



**Spider
Strategies**

Getting Started in Spider Impact™

**Spider Impact 5.7 Quick Start Guide
Updated November 23rd, 2024**

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Your success is important to us!

Spider Impact is industry-leading performance management software that powers data visualization, balanced scorecards, team alignment, business intelligence, 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.

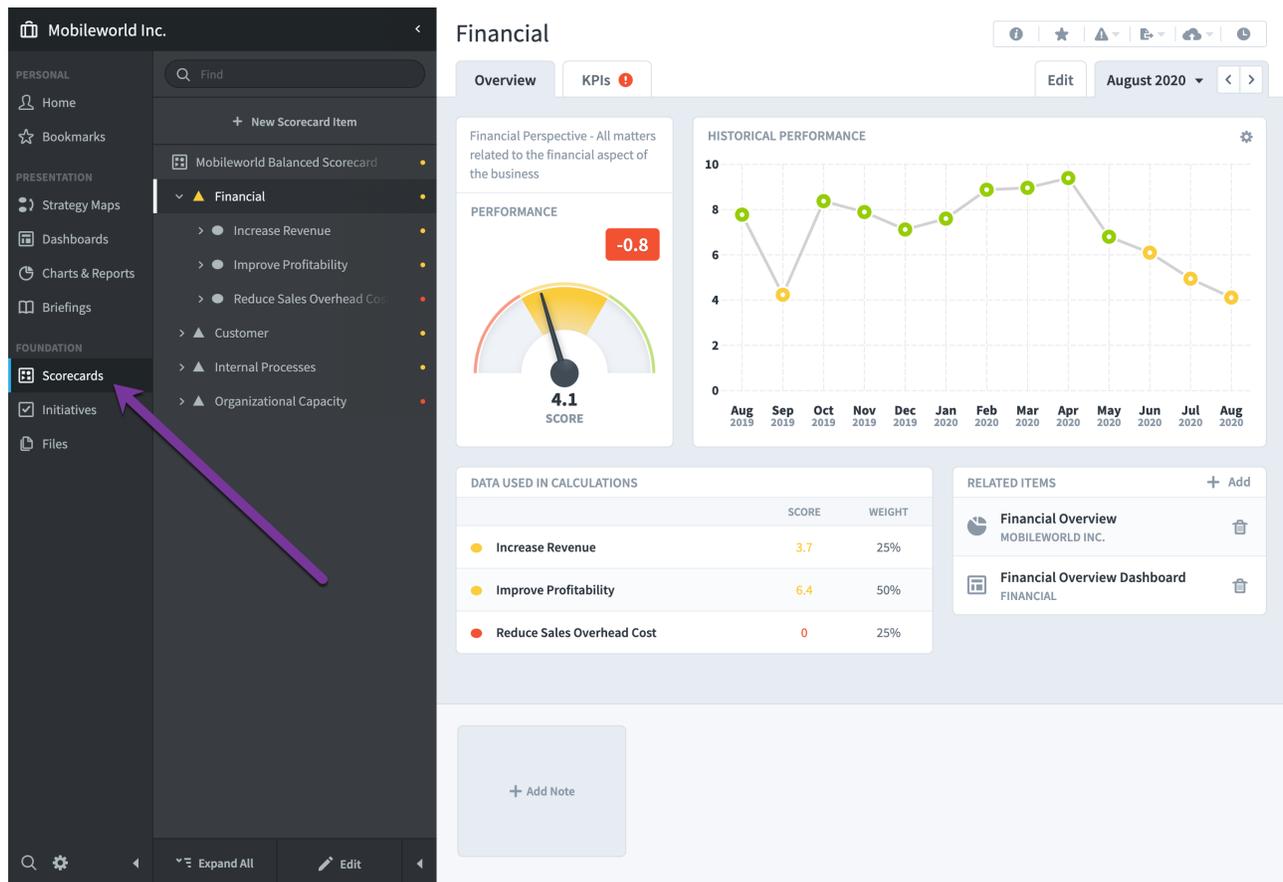
If you want to maximize your return on investment, we offer paid formal training courses and dedicated consulting engagements. Most of our customers prefer the flexibility of contracting for remote (web-based) assistance, but we also have on-site services available if they're a better match for your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

Scorecards

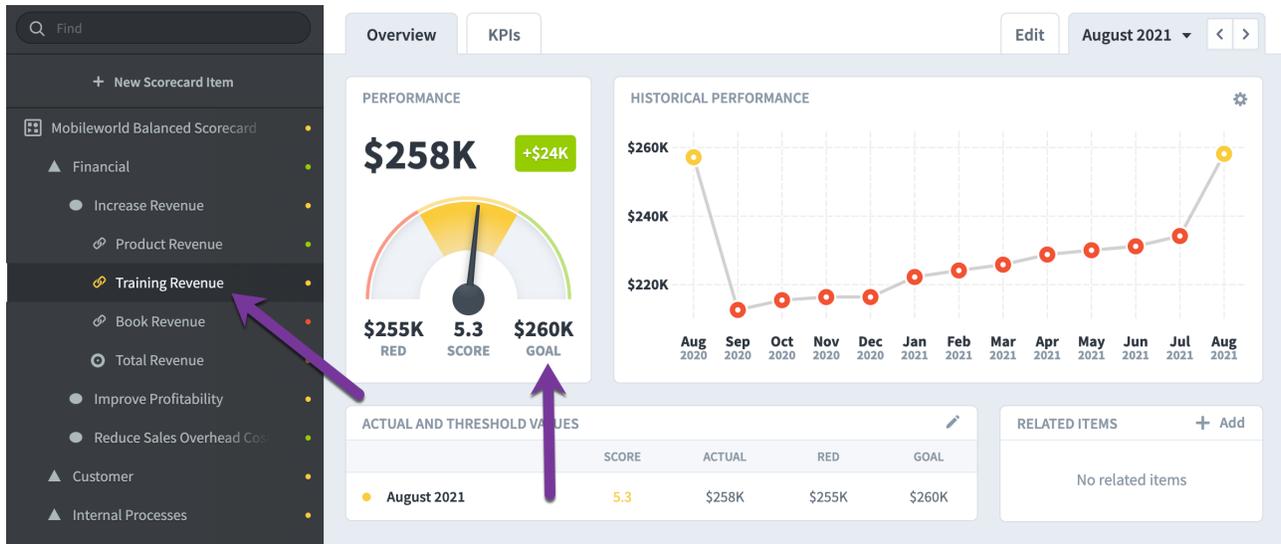
Overview of Scorecards

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.

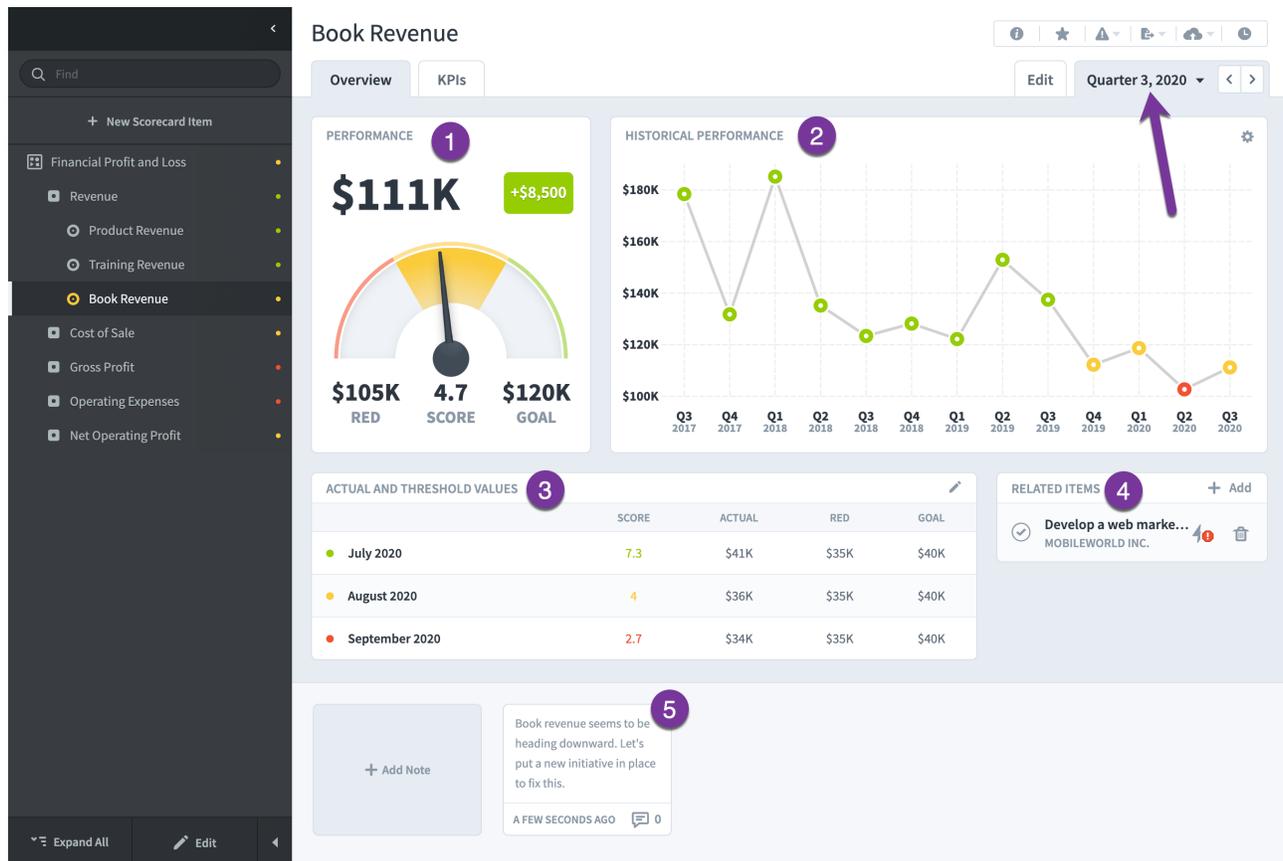


All of those KPI scores are then rolled up the tree to give scores to your higher-level strategic scorecard items. In this example, the score from this *Training Revenue* KPI is combined with other similar KPI scores to give the *Increase Revenue* objective a score. That objective score is then rolled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

For more information about how Spider Impact calculates scores, see the [How Scores are Calculated](#) article.

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.

There settings in Application Administration that allow you to configure the default appearance of the Scorecards Overview tab.

SCORECARDS OVERVIEW APPEARANCE

Show Description

Yes ▼

Chart Data Series Type

Bar ▼

Chart Background Thresholds

No ▼

Chart Range

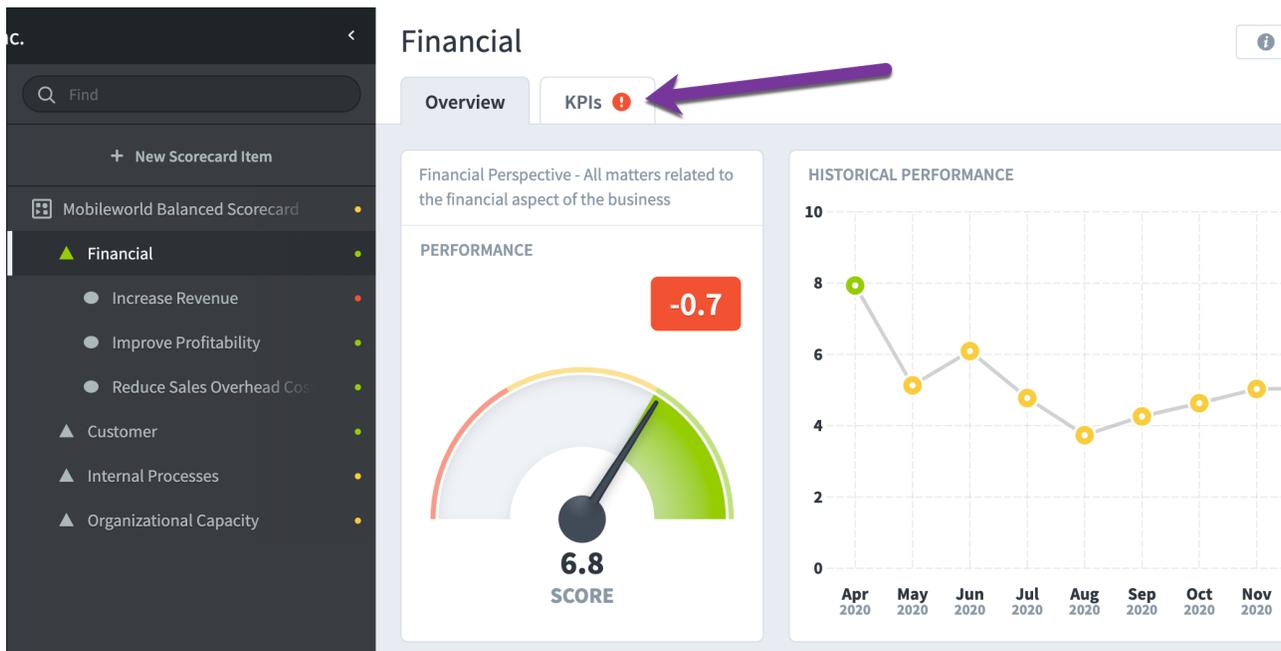
13 Periods Earlier ▼ TO Current Period ▼

In this example we've set the description to show, and we're charting 4 periods on a bar chart with no background thresholds.



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.

The screenshot displays the 'Financial' dashboard for Mobileworld Inc. The 'KPIs' tab is active, showing a table of performance metrics. A purple arrow points to the 'KPIs' tab, and another points to the 'Financial' category in the sidebar. A tooltip shows the 2021 total for Book Revenue as \$218,700.

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	\$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

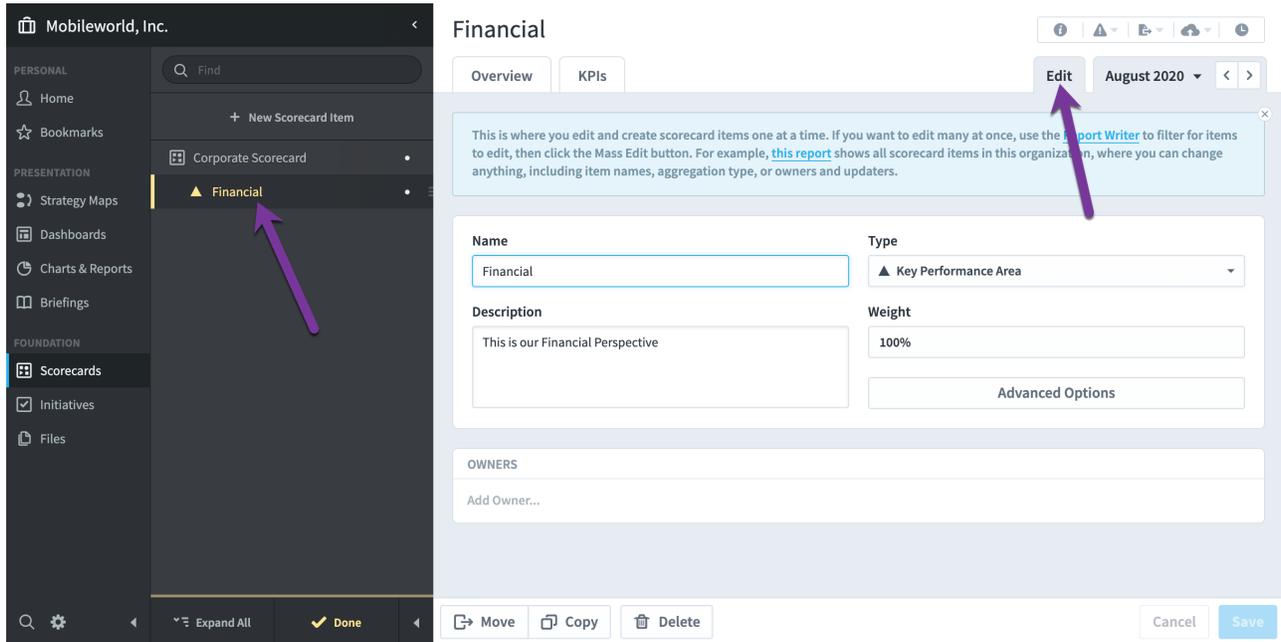
By default, any KPI below a score of 3.3 will trigger the red icon, but you can configure or disable this threshold in the Scorecards panel of Application Administration.

The screenshot shows the 'Application Administration' panel with the 'Threshold For Red Indicator On KPIs Tab (Blank Is No Indicator)' set to 3.3.

Scorecard Building Basics

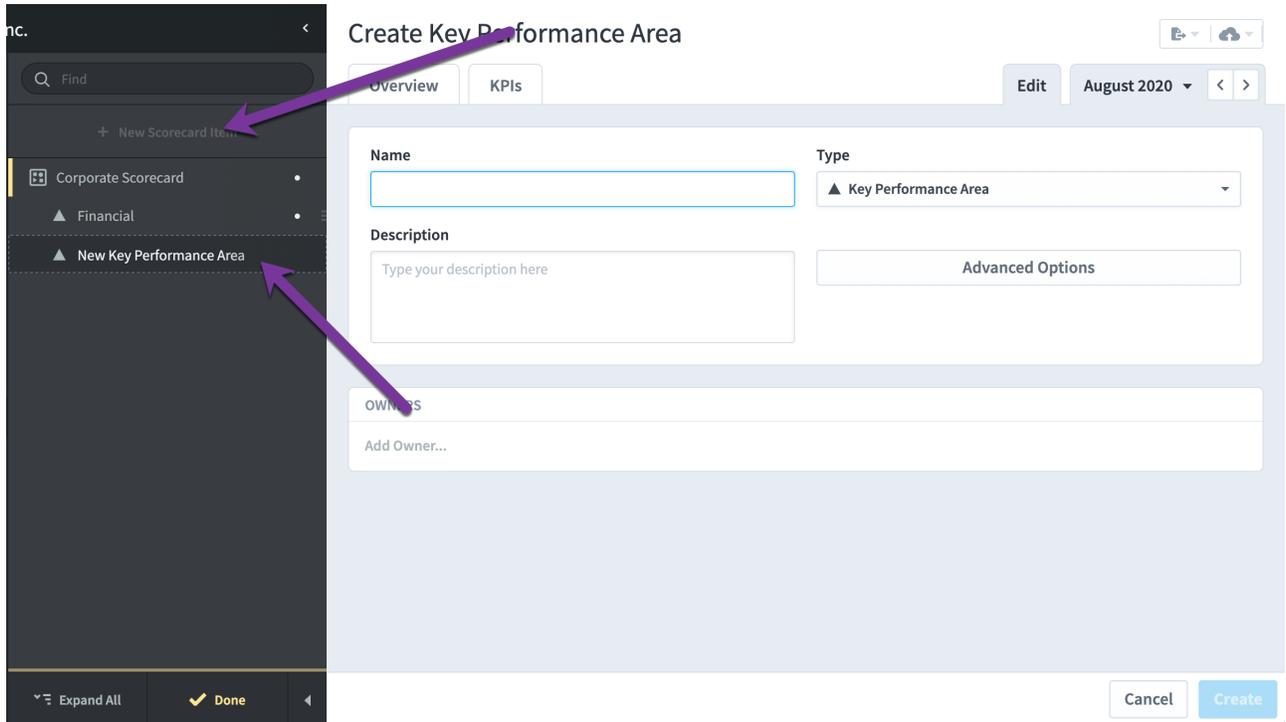
Editing Scorecard Items

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

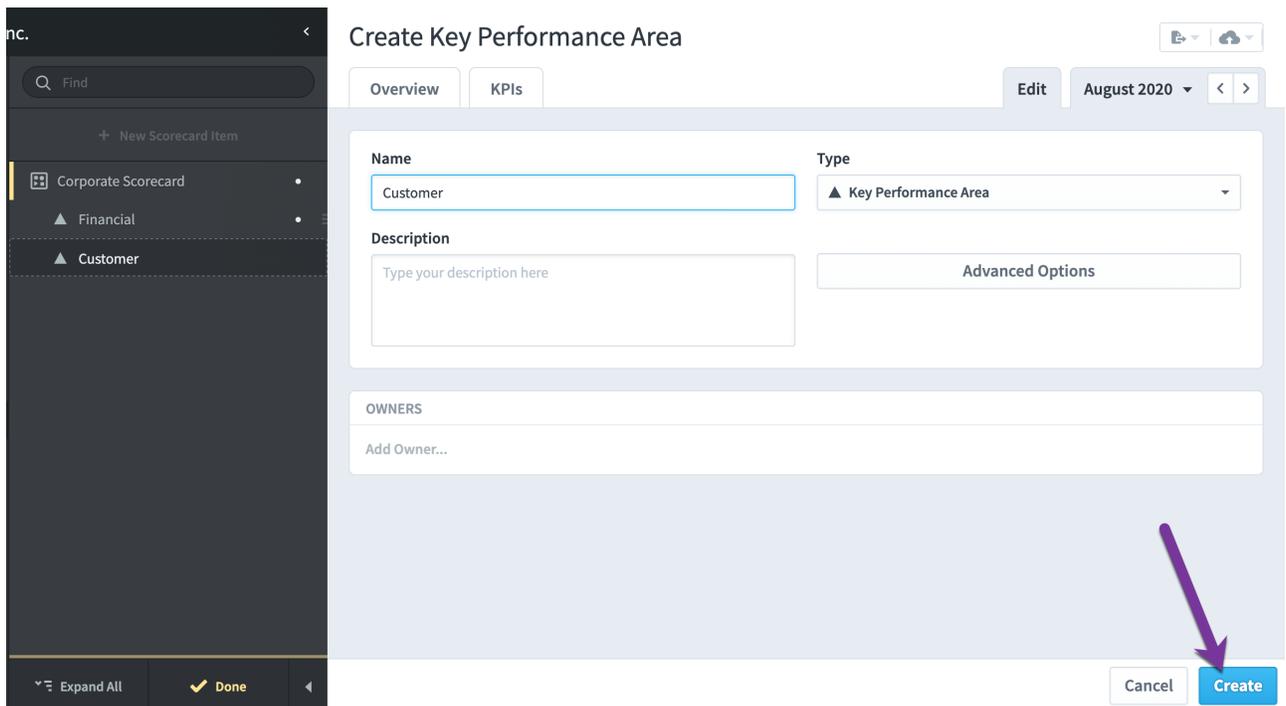


Creating New Scorecard Items

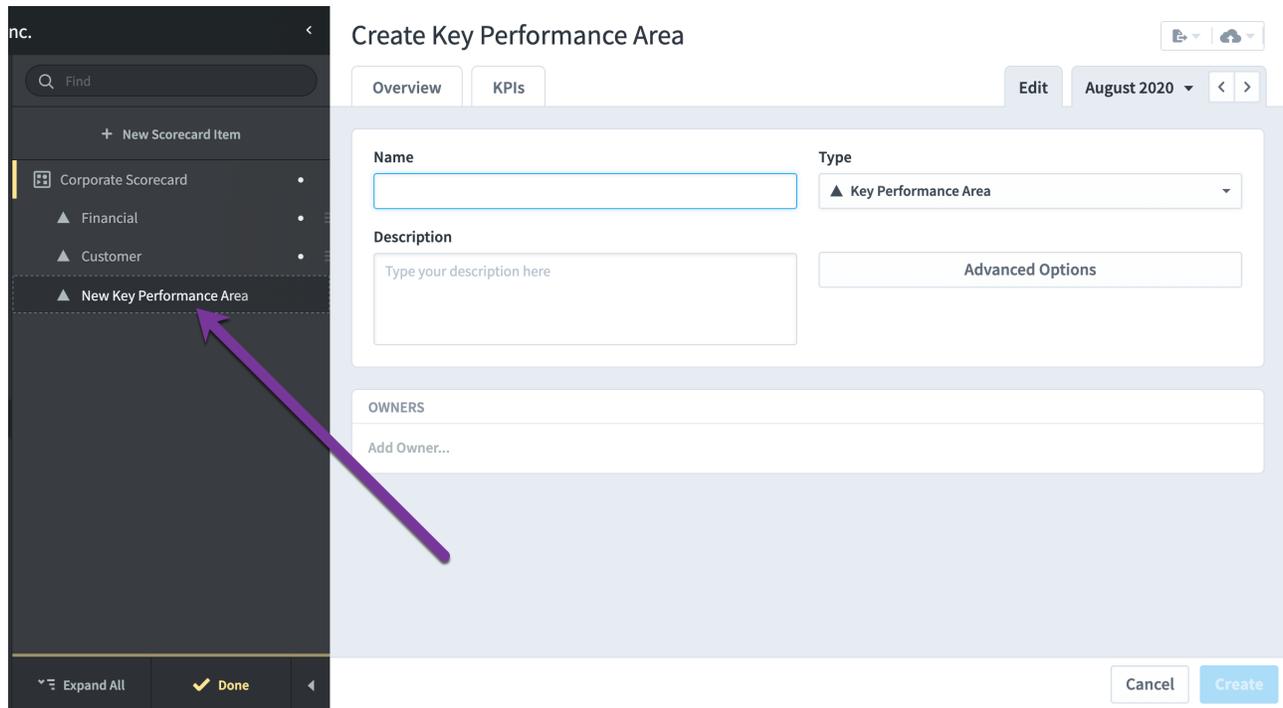
To create a new scorecard item, select its parent in the tree and click the New Scorecard Item button. This will put a placeholder for the new item in the tree and you can start filling out the form.



