

# **BSC Designer Online**

**Cloud-Based Balanced Scorecard  
Software**

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# Welcome to BSC Designer Online!

Training video: [Get Started with BSC Designer Online](#)

BSC Designer Online is a feature-rich web-based Balanced Scorecard software. Access it using any device with a web browser.

- [Try BSC Designer Online](#) without any limitations or obligations during the 30-day trial period. No credit card is required. Free Balanced Scorecard examples and templates will demonstrate to you all of the features and benefits of BSC Designer Online.
- If you decide to use BSC Designer Online for a longer time, the [monthly fee](#) starts at \$39.95/month for 1 power users, additional view-only users are for free.

Most companies prefer to combine BSC Designer Online and BSC Designer for Windows. Technically it is easy as all BSC Designer products use the same file format and BSC Designer for Windows can access scorecards from BSC Designer Online. Check out the comparison table to see what features you have in both editions.



**[Get start with a template.](#)** Use BSC Designer Online to follow the Balanced Scorecard approach using a real template with a strategic objectives and strategy map, not just with some KPIs. [Read more...](#)

Below is a review of the most important functions of the BSC Designer.



**[KPI Management.](#)** BSC Designer Online provides all of the means necessary for the management of KPIs. Assign value, baseline, target, add measure units and initiatives. [Read more...](#)



**[Import data for KPI.](#)** For the proper usage of the Balanced Scorecard one needs to fill it with fresh data regularly. Import your data from MS Excel or from SQL database. [Read more...](#)



**[Strategy map.](#)** Strategy maps give a big picture of where your business is moving. Create strategy maps, put on the strategy map your business objectives. [Read more...](#)



**[Reports.](#)** The visualized data gives more insights about possible improvement of the performance. Find a range of charts, diagrams and reports. [Read more...](#)



**[Cascading.](#)** Your scorecard has grown? When you need to cascade your Balanced Scorecard, organize the team work with BSC Designer Online. [Read more...](#)



**[Alerts.](#)** Need to be informed when someone adds a new action plan, adds a report or when the KPI appears in the red area? Use the alerts function of BSC Designer. [Read more...](#)



**[Sharing Balanced Scorecard.](#)** Need to share your Balanced Scorecard with colleagues, partners or show it to the World? Find flexible opportunities to share a scorecard. [Read more...](#)

How-to:

- [Work with organizational structure](#)
- [Use the Balanced Scorecard](#)

# Account Administration in BSC Designer Online

📺 Training video: [Account Administration](#)

Here is some key information about how to get started with an account in BSC Designer Online.

## Test account

Before buying any subscription we do recommend for all potential users to [test BSC Designer Online](#) during the free 30-day trial period. For the trial period we don't ask for a credit card details.

## Switching to the paid account

Once the product was carefully evaluated a user can get a quote and buy a required subscription plan using the [online price calculator](#). The calculator will ask for the required number of [power users](#) and preferred billing cycle. Once the order is finalized you will have an activation code. Follow these steps to enter it into BSC Designer Online:

1. Log into your account on [www.webbsc.com](#) (you can use your trial account or create a new one)
2. Click 'Settings' on the top, select "Subscription" tab
3. Copy into the text box the 'Credit ID' that you have (it starts with "crd-" and ends with "-kpionline")
4. Click 'Activate' button

Any time in the "[Subscription](#)" section you can check out the subscription details.

## Account backup

A security copy of the BSC Designer Online database is created regularly. You might be required by the security regulations of your company to do additional backup copies of your data. Follow these steps to do a backup of your account:

1. Login into BSC Designer online
2. Go to the "Settings" section
3. Select "[Backup](#)" tab
4. Select there "Backup scorecards and groups" to backup the data from your account, or "Restore scorecards and groups" to restore from a previously saved backup.

Please note: these additional backups need to be stored locally and are not saved on BSC Designer Online server. Additionally, you might want to turn on the [log of user activity](#) in your account.

## Changing account logo

Among the first steps after the account was created, you might want to change an account logo to the logo of your company.

1. Go to the "Settings" section
2. Select "[Logo](#)" tab
3. Click "Choose file" and then "Save" to apply changes

Click "Browse" to select a logo file and submit to finalize the process. Please note: you might want to resize your logo before uploading to fit 189x39 pixels rectangle, otherwise it might look too small/big.

