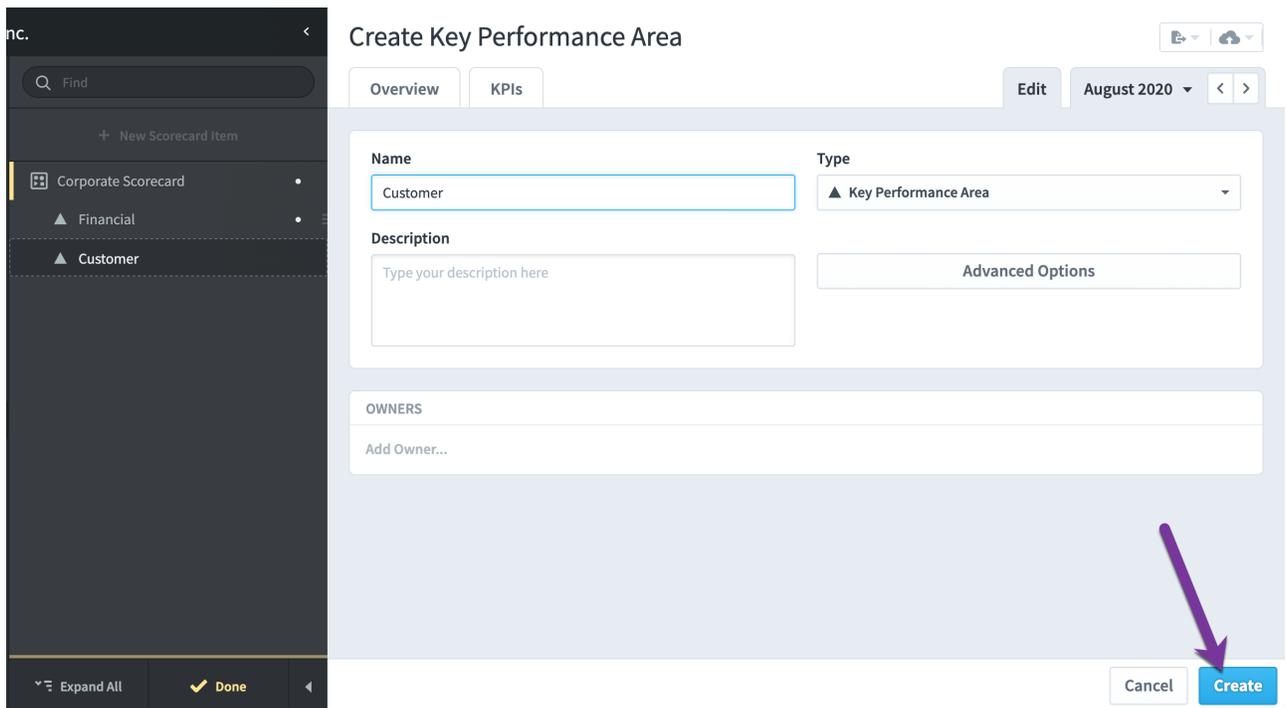


Creating New Scorecard Items

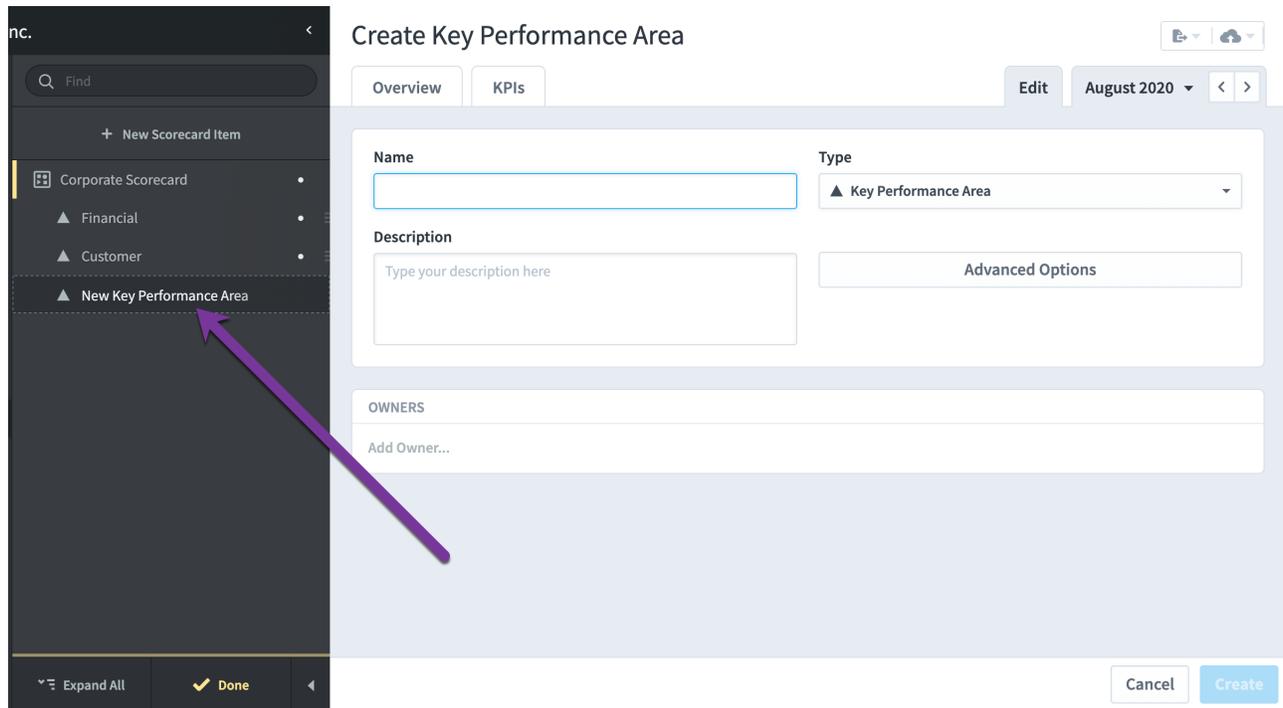
To create a new scorecard item, select its parent in the tree and click the New Scorecard Item button. This will put a placeholder for the new item in the tree and you can start filling out the form.



Once your scorecard item is ready to go, click the Create button (or type the return/enter key on your keyboard).



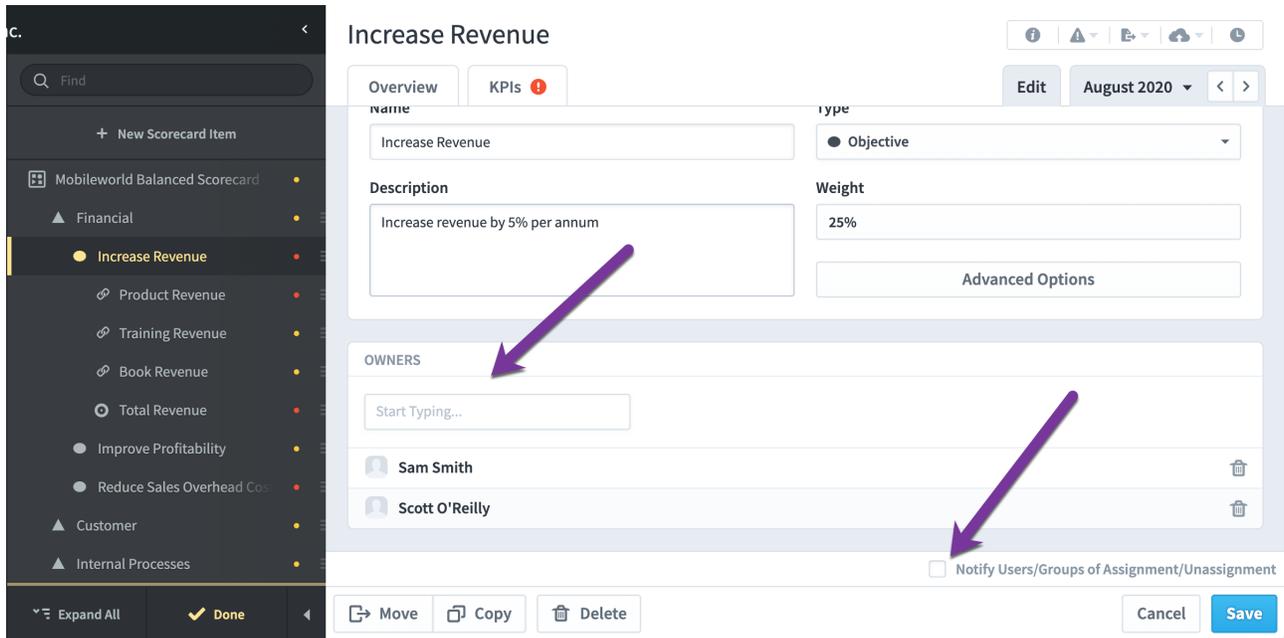
Not only does this save your scorecard item, but it also automatically moves on to creating the next scorecard item in the list.



With a little practice you can quickly create all of your scorecard item siblings this way at once. Just type the scorecard item's name, hit enter on your keyboard, and then start typing the next item's name. You can also hit tab to jump to another field like Description.

Assigning Owners

You can assign users or groups as Owners of any scorecard item and optionally send them an alert when they've been assigned.



Accountability is incredibly important to managing your organization's strategy. By clearly stating who is responsible for a KPI, there will be a point of contact if performance starts to take a turn for the worse.

It's also helpful for the owners because they'll know exactly what they're responsible for. They're able to see a list of all KPIs they own in the Home section.

MY KPIS			
KPI NAME	PERIOD	SCORE	ACTUAL
CUSTOMER SUPPORT			
% Calls answered	August 2020	1.9	92.9%
Average abandonment rate	August 2020	10	0.7%
Average time to answer (seconds)	August 2020	8.3	2
FINANCIAL			
Interest & Bank Charges	August 2020	10	\$4,807
Marketing & Advertising	August 2020	0	\$74.6K
National Insurance	August 2020	10	\$12.9K
Office Rental	August 2020	0	\$58.8K
Pension Contribution (3%)	August 2020	10	\$0
Sales & General Admin	August 2020	0	\$55.8K
Training Venue Costs	August 2020	3.4	\$39.6K

KPI (or metric) Details

KPIs (or metrics if you're using balanced scorecard language) are a little more complicated than other types of scorecard items. The good news is that all of the default KPI settings work wonderfully. Most of the time you can just give your KPI a name, an owner, and a couple threshold values. If you really want to customize your KPIs, though, Spider Impact has the tools to do it.

First, let's review all of the KPI details.

The screenshot shows the 'Training Revenue' KPI configuration page in Spider Impact. The interface includes a sidebar with a search bar and a list of scorecard items, with 'Training Revenue' selected. The main area has tabs for 'Overview' and 'KPIs', and a top right section with 'Edit' and 'August 2020' options. A blue informational box at the top explains the editing process. The main form contains fields for 'Name' (Training Revenue), 'Type' (KPI), 'Description' (placeholder: Type your description here), and 'Weight' (33.3%). Below the form is a 'KPI DETAILS' section with six numbered callouts: 1. Scoring Type (Goal/Red Flag), 2. Calendar (Monthly), 3. Data Type (Currency), 4. Aggregation Type (+ Sum), 5. Decimal Precision (Default), and 6. Currency (Default).

1. **Scoring Type** is how your KPI gets its score. The default *Goal/Red Flag* option is the most popular by far. You choose a number where your KPI turns green, and a number where your KPI value turns red. Please see our [KPI Scoring Types](#) article for more information.
2. **Calendar** is how often you update your KPI.
3. **Data Type** is the kind of number you want to use. You can choose *Number*, *Percentage*, or *Currency*.
4. **Aggregation Type** is how to combine KPI data for multiple periods. For example, a monthly KPI's quarterly totals. Most KPIs are *Sum* or *Average*, but there are also options for *Geometric Mean* and *Last Value (already aggregated)*.
5. **Decimal Precision** is how many numbers you want to the right of the decimal point. You can also set the default decimal precision for Spider Impact in the [Application Administration](#) section.
6. **Currency** allows you to choose a specific country's currency and is only an option when configured in the [Application Administration](#) section.

When you choose *Number* for the data type, you also have the ability to specify a unit of measurement if you've configured *Units* in the [Application Administration](#) section.

KPI DETAILS

Scoring Type	Calendar	Data Type
<input type="text" value="Goal/Red Flag"/>	<input type="text" value="Monthly"/>	<input type="text" value="# Number"/>
Aggregation Type	Decimal Precision	Units
<input type="text" value="Average"/>	<input type="text" value="Default"/>	<input type="text" value="days"/>

KPI Series

Every KPI has actual values that are updated regularly. Depending on the KPI's scoring type, it may also have one or more scoring thresholds that can change month to month.

In this example we're using *Goal/Red Flag* scoring and we have three series to configure:

SERIES

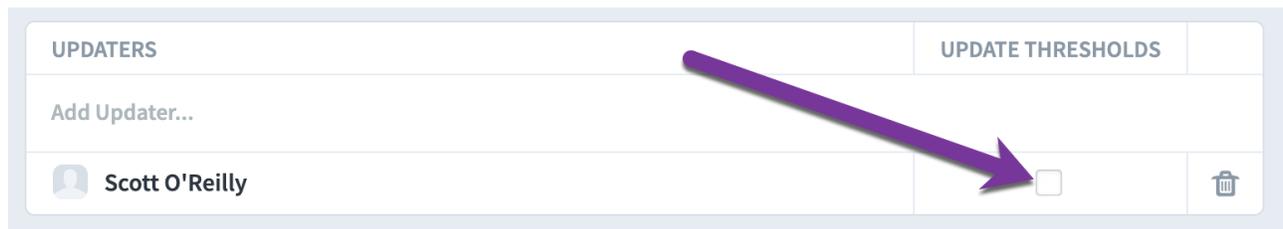
Actual Value	Red Flag	Goal
<input type="text" value="Manual"/>	<input type="text" value="Manual"/>	<input type="text" value="Manual"/>
	<input type="text" value="255,000"/>	<input type="text" value="260,000"/>

1. Every series has an update type. It defaults to manual, but you can also choose Calculated or Template Rollup. Please see the [Calculated KPIs](#) article for more information.

2. Every manual threshold has a default threshold value. In this example our KPI will turn red if the value is lower than 255,000 and green if it's higher than 260,000. When higher values are worse, the Goal threshold is going to have a lower number than the Red Flag threshold.

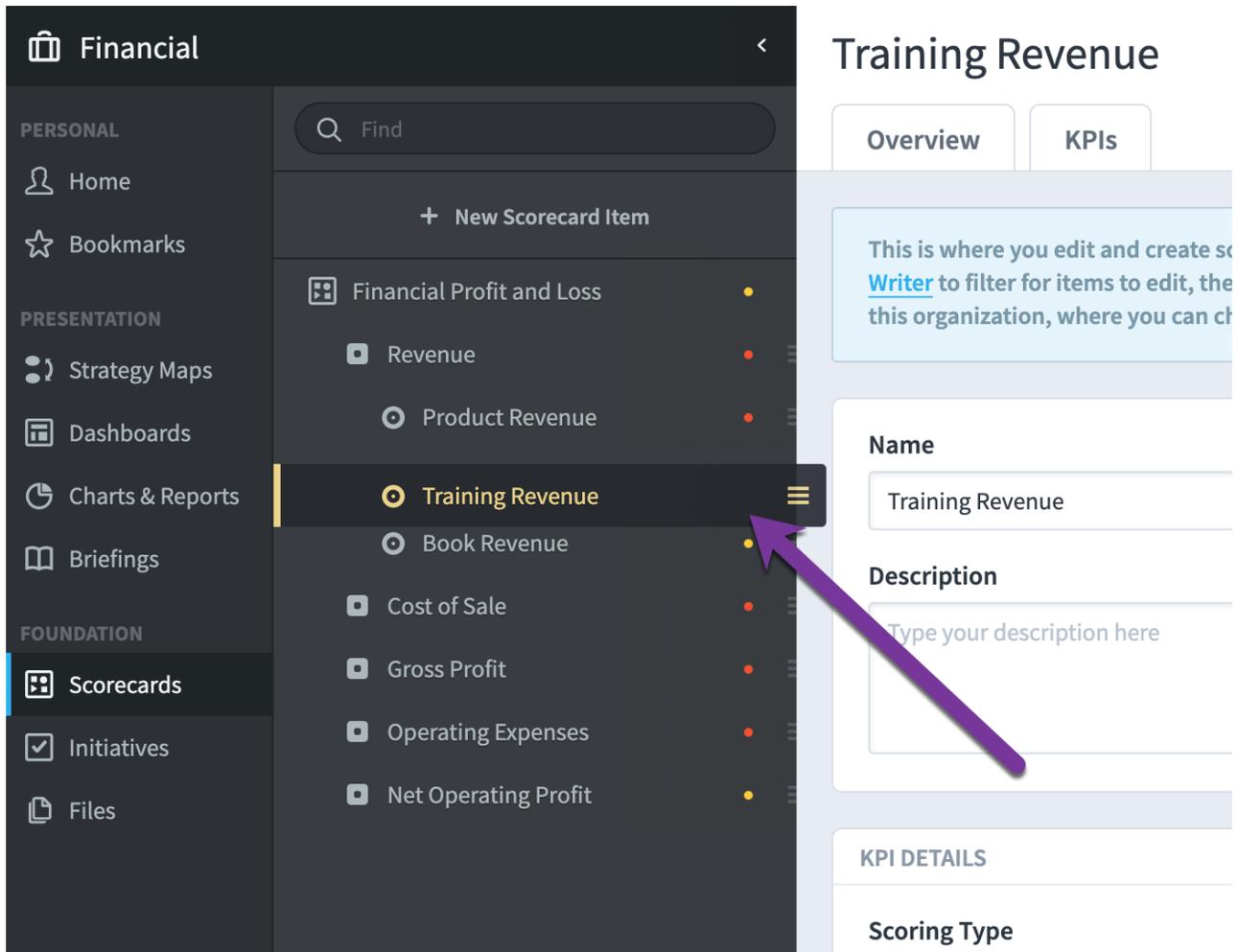
KPI Updaters

The last thing you can configure for KPIs is *Updaters*. Here you can designate one or more users or groups as updaters for the KPI. By clicking the *Update Thresholds* checkbox you can also give them the ability to change things like the KPI's goals for each period.



Rearranging the Tree

When you're on the Edit tab, you can rearrange your scorecard items by dragging and dropping them in the tree.



Editing Multiple Scorecard Items at Once

On the top of the Edit tab is a blue notification box explaining how to edit more than one scorecard item at the same time. Please see the [Editing Multiple Scorecard Items at Once](#) article for more information.

Financial ←

Find

+ New Scorecard Item

- Financial Profit and Loss
 - Revenue
 - Cost of Sale
 - Product Costs
 - Training Venue Costs
 - Book Production Costs
 - Total Costs**
 - Gross Profit
 - Operating Expenses
 - Net Operating Profit

Expand All Done

Total Costs

Overview KPIs Edit February 2020

This is where you edit and create scorecard items one at a time. If you want to edit many at once, use the [Report Writer](#) to filter for items to edit, then click the Mass Edit button. For example, [this report](#) shows all scorecard items in this organization, where you can change anything, including item names, aggregation type, or owners and updaters.

Name	Type
Total Costs	<input checked="" type="radio"/> KPI
Description	Weight
	25%
Advanced Options	

KPI DETAILS

Move Copy Delete Cancel Save

KPI Scoring Types

Overview

There are many different Scoring Types that you can choose for a KPI.

The screenshot shows the 'KPI DETAILS' configuration page. A dropdown menu for 'Scoring Type' is open, listing options such as 'Unscored', 'Yes/No', 'Goal Only', '2 Color', 'Goal/Red Flag' (selected), '3 Color', '4 Color Blue', '4 Color Orange', '4 Color Scored Middle', '2 Color Stabilize', and '3 Color Stabilize'. Other visible settings include 'Calendar' set to 'Monthly', 'Data Type' set to 'Currency', 'Decimal Precision' set to 'Default', 'Currency' set to 'Default', 'Red Flag' set to 'Manual' with a value of 39,584, and 'Goal' set to 'Manual' with a value of 38,750. The user 'Scott O'Reilly' is logged in.

Every scoring type changes the things that you can configure for the KPI.

Goal/Red Flag

The default KPI scoring type is *Goal/Red Flag*, and it's the most popular option by far. You choose a number where your KPI turns green, and a number where your KPI value turns red.

SERIES

Actual Value	Red Flag	Goal
<input type="checkbox"/> Manual	<input type="checkbox"/> Manual	<input type="checkbox"/> Manual
	255,000	260,000

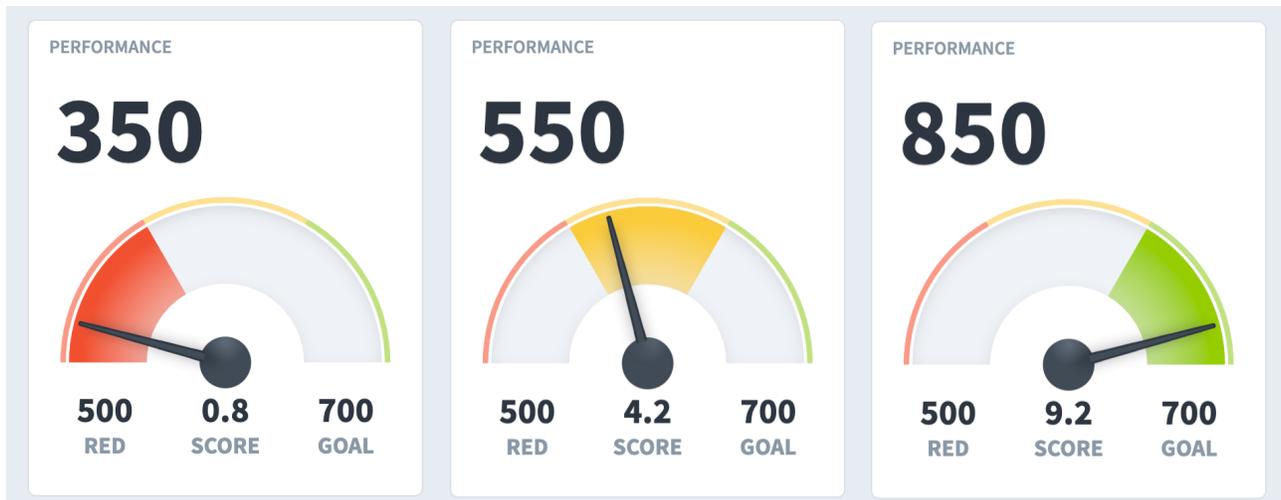
In this example our KPI will turn red if the value is lower than 255,000 and green if it's higher than 260,000. When higher values are worse, the *Goal* threshold is going to have a lower number than the *Red Flag* threshold.

The three colored segments of a Goal/Red Flag speedometer will always be the same size. The Goal is where the score is 6.6 and the Red Flag is where the score is 3.3. Your score will hit 10 at:

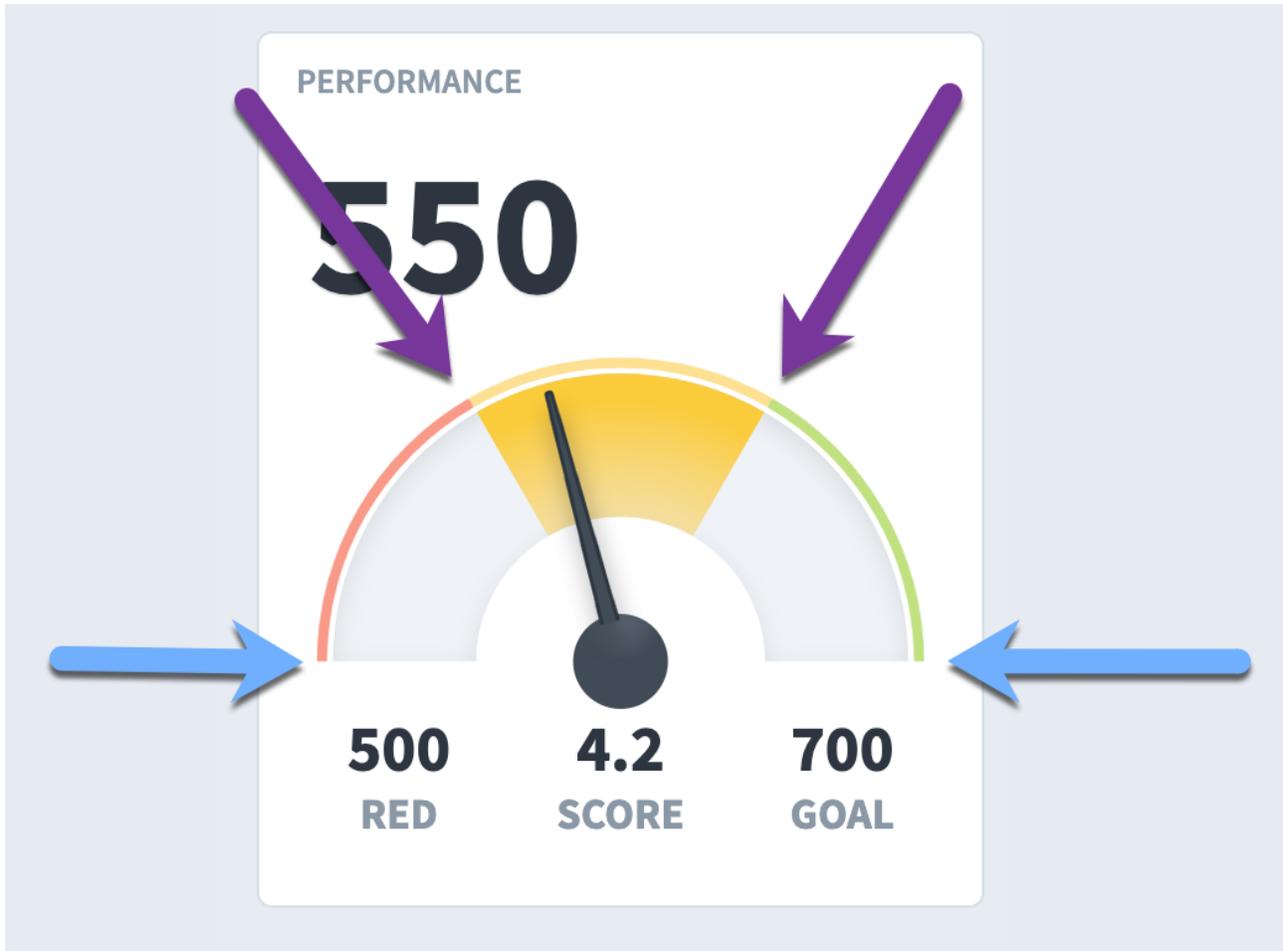
`(goal - red flag) + goal.`

This is better explained with an example. Let's say our goal is 700 and our red flag is 500. There's 200 between the goal and red flag. In Goal/Red Flag scoring, that means:

- Score is 0 when the actual value is 200 less than the Red Flag (300)
- Score is 10 when the actual value is 200 more than the Goal (900)



You actually need 4 thresholds to draw a speedometer with 3 colors. Goal/Red Flag scoring automatically calculates the highest and lowest thresholds for you, though. This way you only have to tell Spider Impact at what value your KPI turns green and at what value it turns red.



Unscored KPIs

Unscored KPIs are great for tracking things that don't make sense to score. Unscored KPIs have no thresholds, just an actual value.

KPI DETAILS

Scoring Type <input type="text" value="Unscored"/>	Calendar <input type="text" value="Monthly"/>	Data Type <input type="text" value="# Number"/>
Aggregation Type <input type="text" value="+ Sum"/>	Decimal Precision <input type="text" value="Default"/>	Units <input type="text" value=""/>

SERIES

Actual Value <input type="text" value="Manual"/>
--

This is what an unscored KPI looks like when visualized.



Yes/No Scoring

Yes/No KPIs track a yes or no value every period rather than a number. They don't have thresholds, but you do tell Spider Impact whether Yes is good or not.

KPI DETAILS

Scoring Type **Calendar** **Is Yes Good?**
📊 Yes/No Monthly 👍 Yes

Aggregation Type
% Percentage Yes

SERIES

Actual Value
☑ Manual

This is what a Yes/No KPI looks like on a manual update form.

Product Revenue	August 2020	300,000 \$	450,000 \$ 465,000 \$	🗨
Training Revenue	August 2020	Yes		🗨
Book Revenue	August 2020	Yes ✓	35,000 \$ 40,000 \$	🗨

Goal Only Scoring

Goal Only KPIs have a single threshold. If you hit your goal you're green. If you don't you're red. There's also a setting to tell Spider Impact whether higher values are better.

KPI DETAILS

Scoring Type: **Goal Only** (indicated by a purple arrow)

Calendar: **Monthly**

Are Higher Values Better?: **Yes** (indicated by a purple arrow)

Data Type: **% Percentage**

Aggregation Type: **Average**

Decimal Precision: **0 digits (example 8)**

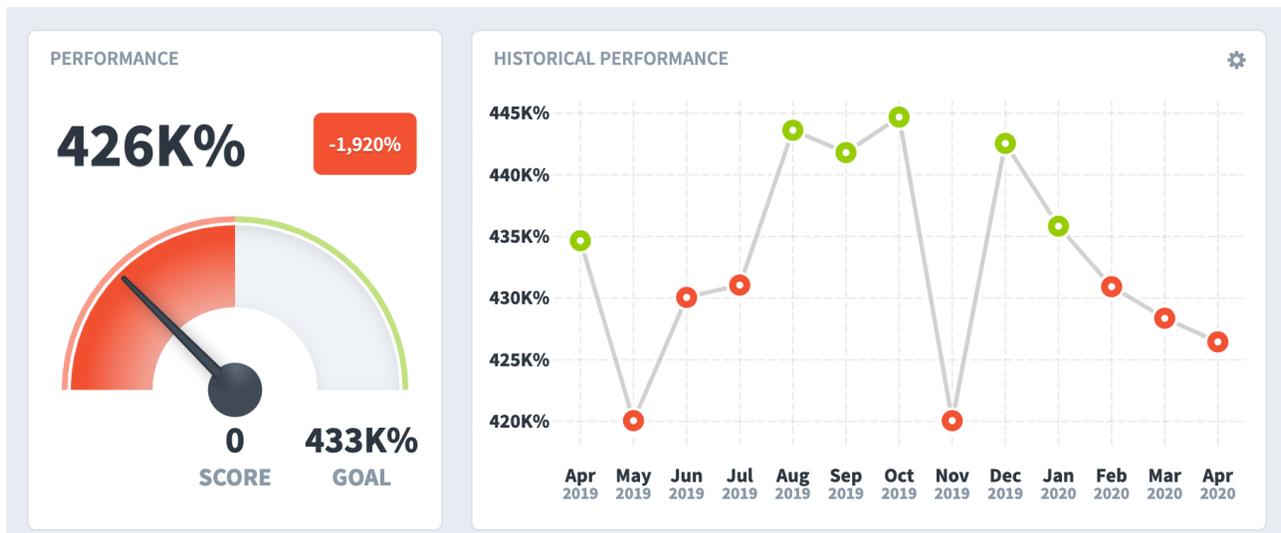
SERIES

Actual Value: **Manual**

Goal: **Manual**

Value: **422,250** % (indicated by a purple arrow)

This is what Goal Only KPIs look like. Notice how the speedometer needle is always directly in the middle of its color segment.



Stabilize Scoring

Stabilize Scoring is great for when you don't want your KPI values to be too high or too low. They also have a very large number of thresholds.

KPI DETAILS

Scoring Type: 3 Color Stabilize (indicated by a purple arrow)

Calendar: Monthly

Data Type: # Number

Aggregation Type: Average

Decimal Precision: 0 digits (example 8)

Units:

SERIES

Actual Value: Manual

Low Worst: Manual (3)

Low Red Flag: Manual (6)

Low Target: Manual (7)

Best: Manual (8)

High Target: Manual (9)

High Red Flag: Manual (10)

High Worst: Manual (13)

This is what a Stabilize KPI looks like. Notice how not every color segment is not the same size because we typed in threshold values that aren't evenly spaced.



Every Other Scoring Type

Every other scoring type is similar. They're all just different variations of color selection, and some even include colors like blue or dark green. All you have to do is enter the color thresholds and Spider Impact will score your KPI.

For example, here's a 4 Color Orange KPI.

KPI DETAILS

Scoring Type 🌈 4 Color Orange	Calendar Monthly	Data Type Currency
Aggregation Type + Sum	Decimal Precision Default	Currency Default

SERIES

Actual Value Manual	Worst Manual 450,000 \$	Red Flag Manual 465,000 \$
Warning Manual 475,000 \$	Goal Manual 500,000 \$	Best Manual 600,000 \$

And this is what that KPI looks like. Again, we don't have evenly spaced thresholds so the segments are different sizes.



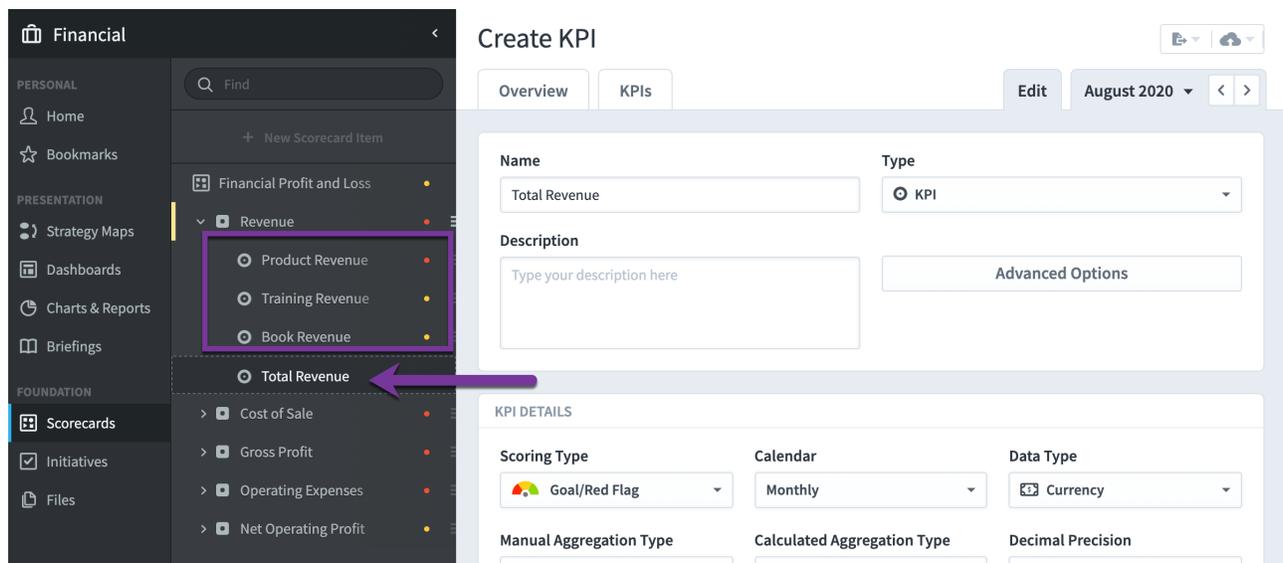
Calculated KPIs

Overview

You can set up KPIs to automatically calculate their actual values and thresholds from other values in Spider Impact. For more information about what Spider Impact actually does when it's calculating a KPI field, please see the [Exploring How a KPI is Calculated](#) article.

Calculated KPI Details

Let's start things off with a simple example. We're going to create a calculated KPI called *Total Revenue* that is the sum of *Product Revenue*, *Training Revenue*, and *Book Revenue*.



There's a lot going on in the Edit tab, so we'll look at each configuration option one at a time.

The screenshot displays the configuration interface for a KPI, divided into two main sections: 'KPI DETAILS' and 'SERIES'.

KPI DETAILS:

- Scoring Type:** Goal/Red Flag
- Calendar:** Monthly
- Data Type:** Currency
- Manual Aggregation Type:** Sum (marked with callout 3)
- Calculated Aggregation Type:** Sum (recommended) (marked with callout 4)
- Decimal Precision:** Default
- Currency:** Default

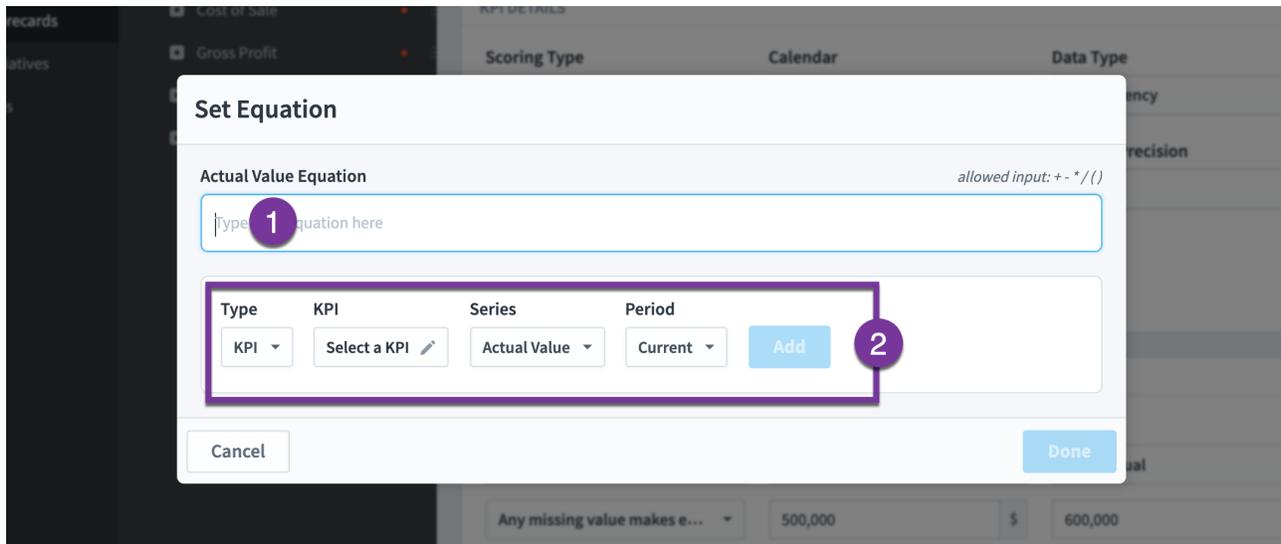
SERIES:

- Actual Value:** Calculated (marked with callout 1)
- Red Flag:** Manual (checkbox checked)
- Goal:** Manual (checkbox checked)
- Any missing value makes entire equation blank:** (marked with callout 5)
- Red Flag Threshold:** 500,000 (marked with callout 2)
- Goal Threshold:** 600,000
- Set Equation:** (marked with callout 6)

1. We've changed the KPI's actual value from *Manual* to *Calculated*.
2. The *Goal* and *Red Flag* thresholds are still manually updated. As you can see, we've typed in default values for both.
3. We can choose a Manual Aggregation Type like *Sum* or *Average*. This only applies to the threshold values because they are manually updated.
4. We can choose a Calculated Aggregation Type. The options here are *Sum (recommended)* and *Use Equation*. This only applies to the Actual Value because it is calculated.
5. By default, if a KPI equation is referencing a value that is blank, the entire equation will immediately evaluate to blank. You can instead choose to treat missing values in the equation as 0, N/A, or Blank.
6. This is the button to set the KPI's equation. We'll cover that next.

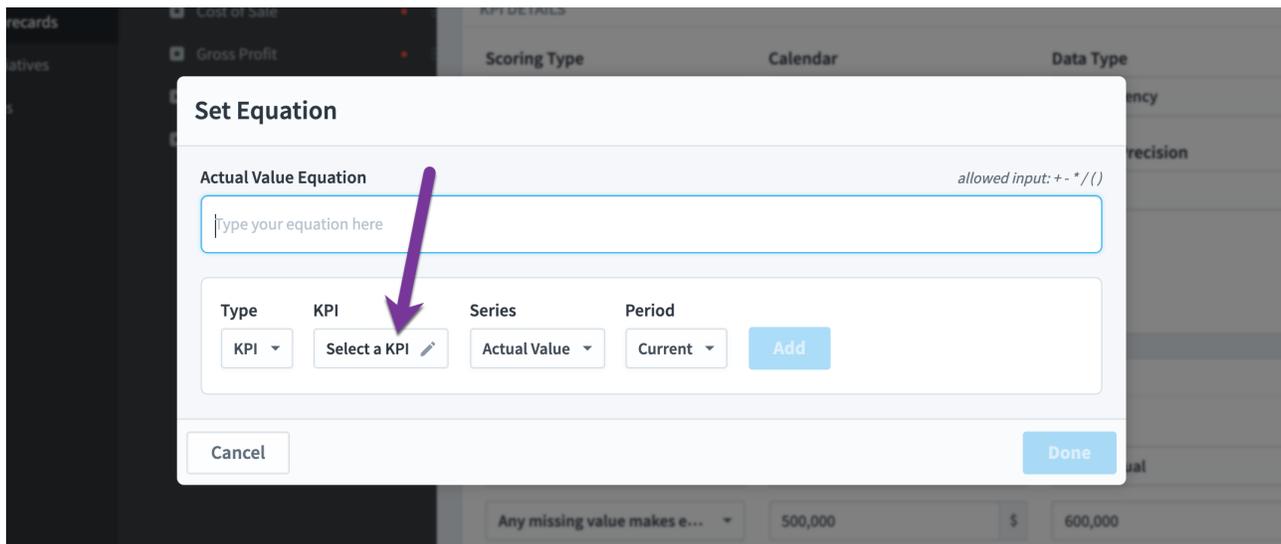
KPI Equations

When you click the Set Equation button, it shows a dialog for building the equation for that series.

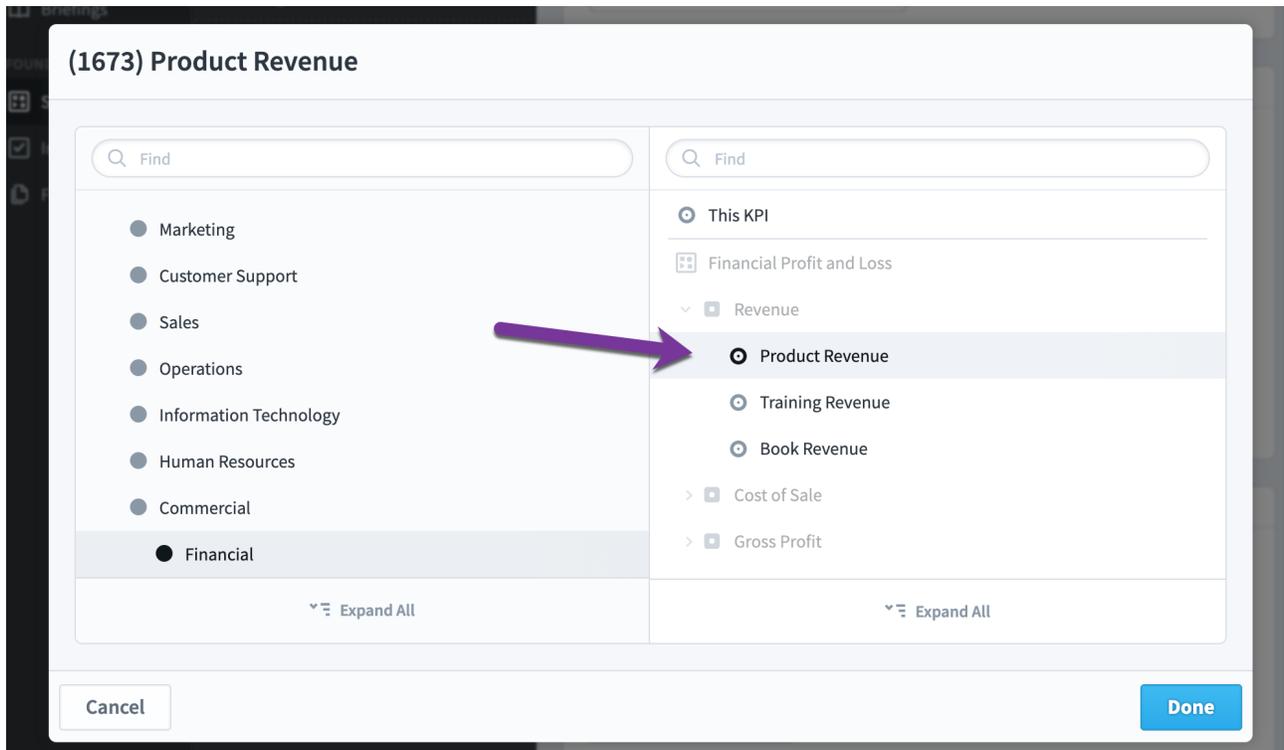


1. This is where the equation that we're building goes. You can type text directly here.
2. This builds functions that we send into the equation.

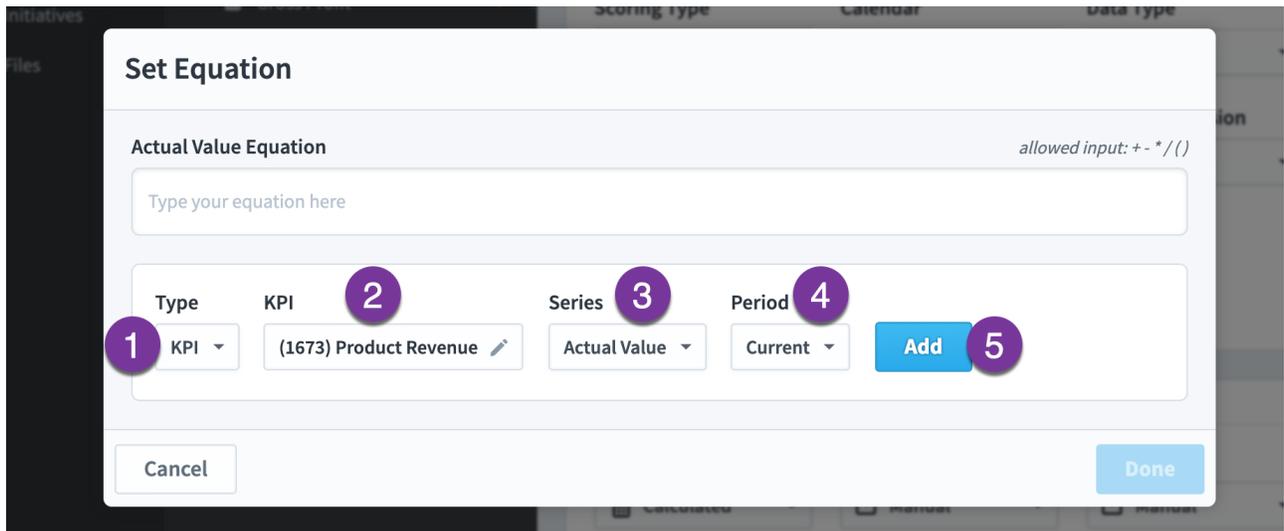
Next we're going to choose the KPI that we want to reference by clicking the *Select a KPI* button.



This stacks a second-level dialog where we choose the *Product Revenue* KPI.



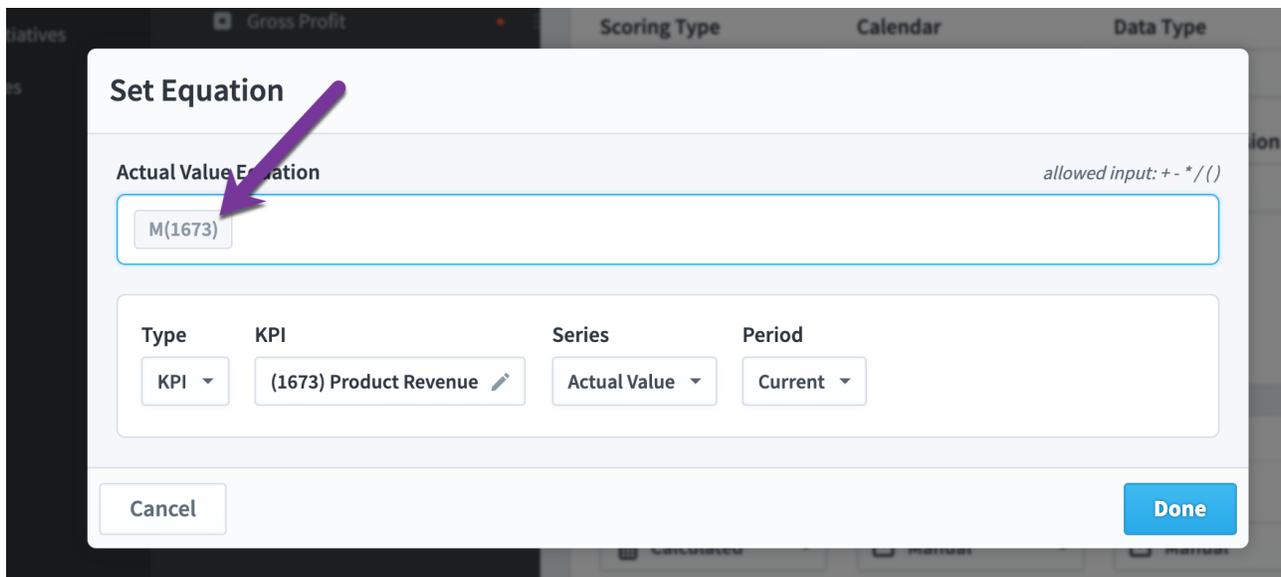
When we click *Done* and the second-level dialog closes, our equation builder now looks like this.



1. The item type is KPI. We'll explain below how to reference other things like Initiatives and Scores.

2. This is the *Product Revenue* KPI that we selected. If you want to change the item we're going to reference in the equation, just click this button again.
3. We're going to include *Product Revenue*'s actual value in the equation, but we could reference one of its thresholds like *Goal* instead.
4. We're going to include *Product Revenue*'s value for the current period, but we could choose earlier or later periods.
5. When we're ready to add the data to the equation, click this *Add* button.

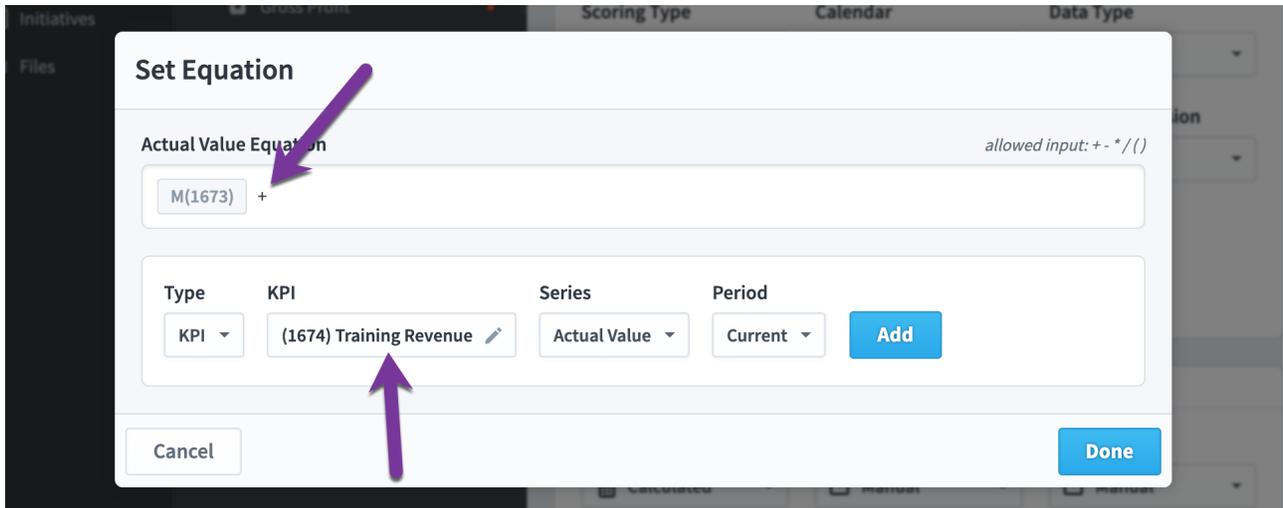
Once you add a reference to a KPI, it looks like this:



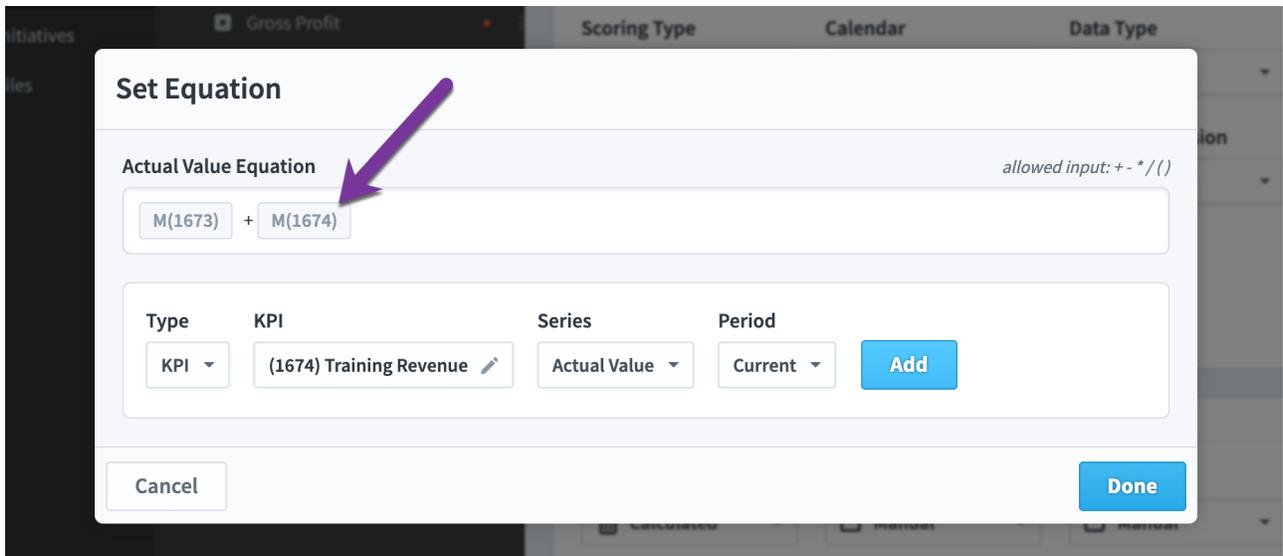
As you can see, the syntax for referencing another KPI value is:

```
M(kpi_id)
```

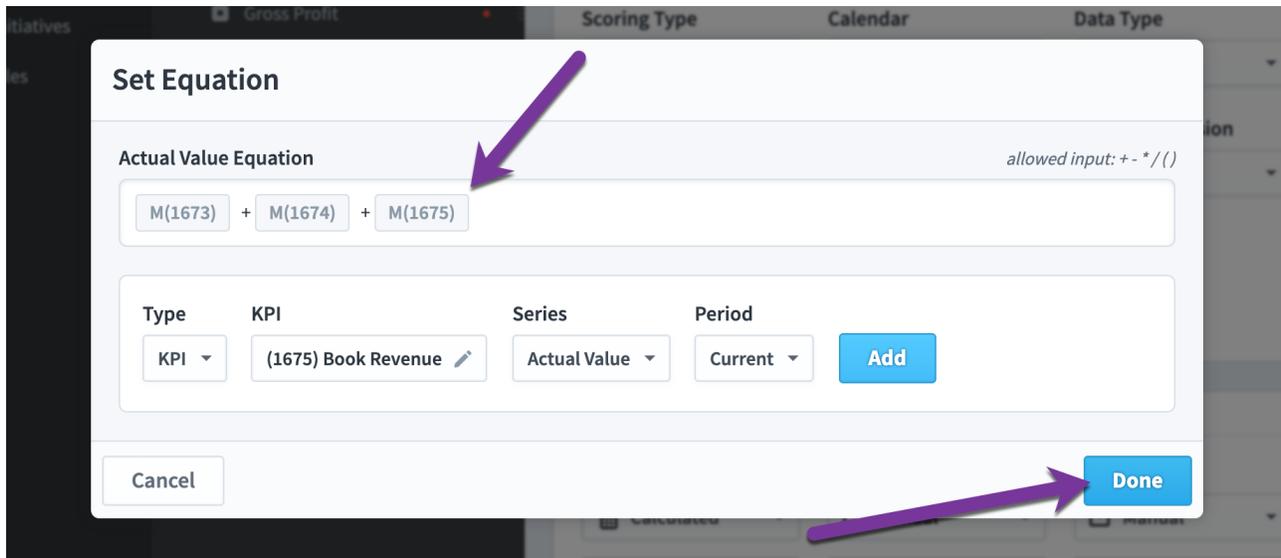
Now we'll type in a [space], a [+], and a [space], select the *Training Revenue* KPI in the second-level dialog...



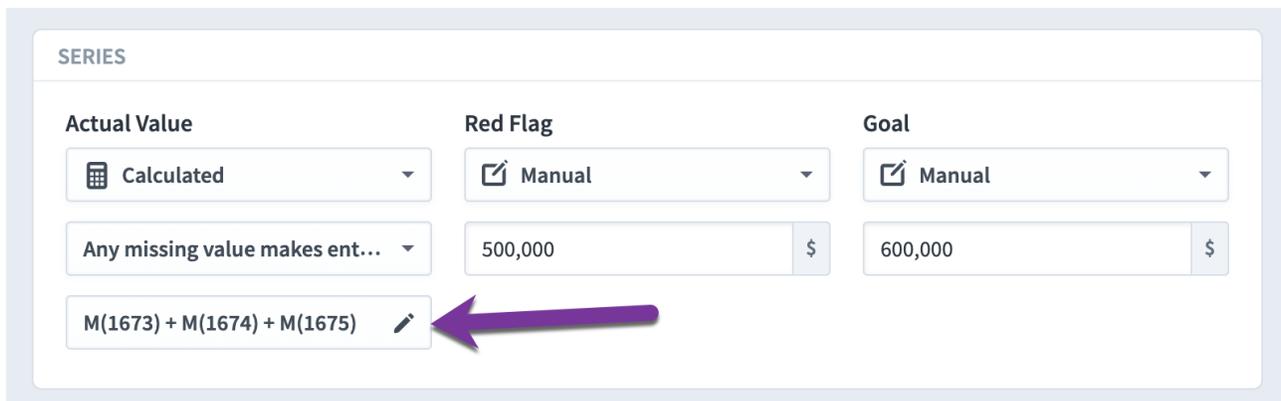
... and click *Add*.



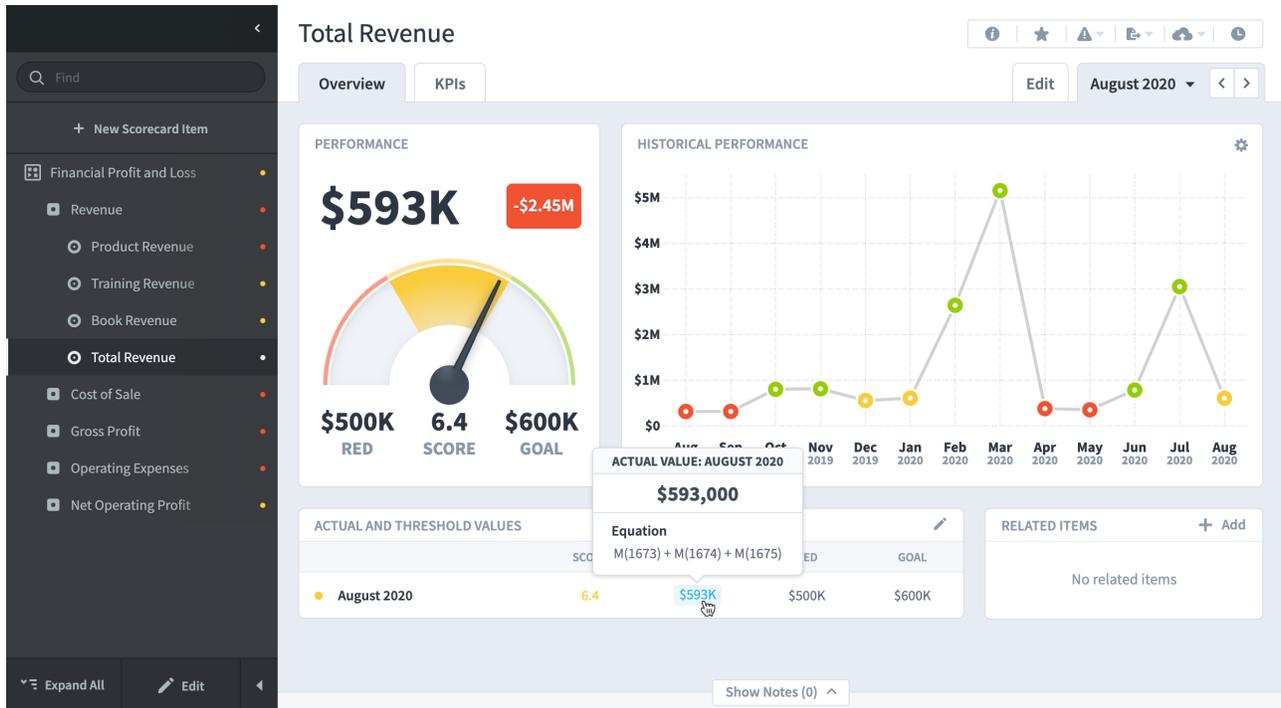
One more time and our equation is finished. Let's click *Done*.



Back on the Edit tab, our equation now shows up for the Actual Value series.



When we save the KPI and visit the Scorecards Overview tab, we can now see our calculated KPI in action.

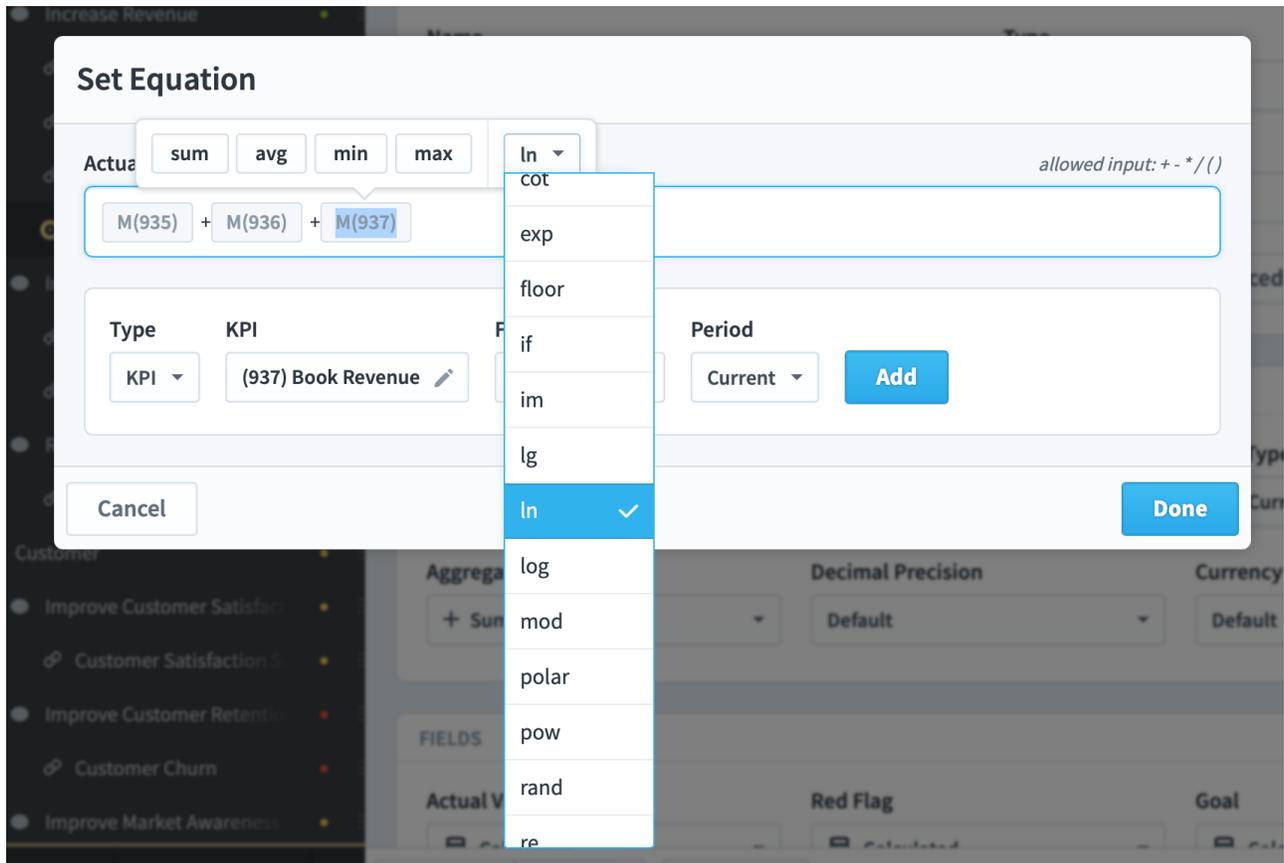


Common Equation Syntax

Later in this article is a comprehensive list of all functions and operators that you can use in your equations, but here are examples of some of the most commonly used syntax.

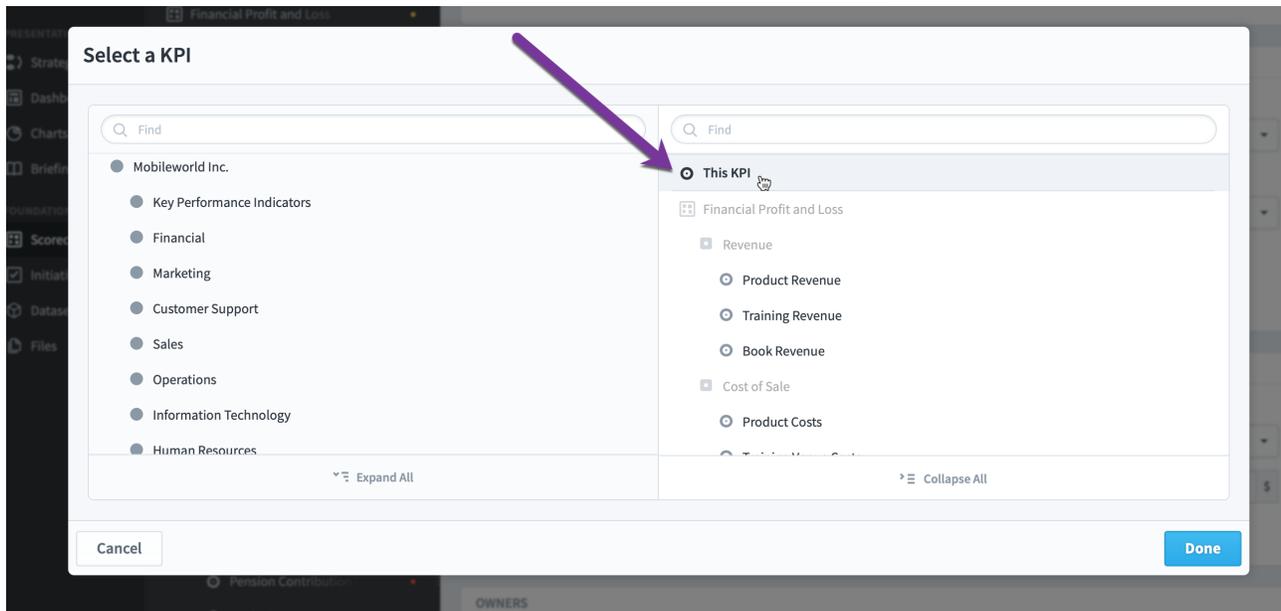
Most Common Formulas	Format
Sum	<code>sum(x, y, ...)</code>
Average	<code>avg(x1, x2, x3, ...)</code>
If	<code>if(condition, truevalue, falsevalue)</code>
Round	<code>round(x), round(x, decimal_places)</code>
To Date (YTD, QTD, etc.)	<code>TD(calendar, kpi_id, series, aggregation)</code>
Referencing a KPI (metric) value	<code>M(kpi_id)</code>
Referencing an Initiative Value	<code>I(field, initiative_id)</code>

If you select a block of text in your equation, a tooltip dialog will appear allowing you to wrap the selected text in a function.



Self-Referential Equations

You can also choose *This KPI* when building equations. This allows you to make self-referential equations, for example goals that are automatically 10% higher than the previous year's actual value.



To reference a KPI's own value, the syntax is simple:

```
M()
```

If you want to reference a KPI's own threshold (Red Flag), it looks like this:

```
T(Red Flag)
```

A KPI's own value for three periods earlier looks like this:

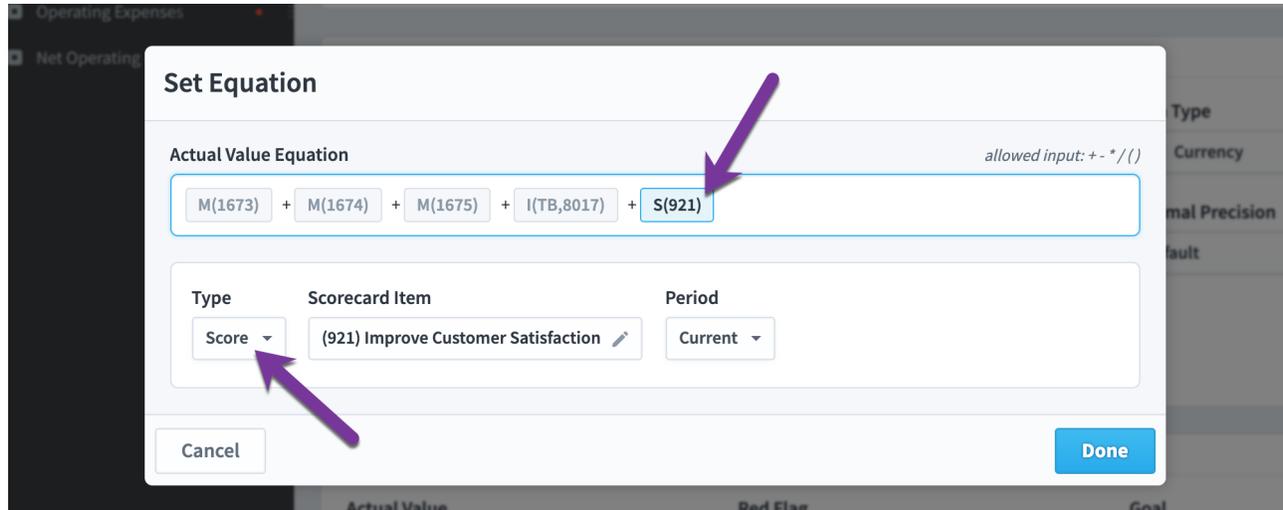
```
M(-3p)
```

Similarly, a KPI's own threshold (Goal) from three periods earlier looks like this:

```
T(Goal, -3p)
```

Referencing Scores

You can include the score from any scorecard item in your equation. Just select *Score* from the *Type* dropdown on the left.



This is the syntax for referencing the score for the current period for a scorecard item with an ID of 123 is:

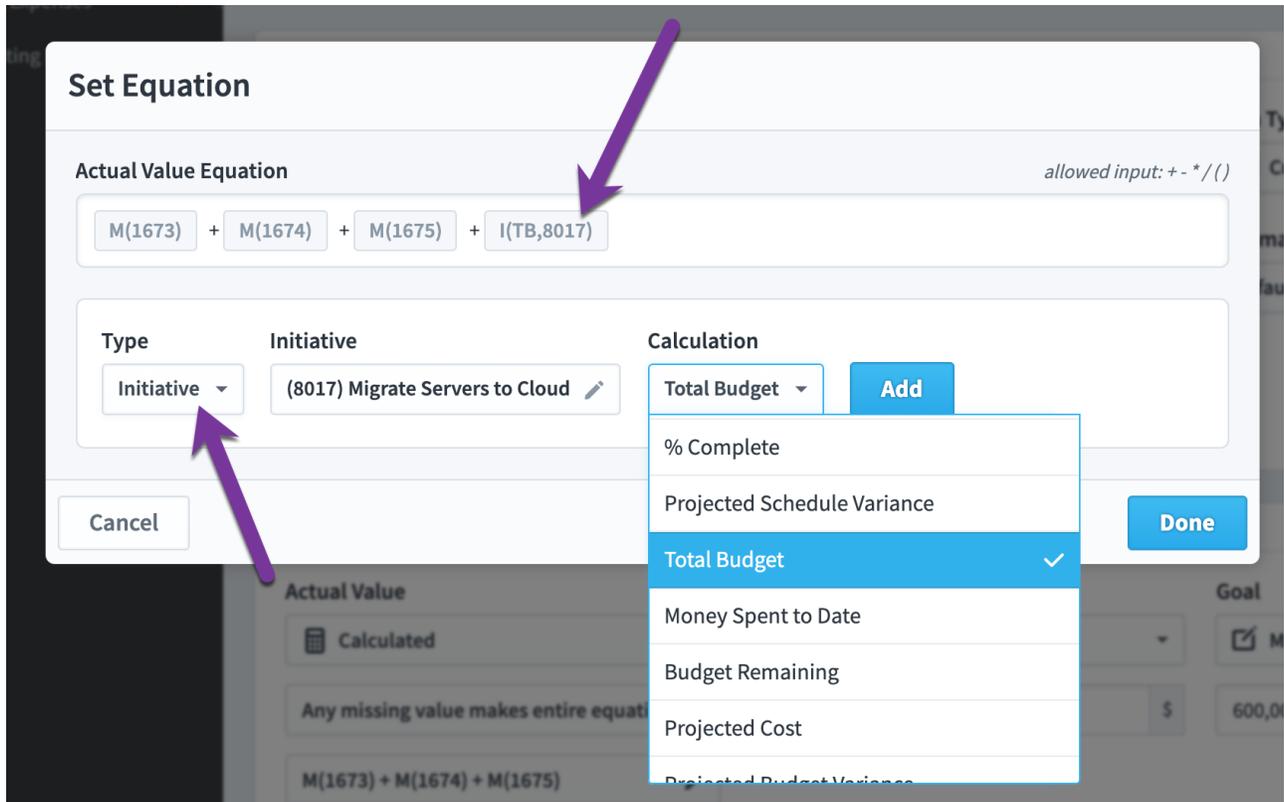
```
S(123)
```

The syntax for referencing a scorecard item's score in another period is similar. In this example, we're referencing the score from the previous period for item 123.

```
S(123, -1p)
```

Referencing Initiative Values

You can include values from Initiative items by selecting *Initiative* in the *Type* dropdown on the left. Here we're using the *Total Budget* from the *Migrate Servers to the Cloud* initiative in our equation.