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



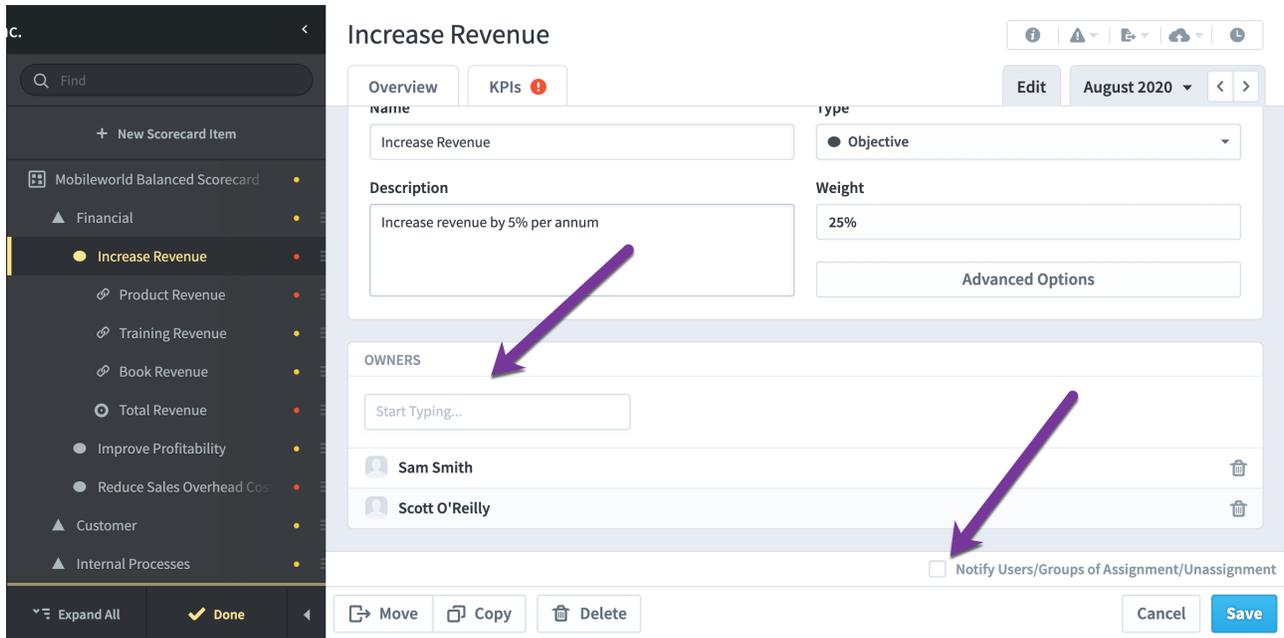
Not only does this save your scorecard item, but it also automatically moves on to creating the next scorecard item in the list.



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.

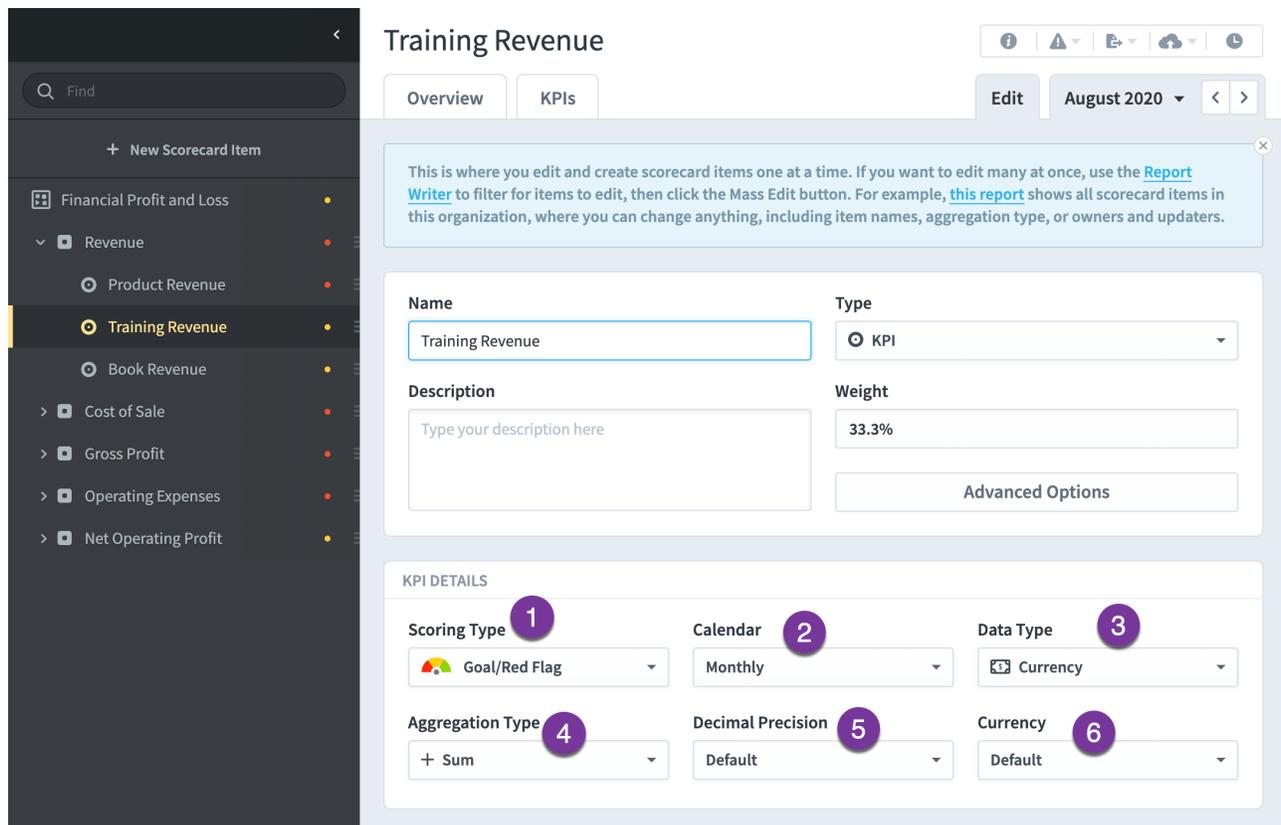
The screenshot shows a dashboard interface. On the left is a dark sidebar with navigation categories: PERSONAL (Home, Bookmarks), PRESENTATION (Strategy Maps, Dashboards, Charts & Reports, Briefings), and FOUNDATION (Scorecards, Initiatives, Files). The main content area is titled 'Home' and includes a 'Welcome' message, 'Alerts 1', 'KPI Updates', 'My KPIs', and 'My Tasks'. The 'My KPIs' section features three summary cards: '5 KPIs' (green), '1 KPI' (yellow), and '4 KPIs' (red). Below these is a table titled 'MY KPIS' with columns for KPI NAME, PERIOD, SCORE, and ACTUAL. The table is divided into three sections: CUSTOMER SUPPORT, FINANCIAL, and others.

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.



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 [Using 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
Goal/Red Flag	Monthly	# Number
Aggregation Type	Decimal Precision	Units
Average	Default	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
Manual	Manual	Manual
	255,000	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.

UPDATERS	UPDATE THRESHOLDS
Add Updater...	
 Scott O'Reilly	<input type="checkbox"/> 

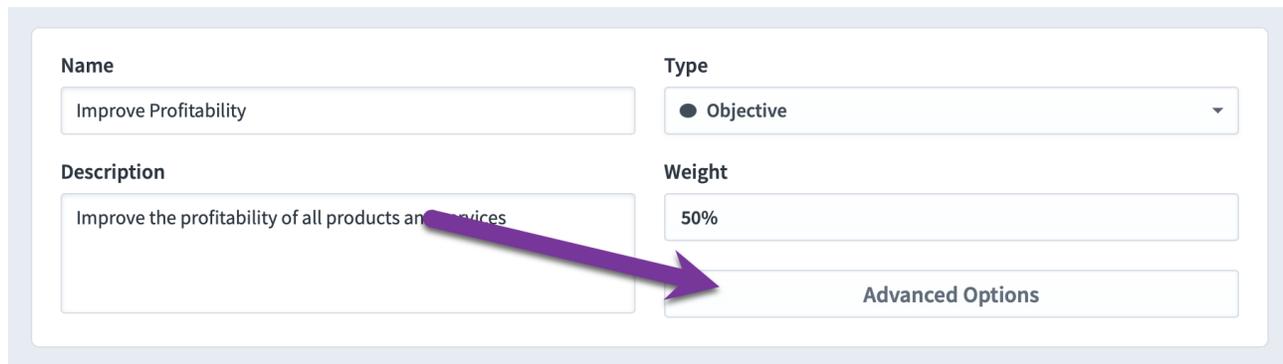
Weight

By default all scorecard items are weighted equally for scoring. You can adjust these weights to reflect different priorities, which is covered in the [Score Weighting](#) article.

Name Improve Profitability	Type ● Objective
Description Improve the profitability of all products and services	Weight 50%
Advanced Options	

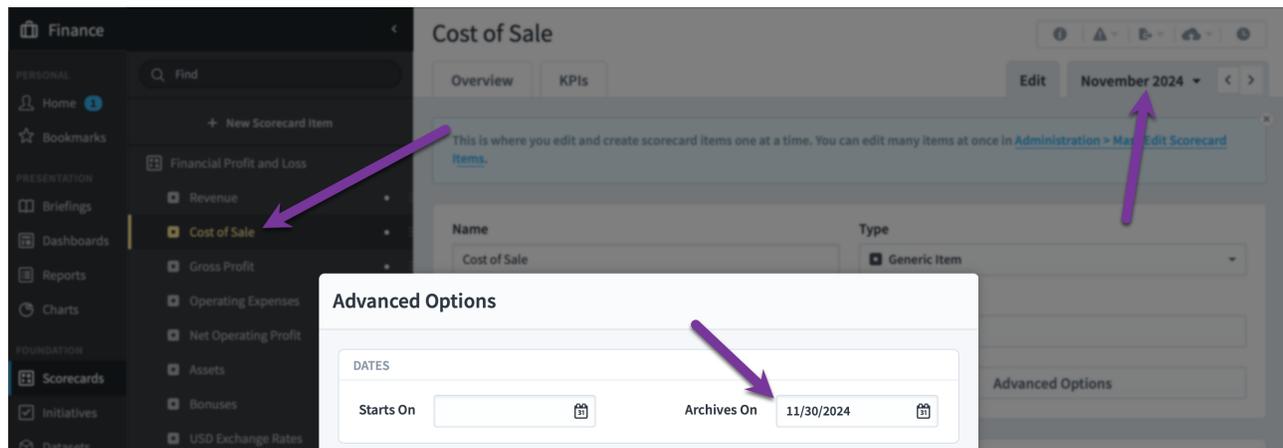
Start and Archive Dates

To set Start or Archive dates, click on a scorecard item's Advanced Options button.



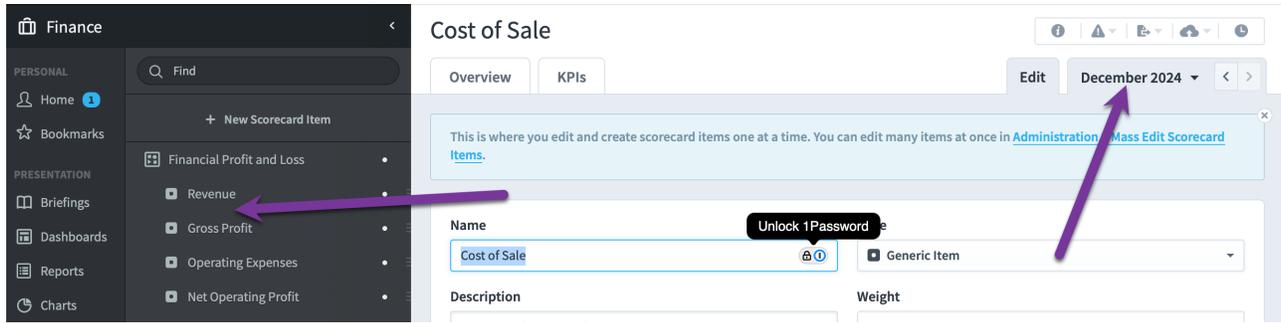
The screenshot shows a configuration form for a scorecard item. It includes fields for Name (Improve Profitability), Type (Objective), Description (Improve the profitability of all products and services), and Weight (50%). A purple arrow points from the Description field to the Advanced Options button at the bottom right.

By default, scorecard items appear for all time. In this example, however, we've set the Cost of Sale scorecard item to archive at the end of November 2024. As you can see, it still appears in the tree in November.

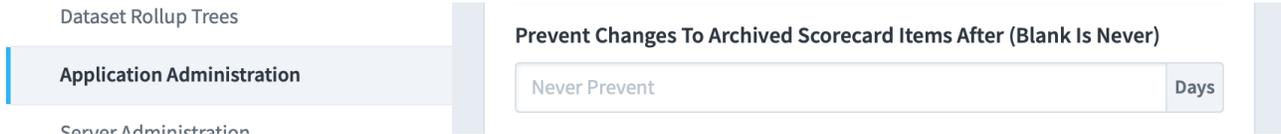


The screenshot shows the Spider Impact interface. On the left, a navigation menu highlights 'Cost of Sale' under 'Scorecards'. The main area shows the 'Cost of Sale' scorecard item with a date dropdown set to 'November 2024'. A purple arrow points to the 'Advanced Options' button. A dialog box titled 'Advanced Options' is open, showing 'Starts On' and 'Archives On' fields. The 'Archives On' field is set to '11/30/2024' and has a purple arrow pointing to it.

But, when we switch to December, it no longer appears. These start and archive dates allow your scorecards to change over time while still maintaining an accurate performance history.

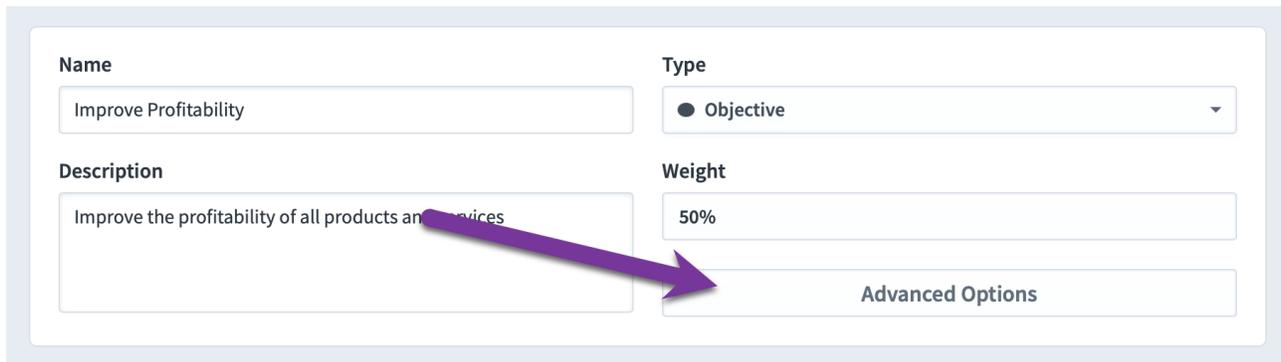


If you want to lock in archived scorecard items so they can't be changed after they're archived, there is a setting in the Scorecards pane of Application Administration.

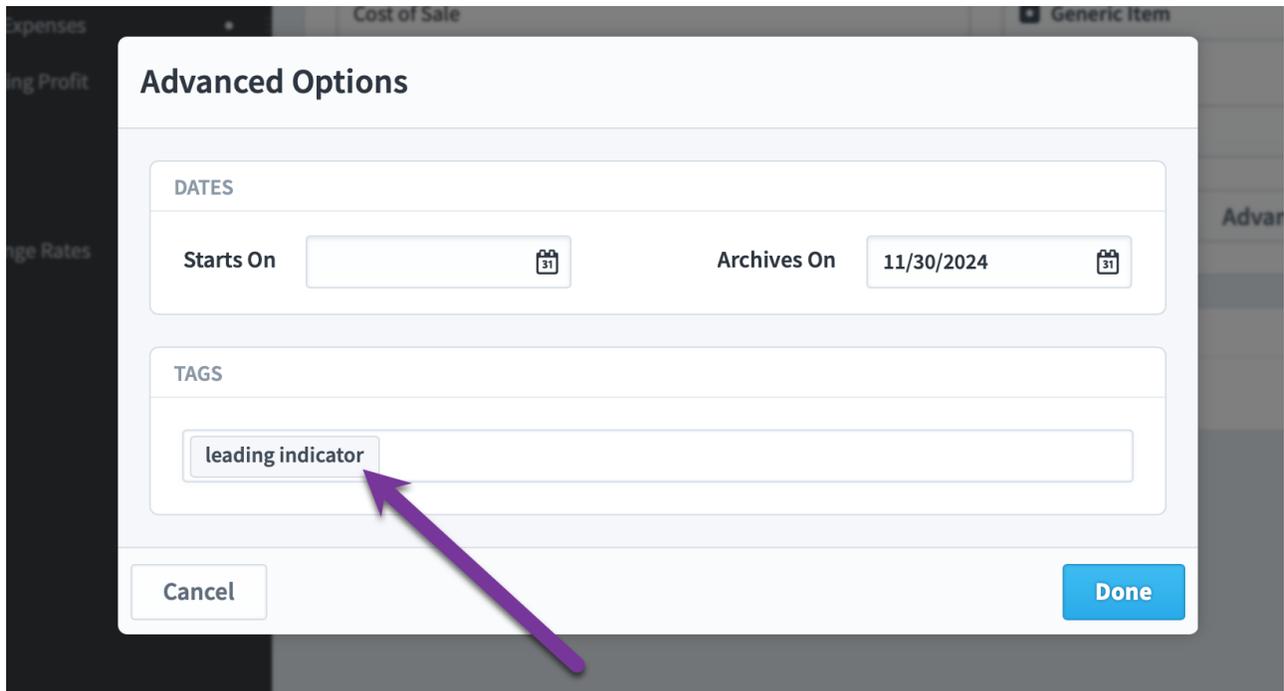


Tags

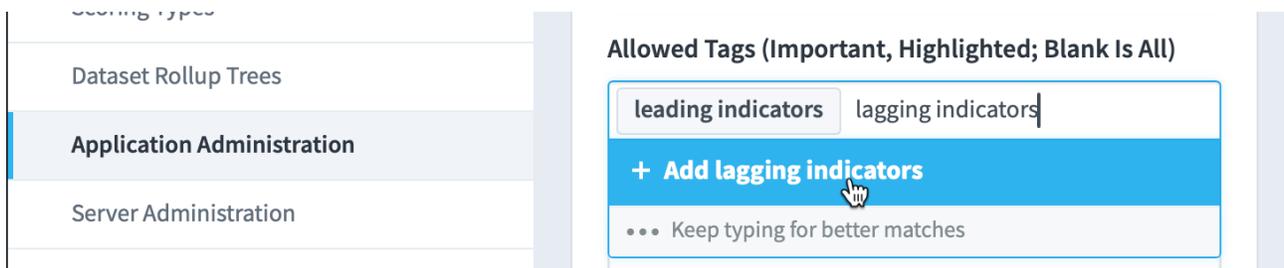
To set tags, click on a scorecard item's Advanced Options button.



Here you can tag scorecard items with attributes that you can report on. In this example we're designating some KPIs as leading indicators so that we can write a report showing all red leading indicators.

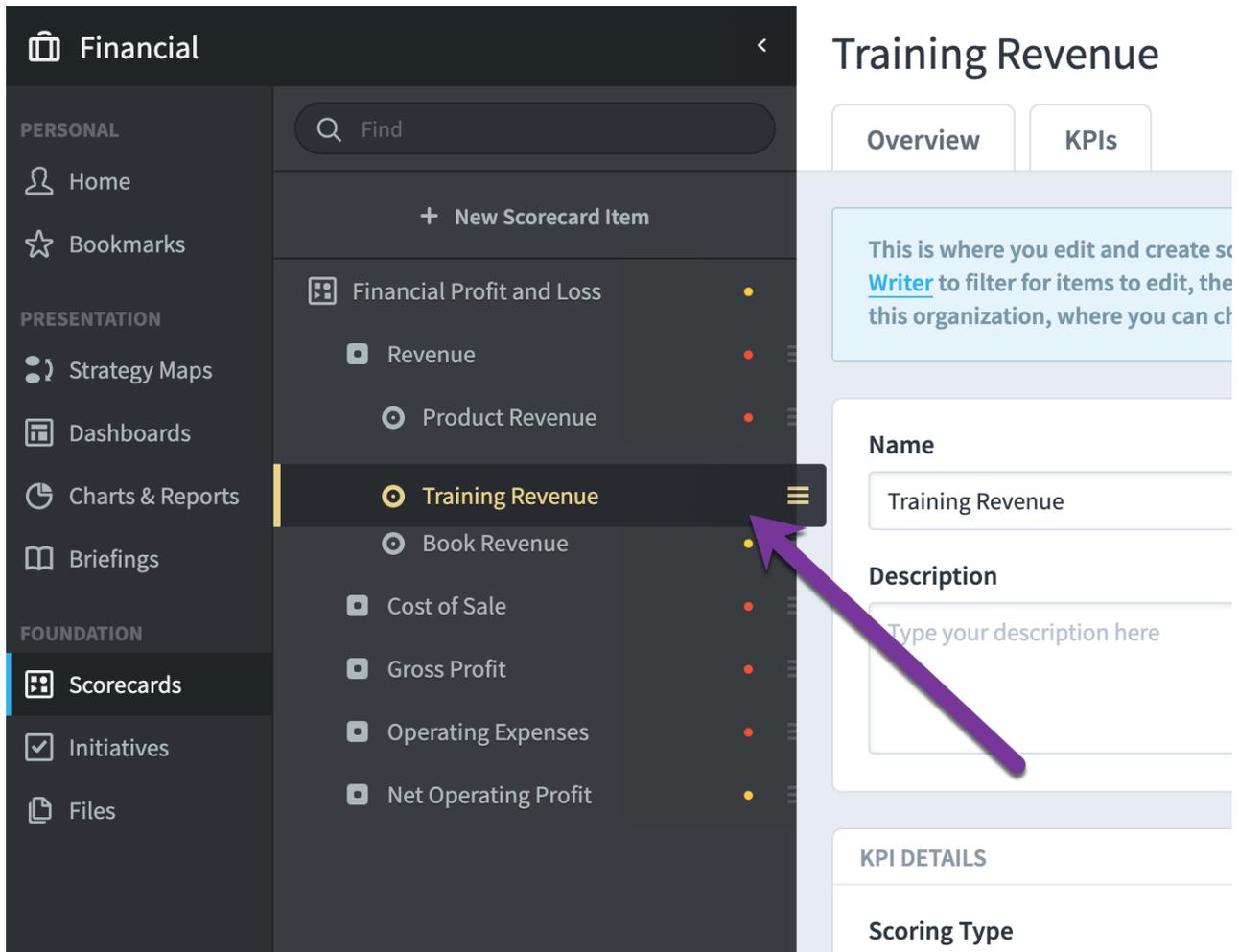


If you want to restrict the tags that people are able to use, you can define them in the Data Format panel in Application Administration.



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
Total Costs

Type
KPI

Description

Weight
25%

Advanced Options

KPI DETAILS

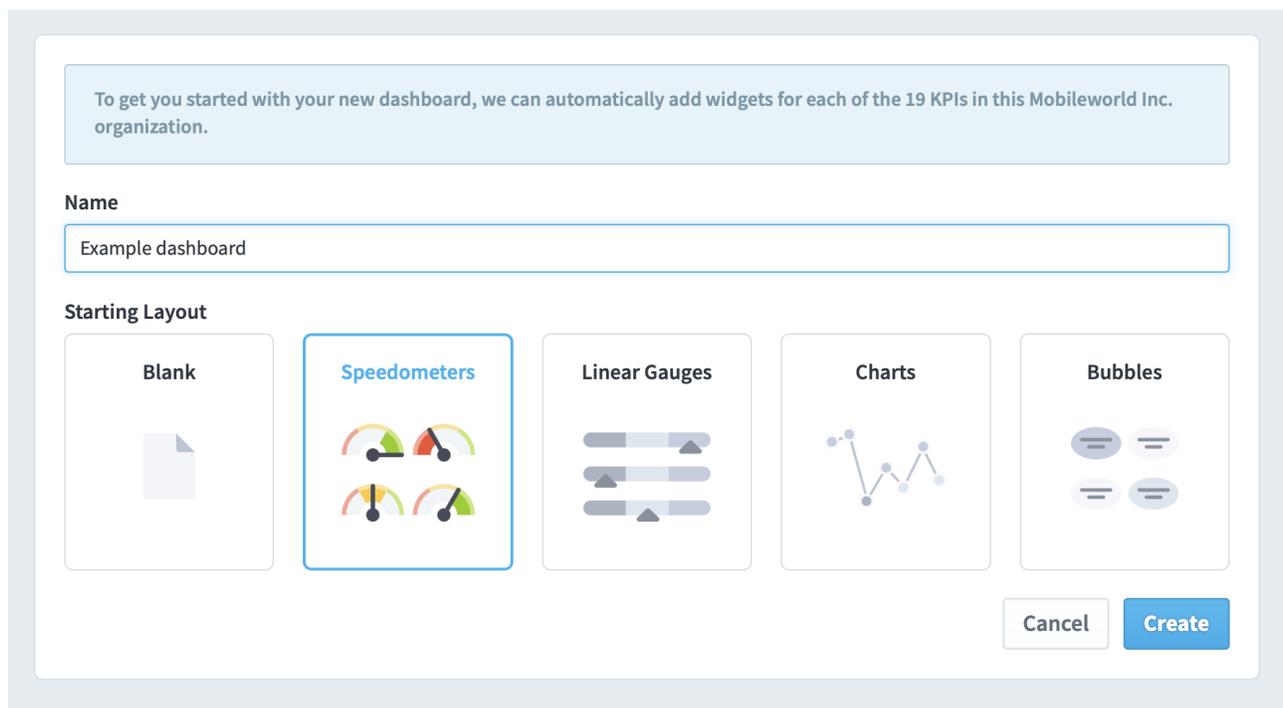
Move Copy Delete Cancel Save

Dashboards

Building Dashboards

Creating a Dashboard

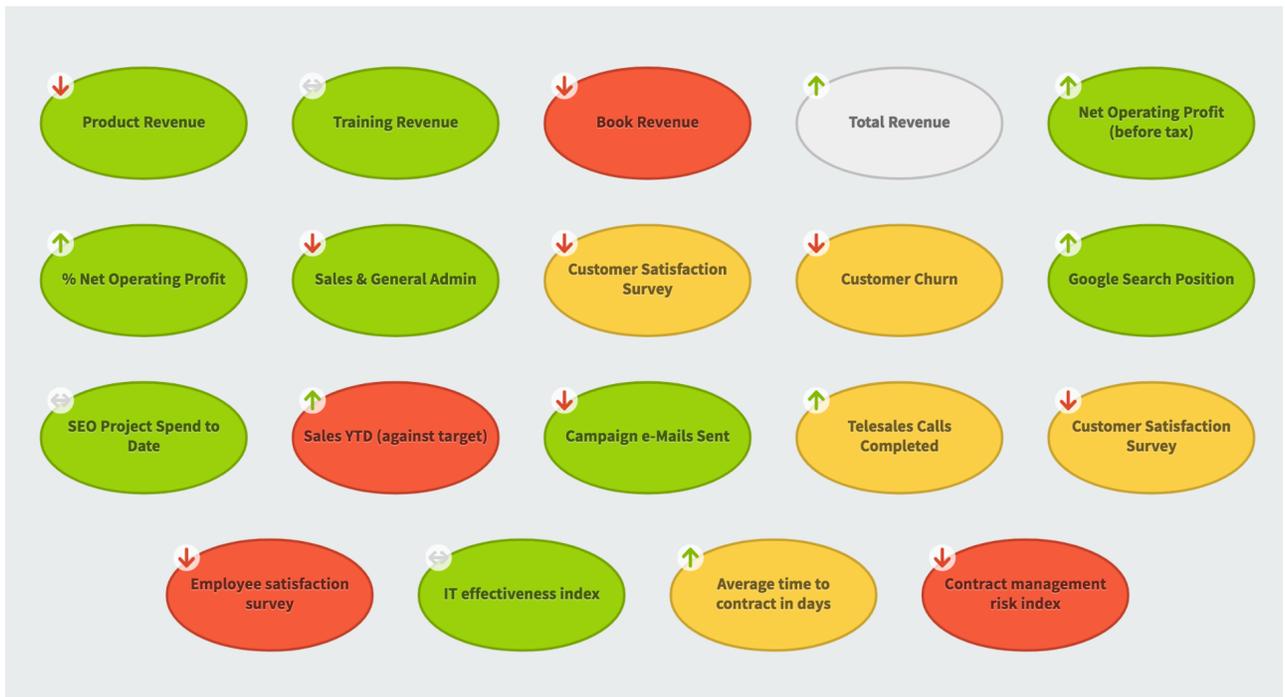
New dashboards default to Blank, but you also have the option to automatically add widgets for each KPI in the organization. This can be a great starting point for building KPI dashboards.



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.

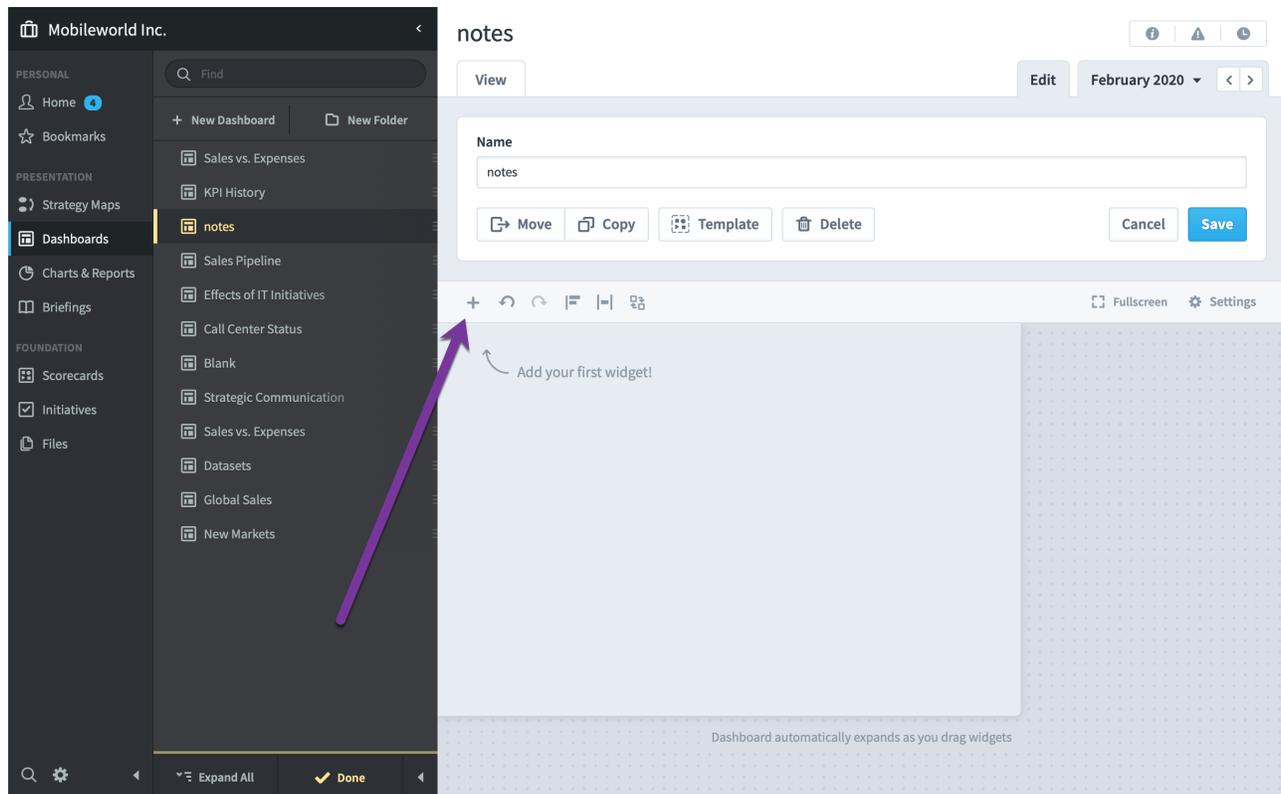


This is what the dashboard would have looked like if we had chosen bubbles.

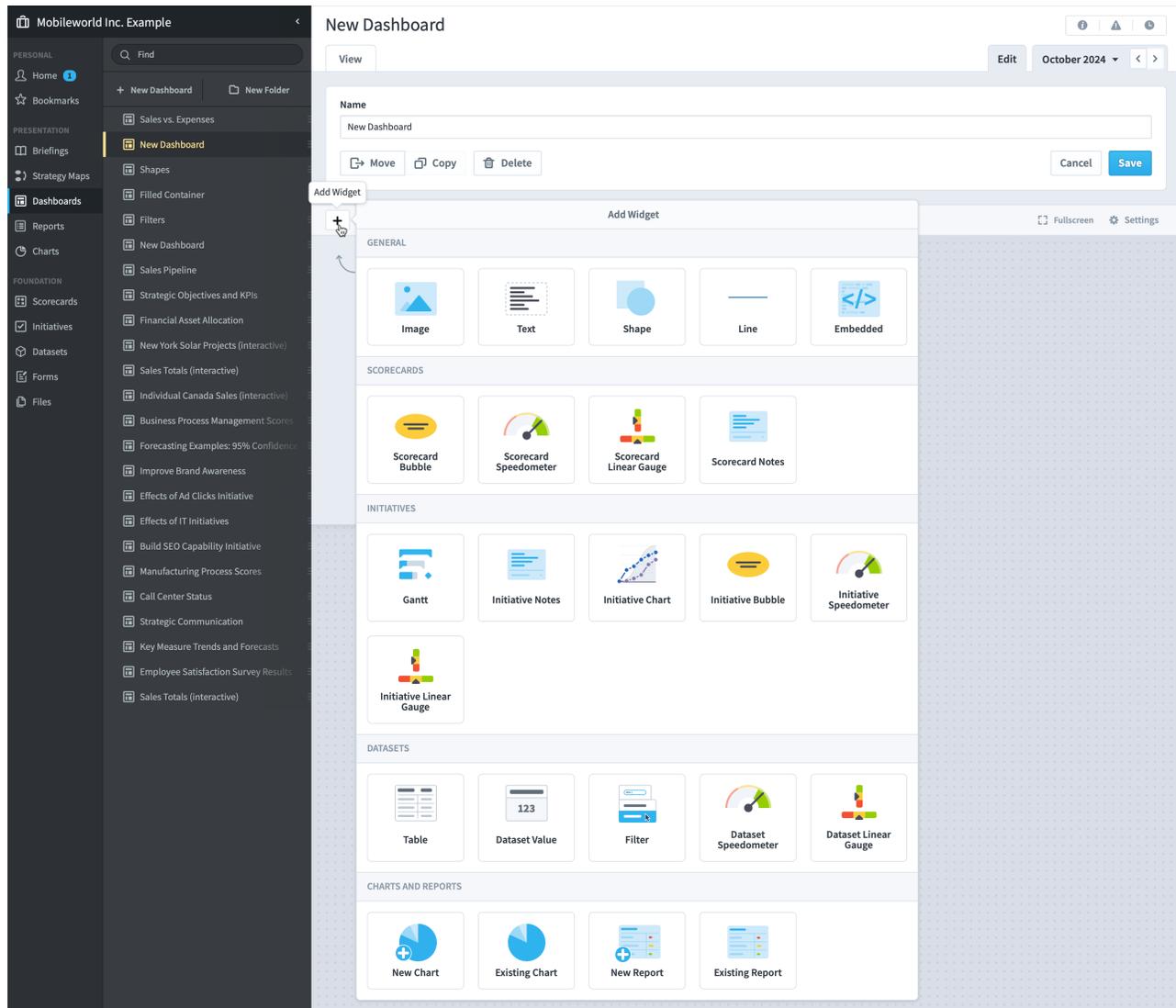


Adding Widgets

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.



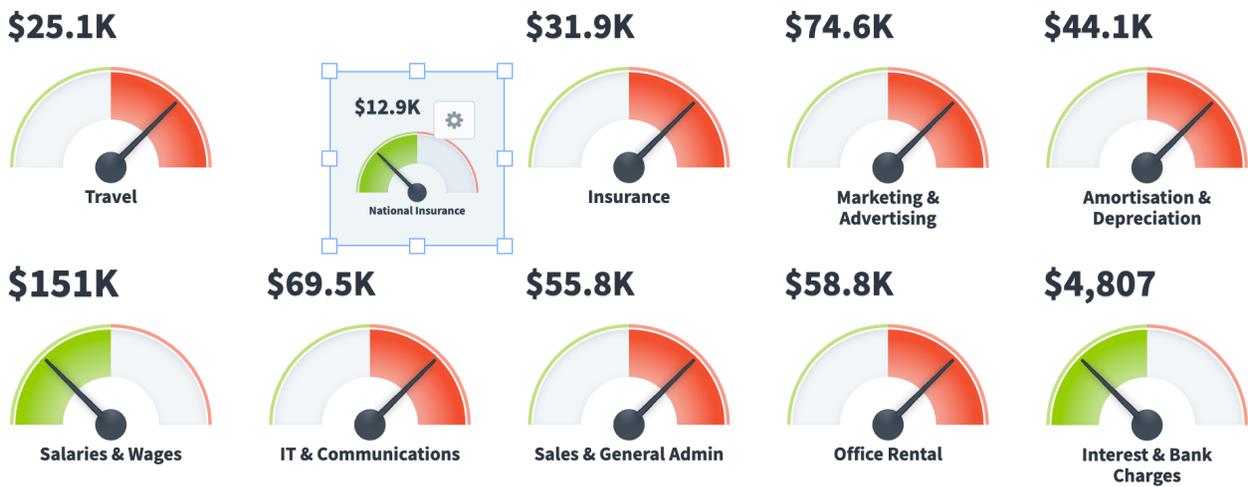
Each type of widget has unique configuration options, many of which are discussed in separate articles.

- [Image](#)
- [Text](#)
- [Shape, Bubble, and Value](#)
- [Line](#)
- [Embedded](#)
- [Speedometer and Linear Gauge](#)
- [Notes](#)
- [Gantt](#)

- Initiative Chart
- [Dataset](#)
- [Chart and Report](#)

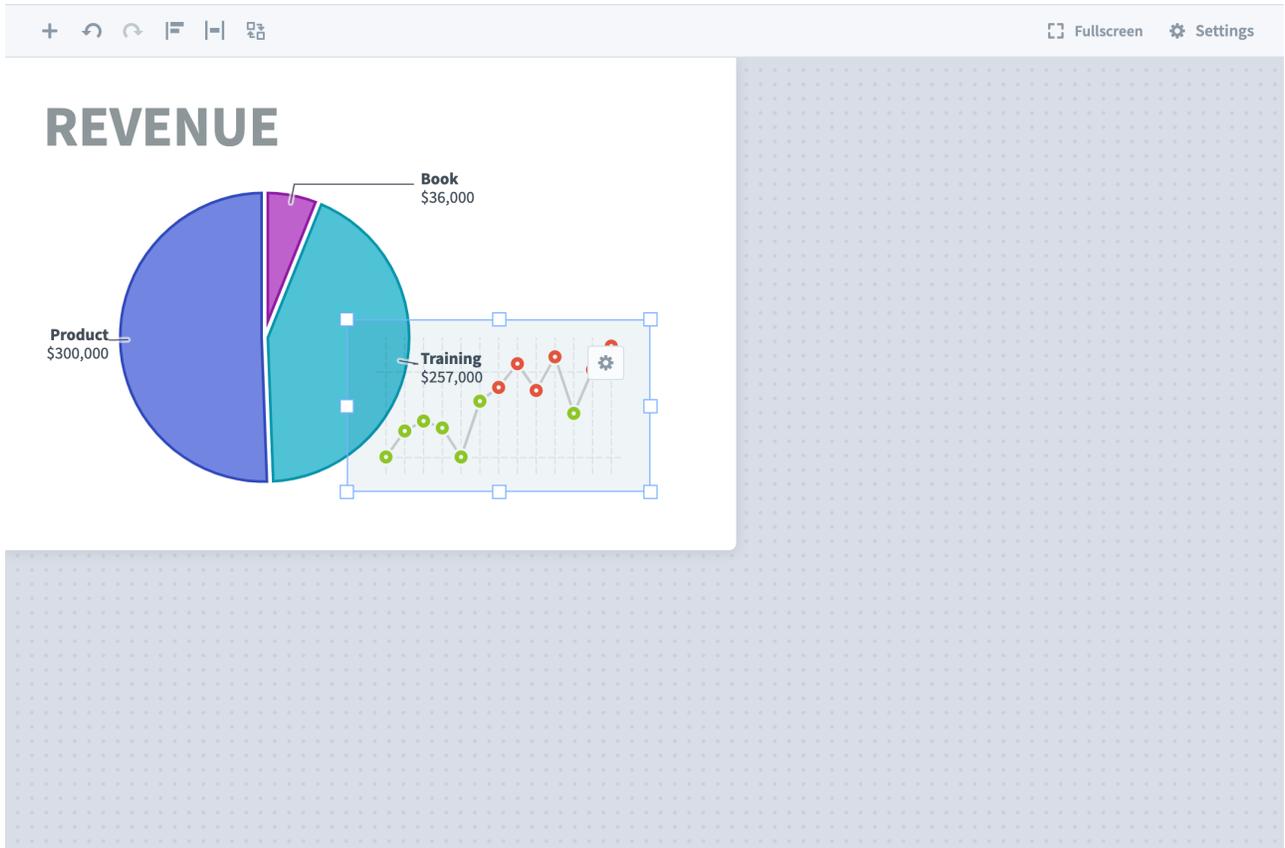
Arranging Widgets

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.



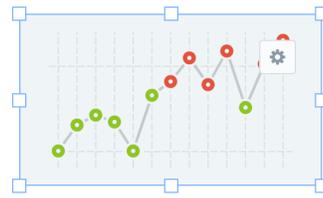
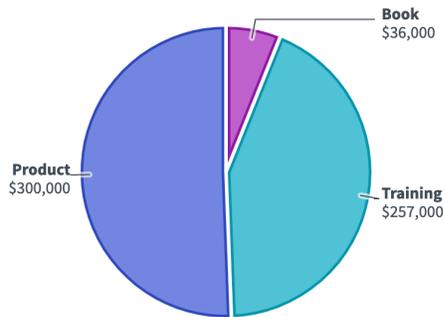
Automatically Resizing Canvas

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.

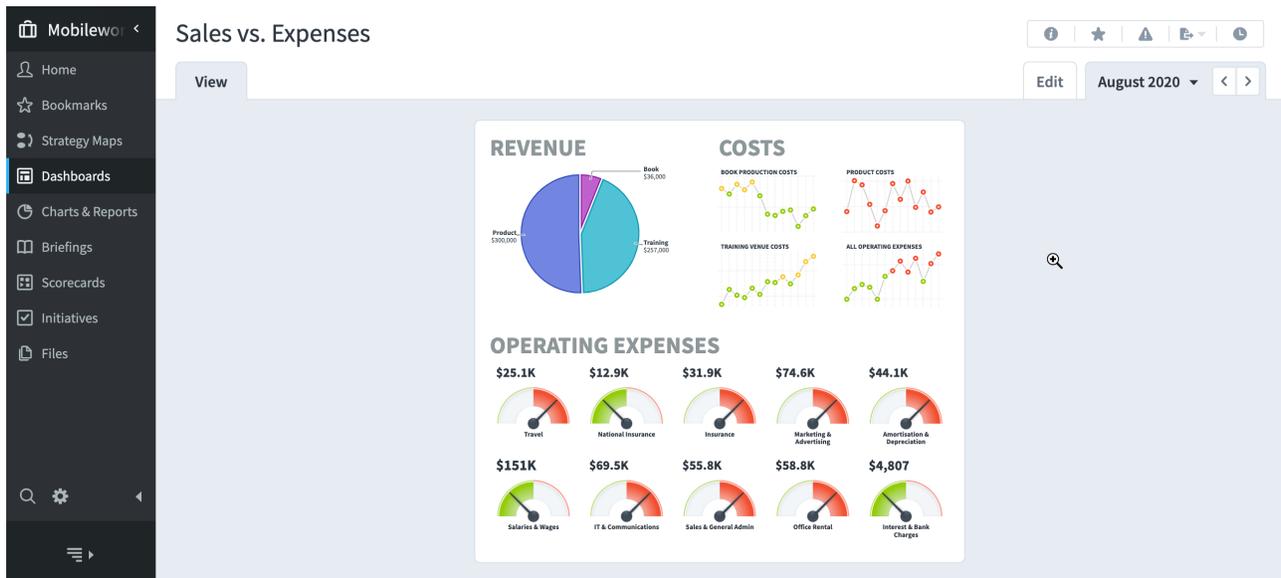
REVENUE



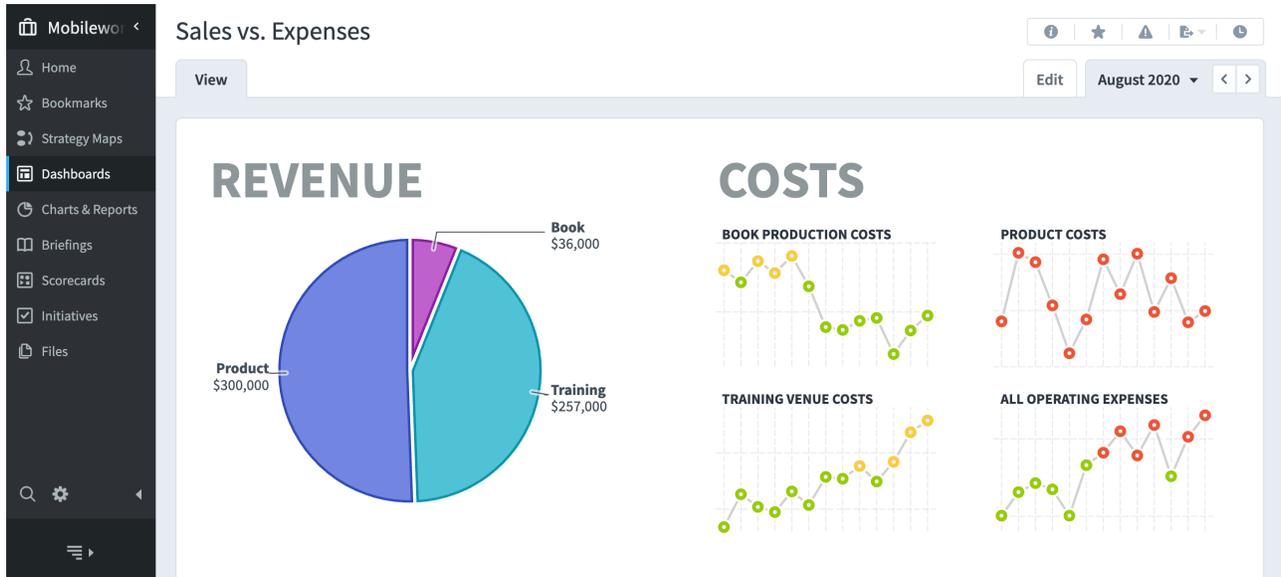
When you're viewing your dashboard, the size of your canvas doesn't matter. Spider Impact automatically zooms the dashboard so that it fits on screen. This is a lot like how PowerPoint presentations never have scroll bars during the presentation, but they do when editing.



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

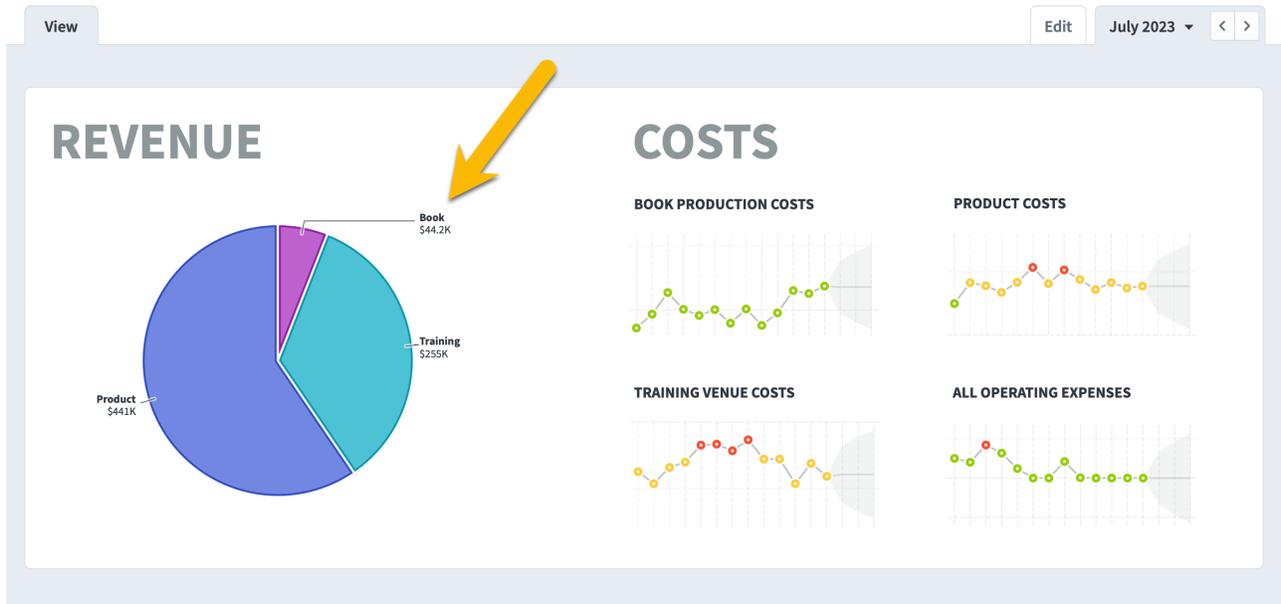


Of course you can always click on the space around the dashboard to zoom in. Clicking again will zoom you back out.