The syntax when referencing an initiative value is:

```
I(field, initiative_id)
```

For example, to reference the budget remaining for initiative 123, the equation would be:

```
I(BR, 123)
```

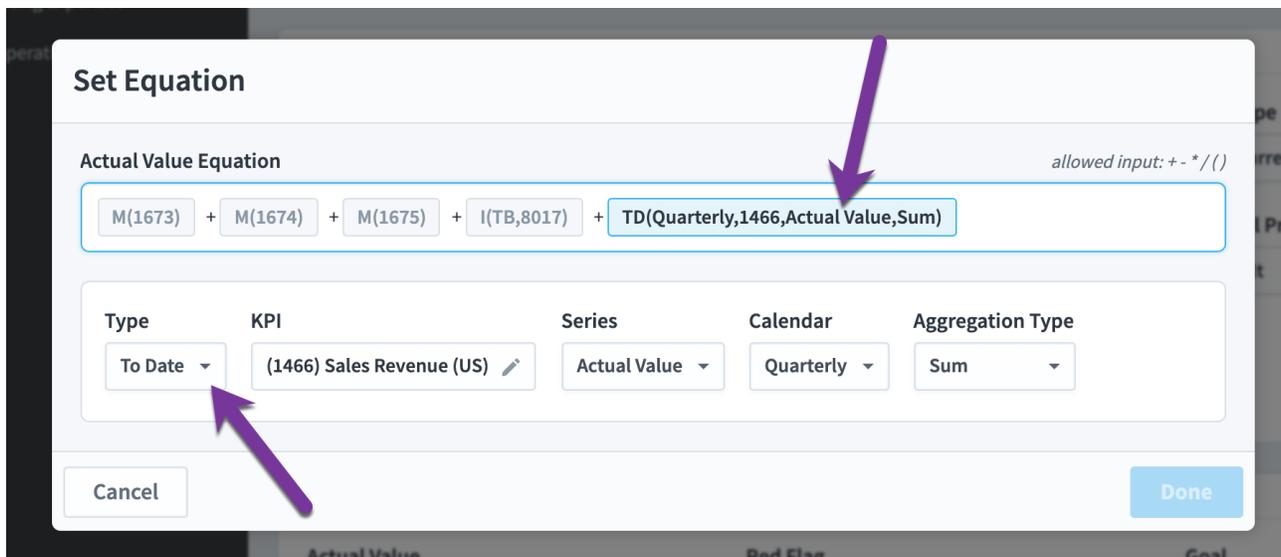
You can reference values for these initiative fields:

- **BR** – Budget Remaining
- **DE** – Days Elapsed
- **MSTD** – Money Spent to Date
- **PBV** – Projected Budget Variance

- **PBVP** – Projected Budget Variance Percentage
- **PC** – % Complete
- **PCOST** – Projected Cost
- **PSV** – Projected Schedule Variance
- **PTE** – % Time Elapsed
- **TB** – Total Budget

To-Date Function

By choosing *To Date* in the *Type* dropdown, you can build equations that aggregate values over time. The most popular use of the to-date function is calculating Year To Date values. In this example we're including the *Sales Revenue* quarterly sum.



The syntax for the to-date function is

```
TD(calendar, kpi_id, field, aggregation)
```

For example, if we wanted to do an average year-to-date for actual value of the KPI with an ID of 123, the equation would be:

```
TD(Yearly, 123, Actual Value, Average)
```

If/Else

The syntax for an IF statement is:

```
if(condition, truevalue, falsevalue)
```

Here's an example equation. "If the value for KPI #123 is 5, this equation returns 10. Otherwise return 0."

```
if(M(123) == 5, 10, 0)
```

Note that you'll need to use the double equal operator == when checking for an equal value, as explained below.

You can also string together multiple IF statements to create an IF/ELSE chain like this. "If the value for KPI #123 is 5, return 10. Else if the value for KPI #123 is 4, return 100. Else return 0."

```
if(M(123) == 5, 10, if( M(123) == 4, 100, 0))
```

Yes/No KPIs

Most KPIs have number for values, but Yes/No KPIs are different. These can be referenced as booleans (true/false) or as numbers (1/0).

In this example, we're referencing a Yes/No KPI's value in a number KPI's equation. "If the value for KPI #123 is yes, return 5. Else return 20"

```
if(M(123), 5, 20)
```

In this example, we're referencing a number KPI's value in a Yes/No KPI's equation.
"If the value for KPI #456 is greater than 7 return true. Else return false"

```
if(M(456) > 7, true, false)
```

This is the same as:

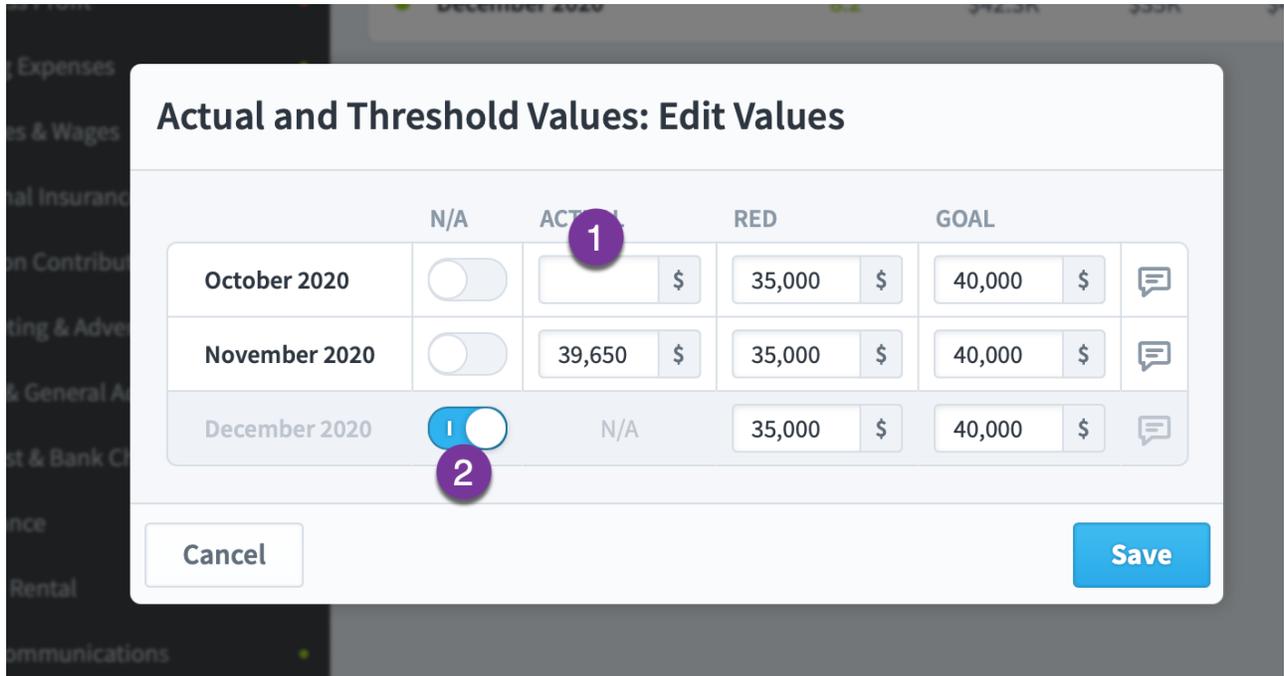
```
if(M(456) > 7, 1, 0)
```

Note that in the example above we're using 1 and 0, but any non-zero number will evaluate to Yes.

Blank (null) and Not Applicable (N/A)

In addition to their normal values, KPIs can also have values that are:

1. Blank (also called null).
2. Not Applicable (also called N/A). This is only available when the "Show N/A Option" is enabled in [Application Administration](#).



You can reference N/A and empty values using the `isnull` and `isna` functions like this:

```
if(isnull(M(123)), 5, 20)
```

and this:

```
if(isna(M(123)), 5, 20)
```

To set a value to empty, the equation would look like this:

```
if(M(123) > 8, null, 20)
```

Returning a N/A value would look like this:

```
if(M(123) > 8, na, 20)
```

Operators

Spider Impact supports a wide variety of operators in equations.

Operator	Symbol
Addition, Subtraction	+, -
Multiplication	*
Division	/
Not Equal, Equal	!=, ==
Power	^
Boolean Not	!
Unary Plus, Unary Minus	+x, -x
Modulus (remainder)	%
Less Than, Greater Than	<, >
Less or Equal, More or Equal	<=, >=
Boolean &	&&
Boolean Or	

Functions

This is a comprehensive list of all functions available in Spider Impact. Please see above for more information and examples about using the most popular functions.

Spider Impact Functions	Format
KPI's own value	M()

KPI's own threshold	T(field)
KPI's own value in another period (three earlier)	M(-3p)
KPI's own threshold in another period	T(field, -3p)
another KPI value	M(kpi_id)
another KPI threshold	T(kpi_id, field)
another KPI value in another period	M(kpi_id, -3p)
another KPI threshold in another period	T(kpi_id, field, -3p)
another scorecard item score	S(item_id)
another scorecard item score in another period	S(item_id, -3p)
initiative item's value (see above for list of fields)	I(field, initiative_id)
To-date aggregation (Sum or Average)	TD(calendar, kpi_id, field, aggregation)
Empty (null) value check	isnull(kpi_id)
N/A (not applicable) value check	isna(kpi_id)

Statistical Functions	Format
Average	avg(x1, x2, x3, ...)
Sum	sum(x1, x2, x3, ...)

Minimum	<code>min(x1, x2, x3, ...)</code>
Maximum	<code>max(x1, x2, x3, ...)</code>

Rounding Functions	Format
Round (round up when tied)	<code>round(x), round(x, decimal_places)</code>
Round (round to even value when tied)	<code>rint(x), rint(x, decimal_places)</code>
Floor	<code>floor(x)</code>
Ceiling	<code>ceil(x)</code>

Other Common Functions	Format
Str (convert number to a string)	<code>str(x)</code>
Absolute Value / Magnitude	<code>abs(x)</code>
Random Number (between 0 and 1)	<code>rand()</code>
Modulus (remainder when x is divided by y)	<code>mod(x,y)</code>
Square Root	<code>sqrt(x)</code>
Binomial coefficients	<code>binom(n, i)</code>
Signum (-1,0,1 depending on sign of argument)	<code>signum(x)</code>

Trigonometric Functions	Format
Sine	$\sin(x)$
Cosine	$\cos(x)$
Tangent	$\tan(x)$
Arc Sine	$\text{asin}(x)$
Arc Cosine	$\text{acos}(x)$
Arc Tangent	$\text{atan}(x)$
Arc Tan with 2 parameters	$\text{atan2}(y, x)$
Secant	$\text{sec}(x)$
Cosecant	$\text{cosec}(x)$
Co-tangent	$\text{cot}(x)$
Hyperbolic Sine	$\sinh(x)$
Hyperbolic Cosine	$\cosh(x)$
Hyperbolic Tangent	$\tanh(x)$
Inverse Hyperbolic Sine	$\text{asinh}(x)$
Inverse Hyperbolic Cosine	$\text{acosh}(x)$
Inverse Hyperbolic Tangent	$\text{atanh}(x)$

Log and Exponential	Format
Natural Logarithm	$\ln(x)$
Logarithm base 10	$\log(x)$
Logarithm base 2	$\lg(x)$
Exponential (e^x)	$\exp(x)$
Power	$\text{pow}(x)$

Exploring How a KPI is Calculated

Introduction

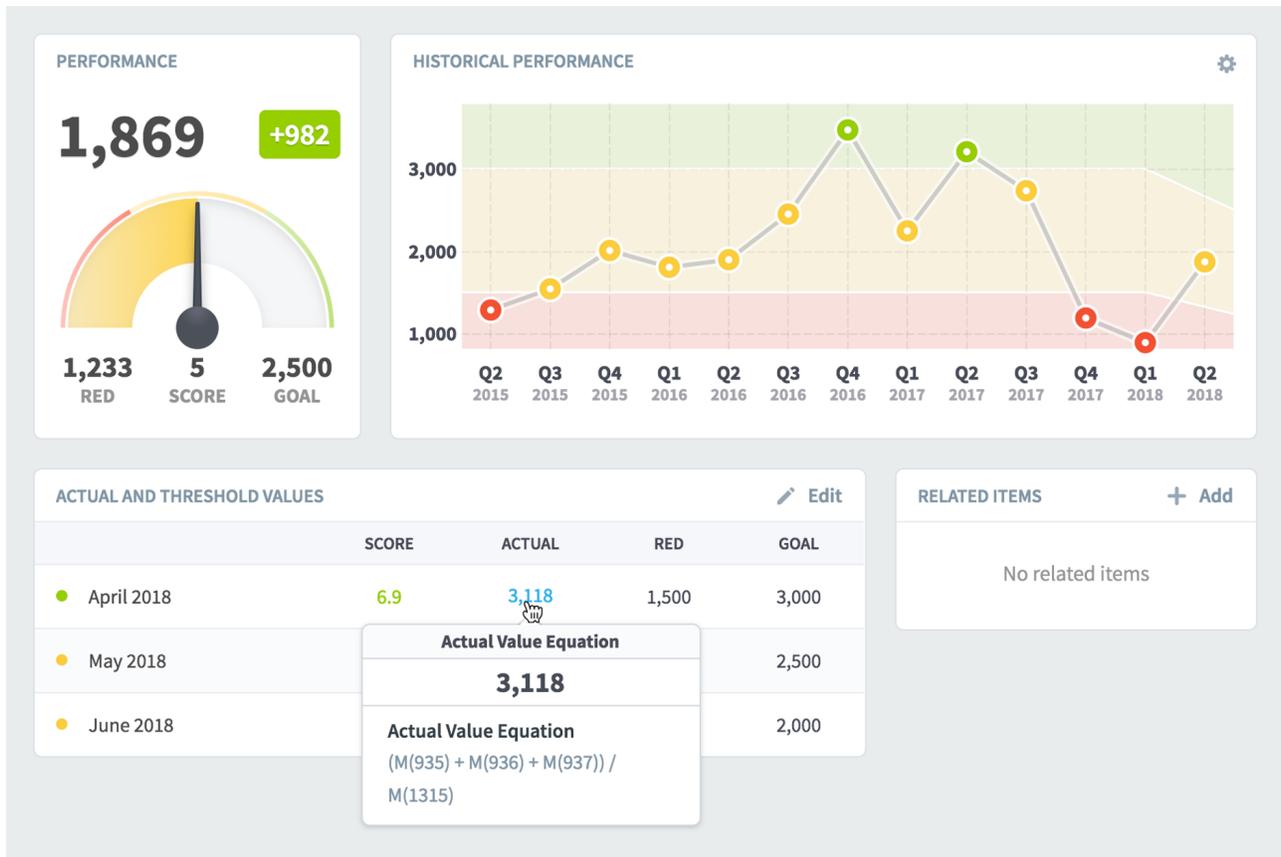
Spider Impact is great at calculating KPI values and aggregating them over time and across organizations. It's important for everyone in your organization to have complete faith in how a number was calculated, however, and Spider Impact shows its work.

For example, it can sometimes be difficult to understand the nuanced differences between aggregation types like "sum" and "use equation." Although this explanation gets a little technical, don't worry, Spider Impact is easier to use than ever. The big take-away here is that that you can hover your mouse over a number on the Scorecards Overview tab to see how it was calculated.

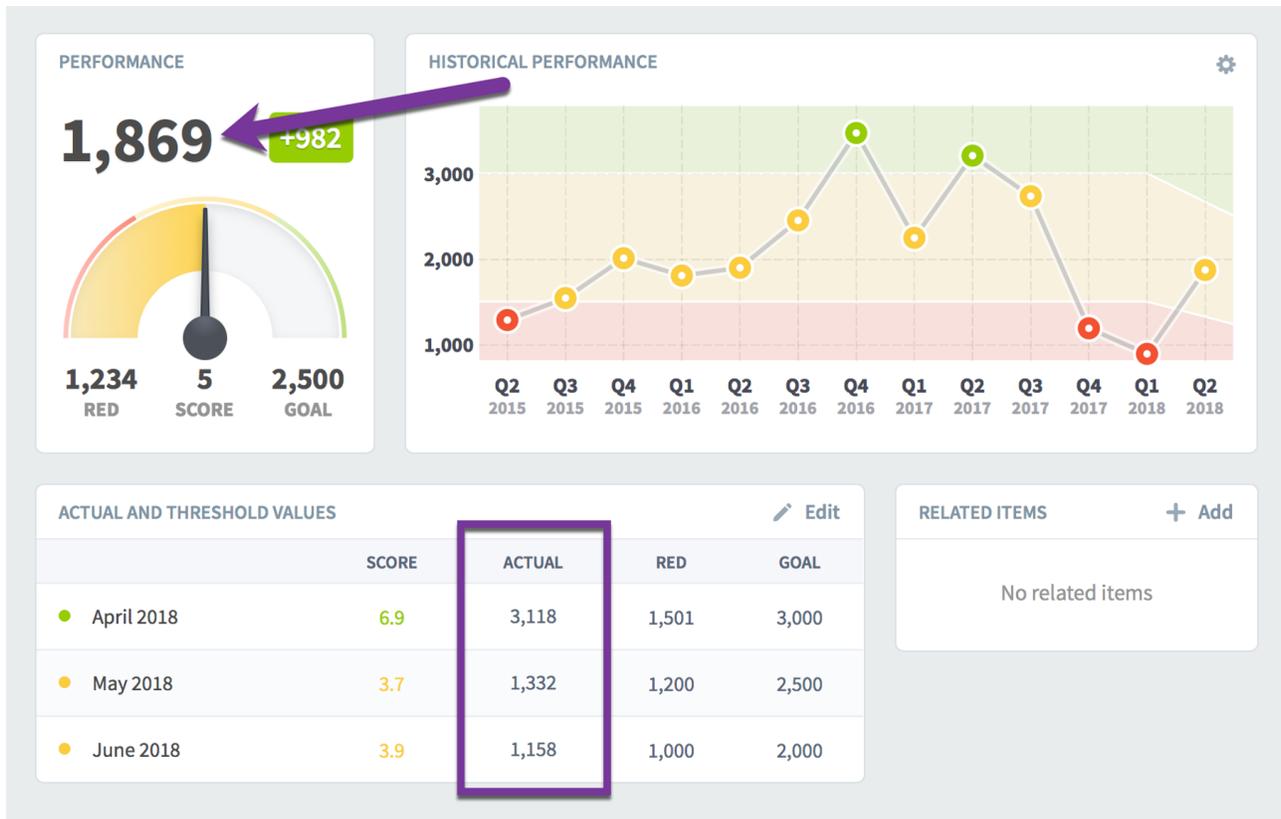
Exploring KPI Calculations

On the Scorecards Overview tab there is an "Actual and Threshold Values" table that shows you all of the KPI values and thresholds that go into the currently selected KPI, regardless of whether those values are calculated or not. You can interact with these numbers to see where they come from.

In this example, we're looking at a monthly KPI in quarterly mode. The KPI's aggregation type is average, so its quarterly total of 1,869 was determined by averaging its three monthly values listed in the "actual and threshold values" table.



If you hover your mouse over the April 2018 monthly values, you can now see that it's based on an equation using the values of four other KPIs.



If you want to explore further, just click the monthly number that you're hovering over. This shows a dialog containing both the original equation and a version of the equation with April 2018 actual values substituted for the KPI references. When you hover over individual parts of the equation, there's a tooltip telling you the name of that KPI, and its corresponding actual value is highlighted below.

Data Used in Calculations

ACTUAL VALUE EQUATION

Any missing value: Number of Customers blank

$(M(935) + M(936) + M(937)) / M(1315)$

APRIL 2018 ACTUAL VALUES

$(908K + 900K + 44K) / 594 = 3,118$

Close

Finally, you can click on any of these KPI references to go to that KPI's Scorecard Overview tab. By doing this, you can trace down complicated nested equations to find out exactly where a calculated number comes from.

Instead, we'll edit our original KPI to show how the software visualizes different aggregation types. We'll change the calculated aggregation type from "average" to "use equation."

MEASURE DETAILS

Scoring Type: Goal/Red Flag

Calendar: Monthly

Data Type: # Number

Manual Aggregation Type: Average

Calculated Aggregation Type: Use Equation (selected)

Decimal Precision: Default

Units:

Now when we go back to the Overview tab, things look different in the "actual and threshold values" box. The goal and red flag thresholds are manually updated for this monthly KPI, so they're still in monthly rows. But, a single quarterly actual value is now listed on top rather than separate actual values for every month.

PERFORMANCE

1,765 +864

1,234 RED 4.7 SCORE 2,500 GOAL

HISTORICAL PERFORMANCE

ACTUAL AND THRESHOLD VALUES Edit

Actual Value Quarter 2, 2018 = 1,765

	SCORE	RED	GOAL
● April 2018	6.9	1,501	3,000
● May 2018	3.7	1,200	2,500
● June 2018	3.9	1,000	2,000

RELATED ITEMS + Add

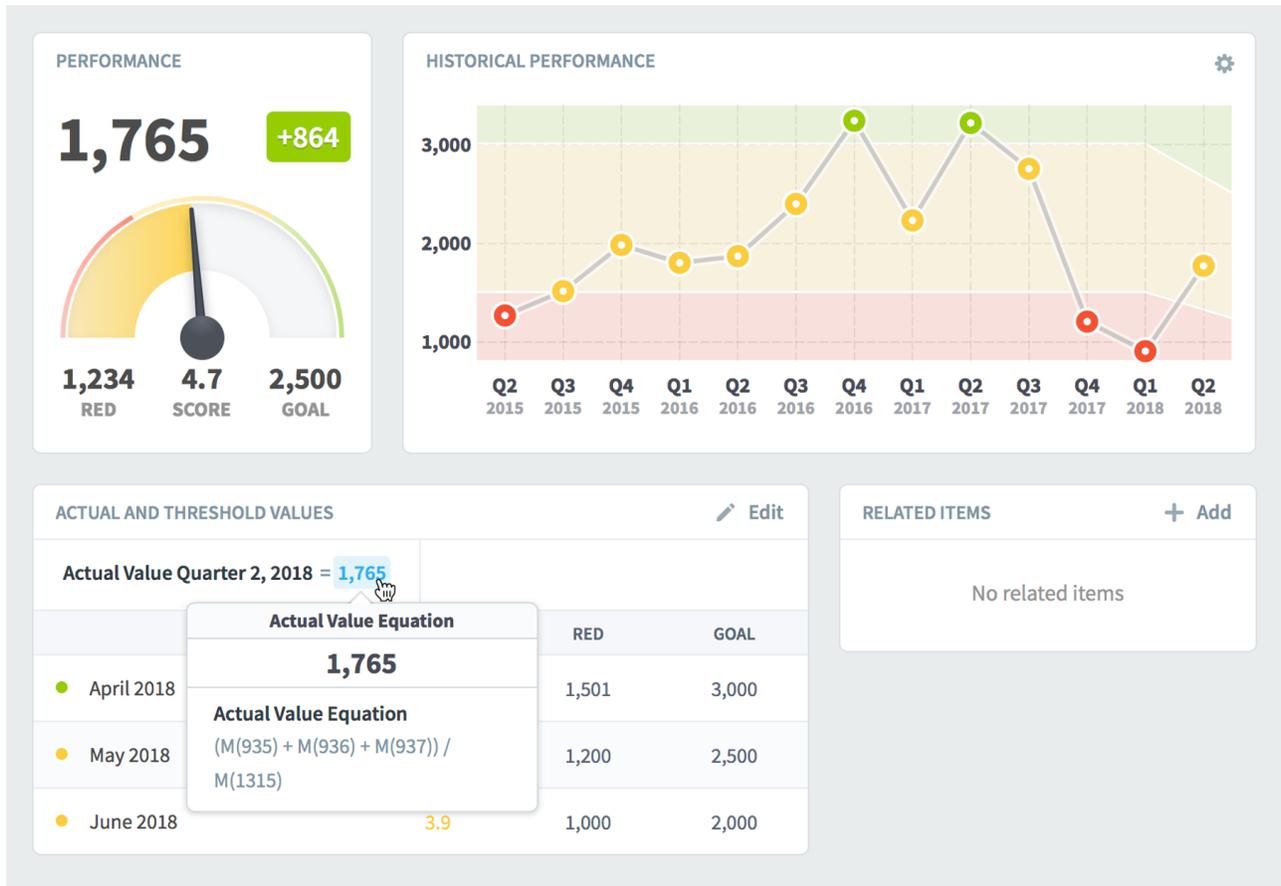
No related items

That's because when we changed the calculated aggregation type, the software calculates the KPI's quarterly value differently.

As we saw earlier, this KPI's actual value is calculated, and its calculated aggregation type is now "use equation" rather than "average." The "average" aggregation type calculated each of this KPI's monthly values and then averaged them. The "use equation" aggregation type does things in the opposite order. It first calculates the quarterly values for every KPI referenced in the equation, and then plugs those values into the equation.

Long story short, this KPI's monthly values aren't directly used to determine its quarterly value anymore, so the software doesn't show those monthly values in the table.

Just like before, when we hover over the calculated value, we can see its equation in the tooltip.



And, like before, clicking on the calculated number shows a dialog. This time, however, the equation is using quarterly values rather than monthly. You can see that each of the KPIs in the equation have first been aggregated on their own, because their Quarter 2 values are used in the equation.

Data Used in Calculations

ACTUAL VALUE EQUATION: AVERAGE REVENUE PER CUSTOMER

Any missing value Number of Customers blank

$$(M(935) + M(936) + M(937)) / M(1315)$$

QUARTER 2, 2018 ACTUAL VALUES

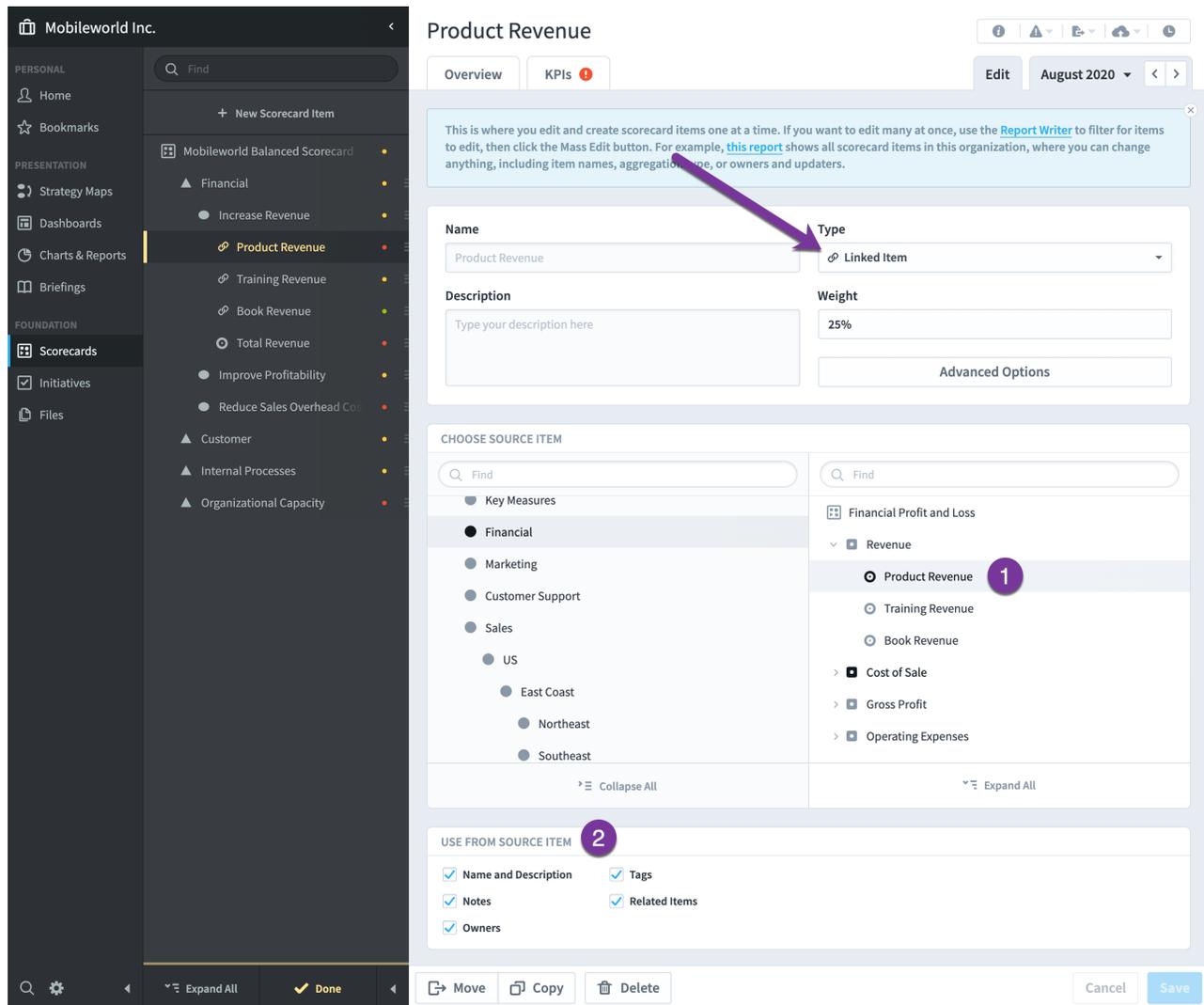
$$(918K + 2.69M + 132K) / 2,120 = 1,765$$

Close

Linked Scorecard Items

One of the scorecard item types that you can choose is Linked Item. This allows you to add a copy of an existing scorecard item to your scorecard. For example, you may want to reuse a KPI that's already being tracked in another organization, or maybe you want to create a theme scorecard that includes objectives from other organizations.

Whenever that source item is updated with new KPI values or scores, that information will instantly be reflected in your linked item.



There are two things that make linked items unique from other scorecard items.

1. You need to choose where the source item is. In this example we're choosing the "Product Revenue" KPI from the "Financial" organization.
2. You need to choose what to pull from the source item. It's always going to reuse things like scores, actual values, and thresholds because that's the point of a linked item. But, you can choose to override things like the item's Name, or you can decide to not share Notes with the source item.

Editing Multiple Scorecard Items at Once

The mass-edit feature that is built into the Report Writer allows you to edit multiple scorecards at once, and it can save you a lot of time. In this example we're going to find all of the red KPIs and then assign our helpdesk team as their owners.

The first step is to create a new report showing all KPIs that are red for the current period. Before we save the report, we can now see a "Mass Edit" button on the bottom of the screen.

The screenshot shows the 'Report Writer' interface for 'Mobileworld Inc.'. On the left is a sidebar with a search bar and a list of reports including 'Red Measures Report', 'Report Writer', 'Scorecard Item Owner/Updater Report', 'Measure Comparison Report', 'Financial Overview Report', 'Sales Overview Report', 'Marketing Overview Report', 'HQ Scorecard', and 'Scorecard Structure Report'. The main area displays a table with columns for NAME, ORGANIZATION, OWNERS, and MAY 2018. A purple arrow points to the 'Mass Edit' button at the bottom right of the table. Below the table, there is a message: 'You haven't saved this report yet'.

NAME	ORGANIZATION	OWNERS	MAY 2018
Product Revenue	Financial	Nora Roberts	\$50
Product Costs	Financial	Joe Abercrombie	\$278K
Total Costs	Financial		\$327K
Pension Contribution (3%)	Financial		\$7,438
Marketing & Advertising	Financial	David Baldacci	\$63K
Interest & Bank Charges	Financial		\$15.6K
Office Rental	Financial	Brandon Sanderson	\$51.6K
IT & Communications	Financial		\$35.9K
Travel	Financial		\$15.5K
Twitter Mentions	Marketing		0
Facebook Likes	Marketing		266
% Calls answered	Customer Support		91.7%
Customer Satisfaction Survev	Customer Support	Clive Keyte	89.1%

When you click the "Mass Edit" button, a column of checkboxes appears on the left. You can choose individual scorecard items that you want to edit, or you can click the dark checkbox on the top to select all of them. When you're done, click "Edit Selected Items."

Mobileworld Inc. Report Writer

ME Edit May 2018 < >

+ New Report New Folder

VIEW

- Red Measures Report
- Report Writer
- Red Measures Report
- Scorecard Item Owner/Updater Report

DATA

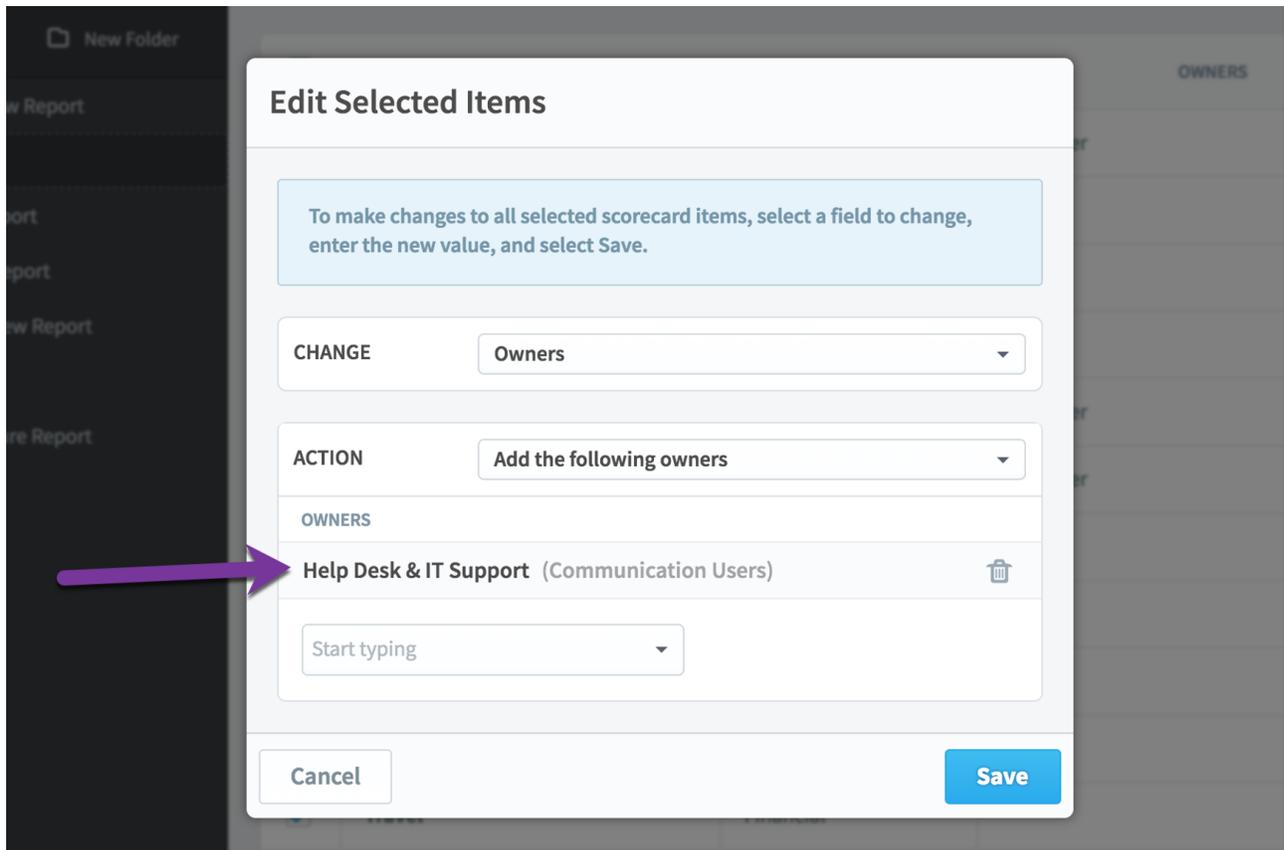
- Measure Comparison Report
- Financial Overview Report
- Sales Overview Report
- Marketing Overview Report
- HQ Scorecard
- Scorecard Structure Report

Expand All Edit You haven't saved this report yet

<input checked="" type="checkbox"/>	NAME	ORGANIZATION	OWNERS	MAY 2018
<input checked="" type="checkbox"/>	Product Revenue	Financial	Nora Roberts	\$50
<input checked="" type="checkbox"/>	Product Costs	Financial	Joe Abercrombie	\$278K
<input checked="" type="checkbox"/>	Total Costs	Financial		\$327K
<input checked="" type="checkbox"/>	Pension Contribution (3%)	Financial		\$7,438
<input checked="" type="checkbox"/>	Marketing & Advertising	Financial	David Baldacci	\$63K
<input checked="" type="checkbox"/>	Interest & Bank Charges	Financial		\$15.6K
<input checked="" type="checkbox"/>	Office Rental	Financial	Brandon Sanderson	\$51.6K
<input checked="" type="checkbox"/>	IT & Communications	Financial		\$35.9K
<input checked="" type="checkbox"/>	Travel	Financial		\$15.5K
<input checked="" type="checkbox"/>	Twitter Mentions	Marketing		0
<input checked="" type="checkbox"/>	Facebook Likes	Marketing		266
<input checked="" type="checkbox"/>	% Calls answered	Customer Support		91.9%
<input checked="" type="checkbox"/>	Customer Satisfaction Survey	Customer Support	Clive Keyte	89.1%

[Edit Selected Items](#) [Done](#)

This brings up a dialog where you can choose to edit any property of the selected items. You literally change anything, including name, description, and scoring type. In this example we've decided to add the "Help Desk & IT Support" group as Owners.



When we click "Save," we see a message on top saying that the scorecard items have been edited, but the report hasn't been updated yet to reflect the changes. That's because sometimes you'll want to make additional changes to those same scorecard items, but the edits you make can change what items show up in the report.

Report Writer

Overview Edit May 2018 < >

110 objects successfully modified.
Your report hasn't been updated yet to show the changes you just made. When you're done editing, click Done to refresh the report and show the latest data.

<input checked="" type="checkbox"/>	NAME	ORGANIZATION	OWNERS	MAY 2018
<input checked="" type="checkbox"/>	Product Revenue	Financial	Nora Roberts	\$50
<input checked="" type="checkbox"/>	Product Costs	Financial	Joe Abercrombie	\$278K
<input checked="" type="checkbox"/>	Total Costs	Financial		\$327K
<input checked="" type="checkbox"/>	Pension Contribution (3%)	Financial		\$7,438
<input checked="" type="checkbox"/>	Marketing & Advertising	Financial	David Baldacci	\$63K
<input checked="" type="checkbox"/>	Interest & Bank Charges	Financial		\$15.6K
<input checked="" type="checkbox"/>	Office Rental	Financial	Brandon Sanderson	\$51.6K
<input checked="" type="checkbox"/>	IT & Communications	Financial		\$35.9K
<input checked="" type="checkbox"/>	Travel	Financial		\$15.5K
<input checked="" type="checkbox"/>	Twitter Mentions	Marketing		0

Expand All Edit You haven't saved this report yet Edit Selected Items Done

Once you click "Done" it will re-run the report, showing your updated results. You can see here that we've now added the Help Desk group as the owner to all of the red KPIs.

Mobileworld Inc.

ME

Find

+ New Report New Folder

VIEW

- Red Measures Report
- Report Writer
- Red Measures Report
- Scorecard Item Owner/Updater Report
- Measure Comparison Report

DATA

- Financial Overview Report
- Sales Overview Report
- Marketing Overview Report
- HQ Scorecard
- Scorecard Structure Report

Expand All Edit

Report Writer

Overview Edit May 2018

NAME	ORGANIZATION	OWNERS	MAY 2018
Product Revenue	Financial	Nora Roberts Help Desk & IT Support (Communication Users)	\$50
Product Costs	Financial	Joe Abercrombie Help Desk & IT Support (Communication Users)	\$278K
Total Costs	Financial	Help Desk & IT Support (Communication Users)	\$327K
Pension Contribution (3%)	Financial	Help Desk & IT Support (Communication Users)	\$7,438
Marketing & Advertising	Financial	David Baldacci Help Desk & IT Support (Communication Users)	\$63K
Interest & Bank Charges	Financial	Help Desk & IT Support (Communication Users)	\$15.6K
Office Rental	Financial	Brandon Sanderson Help Desk & IT Support (Communication Users)	\$51.6K
IT & Communications	Financial	Help Desk & IT Support (Communication Users)	\$35.9K
Travel	Financial	Help Desk & IT Support (Communication Users)	\$15.5K
Twitter Mentions	Marketing	Help Desk & IT Support (Communication Users)	0
Facebook Likes	Marketing	Help Desk & IT Support (Communication Users)	266
% Calls answered	Customer Support	Help Desk & IT Support (Communication Users)	91.90%

Note: A purple arrow points from the top of the page to the 'OWNERS' column of the first row.

Information icon: You haven't saved this report yet

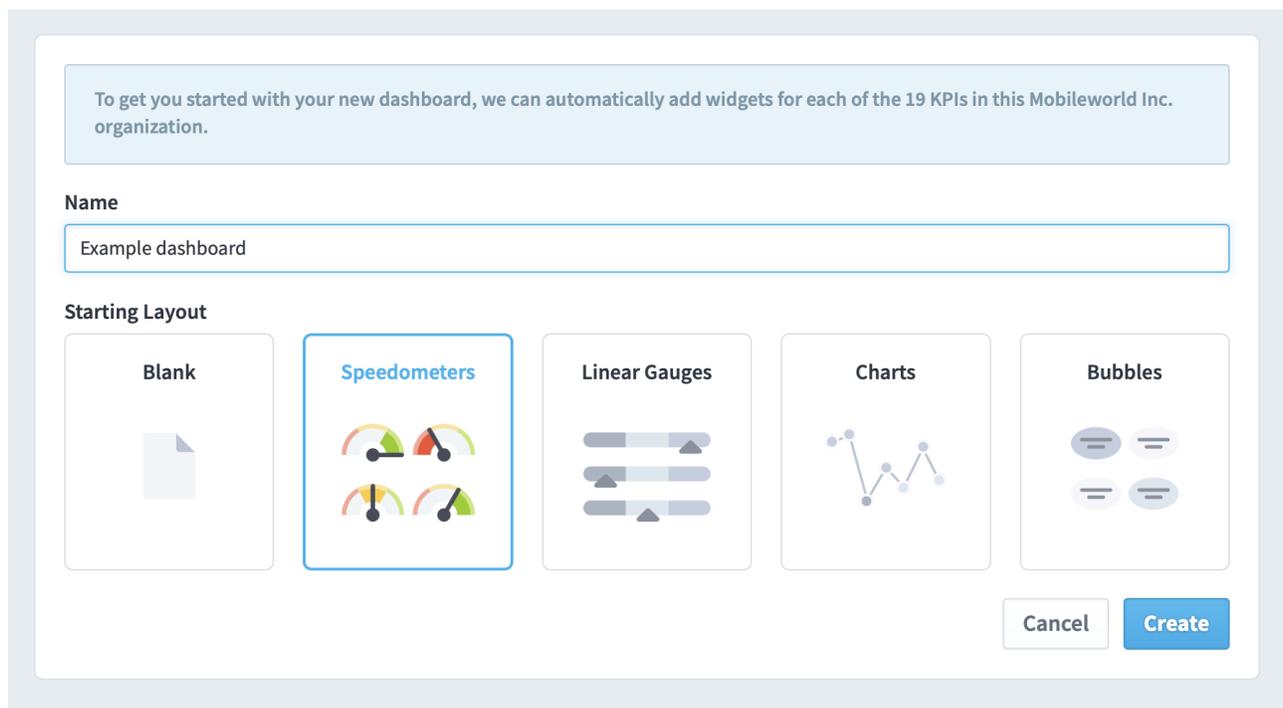
Mass Edit Save

Dashboards

Building Dashboards

Creating a Dashboard

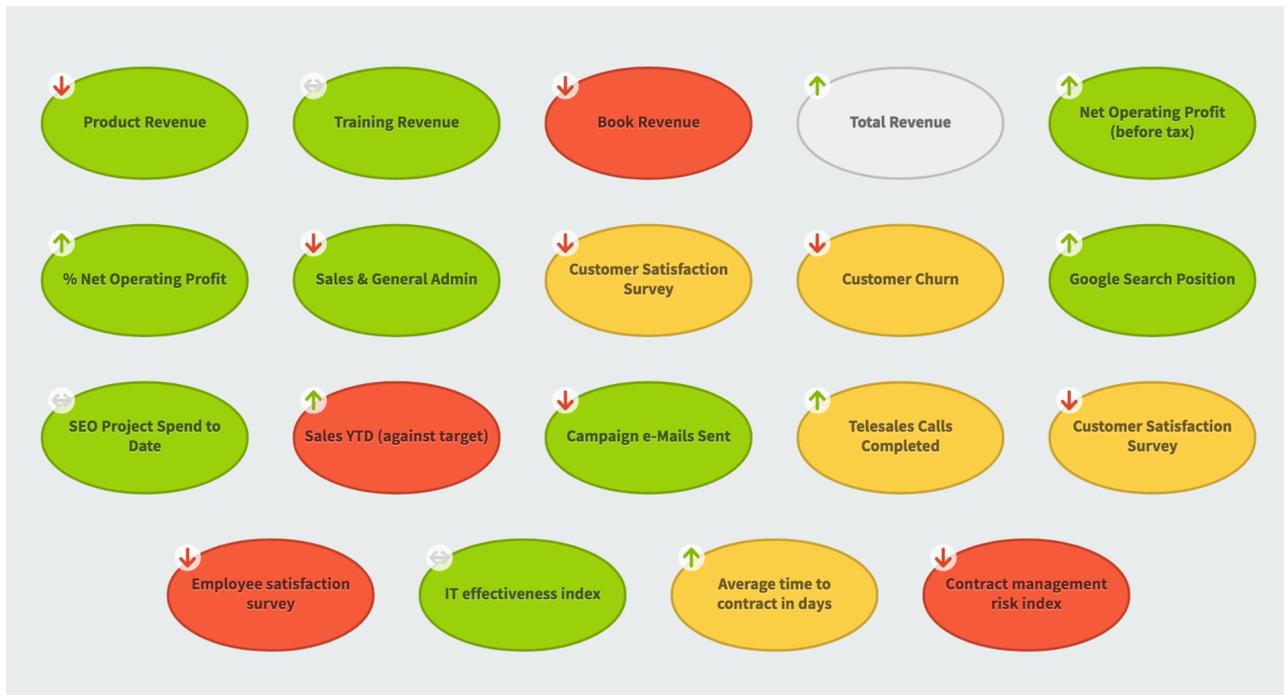
New dashboards default to Blank, but you also have the option to automatically add widgets for each KPI in the organization. This can be a great starting point for building KPI dashboards.



In this example, we've selected speedometers, and when you click "create," the new dashboard starts with a speedometer for every KPI in the organization.

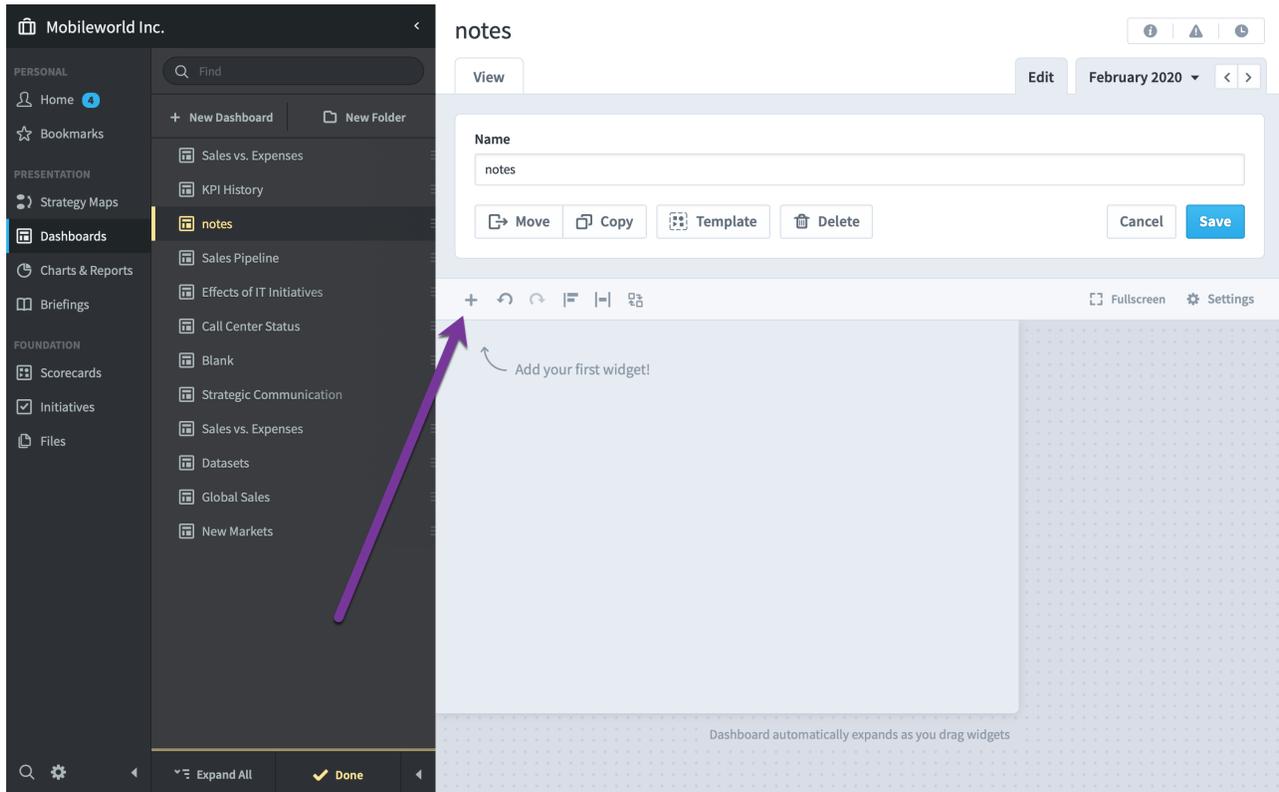


This is what the dashboard would have looked like if we had chosen bubbles.

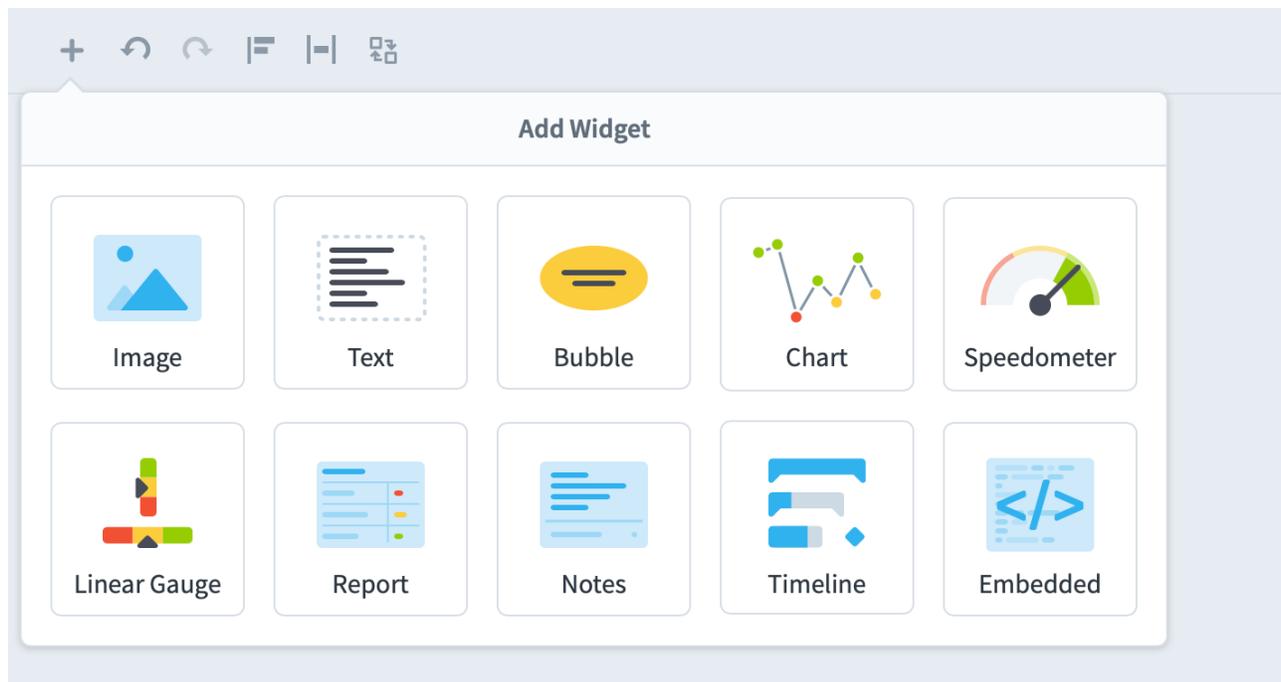


Adding Widgets

To add a widget, click the *Add Widget* button in the button row.



This shows the *Add Widget* menu, where you can choose what you want to add to your dashboard.



Each type of widget has unique configuration options, many of which are discussed in separate articles.

- [Image](#)
- [Text](#)
- Bubble
- [Chart](#)
- Speedometer and Linear Gauge
- [Report](#)
- [Notes](#)
- Timeline
- [Embedded](#)

Arranging Widgets

Editing a dashboard is a lot like editing a PowerPoint slide. You can drag and resize dashboard widgets to create any layout you want. See the [Widget Spacing, Alignment, and Sizing](#) article for more information.

\$25.1K



Travel

\$31.9K



\$12.9K

National Insurance



Insurance

\$74.6K



Marketing & Advertising

\$44.1K



Amortisation & Depreciation

\$151K



Salaries & Wages

\$69.5K



IT & Communications

\$55.8K



Sales & General Admin

\$58.8K



Office Rental

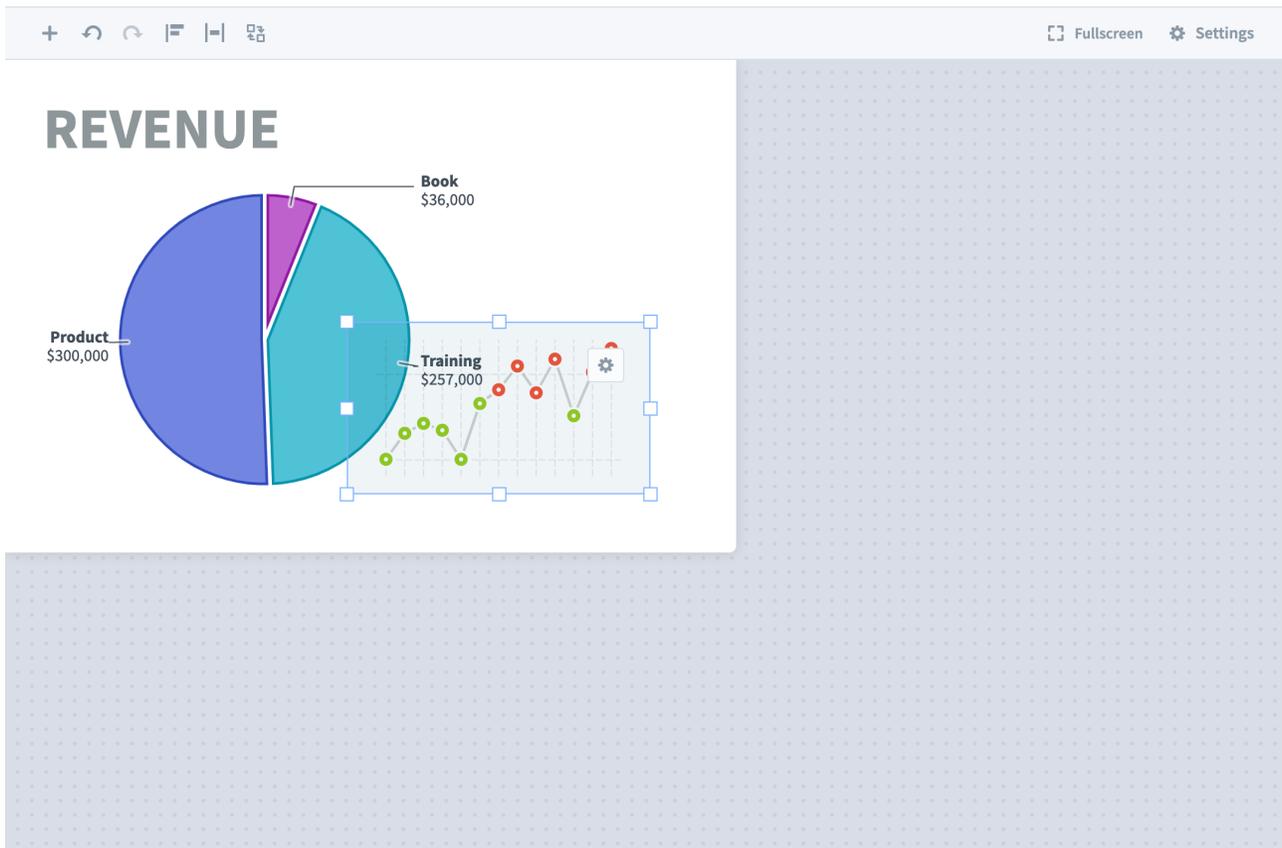
\$4,807



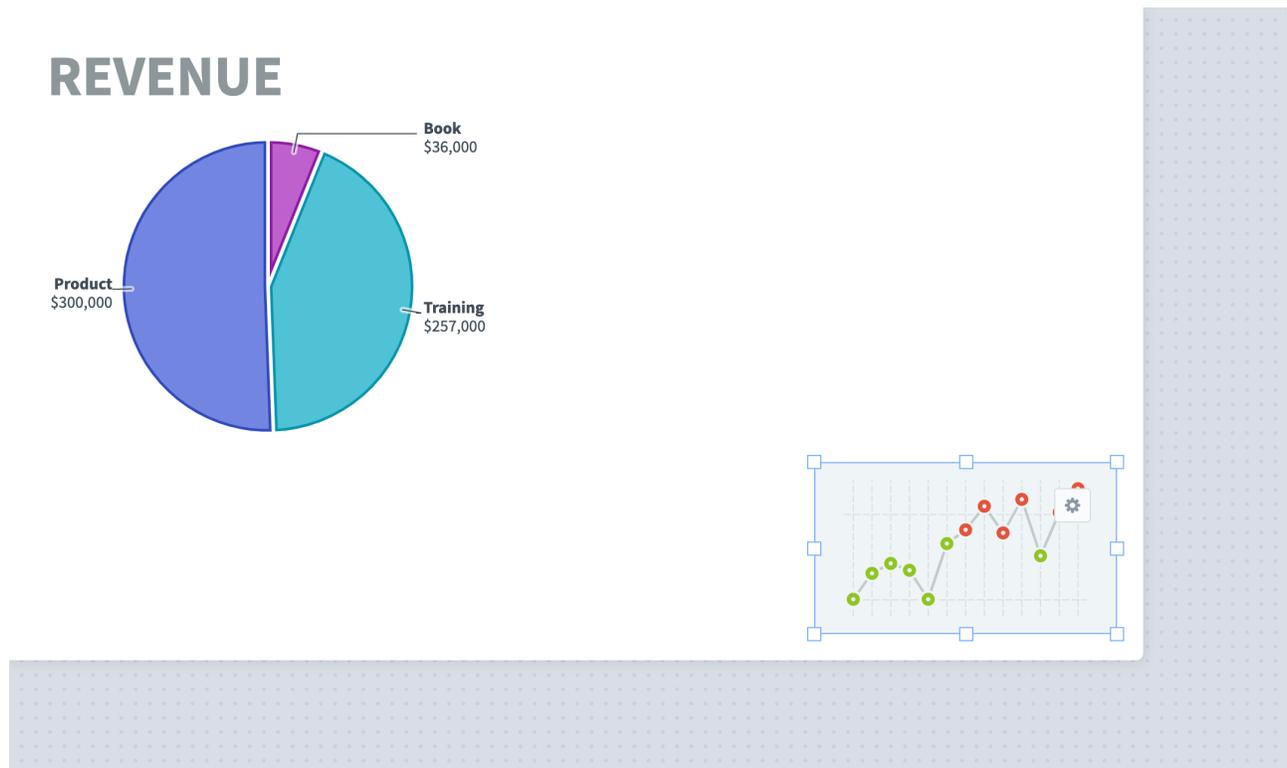
Interest & Bank Charges

Automatically Resizing Canvas

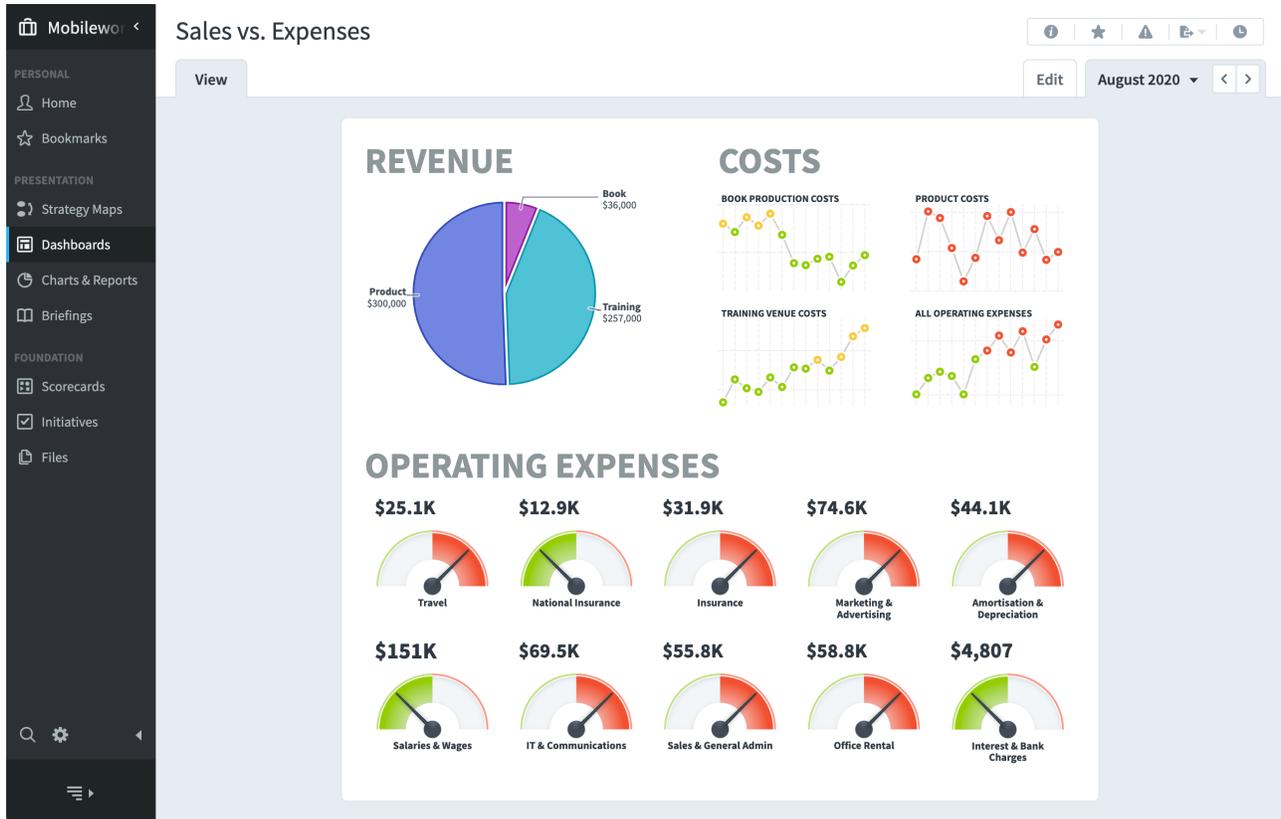
Your dashboard canvas will automatically expand as wide as you want it to be. For example, we can start dragging this chart here:



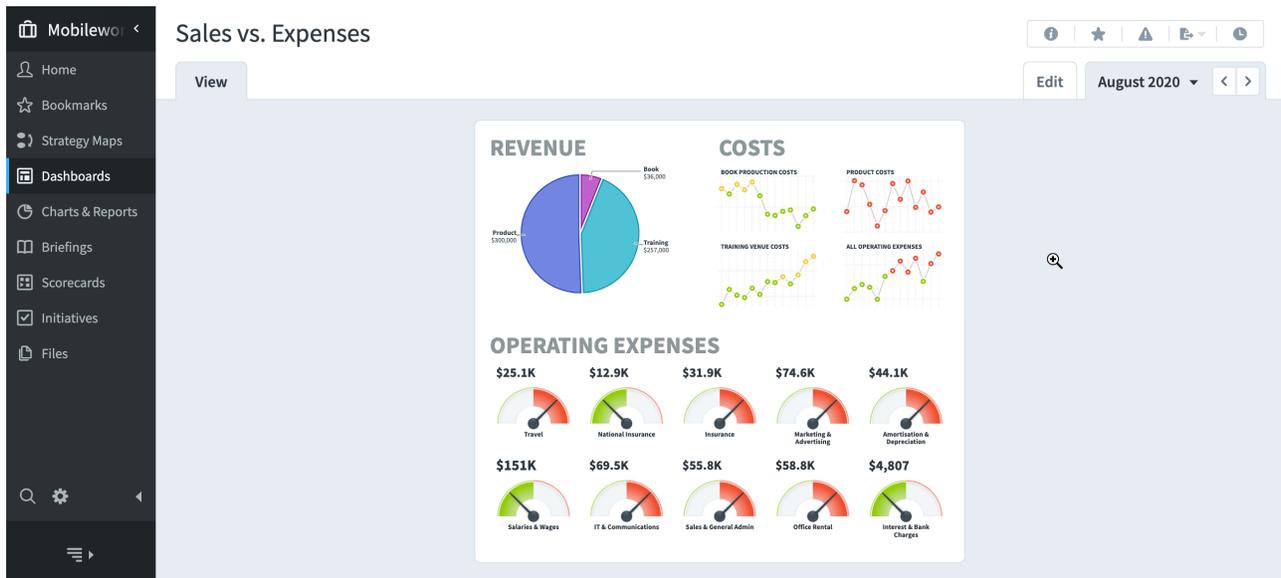
And then watch the canvas grow as we drag it away from the pie chart.



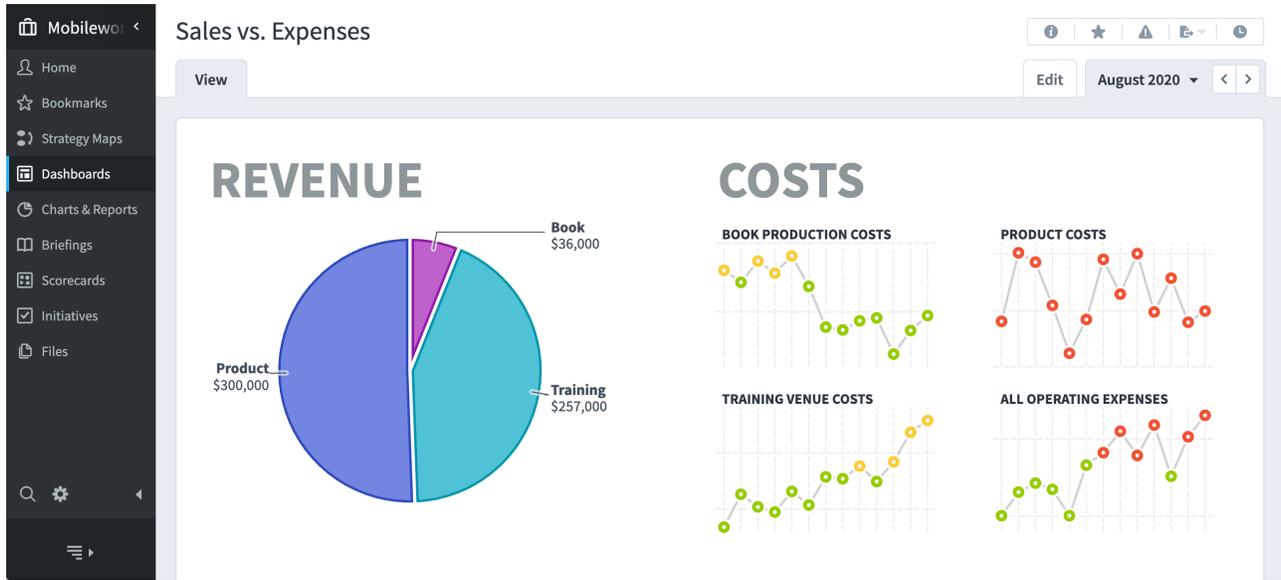
When you're viewing your dashboard, the size of your canvas doesn't matter. Spider Impact automatically zooms the dashboard so that it fits on screen. This is a lot like how PowerPoint presentations never have scroll bars during the presentation, but they do when editing.



Here we've made the browser very short and the dashboard resizes to fit.



Of course you can always click on the space around the dashboard to zoom in. Clicking again will zoom you back out.

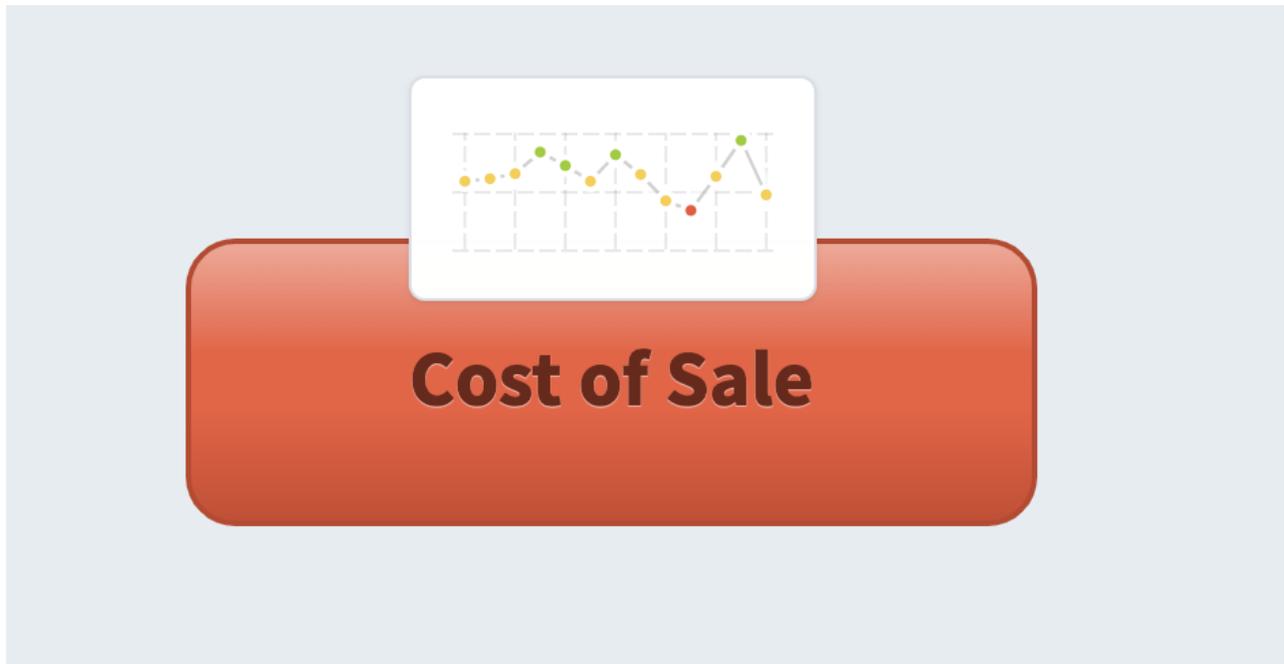


Automatic Ordering

Spider Impact automatically puts smaller dashboard widgets on top of larger dashboard widgets, completely avoiding the "move forward" and "move back" hassles seen in other software. For example, if you put small performance bubbles on top of a chart, they'll be above the chart so you can see them.