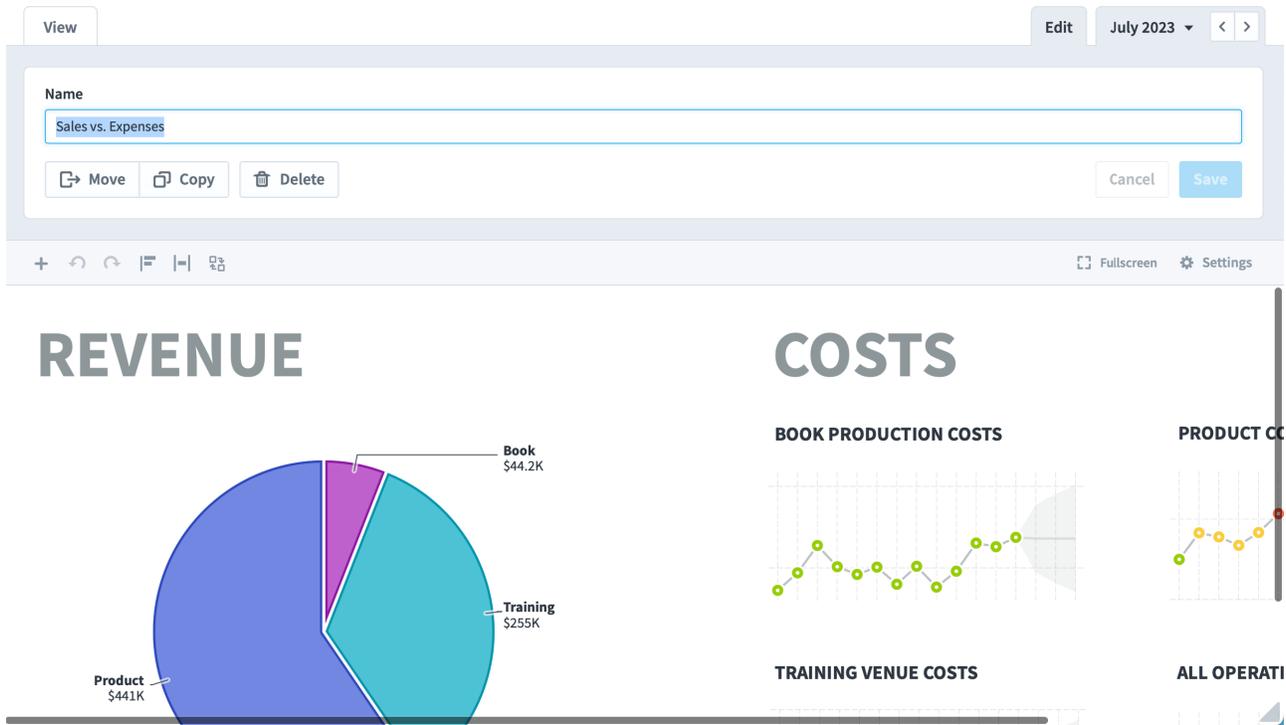


Font Size Appearance

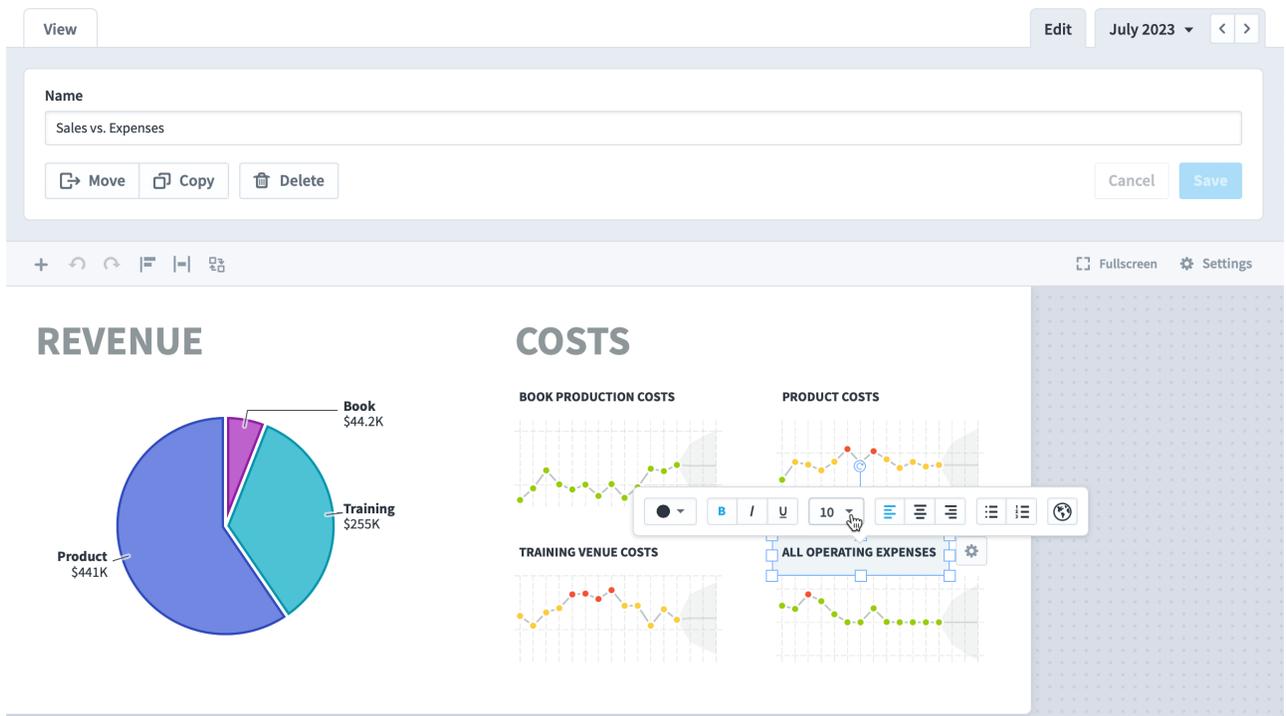
An interesting side-effect of automatic dashboard sizing is that you can universally make all text on dashboards appear larger or smaller by changing the overall size of the dashboard while keeping its general layout the same. For example, here's a dashboard where the pie chart labels look too small.



Here's what the dashboard looks like when we edit it.



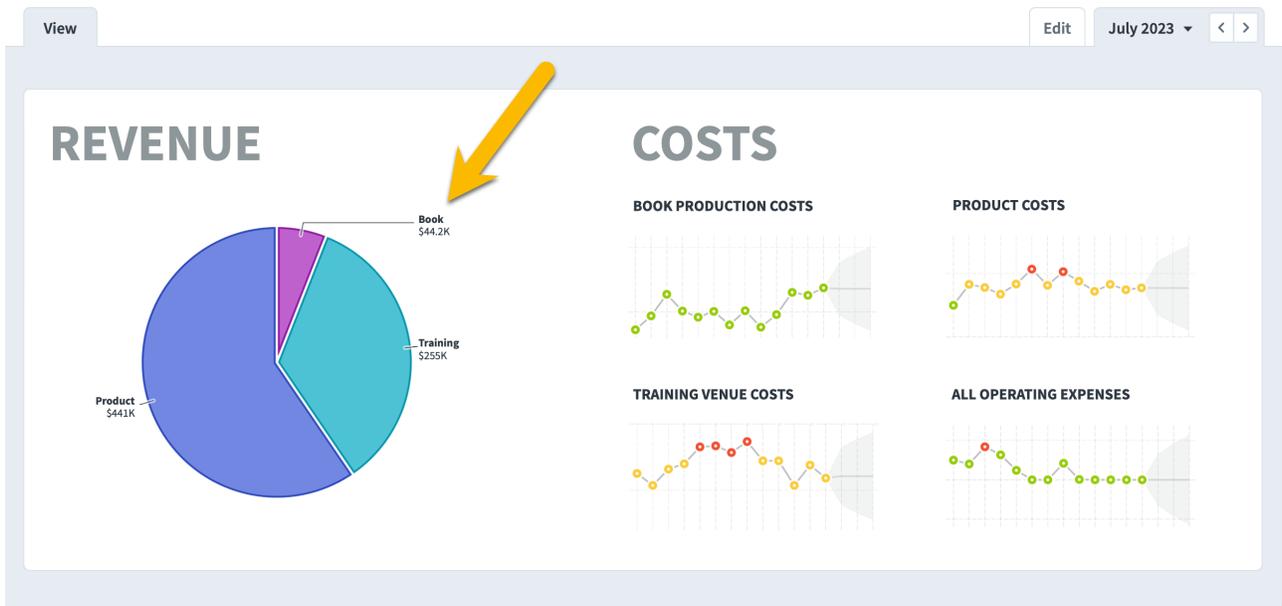
To fix the problem, we're going to resize each widget to be smaller, reduce the font size of text widgets, and move widgets closer to each other. We'll keep the general dashboard layout the same and just make everything smaller and closer.



Now when we view the dashboard, the pie chart labels are much easier to read. That's because the labels stayed the same size while everything else became much smaller.



For reference, this is what we started with.

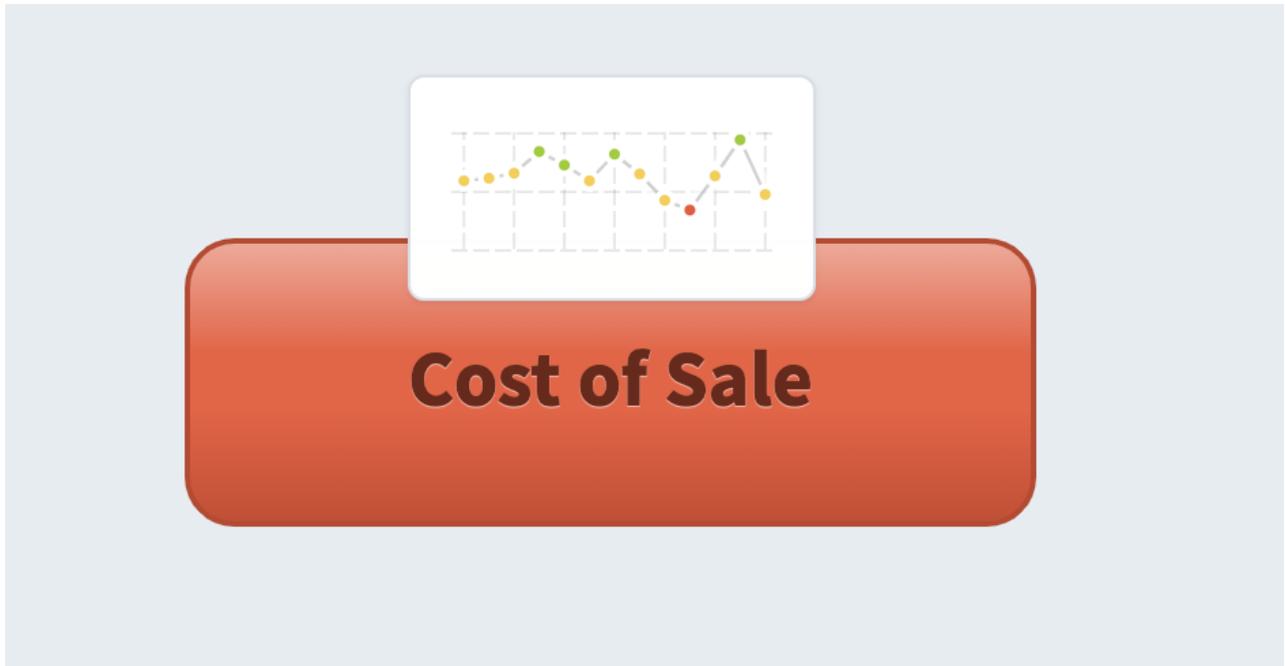


Automatic Ordering

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.

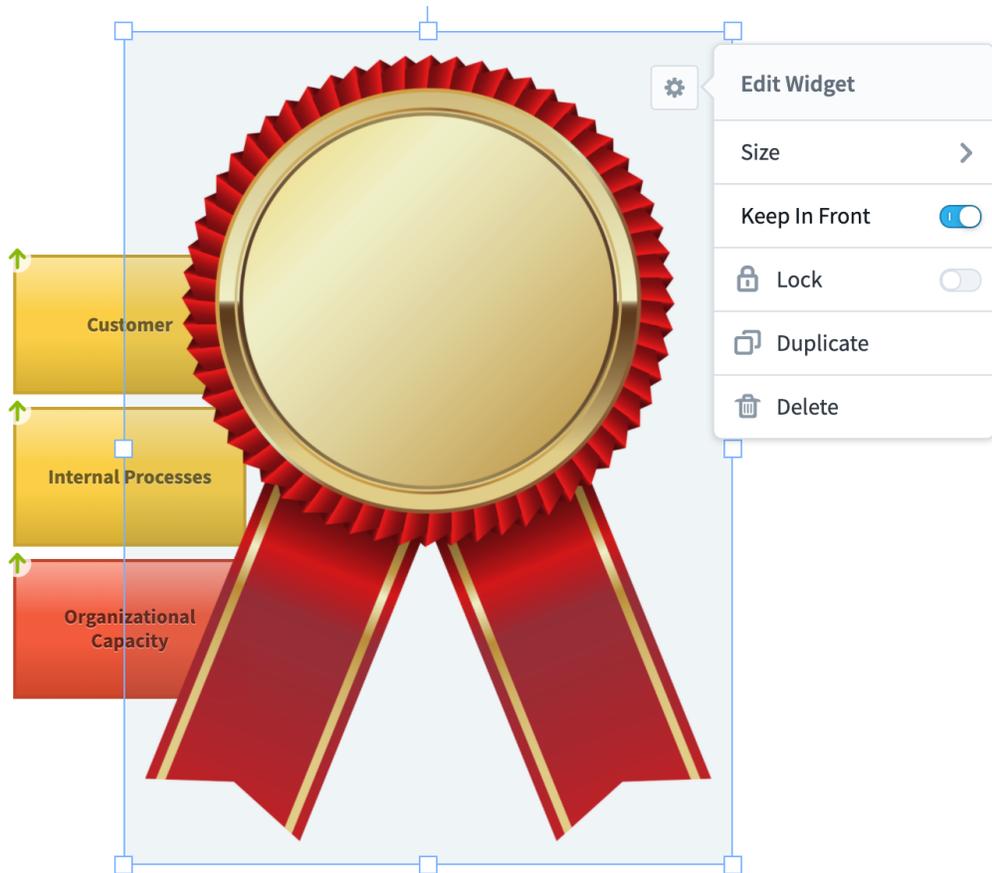


Keeping smaller widgets on top of larger widgets works great the vast majority of the time. If you're doing very complex layouts, however, there are times when you want to force a widget to the top.

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.

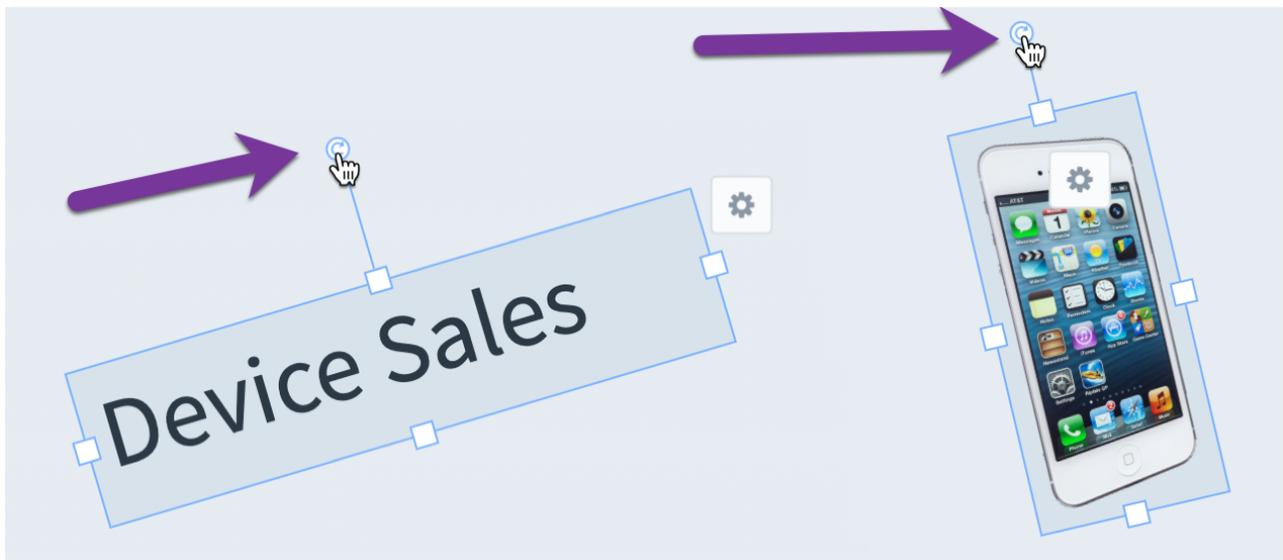


To force the award image to the top, we're going to turn on the "Keep in Front" toggle in the widget's configuration menu.



Rotating Widgets

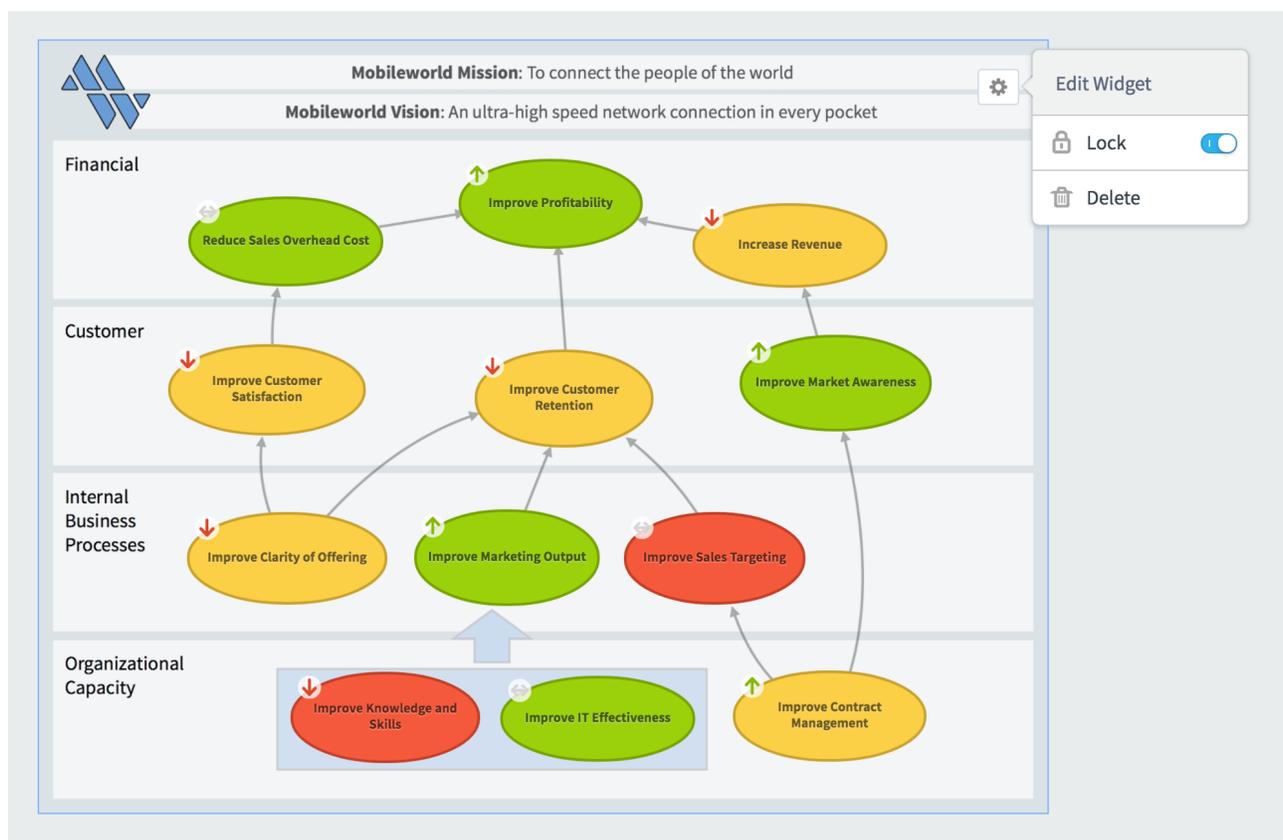
Text, Image, Shape, Bubble, and Value widgets can be rotated using their rotation handles.



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.

Charts

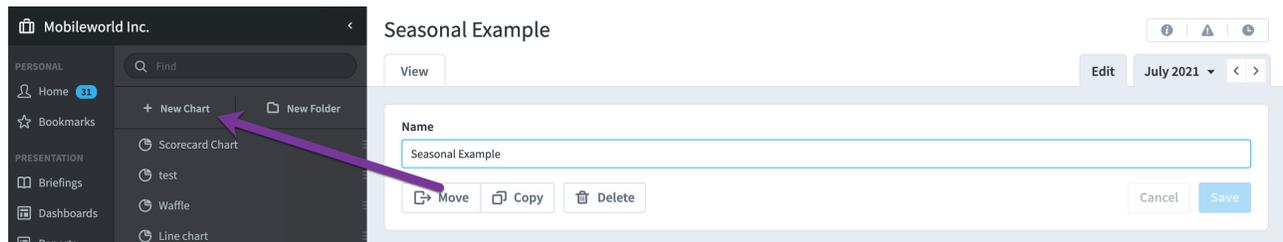
Overview of Charts

The basics

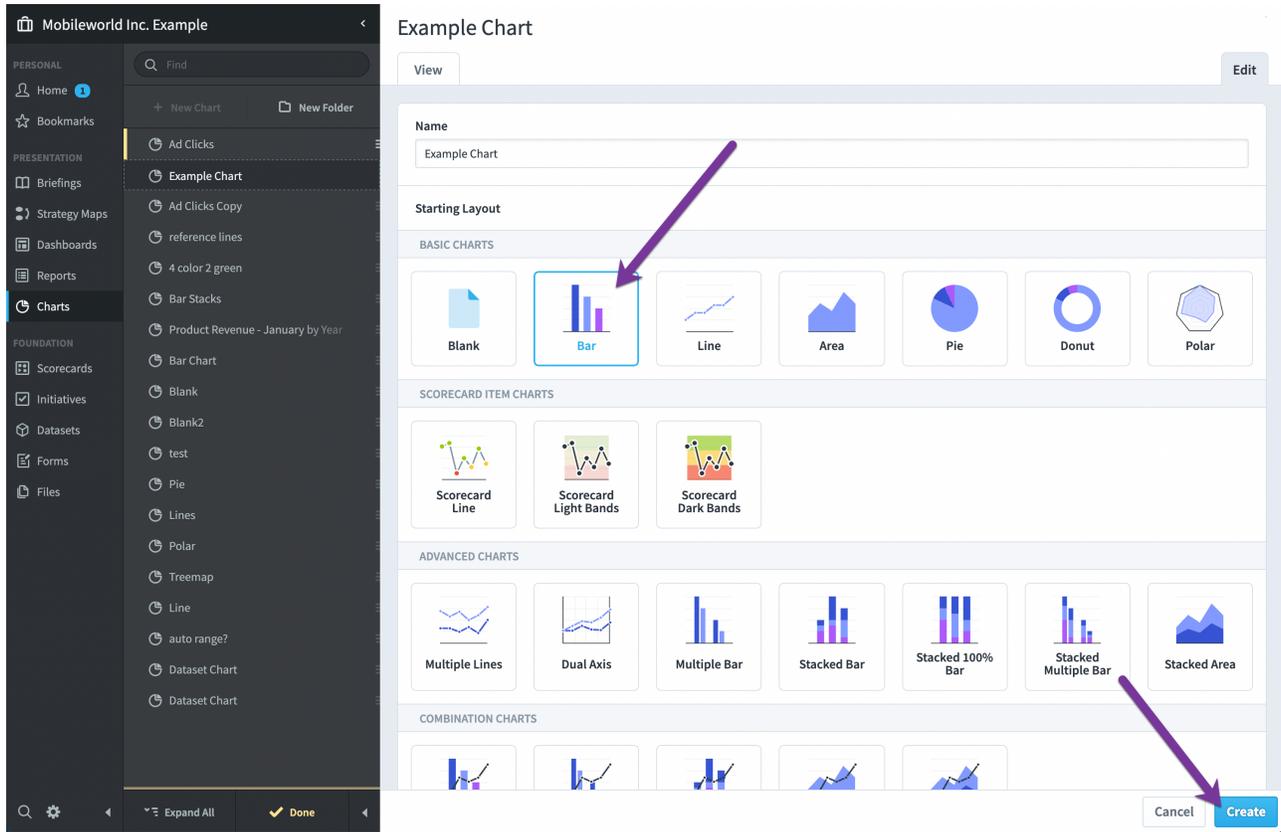
Charts visualize data for any combination of Scorecard items, Initiative items, and Dataset records. Charts are often shown as widgets on Dashboards, but they are also in the Charts section of Spider Impact.

Creating a chart

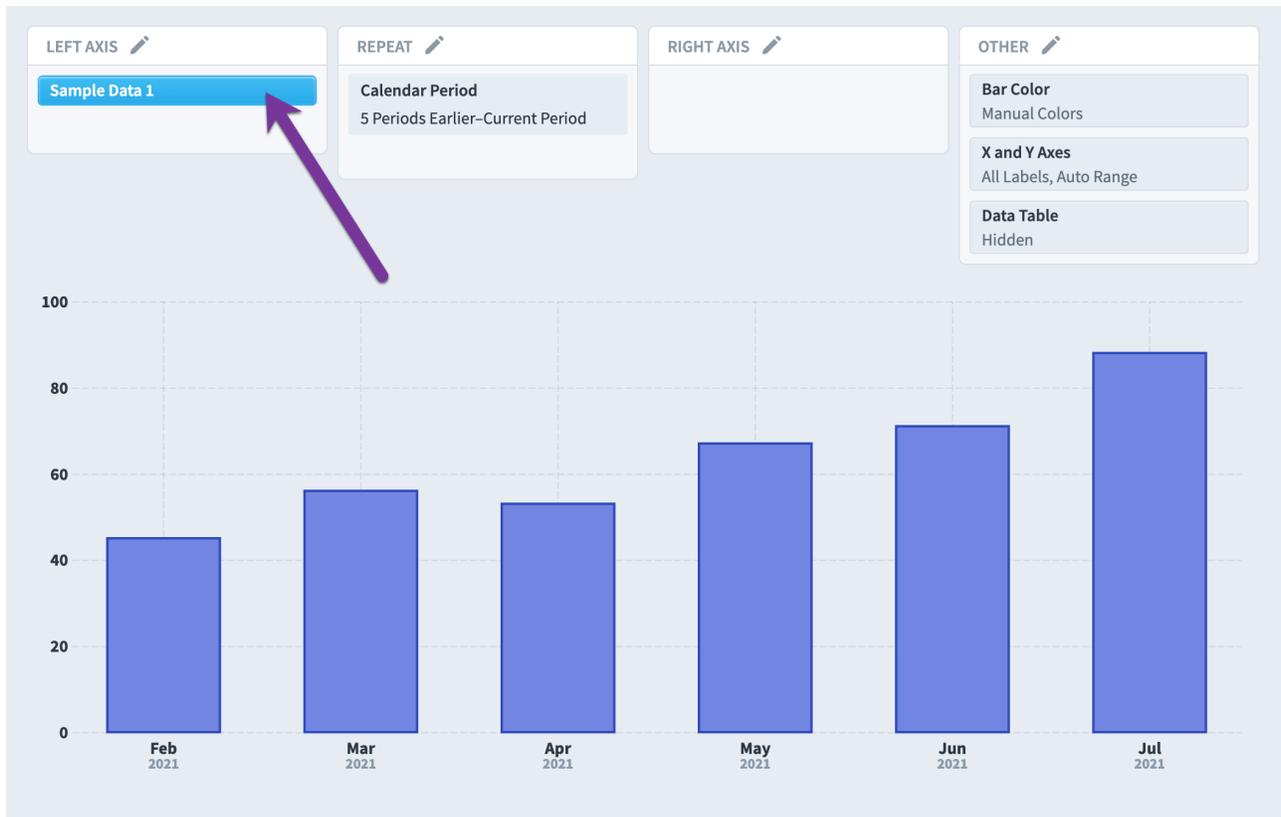
To create a chart, go to the Charts section and click the "New Chart" button.



From here you can name your new chart and decide what it should look like. The default chart type is Blank, but you can choose from a wide variety of example charts to get you started.

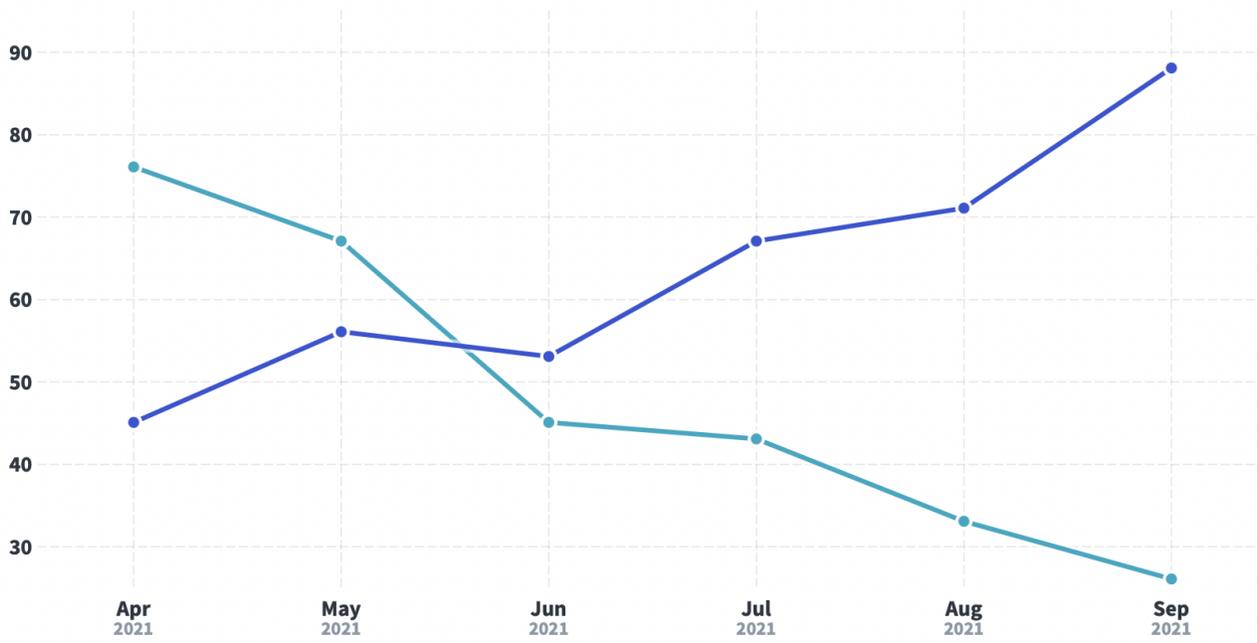
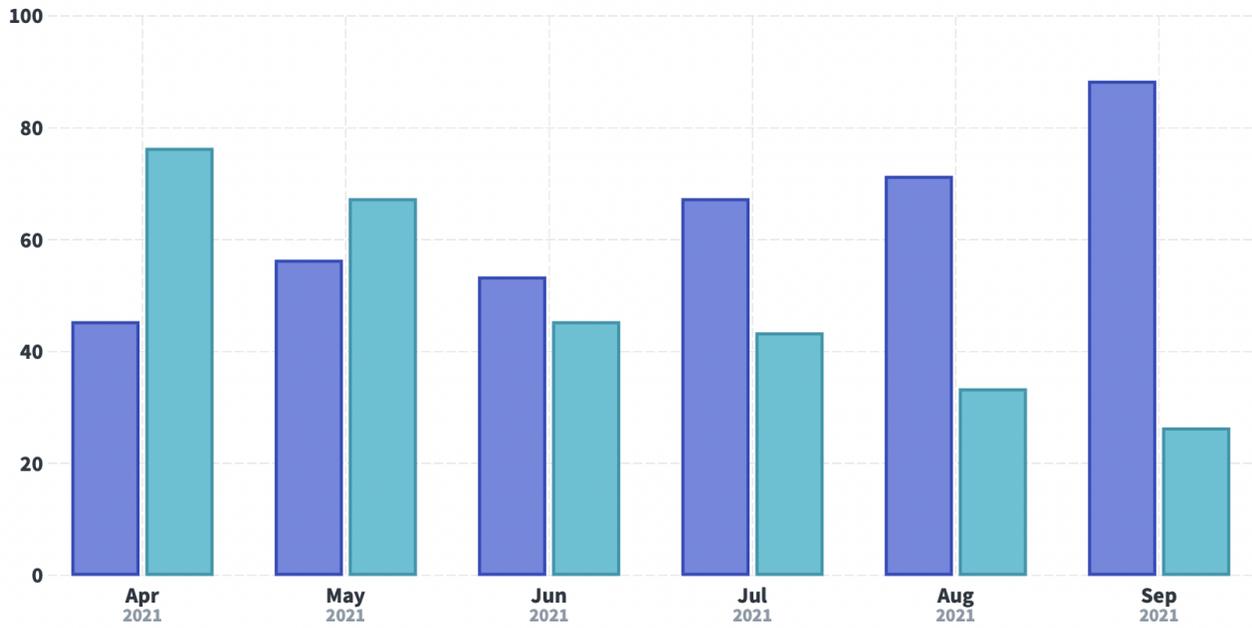


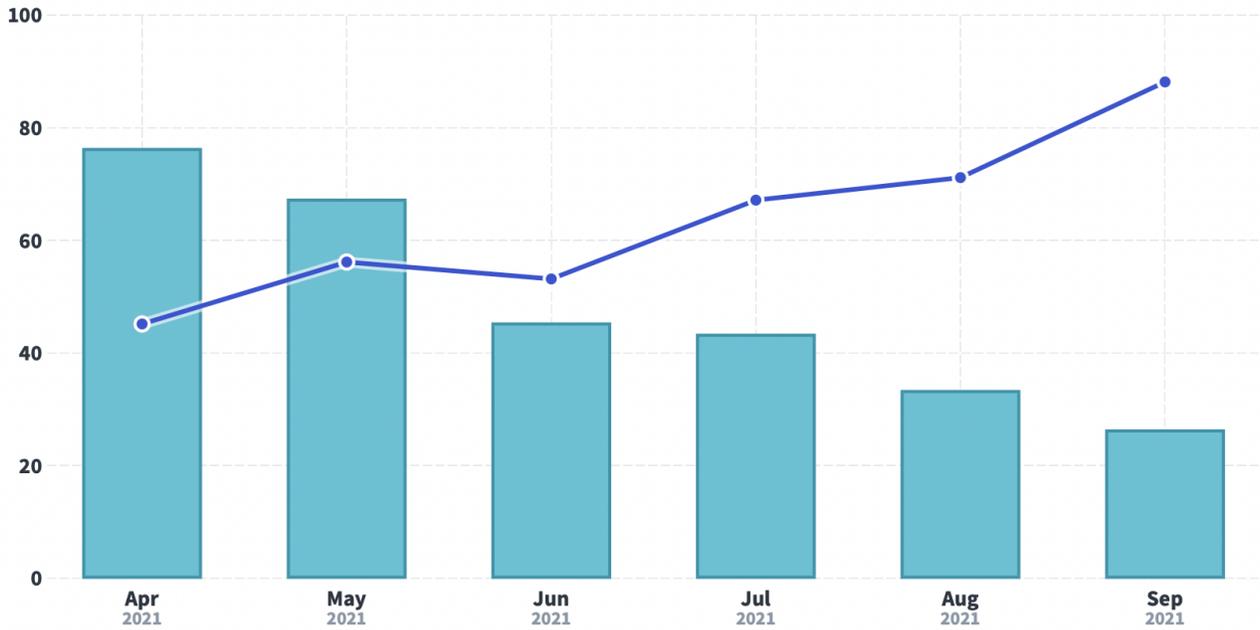
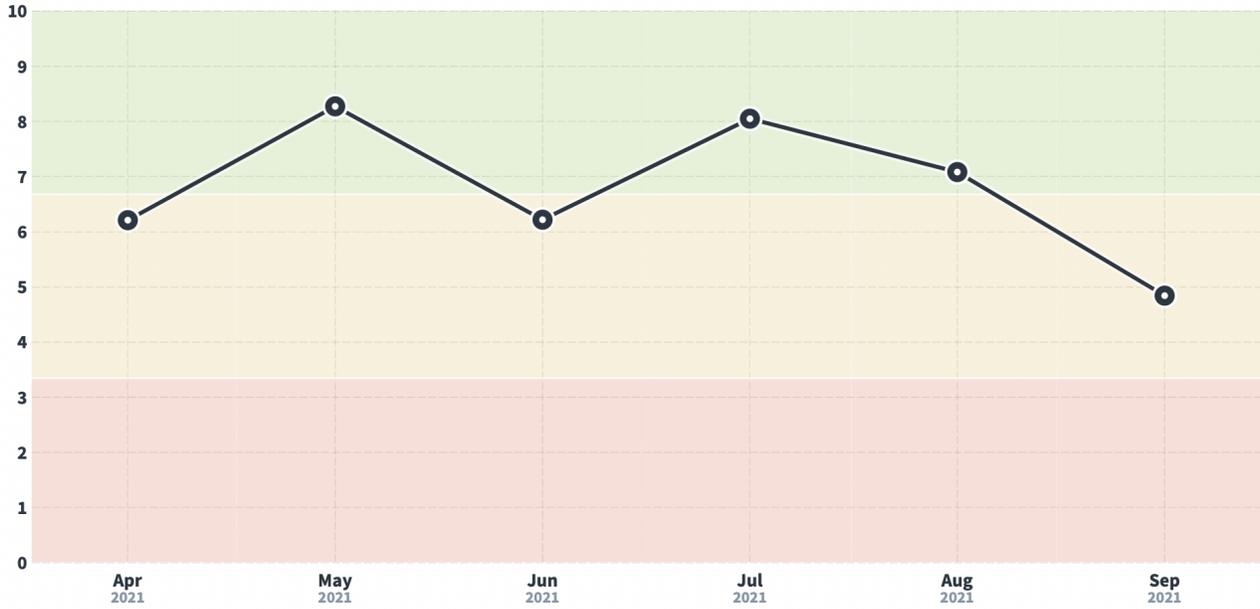
If you choose a pre-built chart example, you'll see a fully finished version of your chart with sample data. This allows you to build visualizations based on how they look rather than focusing on getting the data exactly right from the beginning. All sample data series are marked blue.

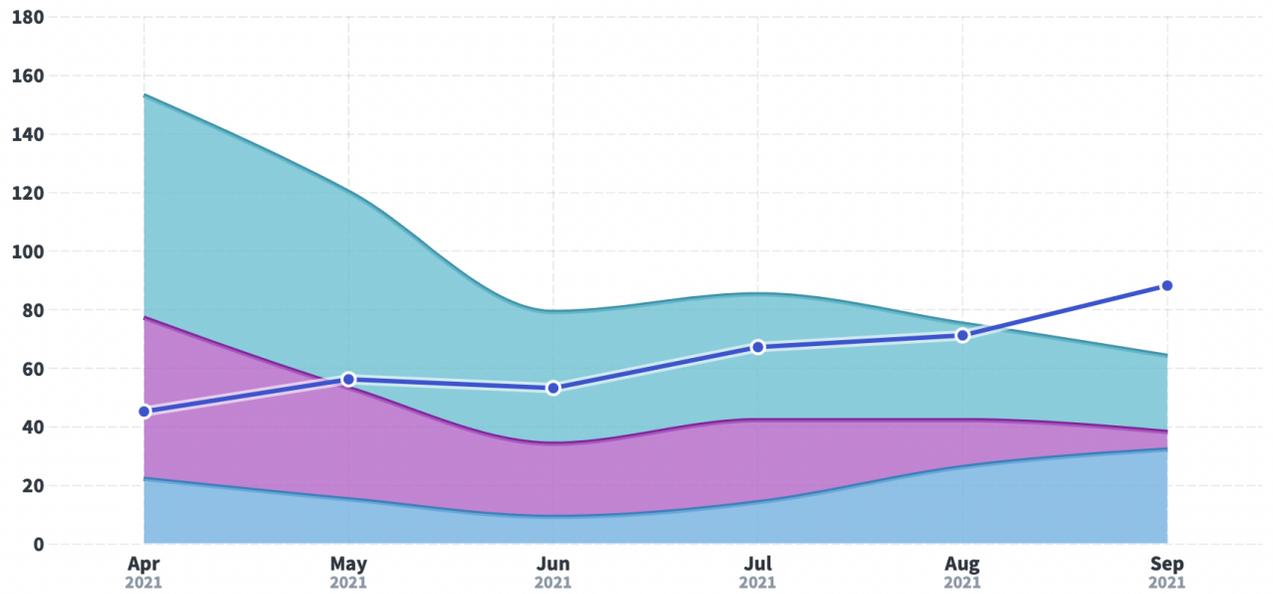
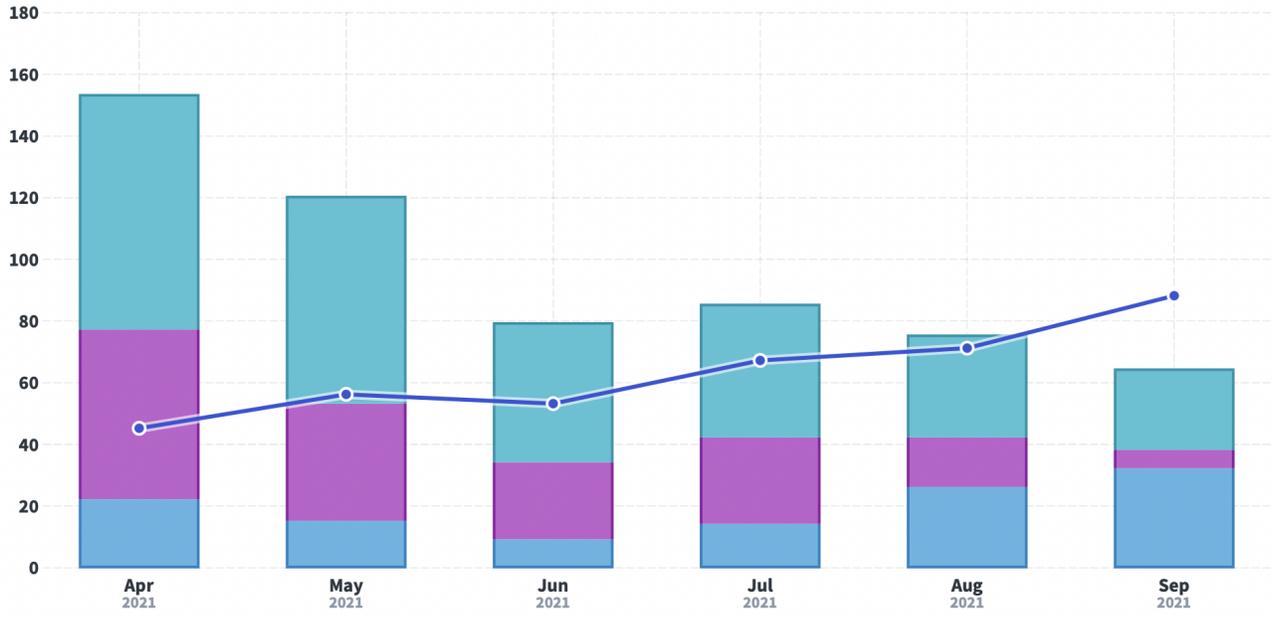


Example charts

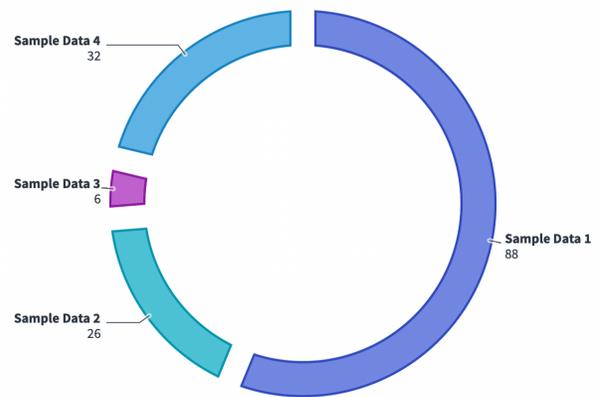
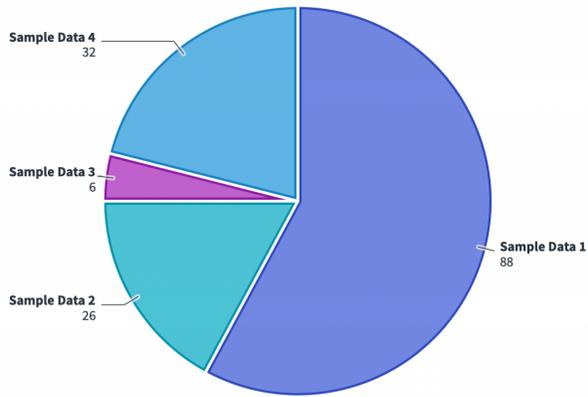
The most popular charts are line, bar, and area charts. These three types of data series can be combined on the same chart.



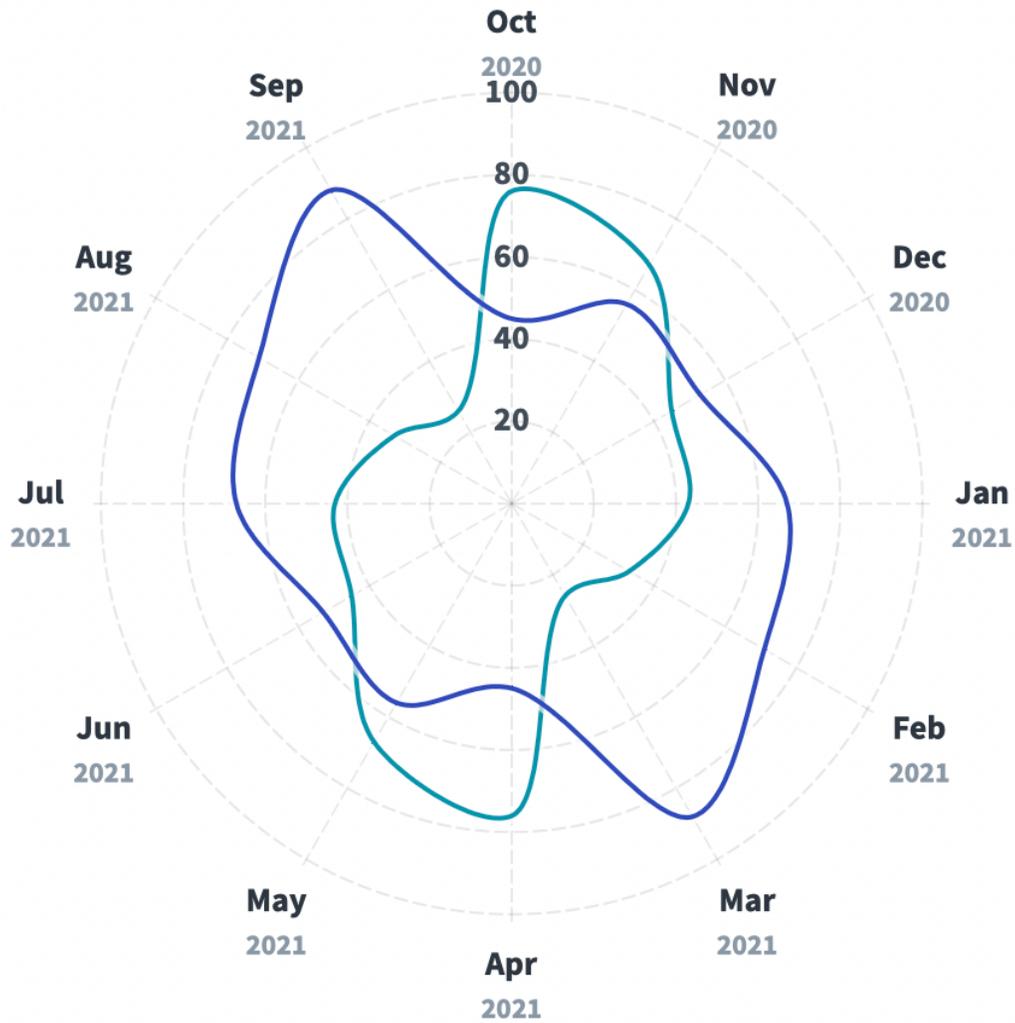




Pie and donut charts visualize pieces of a whole.



Polar charts help show cycles and scientific data.



Reports

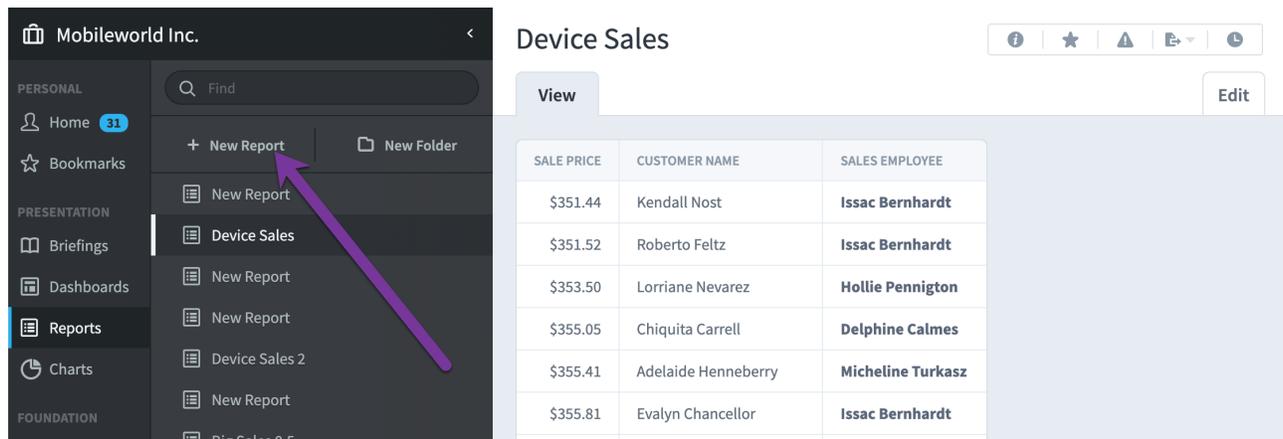
Overview of Reports

The Basics

Reports show information about many Scorecard items, Initiative items, or Dataset records at once. They have formatting, grouping, sorting, filtering, and aggregating. In short, Spider Impact now has a full-featured report designer for all of the data it tracks. For example, you can choose to view all of the downward trending KPIs, all of the initiatives owned by a particular person, or aggregated data about every Canadian employee.

Creating a report

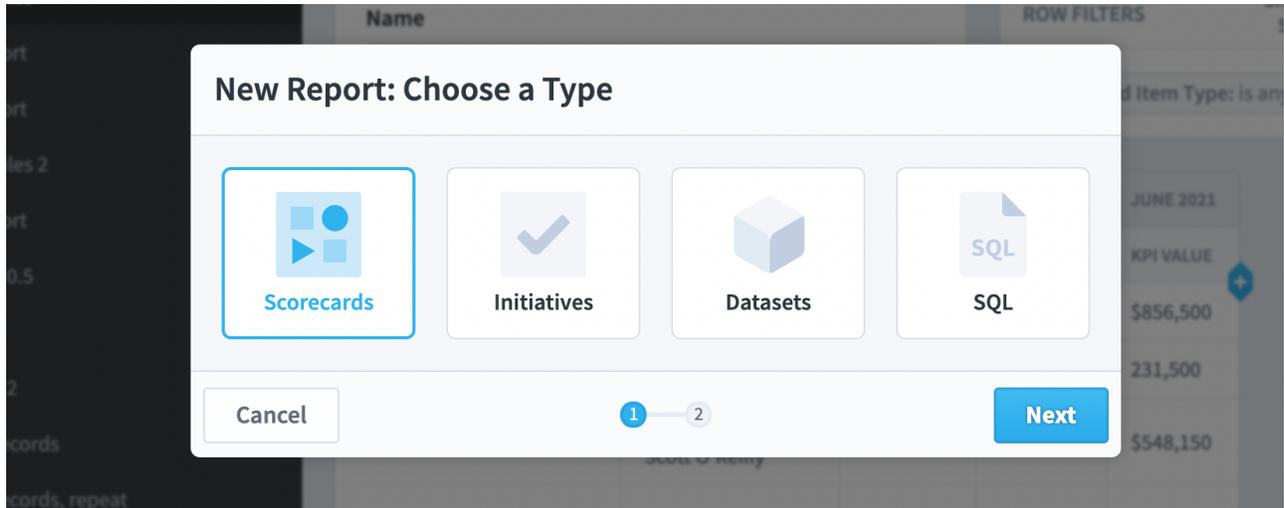
To create a new report, click the “New Report” button in the Reports section.