If we resize these exact same widgets and put the chart over one of the bubbles, however, the chart is now on top.

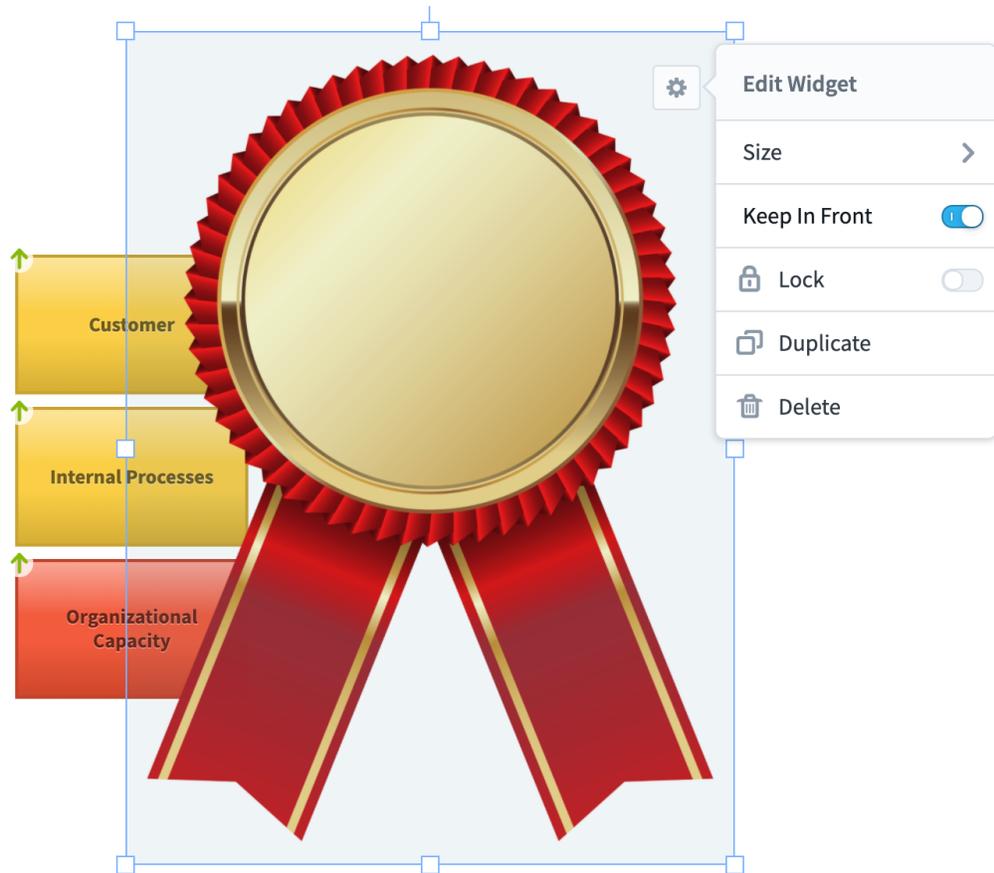


Keeping smaller widgets on top of larger widgets works great the vast majority of the time. If you're doing very complex layouts, however, there are times when you want to force a widget to the top.

In this example, we have an award image that we want to cover several smaller bubble widgets. Spider Impact is bringing the smaller bubble widgets to the front, though.



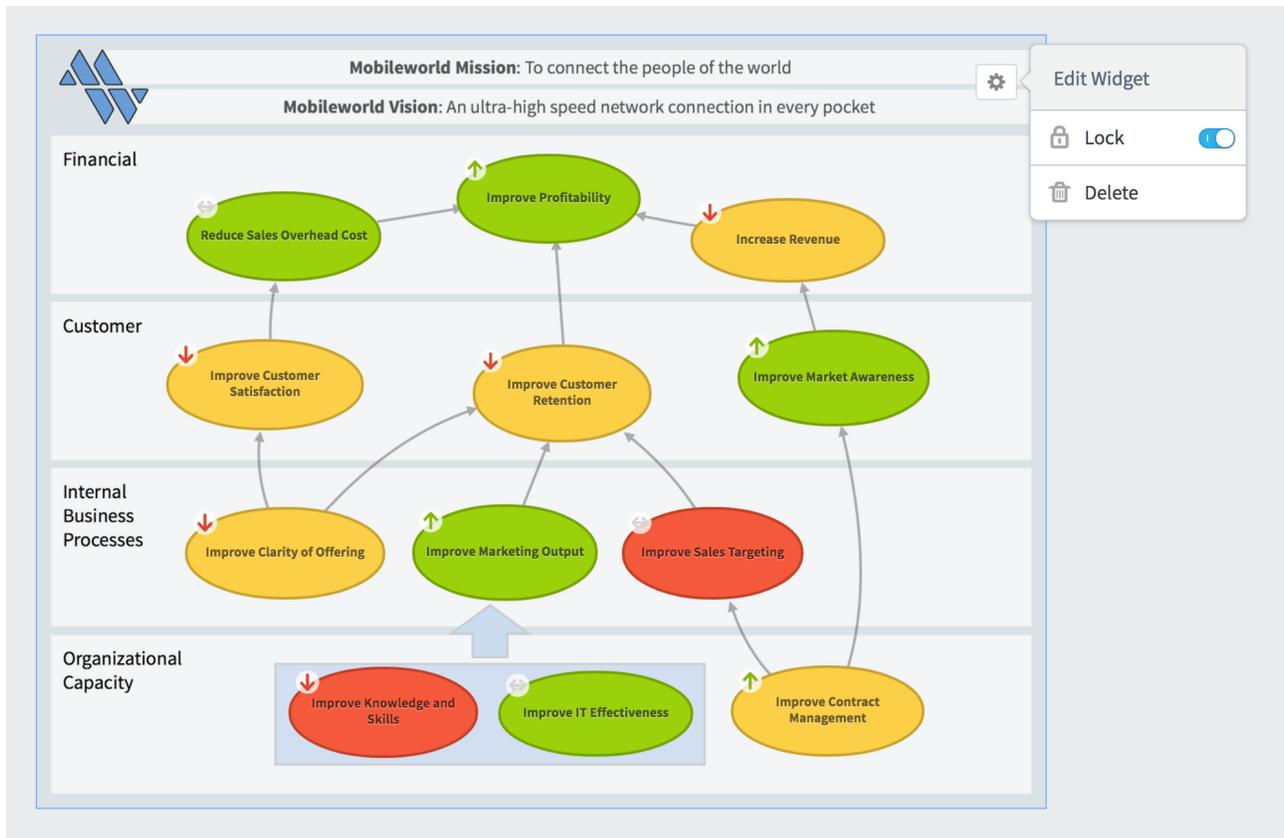
To force the award image to the top, we're going to turn on the "Keep in Front" toggle in the widget's configuration menu.



Locking Widgets

Because dashboards automatically put larger widgets underneath smaller widgets, you can upload a large background image and your smaller widgets will appear on top of it.

If you aren't careful, however, you can accidentally move your background image as you're editing other widgets. To solve this problem, just select the background image and turn on "Lock".



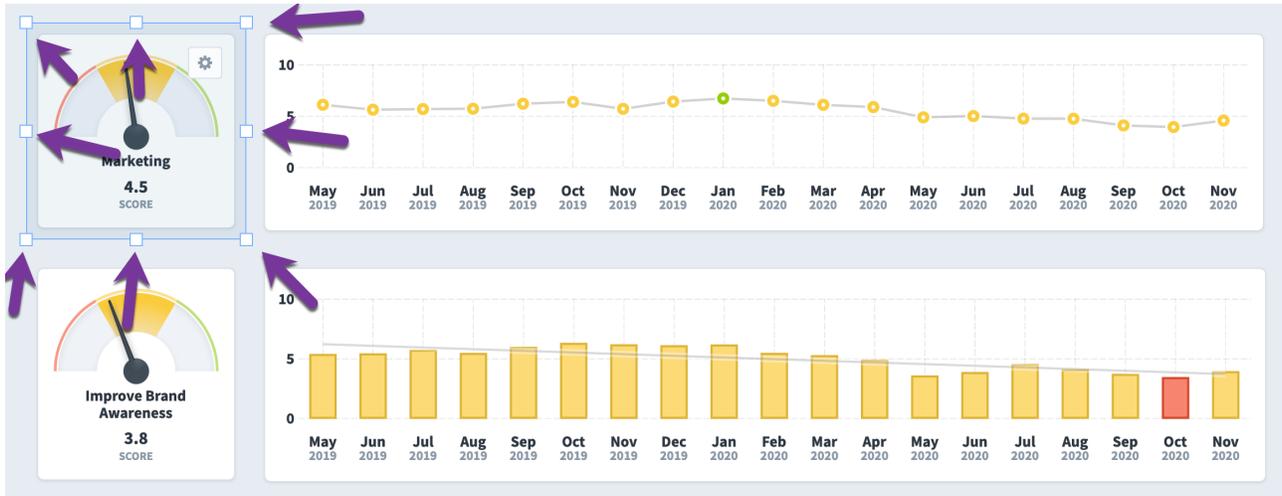
Not only does locking a widget prevent it from moving, but it also prevents it from being selected along with other widgets. So, when the background image is locked, you can drag to select all of the widgets on top of it without selecting the background image itself.

Please see the [Dashboard and Strategy Map Backgrounds](#) article for more information about all of the ways you can make dashboards even better with background images.

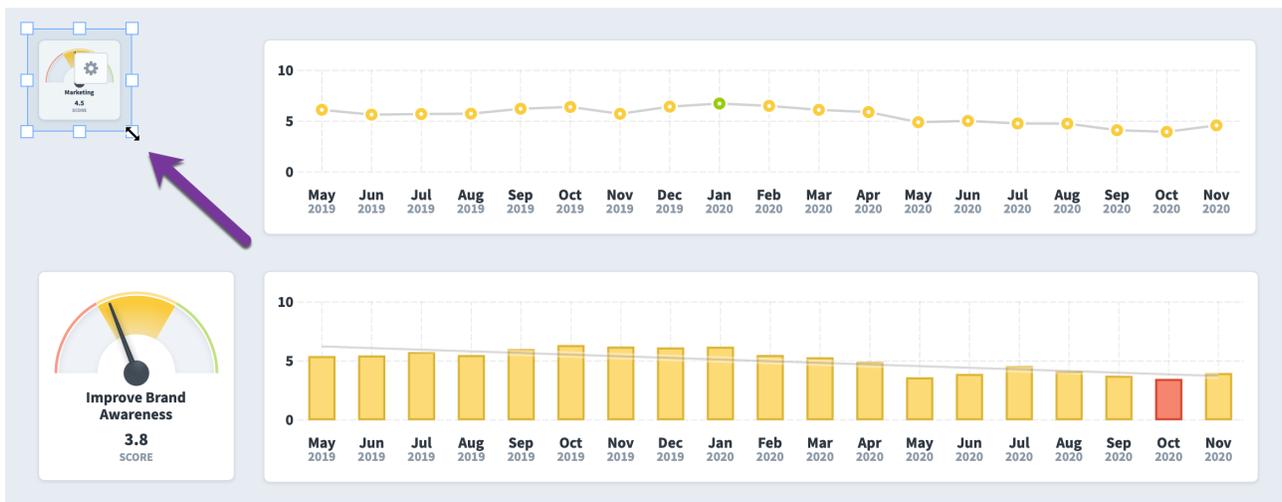
Widget Spacing, Alignment, and Sizing

Resizing

When you select a widget, you'll see resize handles on the sides and corners.



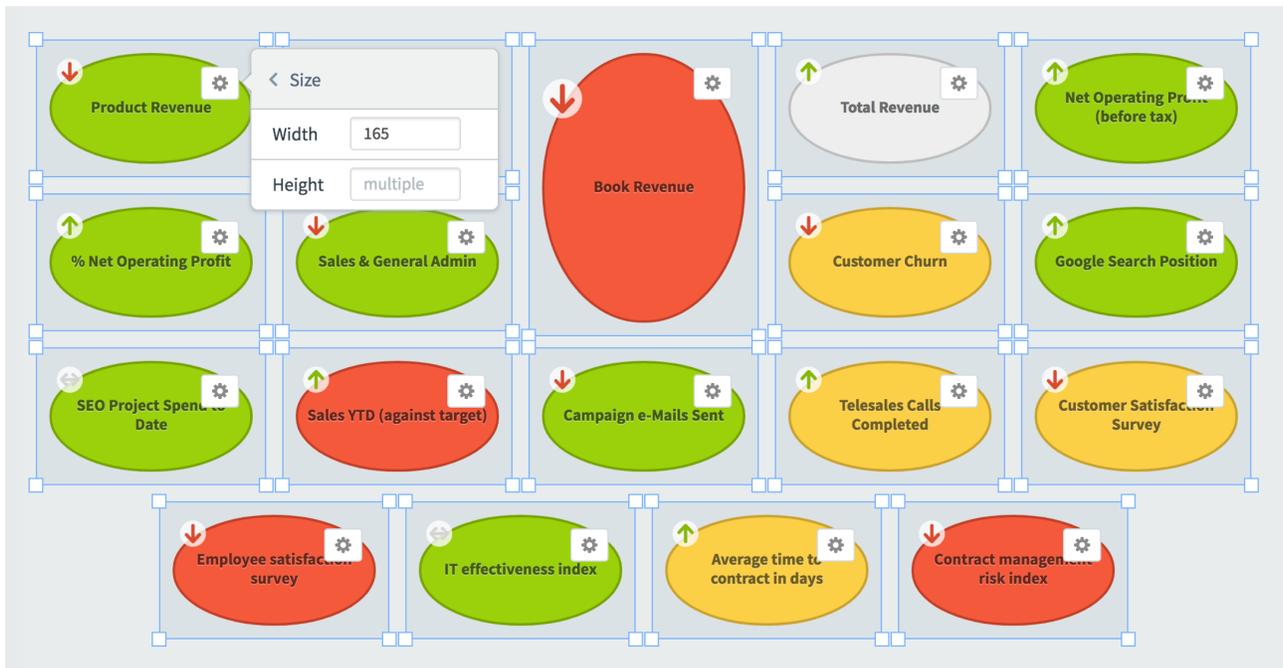
Just drag them to resize the widget.



You can also select multiple widgets (with drag or shift-click) and resize them all at once. Here we're resizing the two wide charts on the right.



To resize widgets to specific dimensions, choose "size" in the widget's configuration menu, and then type in a height or width. If multiple widgets are selected, your changes apply to them all. In this example, all of the widgets have the same width of 165, so it pre-fills that number in the size menu.

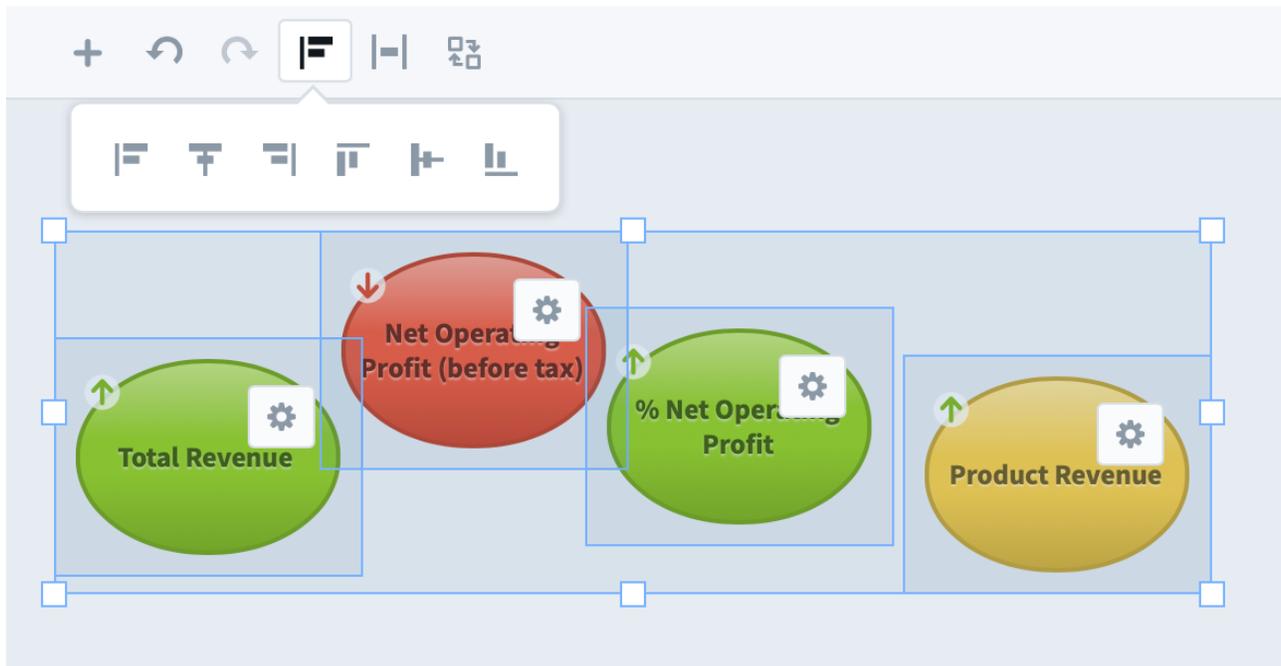


When we change the width to 90, all of the widgets instantly resize.

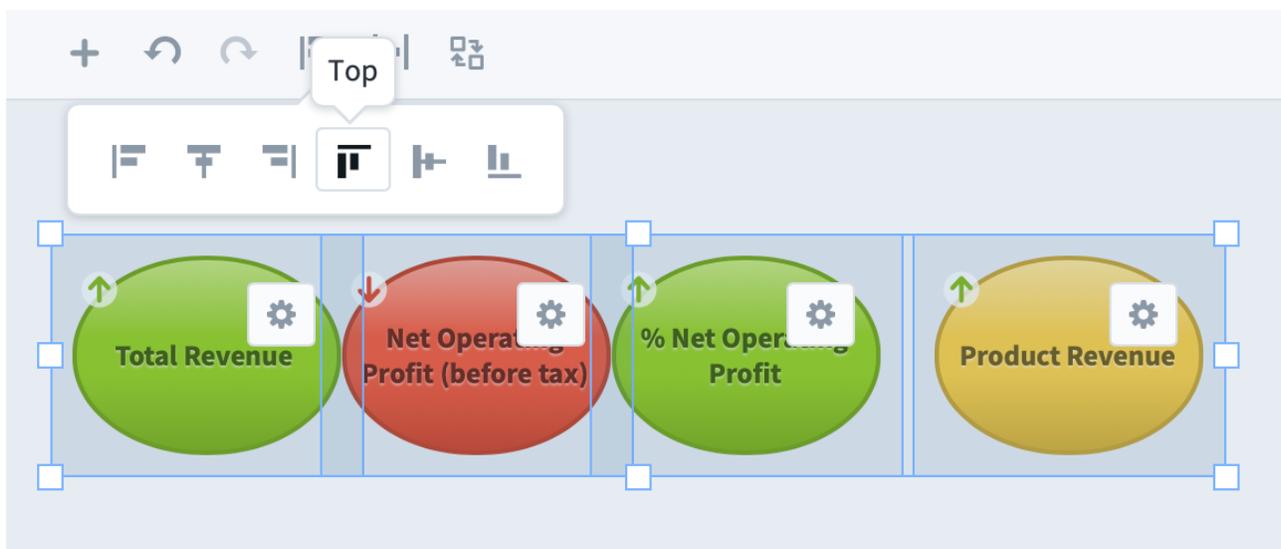


Align

You can select multiple widgets and then align them with top, bottom, right, left, middle vertical, or middle horizontal alignment. In this example we've selected four dashboard widgets.

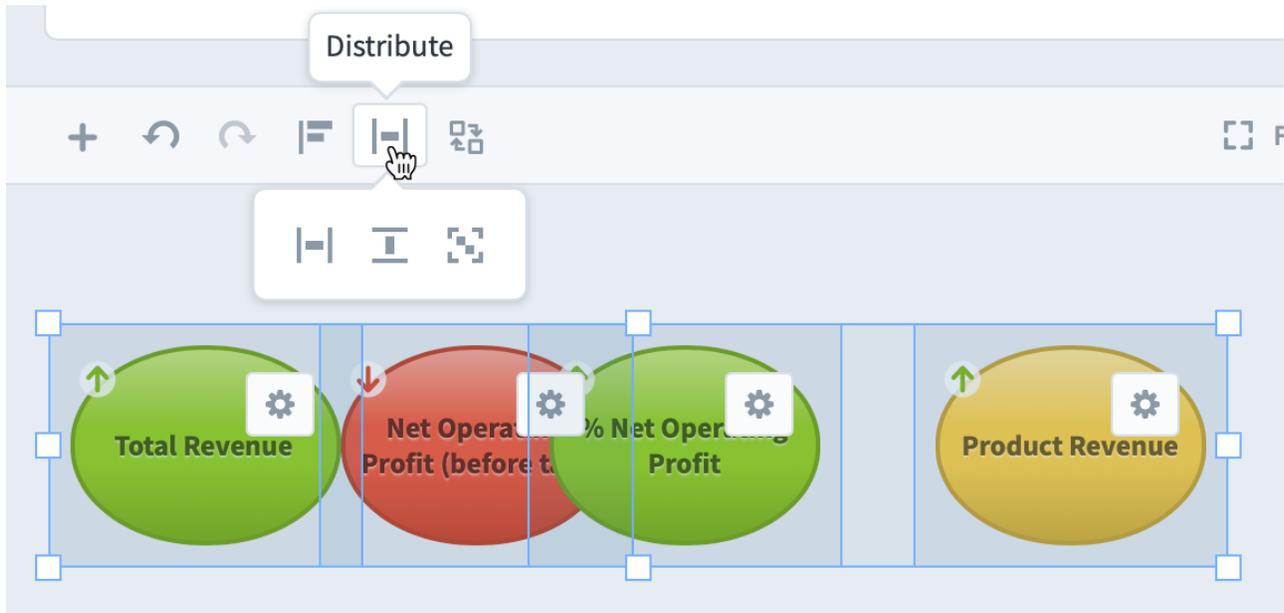


When we click the align top button, it moves all of the selected widgets to the highest point of all four widgets.

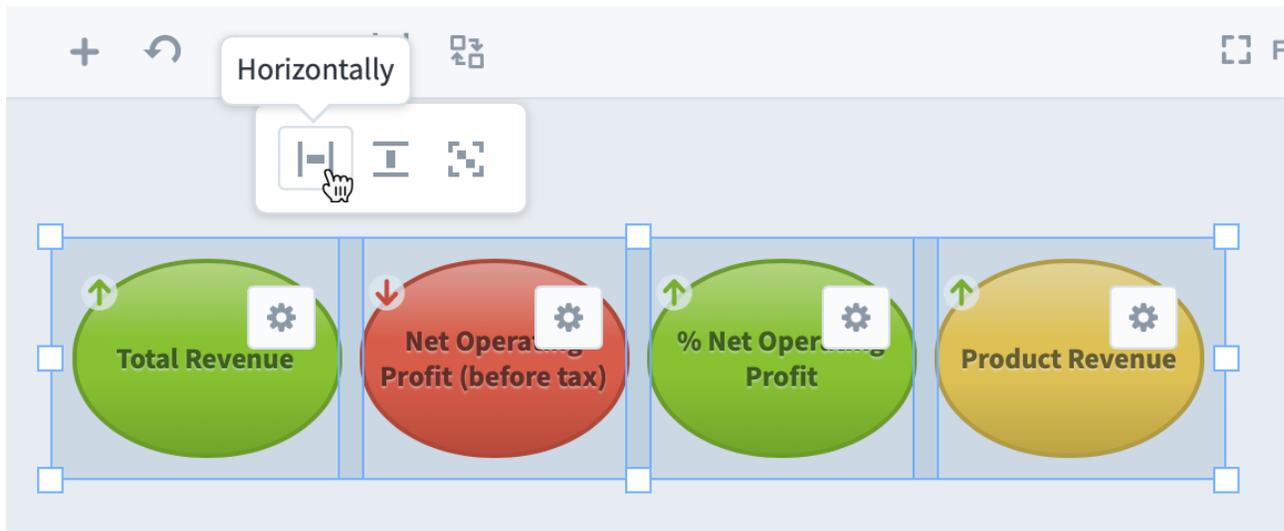


Distribute

The Distribute button allows you to select multiple widgets and then evenly space them horizontally or vertically. This example shows four widgets that are not evenly spaced.

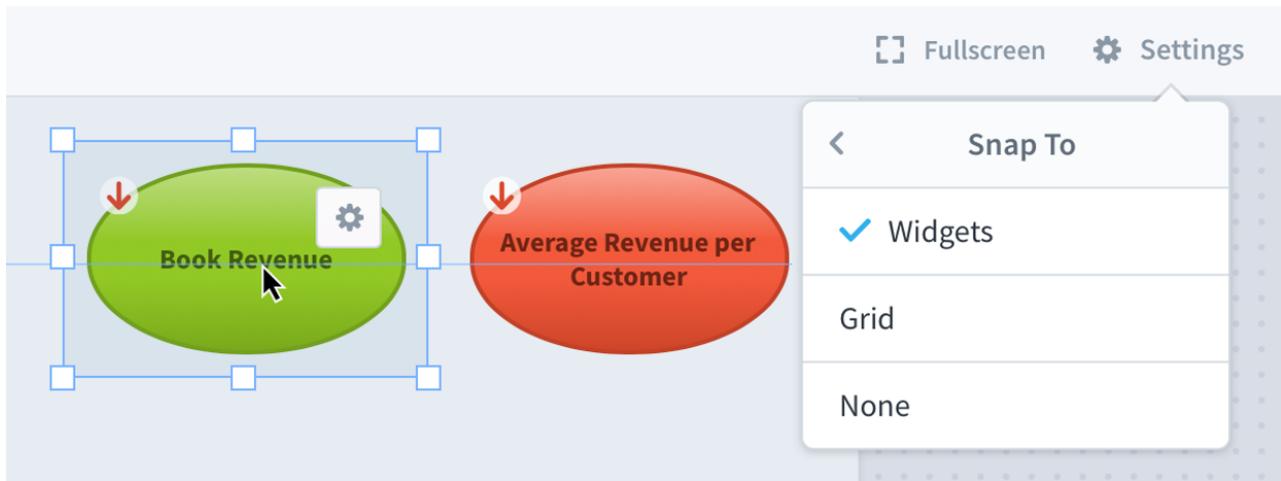


After clicking the button, the widgets are now evenly spaced.

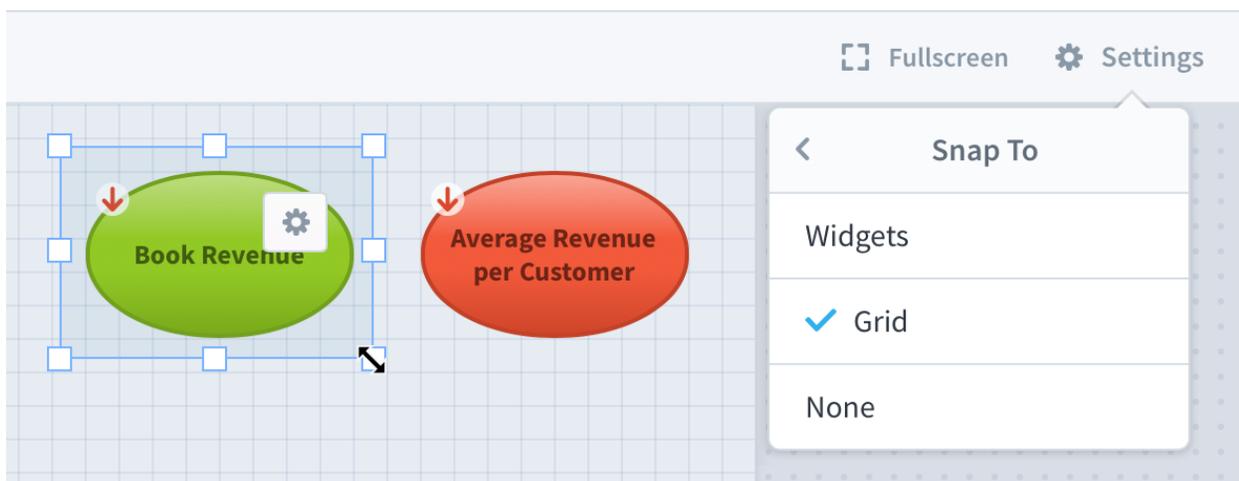


Alignment Snapping Options

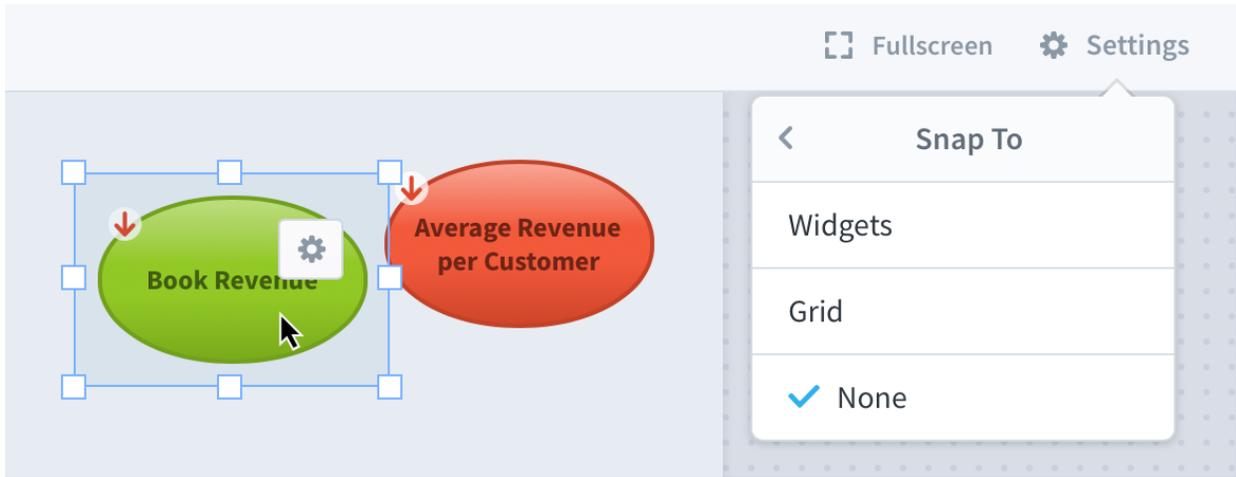
There are three different snap-to options when editing dashboards. The default option is Snap-to Widgets, which uses the size and position of other widgets on the dashboard as a guide when you're moving or resizing widgets.



Another option is Snap-to Grid, which aligns your widget position and size to a grid that only shows up when you're editing.



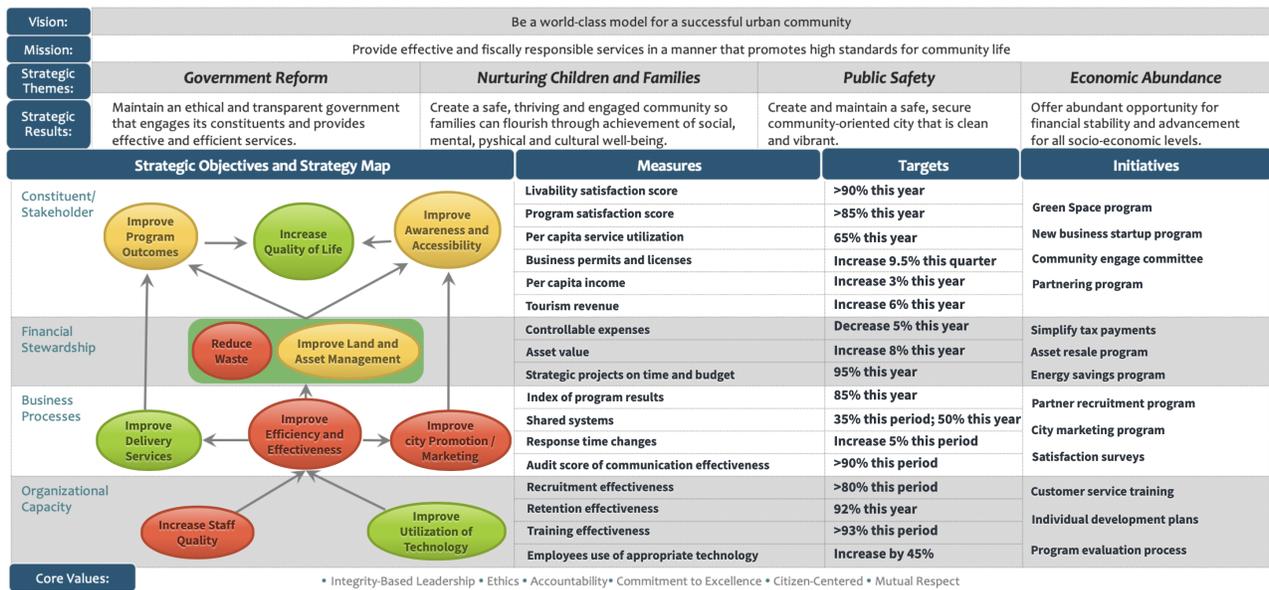
Finally, you can choose Snap-to None, which disables snapping all together. This is useful when fine-tuning layouts or when there are widgets that are irregularly placed.



Dashboard and Strategy Map Backgrounds

Overview

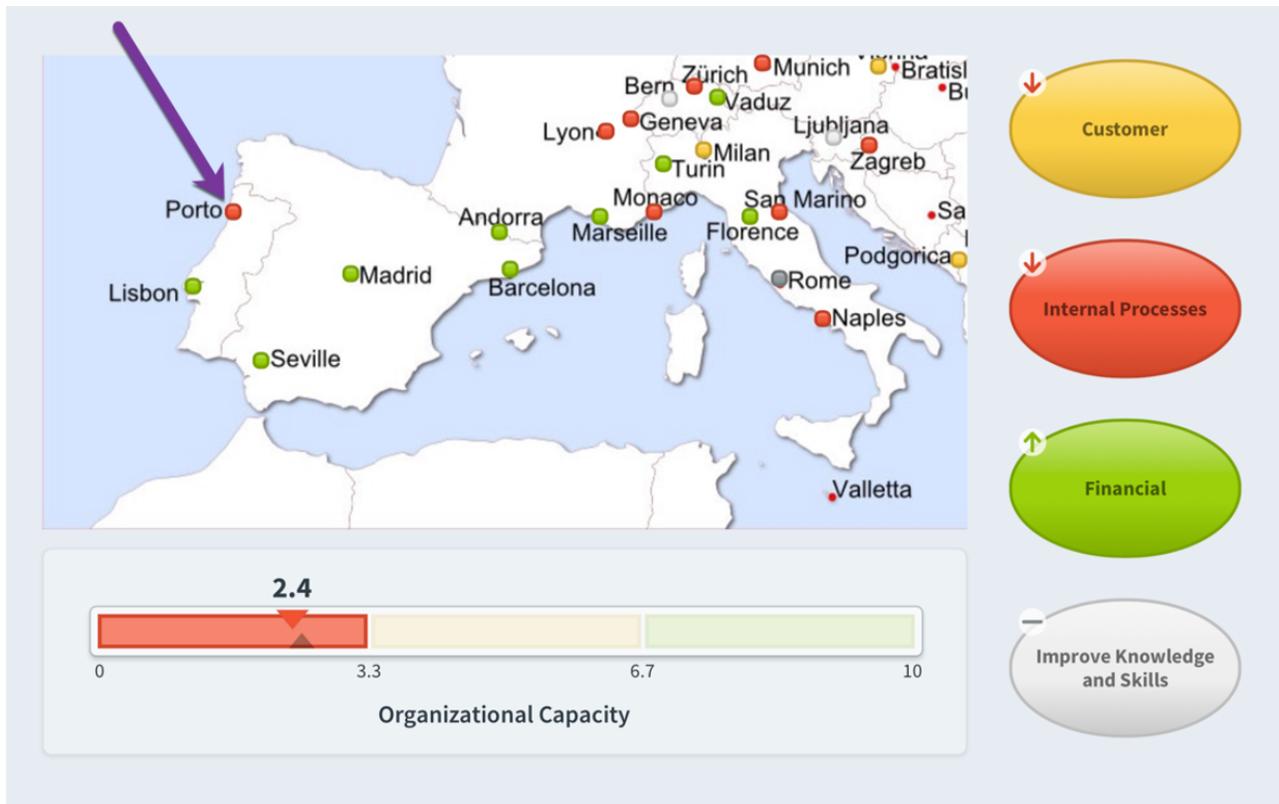
Dashboards and strategy maps look even better when you use image widgets creatively. For example, you can create a precise layout that looks exactly like the presentations your leadership team is used to seeing. This is just a screenshot of a PowerPoint slide with dashboard widgets on top.



Or you can spice up your dashboard with translucent layout elements, like these Aviation and Travel background images.



You can even overlap map images with colored bubbles that show the performance. This example shows small performance bubbles on European cities.



In this article we'll show you the general approach to using background images on dashboards and strategy maps.

Creating the Image

Let's start with a real-world example. The [Balanced Scorecard Institute](#) uses this slide in some of their training materials, and it's a great example of a strategic planning and management system. How would you get something like this into Spider Impact?

AutoSave Oct 2020 DashboardingOct2020_DW5

Home Insert Draw Design Transitions Animations Slide Show Review View Tell me

Share Comments

Paste New Slide Section

B I U X' x' A v A a

Convert to SmartArt Picture Shapes Text Box Arrange Quick Styles Shape Outline Design Ideas

BALANCED SCORECARD INSTITUTE Strategic Planning and Management System Example

Vision: Be a world-class model for a successful urban community

Mission: Provide effective and fiscally responsible services in a manner that promotes high standards for community life

Strategic Themes: Government Reform, Nurturing Children and Families, Public Safety, Economic Abundance

Strategic Results: Maintain an ethical and transparent government that engages its constituents and provides effective and efficient services. Create a safe, thriving and engaged community so families can flourish through achievement of social, mental, physical and cultural well-being. Create and maintain a safe, secure community-oriented city that is clean and vibrant. Offer abundant opportunity for financial stability and advancement for all socio-economic levels.

Strategic Objectives and Strategy Map		Measures	Targets	Initiatives
Constituent/Stakeholder	<ul style="list-style-type: none"> Improve Program Outcomes Increase Quality of Life Improve Awareness and Accessibility 	<ul style="list-style-type: none"> Livability satisfaction score Program satisfaction score Per capita service utilization Business permits and licenses Per capita income Tourism revenue 	<ul style="list-style-type: none"> >90% this year >8% this year 65% this year ↑9.5% each quarter ↑3% this year ↑6% this year 	<ul style="list-style-type: none"> Green Space program New business startup program Community engage committee Partnering program
Financial Stewardship	<ul style="list-style-type: none"> Reduce Waste Improve Land and Asset Management 	<ul style="list-style-type: none"> Controllable expenses Asset value Strategic projects on time and budget 	<ul style="list-style-type: none"> ↓5% this year ↑8% this year 95% this year 	<ul style="list-style-type: none"> Simplify tax payments Asset resale program Energy savings program
Business Processes	<ul style="list-style-type: none"> Improve Delivery Services Improve Efficiency and Effectiveness Improve city Promotion/Marketing 	<ul style="list-style-type: none"> Index of program results Shared systems Response time changes Audit score of communication effectiveness 	<ul style="list-style-type: none"> 85% this year 35% this period; 50% this year ↑5% this period >90% this period 	<ul style="list-style-type: none"> Partner recruitment program City marketing program Satisfaction surveys
Organizational Capacity	<ul style="list-style-type: none"> Increase Staff Quality Improve Utilization of Technology 	<ul style="list-style-type: none"> Recruitment effectiveness Retention effectiveness Training effectiveness Employees use of appropriate technology 	<ul style="list-style-type: none"> > 80% this period 92% this year >93% this period ↑45% 	<ul style="list-style-type: none"> Customer service training Individual development plans Program evaluation process

Core Values: Integrity-Based Leadership • Ethics • Accountability • Commitment to Excellence • Citizen-Centered • Mutual Respect

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Slide 8 of 27 English (United States) Notes Comments 125%

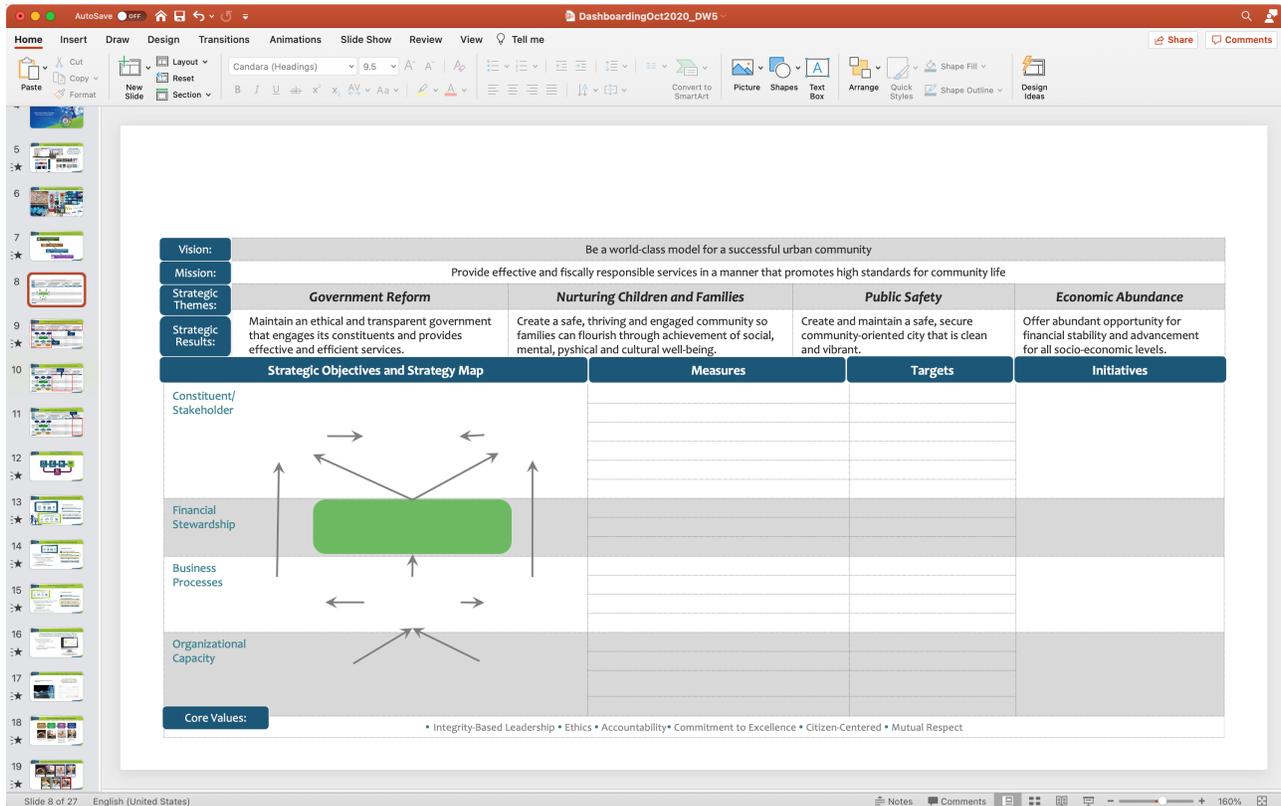
First, let's remove all of the information on the slide that we don't want to show up in Spider Impact. In PowerPoint that means hiding background graphics. This removes the slide header and footers.

The screenshot shows a presentation software interface with a slide titled "DashboardingOct2020_DW5". The slide content includes:

- Vision:** Be a world-class model for a successful urban community
- Mission:** Provide effective and fiscally responsible services in a manner that promotes high standards for community life
- Strategic Themes:**
 - Government Reform:** Maintain an ethical and transparent government that engages its constituents and provides effective and efficient services.
 - Nurturing Children and Families:** Create a safe, thriving and engaged community so families can flourish through achievement of social, mental, physical and cultural well-being.
 - Public Safety:** Create and maintain a safe, secure community-oriented city that is clean and vibrant.
 - Economic Abundance:** Offer abundant opportunity for financial stability and advancement for all socio-economic levels.
- Strategic Objectives and Strategy Map:** A flowchart showing relationships between various objectives like "Improve Program Outcomes", "Increase Quality of Life", "Improve Awareness and Accessibility", "Reduce Waste", "Improve Land and Asset Management", "Improve Delivery Services", "Improve Efficiency and Effectiveness", "Improve City Promotion/Marketing", "Increase Staff Quality", and "Improve Utilization of Technology".
- Measures, Targets, and Initiatives:** A table listing specific metrics and goals for each area.
- Core Values:** Integrity-Based Leadership • Ethics • Accountability • Commitment to Excellence • Citizen-Centered • Mutual Respect

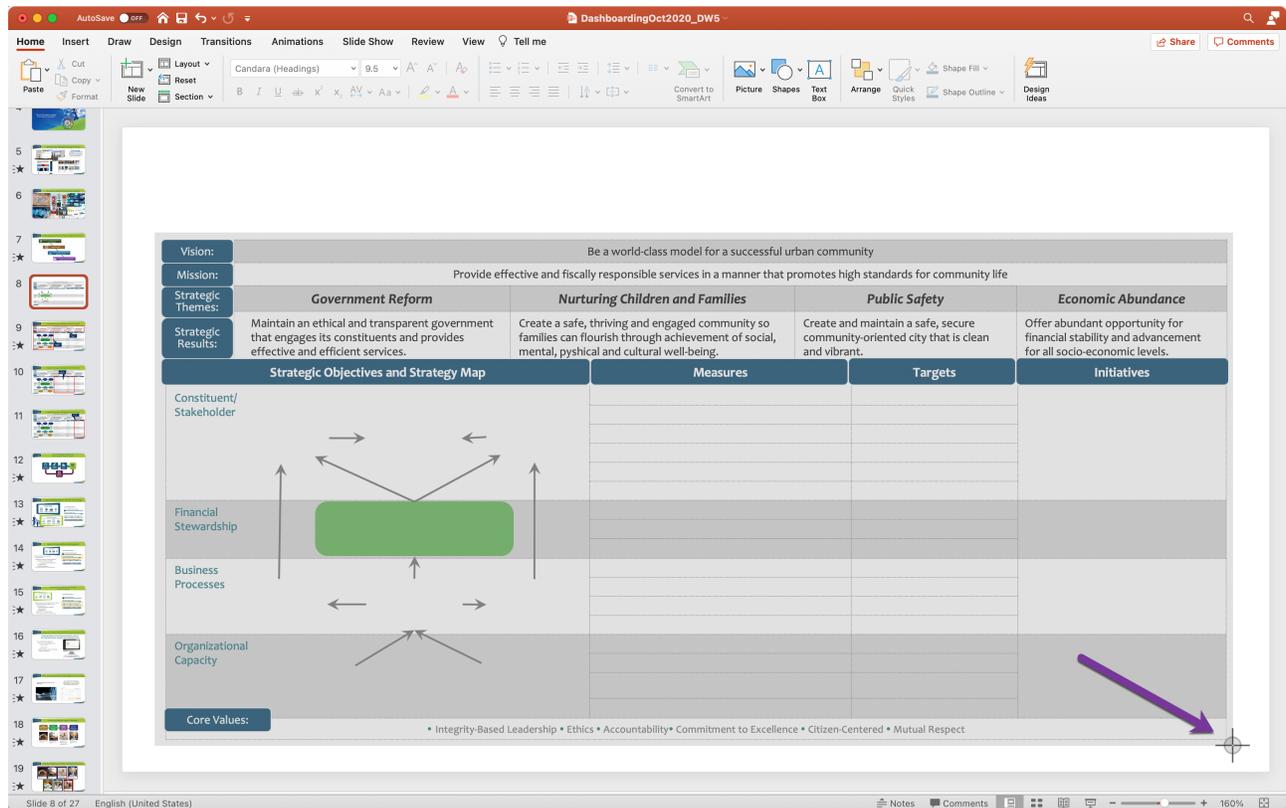
The "Format Background" panel on the right has the "Hide Background Graphics" checkbox checked. A purple arrow points to this checkbox.

Now we're going to remove all information on this slide that we want to automatically update based on live data in Spider Impact. We end up with this:



Finally we need to turn that slide into an image, and there are a variety of ways you can do this. PowerPoint has the ability to export slides as images, but if you do that, you'll need to edit the image to crop off the extra white space on the edges. Instead, we're going to take a screenshot of just the relevant part of the slide.

In Windows you can do this by *Windows Key + Shift + S*, selecting the region you want, and then pasting it into Paint. On Mac you can do this with *CMD + Shift + 4* and it will save the image to your desktop.



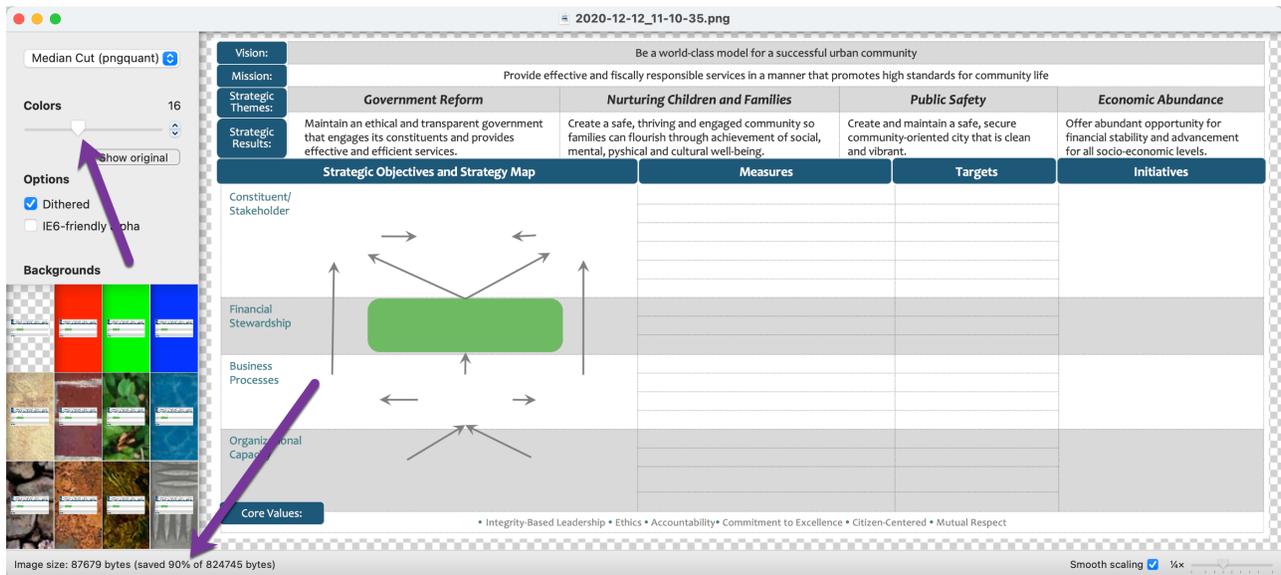
Make sure the image is large enough so that it doesn't look pixelated on your dashboard. You'll usually be in good shape if your image is at least 1,600 pixels wide. In this example the screenshot is actually 3,200 pixels wide because I want it to look good on high resolution screens.

Compressing the Image

Large dashboard images load slowly, so we want to make sure the file size isn't too big. Most dashboard background images will work best in the PNG format because they're made of solid colors. If yours has a lot of gradients or photos, however, JPEG may be a better choice.

Raw PNG images can be very large, though, so we're going to reduce the file size before we use our screenshot in Spider Impact. There are a variety of tools to do this, and here we're going to use [ImageAlpha](#) and [ImageOptim](#), both of which are for Mac.

ImageAlpha reduces the size of PNGs by changing the number of colors in their color palate. In this example our background image still looks great with only 16 colors, and its size is only 10% of what it was before. Every image is different, though, and you'll often be best at 128 or 64 colors. Be sure to zoom in on the details to make sure you're not over-compressing.



Next we'll use ImageOptim to strip off all of the extra metadata and make the file as small as possible. This app works with any image format and has saved us an additional 12%.



By using these two apps, we've gone from 825K to 77K. Again, there are many image compression utilities available that do this exact same thing.

Creating Your Dashboard

Now it's time to add your dashboard. Be sure to resize it large enough so that there's plenty of room to add content, and the lock it in place.

The screenshot shows the BSI dashboard interface. On the left is a dark sidebar with navigation options: PERSONAL (Home, Bookmarks), PRESENTATION (Strategy Maps, Dashboards, Charts & Reports, Briefings), and FOUNDATION (Scorecards, Initiatives, Files). The main area displays a strategy map widget titled 'BSI' with a vision: 'Be a world-class model for a successful urban community'. The map includes a central green bubble, a 'Strategic Objectives and Strategy Map' section with arrows, and a table with columns for Measures, Targets, and Initiatives. An 'Edit Widget' menu is open on the right, showing a 'Lock' toggle which is currently turned off. A purple arrow points to this toggle. At the bottom, a note states: 'Dashboard automatically expands as you drag widgets'.

And finally we'll add widgets. Here we've added bubbles for the objectives, measures, targets, and initiatives. For the Measures, Targets, and Initiatives we've turned off the bubble background so only the text shows up. That way you can click on the text to drill down for more information.

The screenshot shows the BSI dashboard interface. At the top, there is a 'Name' field containing 'BSI' and buttons for 'Move', 'Copy', 'Template', and 'Delete'. An 'Edit Widget' dialog box is open, showing options for 'Set Period', 'Font Size' (10), 'Text Color', 'Outside Font Size' (14), and 'Drilldown'. The background dashboard content includes a vision statement, mission, strategic themes, and a strategic objectives and strategy map diagram.

Vision: Be a world-class model for a successful urban community
Mission: Provide effective and fiscally responsible services in a manner that promotes high standards for community life
Strategic Themes: Government Reform, Nurturing Children and Families, Public Safety, Economic Abundance
Strategic Results: Maintain an ethical and transparent government that engages its constituents and provides effective and efficient services. Create a safe, thriving and engaged community so families can flourish through achievement of social, mental, physical and cultural well-being. Create and maintain a safe, secure community-oriented city that is clean and vibrant. Offer abundant opportunity for financial stability and advancement for all socio-economic levels.

Strategic Objectives and Strategy Map: A diagram showing interconnected objectives across four levels: Constituent/Stakeholder, Financial Stewardship, Business Processes, and Organizational Capacity. Objectives include 'Improve Program Outcomes', 'Increase Quality of Life', 'Improve Awareness and Accessibility', 'Reduce Waste', 'Improve Land and Asset Management', 'Improve Delivery Services', 'Improve Efficiency and Effectiveness', 'Improve City Promotion / Marketing', 'Increase Staff Quality', and 'Improve Utilization of Technology'.

Measures, Targets, and Initiatives: A table listing various metrics and their corresponding targets and initiatives.

Measures	Targets	Initiatives
Livability satisfaction score	>90% this year	Green Space program
Program satisfaction score	>85% this year	New business startup program
Per capita service utilization	65% this year	Community engage committee
Business permits and licenses	Increase 9.5% this quarter	Partnering program
Per capita income	Increase 3% this year	
Tourism revenue	Increase 6% this year	
Controllable expenses	Decrease 5% this year	Simplify tax payments
Asset value	Increase 8% this year	Asset resale program
Strategic projects on time and budget	95% this year	Energy savings program
Index of program results	85% this year	Partner recruitment program
Shared systems	35% this period; 50% this year	City marketing program
Response time changes	Increase 5% this period	Satisfaction surveys
Audit score of communication effectiveness	>90% this period	
Recruitment effectiveness	>80% this period	Customer service training
Retention effectiveness	92% this year	Individual development plans
Training effectiveness	>93% this period	Program evaluation process
Employees use of appropriate technology	Increase by 45%	

Core Values: Integrity-Based Leadership • Ethics • Accountability • Commitment to Excellence

When we're done we have a fully interactive dashboard showing live data, all in a format that our organization is familiar with.

This screenshot shows the completed BSI dashboard. The 'Name' field is 'BSI'. The 'Edit Widget' dialog is still open. The dashboard content is more detailed, showing a 'Strategic Objectives and Strategy Map' diagram and a table of measures, targets, and initiatives.

Vision: Be a world-class model for a successful urban community
Mission: Provide effective and fiscally responsible services in a manner that promotes high standards for community life
Strategic Themes: Government Reform, Nurturing Children and Families, Public Safety, Economic Abundance
Strategic Results: Maintain an ethical and transparent government that engages its constituents and provides effective and efficient services. Create a safe, thriving and engaged community so families can flourish through achievement of social, mental, physical and cultural well-being. Create and maintain a safe, secure community-oriented city that is clean and vibrant. Offer abundant opportunity for financial stability and advancement for all socio-economic levels.

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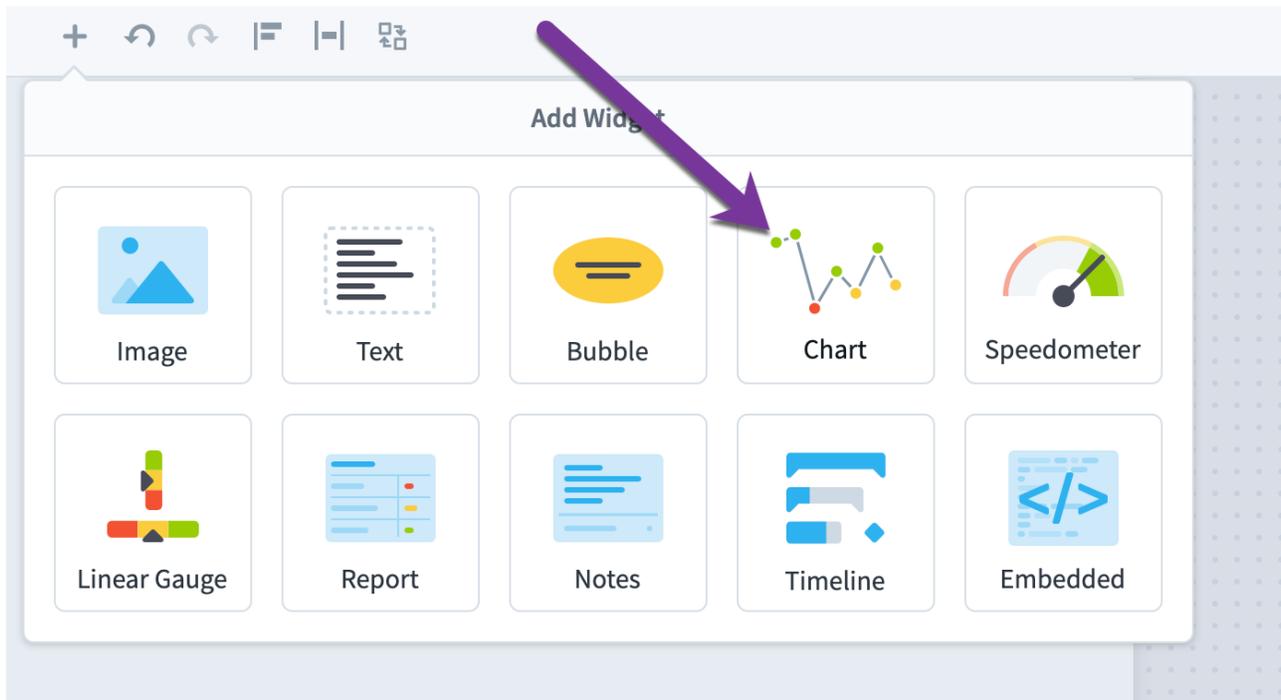
Measures, Targets, and Initiatives: A table listing various metrics and their corresponding targets and initiatives.

Measures	Targets	Initiatives
Livability satisfaction score	>90% this year	Green Space program
Program satisfaction score	>85% this year	New business startup program
Per capita service utilization	65% this year	Community engage committee
Business permits and licenses	Increase 9.5% this quarter	Partnering program
Per capita income	Increase 3% this year	
Tourism revenue	Increase 6% this year	
Controllable expenses	Decrease 5% this year	Simplify tax payments
Asset value	Increase 8% this year	Asset resale program
Strategic projects on time and budget	95% this year	Energy savings program
Index of program results	85% this year	Partner recruitment program
Shared systems	35% this period; 50% this year	City marketing program
Response time changes	Increase 5% this period	Satisfaction surveys
Audit score of communication effectiveness	>90% this period	
Recruitment effectiveness	>80% this period	Customer service training
Retention effectiveness	92% this year	Individual development plans
Training effectiveness	>93% this period	Program evaluation process
Employees use of appropriate technology	Increase by 45%	

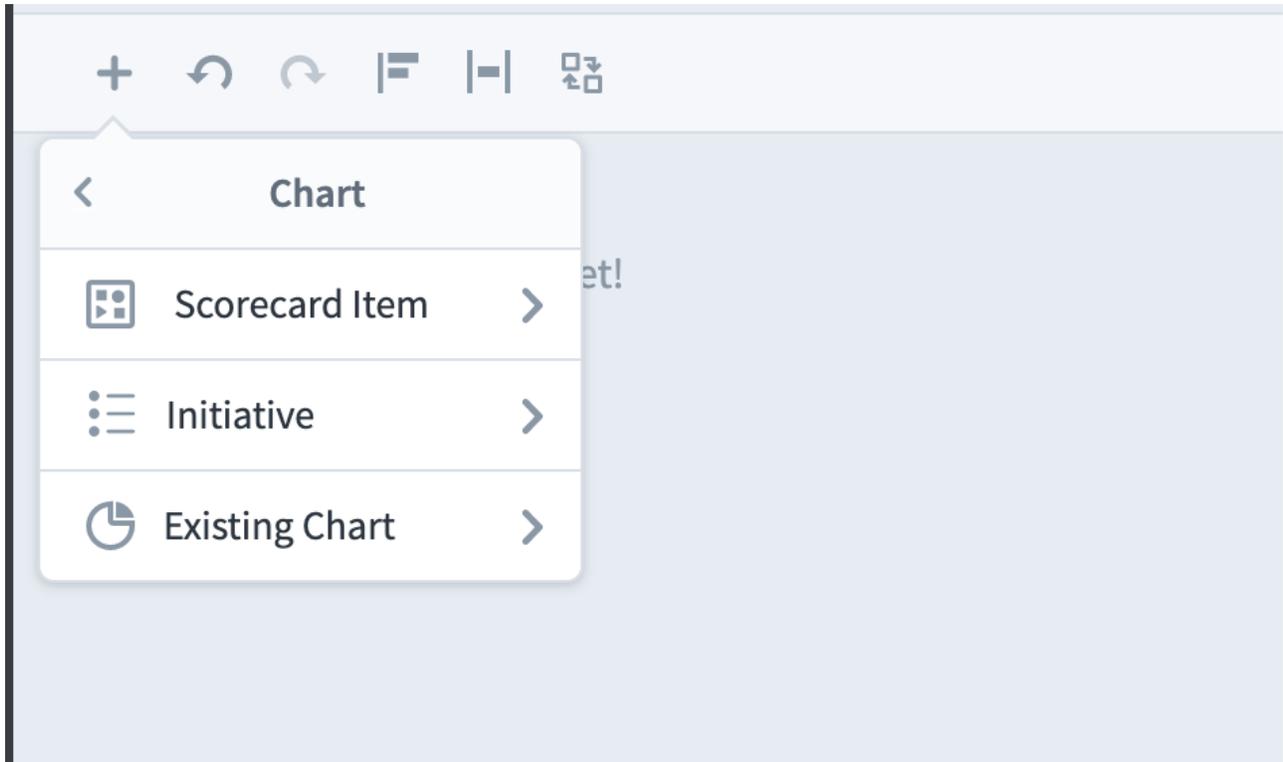
Core Values: Integrity-Based Leadership • Ethics • Accountability • Commitment to Excellence • Citizen-Centered • Mutual Respect

Chart Widgets

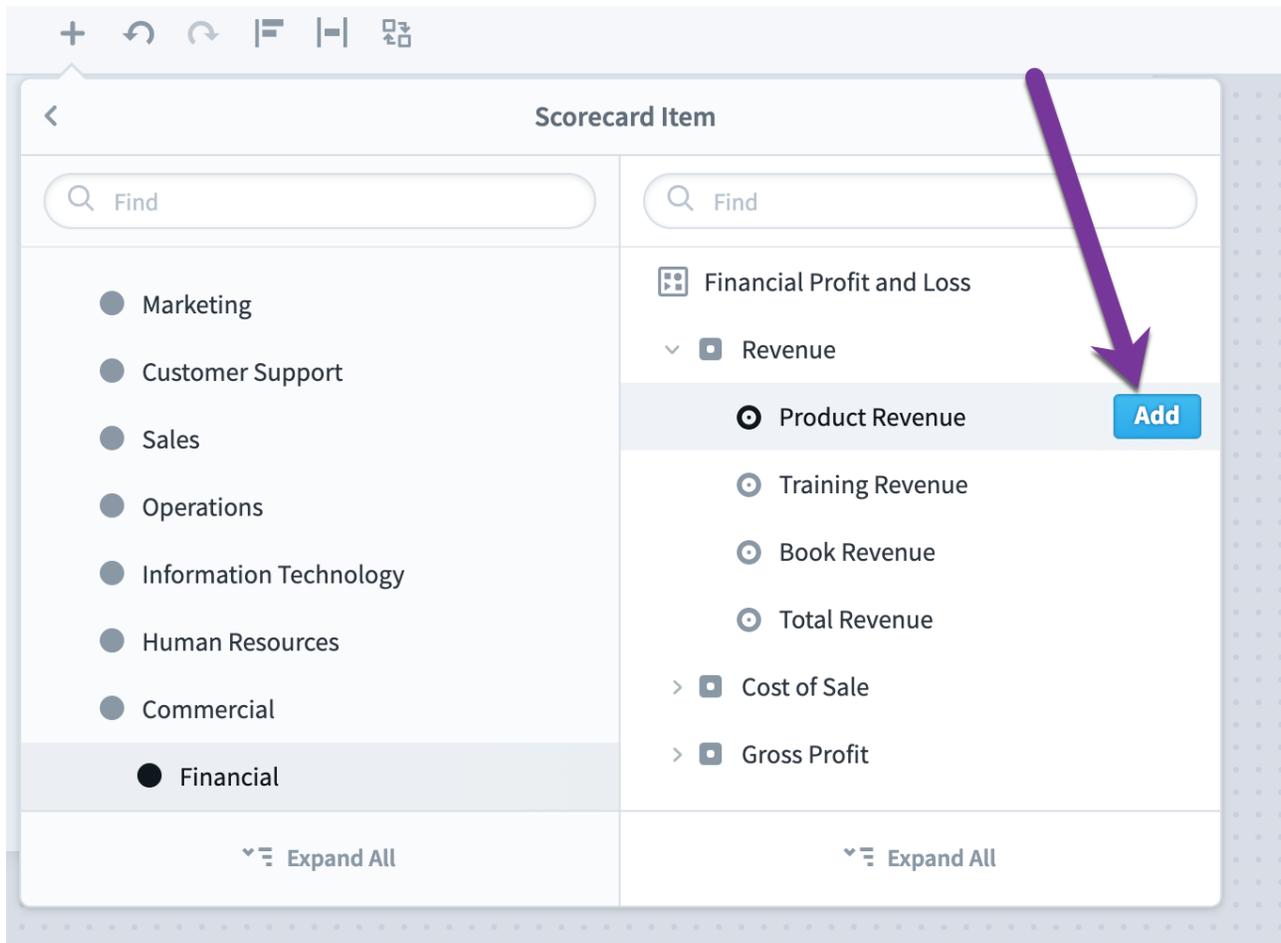
You can add a chart widget to your dashboard from the *Add Widget* menu.



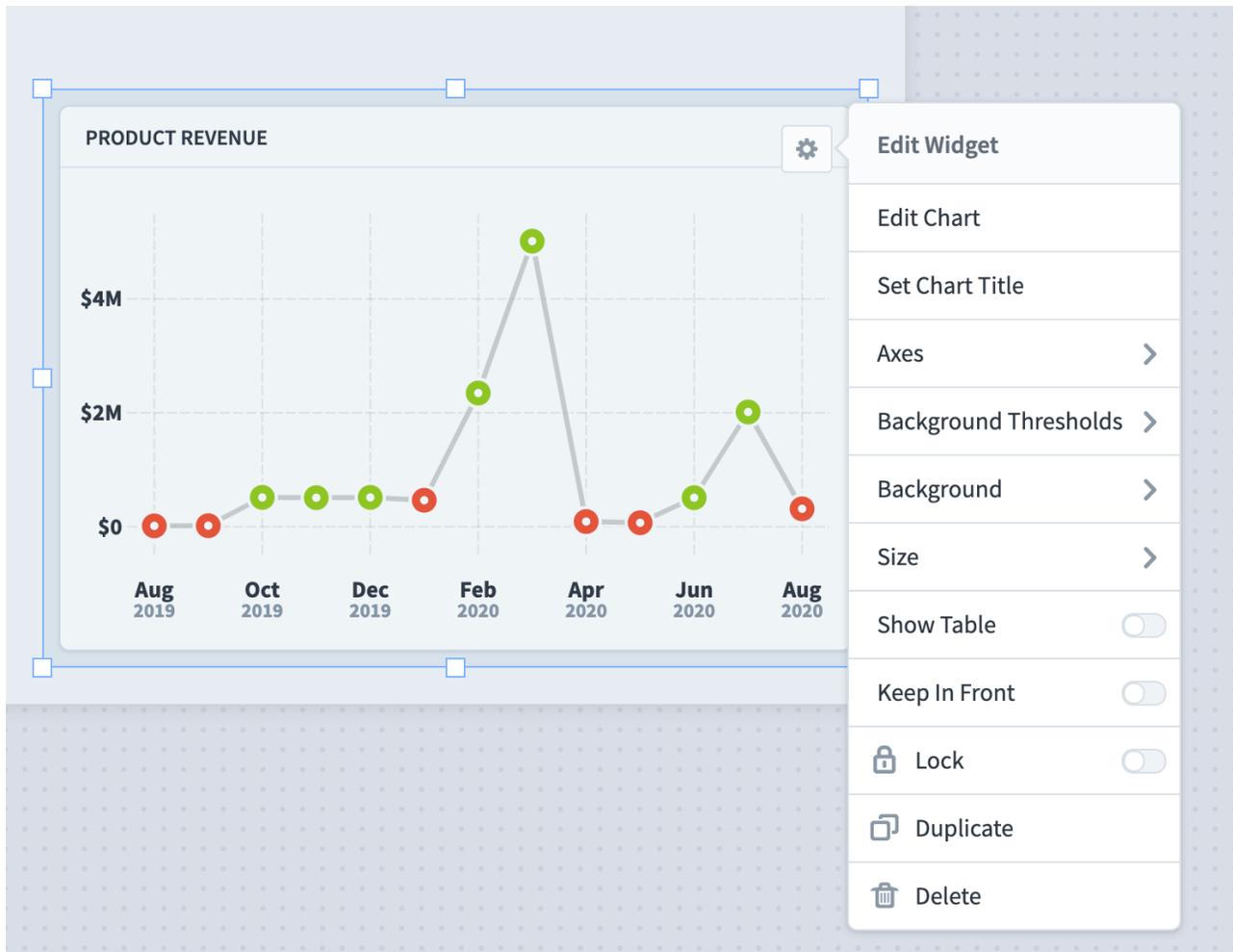
Next you can choose to add a chart for a Scorecard Item, Initiative Item, or a chart that you've already created in the Reports section.



In this example we'll choose *Scorecard Item* and then choose an item to add to the dashboard.



When we click *Add* a chart is added to the dashboard.