The screenshot shows the Spider Impact interface. On the left, a dark sidebar contains a navigation menu with sections: PERSONAL (Home, Bookmarks), PRESENTATION (Briefings, Dashboards, Reports, Charts), and FOUNDATION. The 'Reports' section is highlighted. A purple arrow points to the '+ New Report' button in the Reports section. The main content area shows a report titled 'Device Sales' with a 'View' button and an 'Edit' button. The report displays a table with three columns: SALE PRICE, CUSTOMER NAME, and SALES EMPLOYEE. The table contains seven rows of data.

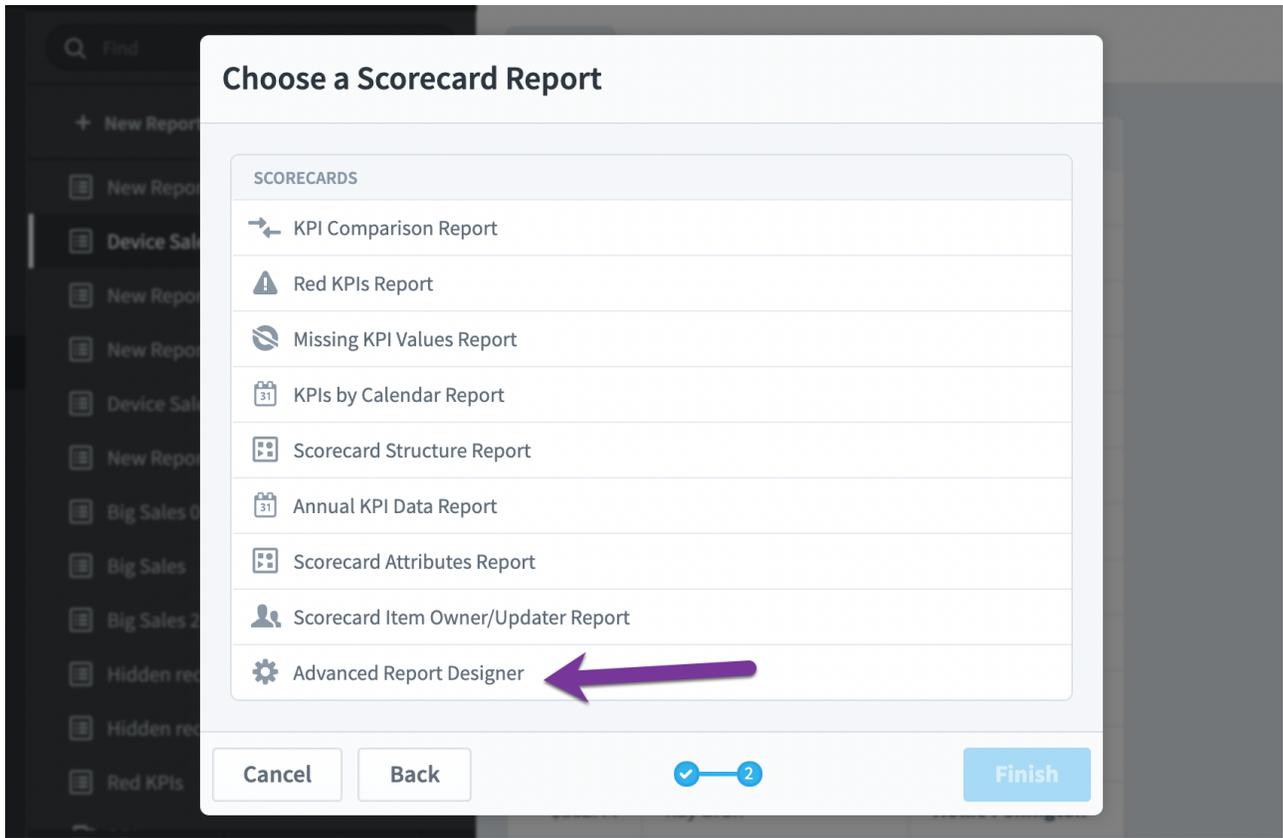
SALE PRICE	CUSTOMER NAME	SALES EMPLOYEE
\$351.44	Kendall Nost	Issac Bernhardt
\$351.52	Roberto Feltz	Issac Bernhardt
\$353.50	Lorriane Nevarez	Hollie Pennigton
\$355.05	Chiquita Carrell	Delphine Calmes
\$355.41	Adelaide Henneberry	Micheline Turkasz
\$355.81	Evalyn Chancellor	Issac Bernhardt

Each report is for a single type of data. First, we'll choose Scorecards.

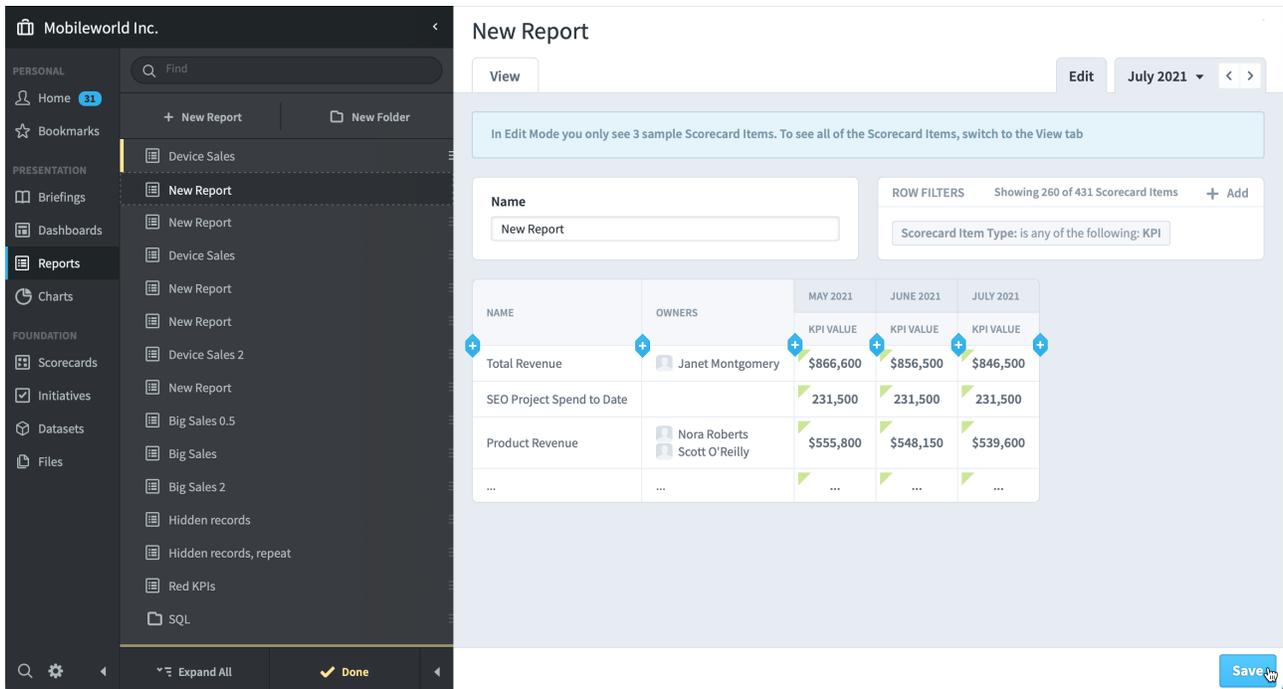


You can choose between several pre-built reports like the Red KPIs report and Missing KPI Values report. These reports get you started with "canned" reports that you can configure. See the [Prebuilt Scorecard Reports](#) article for more information.

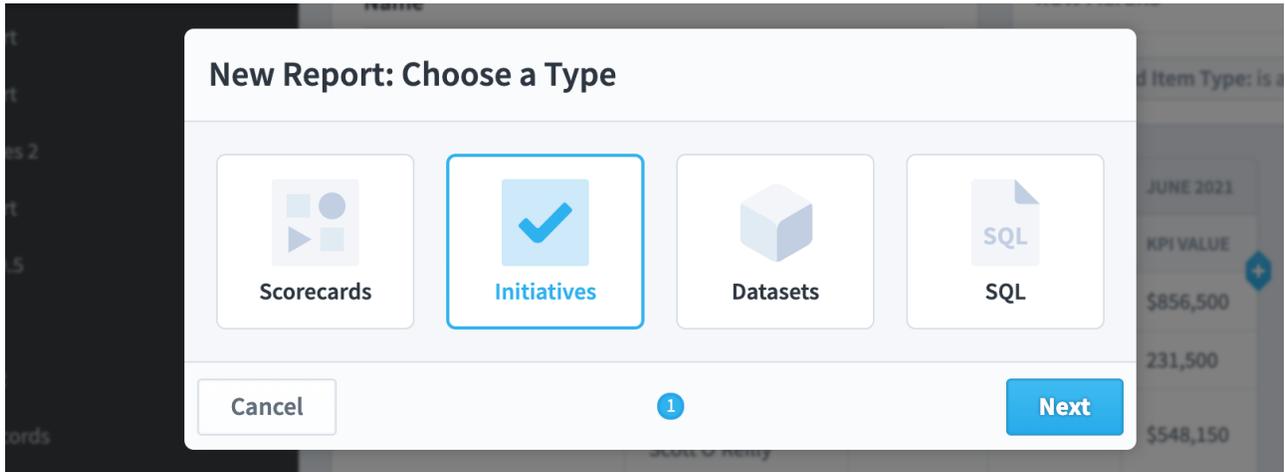
Instead, we'll build a report from scratch by choosing the Advanced Report Designer option on the bottom.



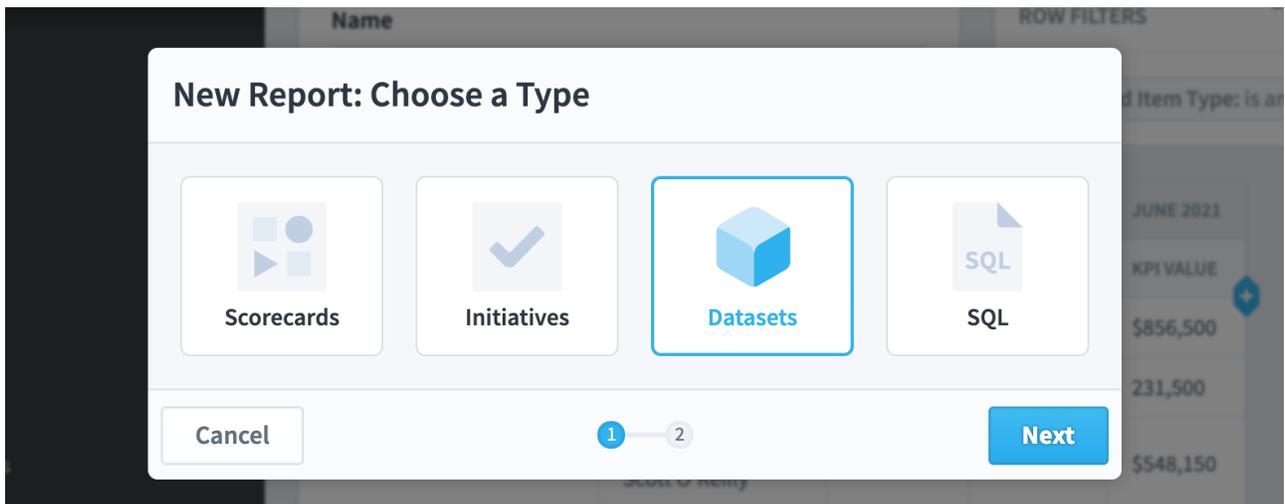
The Advanced Report Designer for scorecard items starts by showing the scorecard item name, owners, and three periods of data for all KPIs.



Let's start a new report, and this time we'll choose Initiatives.



A new Initiatives report starts with showing the budget and schedule information for all non-archived initiative items.



The third type of report is Datasets.

Name
New Report

ROW FILTERS Showing All 5 Initiatives + Add
Archive Status: is Not Archived

NAME	ASSIGNED USERS AND GROUPS	PROJECTED BUDGET VARIANCE	PROJECTED SCHEDULE VARIANCE
Research project and write a report		\$3,500 under budget	On schedule
Status Update to Board			
Develop a web marketing team	Sam Smith	\$42,500 under budget	19 days early
...

A dataset report shows data from a single dataset, which we'll choose next.

New Report: Choose a Dataset

Find

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

Expand All

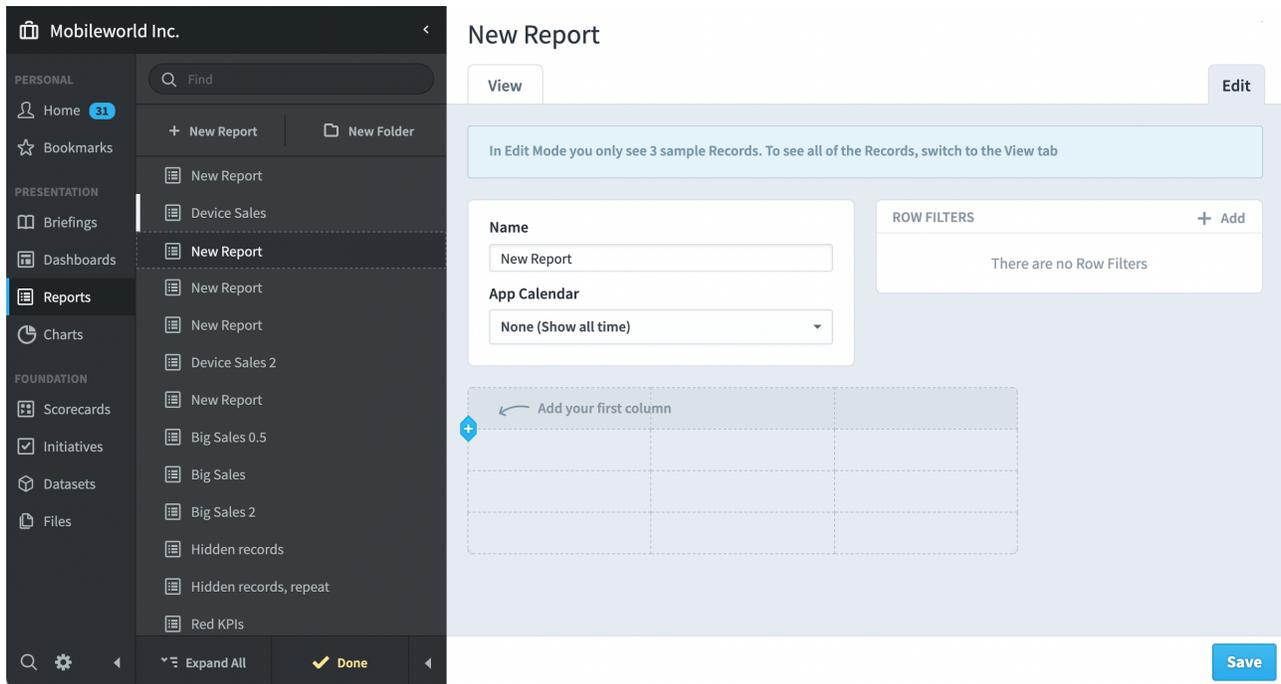
Find

- Mobileworld
 - Customers
 - Device Sales
 - test
 - Sales
 - Sales2
 - DAMIS
 - DSAID

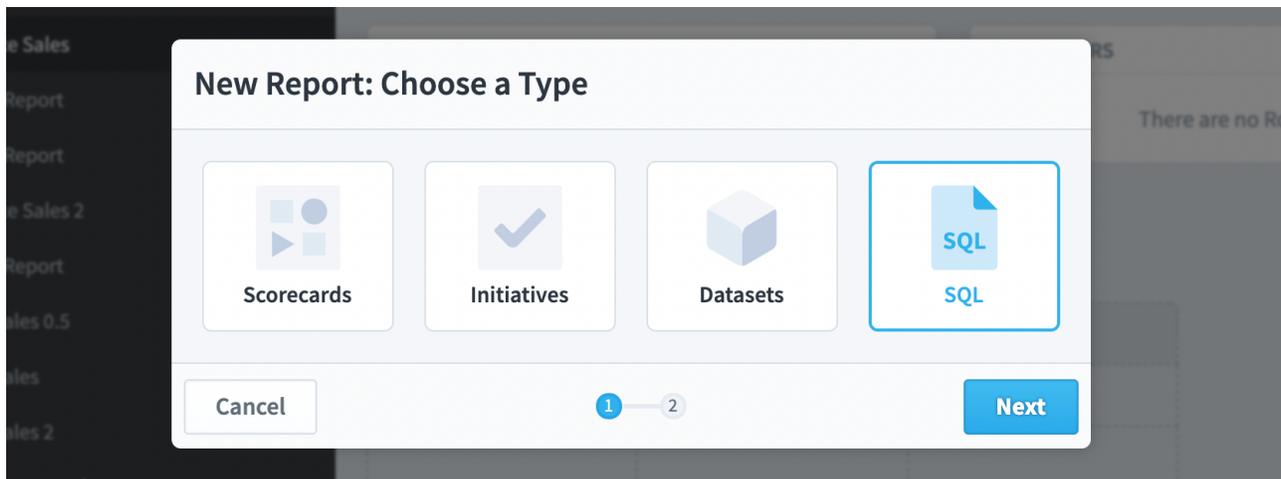
Expand All

Cancel Back 2 Create Report

Dataset reports are a little different from Scorecard and Initiative reports because every dataset field is unique to each dataset. Because of this, dataset reports start blank.



Finally, users with the right permissions can choose SQL reports.



This allows them to write SQL queries against a database that you have set up in Admin > Import Connections. For more information, see the [SQL Reports](#) article.

The View and Edit tabs

Regardless of whether you're writing reports for Scorecards, Initiatives, or Datasets, the general flow is the same. The Reports Edit tab always shows the first three records so you can get a preview of what your report will look like.

In Edit Mode you only see 3 sample Scorecard Items. To see all of the Scorecard Items, switch to the View tab

Name
New Report

ROW FILTERS Showing 290 of 436 Scorecard Items + Add
Scorecard Item Type: is any of the following: KPI

NAME	OWNERS	MAY 2021	JUNE 2021	JULY 2021
		KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue		\$697,574	\$697,974	\$701,874
SEO Project Spend to Date		231,500	231,500	231,500
Product Revenue	Full User	\$443,424	\$441,624	\$442,224
...

When you switch to the View tab, you'll see your entire report.

View		Edit July 2021 < >		
NAME	OWNERS	MAY 2021	JUNE 2021	JULY 2021
		KPI VALUE	KPI VALUE	KPI VALUE
Total Revenue		▲ \$697,574	▲ \$697,974	▲ \$701,874
SEO Project Spend to Date		▲ 231,500	▲ 231,500	▲ 231,500
Product Revenue	Full User	▲ \$443,424	▲ \$441,624	▲ \$442,224
Training Revenue	Full User	▲ \$229,900	▲ \$231,050	▲ \$234,050
Book Revenue	Full User	▲ \$24,250	▲ \$25,300	▲ \$25,600
Product Costs		▲ \$275,799	▲ \$275,832	▲ \$275,732
Training Venue Costs		▲ \$39,590	▲ \$39,181	▲ \$38,606
Book Production Costs		▲ \$8,339	▲ \$7,905	▲ \$7,797
Total Costs		▲ \$321,533	▲ \$322,833	▲ \$323,758

Column Sorting

When you're viewing a report, you can temporarily change the sorting by clicking on the column headers. See the [Building Reports](#) article for information about setting the default sorting.

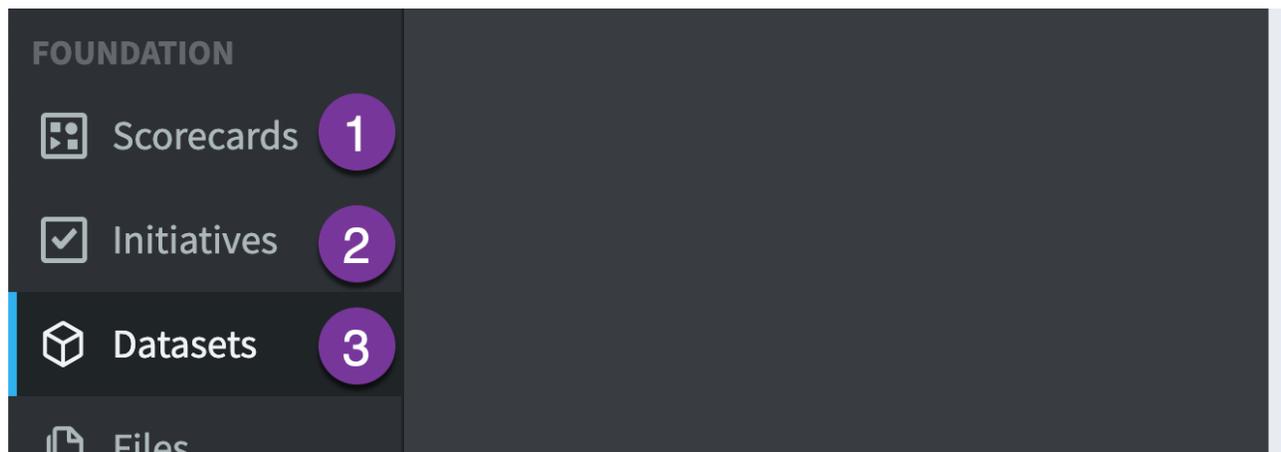
Datasets

Overview of Datasets

Overview

Spider Impact tracks three types of performance data.

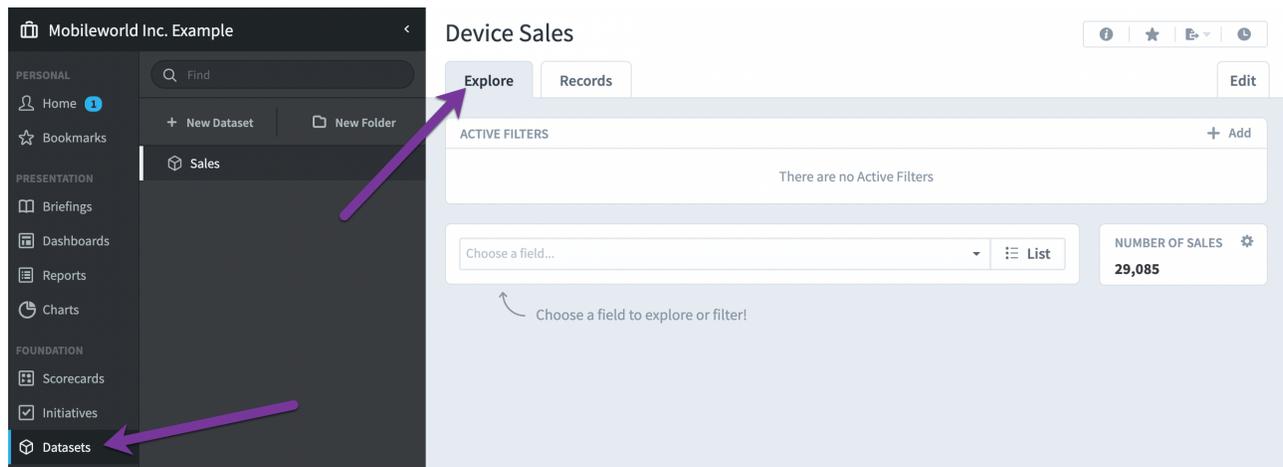
1. Scorecards measure the same things over and over. They're all about setting goals for KPIs, and then using that information to see how you're performing with your big-picture strategy. The KPIs you measure this year will usually be the same KPIs you measure next year.
2. Initiatives are temporary. They have start and end dates and usually last less than 18 months. You put initiatives in place to fix the problems you find in the Scorecards section.
3. Datasets track unstructured raw data that isn't scored. They're the business intelligence layer underneath your strategic management. You can analyze and report on dataset data directly, and you can aggregate dataset data to power KPIs in the Scorecards section.



Here we'll focus on Datasets. We'll cover how they're used, and what makes them such a powerful addition to Spider Impact.

The Explore tab

The Datasets section is great for exploring your data and quickly answering questions. It's all about slicing and dicing your data on the fly to get the answers you need immediately.

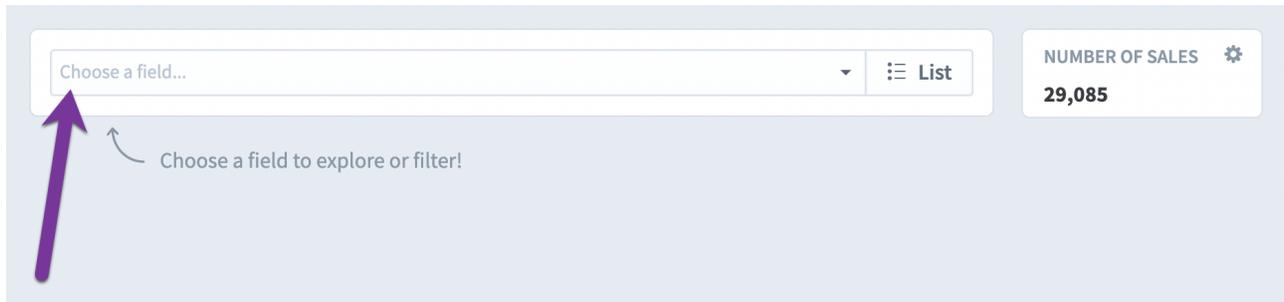


It's important to keep in mind that the Datasets section is not a presentation tool. It's the place where you store and explore all of your data. When it's time to show your dataset data to other people, the [Dashboards](#), Charts, and Reports sections have everything you need.