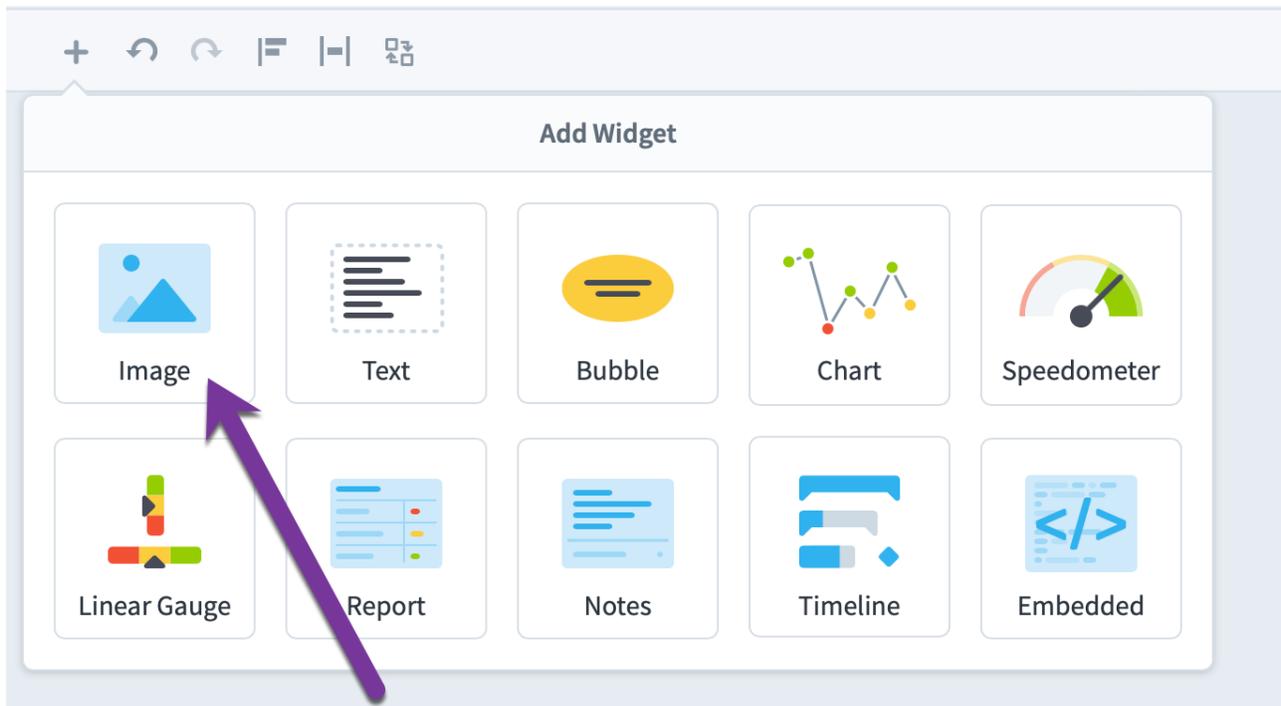


From here, you can configure your chart to show your data in a variety of ways. This is the same process as configuring charts in the Dashboards section, and both are covered in the [Customizing Charts](#) article.

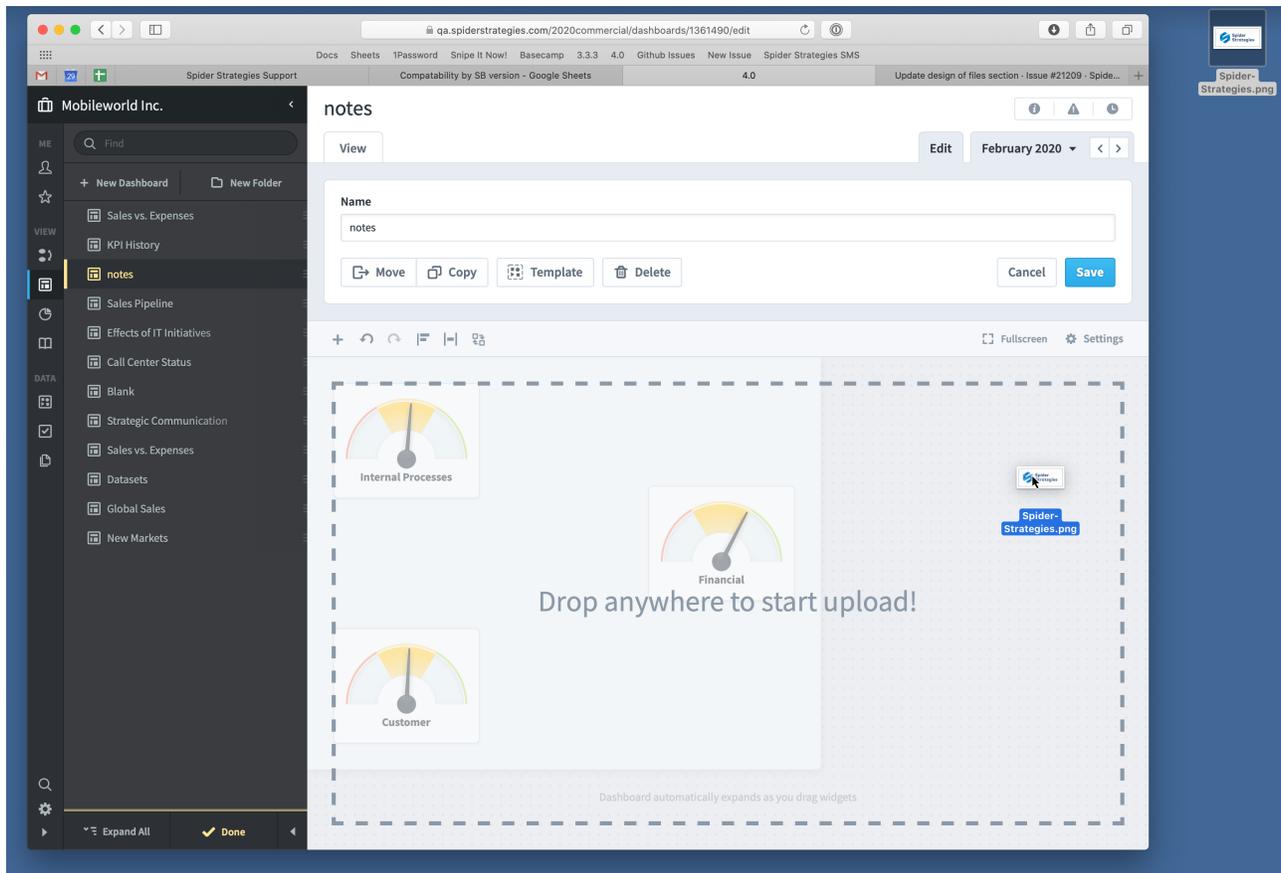
Image Widgets

Adding an Image widget

Like all dashboard widgets, you can add an image widget from the Add Widget menu.

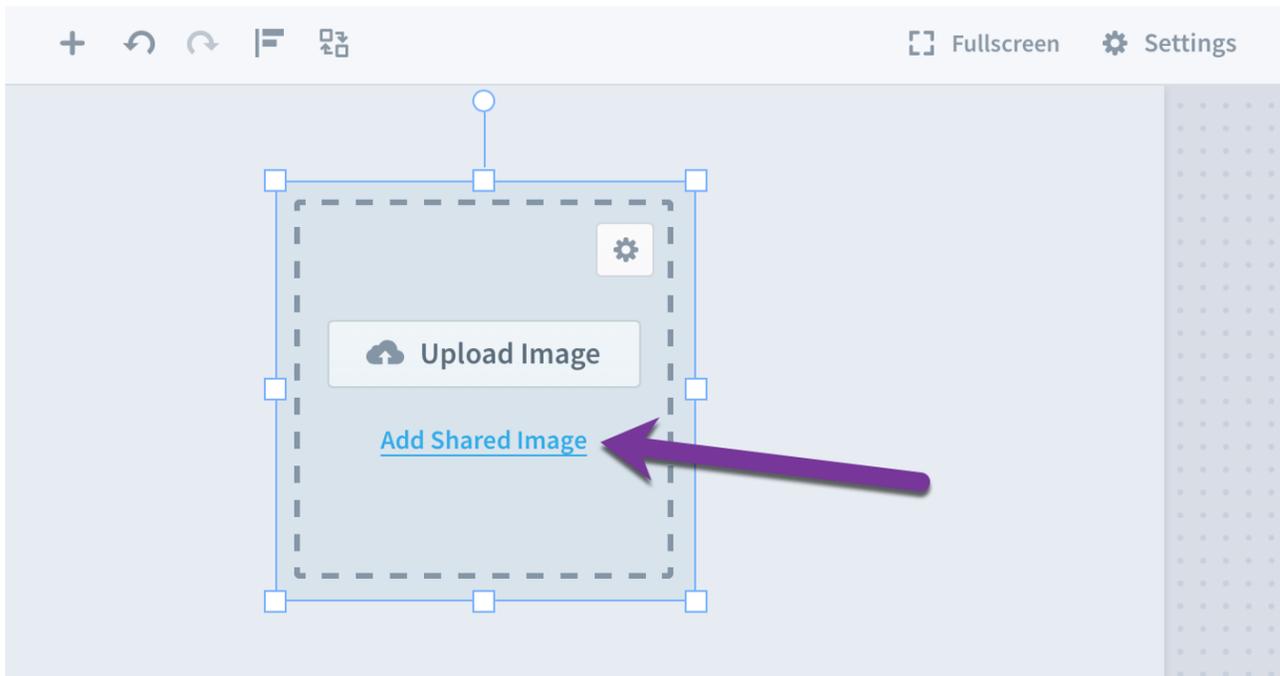


Or, to save time, you can just drag and drop an image file from your desktop.

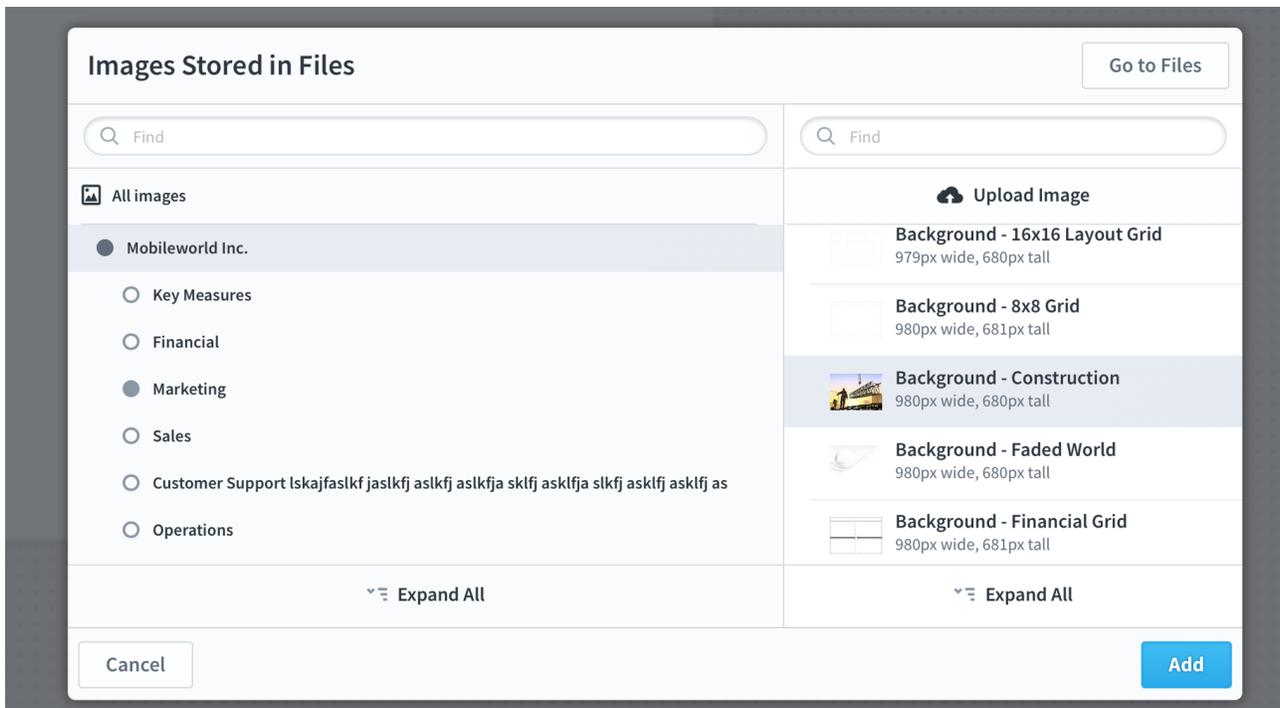


Shared Images

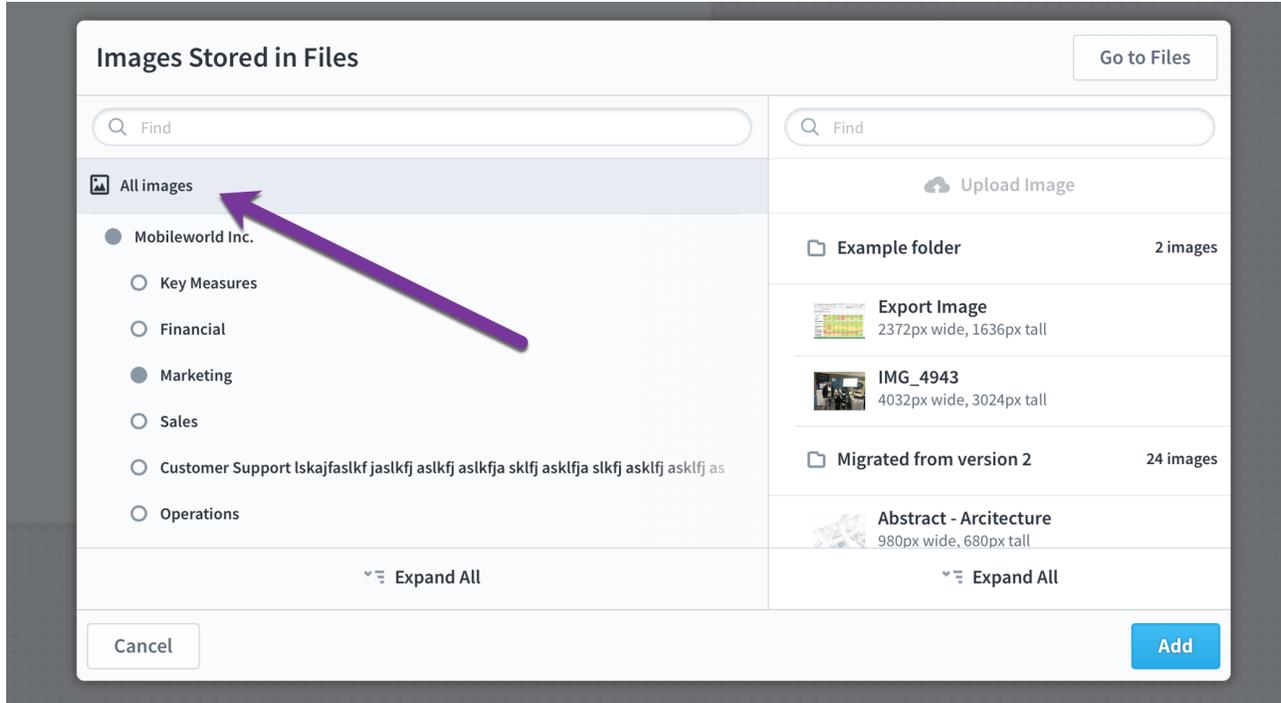
You can manage shared images in the [Files section](#), and then add those images to dashboards. To do this, just click the “Add Shared Image” link on an image widget.



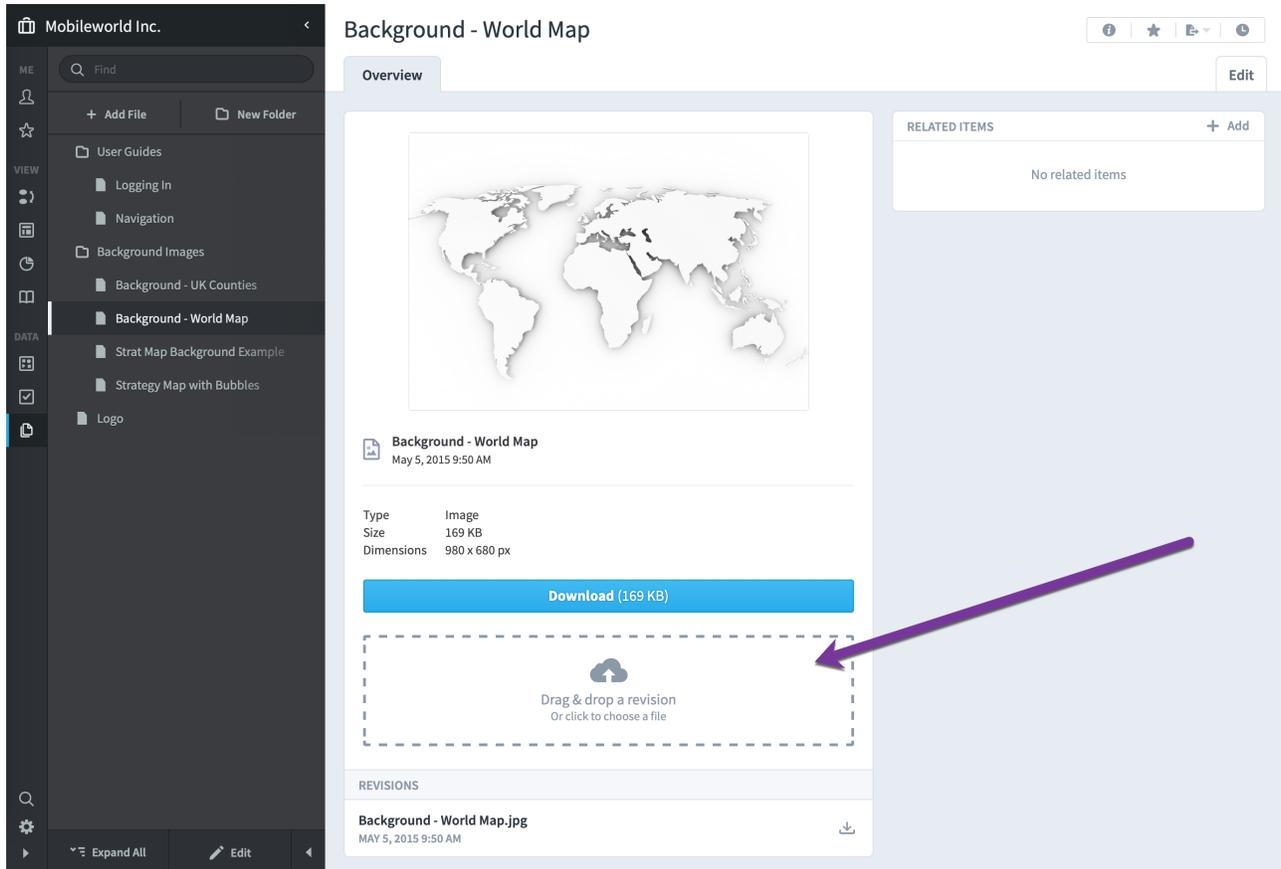
This opens a dialog where you can browse for images stored in the Files section. By default, everything is sorted by organization.



If you don't know which organization your image is in, however, you can select "All Images" at the top of the organization tree. This combines all images from all organizations on the right.



If you ever want to update the shared image later, just upload a new revision in the Files section. All of the dashboards using this shared image will automatically update.



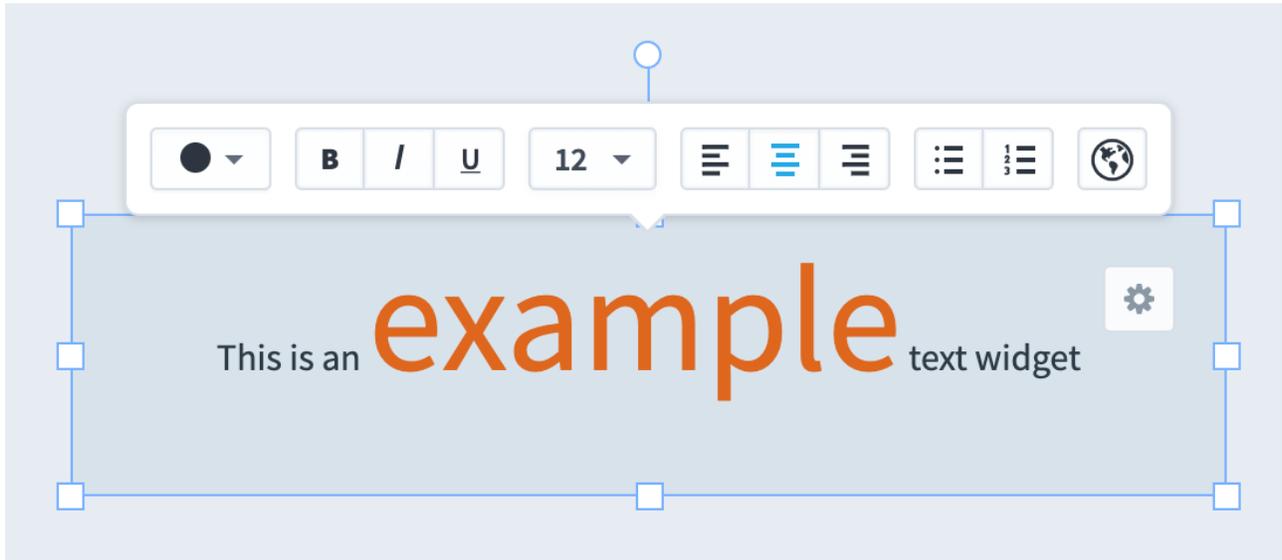
Using Images for Backgrounds

Please see the [Dashboard and Strategy Map Backgrounds](#) article for more information about all of the ways you can make dashboards even better with background images.

Text Widgets

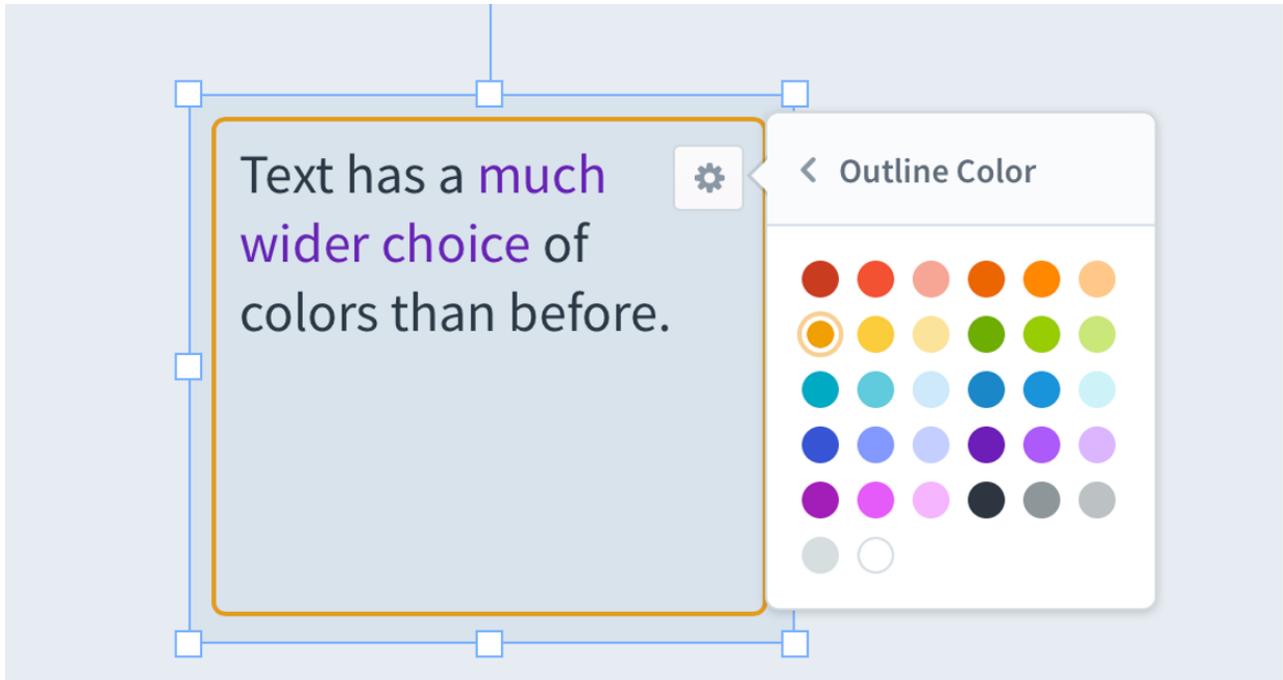
Overview

Text widgets are great for adding labels or titles to your dashboards. You can include text formatting, links, and even rotate them.



Outlines

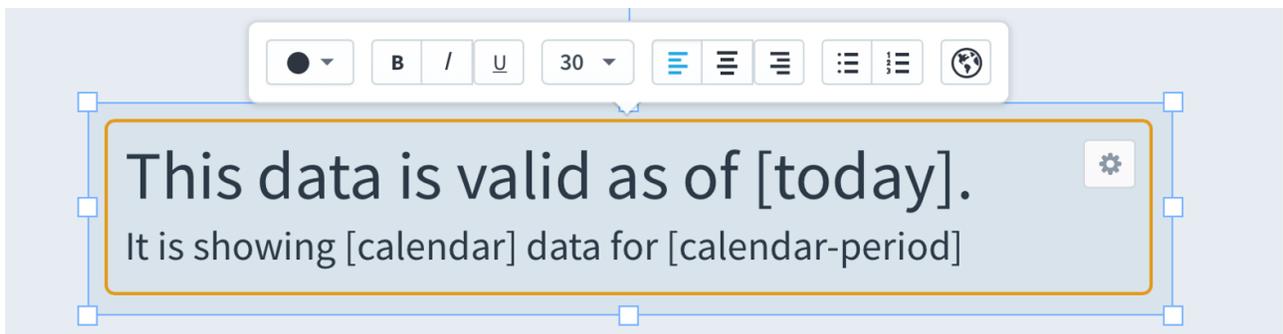
You can choose an outline color for your text widget as well as the outline thickness.



Text Variables

You can use the following variables in text widgets:

- [today]
- [calendar]
- [calendar-period]
- [dashboard]
- [organization]



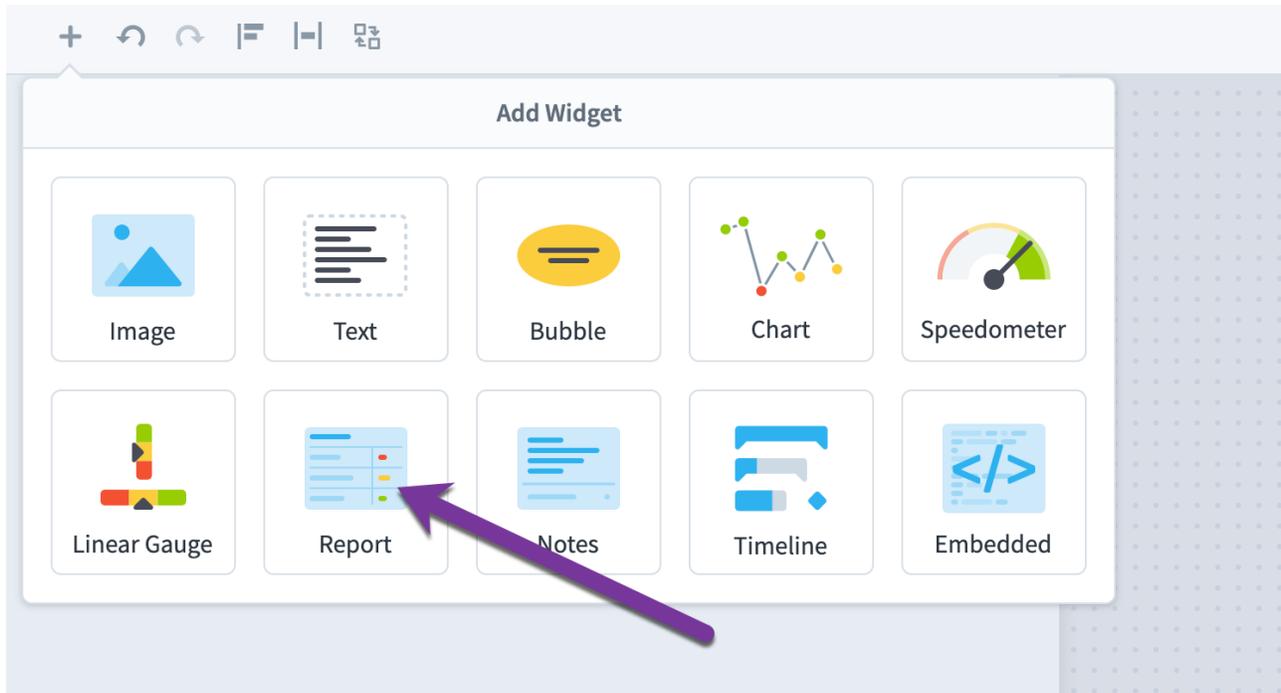
When you view the dashboard, these variables will be automatically replaced.

This data is valid as of Apr 8, 2019.
It is showing Monthly data for March 2019

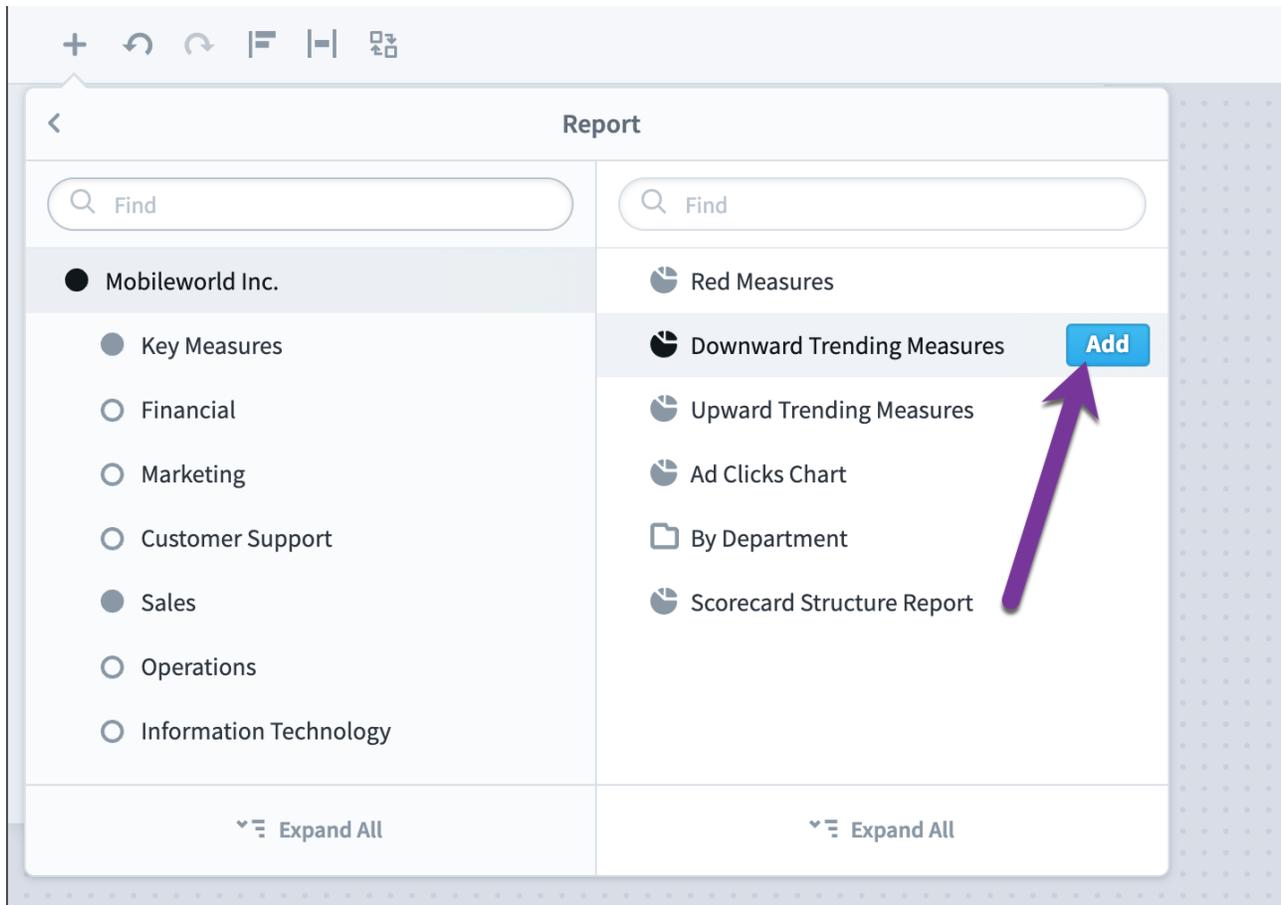
Report Widgets

Adding a Report Widget

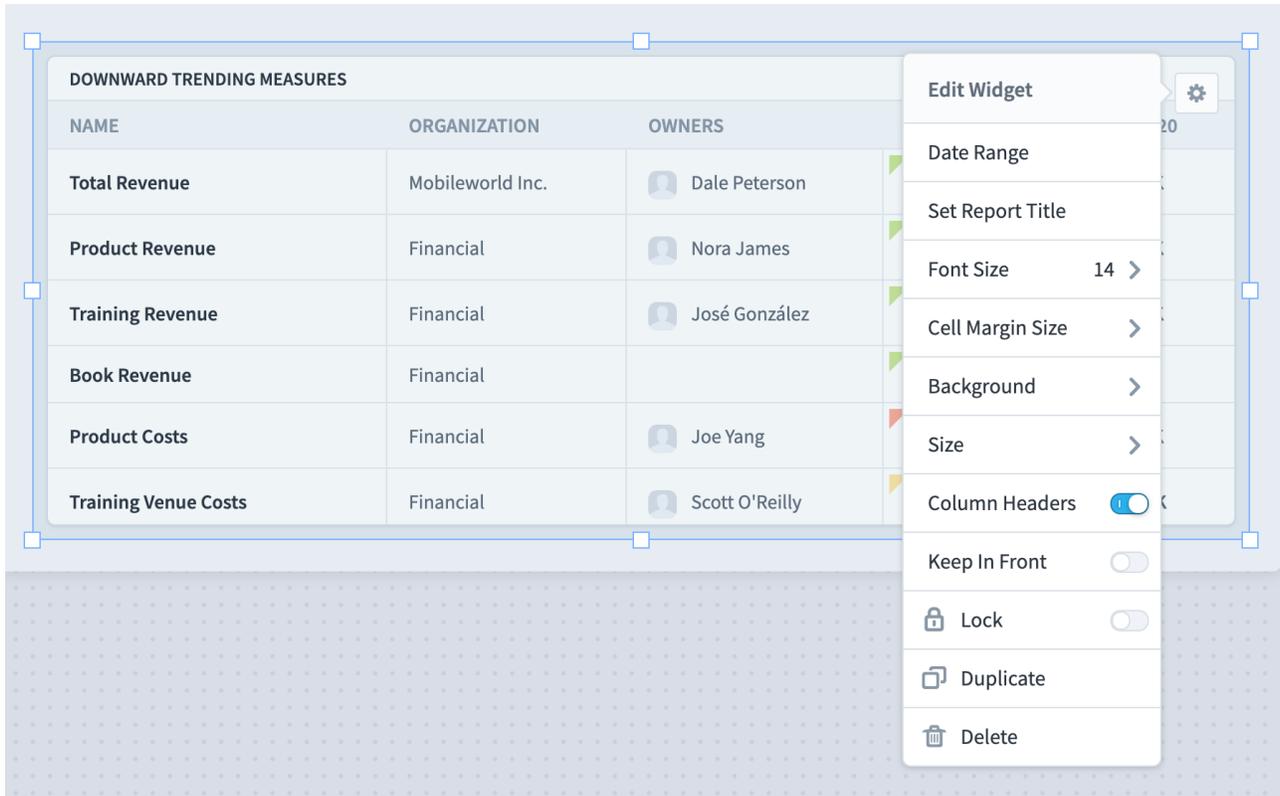
To add a report widget, just choose *Report* in the *Add Widget* menu.



Then choose an existing report that you've already built in the Reports section.



This report has now been copied to your dashboard. It is no longer linked to the report that it came from. Although you can change the date range here on the dashboard, if you want to change report columns or filters, you need to do that in the Reports section and then add it to your dashboard as a new report widget.



Font Size

You can change the font size for report widgets. By default, they show with a size of 14.



Here we've increased the font size so that the data inside of the table is much larger.

MARKETING OVERVIEW REPORT				
NAME	DECEMBER 2018	JANUARY 2019	FEBRUARY 2019	MARCH 2019
Google Search Position	8	7	6	5
Article Mentions	11	9	9	10
Twitter Mentions	49	20	26	48
Facebook Likes	72	200	264	170
Number of Leads	128	131	130	133
Number of Client Meetings	79	75	71	65
Campaign e-Mails Sent	3,512	3,444	3,433	3,443
Telesales Calls Completed	379	375	376	382

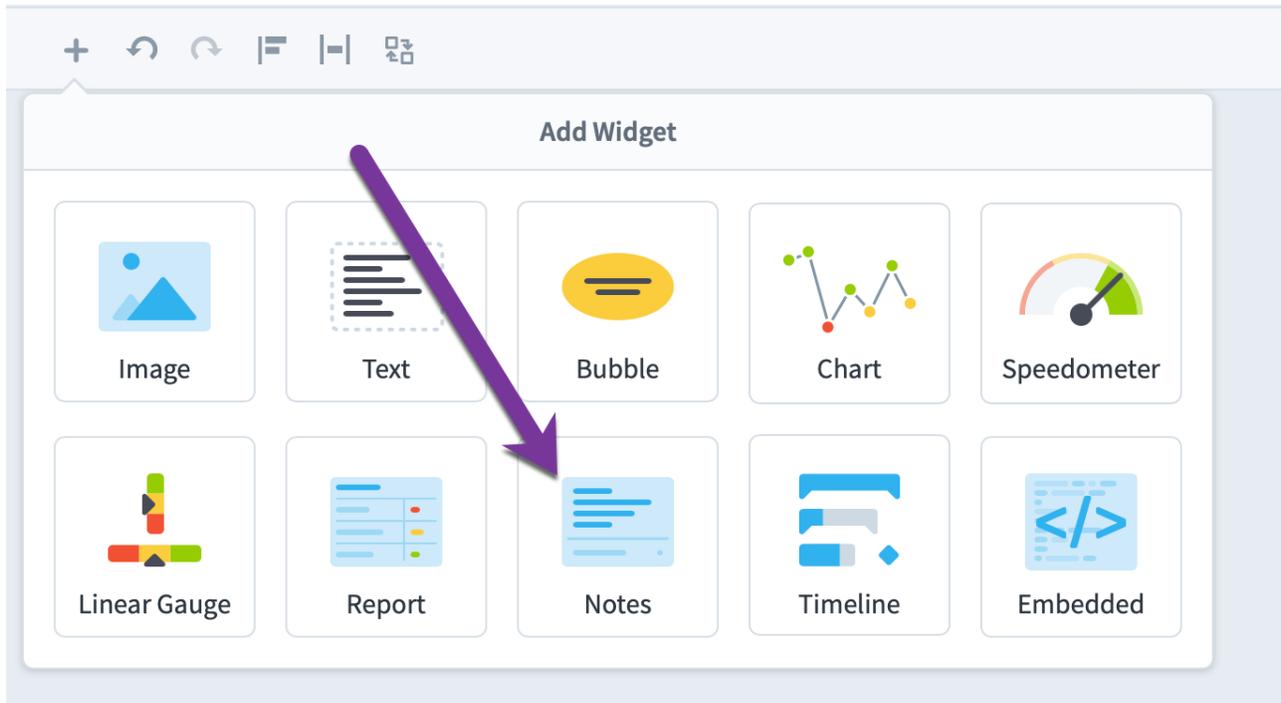
Internal Margins

You can also choose the size the margins inside of the chart table cells. In the example below you can see the same report with Large (default), Medium, and Small margins.

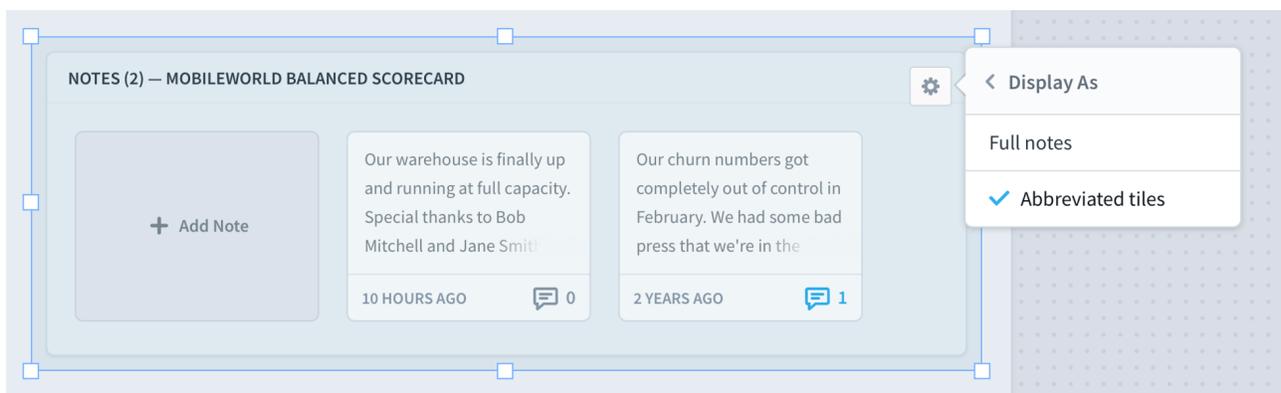
MARKETING OVERVIEW REPORT				
NAME	DECEMBER 2018	JANUARY 2019	FEBRUARY 2019	MARCH 2019
Google Search Position	8	7	6	5
Article Mentions	11	9	9	10
Twitter Mentions	49	20	26	48
Facebook Likes	72	200	264	170
Number of Leads	128	131	130	133
Number of Client Meetings	79	75	71	65
Campaign e-Mails Sent	3,512	3,444	3,433	3,443
Telesales Calls Completed	379	375	376	382

Notes Widgets

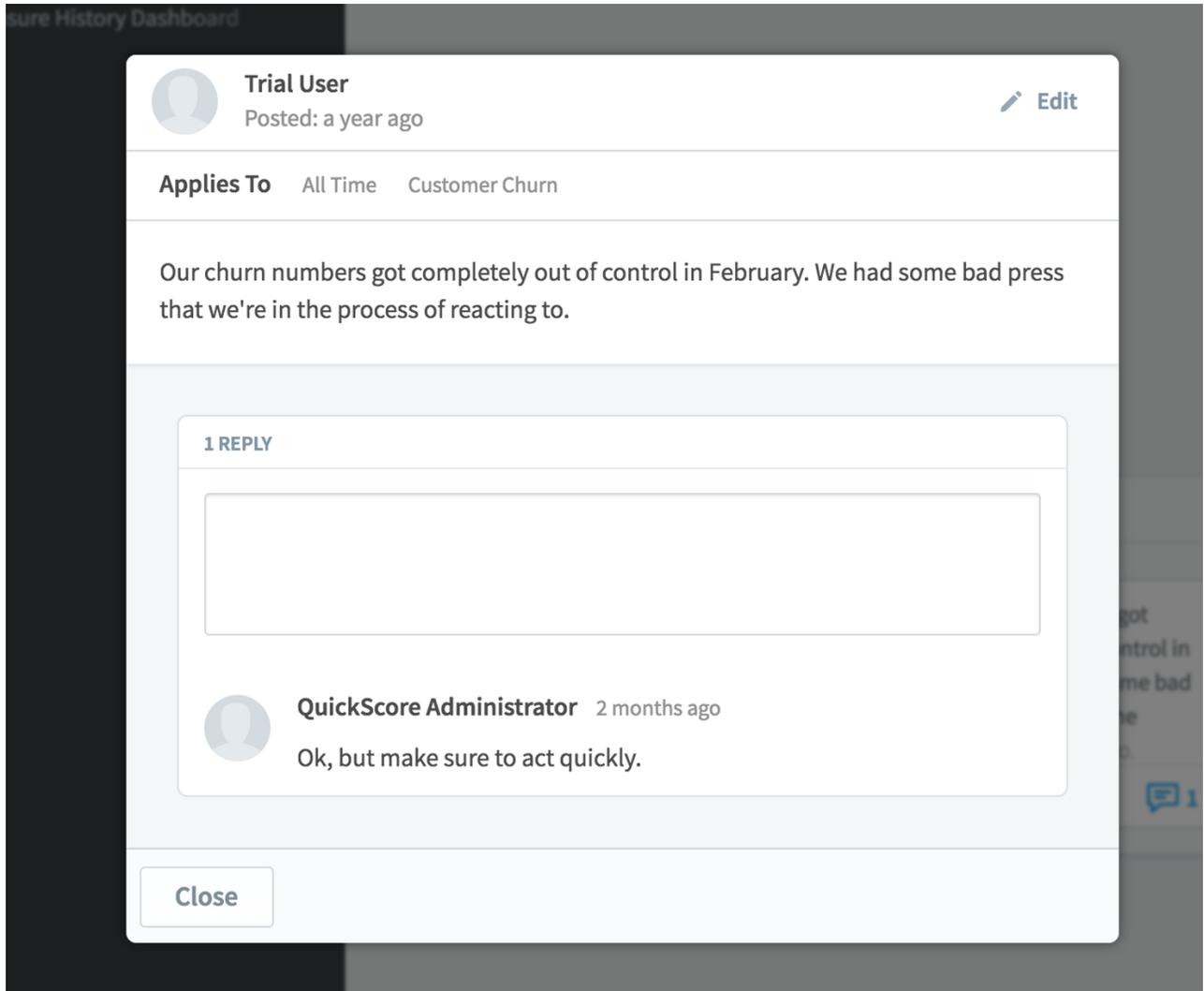
The notes widget allows you to see the notes for a scorecard or initiative item on your dashboard. You can add the widget from the dashboard Add Widget menu.



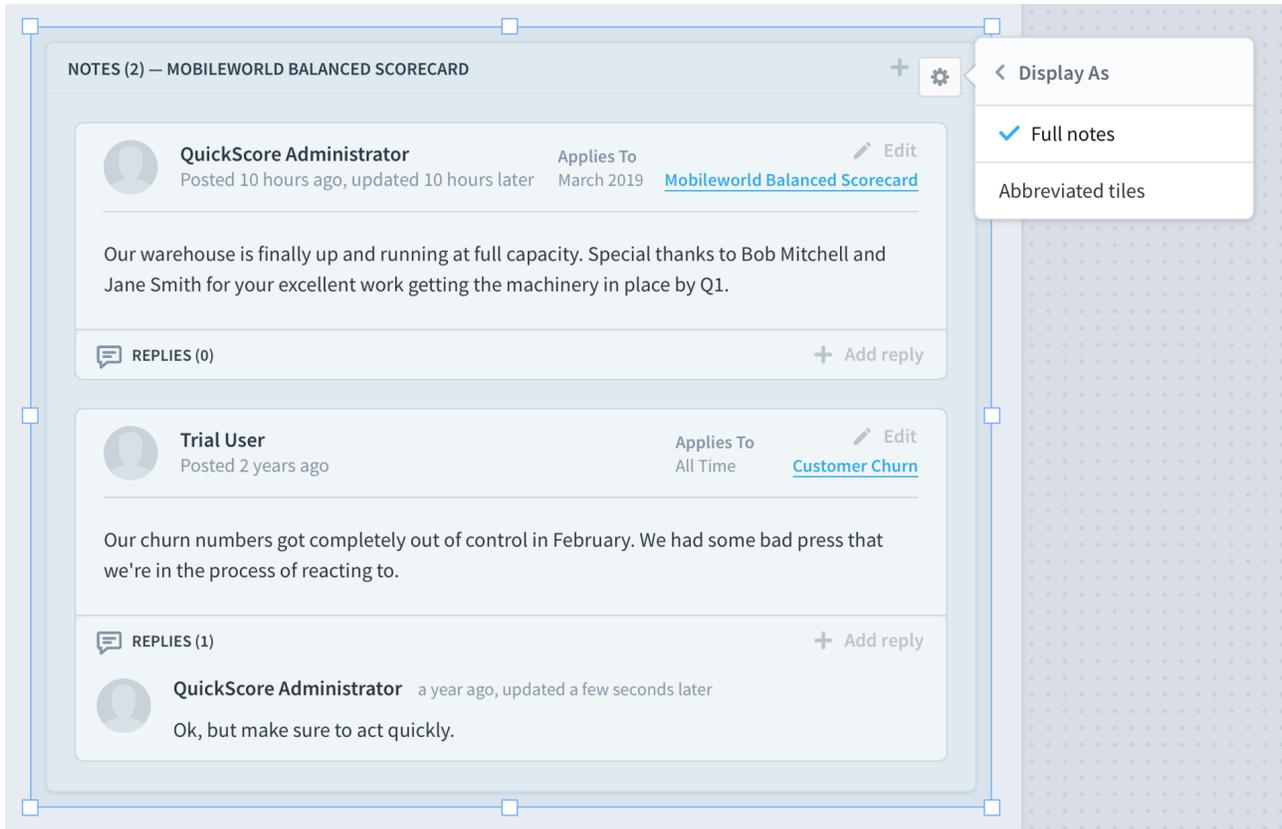
The default "Display As" appearance is "Abbreviated tiles." The widget shows a preview of each note, as well as an icon showing whether there are any replies.



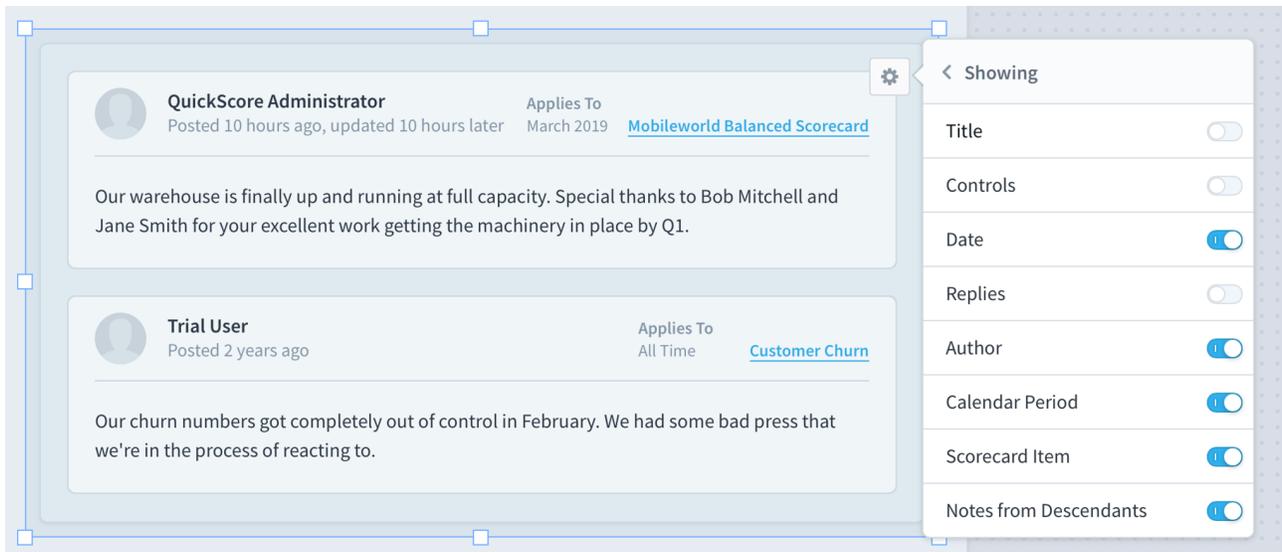
If you click on the tile, it shows the entire note and its replies in a dialog.



If you choose the "Full notes" option, you can now see the entire note and reply text directly on your dashboard.



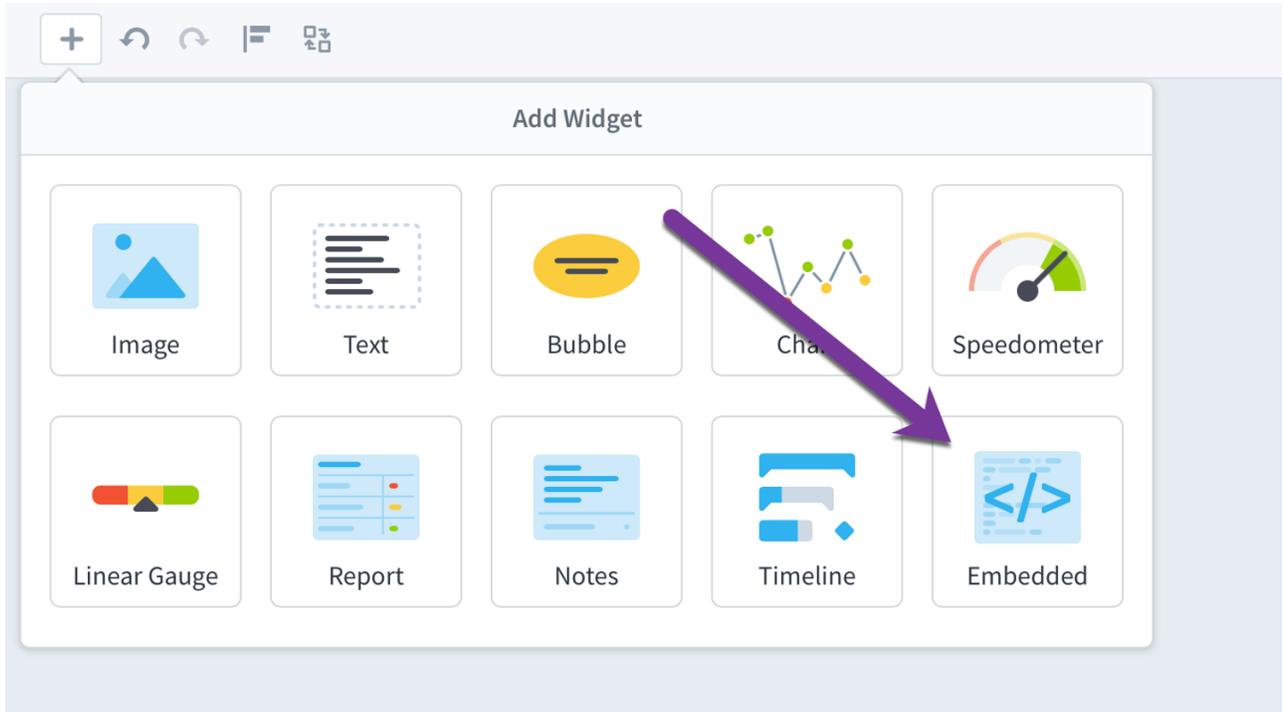
You can choose which things you want to show for each note too. In this example, we've decided not to show the title, replies, or the editing controls.



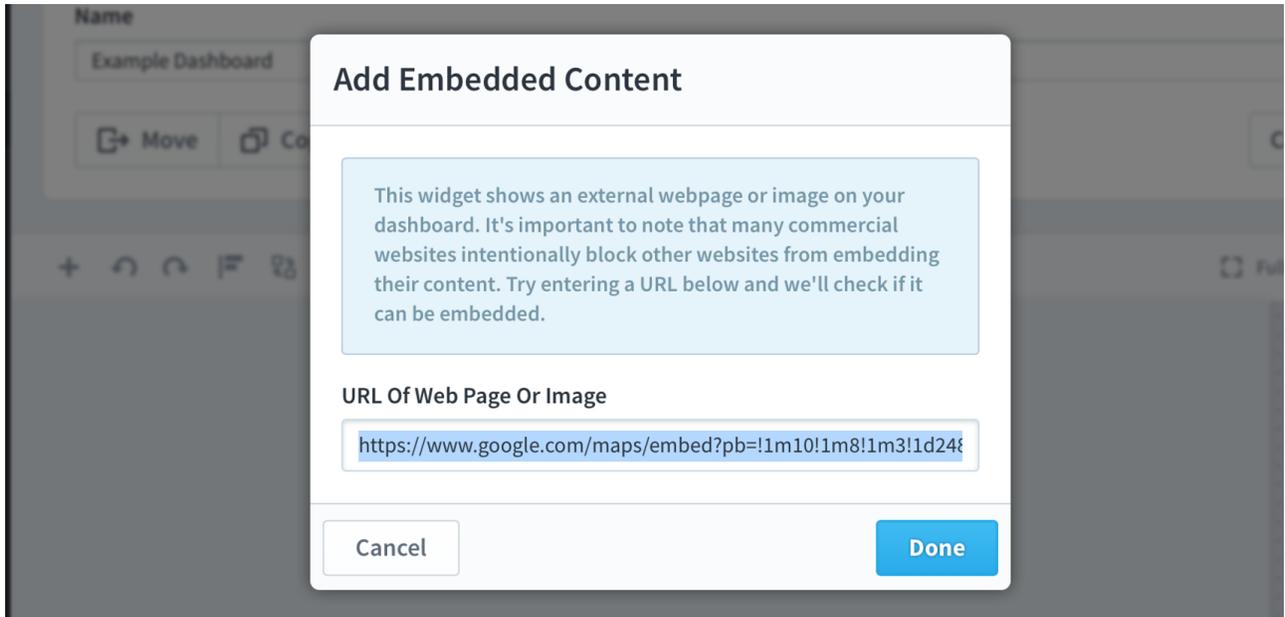
Embedded Content Widgets

Adding an Embedded Content Widget

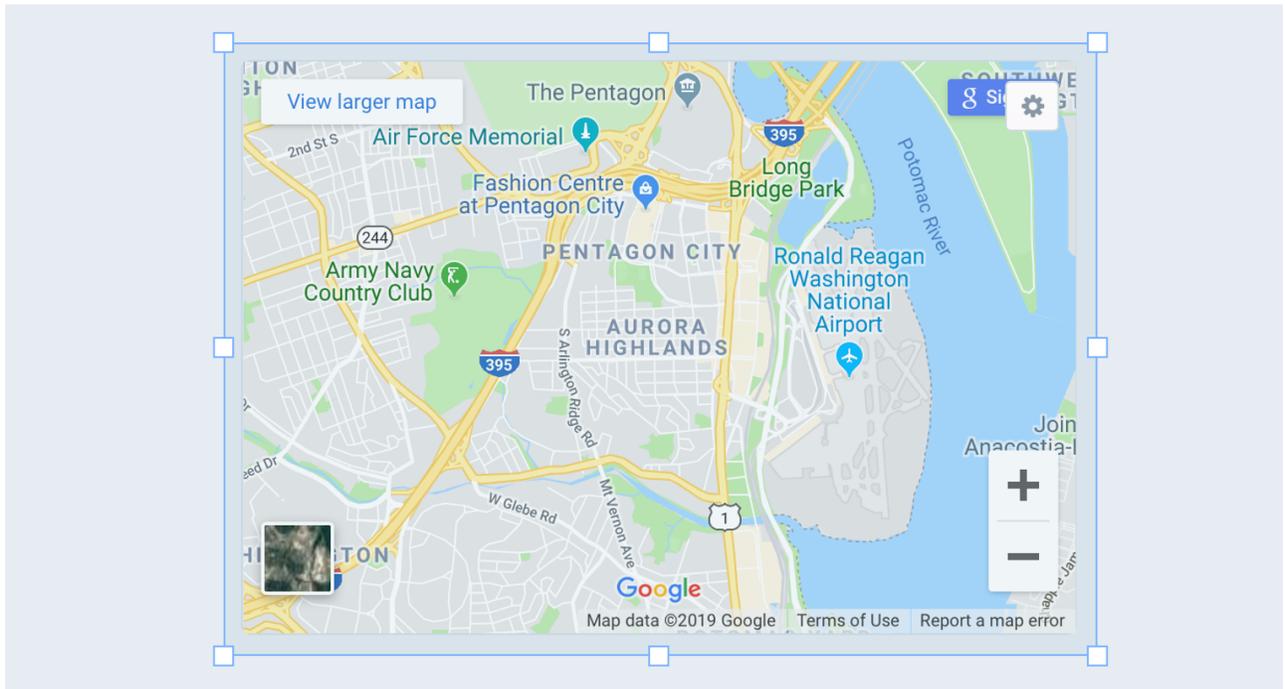
You can add an embedded content widget from the "add widget" menu.



Then, just paste in the URL of the webpage or image that you want to see on your dashboard.



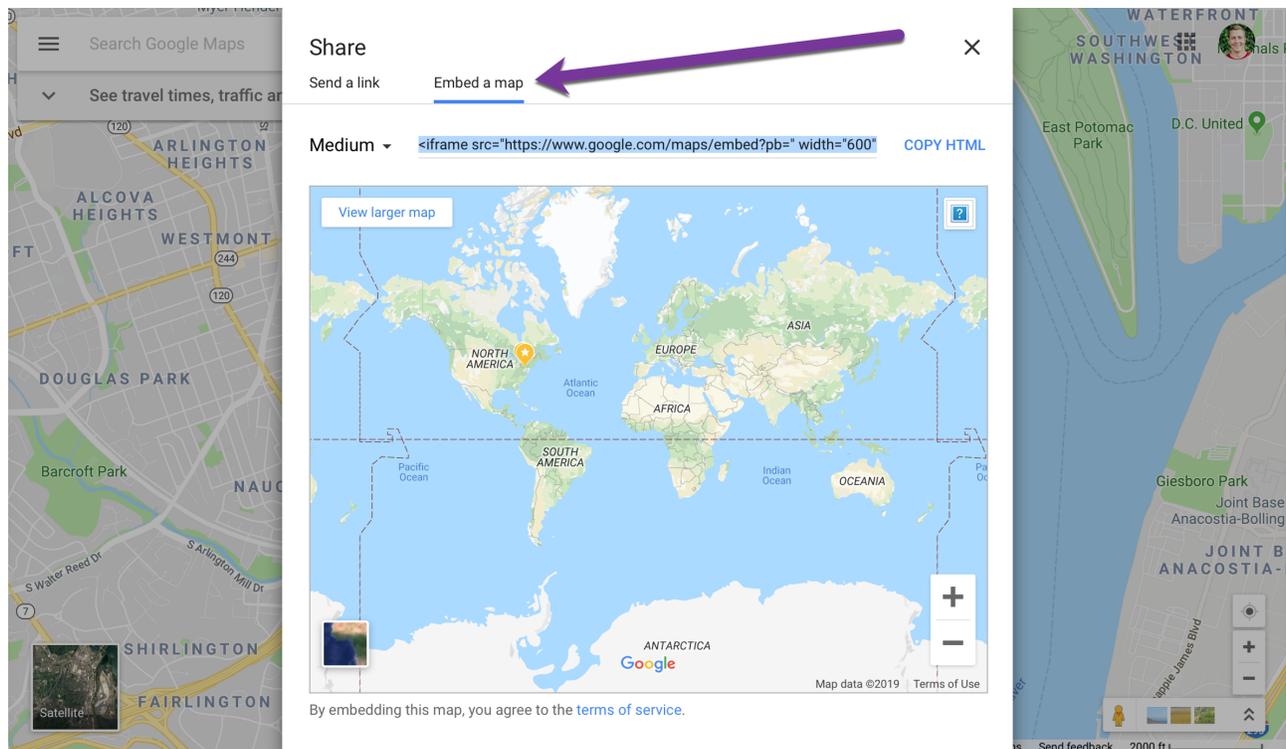
Spider Impact will then show that website or image in a resizable widget.



Sites That Prevent Embedding

It's important to note that many commercial websites [intentionally prevent themselves](#) from being displayed in other websites. Other sites require setting cookies, which don't work with embedded content. Because of this, embedded content widgets work best for content that is designed to be embedded. It's best to think of this as a widget for showing content meant for sharing, not for embedding any website on the internet.

For example, here's the "Embed a map" tab in google maps.



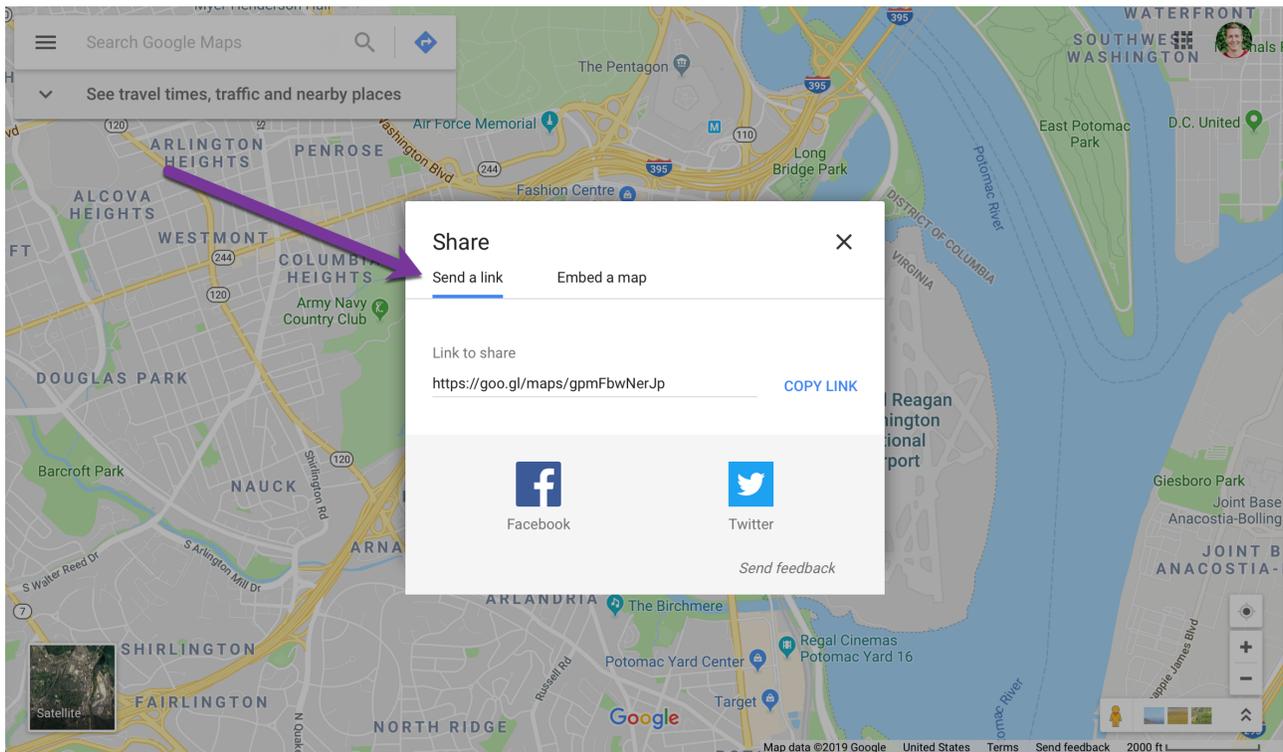
When we copy and paste that code, we get this:

```
<iframe src="https://www.google.com/maps/embed?pb=..."
width="600" height="450" frameborder="0" style="border:0"
allowfullscreen></iframe>
```

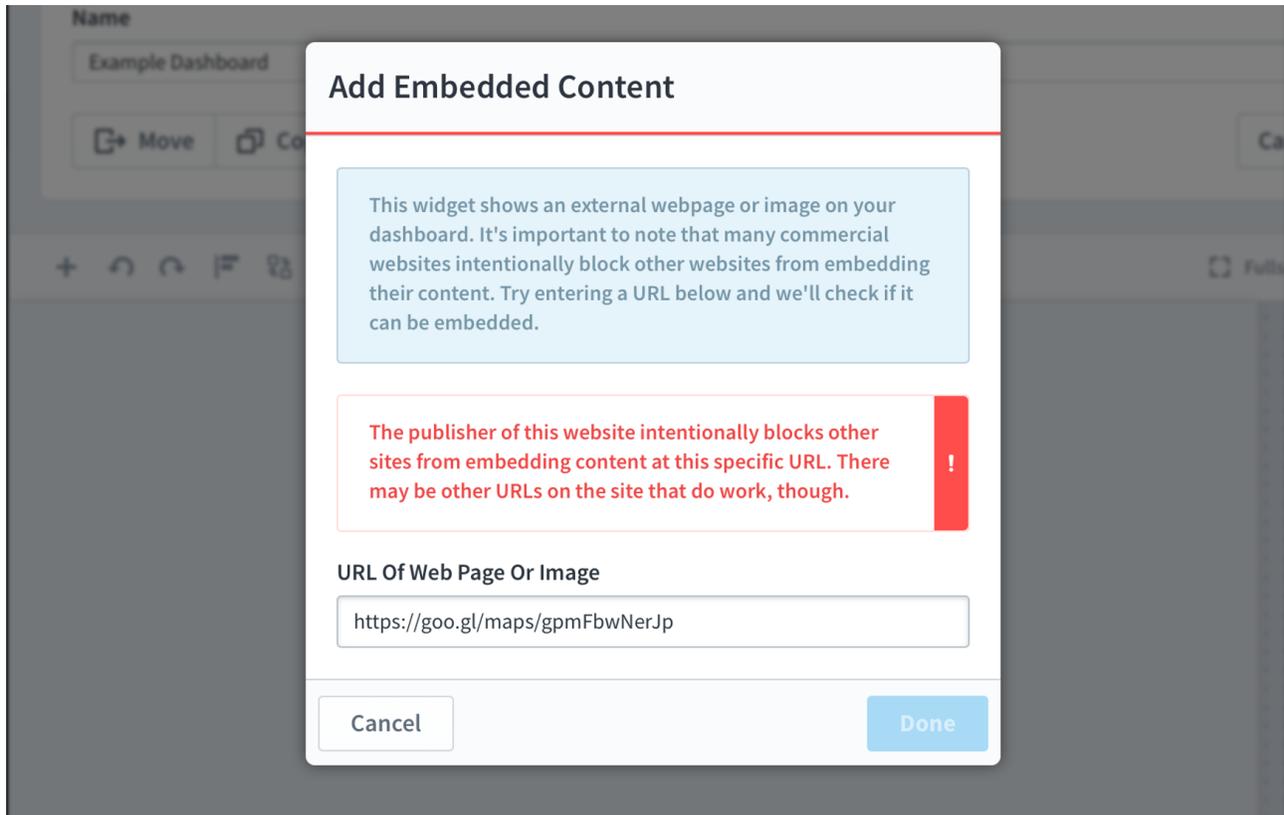
We only want the URL, though, so this part is all we want to paste into the embedded content widget.

```
https://www.google.com/maps/embed?pb=...
```

If, however, we went to the “Send a link” tab in google maps, we’d get a different URL that isn’t designed to be embedded.



When we paste that URL into the embedded content widget, Spider Impact will show an error that looks like this.



Finally, it's important to note that any URL you use has to be HTTPS, not HTTP. Spider Impact is a secure site, and web browsers prevent insecure content from being displayed in secure sites.

Disabling Embedded Content Validation

As you can see, there's a lot that can prevent a web page from showing up inside of Spider Impact. We do our best, however, to explain what's going wrong when it doesn't work. Whenever you paste a URL into an embedded content widget, we check to make sure that the content can be displayed on your dashboard.

There are some situations, however, where Spider Impact can say that you're not authorized to embed a page when you really are. For example, if you're hosting Spider Impact on your own servers (or if you use a VPN or single sign-on), it's possible that the Spider Impact server is being blocked from seeing a page even though you are not. If that's the case, you can turn off "Validate Embedded Dashboard Widgets & Briefing Slides" in Admin > Application Administration.

PERSONAL

- Home 63
- Bookmarks

PRESENTATION

- Strategy Maps
- Dashboards
- Charts & Reports
- Briefings

FOUNDATION

- Scorecards
- Initiatives
- Datasets
- Files

CONFIGURATION

- Scheduled Exports
- Imports
- Import Connections
- Calendars
- Dataset Rollup Trees
- Application Administration**
- Server Administration
- Spider Impact Databases
- License Management

MONITORING

- Diagnostics
- Current User Activity
- View Log Files
- Background Process Status

SCORING

- Notify Owners Of Parents Of Linked Items When Source Is Modified: No
- E-Mail Size Limit (MB):
- Scores Visible: Yes
- Ignore Gray Scorecard Items For Color Rollup: Yes
- Default For Missing Values: Make entire equation blank
- Show N/A Option: Yes
- Scoring Type For Non-KPIs: 3 Color
- Prevent Scorecard Item Changes This Many Days After Archive Date:
- Send Support Request Emails To: helpdesk@spiderstrategies.com
- Year-To-Date Calendar: Yearly
- Show Welcome Message: Yes
- Allowed File Types (Leave Blank To Allow All):
- Hide Error Stack Traces: No
- Validate Embedded Dashboard Widgets & Briefing Slides: Yes

AUTHENTICATION SETTINGS

Cancel Save

Charts & Reports

Overview of Reports

The Basics

Reports show information about many Scorecard or Initiative items at once. For example, you can choose to view all of the downward trending KPIs, or all of the initiatives owned by a particular person.

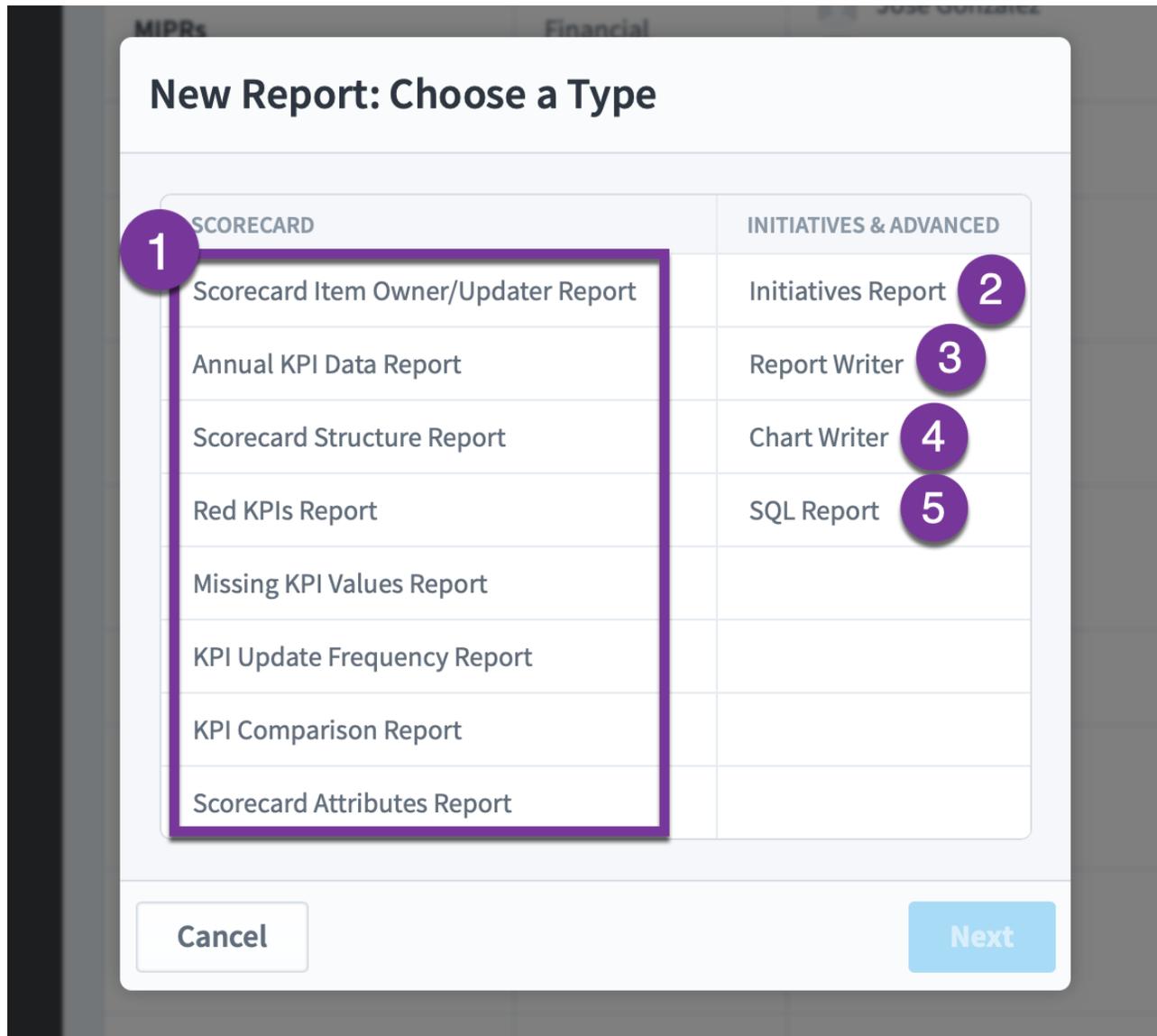
To create a new report, click on the New Report button on the top of the display pane.

The screenshot displays the Spider Impact interface. On the left is a dark sidebar with navigation options: PERSONAL (Home, Bookmarks), PRESENTATION (Dashboards, Charts & Reports, Briefings), and FOUNDATION (Scorecards, Initiatives, Datasets, Files). The 'Charts & Reports' section is active, showing a 'New Report' button highlighted with a purple arrow. Below it is a list of report types: Red KPIs, KPI Comparison Report, Report Writer multiple ancestors, big Report Writer, Downward Trending Measures, Upward Trending Measures, Ad Clicks Chart, By Department, and Scorecard Structure Report.

The main content area is titled 'Red KPIs' and shows a table of reports for 'September 2020'. The table has columns for NAME, ORGANIZATION, OWNERS, and SEPTMBER 2020. A 'Mass Edit' button is located at the bottom right of the table.

NAME	ORGANIZATION	OWNERS	SEPTMBER 2020
Total Revenue	Mobileworld Inc.	Dale Peterson Scott O'Reilly	\$530K
MIPRs	Financial	José González Scott O'Reilly	\$22.9K
Book Production Costs	Financial	Scott O'Reilly	\$8,371
Total Costs	Financial	Scott O'Reilly Susan Murphy	\$325K
% Gross Profit	Financial	José González Scott O'Reilly	55.5%
Salaries & Wages	Financial	Scott O'Reilly Susan Murphy	\$228K
National Insurance	Financial	Scott O'Reilly	\$61.3K
Marketing & Advertising	Financial	Mike Johnson Scott O'Reilly	\$51.5K
Sales & General Admin	Financial	Nora James	\$27.7K

This shows the New Report menu with all of the different types of reports you can create.



1. The 8 reports in the left column are all [pre-built scorecard item reports](#). They require very little input from you and can quickly show you important performance data.
2. The [Initiatives Report](#) shows you data about how your initiatives are performing.
3. [Report Writer](#) is an advanced report designer that allows you to choose not only the columns your report displays, but also which scorecard items.
4. [Chart Writer](#) is an advanced chart designer, allowing you to create a variety of charts, including pie, bar, line, area and polar.
5. The [SQL Report](#) allows you to write raw SQL against any of the import databases you have permission to access. It displays the results as a

standard Report.

Column Sorting

You can sort reports by clicking on column headers. The default sort order is by organization tree order and then scorecard tree order:

AUGUST 2020			
NAME	SCORE	KPI VALUE	GOAL
Mobileworld Balanced Scorecard	 6.03		
Financial	 6.73		
Increase Revenue	 4.91		
Product Revenue	 0.23	 \$436K	 \$465K
Training Revenue	 6.93	 \$260K	 \$260K
Book Revenue	 9.13	 \$43.7K	 \$40K
Total Revenue	 3.35	 \$740K	 \$765K
Improve Profitability	 6		
Net Operating Profit (before tax)	 9.7	 \$85.8K	 \$75.4K
% Net Operating Profit	 2.3	 8.17%	 10%
Reduce Sales Overhead Cost	 10		
Sales & General Admin	 10	 \$2,263	 \$30.2K

Clicking on a column header like Score sorts performance in ascending order and reveals those areas of most concern:



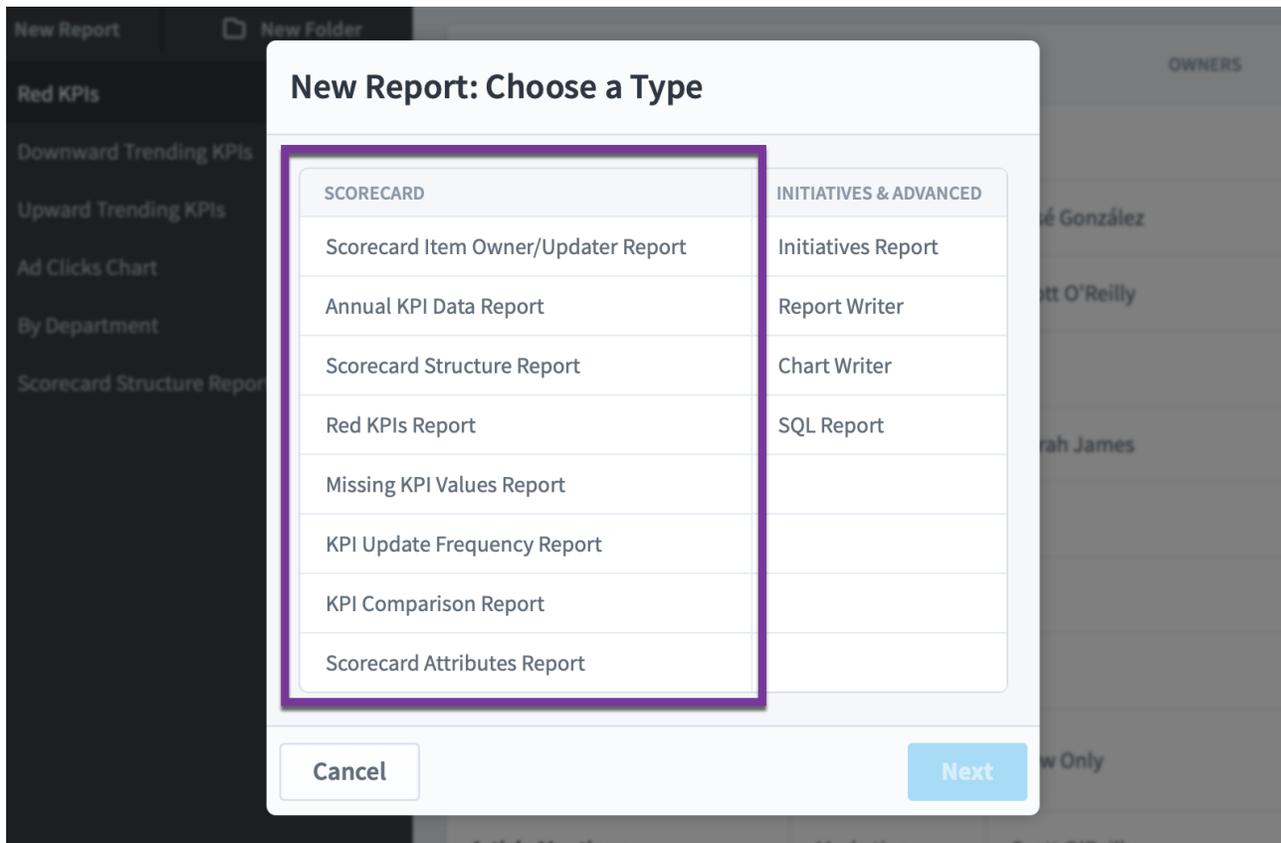
AUGUST 2020			
NAME	SCORE ^	KPI VALUE	GOAL
Product Revenue	0.23	\$436K	\$465K
Contract management risk index	0.53	13.2%	50%
Campaign e-Mails Sent	0.93	3,328	3,500
Improve Customer Retention	2.08		
Customer Churn	2.08	3.75%	1%
Improve Contract Management	2.27		
% Net Operating Profit	2.3	8.17%	10%
Improve Marketing Output	2.55		

Clicking on the Score column again switches the sort order to descending so the best performance is at the top:

AUGUST 2020			
NAME	SCORE 	KPI VALUE	GOAL
Reduce Sales Overhead Cost	 10		
Sales & General Admin	 10	 \$2,263	 \$30.2K
SEO Project Spend to Date	 10	 332K	 5,000
Net Operating Profit (before tax)	 9.7	 \$85.8K	 \$75.4K
Book Revenue	 9.13	 \$43.7K	 \$40K
Improve Market Awareness	 8.89		
Improve IT Effectiveness	 8.43		
IT effectiveness index	 8.43	 99.59%	 98%

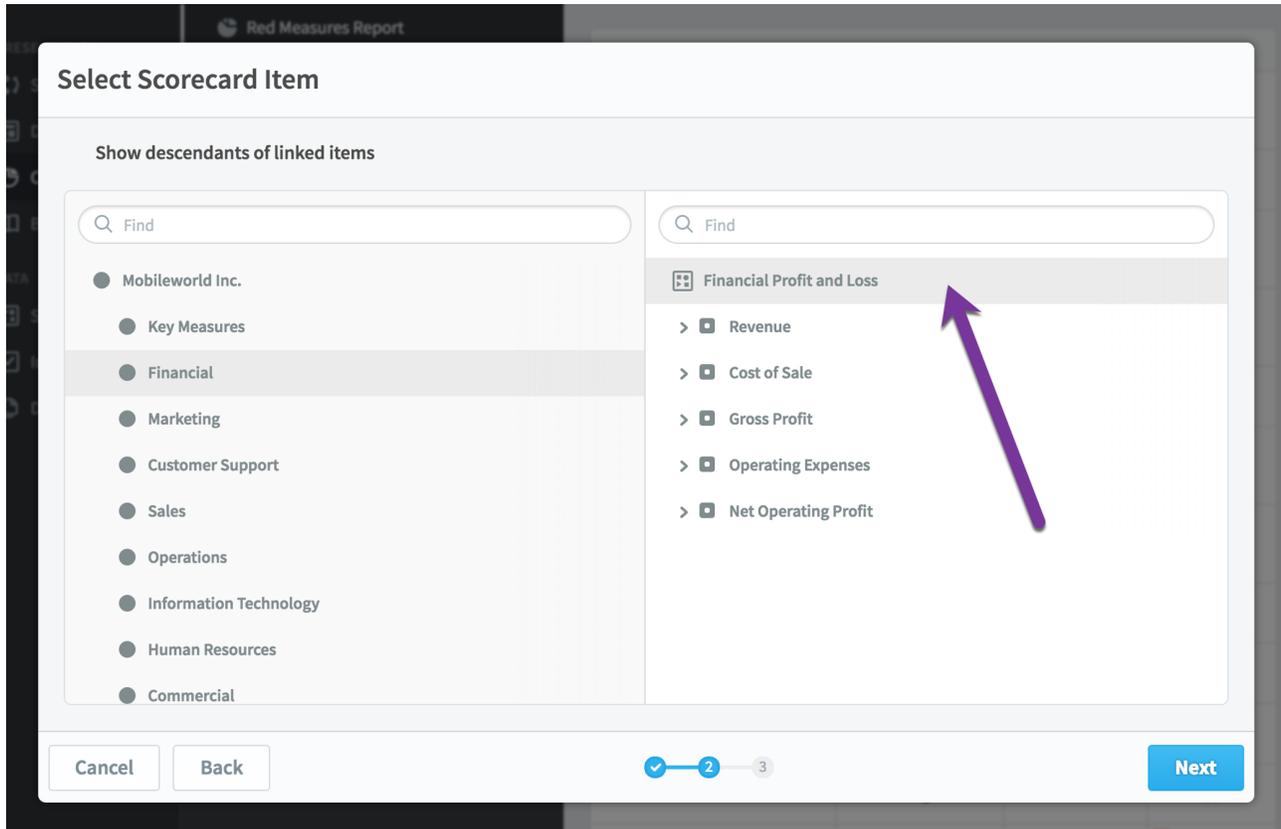
Clicking a third time removes the sort and reverts to the default sorting.

Prebuilt Scorecard Reports



Scorecard Item Owner/Updater Report

The owner/updater report shows all of the owners and/or updaters for the scorecard items you choose. The first step is to choose a scorecard item, and here we're choosing an entire scorecard.



Next you choose what you want the report to show.

Scorecard Item Owner/Updater Report

CHOOSE USERS OR GROUPS

Any User Or Group
 Specific Users Or Groups

CHOOSE THE DATA TO VIEW

Responsibility Type

Owners or Updaters

Include Measures Only

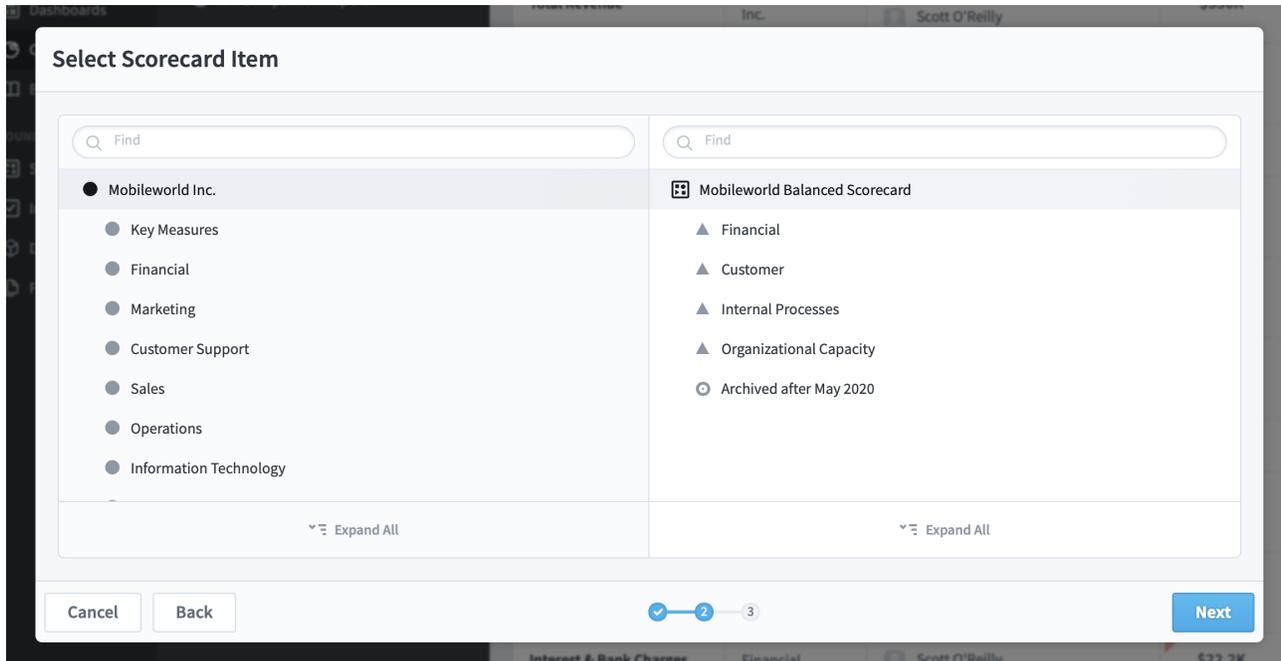
✓ — ✓ — 3

When you're done you see a report like this.

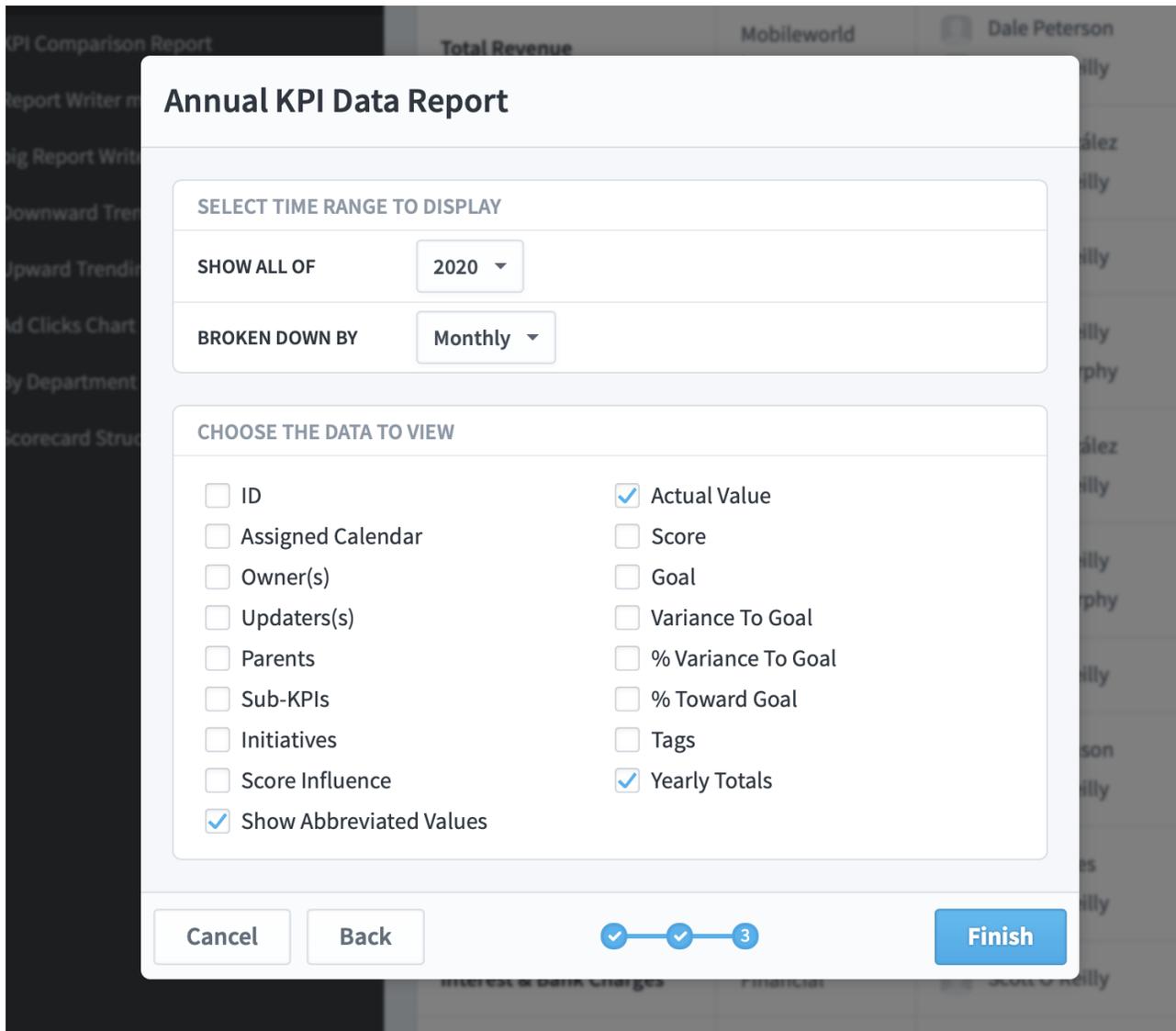
NAME	ORGANIZATION	OWNERS	UPDATERS
Financial Profit and Loss	Financial	Nora Roberts	
Revenue	Financial	Nora Roberts	
Product Revenue	Financial	Nora Roberts	Nora Roberts Viewer Only (Communication Users)
Training Revenue	Financial		Viewer Only (Communication Users)
Book Revenue	Financial		Viewer Only (Communication Users)
Product Costs	Financial	Joe Abercrombie	
Total Gross Profit	Financial	Trial User	

Annual KPI Data Report

This is similar to the data shown on the Scorecards KPIs tab. The first step in building the report is choosing which scorecard item you want to show the KPIs for.



The next step is choosing what data should be shown on the report. The defaults only show the actual values and yearly totals.



When you're done you'll see a report that looks like this:

Annual KPI Data Report

KPI	JAN 2020	FEB 2020	MAR 2020	APR 2020	MAY 2020	JUN 2020	JUL 2020	AUG 2020	SEP 2020	OCT 2020	NOV 2020	DEC 2020
Base Funding	469K	465K	470K	465K	469K	464K	7	472K	464K	466K	463K	45
MIPRs	\$1,250	\$4,850	\$6,650	\$10.1K	468,500	\$14.7K	\$16K	\$19.7K	\$22.9K	\$25.8K	\$29.2K	\$32
UFRs	\$43.8K	\$45.3K	\$43.2K	\$44.2K	\$45.9K	\$45.6K	\$42.1K	\$42.9K	\$40.9K	\$43.7K	\$46	
Total Revenue	\$514K	\$515K	\$520K	\$520K	\$528K	\$524K	\$61.5K	\$533K	\$530K	\$532K	\$536K	\$5
Net Operating Profit (before tax)	\$84.4K	\$91.8K	\$88.9K	\$87.3K	\$87K	\$82.4K	\$83.3K	\$90.5K	\$88.6K	\$88.3K	\$85.5K	\$8
% Net Operating Profit	10.8%	10.9%	10.3%	10.6%	10.9%	10.2%	10.9%	10.6%	10.1%	10.6%	11.6%	11.

Scorecard Structure Report

The Scorecard Structure Report doesn't show any kind of performance data. It's all about the structure of your scorecard. To build the report, first choose a scorecard item. In this example we're going to choose an entire scorecard.

Select Scorecard Item

Show descendants of linked items

Find

- Mobileworld Inc.
 - Key Measures
 - Financial
 - Marketing
 - Customer Support
 - Sales
 - Operations
 - Information Technology

Expand All

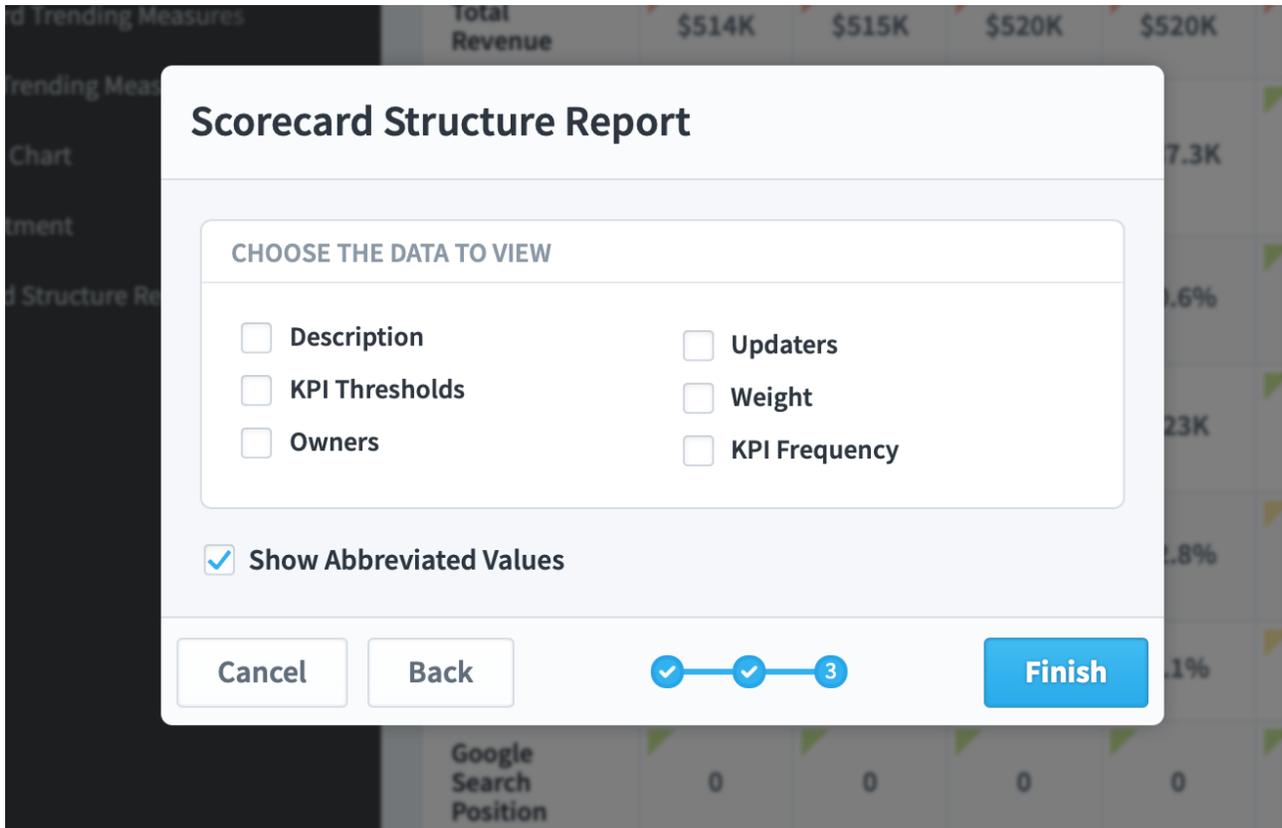
Find

- Mobileworld Balanced Scorecard
 - > ▲ Financial
 - > ▲ Customer
 - > ▲ Internal Processes
 - > ▲ Organizational Capacity
 - Archived after May 2020

Expand All

Cancel Back 2 3 Next

Then you choose what information you want to show. By default it doesn't include any of these extras.



When you click Finish you'll see a report that looks like this.

Mobileworld ▼ **Scorecard Structure Report** E

PERSONAL

- Home 63
- Bookmarks

PRESENTATION

- Dashboards
- Charts & Reports**
- Briefings

FOUNDATION

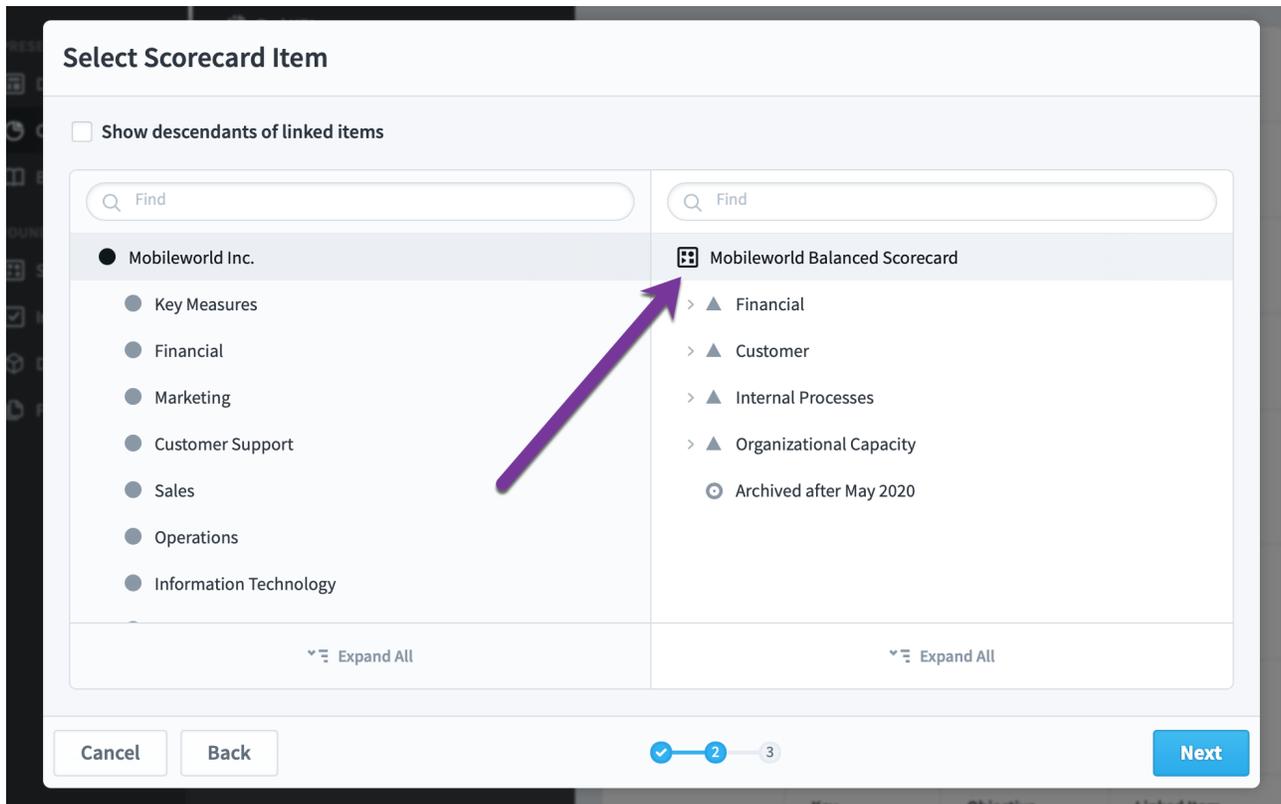
- Scorecards
- Initiatives
- Datasets
- Files

View Edit **September 2020** ◀ ▶

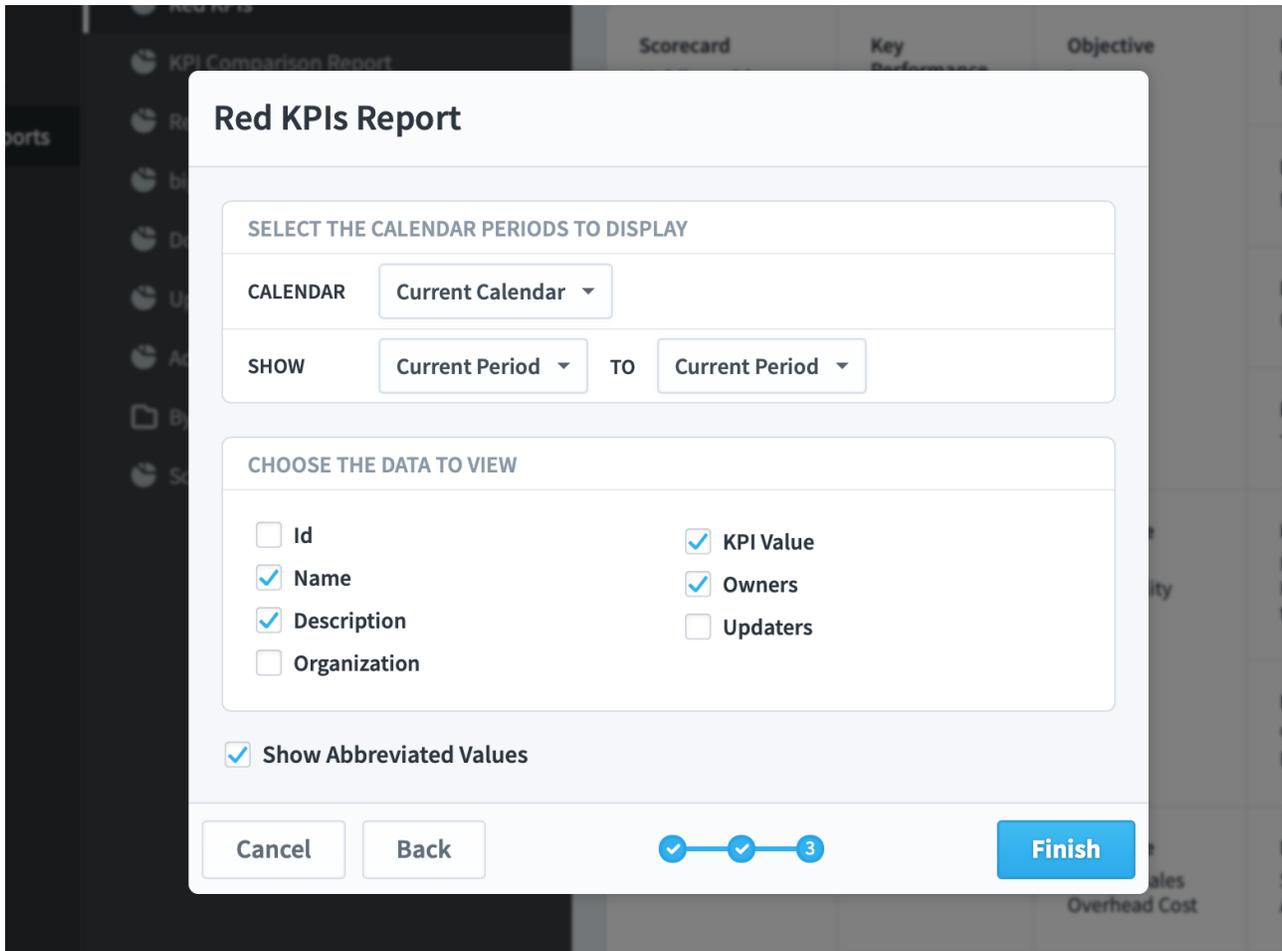
Scorecard	Key Performance Area	Objective	Linked Item	
Mobileworld Balanced Scorecard	Financial	Increase Revenue	Linked Item Base Funding	
			Linked Item MIPRs	
			Linked Item UFRs	
			Objective Improve Profitability	KPI Total Revenue
				Linked Item Net Operating Profit (before tax)
				Linked Item % Net Operating Profit
			Objective Reduce Sales Overhead Cost	Linked Item Sales & General Admin
	Key Performance Area Customer	Objective Improve Customer Satisfaction	Linked Item Customer Satisfaction Survey	
		Objective	Linked Item	

Red KPIs Report

The Red KPIs report is probably the most popular report in Spider Impact and shows you all of your underperforming KPIs. The first step is to choose a scorecard item. Here we're going to show all red KPIs for the entire Mobileworld scorecard.



You then choose your display options. Most of the time the defaults will work just fine.

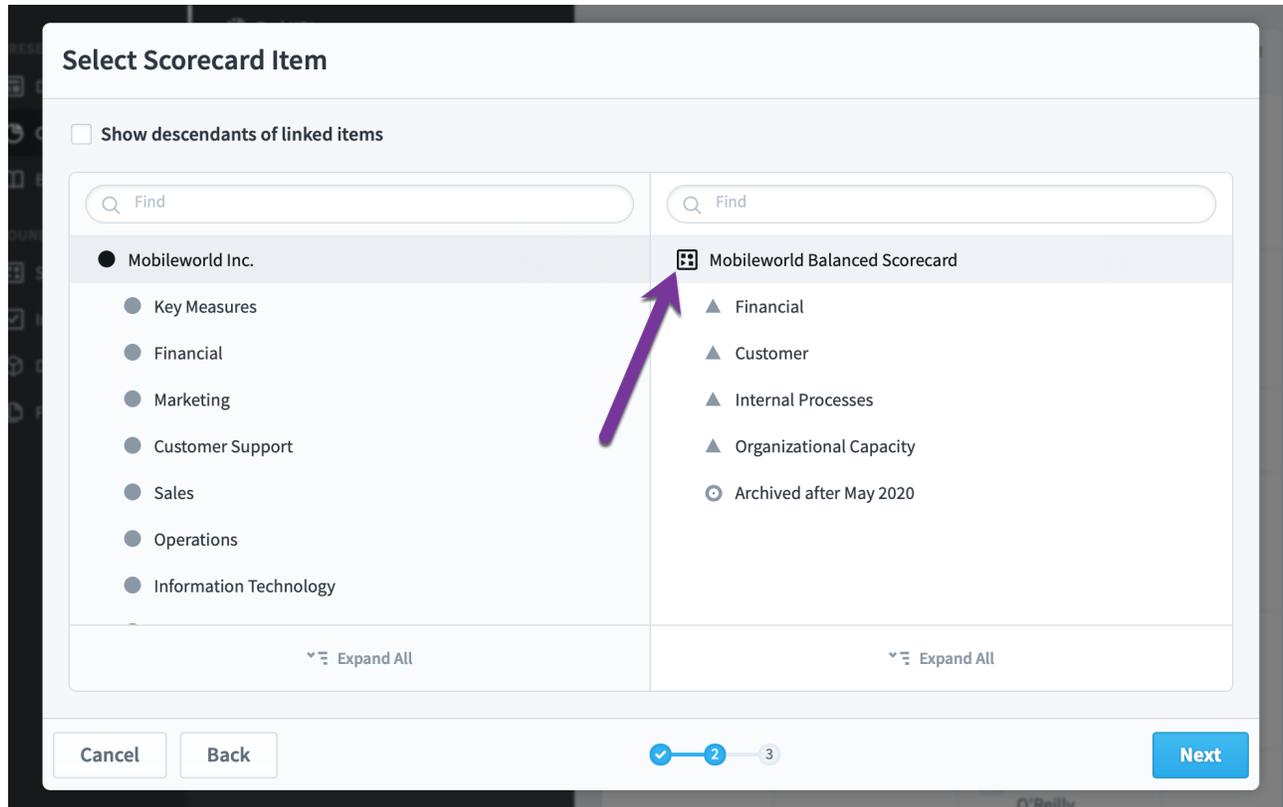


When you click Finish you'll see a report that looks like this:

NAME	DESCRIPTION	OWNERS	SEPTEMBER 2020
Total Revenue	This measure sums: - Product Revenue - Training Revenue - Book Revenue	Dale Peterson Scott O'Reilly	\$530K
MIPRs	Here's a description for training revenue	José González Scott O'Reilly	\$22.9K
Book Production Costs		Scott O'Reilly	\$8,371
Total Costs		Scott O'Reilly Susan Murphy	\$325K

Missing KPI Values Report

The Missing KPI Values Report shows you all KPIs that haven't been updated for a particular time period. To start, you need to choose a scorecard item. Here we're going to run the report for the entire Mobileworld Scorecard.



Next you choose your display options. The defaults work great most of the time.

Missing KPI Values Report

SELECT THE CALENDAR PERIODS TO DISPLAY

CALENDAR Current Calendar

SHOW Current Period TO Current Period

CHOOSE THE DATA TO VIEW

Id KPI Value

Name Owners

Description Updaters

Organization

Show Abbreviated Values

Cancel Back 1 2 3 Finish

When you're done you'll see a report like this:

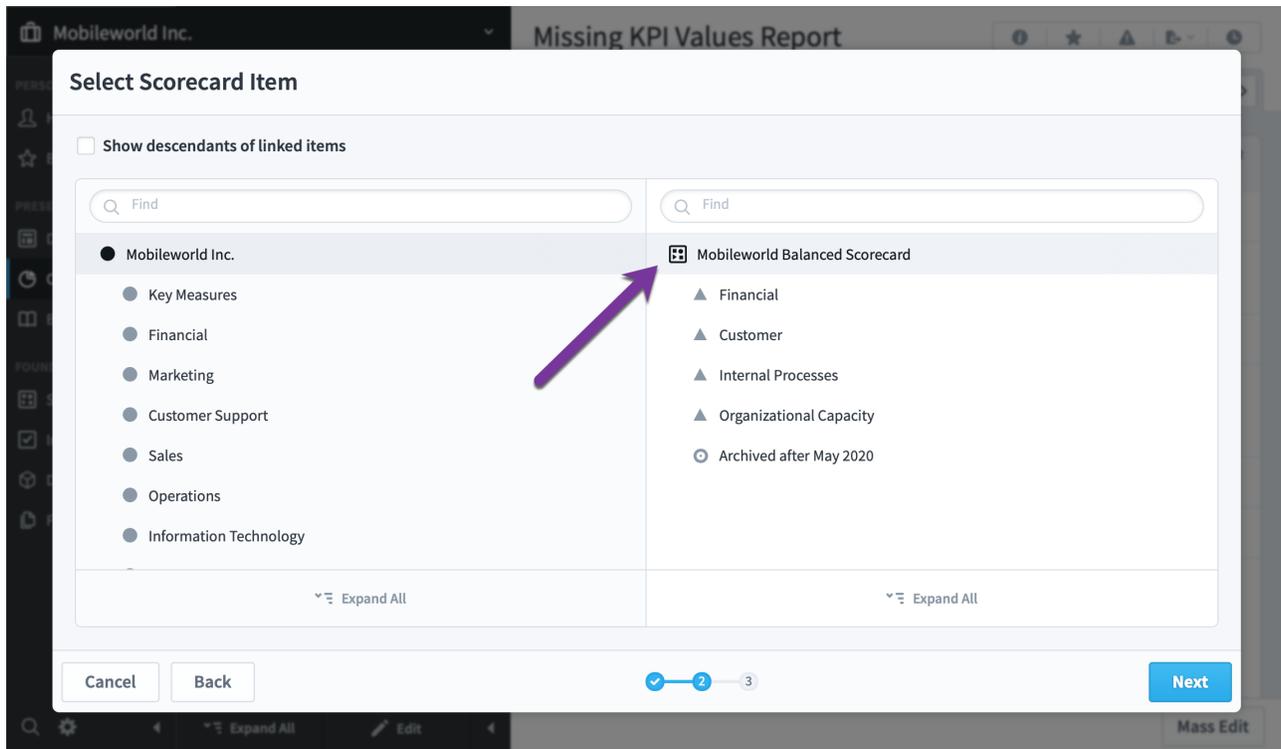
Missing KPI Values Report

View Edit September 2020

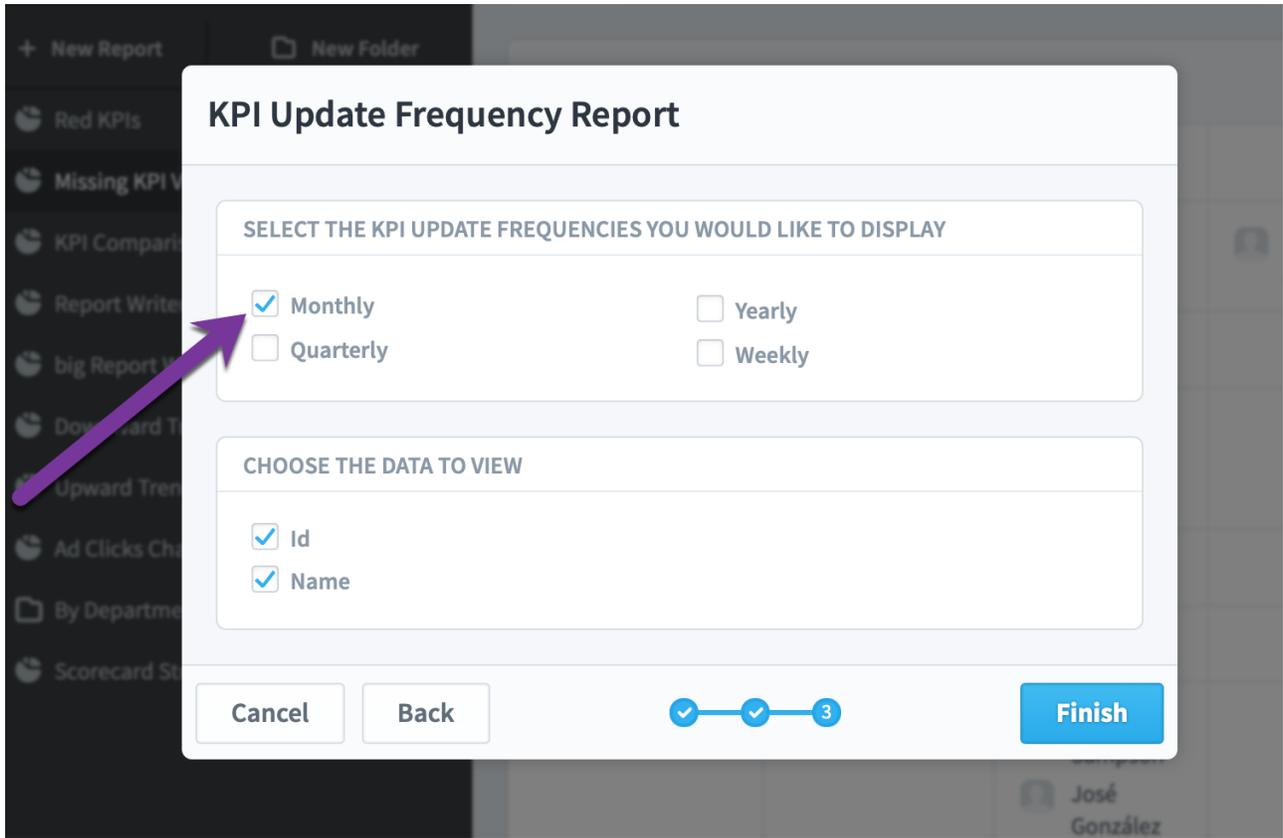
NAME	DESCRIPTION	OWNERS	UPDATERS	SEPTEMBER 2020
Test KPI				
KPI			SMS Administrator	
Base Funding				
MIPRs	Here's a description for training revenue			
UFRs				
Production Costs				

KPI Update Frequency Report

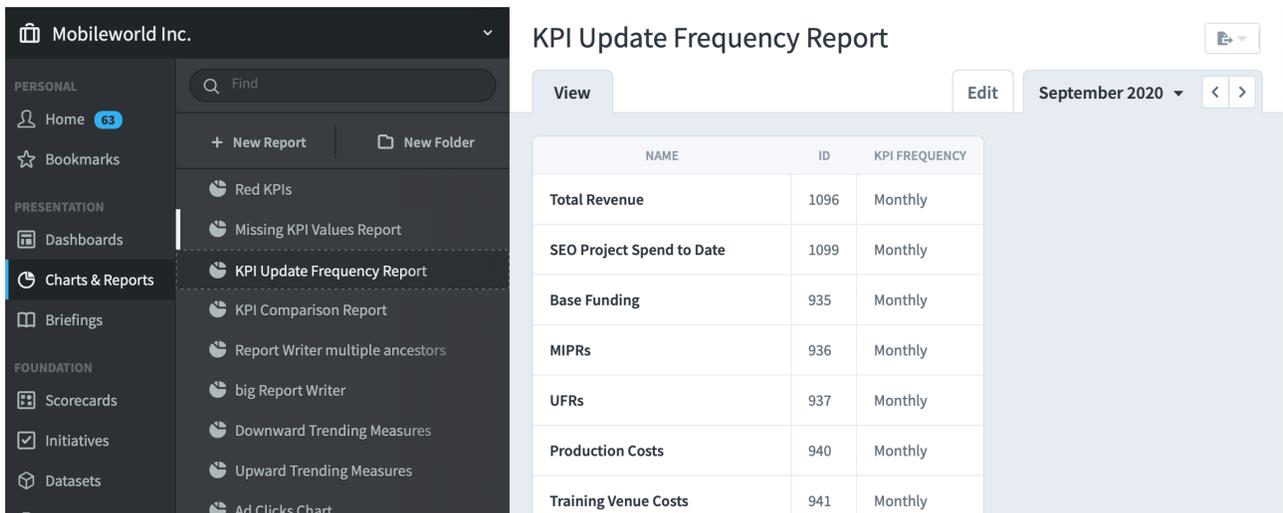
The KPI Update Frequency Reports shows you all of your KPIs that match a particular update frequency. First we'll choose the entire Mobileworld Scorecard.



Then we'll choose which frequencies we want. In this example we'll choose Monthly.

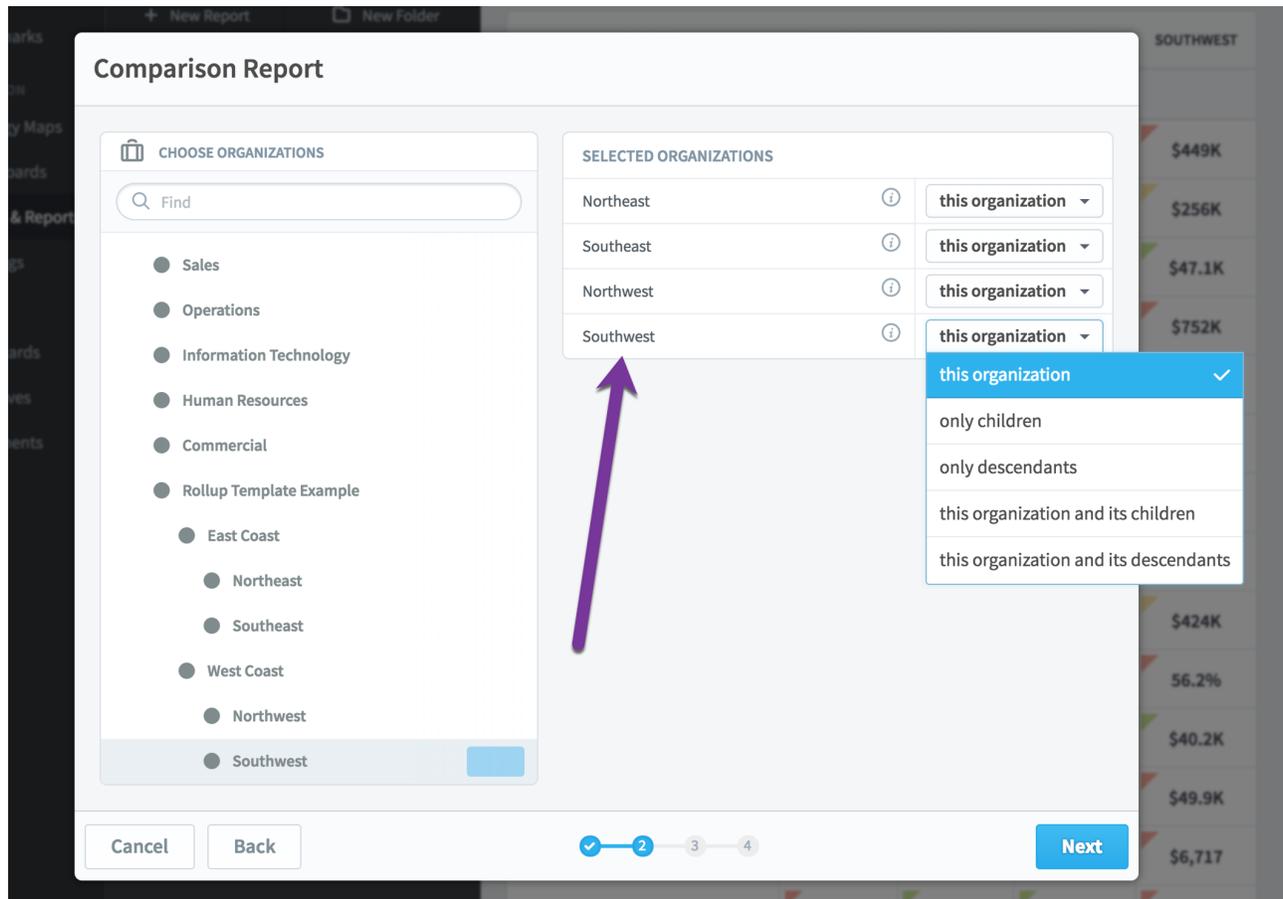


When we click Finish it shows a list of all monthly KPIs in that scorecard.

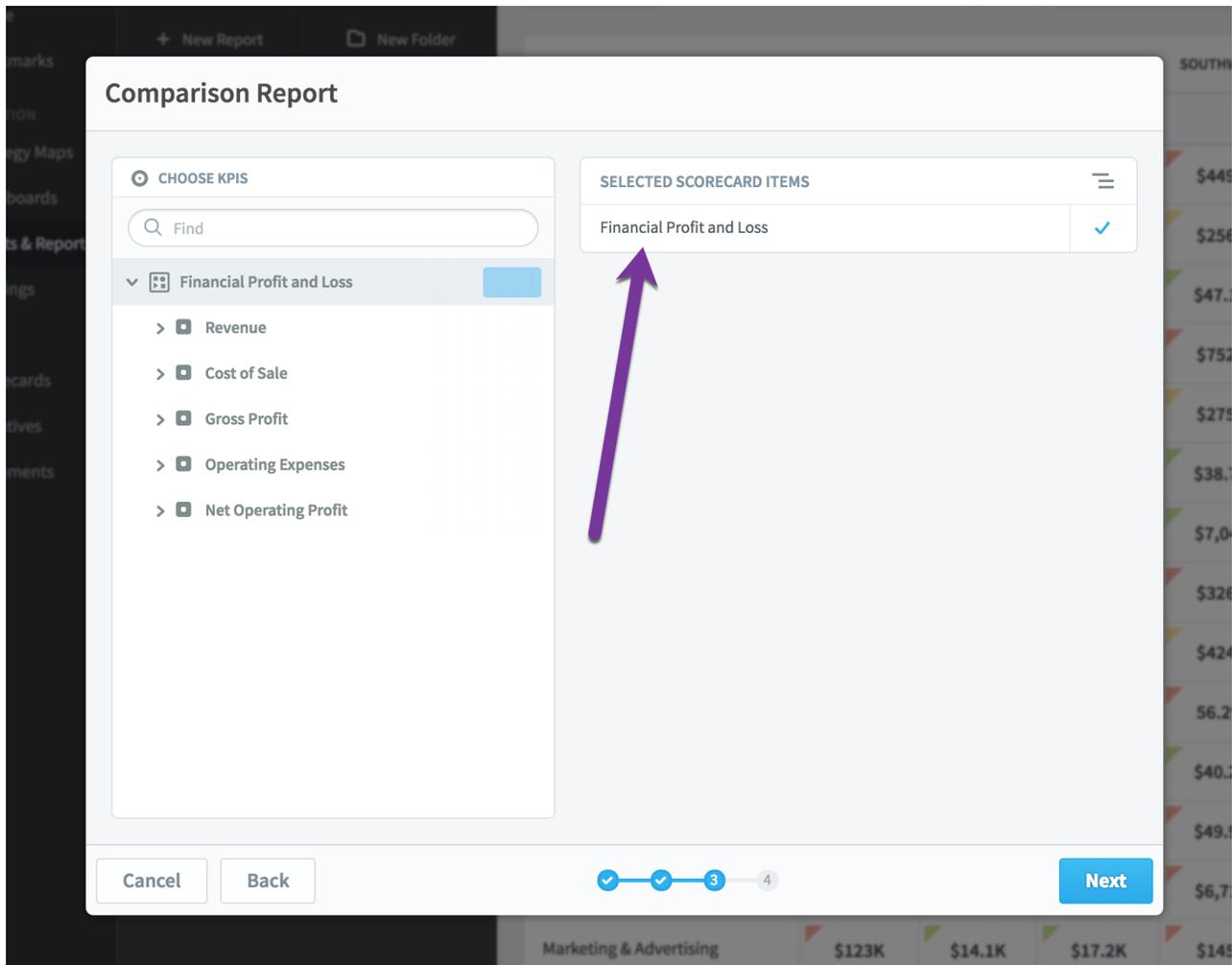


KPI Comparison Report

The KPI comparison report is used to compare organizations that have similar KPIs. The first step in the wizard is to choose which organizations you want to see in your report. You can either select each organization one at a time, or you can automatically include an organization's descendants.



Once you've selected your organizations, the next step is to choose your KPIs. Here I've selected the scorecard root, which will automatically include all of the KPIs.

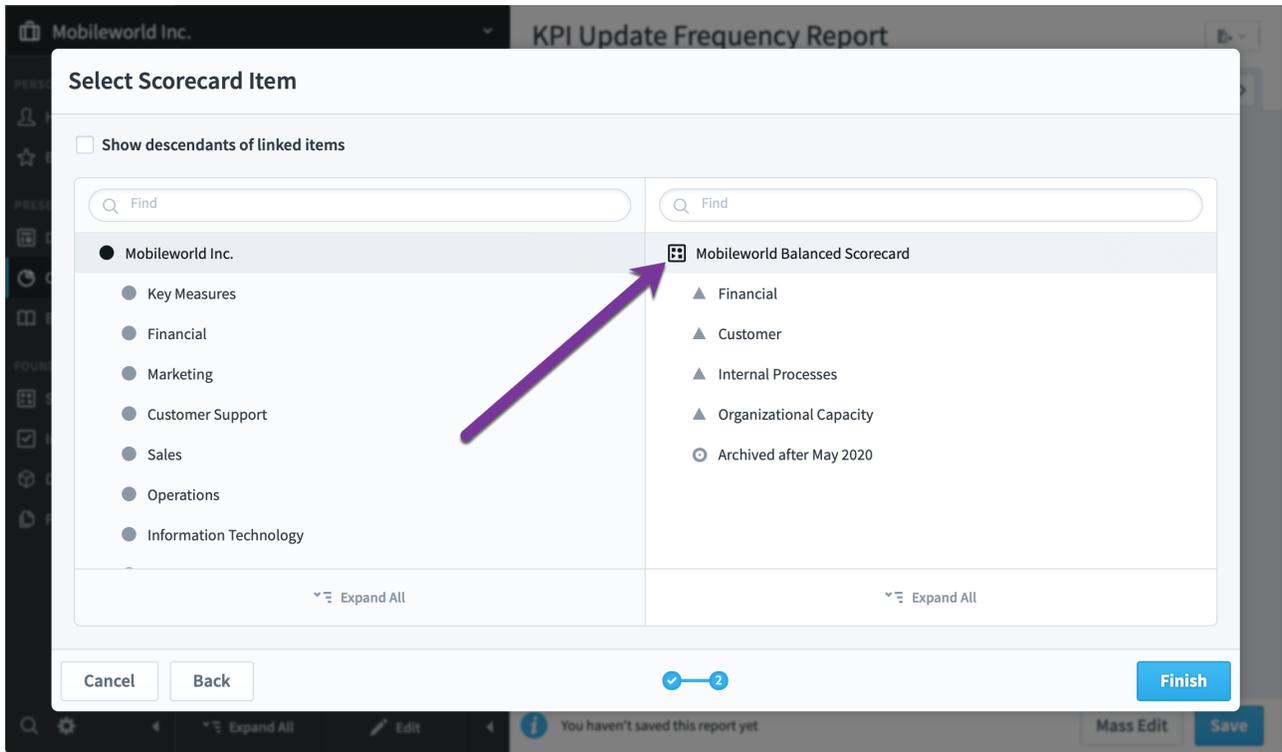


When we're done we see a report with all of the KPIs for each of the four selected organizations.

	NORTHEAST	SOUTHEAST	NORTHWEST	SOUTHWEST
FINANCIAL PROFIT AND LOSS				
Product Revenue	\$476K	\$448K	\$444K	\$449K
Training Revenue	\$248K	\$255K	\$257K	\$256K
Book Revenue	\$29.9K	\$38.6K	\$42.9K	\$47.1K
Total Revenue	\$754K	\$742K	\$744K	\$752K
Product Costs	\$274K	\$277K	\$274K	\$275K

Scorecard Attributes Report

The Scorecard Attributes Report doesn't show any performance information. Instead, it shows you information like the owners, updaters, and KPI frequency of multiple scorecard items at once. To run the report, all you have to do is choose a scorecard item. Here we've selected the entire Mobileworld scorecard.



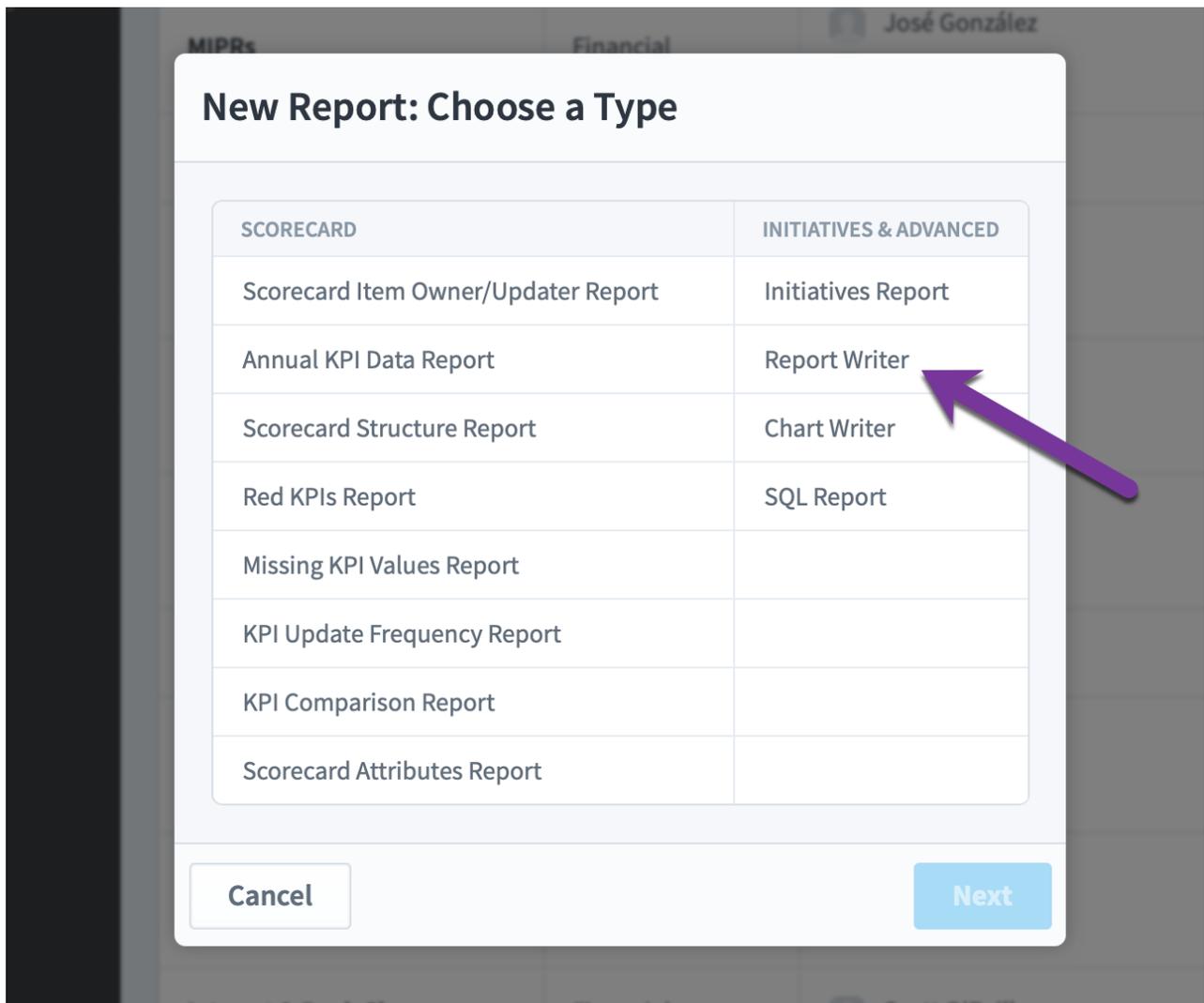
When we click Finish, we see a report that looks like this:

NAME	DATA TYPE	AGGREGATION TYPE	SCORING TYPE	KPI FREQUENCY	OWNERS	UPDATERS
Mobileworld Balanced Scorecard						
Financial						
Increase Revenue						
Base Funding	Standard	Sum	Goal/Red Flag	Monthly	Nora James Scott O'Reilly	Nora James Scott O'Reilly Viewer Only (Interactive Users)
MIPRs	Currency	Sum	Goal/Red Flag	Monthly	José González Scott O'Reilly	Scott O'Reilly Viewer Only (Interactive Users)
UFRs	Currency	Sum	Goal/Red Flag	Monthly	Scott O'Reilly	Scott O'Reilly Viewer Only (Interactive Users)
Total Revenue	Currency	Sum	Goal/Red Flag	Monthly	Dale Peterson Scott O'Reilly	Dale Peterson Scott O'Reilly

Report Writer

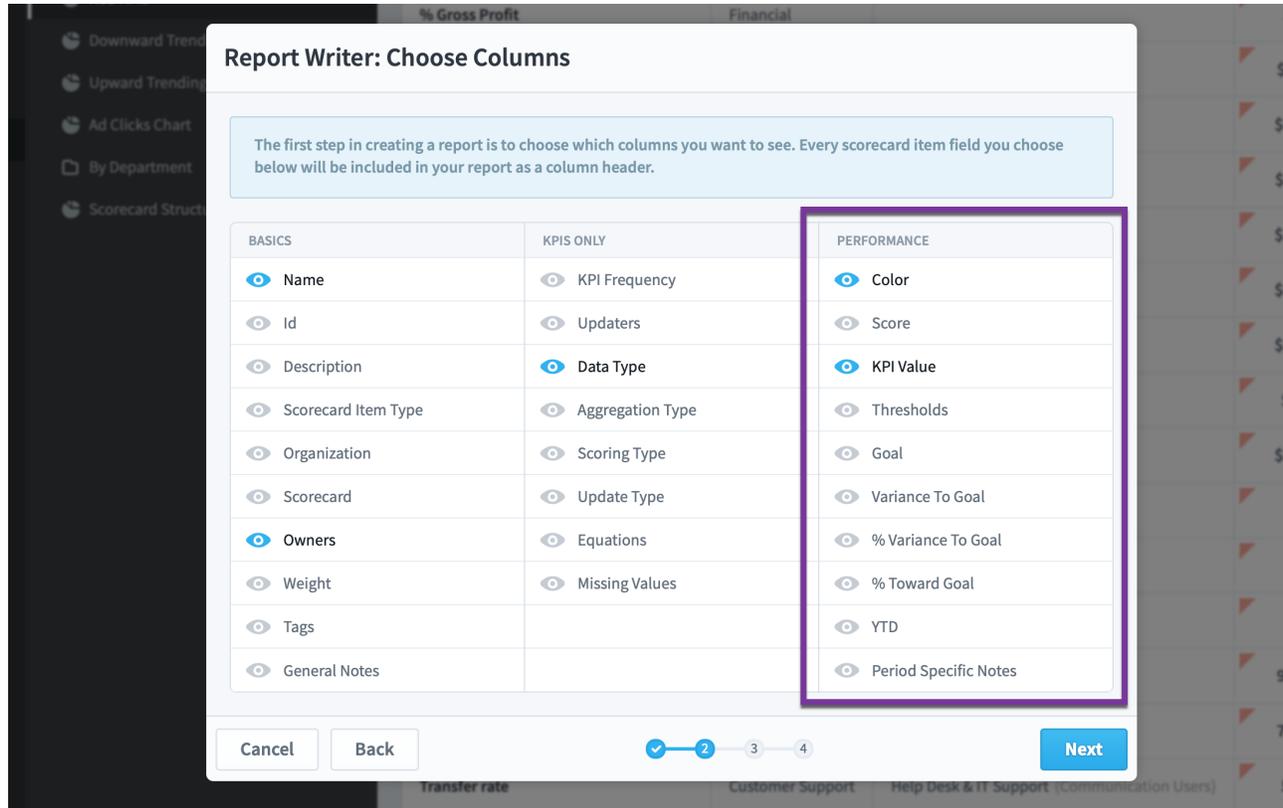
Overview

The report writer is an advanced report builder that allows you to choose which columns you want to see as well as what kind of scorecard items to show.

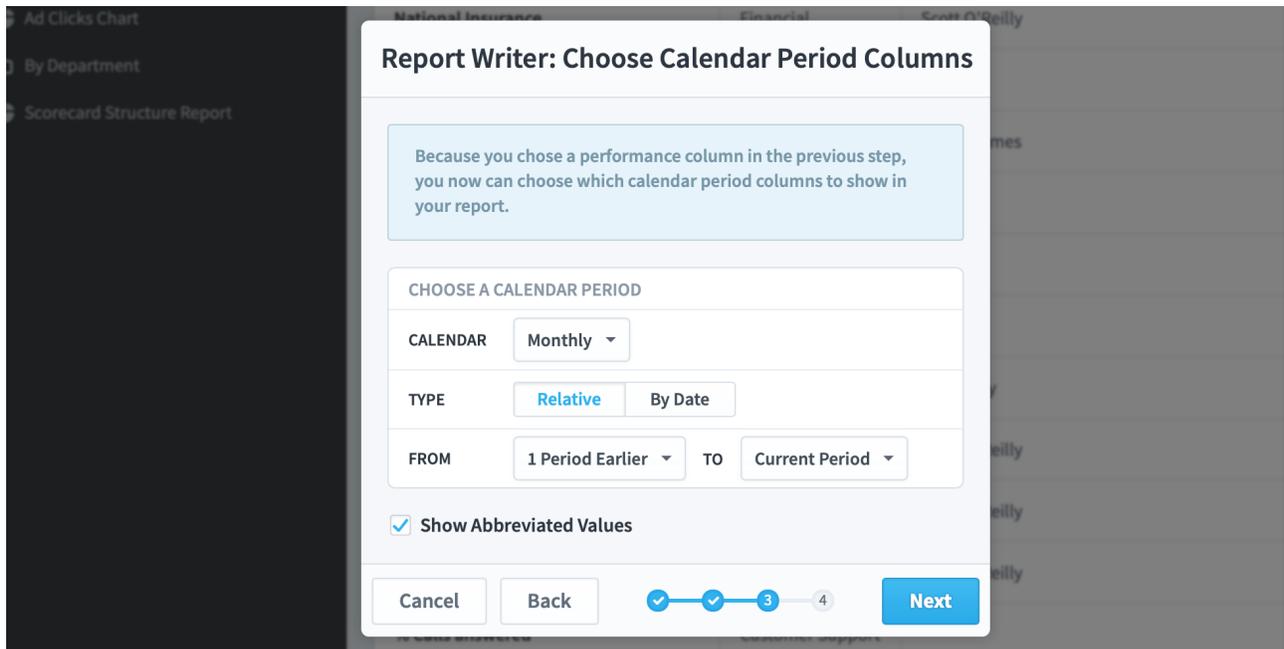


Choosing Columns

The first step in the report writer wizard is choosing what columns you want in your report.

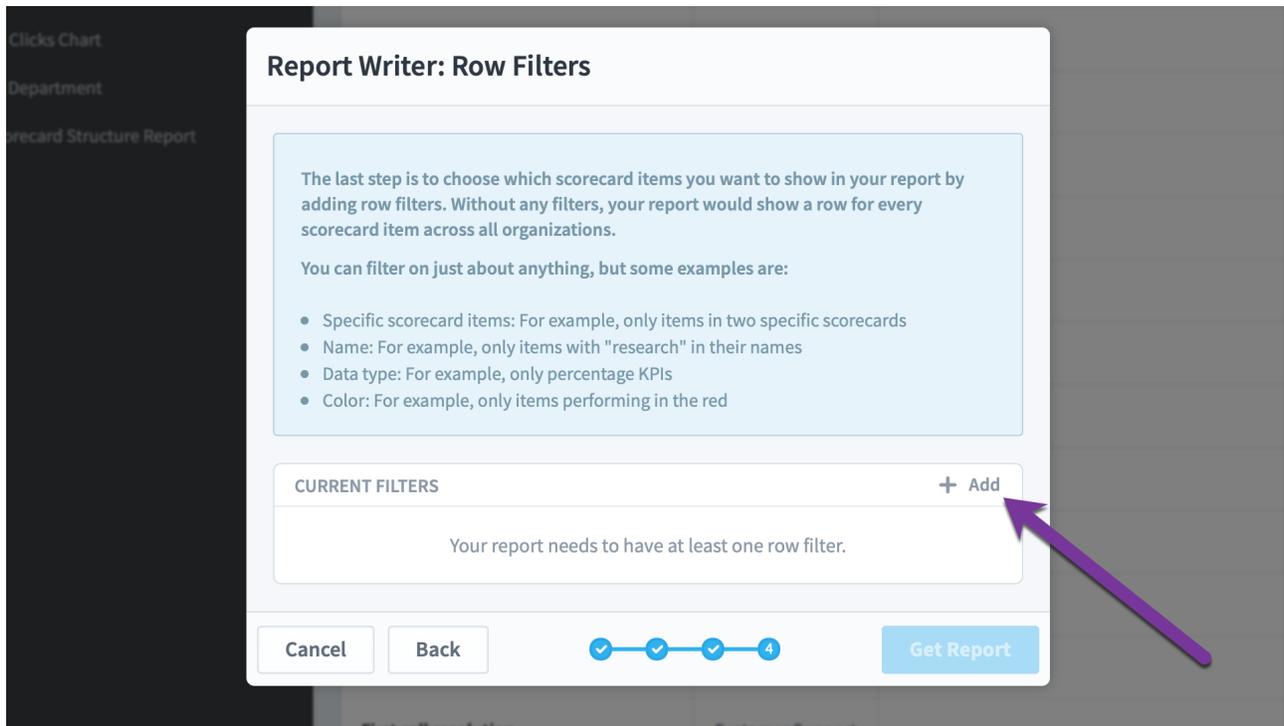


If you choose to show any of the performance columns, the next step in the wizard will ask you which dates you want to show for those performance columns. For example, if you choose to show KPIs' actual values, you'll need to choose the date range for the KPI values.