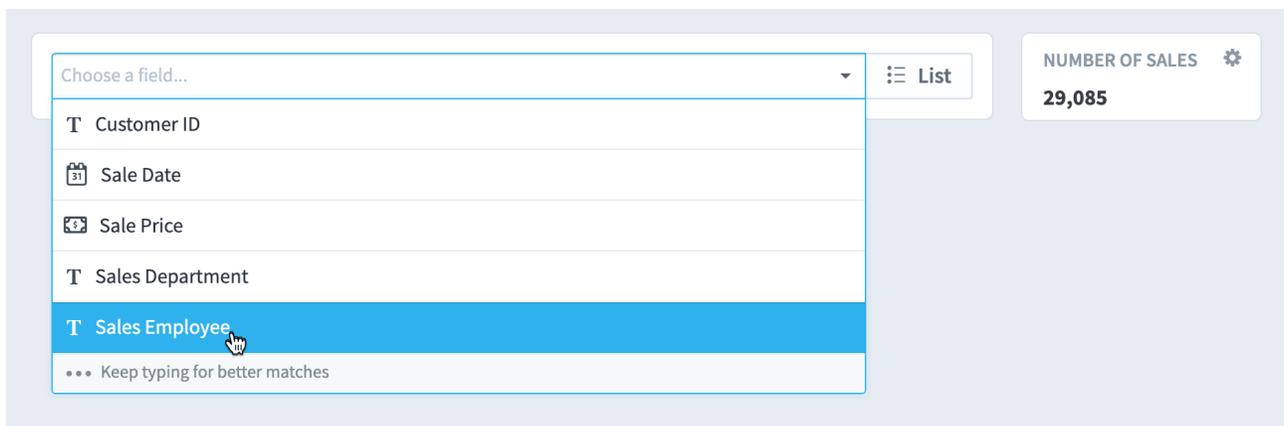
Viewing and filtering fields

We'll start with a Device Sales dataset. It contains information about the 29,085 devices our company has sold. At this point we don't know much about the data, so we'll start to explore.

To choose a field to view, click on the field menu.



This lists all of the dataset's fields. As you can see, there's information about things like the sale date, the price, and the customer. We'll chose Sales Employee.



This adds a table breaking down all of the sales in this dataset by sales employee. Issac Bernhardt is in the lead with 5,717 sales.

Choose a field... ▾ List NUMBER OF SALES ⚙️
29,085

SALES EMPLOYEE ⚙️ 🗑️

SALES EMPLOYEE	NUMBER OF SALES	SALES %
Issac Bernhardt	5,717	19.66%
Odell Sheler	5,104	17.55%
Hollie Pennigton	4,943	17%
Micheline Turkasz	4,713	16.2%
Delphine Calmes	4,228	14.54%
Other (Show 3 More)	4,380	15.06%

Next, we're going to choose the Sales Date field in the main field menu. This adds another table that breaks the sales down by date. As you can see, May 2021 was our best sales month.

Choose a field... ▾ List NUMBER OF SALES ⚙️
29,085

SALES EMPLOYEE ⚙️ 🗑️

SALES EMPLOYEE	NUMBER OF SALES	SALES %
Issac Bernhardt	5,717	19.66%
Odell Sheler	5,104	17.55%
Hollie Pennigton	4,943	17%
Micheline Turkasz	4,713	16.2%
Delphine Calmes	4,228	14.54%
Other (Show 3 More)	4,380	15.06%

SALE DATE ⚙️ 🗑️

SALE DATE	NUMBER OF SALES	SALES %
May 2021	728	2.5%
July 2021	726	2.5%
June 2021	703	2.42%

If we want to see only the sales for May 2021, we can just click on that row in the Sale Date table.

Choose a field... List

NUMBER OF SALES 728

SALES EMPLOYEE

SALES EMPLOYEE	NUMBER OF SALES	SALES %
Issac Bernhardt	168	23.08%
Odell Sheler	133	18.27%
Hollie Pennigton	126	17.31%
Micheline Turkasz	111	15.25%
Delphine Calmes	104	14.29%
Other (Show 3 More)	86	11.81%

SALE DATE

< Back in May 2021

SALE DATE	NUMBER OF SALES	SALES %
May 2021	728	100%

This applies a "Sale Date = May 2021" filter to all of the data on the screen. In the upper right corner, we can see that the number of sales has been updated to 728. All of the numbers in the Sales Employee table now reflect only May 2021 sales. To remove the filter, just click the back button in the Sale Date table.

Although you can do advanced data exploration on the Datasets Explore tab, this is what most of your analysis will look like. You choose fields to view, and then you click on a row to filter.

General

Overview of Initiatives

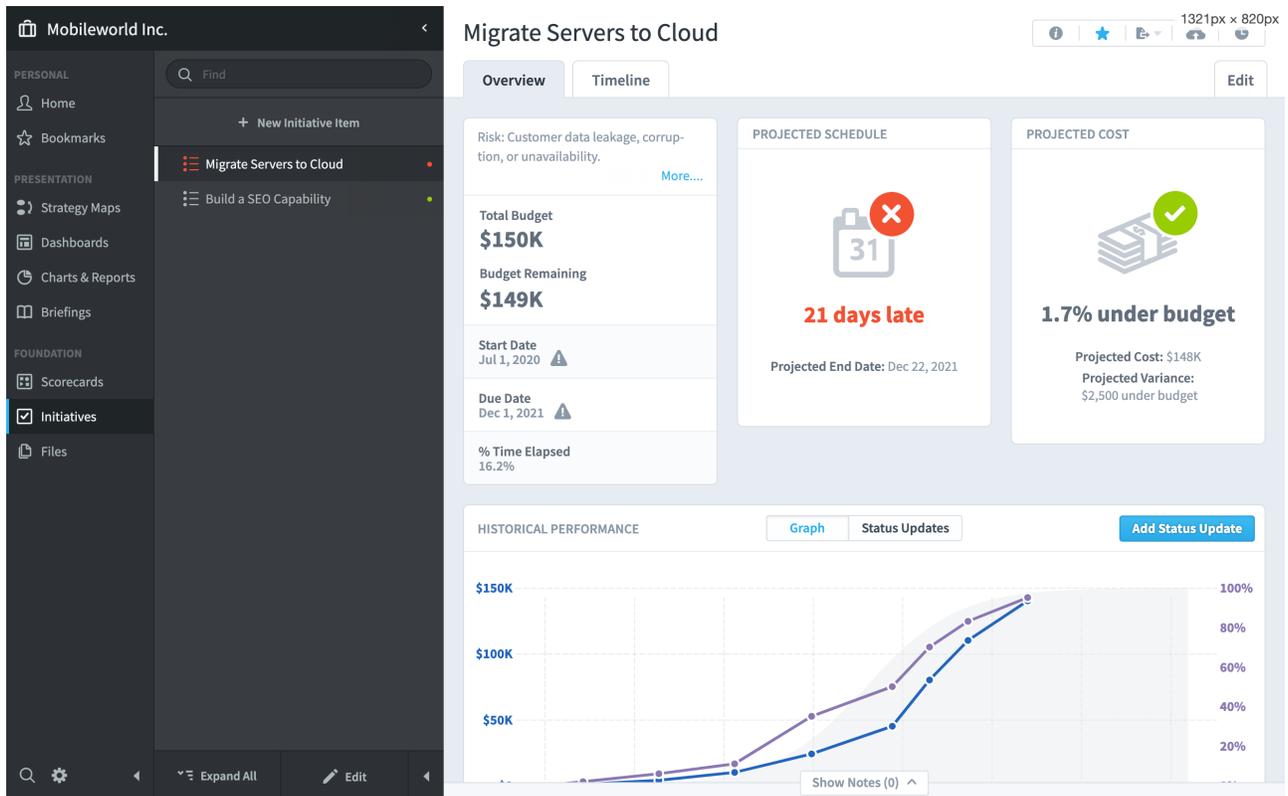
The Basics

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.

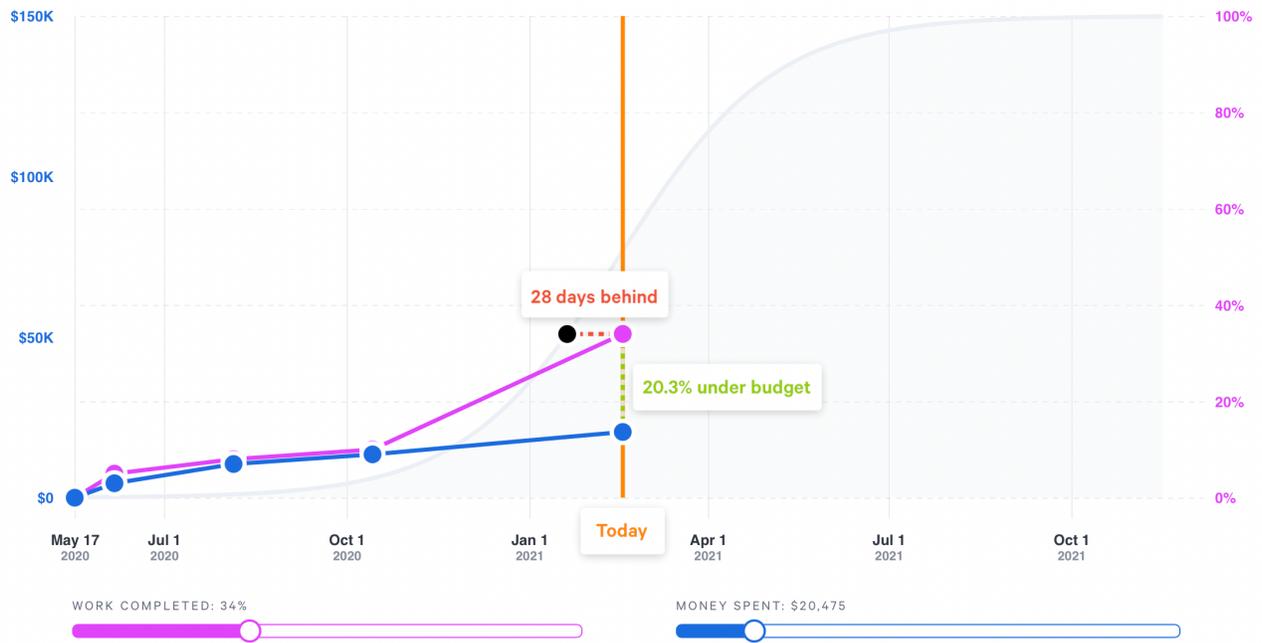
Overview Tab

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.



Predicting Budget and Schedule

Spider Impact uses Earned Value Management (EVM) to predict whether your initiatives will be on time and under budget. We've put together an [entire article on EVM](#) to explain exactly what's going on behind the scenes.



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.

Migrate Servers to Cloud

Overview | Timeline
Edit

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

Total Budget **\$150K**

Budget Remaining **\$10K**

Start Date

Due Date **Dec 1, 2020**

% Time Elapsed 72.1%

PROJECTED SCHEDULE

239 days early

Projected End Date: Apr 6, 2020

PROJECTED TOTAL BUDGET

1.7% under budget

Projected Total: \$148K
Projected Variance: \$2,500 under budget

Two weeks ago **Paul Johnson** changed this from **Oct 1, 2020** to **Dec 1, 2020**.

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

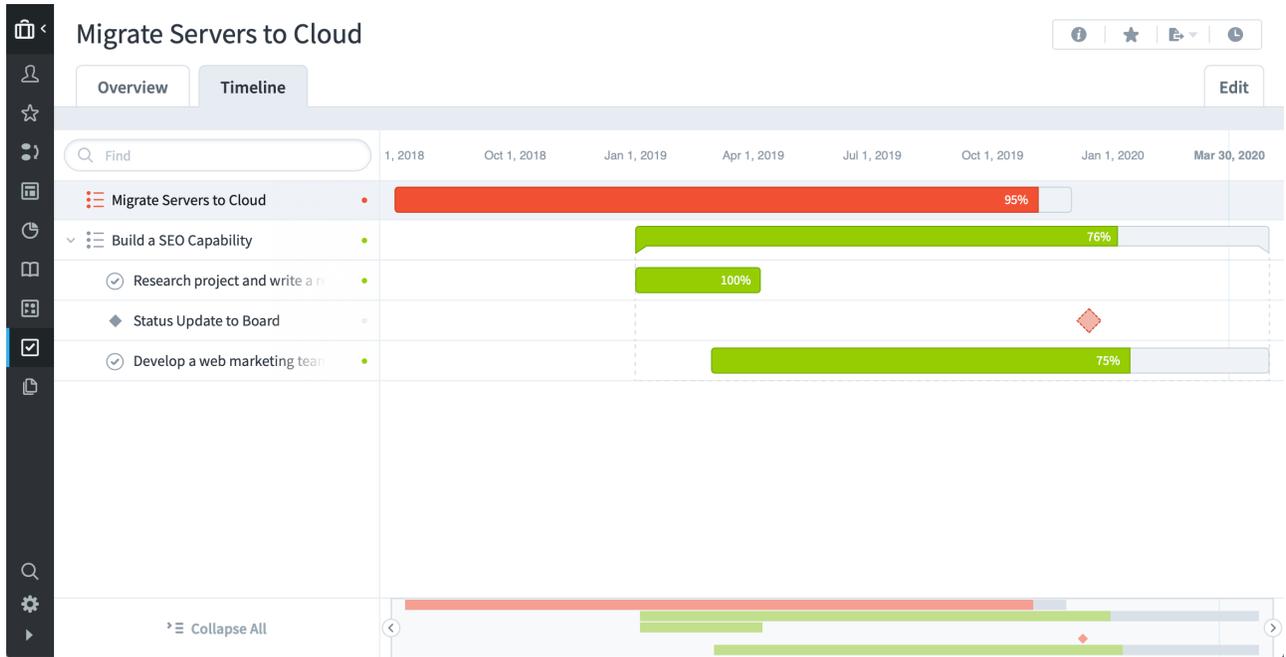
PROJECTED TOTAL BUDGET

5.2% over budget

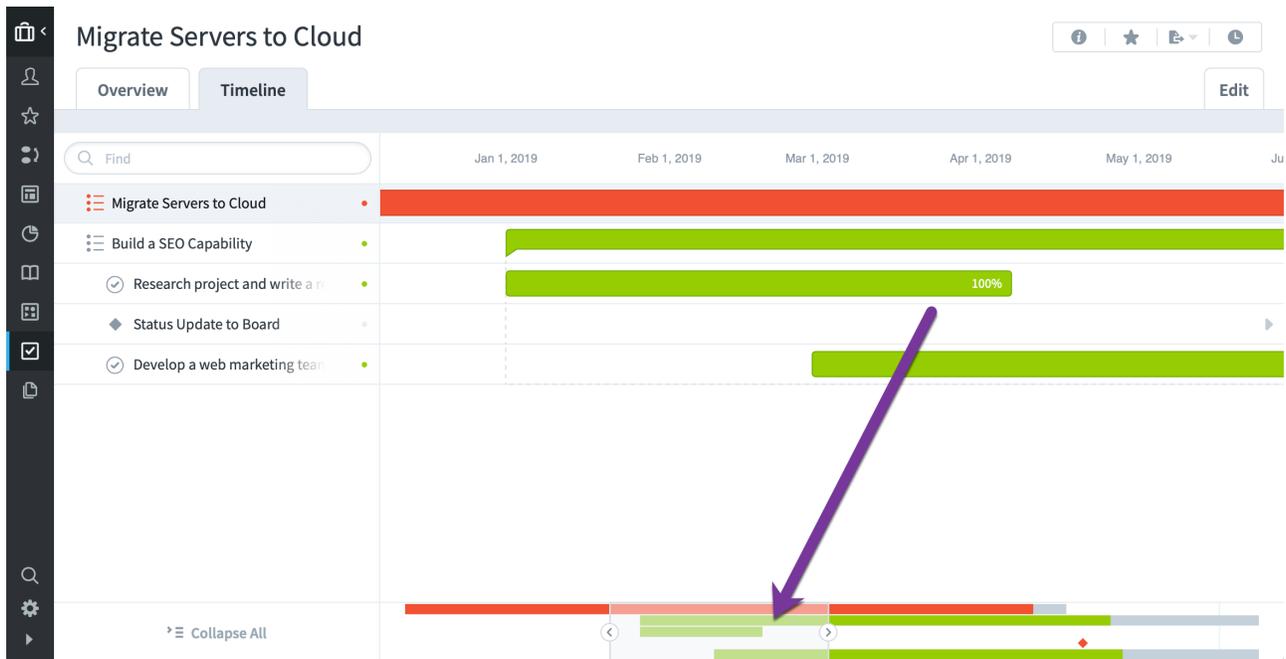
Projected Total: \$384K
Projected Variance: \$19K over budget

Timeline Tab

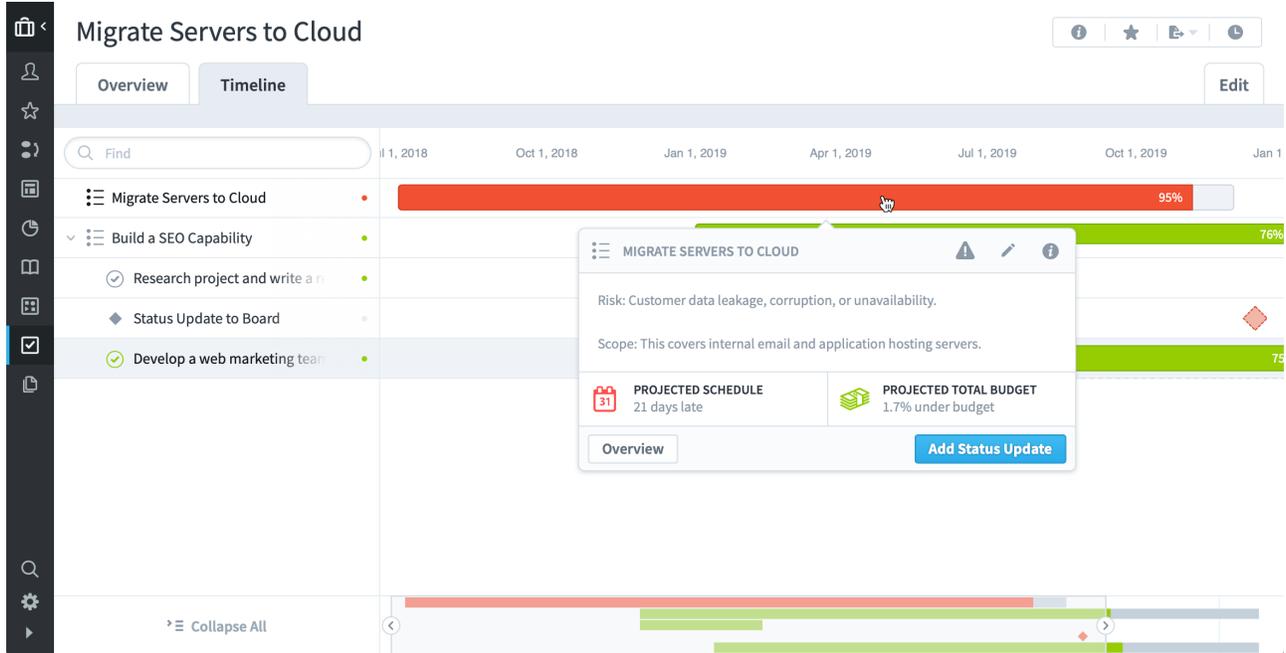
The Timeline tab shows you a fully interactive Gantt chart view of the current organization's initiatives.



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.

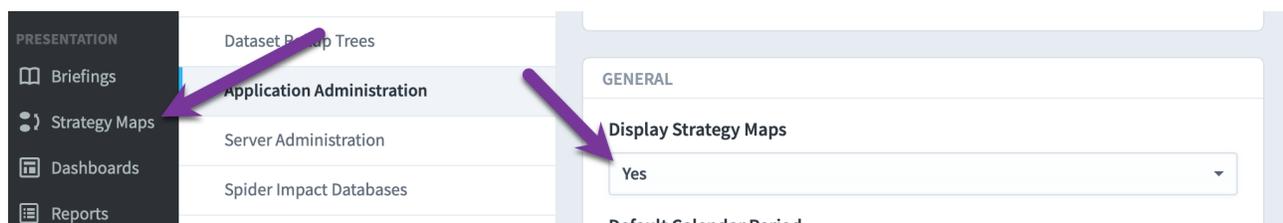


Application Administration

Choosing Terminology and Methodology

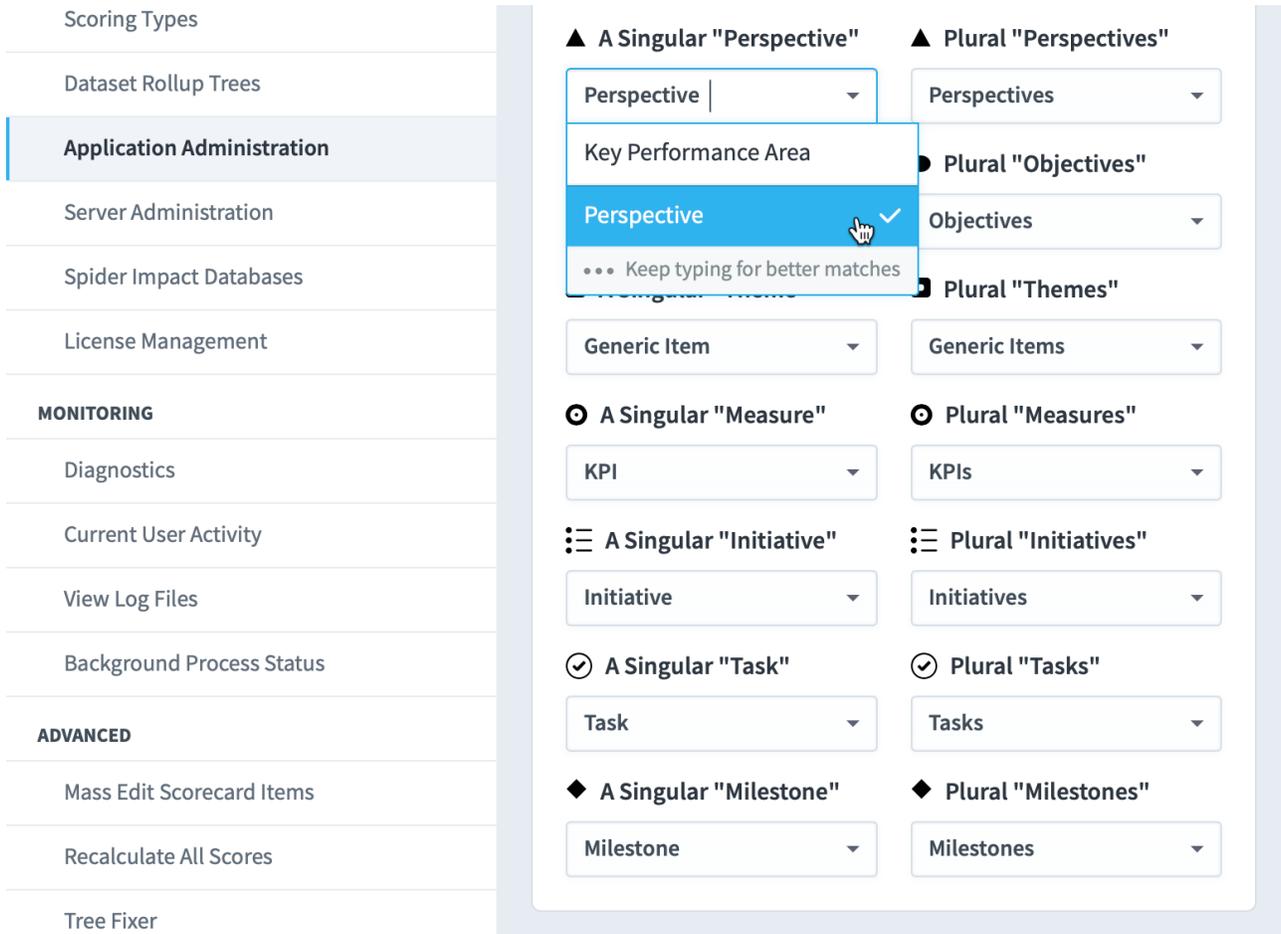
Enabling and Disabling Strategy Maps

Strategy Maps are similar to Dashboards, but they're solely focused on showing your big-picture strategy. If your organization doesn't use the balanced scorecard methodology, however, you can disable Strategy Maps in Application Administration and just use Dashboards.



Configuring Initiative and Scorecard Item Names

Many organizations have names for their performance items that differ from the standard Spider Impact defaults. You can now configure these scorecard and initiative item names in Application administration. You can choose from popular pre-defined names like "Key Performance Area" and "Perspective".



Or you can type whatever language you want. In this example we're using the term "Grouping".



Now when we create a scorecard item, it calls the object a Grouping.

The image shows a user interface for creating a scorecard item. It consists of several sections:

- Name:** A text input field containing "New Scorecard Item".
- Description:** A text area with a placeholder "Type your description here".
- OWNERS:** A section with a button labeled "Add Owner...".
- Type:** A dropdown menu that is currently open, displaying a list of options:
 - ▲ Grouping (selected, highlighted in blue with a checkmark)
 - Objective
 - Generic Item
 - KPI
 - 🔗 Linked Item

Further Language Customizations

Every phrase in Spider Impact can be replaced with wording that you choose, including translating the entire app into another language. This requires maintaining your own customer message resource file. For assistance, please contact support@spiderstrategies.com.