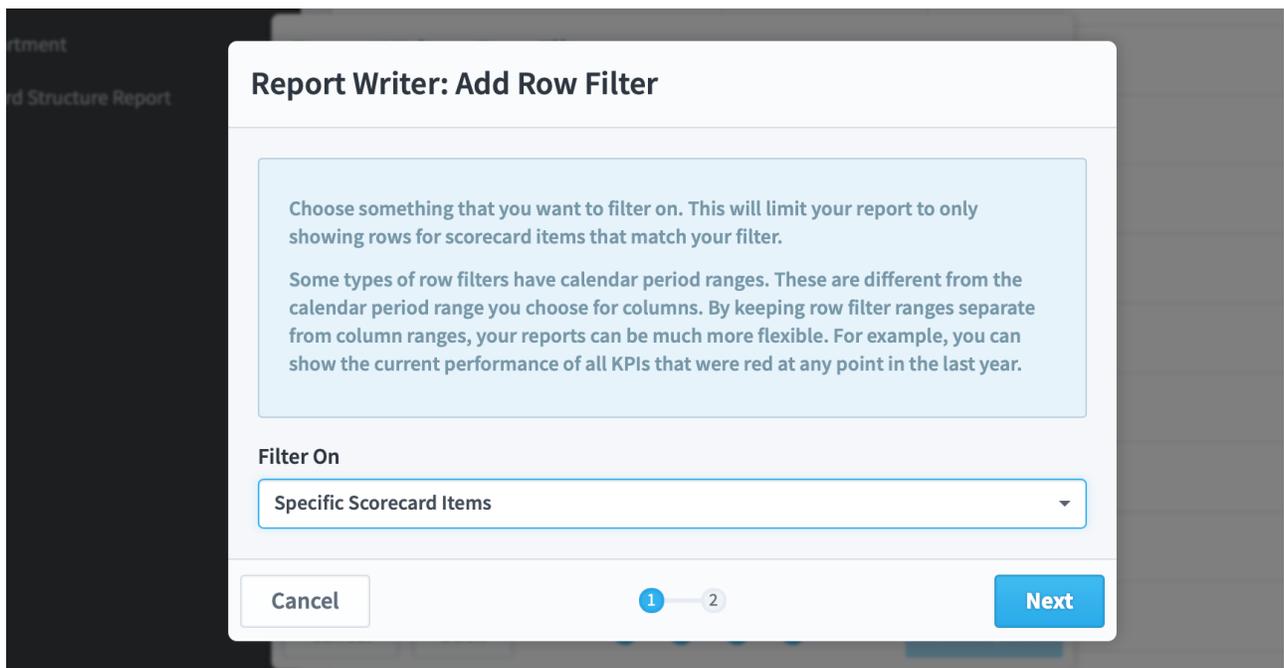


Row Filters

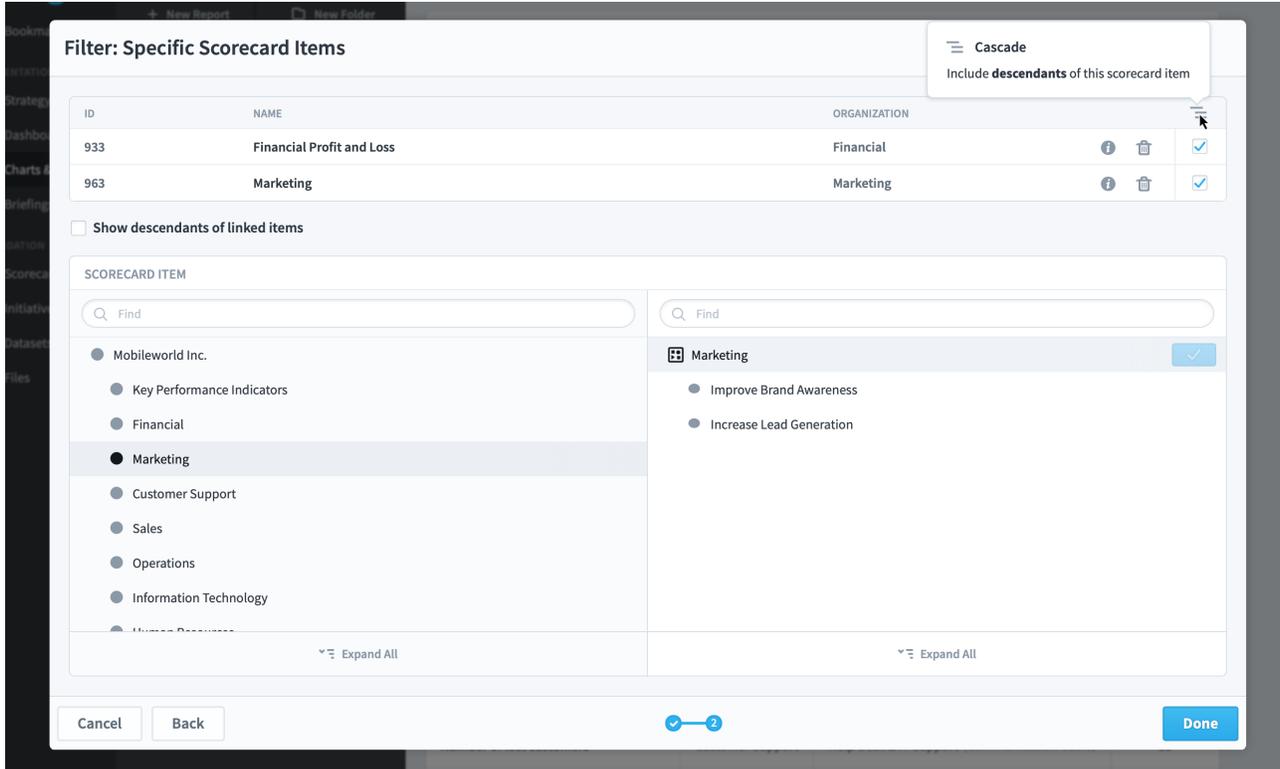
Next, you choose row filters. The idea here is that you're choosing which scorecard items you want to show. By default it's going to show every single scorecard item in the software, so we're going to want to add at least one row filter to choose which scorecard items to show.



When you click the "add" button it stacks a second-level dialog on top to choose which row filter you want. The default row filter is "Specific Scorecard Items".



This allows you to manually choose which scorecard items you want to see. In this example we're showing "Financial Profit and Loss" and all its descendants, as well as "Marketing" and its descendants.



Once you have your filter set up and you click Done, the second-level dialog closes and you can see your new filter.

Report Writer: Row Filters

The last step is to choose which scorecard items you want to show in your report by adding row filters. Without any filters, your report would show a row for every scorecard item across all organizations.

You can filter on just about anything, but some examples are:

- Specific scorecard items: For example, only items in two specific scorecards
- Name: For example, only items with "research" in their names
- Data type: For example, only percentage KPIs
- Color: For example, only items performing in the red

CURRENT FILTERS + Add

Specific Scorecard Items: is any of the following: Financial Profit and Loss and descendants, Marketing and descendants

Cancel Back ✓ ✓ ✓ 4 Get Report

Now we're going to add a second filter, this one for only showing the scorecard item type of KPI.

Report Writer: Add Row Filter

Choose something that you want to filter on. This will limit your report to only showing rows for scorecard items that match your filter.

Some types of row filters have calendar period ranges. These are different from the calendar period range you choose for columns. By keeping row filter ranges separate from column ranges, your reports can be much more flexible. For example, you can show the current performance of all KPIs that were red at any point in the last year.

Filter On

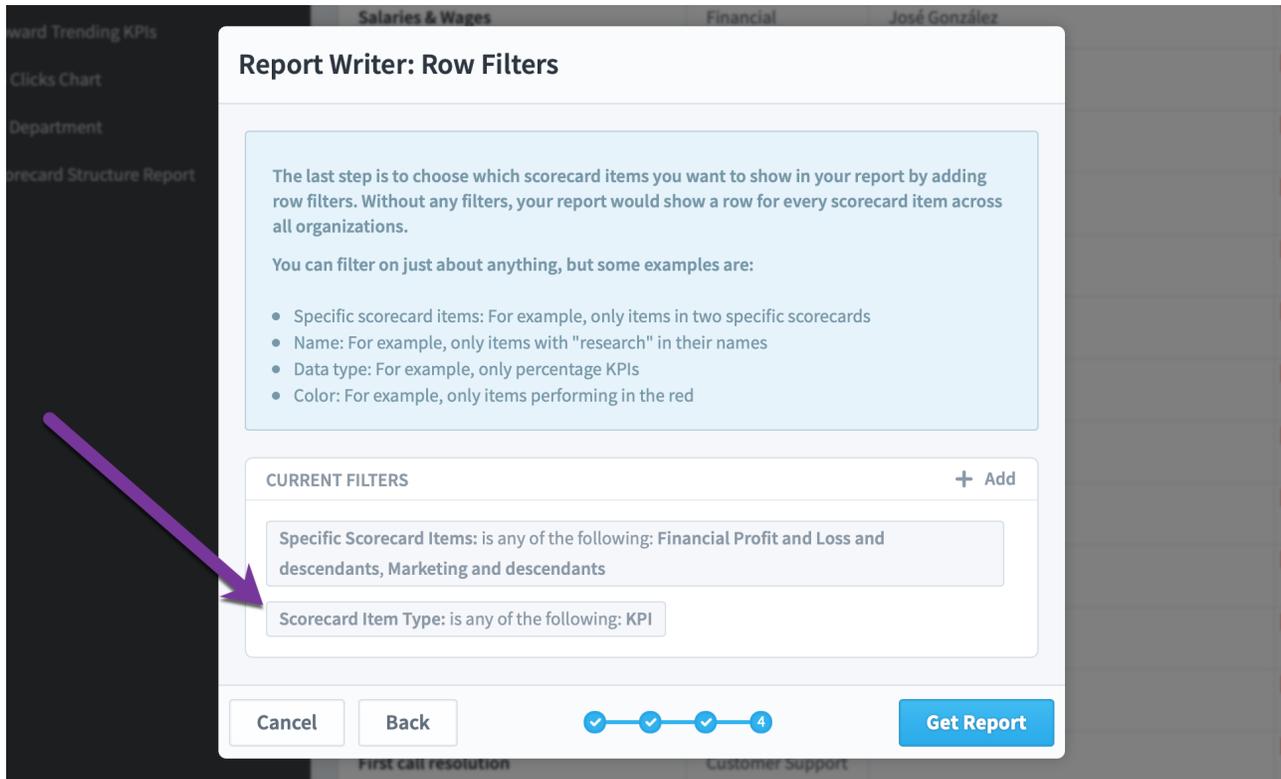
Scorecard Item Type

- ✓ Scorecard
- ✓ Generic Item
- ✓ Key Performance Area
- ✓ Objective
- ✓ KPI
- ✓ Linked Item

Add To Existing Filter As An OR

Cancel Done

As you can see here, the report will now show all financial and marketing KPIs.



Viewing and Saving

When you click "Get Report" you're taken to the View tab where you can see the results of your report. Notice, however, that your report hasn't been saved yet. You may want to save it for later, but you may also just want to see its data and move on.

Report Writer

View | Edit | February 2020

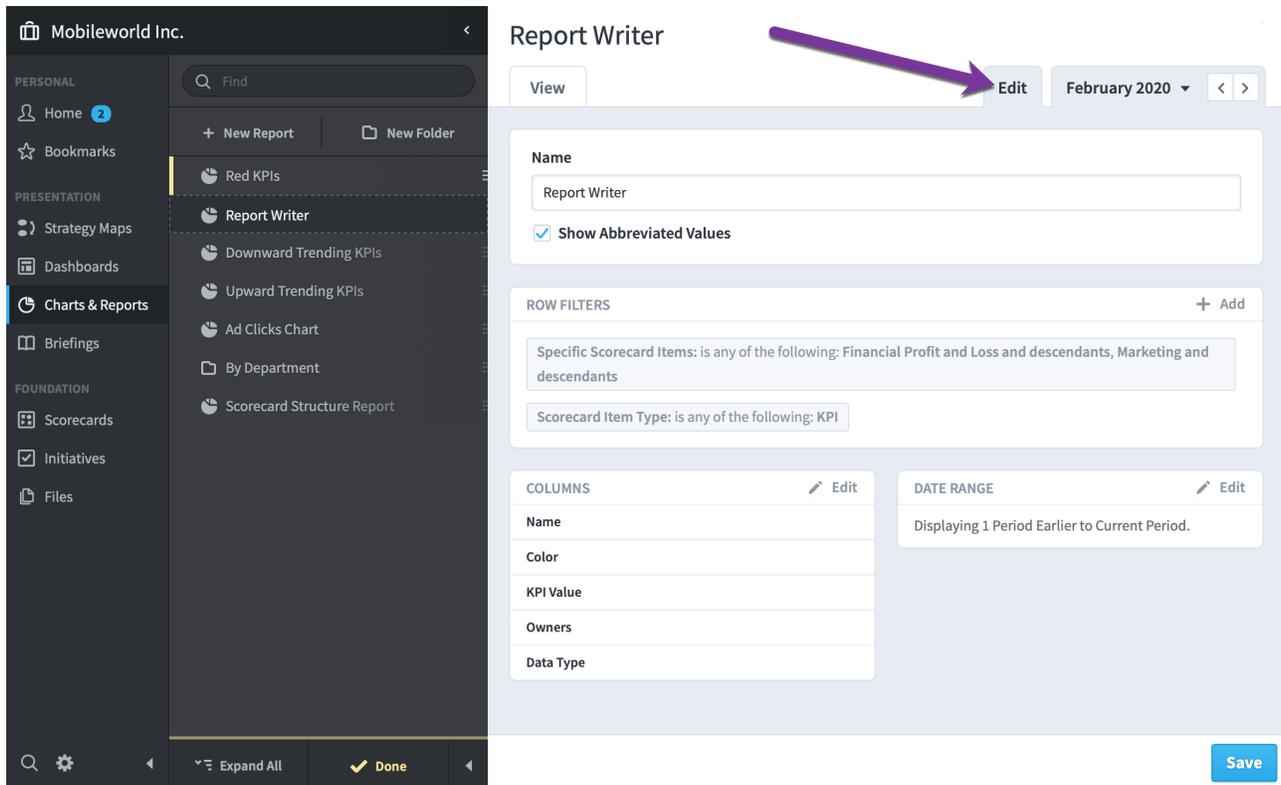
NAME	DATA TYPE	OWNERS	JANUARY 2020	FEBRUARY 2020
Product Revenue	Currency	Nora Roberts Scott O'Reilly	\$400	\$453K
Training Revenue	Currency		\$280K	\$277K
Book Revenue	Currency	Scott O'Reilly	\$38.5K	\$35.7K
Product Costs	Currency	Norah James	\$275K	\$275K
Training Venue Costs	Currency		\$38.6K	\$38.6K
Book Production Costs	Currency		\$8,563	\$8,279
Total Costs	Currency		\$319K	\$321K
Total Gross Profit	Currency	View Only	\$443K	\$449K
% Gross Profit	Percentage		55.9%	56%
Salaries & Wages	Currency	José González	\$180K	\$176K
National Insurance	Currency	Scott O'Reilly	\$55.7K	\$58.9K

Mass Edit | Save

Note: A purple arrow points from the 'Mass Edit' button to the '% Gross Profit' row.

Editing

You can change what columns and rows your chart is showing by visiting the Edit tab.



"OR" Row Filters

Row filters usually combine together with ANDs. For example, you want to see the scorecard items that match the first filter AND the second filter. You can also choose to combine filters with ORs.

Let's start with a simple report that shows all of the KPIs that are red for a month.

NAME	ORGANIZATION	OWNERS	APRIL 2018
Product Costs	Financial	Joe Abercrombie	 \$278,157
Total Costs	Financial		 \$327,258
Pension Contribution (3%)	Financial		 \$4,969
Marketing & Advertising	Financial	David Baldacci	 \$99,134
Interest & Bank Charges	Financial		 \$20,962
Insurance	Financial	Joe Abercrombie	 \$16,056
Office Rental	Financial	Brandon Sanderson	 \$32,354

Here's what the two filters look like. The item type is KPI and the color is red.

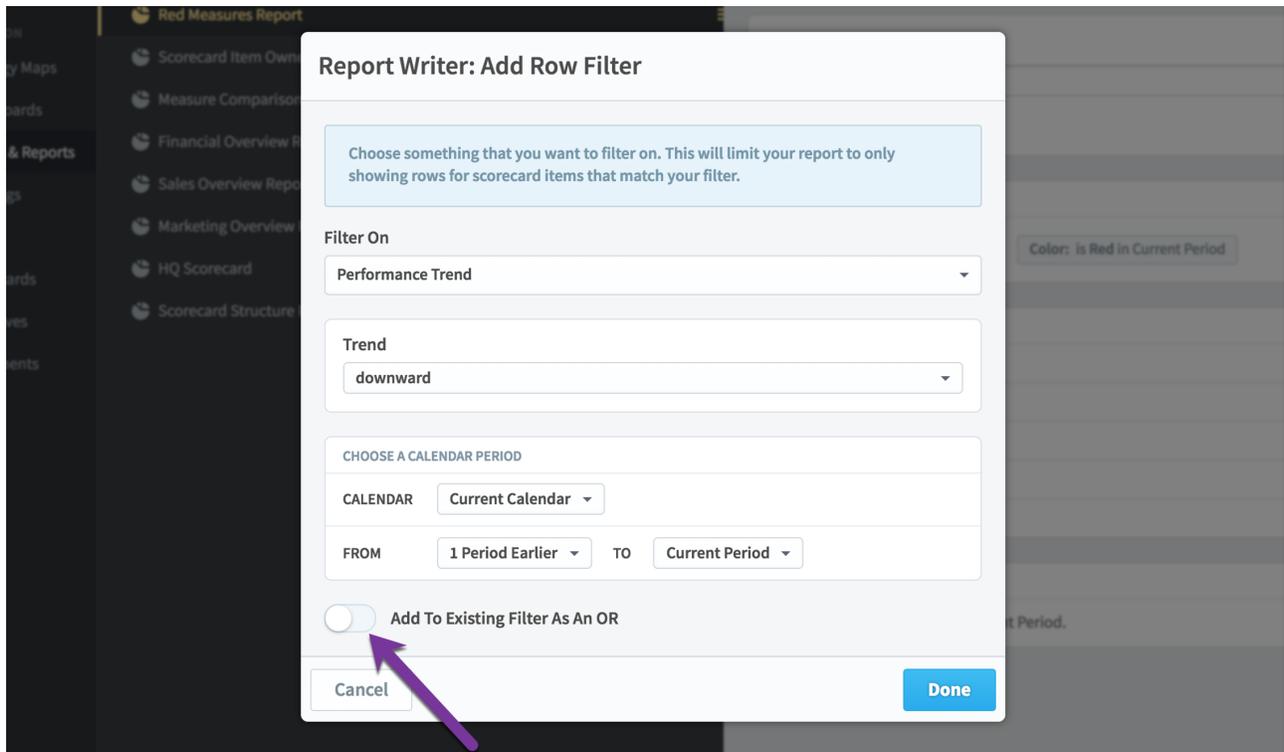
ROW FILTERS + Add

Scorecard Item Type: is: KPI

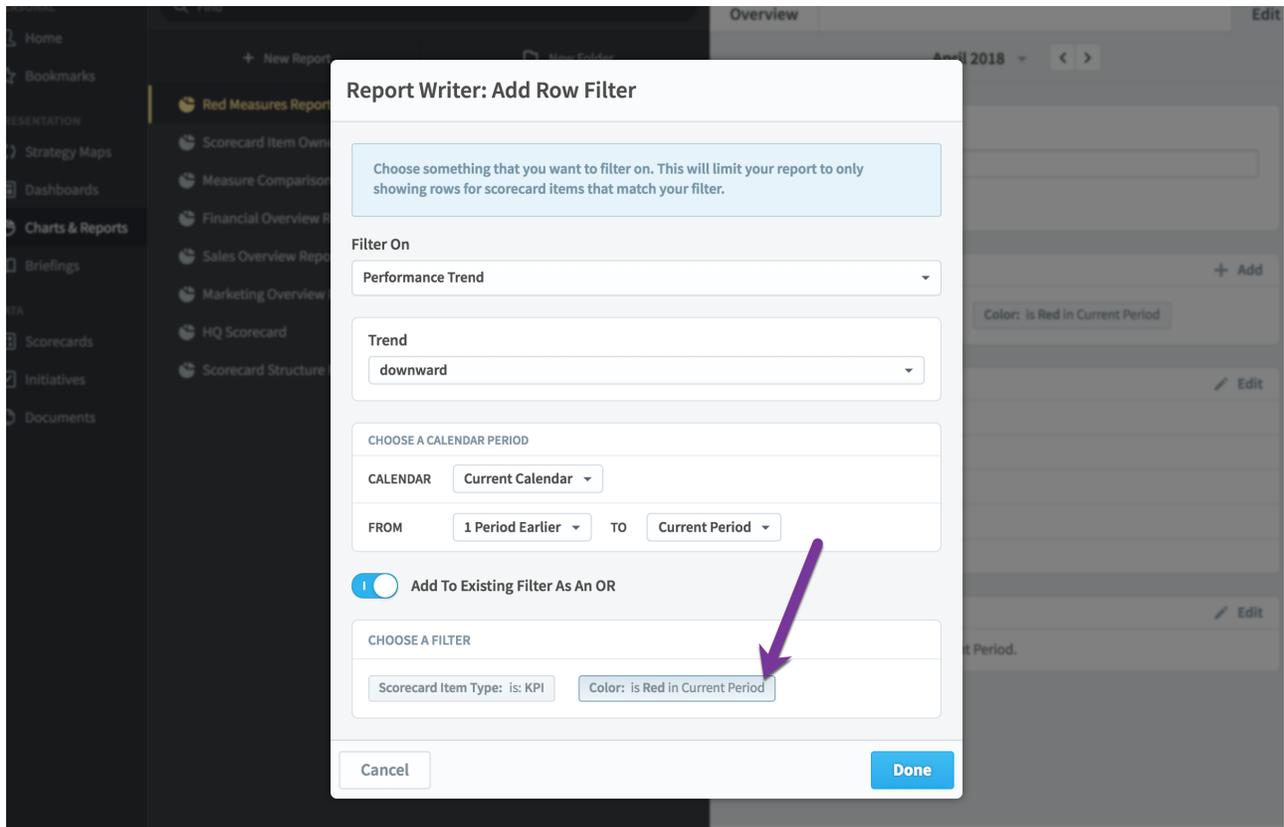
Color: is Red in Current Period

Let's say we want to change this report to show not only red KPIs, but also KPIs that are trending downward. That way we'll have a single report showing all of the KPIs we need to keep an eye on.

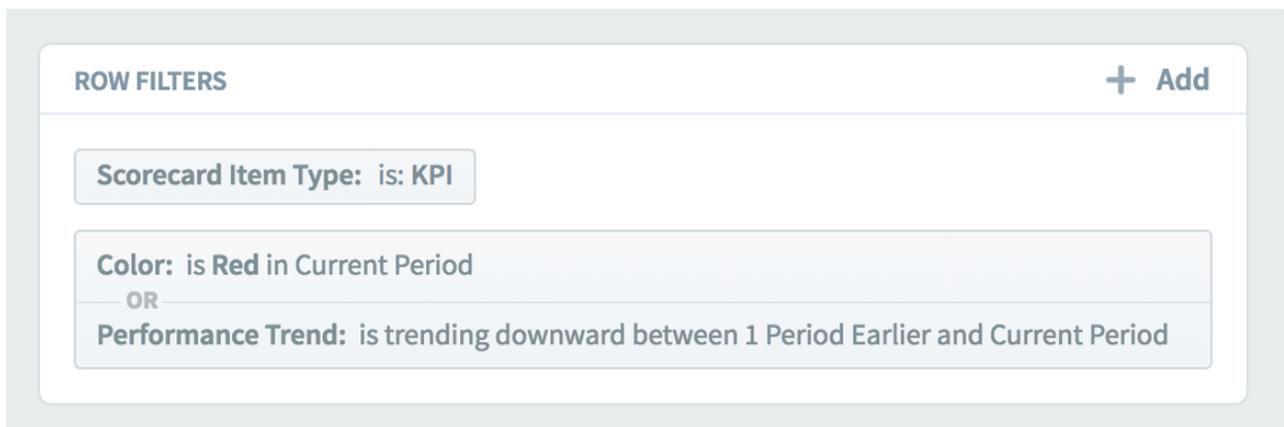
In order to do this, we'll add a new "downward trend" filter, and before we click "done," we'll turn on this OR filter switch on the bottom.



Now we need to choose which existing filter we're going to add our new filter to. Since we want to show all "red" or all "downward trending," we'll choose the red color filter to use with our OR.



This is what the filters look like now. This means that the report will show all items that are KPIs and (red or downward trending).

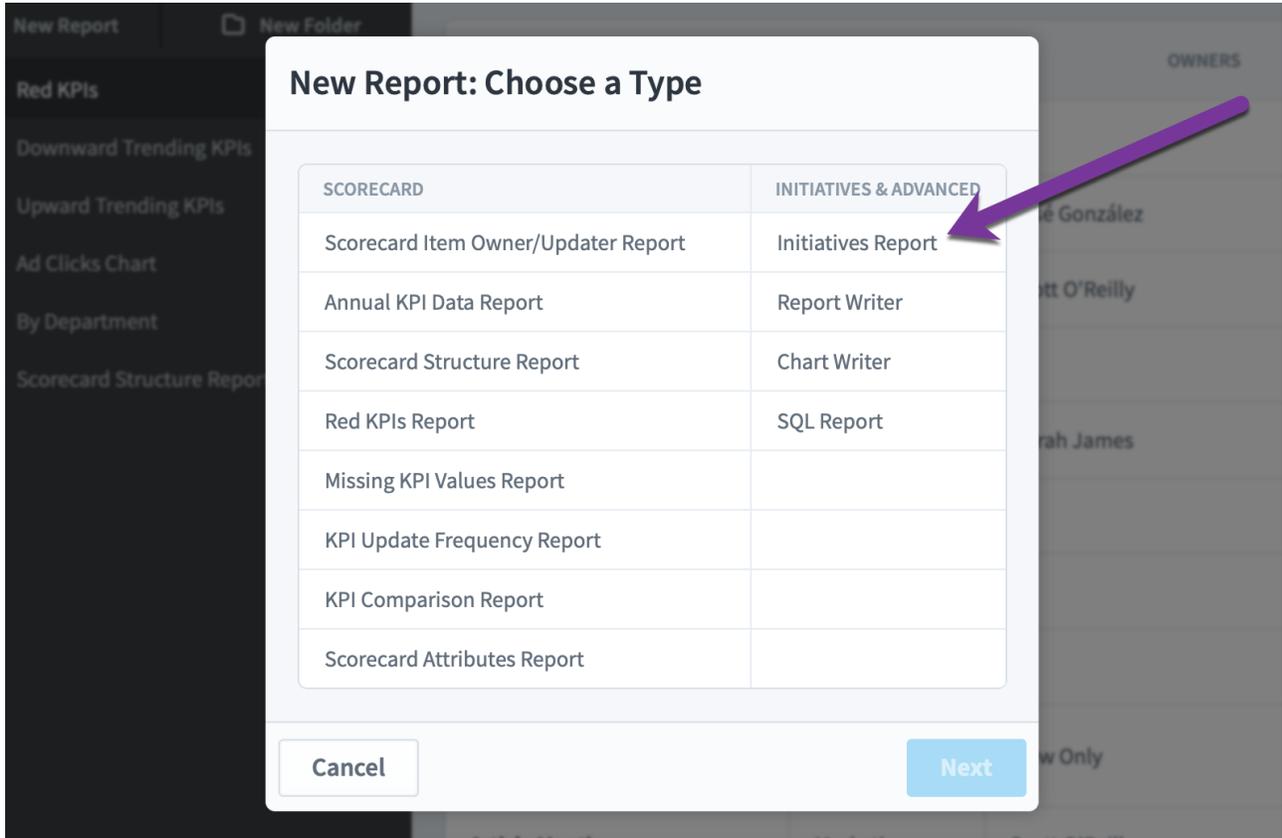


And here's our new report.

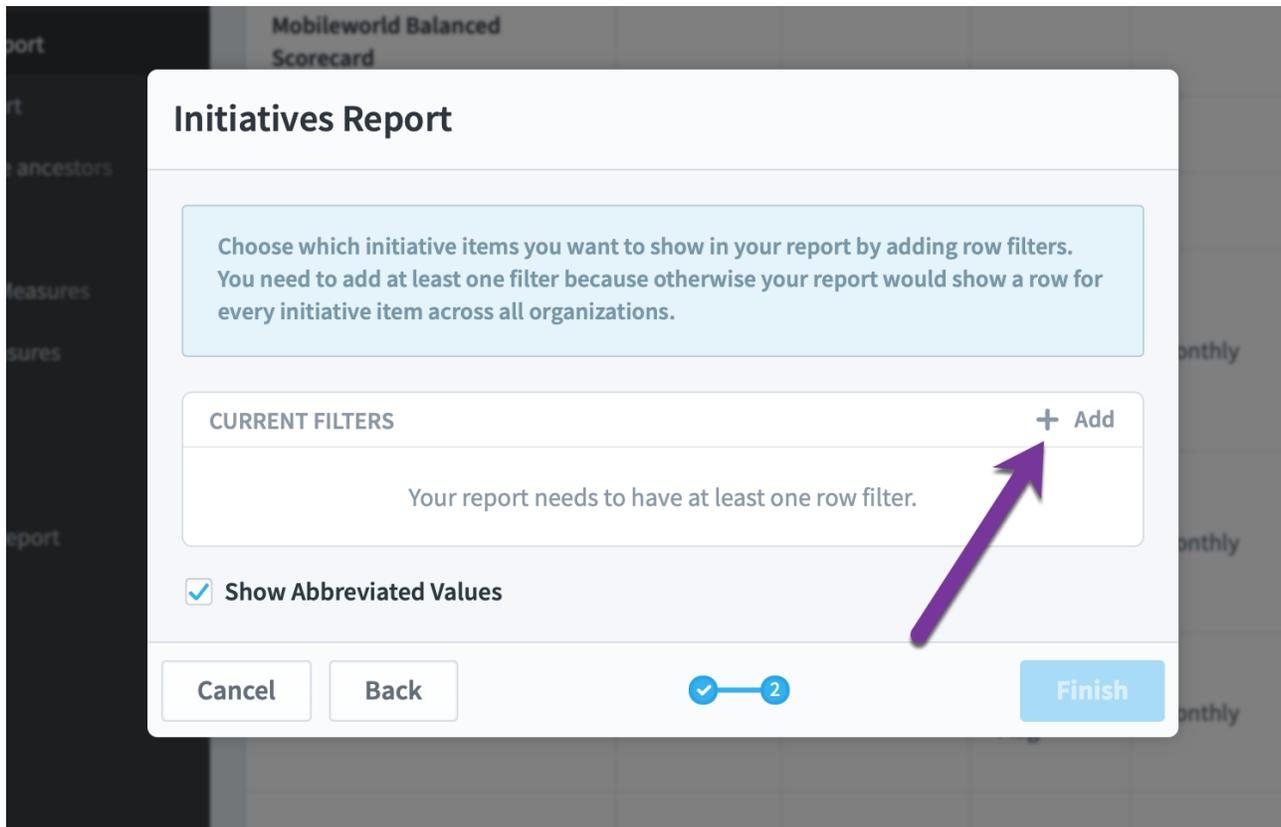
NAME	ORGANIZATION	OWNERS	APRIL 2018
Number of Customers	Mobileworld Inc.		 594
Product Costs	Financial	Joe Abercrombie	 \$278,157
Book Production	Financial		 \$8,121
Total Costs	Financial		 \$327,258
% Gross Profit	Financial		 57%
Pension Contribution (3%)	Financial		 \$4,969
Marketing & Advertising	Financial	David Baldacci	 \$99,134

Initiatives Report

Most reports show information about scorecard items, but the initiatives report shows you information about initiative performance.



The first step is to add a row filter, so we'll click the Add button.



This stacks a second-level dialog on top. In this example we'll choose the "Specific Initiative Items" filter, but we could also show things like overdue initiatives.

Initiatives Report: Add Row Filter

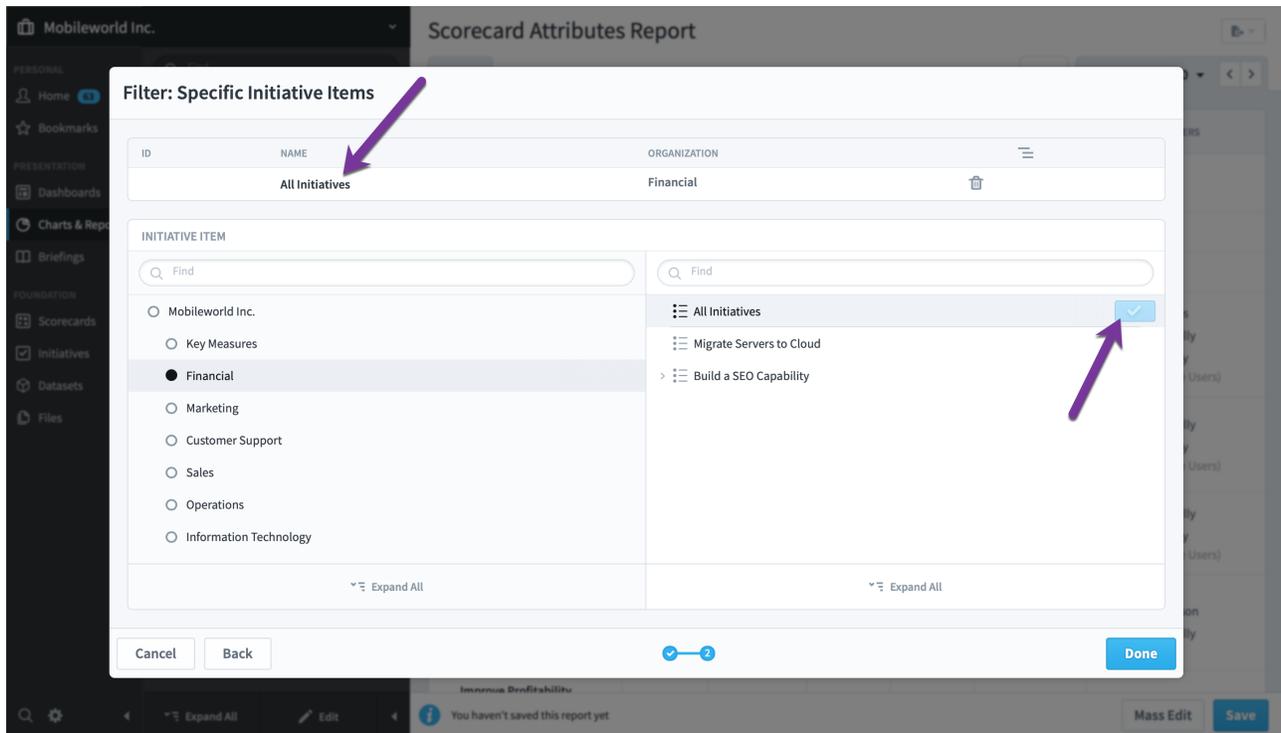
Choose something that you want to filter on. This will limit your report to only showing rows for initiative items that match your filter.

Filter On

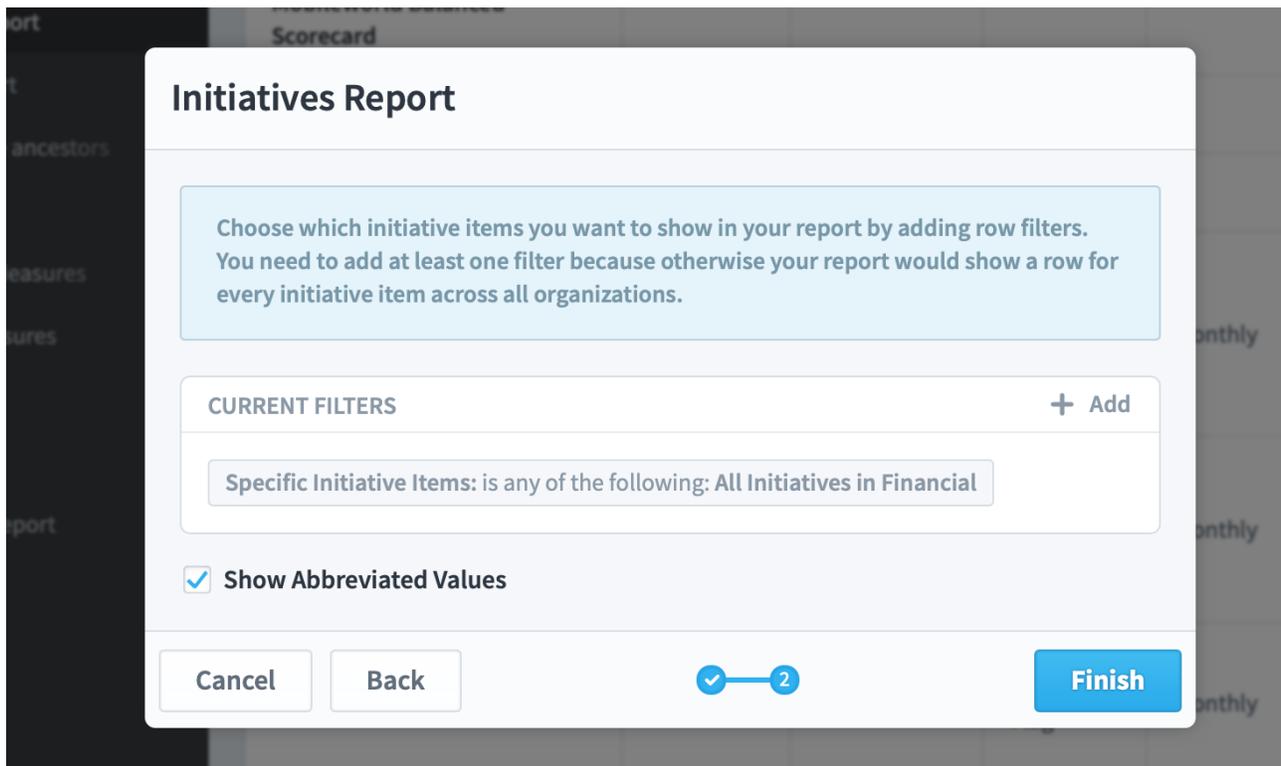
Start Typing...

- Archive Status
- Assignee
- Completion Date
- Completion Status
- Due Date
- Specific Initiative Items**
- Tags

We'll then choose which initiatives we want to see.



When we click Done the second-level dialog closes and our report is ready to be run.



After we click Finish we can see a report that look like this:

Mobilewo

PERSONAL

Home 63

Bookmarks

PRESENTATION

Dashboards

Charts & Reports

Briefings

FOUNDATION

Scorecards

Initiatives

Datasets

Files

Initiatives Report

Print
Edit

View

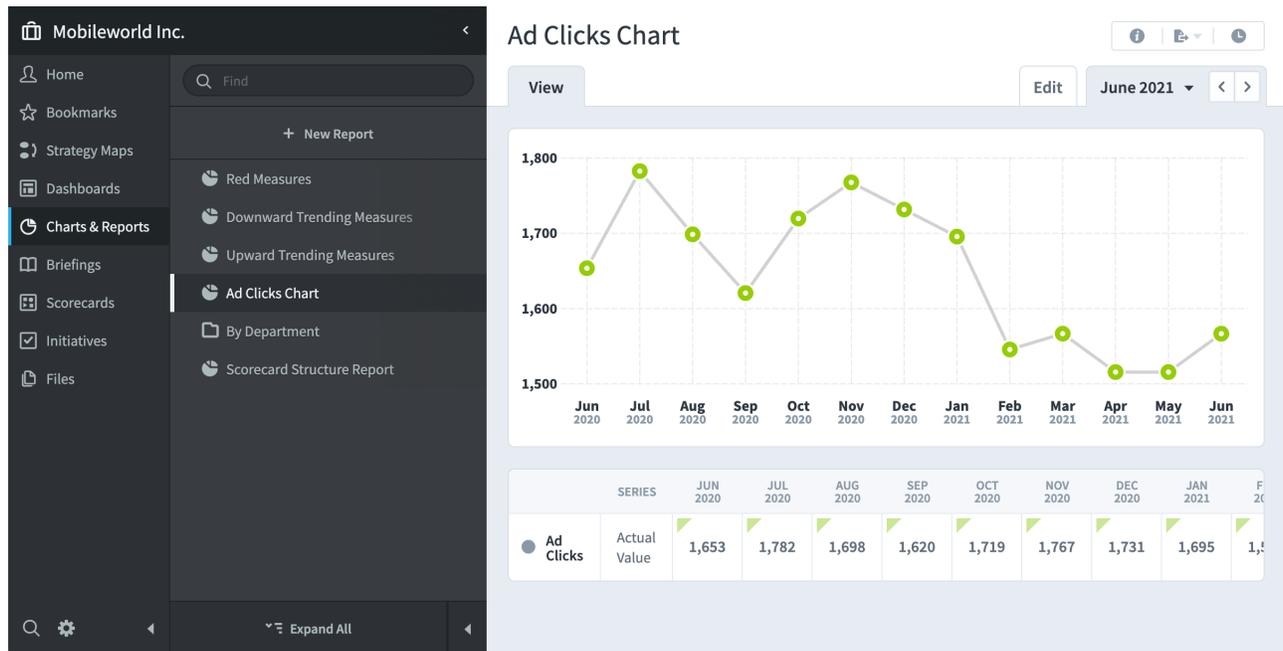
NAME	ID	TYPE	DESCRIPTION	RELATED ITEMS	ORGANIZATION	TAGS	ASSIGNED USERS AND GROUPS	MONEY SPENT TO DATE	TOTAL BUDGET	START DATE	DUE DATE	COMPLETION DATE	PERCENT COMPLETE	IS ARCHIVED?
Research project and write a report	18	Task			Financial			\$11.5K	\$15K	2019-01-01	2019-04-07	2019-04-07	100%	No
Status Update to Board	20	Milestone			Financial			\$0			2019-08-29	2019-08-20	100%	No
Develop a web marketing team	19	Task			Financial	it	Sam Smith View Only	\$220K	\$350K	2019-02-28	2020-04-30	2019-10-18	100%	No
Migrate Servers to Cloud	8017	Initiative	Risk: Customer data leakage, corruption, or unavailability. Scope: This covers internal email and application hosting servers.	Improve IT Effectiveness Increase Revenue	Financial	cloud,it	Sam Smith Scott O'Reilly View Only	\$140K	\$150K	2018-07-01	2019-12-01		95%	No
Build a SEO Capability	17	Initiative	Over the next 18 months build our Search Engine Optimization (SEO) capability utilizing a mix of internal and external resources.	Improve IT Effectiveness Improve Market Awareness Improve	Financial	it	Scott O'Reilly View Only	\$232K	\$365K	2019-01-01	2020-04-30	2019-10-18	100%	No

i You haven't saved this report yet
Save

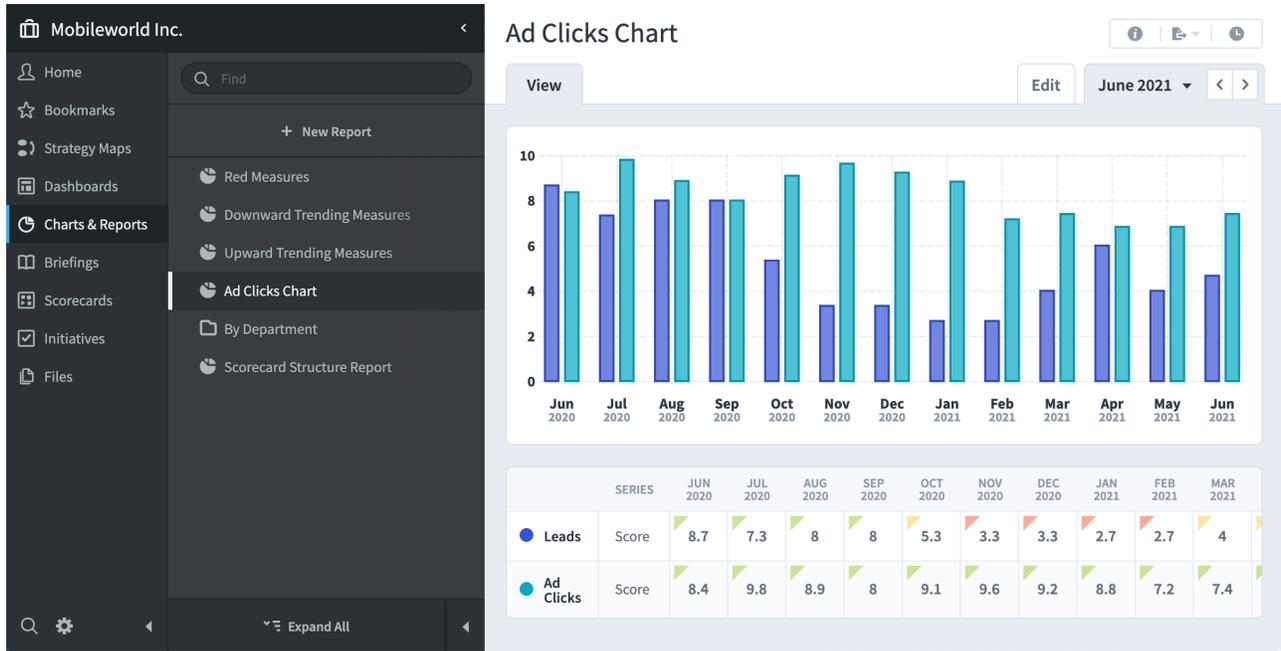
Chart Writer

Overview

Chart Writer is part of the Reports section and allows you to create charts from your Scorecard and Initiative data that look like this:

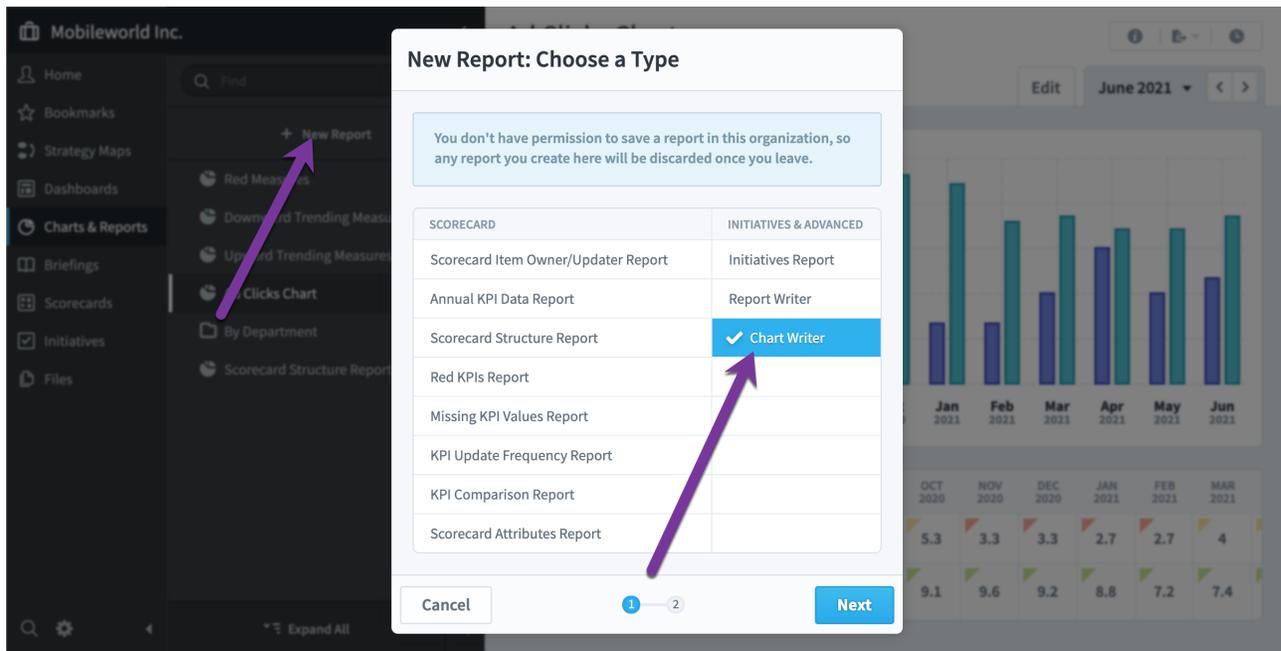


Or this:



Creating a Chart

Creating a chart is the same as creating any other report in the Reports section. Just click the *New Report* button and choose *Chart Writer*.



From here, you'll want to configure your chart to show the data you want. This is the same process as configuring charts in the Dashboards section, and both are covered in the [Customizing Charts](#) article.

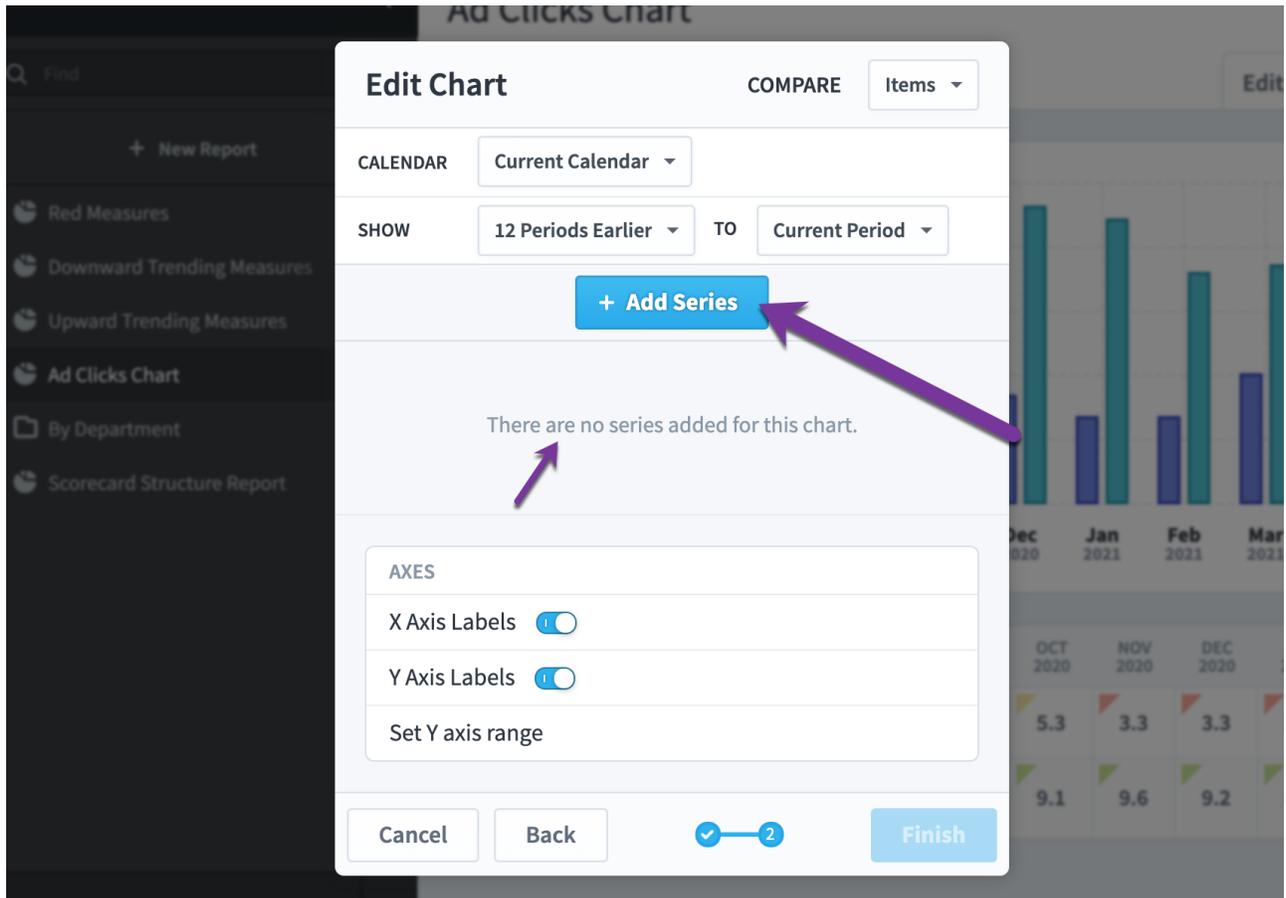
Customizing Charts

Overview

You can [add charts to dashboards](#), or charts can exist on their own [in the Reports section](#). Although they're created in different ways, the ways you configure dashboard charts and report charts are the same.

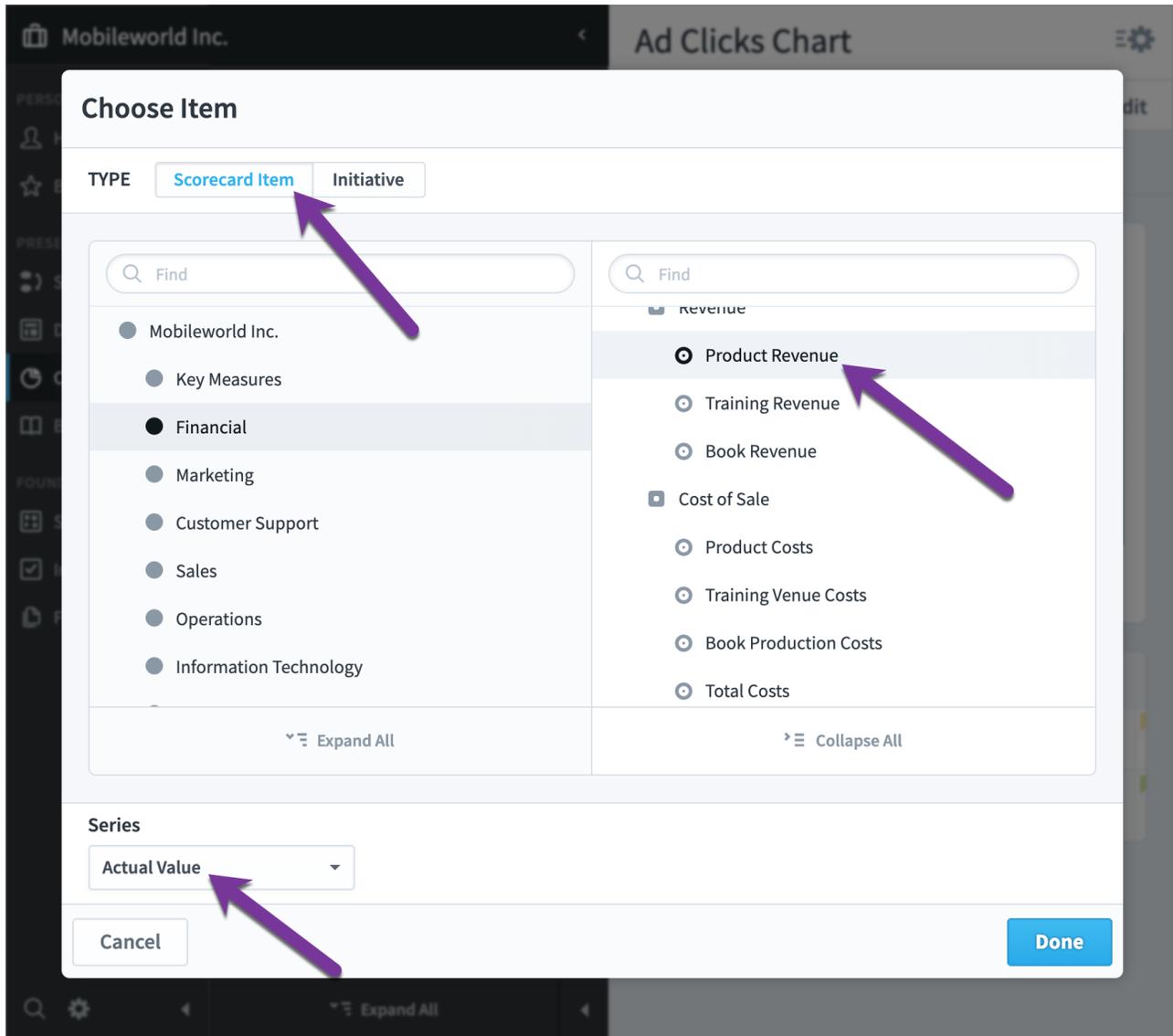
Chart Series

A series is the data you want to graph, for example a KPI's actual value, or an Initiative's money spent. In this example we're starting completely blank with no series, so we need to add one. Let's click the "Add Series" button.



A second-level dialog stacks on top, and now we browse for the data we want to use on our chart. In this example I've selected a "Product Revenue" scorecard item,

and in the Series dropdown at the bottom I can choose between graphing its "Actual Value" or "Score".



When I click Done and the second-level dialog closes, our chart now has a series. One series is all we need, but you can continue adding more if you want to compare data from multiple things on the same chart.

Edit Chart COMPARE Items

CALENDAR Current Calendar

SHOW 12 Periods Earlier TO Current Period

+ Add Series

PRODUCT REVENUE

Product Revenue (Actual Value) [Change](#)
Financial

NAME Scorecard Item Name COLOR

GRAPH Line TRENDLINE AXIS ON RIGHT

BACKGROUND THRESHOLDS

None

Product Revenue

AXES

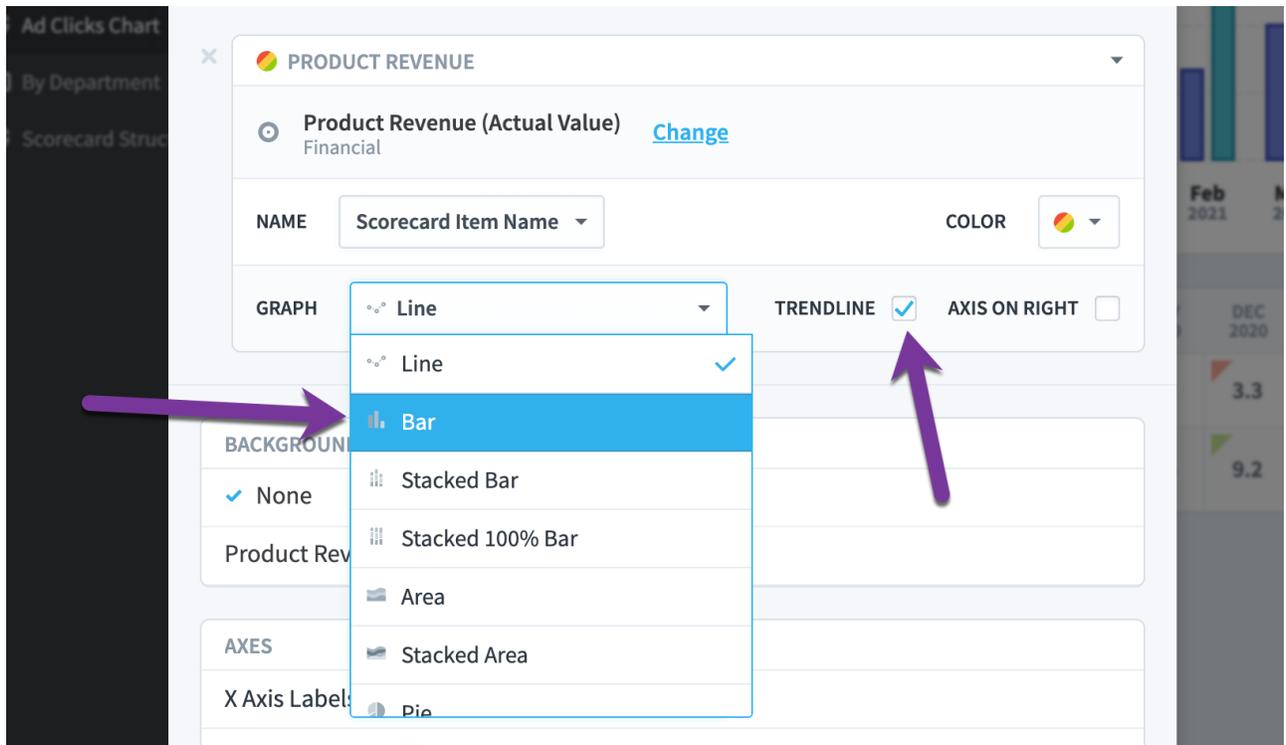
X Axis Labels

Y Axis Labels

Set Y axis range

Cancel Back Finish

From here there are all kinds of things to show and configure. For example, I'm going to change my series to be a bar chart, and I'm going to show a trendline.



When I click Finish, we get to see our chart.



Series Labels

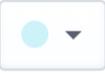
In this example we're showing three types of revenue for a particular month.



You can choose which label to use for each bar, with options like the item name, the organization name, the series name, or a custom value that you type yourself. Each is useful in different situations, depending on what you're comparing.

BOOK REVENUE

Book Revenue (Actual Value) [Change](#)
Mobileworld Inc.

NAME Scorecard Item Name COLOR 

GRAPH Scorecard Item Name ✓ Organization Name Series Name Custom TRENDLINE AXIS ON RIGHT

TRAINING

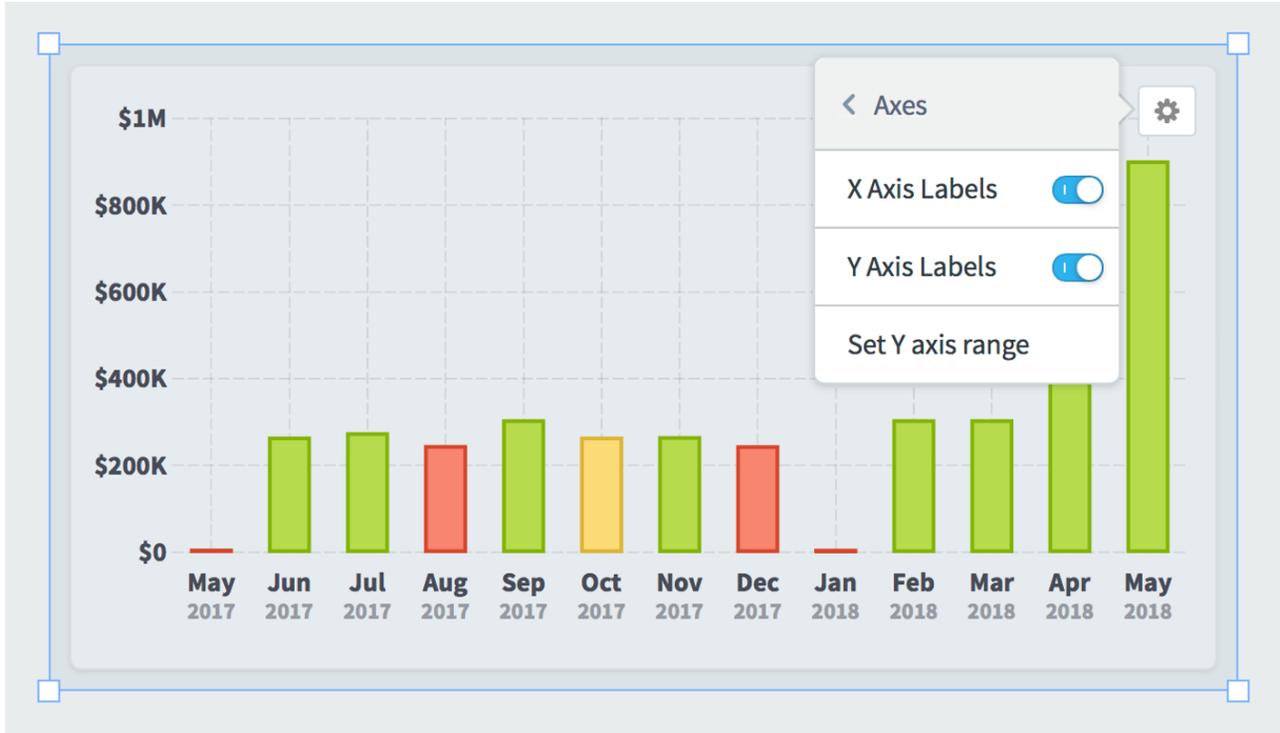
PRODUCT REVENUE

In this example we've given each bar a custom label that is a shortened version of its item name.

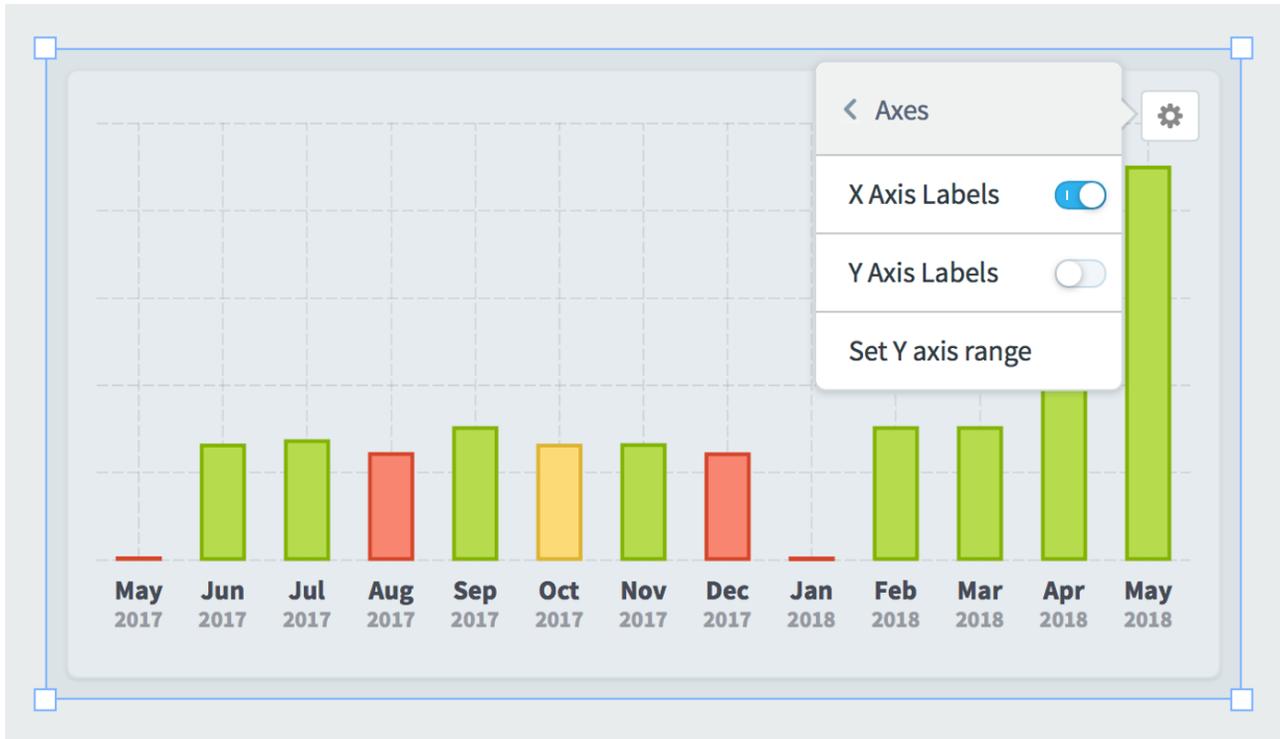


Axis Labels

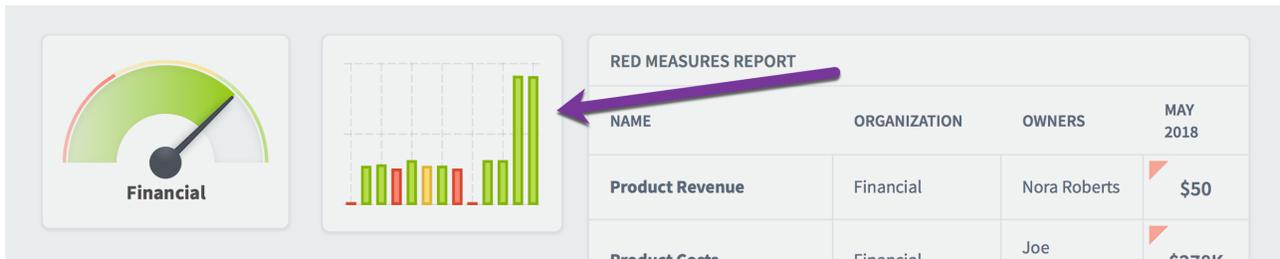
You can turn off X and/or Y axis labels on dashboard charts. This example shows the default appearance with both axes turned on.



Here we've turned off the Y axis.



Being able to turn off axes is particularly useful when creating small charts that show a general overview of performance rather than specific numbers.