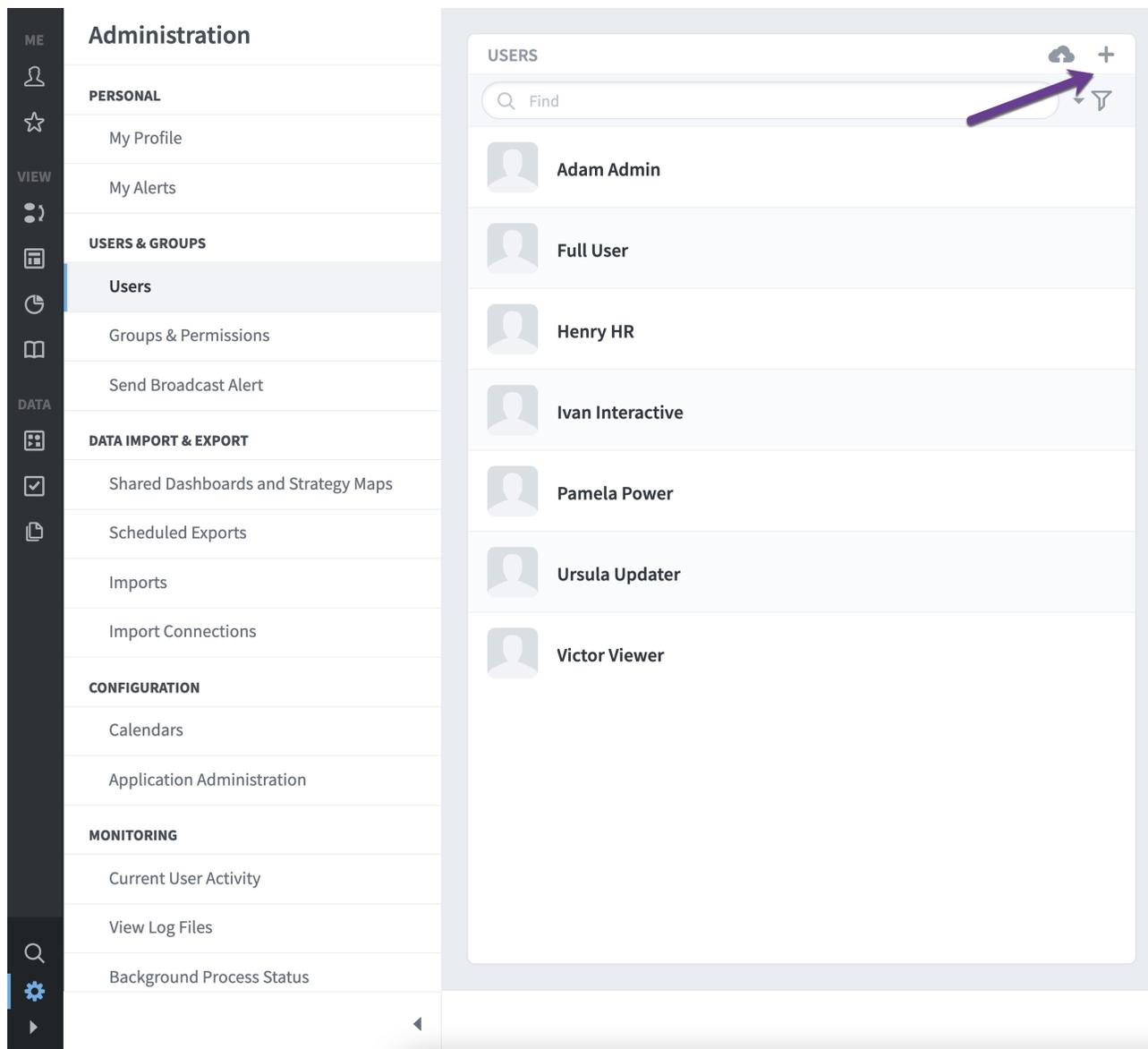
Users

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
<input type="text"/>	<input type="text"/>	<input type="text"/>

Password	Retype Password
<input type="text"/>	<input type="text"/>

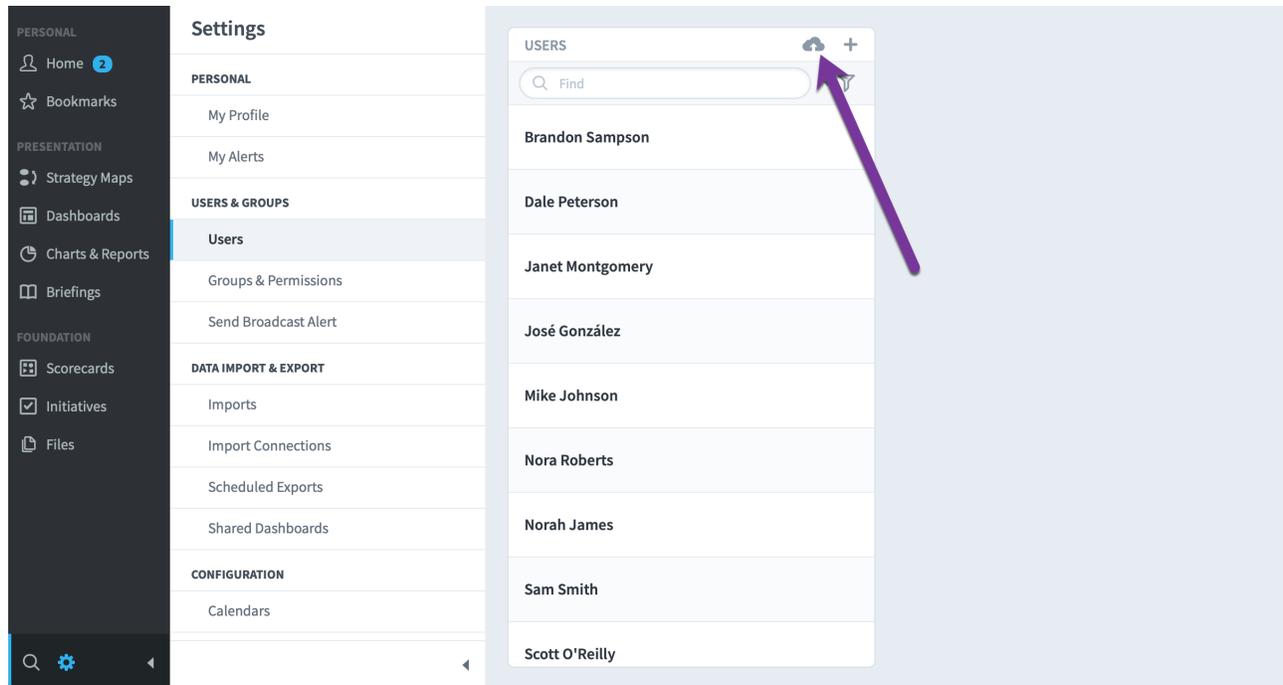
User Must Change Password On Login

MEMBER OF GROUPS (0)
Add group...

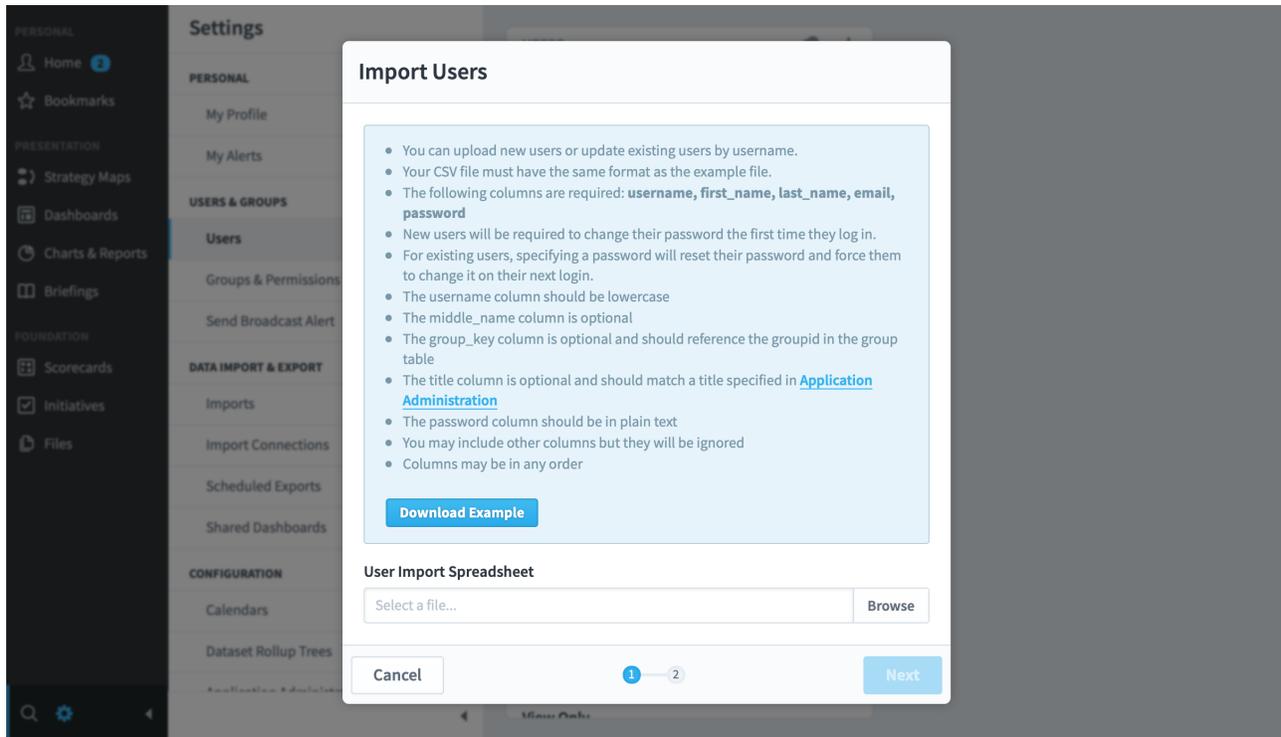
ADMIN OF GROUPS (0)
Add group...

Importing Users

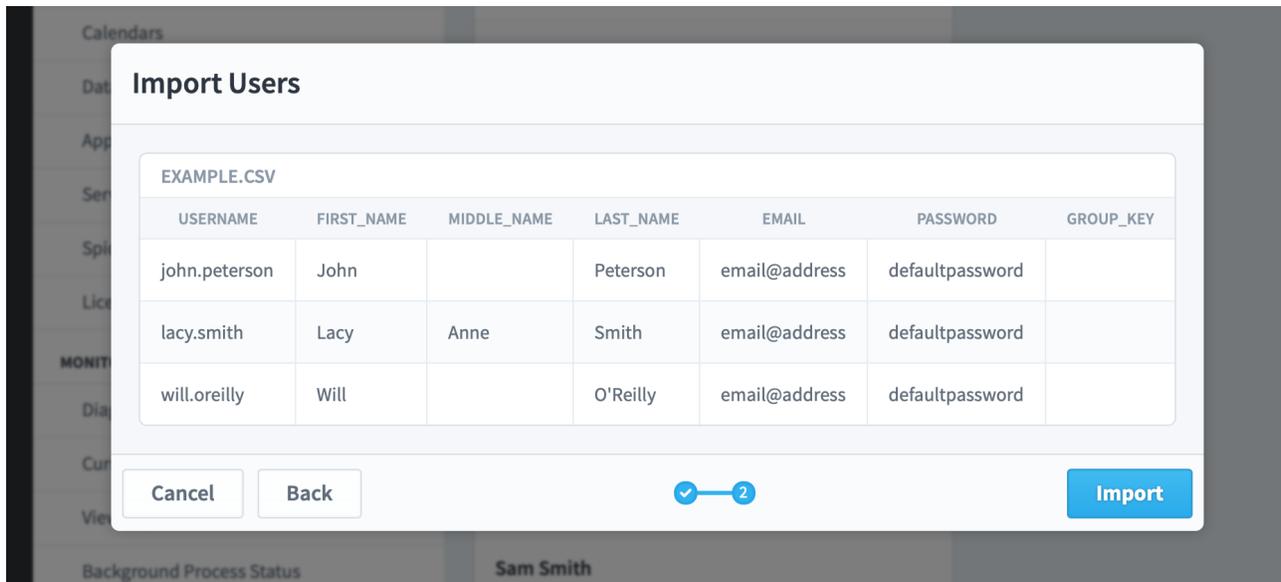
Rather than manually adding users one at a time, administrators can import multiple users at a time via spreadsheet. To start, just click on the "Import" button.



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.

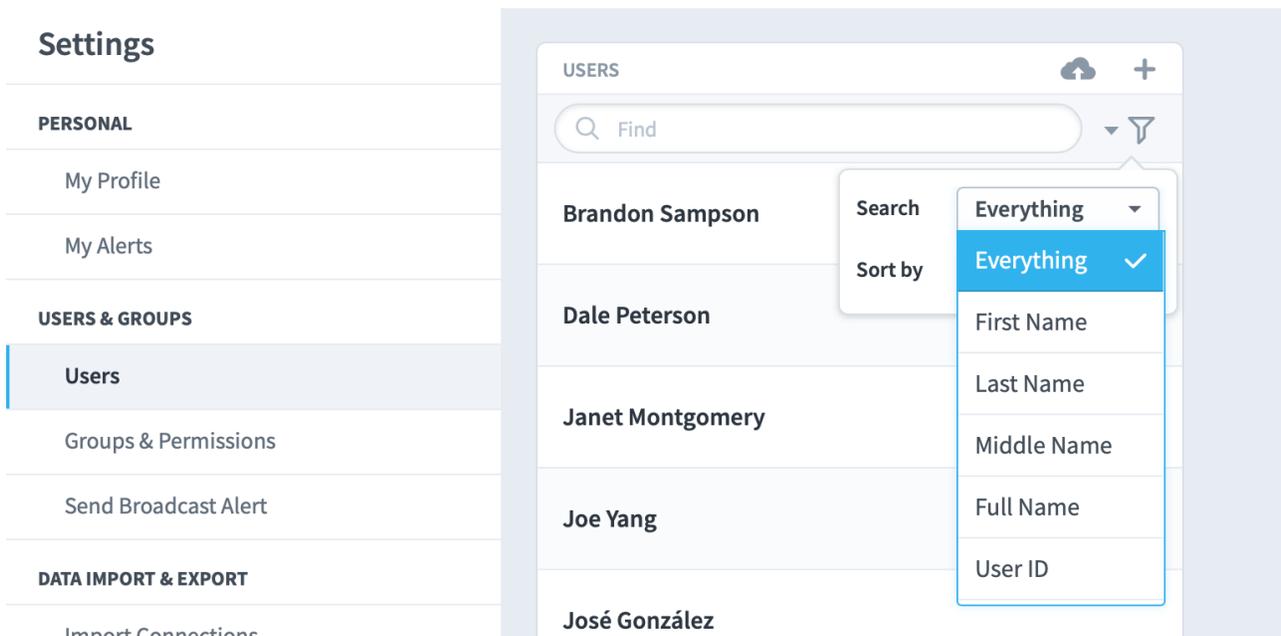


Before you run the import, you can preview your data and you will be alerted to any invalid fields. For existing users, specifying a password will reset it and force them to change it on their next login.



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 displays the Spider Impact Administration interface. On the left is a navigation sidebar with sections: ME (Profile, Alerts), VIEW (Users, Groups & Permissions, Broadcast Alert), DATA (Import & Export, Dashboards, Exports, Imports, Connections), CONFIGURATION (Calendars, Administration), and MONITORING (Activity, Log Files, Process Status). The main content area is titled 'Administration' and shows the 'Groups & Permissions' section. A modal window titled 'PERMISSIONS' is open, showing a table of groups. A purple arrow points to the '+ Add' button in the top right corner of the modal. The table lists the following groups:

Group Name	Role	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

At the bottom of the modal, there are 'Copy' and 'Delete' buttons.

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

Power Users ▼

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](#)

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

Update Users

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

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<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](#)

<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"/>		
Change Personal Profile	<input checked="" type="checkbox"/>		

View Only

View Only users can only view things in Spider Impact.

New Group: Advanced Permissions

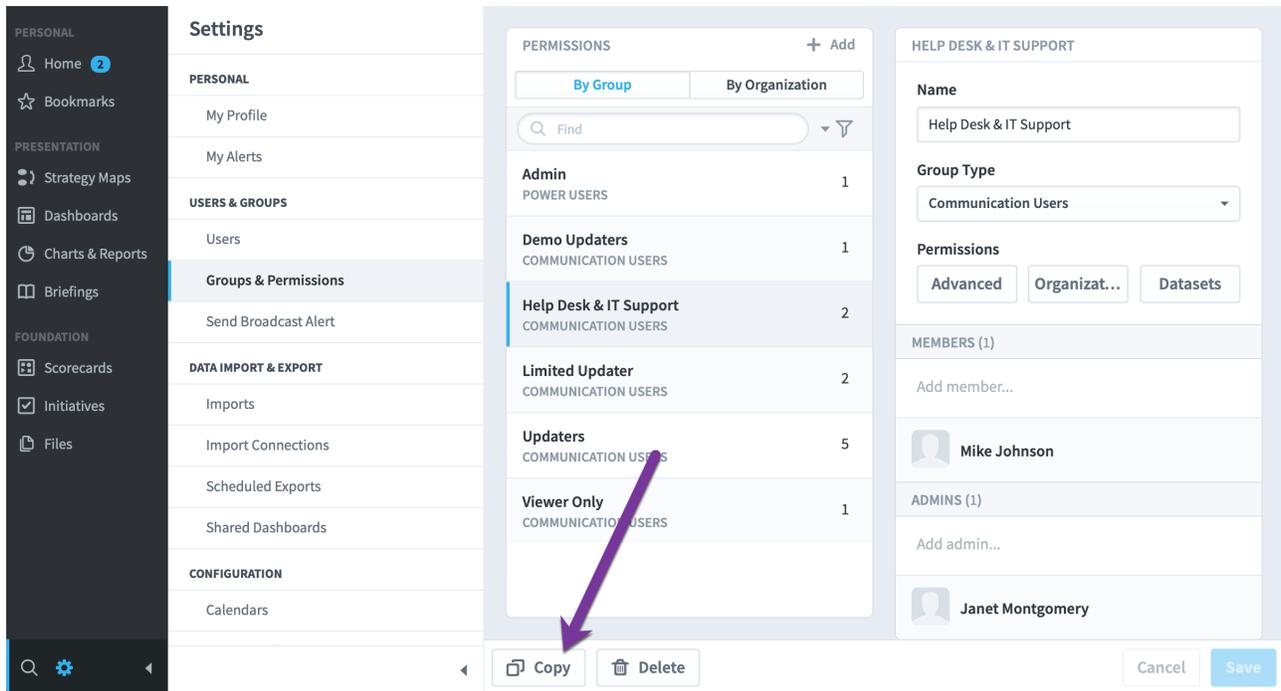
[Select default](#)

[Unselect all](#)

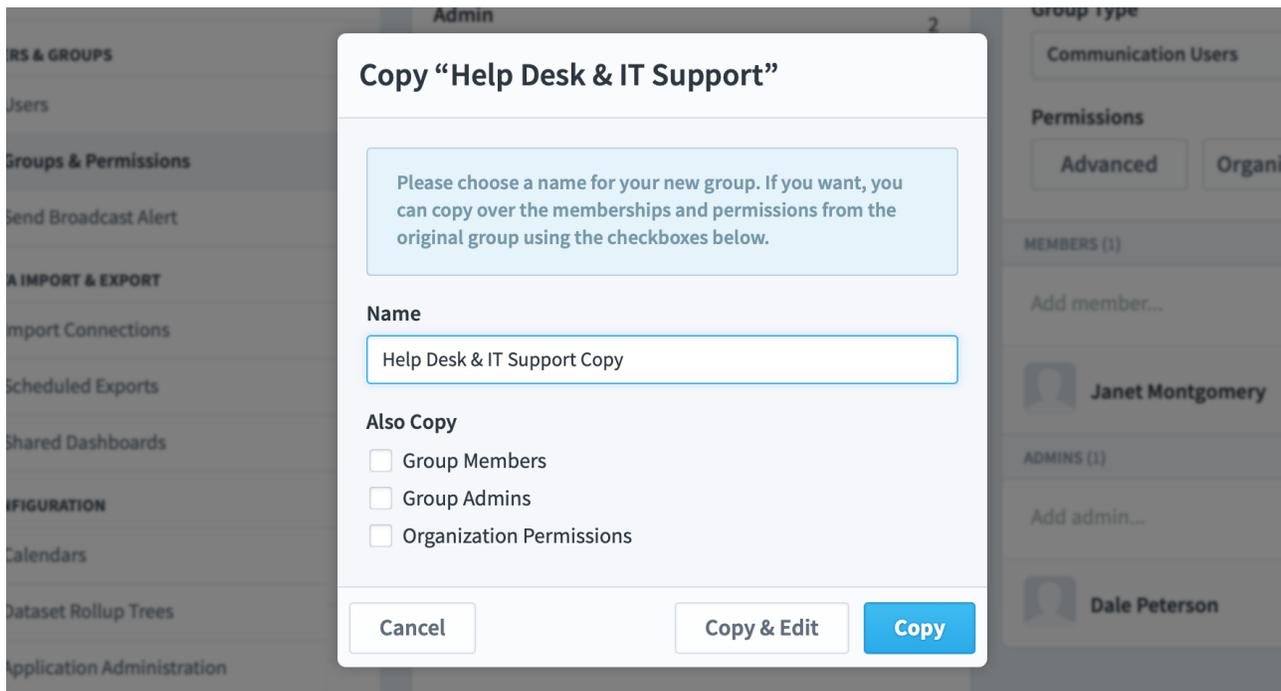
<input checked="" type="checkbox"/> VIEW	<input checked="" type="checkbox"/>
View All Organizations	<input checked="" type="checkbox"/>
Change Personal Profile	<input checked="" type="checkbox"/>

Copying Groups

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



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.

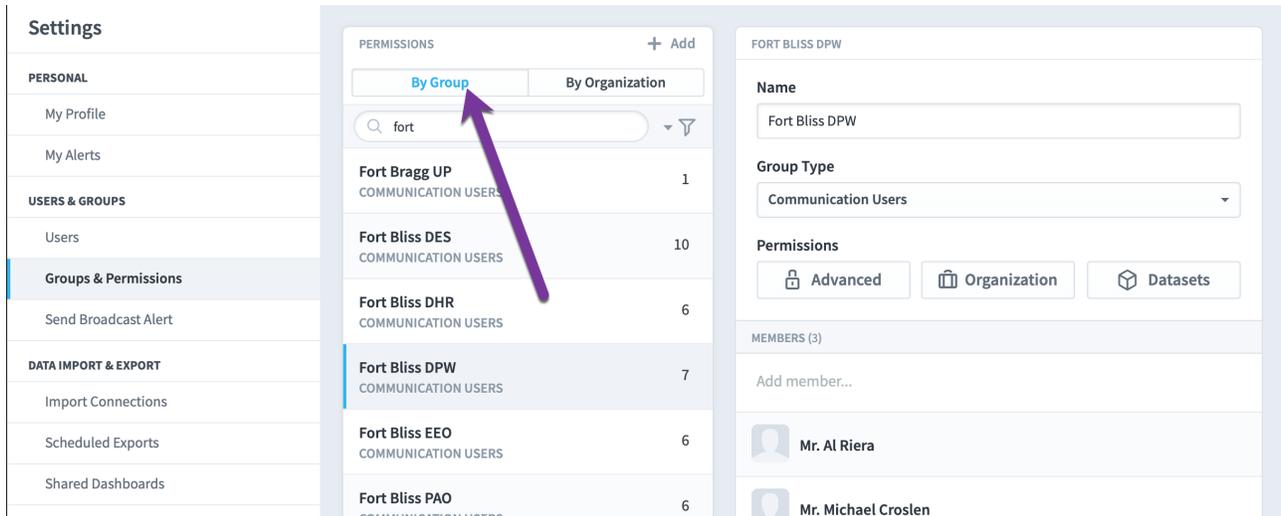
The screenshot shows the 'Administration' sidebar on the left with 'Groups & Permissions' selected. The main content area displays a 'PERMISSIONS' table with the following data:

Group Name	Role	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

A purple arrow points to the 'Delete' button at the bottom of the table.

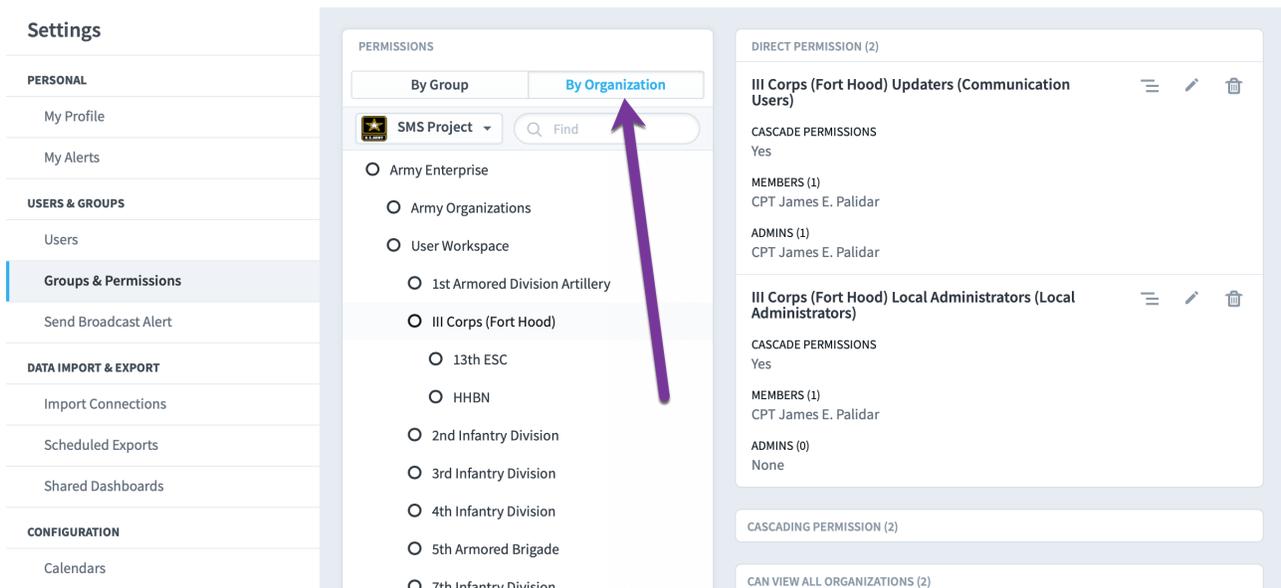
By Group vs. By Organization

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.



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