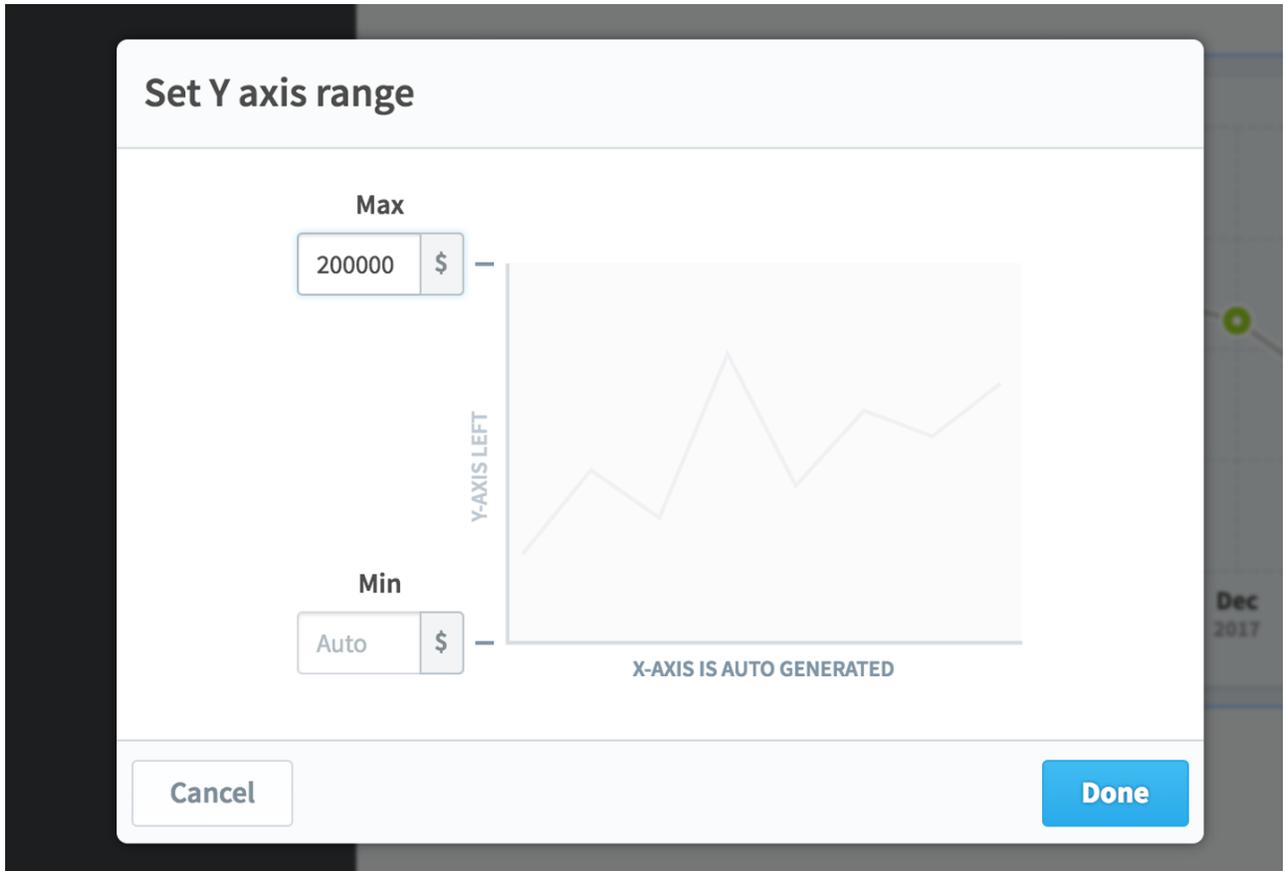


Y Axis Range

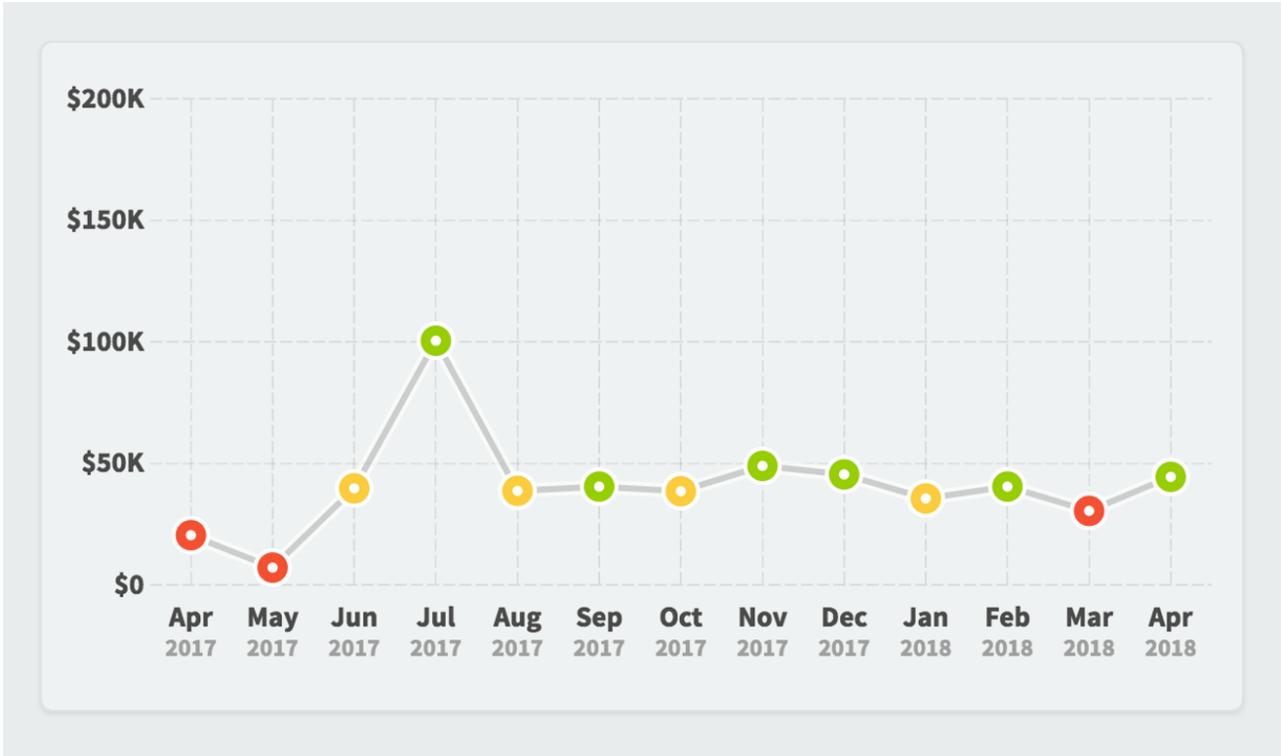
By default, charts automatically determine their Y axis scale based on the data that they're showing. In this example the chart range is \$0 to \$100k.



You can manually override the minimum and maximum values by choosing “set Y axis range” in the widget configuration menu. In this example we’re forcing the maximum value to be \$200k.



That creates a chart that looks like this.



SQL Reports

SQL Reports allow you to write raw SQL against a database that you have set up in Admin > Import Connections.

You can include the following text in your SQL queries.

- [calendar-period-id]
- [calendar-period-start]
- [calendar-period-end]

In this example we're referencing both the calendar period start date and end date to see all of the failed logins during the current period.

Name

Query

```
select DATE_FORMAT(LOGINHISTORYDATE, '%Y-%m-%d %T') as TIME, LOGINHISTORYIP,
USERALIAS
from loginhistory
where LOGINHISTORYRESULT = 'failure'
and LOGINHISTORYDATE > [calendar-period-start]
and LOGINHISTORYDATE < [calendar-period-end]
```

Here are the report results for August 2019. You can see there were three failed logins.

View Edit August 2019 < >

QUERY RESULTS (3 results returned in 0 ms)

TIME	LOGINHISTORYIP	USERALIAS
2019-08-04 15:24:22	104.248.165.92	
2019-08-07 09:26:57	165.225.38.234	view123
2019-08-23 20:15:26	197.210.58.47	

When you change the calendar period selector to September 2019, the SQL report shows different results.

View Edit September 2019 < >

QUERY RESULTS (2 results returned in 0 ms)

TIME	LOGINHISTORYIP	USERALIAS
2019-09-16 09:55:42	94.188.173.186	nir.ezry@security.com
2019-09-20 09:34:21	109.71.122.75	

Other Sections

Overview of Initiatives

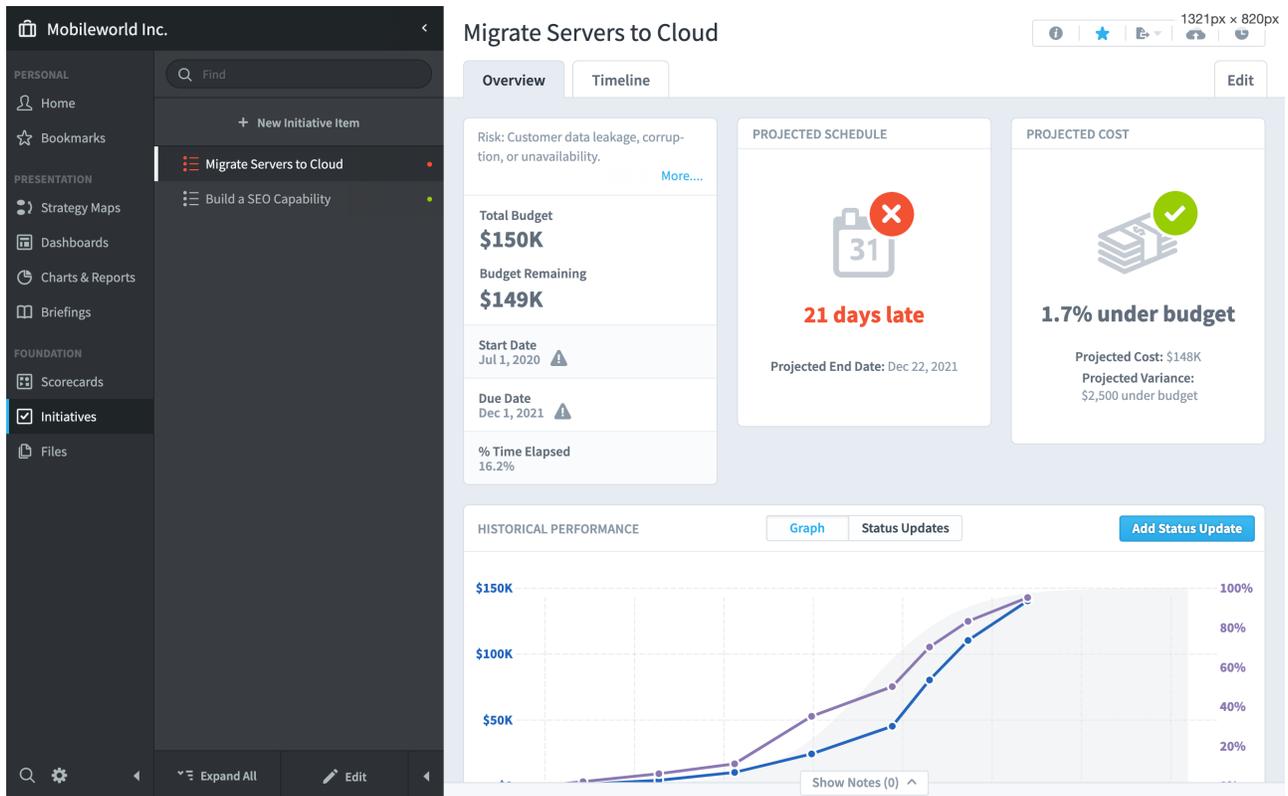
The Basics

In the Scorecards section we track KPIs and strategy. You define what you want to measure, and then you measure the same things month after month, year after year.

Initiatives are different. They have a specific start and end date, and they often are put into place to correct the performance of a scorecard item. For example, in the balanced scorecard methodology, Initiatives are put in place to fix poorly performing Objectives.

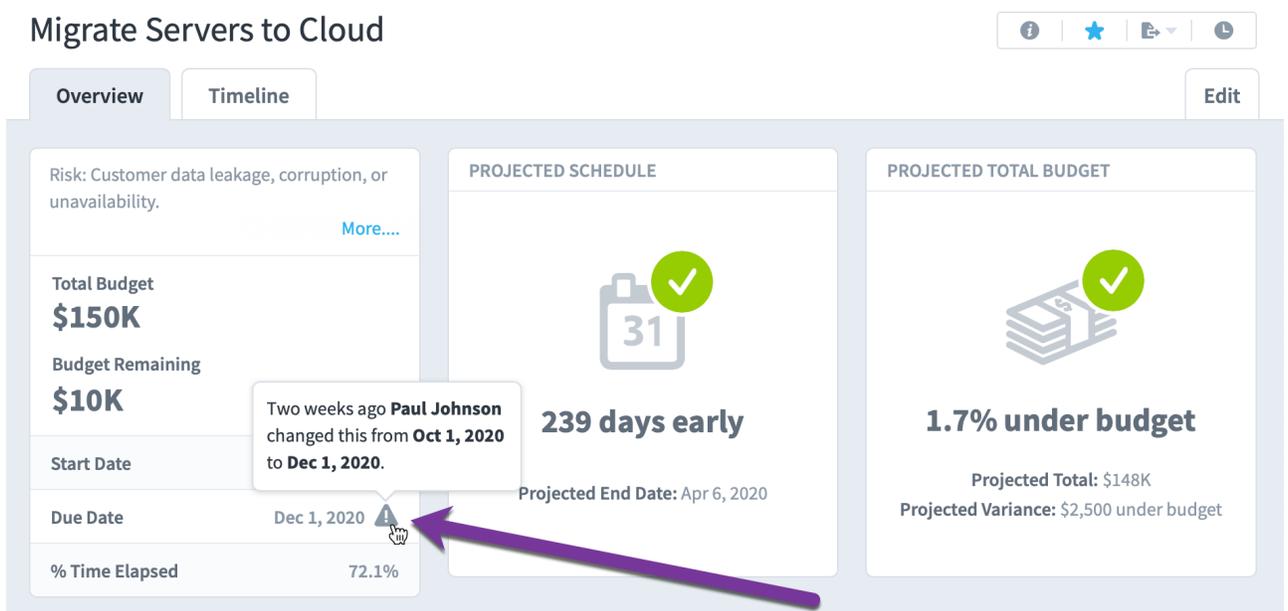
Overview Tab

The Initiatives Overview tab gives you a good feel for the overall performance of your initiative. Spider Impact will predict whether your initiative will be on time and under budget.



Changes to Key Numbers

In an effort to promote transparency, whenever an initiative's start or end date is edited, that information is displayed next to the new value on the overview tab.



Projected End Dates in the Past

Spider Impact automatically predicts when an initiative will be finished and what its budget will be at completion. These predictions start to fall apart, however, when initiatives don't get regular status updates.

It can get particularly confusing when a projected end date is in the past. This can happen when the last status update is so long ago that the initiative has probably ended by now. To avoid this confusion, there's an indicator next to projected end dates that are in the past, and when you click on it, there's a tooltip explaining what is happening.

Build a SEO Capability

Overview | Timeline | Edit

Over the next 18 months build our Search Engine Optimization (SEO) capability utilizing a mix of internal and external resources.

TOTAL BUDGET	\$365K
BUDGET REMAINING	\$33.5K
START DATE	Jan 1, 2017
DUE DATE	Feb 28, 2019
% TIME ELAPSED	61.5%

PROJECTED SCHEDULE

The last status update was 7 months ago. Based on that information, we estimate that this was completed a year ago. Please add a more recent status update for more accurate predictions.

692 days early

Projected End Date: Apr 7, 2017

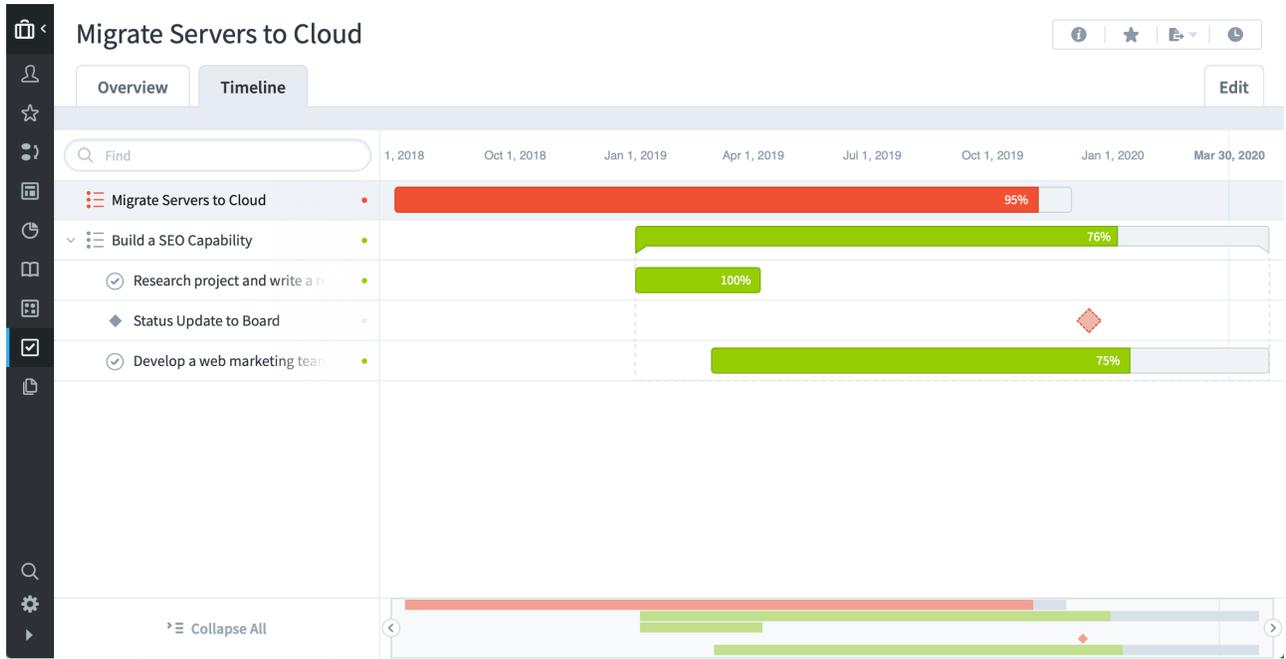
PROJECTED TOTAL BUDGET

5.2% over budget

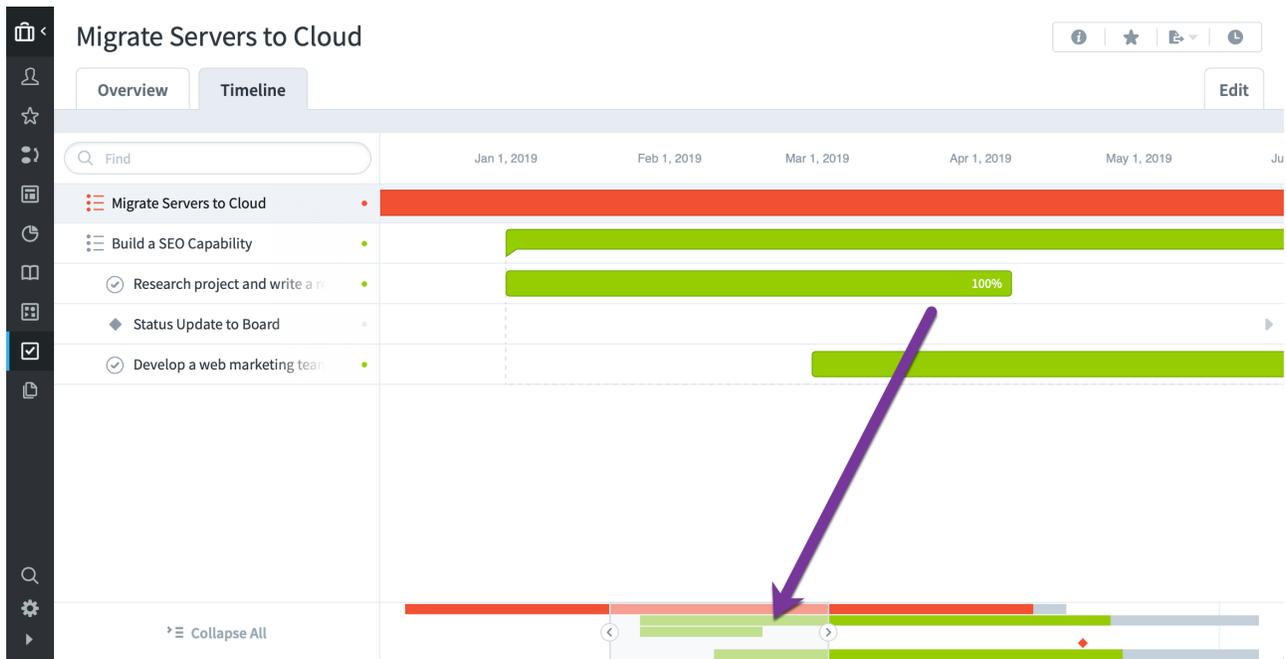
Projected Total: \$384K
Projected Variance: \$19K over budget

Timeline Tab

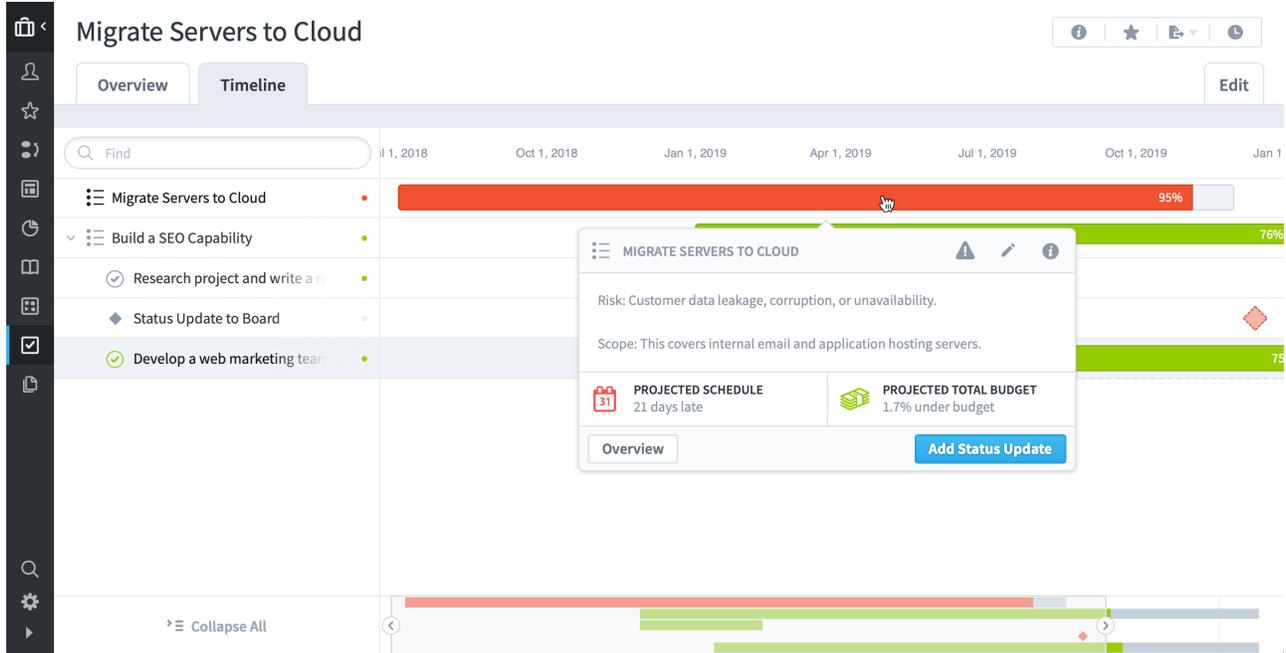
The Timeline tab shows you a fully interactive Gantt chart view of the current organization's initiatives.



Just like everywhere else in Spider Impact, you can expand and collapse the initiative tree on the left. There's also a timeline navigation bar on the bottom that allows you to zoom and pan through time.



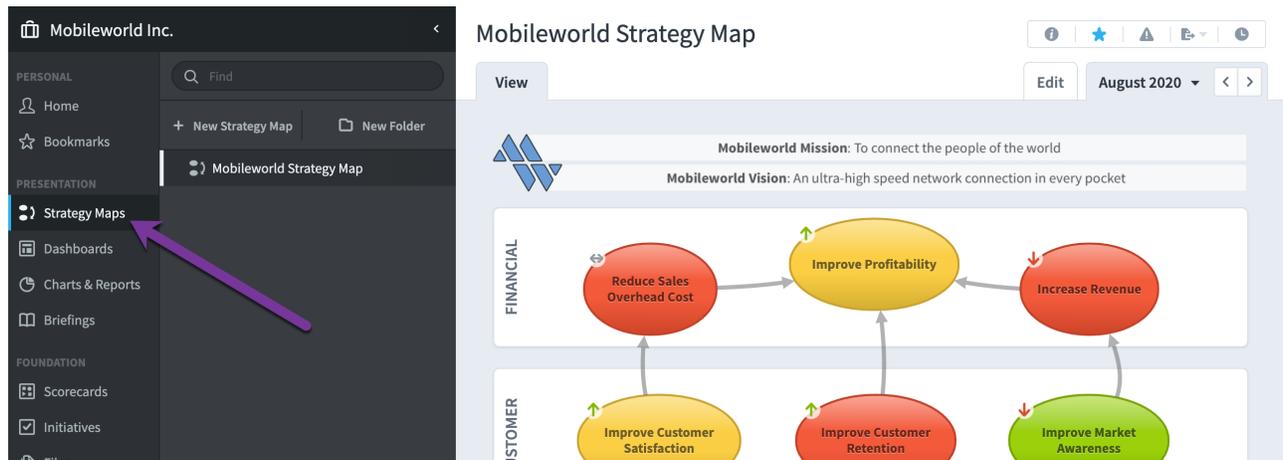
If you click on any of the initiative items in the Gantt chart, you can see detailed information about that item, like its description and the projected budget and schedule performance.



Strategy Maps

Overview

Strategy Maps are similar to Dashboards, except they focus only on big-picture strategy. They have their own section in Spider Impact.



If you don't use the Balanced Scorecard methodology, there's a good chance that you'll want to disable strategy maps. We explain how to do that in the [Choosing Methodology](#) article.

If you're unsure, we highly recommend reading our popular "[What is a Balanced Scorecard?](#)" article to learn more.

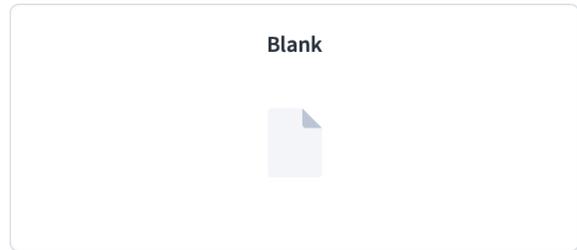
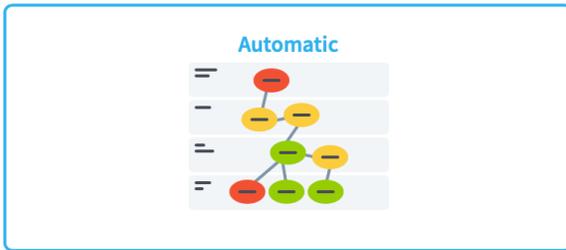
Creating a Strategy Map

When you create a new strategy map, you have a choice between Automatic and Blank.

To get you started with your new strategy map, we can automatically add widgets for each of the 4 perspectives and 12 objectives in this Mobileworld Inc. organization.

Name

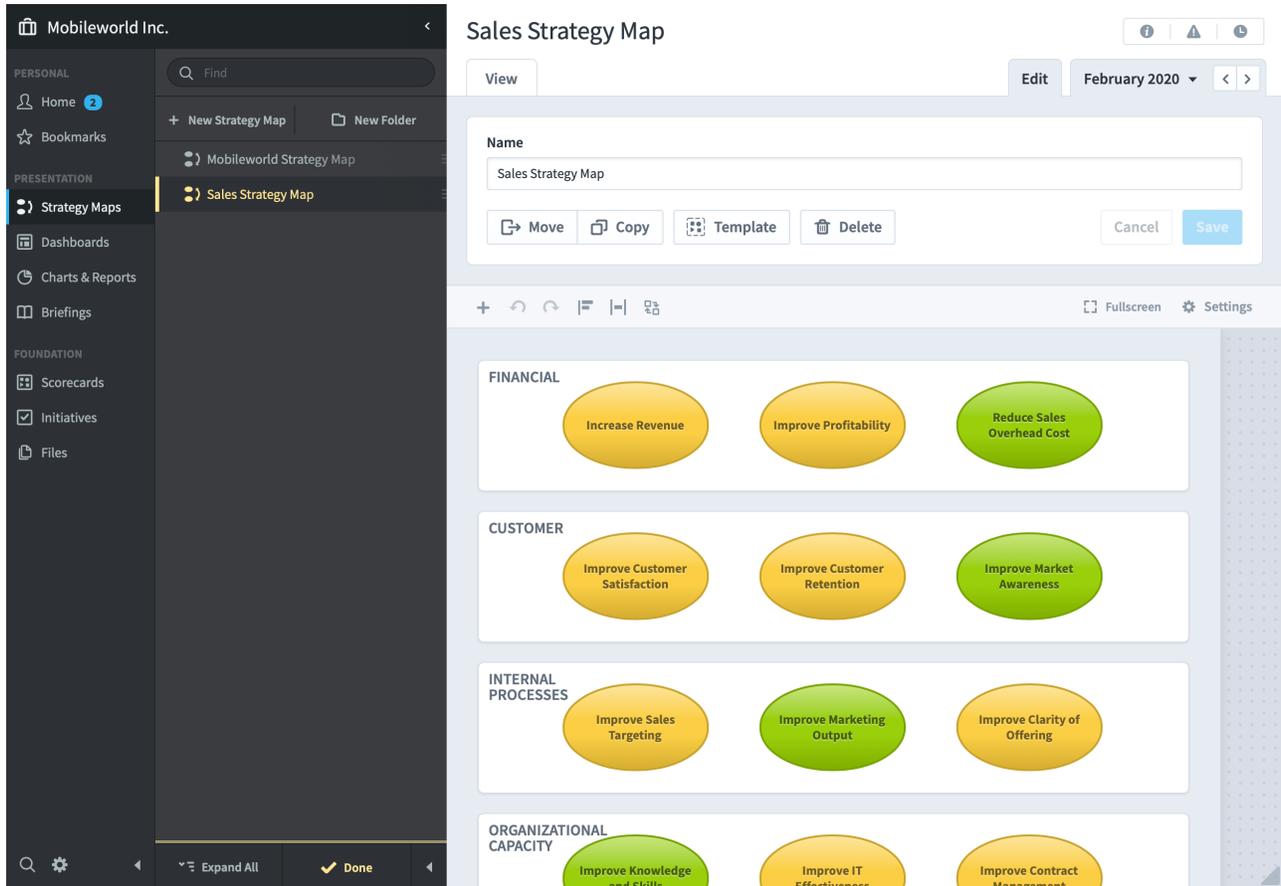
Starting Layout



Cancel

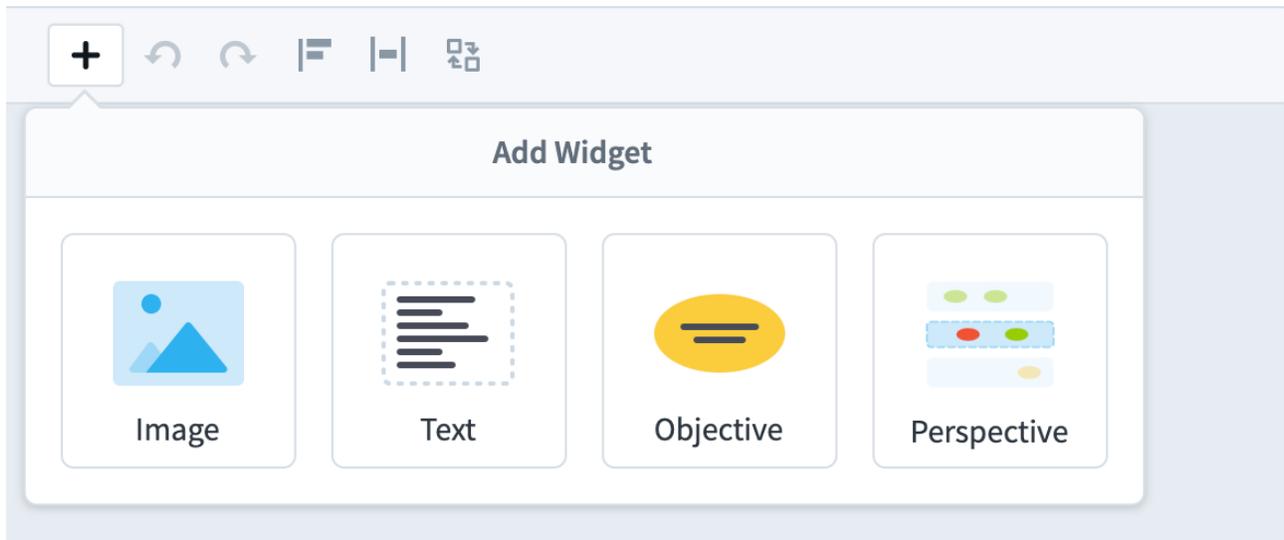
Create

When you choose Automatic, your new strategy map will start with your current organization's perspectives and objectives already on the canvas. This saves a lot of time because all you need to do is adjust the position of your objectives and draw arrows.



Adding Widgets

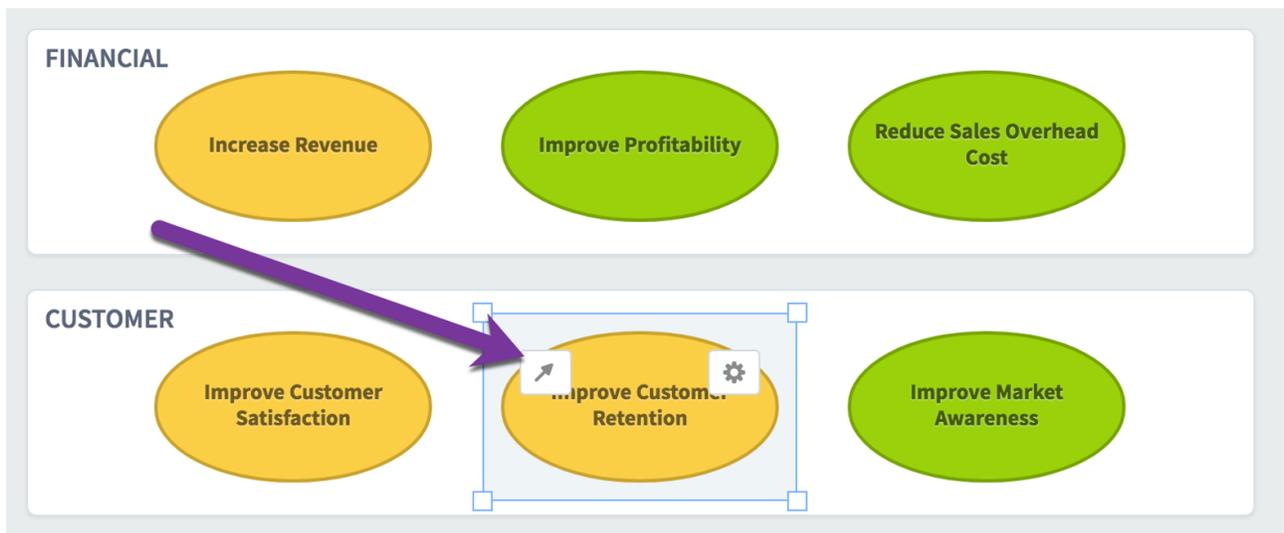
Adding new widgets is exactly the same as in Dashboards too. Just click the *Add Widget* button and choose an Objective or Perspective from the Scorecards section.



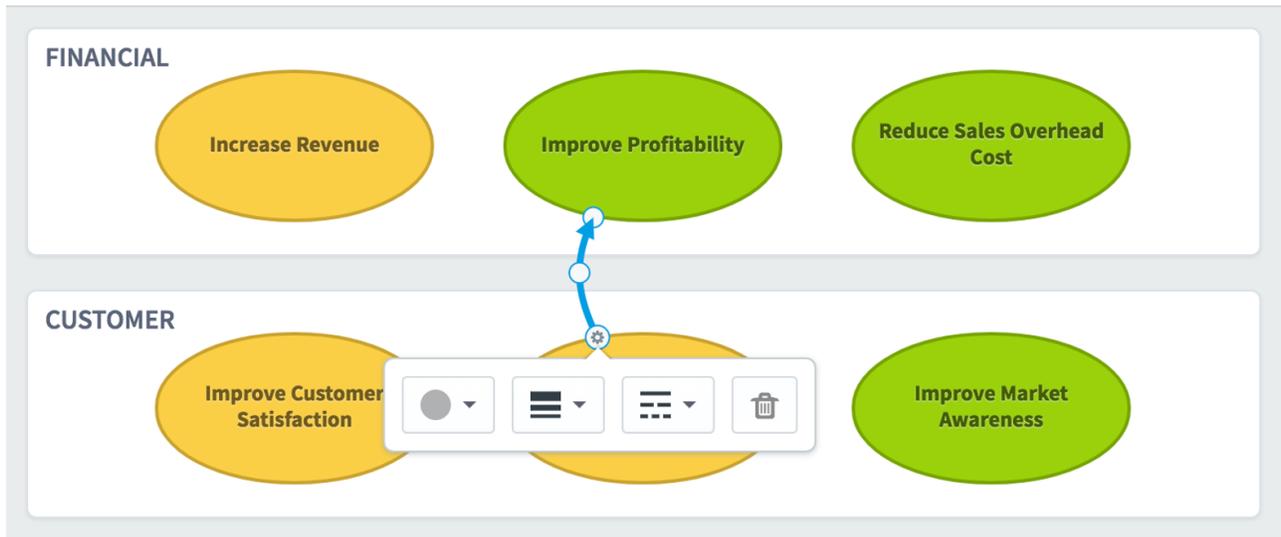
You can also add [images widgets](#) and [text widgets](#), which are the same as on dashboards.

Drawing Arrows

You can draw arrows between the objectives on your strategy maps. Just select the objective where you want the arrow to start, click on the arrow button, and drag the new arrow to another perspective.



You can even change the arrow's thickness, opacity, and dotted style.



Background Images

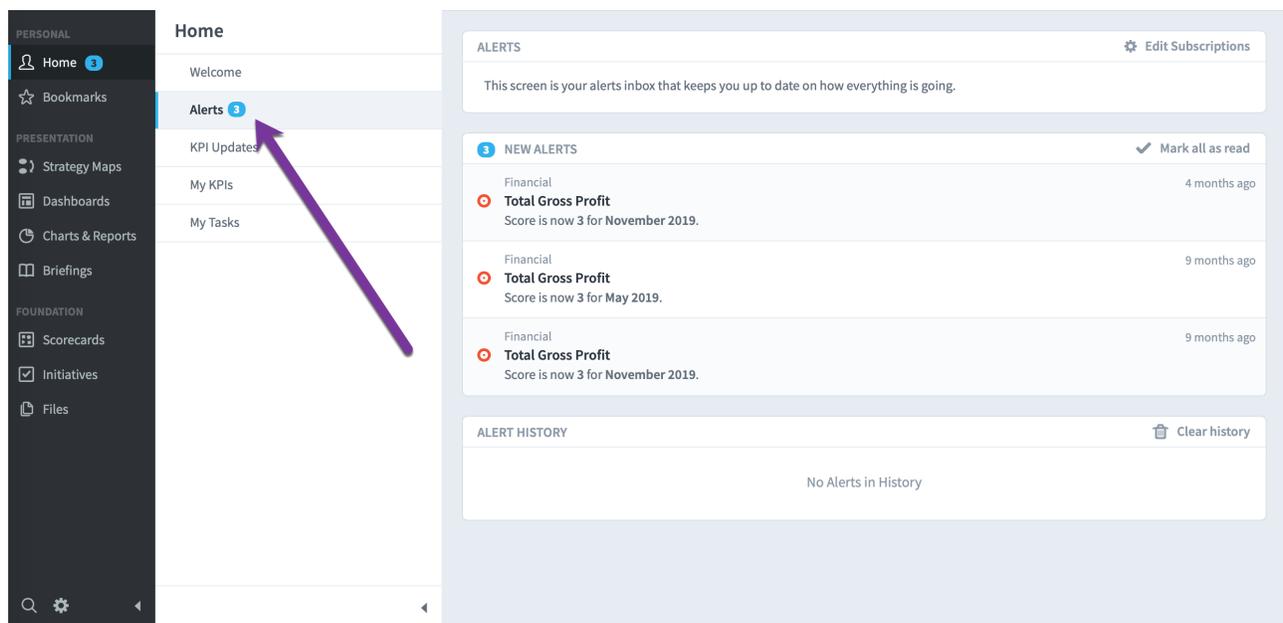
The [Dashboard and Strategy Map Backgrounds](#) article shows you how you can make strategy maps even better with background images.

Overview of Alerts

The Basics

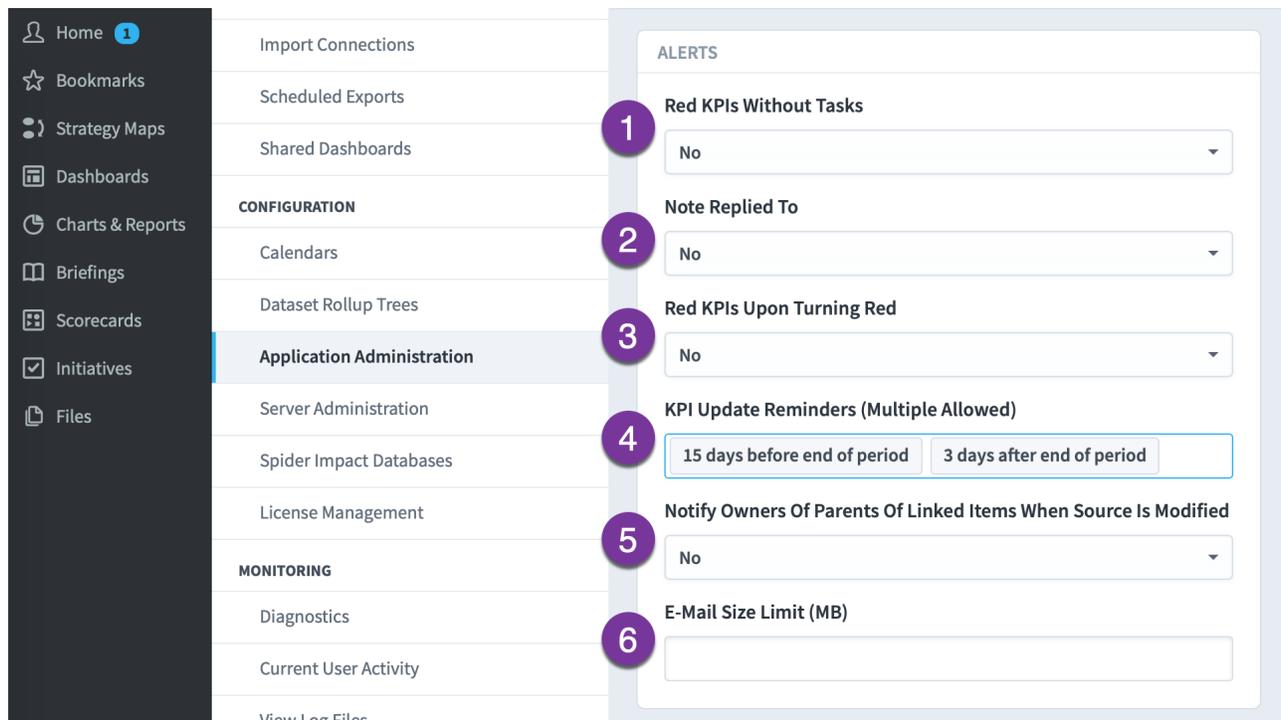
Spider Impact is a tool that encourages communication and collaboration. It helps you stay up-to-date on how every area of your organization is performing. You and your team can browse the various application sections exploring things like dashboards and reports, but it's also incredibly helpful when Spider Impact lets you know when there's something that needs your attention. That's where Alerts come in.

Whenever you get an alert in Spider Impact, you'll get an email (unless you've turned that off). You'll also see that alert on the [Alerts page in the Home section](#).



Application-Wide Alerts

Spider Impact works best when users have to configure as little as possible. With this in mind, there are several types of alerts that you can turn on for every user in the software.

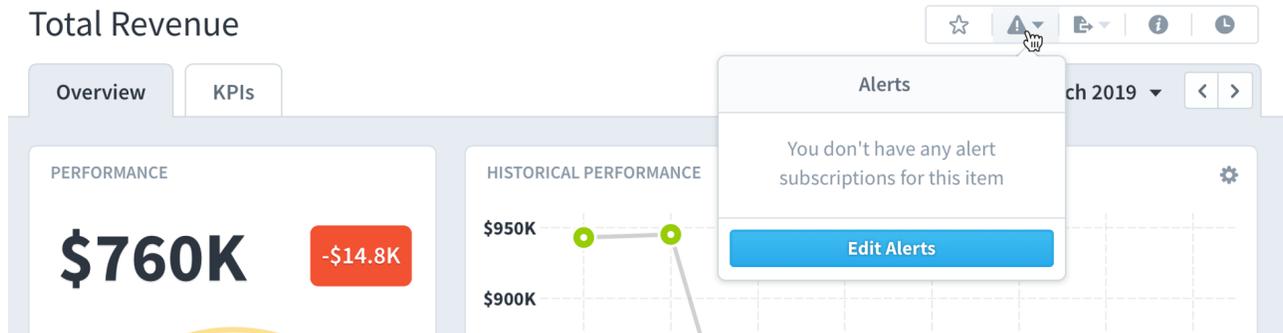


1. **Red KPIs without tasks** will send an alert to any KPI owner when that KPI turns red and it doesn't have an initiative related item to correct the KPI performance.
2. **Note replied to** will alert the author of any note when it gets a new reply.
3. **Red KPIs upon turning red** will send an alert to the KPI owner when any KPI turns red.
4. **KPI update reminders** will send out alerts to KPI updaters to remind them to update their KPI values when they haven't yet done so. In the example above, Spider Impact will send out alerts 15 days before the period is over to help people get their data in ahead of time, as well as 3 days after to remind people who have forgotten.
5. **Notify owners of parents of linked items when source is modified** will send the owners of linked scorecard items an alert when the source is edited or moved.

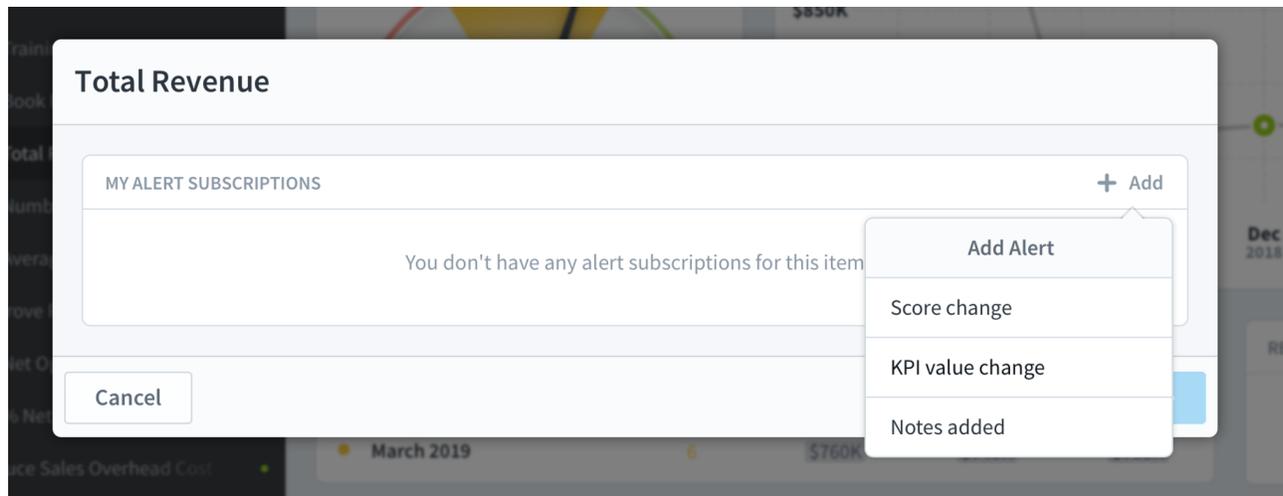
Finally, you can set an email size limit (6) to prevent Spider impact from attaching files larger than your email server can handle. Instead, your email will contain a link that allows you to download the file from the web.

Creating a New Alert

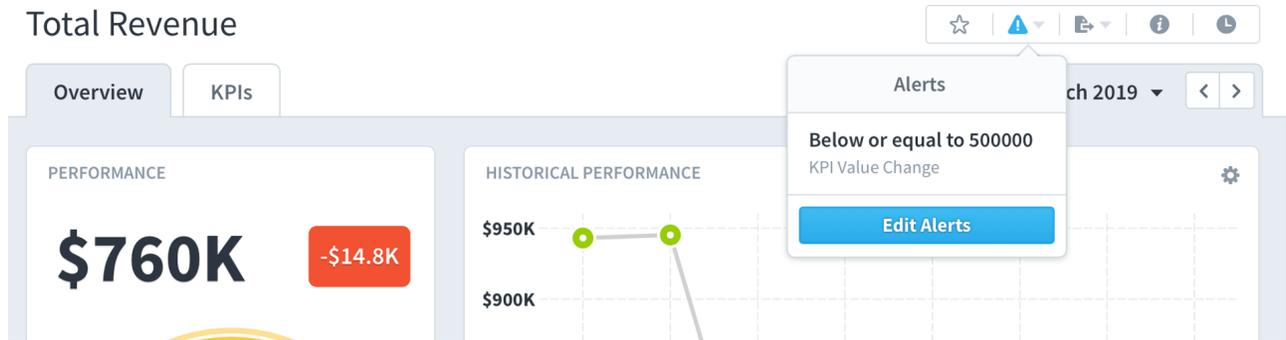
To create an Alert, just go to the Overview tab in the Scorecards section and click on the Alert button in the header. In this example we don't have any alerts set for the "Total Revenue" KPI, so we'll click the "Edit Alerts" button.



This opens the Edit Alerts dialog where we can add an alert for things like the Score or KPI value changing, or when someone adds a Note to this scorecard item or anything underneath it in the tree.



After you create an alert for a scorecard item, the Alert icon now turns blue. This is similar to the bookmark icon turning blue when you have a bookmark for the item.



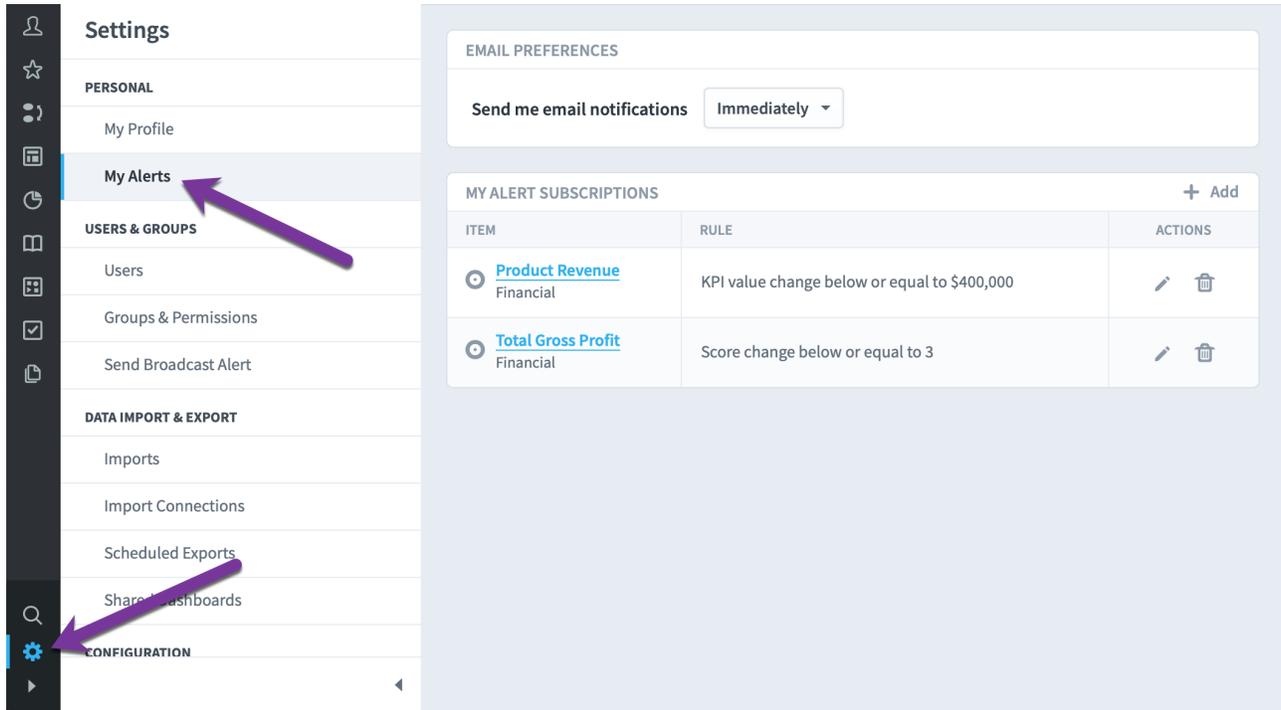
In addition to being able to create alerts for Scorecard items, you can also subscribe to be alerted when Dashboards and Briefings are published. That's covered in the [Subscribing and Publishing](#) article.

Broadcast Alerts

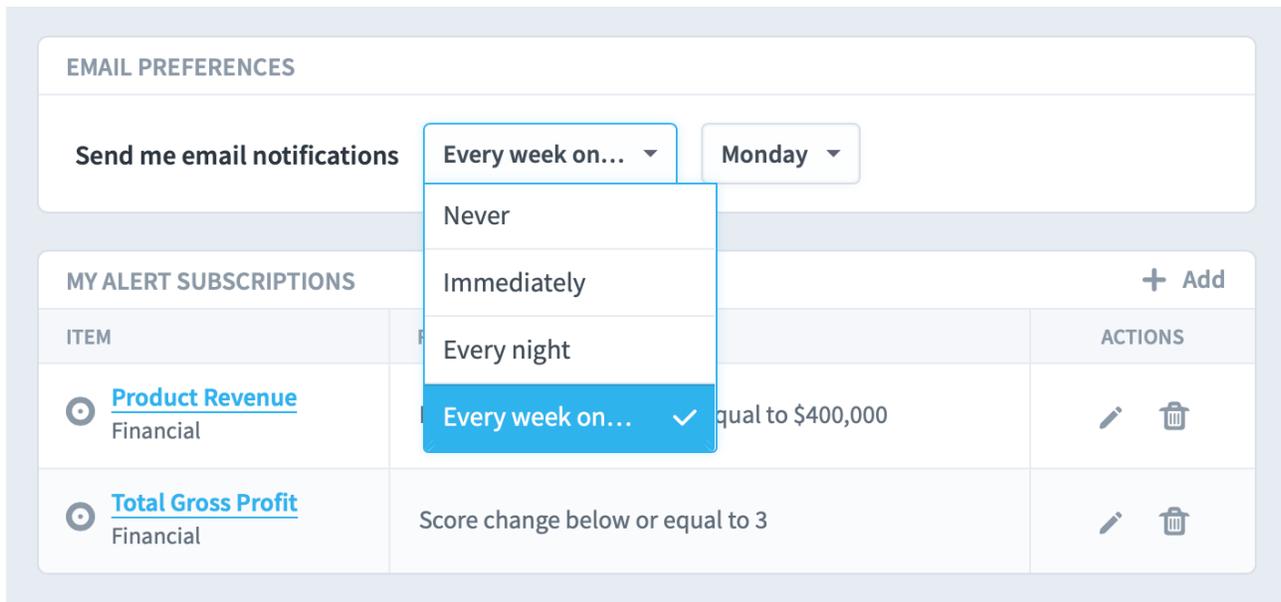
You can manually send alert messages to specific people or teams. That's covered in the [Broadcast Alerts](#) article.

Managing Alerts

You can manage all of your Alerts in the My Alerts page in the Admin section, which also includes the ability to including create new Alerts.



By default, Spider Impact will send you an email notification immediately when you get an Alert. You can change this to send emails nightly, weekly, or never.

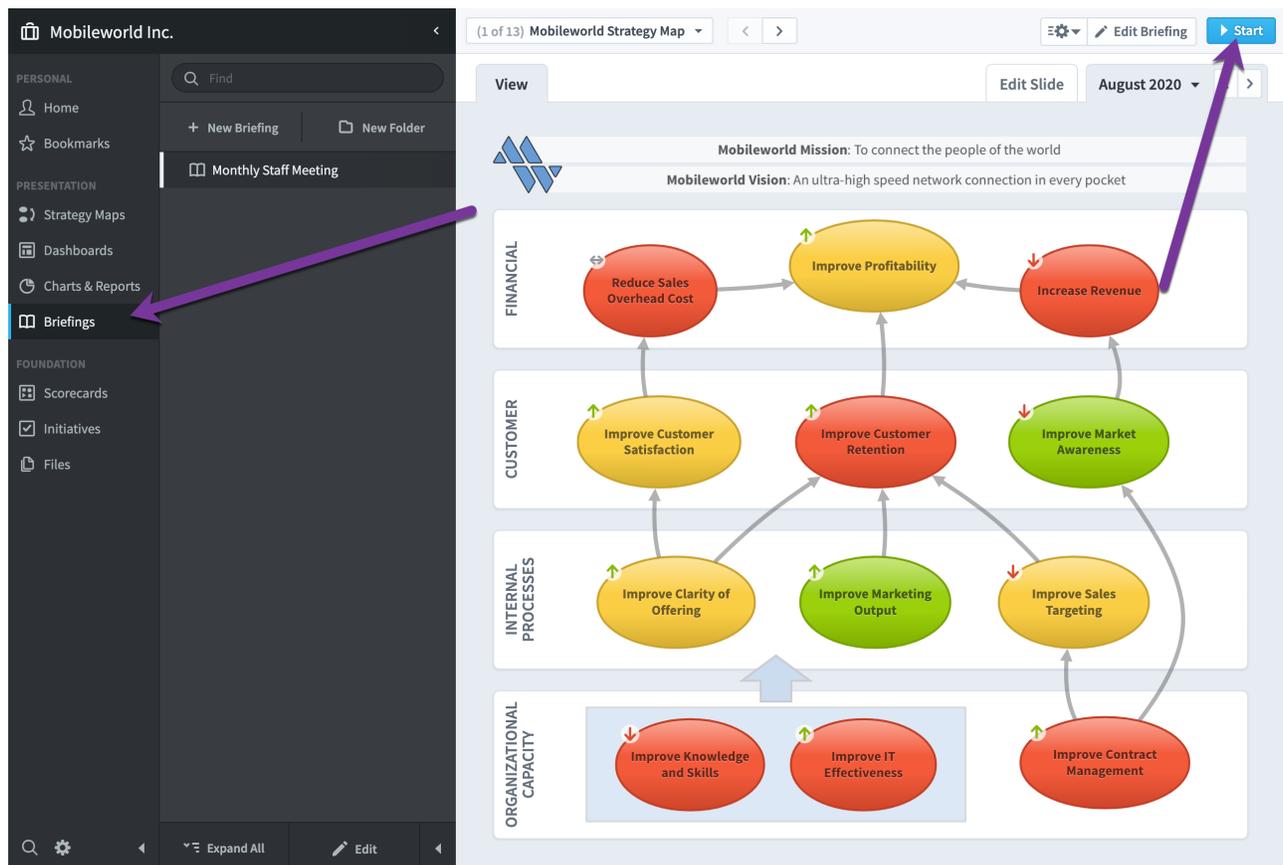


Briefings

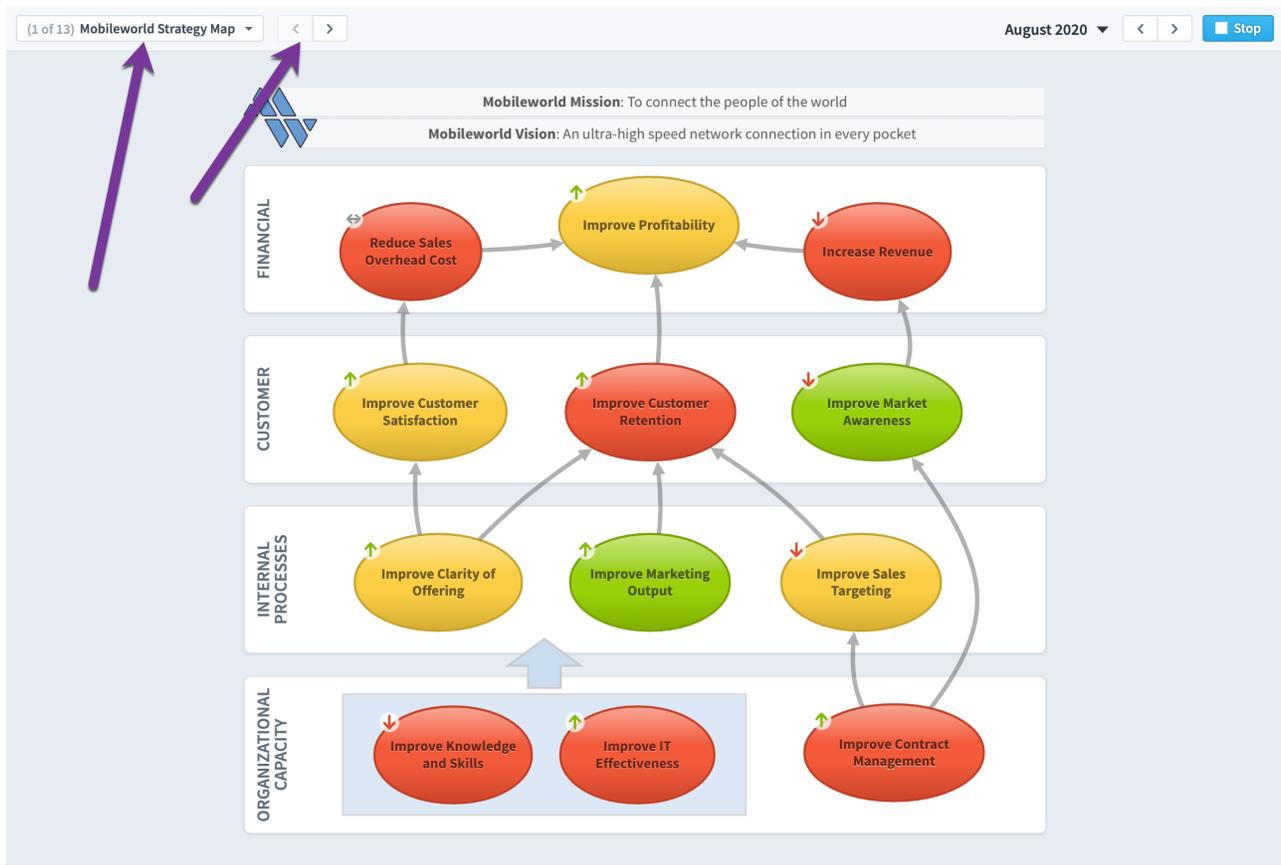
Starting a Briefing

Briefings are collections of pages from throughout Spider Impact. They allow you to run meetings from directly within the software.

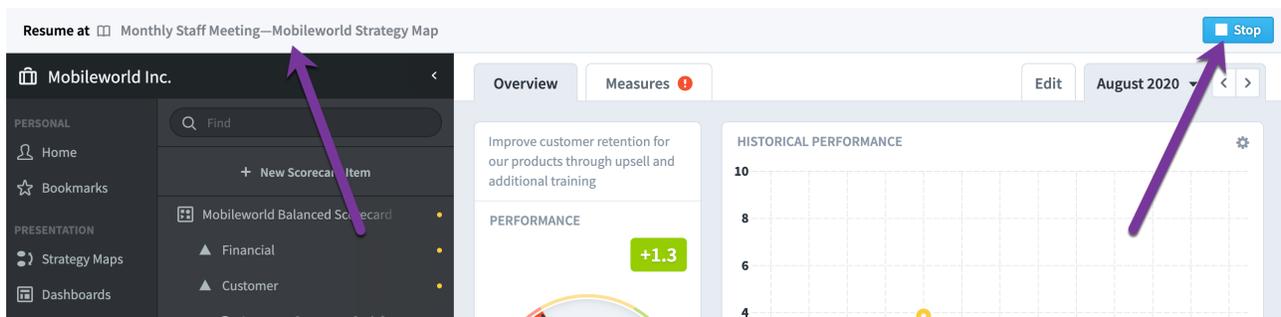
To start a briefing, go to the Briefings section, select which briefing you want, and click Start.



All of the other controls in Spider Impact slide out and you're now in full-screen briefing mode. You can advance through slides using the controls in the upper left corner.

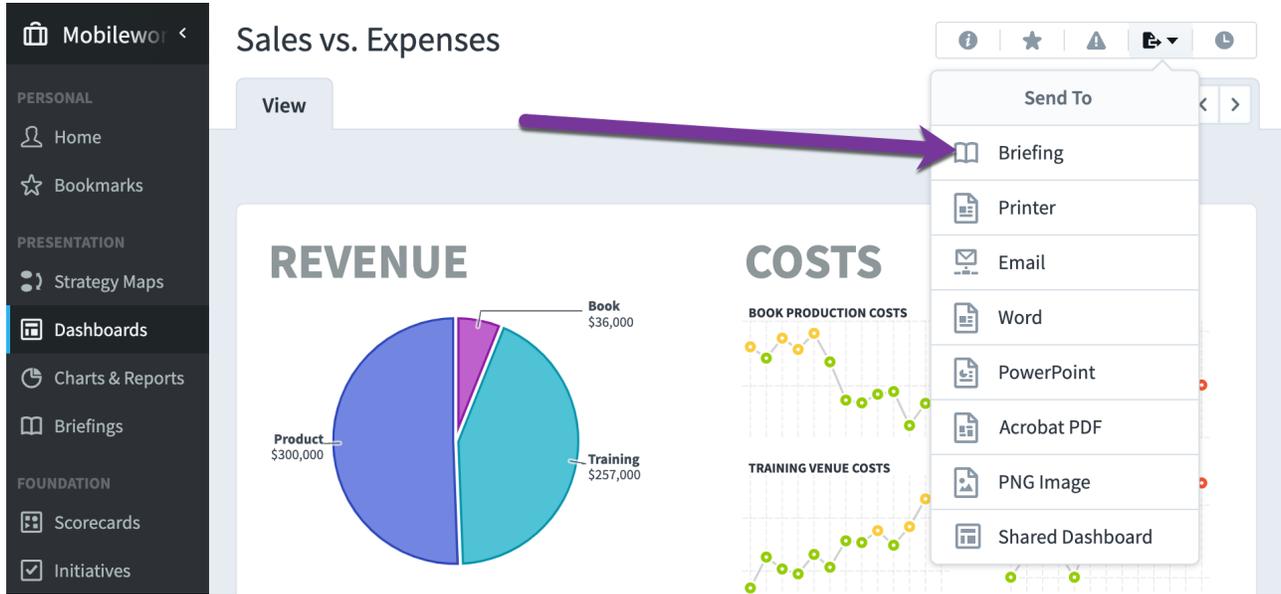


At any point in the briefing you can click on drill-down links in your slides. This will pause the briefing and take you to that section in Spider Impact, allowing you to answer questions on the fly using the live data in the software. The entire time the briefing is paused you'll see a bar on the top of the screen with links to stop or resume the briefing on the same slide you were on before.

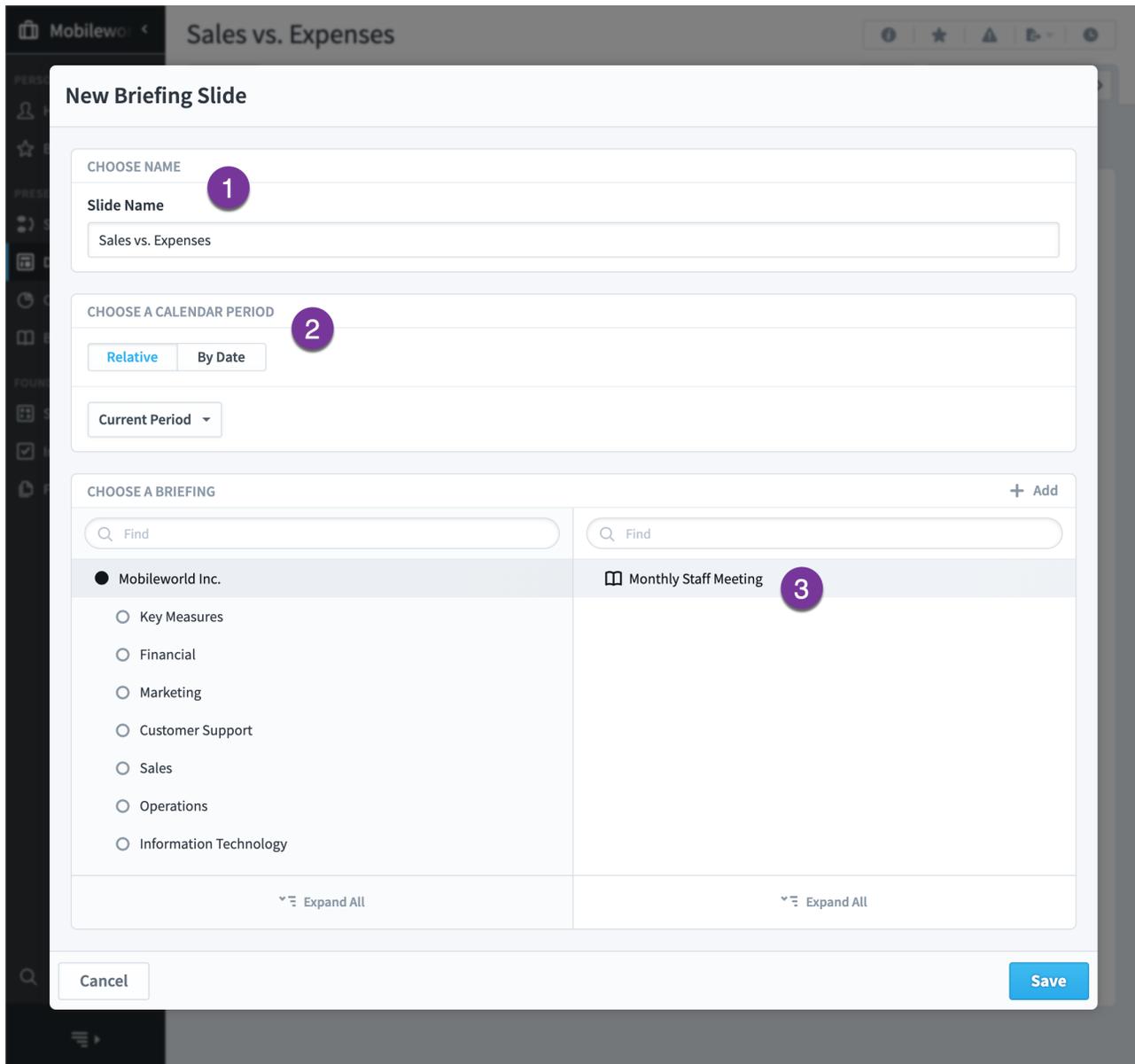


Adding Briefing Slides

You can add slides to a briefing by clicking on the "Send to" button in the top menu bar and choosing Briefing.



This opens a dialog with three things to choose:

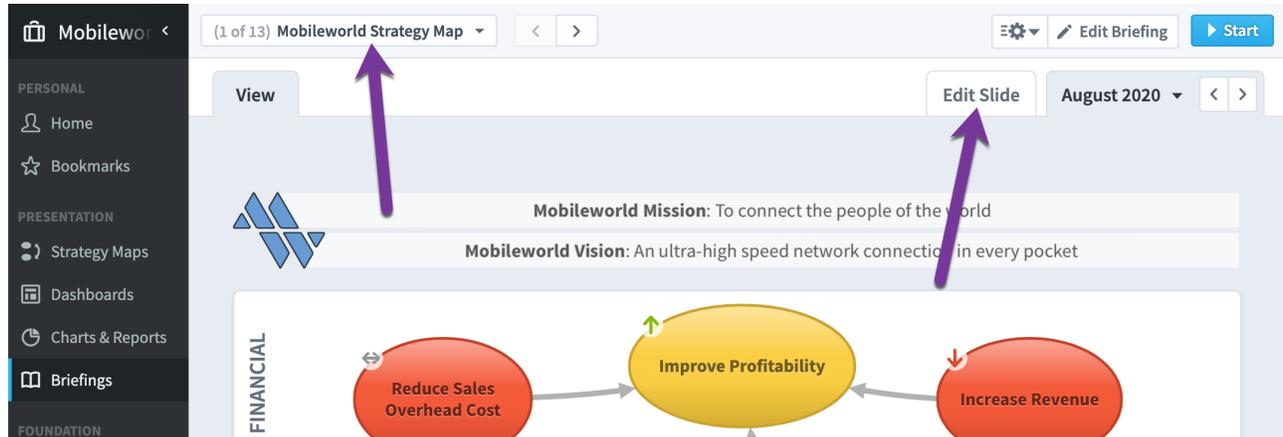


1. **The slide name.** This defaults to the name of the item you're adding.
2. A **calendar period** for the slide. We'll explain this more below.
3. Which **briefing** you want to add the slide to.

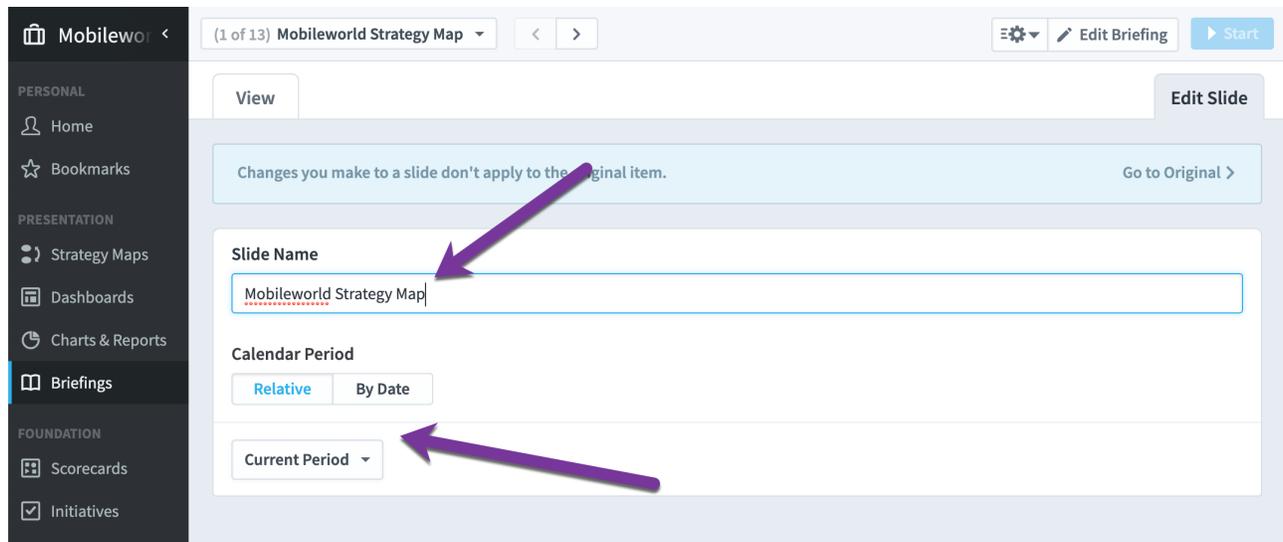
When you click Save, the slide will be added to your briefing.

Editing Slides

You can edit an individual slides in the briefing section by choosing the slide you want in the slide control on the top and then going to the Edit Slide tab.

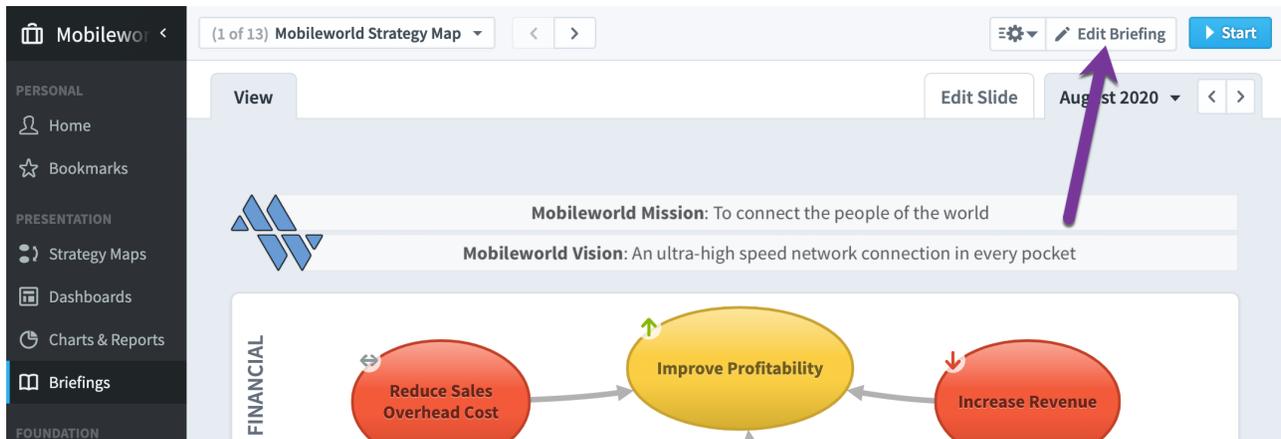


The only things to edit here are the things we set up when creating the slide, its name and calendar period.

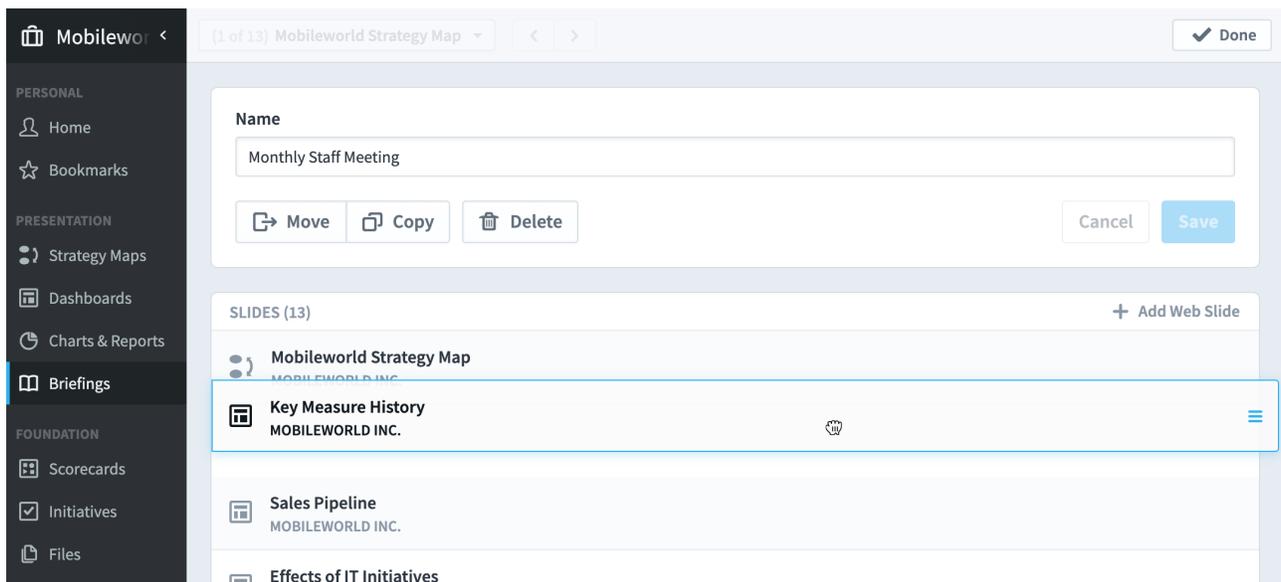


Editing a Briefing

To edit a briefing, click the Edit Briefing button on top.

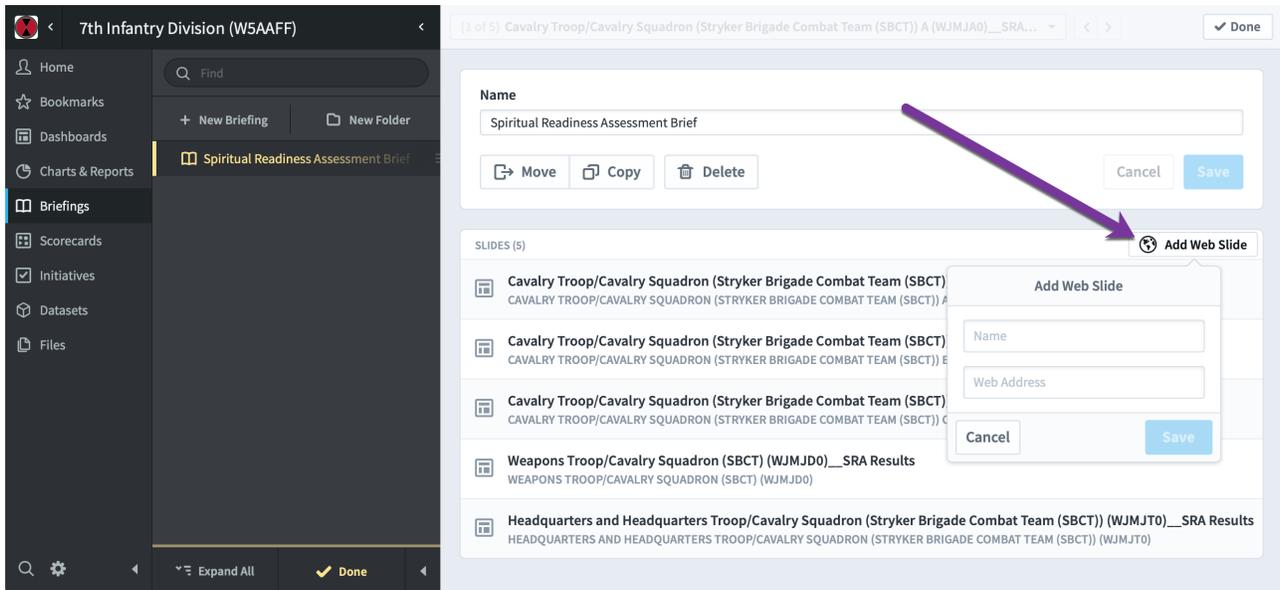


Here you can delete slides, or drag and drop them to rearrange them.

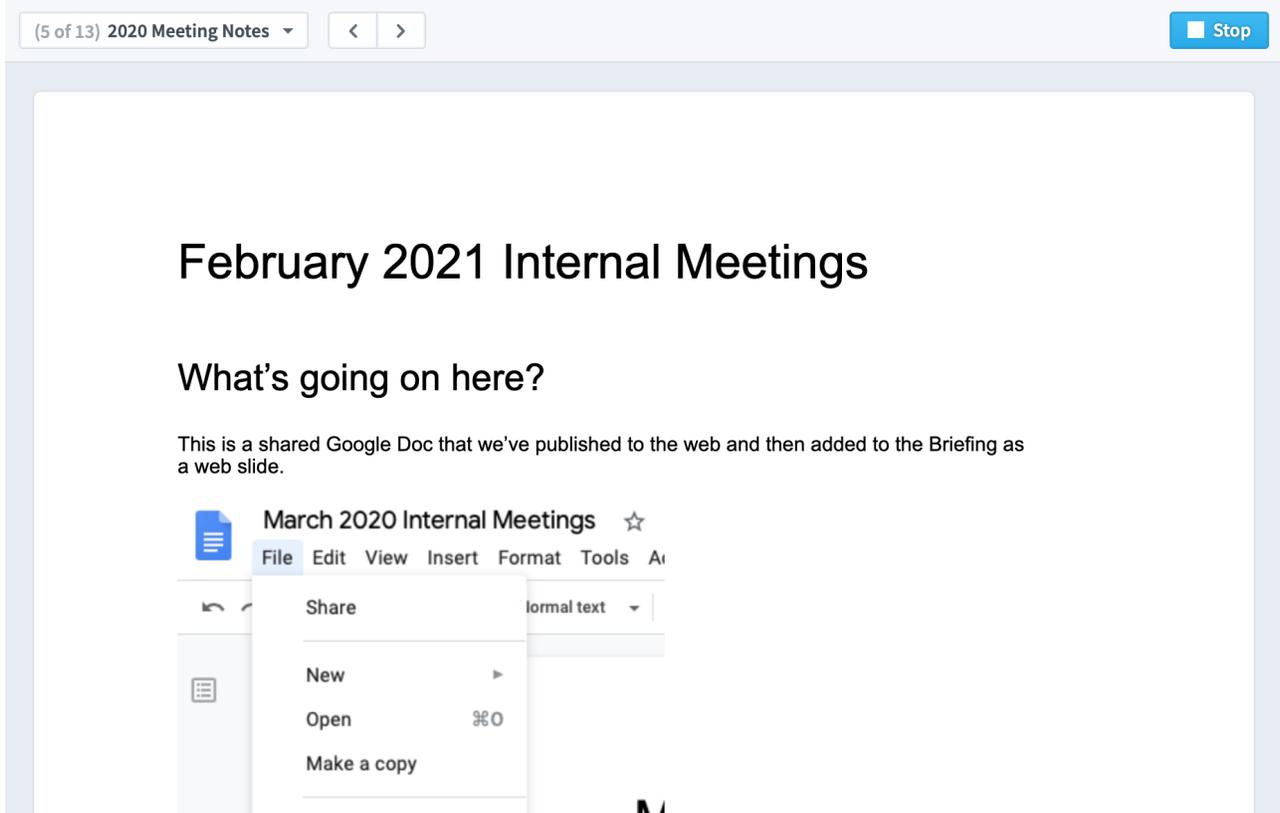


Web Slides

When you're editing a briefing you can also add a Web Slide that shows content from external web pages or web apps that support embedding. This is similar to the [embedded content dashboard widget](#), except that it's an entire briefing slide rather than a widget on a dashboard.

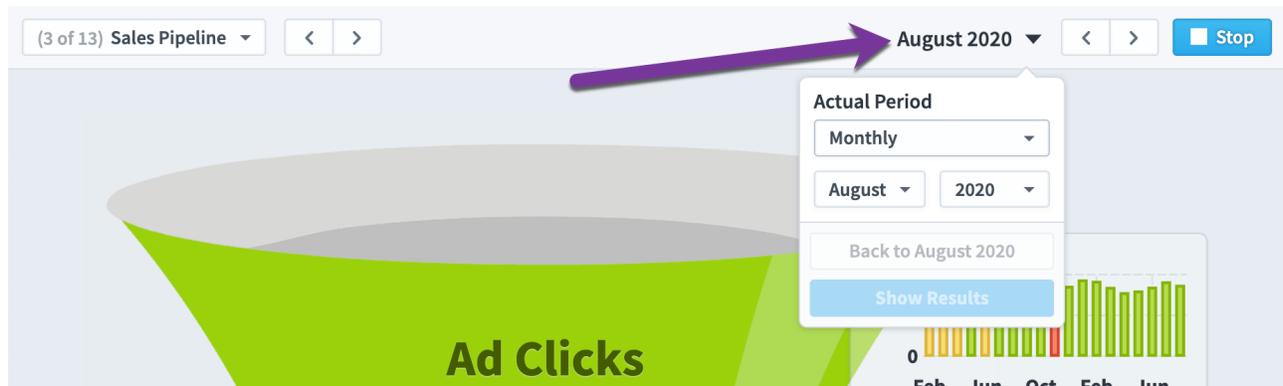


For example, here we're showing an embedded Google Doc that has meeting notes we want to review.

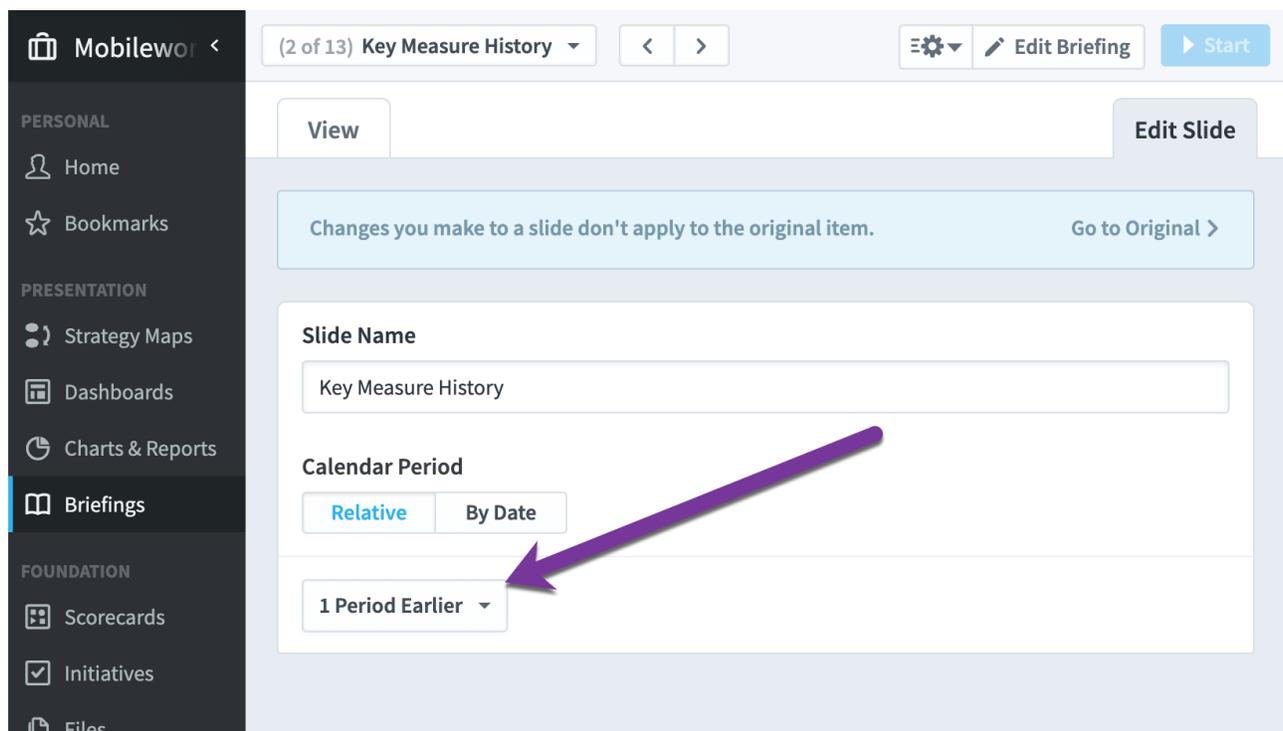


Briefing Slide Calendar Periods

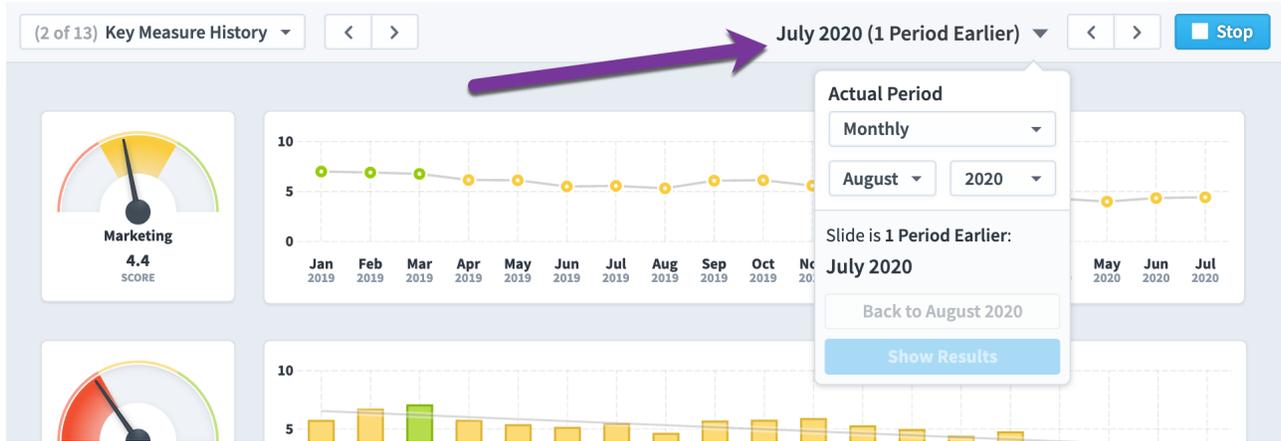
Throughout the software, Spider Impact has a calendar period selector in the upper right corner that shows you the period for the data that you're viewing. It works the same in dashboards as it does everywhere else. If you click the name of the calendar period on top, you can choose to view another period.



You can choose which calendar periods to show for individual slides, however. In this example, we're changing the Key Measure History slide to show data from 1 period earlier.



During your briefing, you'll see this clearly labeled on the top of your briefing. You can still change the overall calendar period selector, of course, but it's also clear both the overall change you're making and how it will affect your slide.



Similarly, you can choose to show a specific calendar period.

(4 of 13) Effects of IT Initiatives < > Edit Briefing Start

View Edit Slide

Changes you make to a slide don't apply to the original item. Go to Original >

Slide Name
Effects of IT Initiatives

Calendar Period
Relative By Date
Monthly August 2021

And this is what it looks like during a briefing.

(4 of 13) Effects of IT Initiatives < > August 2021 (Specific Period) < > Stop

MIGRATE SERVERS TO CLOUD

BUILD A SEO CAPABILITY

Actual Period
August 2020

Slide is Specific Period:
Monthly

August 2021

Back to August 2020

Show Results

Exporting and Sharing

Exporting KPI Value Import File

You can [import KPI values](#) in multiple places throughout Spider Impact. Simple imports require a very specific data format for your KPI values, and you can create these files to match your existing scorecards.

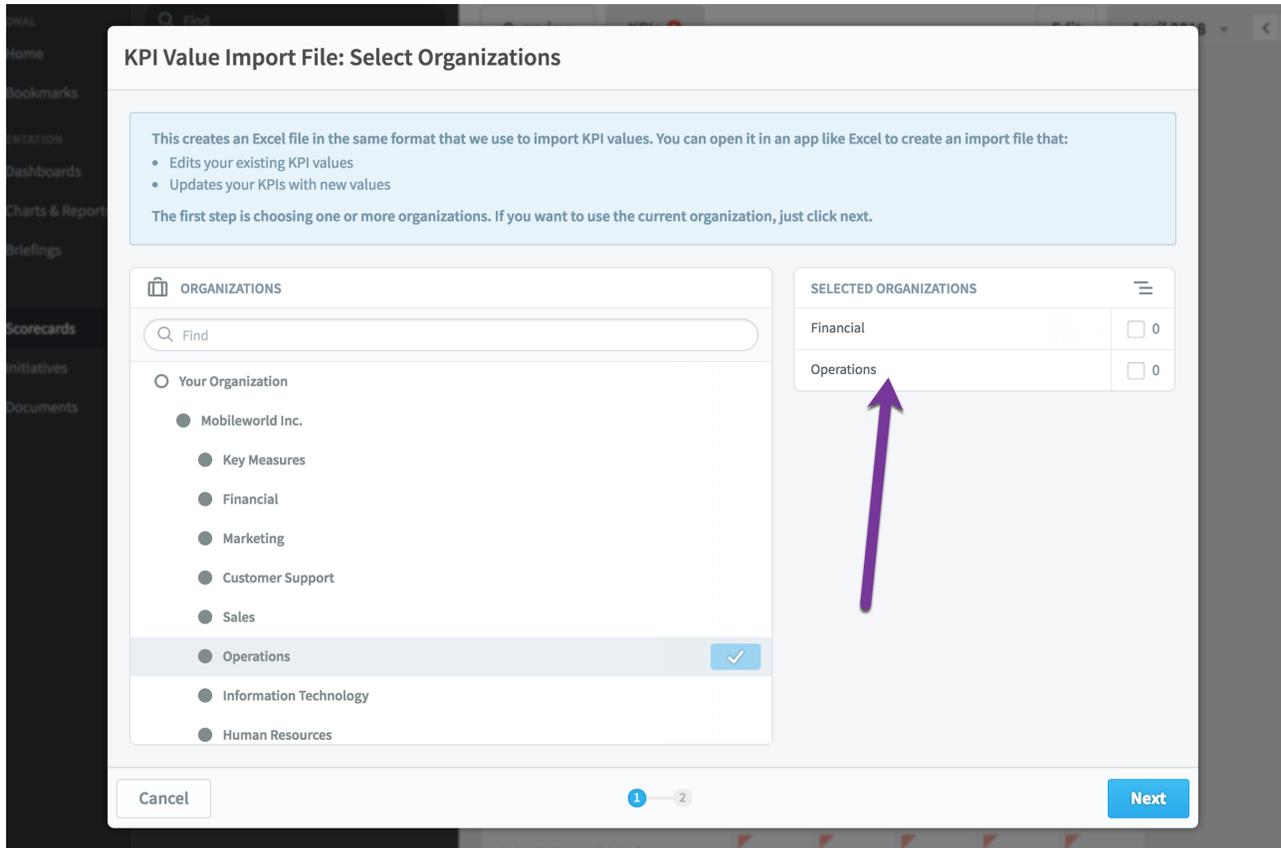
Just click the "Send To" button in the menu bar on the top right, and select "KPI Value Import File." This is useful when exporting and importing KPI values, or for creating blank import files to be filled in with KPI values manually.

The screenshot shows a dashboard titled "Financial Profit and Loss" with two tabs: "Overview" and "KPIs" (which has a red notification icon). A table of measures is displayed, and a "Send To" menu is open on the right. A purple arrow points from the "KPI Value Import File" option in the menu to the "Product Revenue" cell in the table.

MEASURES	JAN 2018	FEB 2018	MAR 2018
Product Revenue	\$122K	\$129K	\$133K
Training Revenue	\$1,262	\$2,812	\$4,762
Book Revenue	\$37.6K	\$36.9K	\$38.2K
Product Costs	\$278K	\$278K	\$278K
Training Venues	\$39.2K	\$38.9K	\$39.1K

- Briefing
- Printer
- Acrobat PDF
- PowerPoint
- Email
- Excel
- Scorecard Import File
- KPI Value Import File**

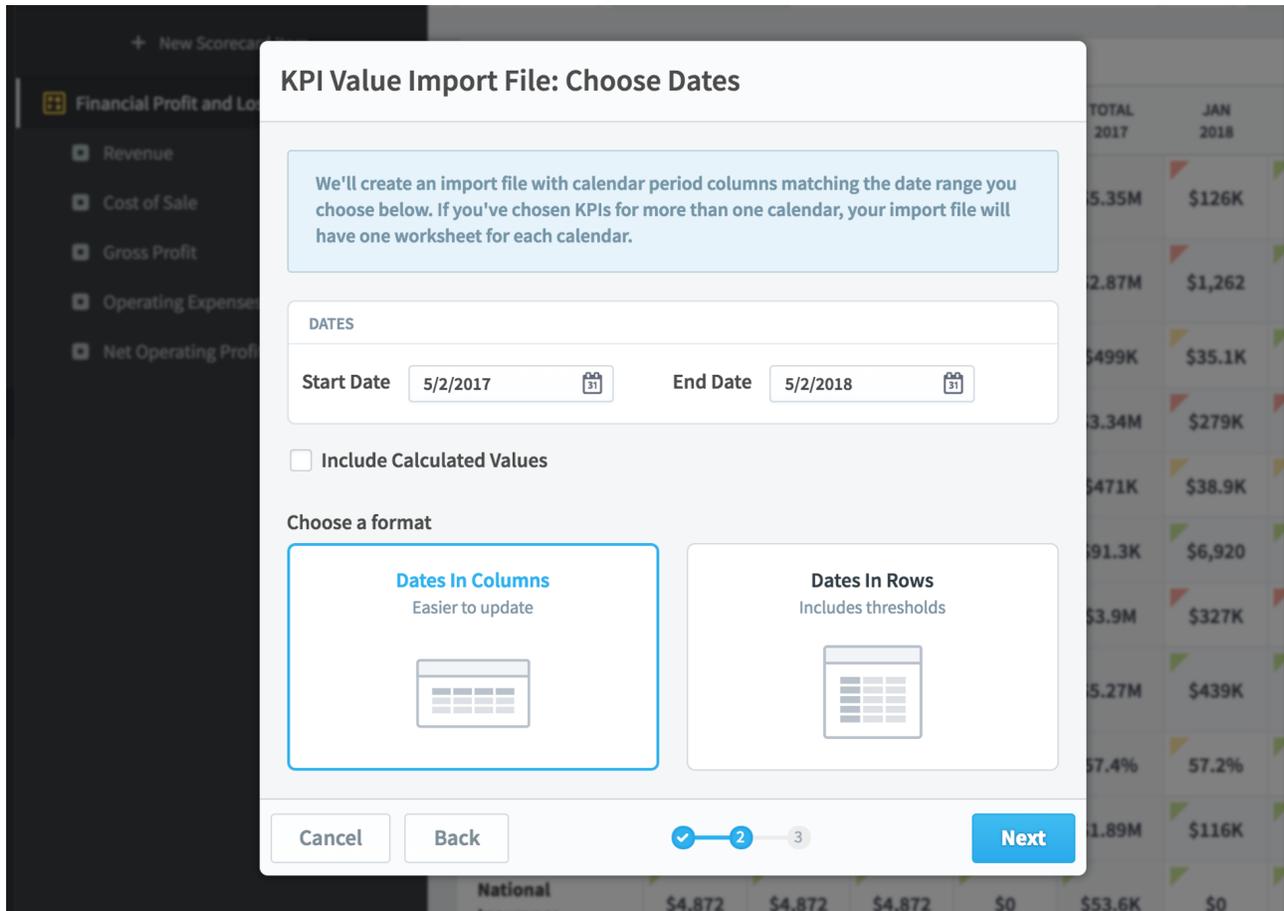
This will open a dialog and the first step is choosing which organizations you want to include in your file. It adds the current organization by default, so if that's all you want, just click next.



The next step has more options about what to include in the import file you're creating. You'll need to choose a start and end date, and you can choose whether to include calculated values or not. Most importantly, you'll want to choose which format you want your data to be in.

"Data in Columns" has one row for every KPI, with separate columns for each date. If you're going to be manually editing the spreadsheet, this is a great option to choose. "Data in rows" puts each KPI value in a row, which means each KPI spans multiple rows. It's harder for people to edit, but it has the added benefit of including thresholds. This is a great option for exporting data that isn't going to be edited before it's imported again.

Both options are readable by Spider Impact when you're importing the scorecard. In this example we'll choose "Dates in Columns."



The final step is a preview of your file before you download it. This is to make sure you've set things up properly.

KPI Value Import File

PREVIEW

ID	MEASURE	MAY 1, 2017	JUN 1, 2017	JUL 1, 2017	AUG 1, 2017	SEP 1, 2017	OCT 1, 2017	NOV 1, 2017	DEC 1, 2017	JAN 1, 2018	FEB 1, 2018	MAR 1, 2018	APR 1, 2018	MAY 1, 2018
961	Net Operating Profit (before tax)	\$84.7K	\$82.6K	\$84.7K	\$86.2K	\$84.1K	\$83.1K	\$84K	\$80.6K	\$73.4K	\$79K	\$79.8K	\$72.3K	\$69.2K
962	% Net Operating Profit	11.1%	10.9%	11.1%	11.3%	11%	10.9%	11%	11.3%	12.1%	11.1%	12.1%	11.9%	11.2%
991	% Trainer utilization	61%	70%	71%	71%	65%	69%	71%	76.9%	82.4%	89.3%	85.3%	78.2%	71.3%
992	% Time spent at client location	38%	38%	48%	39%	42%	45%	46%	45.6%	45.4%	45%	42.1%	38.5%	40.2%
993	Average client training feedback score	84%	88%	80%	86%	96%	81%	83%	85%	82.1%	81.5%	76.8%	81.1%	74.9%
994	Number of feedback forms sent	18	22	20	21	22	18	24	24	23	23	22	22	22
995	Number of feedback forms returned	8	12	9	8	14	15	10	10	9	8	8	9	9

Cancel Back 1 2 3 Download Import File

When you click the "Download Import File" button, it will save a spreadsheet that matches the preview. If you choose "Data in Columns" and have KPIs that use different calendars, your spreadsheet will have one worksheet for every calendar.

Exporting Scorecard Import File

You can [import scorecard items](#) in the Scorecards section. These imports require a very specific data format, and you can create these files to match your existing scorecards.

Just click the "Send To" button in the menu bar on the top right, and select "Scorecard Import File."

The screenshot displays the 'Mobileworld Scorecard' interface. On the left is a dark sidebar with navigation options: PERSONAL (Home, Bookmarks), PRESENTATION (Strategy Maps, Dashboards, Charts & Reports, Briefings), and FOUNDATION (Scorecards, Initiatives, Files). The main content area shows 'Mobileworld Inc.' and 'Mobileworld Scorecard' with tabs for 'Overview' and 'KPIs'. A 'PERFORMANCE' gauge shows a score of 5.6. A 'HISTORICAL PERFORMANCE' chart shows data from Feb 2019 to Feb 2020. A table titled 'DATA USED IN CALCULATIONS' is visible below the chart.

	SCORE	WEIGHT
▲ Financial	6.5	16.7%
▲ Customer	5.2	50%
▲ Internal Processes	5.3	16.7%

A 'Send To' menu is open in the top right corner, listing options: Briefing, Printer, Email, Word, PowerPoint, Acrobat PDF, **Scorecard Import File** (highlighted with a purple arrow), and KPI Value Import File. Below the menu, 'RELATED ITEMS' includes 'Financial Overview Dashboard' and 'Monthly Staff Meeting'.

This exports a spreadsheet of your entire scorecard that is in the format required for scorecard item imports.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Scorecard	Theme	Measure	Organization	Description	Scoring Type	Calendar	Aggregation	Data Type	Weight	Is yes good?	Are higher vs	Start date	Archive date	Threshold	Threshold
2	Financial Profit and Loss			Financial						1						
3		Revenue		Financial						1						
4			Product Reve	Financial		Goal/Red Fl	Monthly	Sum	Currency	1					450,000	465,000
5			Training Reve	Financial		Goal/Red Fl	Monthly	Sum	Currency	1					255,000	260,000
6			Book Revenue	Financial		Goal/Red Fl	Monthly	Sum	Currency	1					35,000	40,000
7		Cost of Sale		Financial						1						
8			Product Cost	Financial		Goal/Red Fl	Monthly	Sum	Currency	1					275,834	275,000
9			Training Ven	Financial		Goal/Red Fl	Monthly	Sum	Currency	1					39,584	38,750
10			Book Product	Financial		Goal/Red Fl	Monthly	Sum	Currency	1					8,334	7,500
11			Total Costs	Financial		Goal/Red Fl	Monthly	Sum	Currency	1					323,750	321,250
12		Gross Profit		Financial						1						
13			Total Gross f	Financial		Goal/Red Fl	Monthly	Sum	Currency	1					422,250	432,917
14			% Gross Prof	Financial		Goal/Red Fl	Monthly	Average	Percentage	1					56.6	57.4
15		Operating Expenses		Financial						1						
16			Salaries & W	Financial		Goal Only	Monthly	Sum	Currency	1		FALSE			153,096	
17			National Inst	Financial		Goal Only	Monthly	Sum	Currency	1		FALSE			21,128	
18			Pension Cont	Financial		Goal Only	Monthly	Sum	Currency	1		FALSE			4,593	
19			Marketing &	Financial		Goal Only	Monthly	Sum	Currency	1		FALSE			49,021	
20			Sales & Geni	Financial		Goal Only	Monthly	Sum	Currency	1		FALSE			30,167	
21			Interest & B	Financial		Goal Only	Monthly	Sum	Currency	1		FALSE			7,542	
22			Insurance	Financial		Goal Only	Monthly	Sum	Currency	1		FALSE			15,084	
23			Office Renta	Financial		Goal Only	Monthly	Sum	Currency	1		FALSE			24,888	
24			IT & Commu	Financial		Goal Only	Monthly	Sum	Currency	1		FALSE			23,380	
25			Travel	Financial		Goal Only	Monthly	Sum	Currency	1		FALSE			13,575	
26			Amortisatio	Financial		Goal Only	Monthly	Sum	Currency	1		FALSE			15,084	
27			Total Operat	Financial		Goal Only	Monthly	Sum	Currency	1		FALSE			357,554	
28		Net Operating Profit		Financial						1						
29			Net Operatir	Financial		Goal/Red Fl	Monthly	Sum	Currency	1					63,917	75,364
30			% Net Opera	Financial		Goal/Red Fl	Monthly	Average	Percentage	1					8.6	10
31																
32																

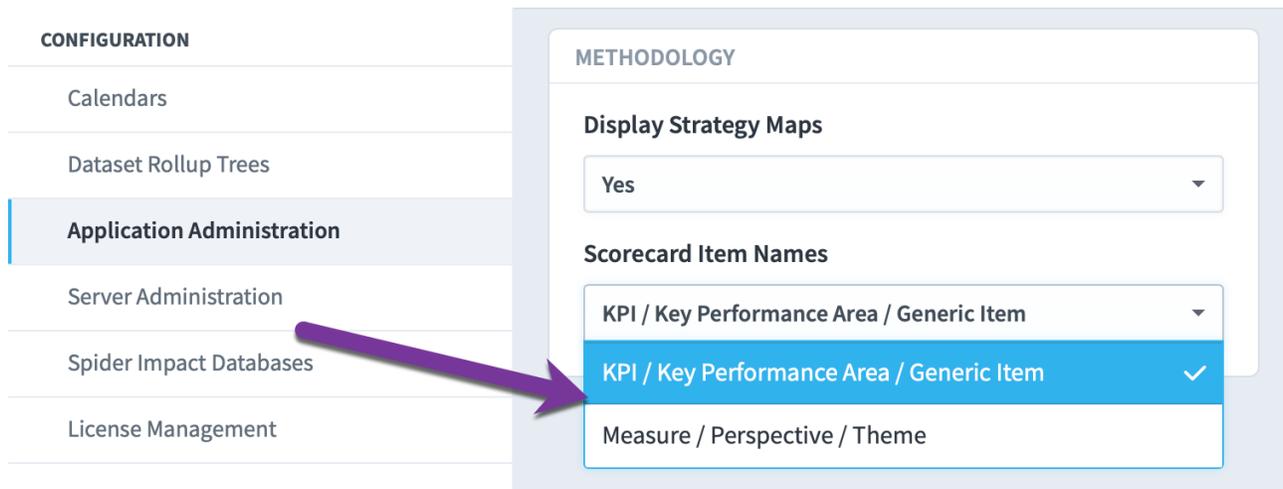
Application Administration

Choosing Methodology

Choosing Methodology Language

Spider Impact works great with any performance management methodology. To make getting started even easier, you can choose between popular methodology language right in the app

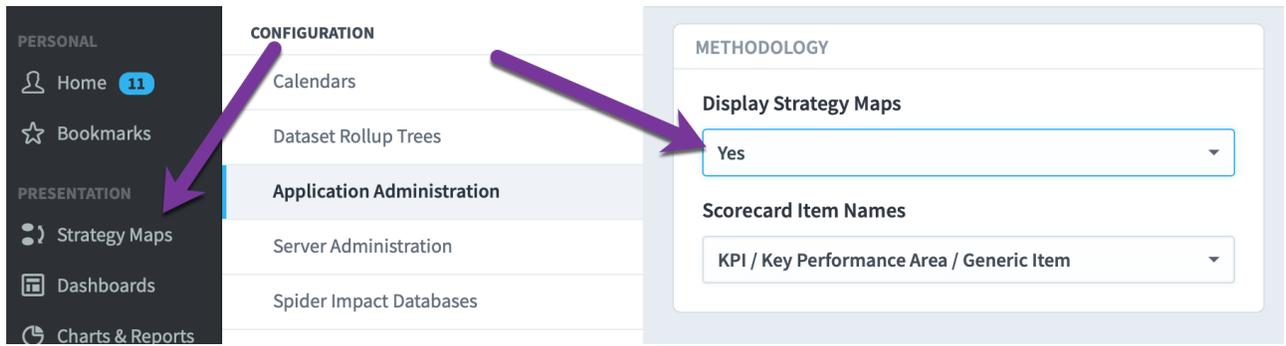
There's a new Methodology section in Application Administration where you can choose what language to use in Spider Impact. For scorecard item names you can choose between balanced scorecard language like *Measure, Perspective, and Theme*. Another option is KPI language like *KPI, Key Performance Area, and Generic Items*.



As always, you can further customize any language in the software with a custom language file. Please let us know if you need help setting that up.

Enabling and Disabling Strategy Maps

Strategy Maps are similar to Dashboards, but they're solely focused on showing your big-picture strategy. The Strategy Maps section is now available to all Spider Impact customers and can be enabled in Application Administration.



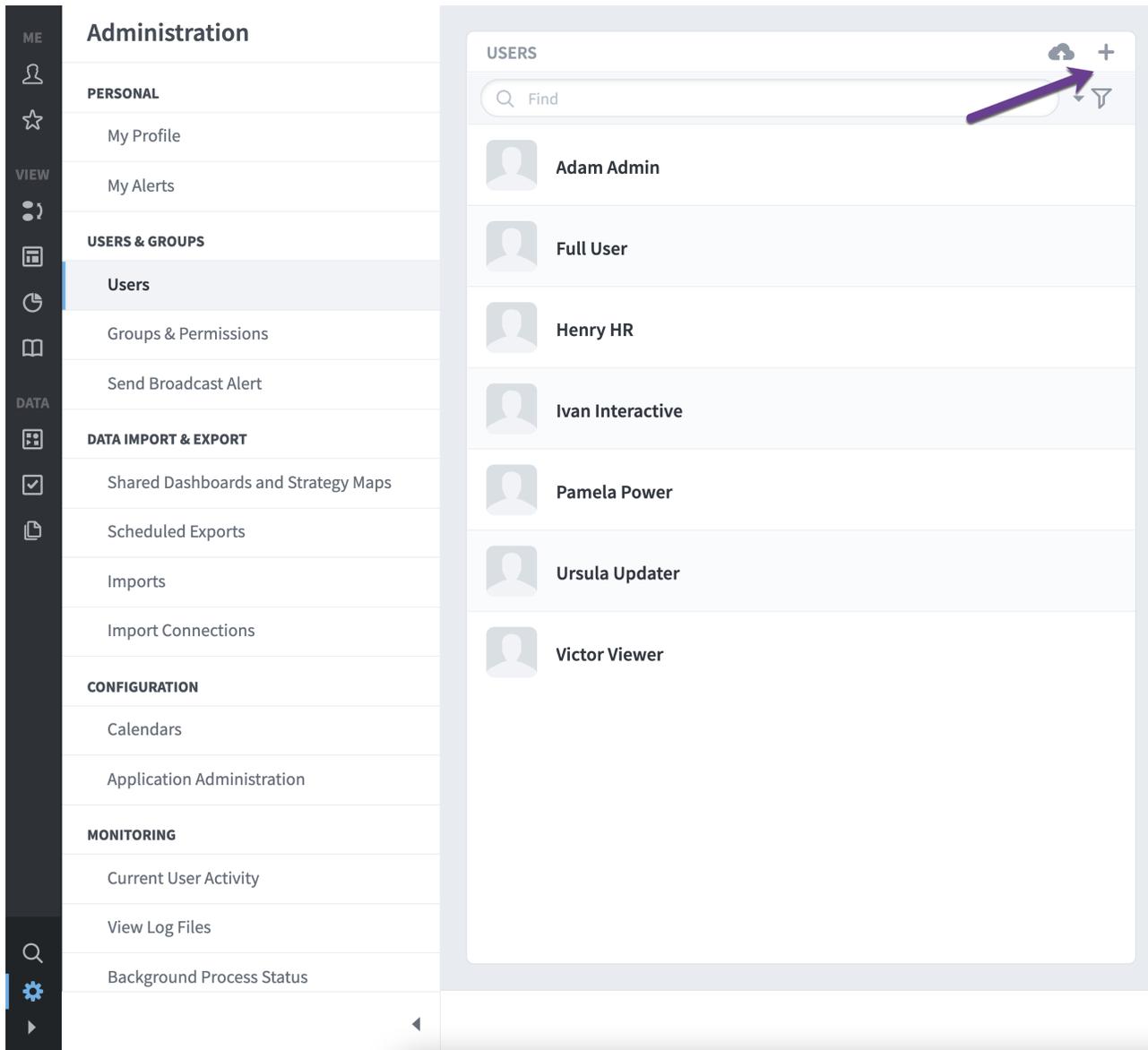
Users

Overview

Users are created and managed on the Admin > Users screen.

Adding Users

You can add a new user using the + button.



You can then enter a username, email address, first and last name, and password. You have the option of whether or not the user must change their password on initial login, and can assign the user as a member or admin of a group.

NEW USER



Username

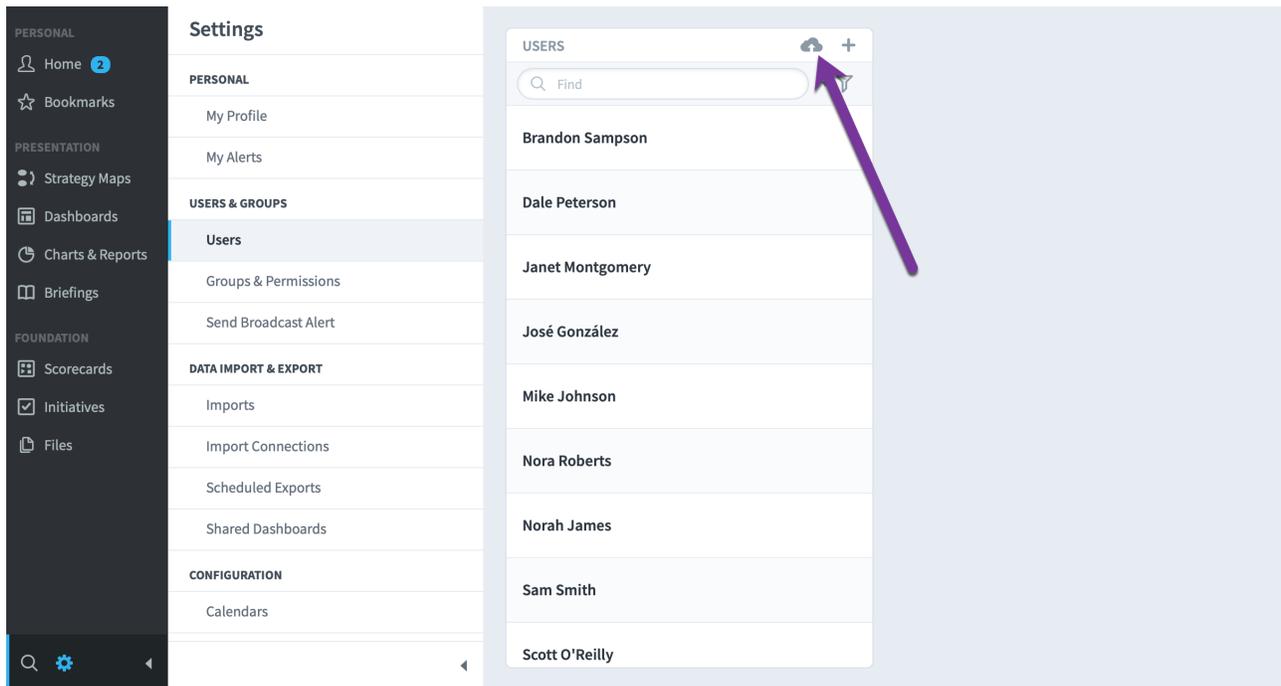
Email Address

First Name **Middle** **Last Name**

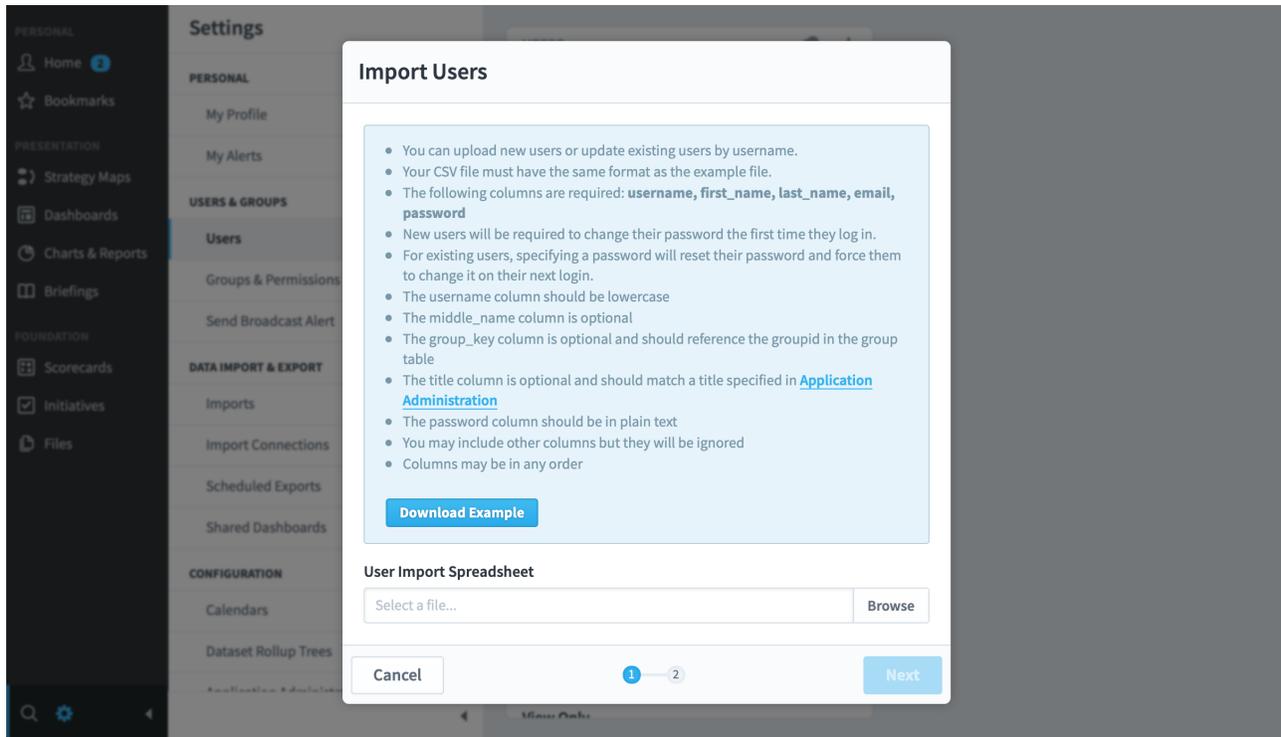
Password **Retype Password**

Importing Users

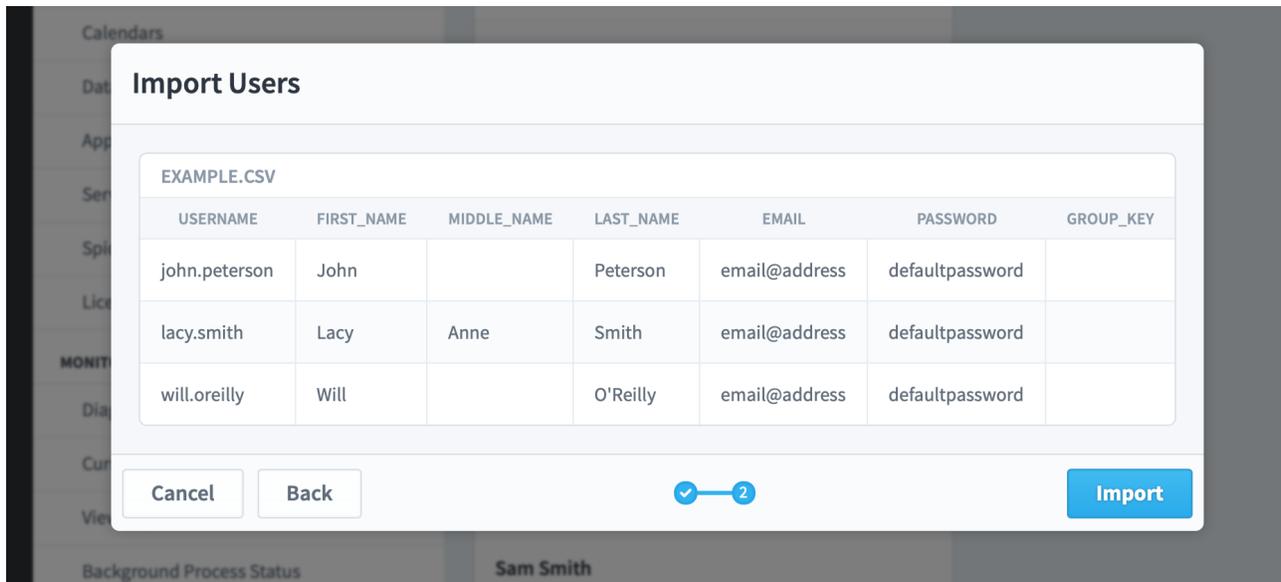
Rather than manually adding users one at a time, administrators can import multiple users at a time via spreadsheet. To start, just click on the "Import" button.



This brings up a dialog where you can upload your spreadsheet. It also has instructions on data format and an example file to download. You can build up a list of users to include their username, email address, first and last name, and password (the middle name, group_key, and title columns are optional). Once the file has been developed, you can import the users using the Browse button.

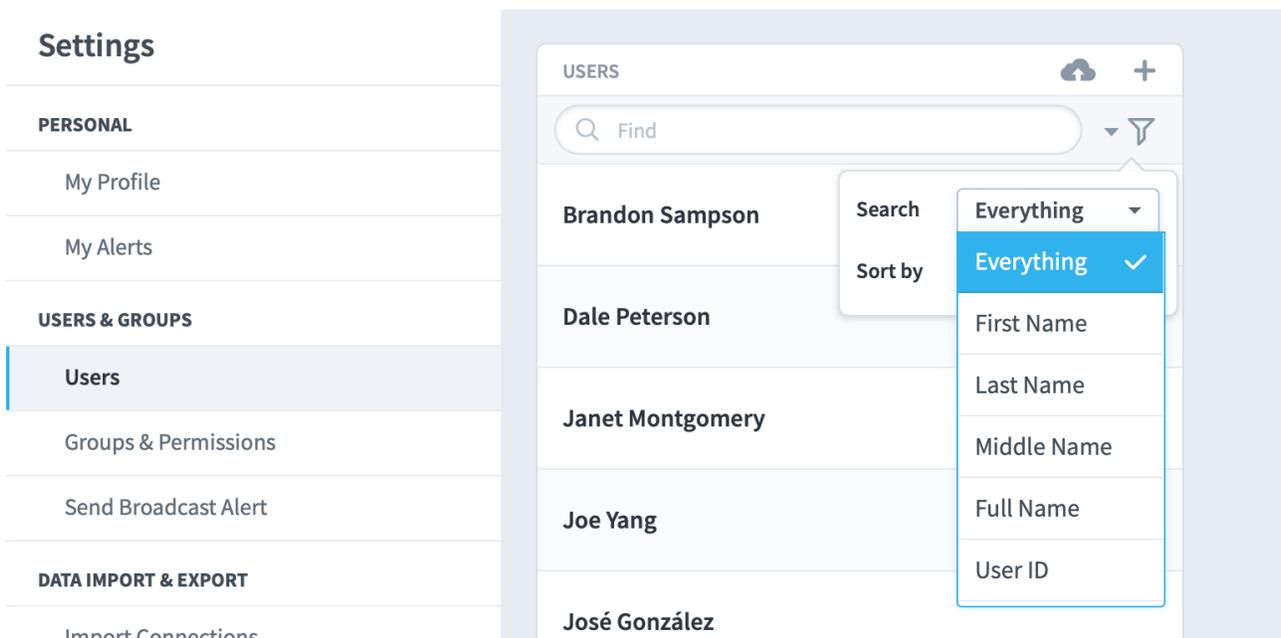


Before you run the import, you can preview your data and you will be alerted to any invalid fields. For existing users, specifying a password will reset it and force them to change it on their next login.



Searching Specific User Fields

Administrators can now choose which fields to search against when editing users. It defaults to Everything to match the previous functionality.



Permissions

User permissions [are defined within groups](#).

Groups

Overview

Groups are created and managed on the Admin > Groups & Permissions screen. Groups determine permissions within Spider Impact. Permissions applied to a group are granted to all of its members.

Creating Groups

You can create a new group using the + Add button.

The screenshot shows the 'Administration' sidebar on the left with 'Groups & Permissions' selected. The main content area displays the 'PERMISSIONS' panel, which includes a search bar and a list of user groups. A purple arrow points to the 'By Organization' filter option.

Group Name	Group Type	Count
Admin	POWER USERS	2
Human Resources	UPDATE USERS	2
Interactive Users	INTERACTIVE USERS	2
Power Users	POWER USERS	2
Update Users	UPDATE USERS	2
View Only	VIEW ONLY	2

You can then enter a name for the group, select a group type, apply Advanced and Organization permissions, add group members and group admins.

NEW GROUP

Name

Group Type

Permissions

Advanced Organization

MEMBERS (0)

Add member...

ADMINS (0)

Add admin...

Group Types

You can pick from four different group types. Once you pick a group type, permissions for the group can be set under Advanced.

Power Users

Power Users have the most permissions available to them. Administrators are typically set as power users and granted all permissions.

New Group: Advanced Permissions

[Select default](#) [Unselect all](#)

VIEW <input checked="" type="checkbox"/>	REPORTS <input type="checkbox"/>	OTHER <input checked="" type="checkbox"/>
View All Organizations <input checked="" type="checkbox"/>	Modify Reports <input checked="" type="checkbox"/>	Modify Scorecard and Initiative Notes <input checked="" type="checkbox"/>
Modify Bookmarks and Personal Settings <input checked="" type="checkbox"/>	Modify SQL Console Reports <input type="checkbox"/>	Modify Related Items <input checked="" type="checkbox"/>
Change Personal Profile <input checked="" type="checkbox"/>		
UPDATE KPIS <input checked="" type="checkbox"/>	BRIEFINGS <input checked="" type="checkbox"/>	ADMINISTRATION <input type="checkbox"/>
Update All Viewable KPI Actual Values <input checked="" type="checkbox"/>	Modify Briefings <input checked="" type="checkbox"/>	Create + Edit Users in Groups They Administer <input checked="" type="checkbox"/>
Update All Viewable Scoring Threshold Values <input checked="" type="checkbox"/>		Delete Users in Groups They Administer <input checked="" type="checkbox"/>
	SCORECARDS & ORGANIZATIONS <input checked="" type="checkbox"/>	Modify View Organization Permissions <input checked="" type="checkbox"/>
INITIATIVES <input checked="" type="checkbox"/>	Modify Organizations & Scorecard Items <input checked="" type="checkbox"/>	Modify All Scheduled Exports <input checked="" type="checkbox"/>
Edit Initiatives <input checked="" type="checkbox"/>	Modify Owners and Updaters <input checked="" type="checkbox"/>	Modify All Imports <input checked="" type="checkbox"/>
Update Initiative Status <input checked="" type="checkbox"/>	Modify Scorecard Overview <input checked="" type="checkbox"/>	Modify Import Connections <input type="checkbox"/>
Archive Initiatives <input checked="" type="checkbox"/>		
FILES <input checked="" type="checkbox"/>	DASHBOARDS & STRATEGY MAPS <input checked="" type="checkbox"/>	SUPER ADMINISTRATION <input type="checkbox"/>
Modify Files <input checked="" type="checkbox"/>	Modify Dashboards and Strategy Maps <input checked="" type="checkbox"/>	Modify Calendars <input checked="" type="checkbox"/>
	Modify All Shared Dashboards and Strategy Maps <input checked="" type="checkbox"/>	Administer All Groups <input type="checkbox"/>
		Administer Application <input checked="" type="checkbox"/>

Update Users

Update Users can own items, set bookmarks, update KPI actual values and thresholds, add notes, modify files, set alerts and create tasks.

New Group: Advanced Permissions

[Select default](#)

[Unselect all](#)

<input checked="" type="checkbox"/> VIEW <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> OTHER <input checked="" type="checkbox"/>
View All Organizations <input checked="" type="checkbox"/>	Modify Scorecard and Initiative Notes <input checked="" type="checkbox"/>
Modify Bookmarks and Personal Settings <input checked="" type="checkbox"/>	Modify Related Items <input checked="" type="checkbox"/>
Change Personal Profile <input checked="" type="checkbox"/>	
<input type="checkbox"/> UPDATE KPIS <input type="checkbox"/>	
Update All Viewable KPI Actual Values <input type="checkbox"/>	
Update All Viewable Scoring Threshold Values <input type="checkbox"/>	
<input checked="" type="checkbox"/> INITIATIVES <input checked="" type="checkbox"/>	
Edit Initiatives <input checked="" type="checkbox"/>	
Update Initiative Status <input checked="" type="checkbox"/>	
<input type="checkbox"/> FILES <input checked="" type="checkbox"/>	
Modify Files <input checked="" type="checkbox"/>	

Interactive Users

Interactive Users can set bookmarks, add notes and set alerts. Company executives are typically set as interactive users and granted the ability to see all organizations. They can review performance and comment on their findings.

New Group: Advanced Permissions

[Select default](#)

[Unselect all](#)

 VIEW <input checked="" type="checkbox"/>
View All Organizations <input checked="" type="checkbox"/>
Modify Bookmarks and Personal Settings <input checked="" type="checkbox"/>
Change Personal Profile <input checked="" type="checkbox"/>

 OTHER <input checked="" type="checkbox"/>
Modify Scorecard and Initiative Notes <input checked="" type="checkbox"/>

View Only

View Only users can only view things in Spider Impact.

New Group: Advanced Permissions

[Select default](#)

[Unselect all](#)

 VIEW <input checked="" type="checkbox"/>
View All Organizations <input checked="" type="checkbox"/>
Change Personal Profile <input checked="" type="checkbox"/>

Copying Groups

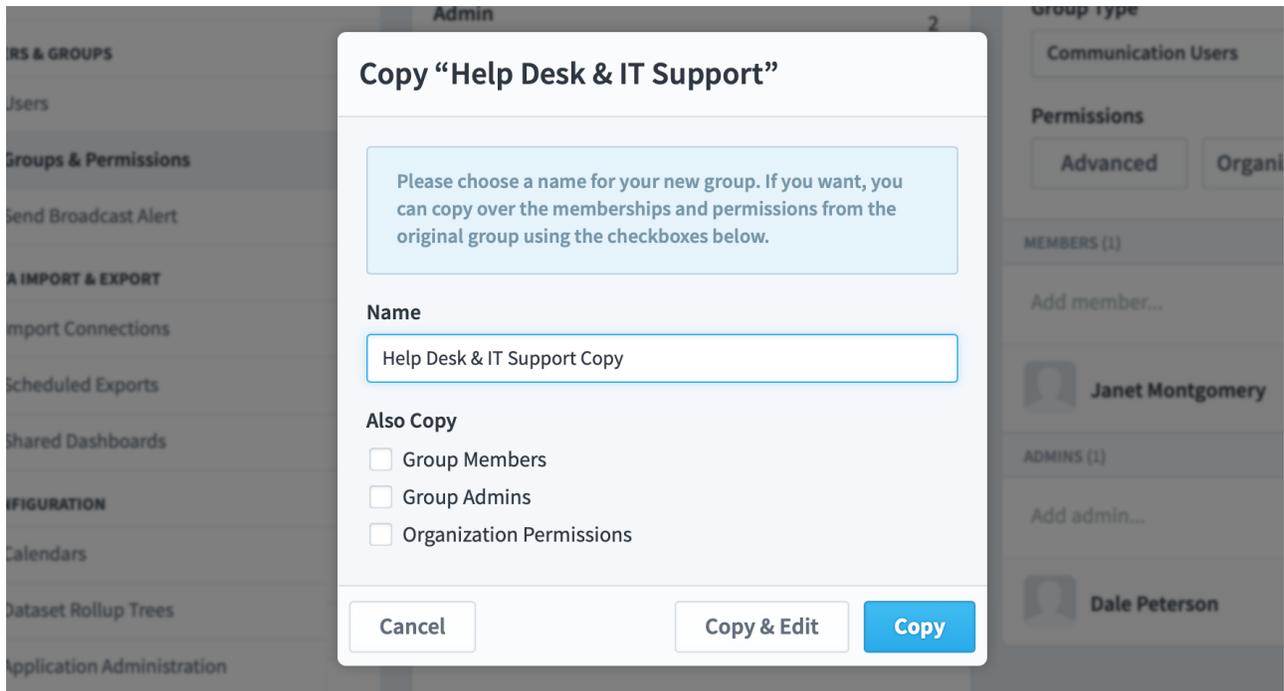
You can copy a group by selecting the group and selecting the Copy button.

The screenshot shows the 'Settings' interface with a modal window for editing the 'Help Desk & IT Support' group. The modal is divided into three main sections:

- PERMISSIONS:** A table with columns for group name, type, and count. The 'Help Desk & IT Support' group is selected and highlighted in blue. A purple arrow points to the 'Copy' button at the bottom of this section.
- HELP DESK & IT SUPPORT:** A configuration panel with fields for 'Name' (Help Desk & IT Support), 'Group Type' (Communication Users), and 'Permissions' (Advanced, Organizat..., Datasets).
- MEMBERS (1):** A list of members, including Mike Johnson and Janet Montgomery.

At the bottom of the modal, there are 'Copy' and 'Delete' buttons, along with 'Cancel' and 'Save' buttons.

You can then rename the group, and choose whether or not to copy the original group's members, admins, and organization permissions (Advanced permissions automatically carry-over).



Deleting Groups

You can delete a group by selecting the group and clicking the Delete button.

Administration

- ME
- PERSONAL
 - My Profile
 - My Alerts
- VIEW
- USERS & GROUPS
 - Users
 - Groups & Permissions**
 - Send Broadcast Alert
- DATA
 - DATA IMPORT & EXPORT
 - Shared Dashboards and Strategy Maps
 - Scheduled Exports
 - Imports
 - Import Connections
 - CONFIGURATION
 - Calendars
 - Application Administration
 - MONITORING
 - Current User Activity
 - View Log Files
 - Background Process Status

PERMISSIONS + Add

By Group | By Organization

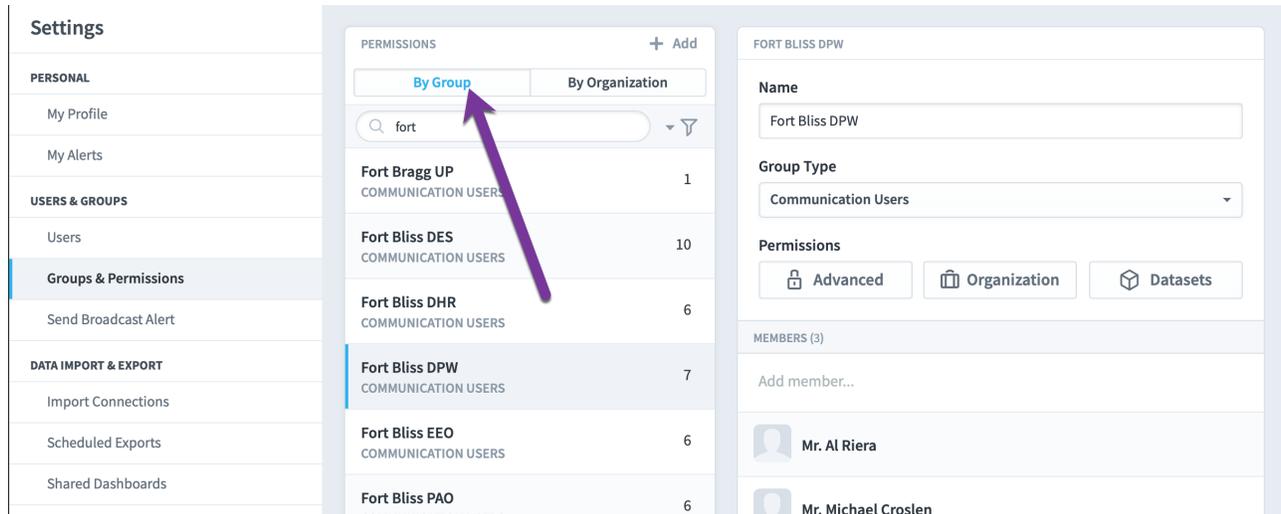
Find

	Admin POWER USERS	2
	Human Resources UPDATE USERS	2
	Interactive Users INTERACTIVE USERS	2
	Power Users POWER USERS	2
	Update Users UPDATE USERS	2
	View Only VIEW ONLY	2

Copy Delete

By Group vs. By Organization

You can edit a group by group or organization - the default view is "By Group".



The “By Organization” view allows administrators to see all groups who can view a particular organization. The idea here is that you can choose an organization and then see exactly who has permission to view it.

The top window on the right shows all of the groups that have “Direct Permissions” to the selected organization.

Settings

PERSONAL

- My Profile
- My Alerts

USERS & GROUPS

- Users
- Groups & Permissions**
- Send Broadcast Alert

DATA IMPORT & EXPORT

- Import Connections
- Scheduled Exports
- Shared Dashboards

CONFIGURATION

- Calendars

PERMISSIONS

By Group | **By Organization**

SMS Project [Find]

- Army Enterprise
 - Army Organizations
 - User Workspace
 - 1st Armored Division Artillery
 - III Corps (Fort Hood)**
 - 13th ESC
 - HHBN
 - 2nd Infantry Division
 - 3rd Infantry Division
 - 4th Infantry Division
 - 5th Armored Brigade
 - 7th Infantry Division

DIRECT PERMISSION (2)

III Corps (Fort Hood) Updaters (Communication Users)

CASCADE PERMISSIONS
Yes

MEMBERS (1)
CPT James E. Palidar

ADMINS (1)
CPT James E. Palidar

III Corps (Fort Hood) Local Administrators (Local Administrators)

CASCADE PERMISSIONS
Yes

MEMBERS (1)
CPT James E. Palidar

ADMINS (0)
None

CASCADING PERMISSION (2)

CAN VIEW ALL ORGANIZATIONS (2)

Administrators can also expand the “Cascading Permissions” box to see the groups who can see the selected organization based on permission to a higher-level organization.

Settings

PERSONAL

- My Profile
- My Alerts

USERS & GROUPS

- Users
- Groups & Permissions**
- Send Broadcast Alert

DATA IMPORT & EXPORT

- Import Connections
- Scheduled Exports
- Shared Dashboards

CONFIGURATION

- Calendars
- Application Administration

MONITORING

- Current User Activity
- View Log Files
- Background Process Status

ADVANCED

- Tree Fixer

PERMISSIONS

By Group | **By Organization**

SMS Project

- Army Enterprise
- Army Organizations
- User Workspace
 - 1st Armored Division Artillery
 - III Corps (Fort Hood)**
 - 13th Cavalry
 - HHBN
 - 2nd Infantry Division
 - 3rd Infantry Division
 - 4th Infantry Division
 - 5th Armored Brigade
 - 7th Infantry Division
 - 2ID DIVARTY (JBLM)
 - 2ID DIVARTY HQ
 - 8th Army
 - 9th Mission Support Command
 - 11th Armd Cav Regt RSO
 - 21st Signal Brigade Ft. Detrick
 - 25th Infantry Division

DIRECT PERMISSION (2)

III Corps (Fort Hood) Updaters (Communication Users)

CASCADE PERMISSIONS
Yes

MEMBERS (1)
CPT James E. Palidar

ADMINS (1)
CPT James E. Palidar

III Corps (Fort Hood) Local Administrators (Local Administrators)

CASCADE PERMISSIONS
Yes

MEMBERS (1)
CPT James E. Palidar

ADMINS (0)
None

CASCADING PERMISSION (2)

SHARP-SMS Administrator (Local Administrators)

MEMBERS (3)
Mr. Jason B. McKim, Mr. Anthony Middleton, Mr. Jordan T. Owens

ADMINS (2)
Mr. Jason B. McKim, Ms. Rose V. Holbrook

User Workspace Updaters (Communication Users)

MEMBERS (1)
Ms. Mary J. Dotson

ADMINS (0)
None

Similarly, administrators can also expand the “Can View All Organizations” box to see who can view the organization based on global permissions.

Settings

- PERSONAL
 - My Profile
 - My Alerts
- USERS & GROUPS
 - Users
 - Groups & Permissions**
 - Send Broadcast Alert
- DATA IMPORT & EXPORT
 - Import Connections
 - Scheduled Exports
 - Shared Dashboards
- CONFIGURATION
 - Calendars
 - Application Administration
- MONITORING
 - Current User Activity
 - View Log Files
 - Background Process Status
- ADVANCED
 - Tree Fixer
 - SQL Console

PERMISSIONS

- By Group | **By Organization**
- SMS Project
- Army Enterprise
 - Army Organizations
 - User Workspace
 - 1st Armored Division Artillery
 - III Corps (Fort Hood)
 - 13th ESC
 - HHBN
 - 2nd Infantry Division
 - 3rd Infantry Division
 - 4th Infantry Division
 - 5th Armored Brigade
 - 7th Infantry Division
 - 2ID DIVARTY (JBLM)
 - 2ID DIVARTY HQ
 - 8th Army
 - 9th Mission Support Command
 - 11th Armd Cav Regt RSO
 - 21st Signal Brigade Ft. Detrick
 - 25th Infantry Division
 - 62nd Medical BDE
 - 81st Readiness Division
 - 81st RD (Franklin)
 - (81st RD) Ariel Rosario Training node
 - 88th Readiness Division

DIRECT PERMISSION (2)

- III Corps (Fort Hood) Updaters (Communication Users)**
 - CASCADE PERMISSIONS: Yes
 - MEMBERS (1): CPT James E. Palidar
 - ADMINS (1): CPT James E. Palidar
- III Corps (Fort Hood) Local Administrators (Local Administrators)**
 - CASCADE PERMISSIONS: Yes
 - MEMBERS (1): CPT James E. Palidar
 - ADMINS (0): None

CASCADING PERMISSION (2)

- CAN VIEW ALL ORGANIZATIONS (2)**
 - SMS System Admins (Power Users)**
 - MEMBERS (8): Mr. Jason B. McKim, Mr. Scott T. O'Reilly, Mr. Matthew Sgarlata, Ms. Rose V. Holbrook, Tom Kuo, Jeffrey K. True, Mr. Michael C. Buckley, SSG Brian M. Riddle
 - ADMINS (2): Mr. Conor D. Crimmins (SMS Admin), Mr. Michael C. Buckley
 - SMS Administrators (Power Users)**
 - MEMBERS (22): Mr. Hank Scharpenberg, Mr. Jason B. McKim, Mr. Scott T. O'Reilly, Mr. Brandon Jennings, Mr. Matthew Sgarlata, Mr. Lester M. Felton III, Ms. Kathy Callahan, Mr. Mel J. Girardin, Dr. Dean R. Palmer (ALL-IMCOM PAR POC), Mr. Jim Challenger, Ms. Rose V. Holbrook, SMS Database, Mr. George A. Abbott, Ms. Giovanna Q. Wine, Mr. Barry K. Holder, Tom Kuo, Jeffrey K. True, Mr. Chester W. Hoch, Mr. Dave J. Miller, Mr. Jordan T. Owens, MAJ Kurt L. Gerfen, Jeremy Wenisch
 - ADMINS (13): Mr. Hank Scharpenberg, Mr. Scott T. O'Reilly, Mr. Brandon Jennings, Mr. Matthew Sgarlata, Mr. Lester M. Felton III, Ms. Kathy Callahan, Mr. Mel J. Girardin, Mr. Jim Challenger, Ms. Rose V. Holbrook, Mr. George A. Abbott, Ms. Giovanna Q. Wine, Mr. Chester W. Hoch, Mr. Dave J. Miller