## Currencies

Planning strategy for different regions might involve local currencies. To setup local currencies:

1. Go to the "Settings" section
2. Select "[Currencies](#)" tab

In the Currency tab:

- Use the "**Add**" button to add a new currencies
- Use the "**Refresh All**" button to obtain current exchange rates

- Use "**Edit**" button to edit currency exchange rate manually if required for the accounting purposes
- The currency marked as a **default** will be used as a base currency for the calculations of the totals in the Budget report

The new currencies will be available:

- For the Budget initiatives (KPIs > Initiatives > Add Initiative > Budget)
- For the Budget report (Report menu > Budget and Duration Report)
- As a measurement unit for a KPI (KPI > "Measure" drop list)

## Getting started with an account

Here are some recommended steps to get started with an account:

- Prepare an organization structure. [Learn more...](#)
- Add additional "Power" and "View-only" users. [Learn more...](#)
- Create your first scorecard from a template. [Learn more...](#)

Once you reviewed main features using example scorecards, try all the functionality on your own:

- Create new KPIs and power them with data. [Learn more...](#)
- Automatically build a strategy map. [Learn more...](#)

# Use Balanced Scorecard Template with BSC Designer

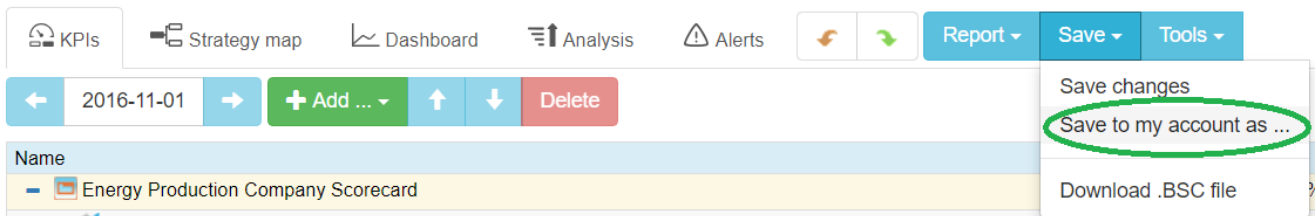
Training video: [Create Scorecard from a Template](#)

At bscdesigner.com one can find [several templates/examples](#) of the Balanced Scorecards. Most of them are available as a BSC Designer Online scorecards with shared access rights. Any prospect user of BSC Designer Online can check out the templates and start using them for his/her own scorecard.

## Copying a template to your account

Here are the steps to copy a template into your account at BSC Designer Online:

1. Log into your account. If you don't have one, create a [free test account](#) (no credit card is required to try it)
2. Choose [one of the templates](#), and open a template in BSC Designer Online format, for example, this might be [Marketing Scorecard](#) template
3. Wait a few seconds until BSC Designer Online loads all the data
4. Choose "Save to my account as..." option located in "Save" menu (make sure you have logged into BSC Designer Online first, otherwise you won't see "Save to my account as..." option):

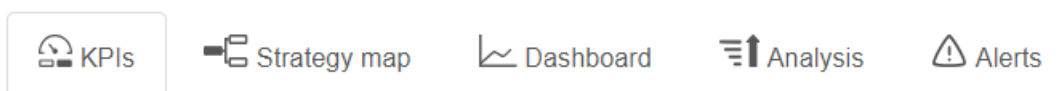


5. Select a name for a new scorecard and click the "Save" button
6. Go to "My Scorecards" section and make sure that the new scorecard is now in your account

## Review and customize a template

The template is now in your account. Now it's time to review what you have and customize it according to your needs.

1. Go to "My Scorecards" section and click on the scorecard to open it, wait until BSC Designer Online loads all the data
2. You will see the interface of BSC Designer Online and its main toolbar:



3. Click on the "KPIs" tab to review the KPIs that exist in the scorecard; with this tab you can:
  - Modify existing KPIs or create new ones
  - Enter performance data into the KPIs
  - Align initiatives with KPIs
  - Create a link to the KPIs in other scorecards
  - Learn more about [working with KPIs](#).
4. Finally, switch to the "Strategy map" tab, here:
  - You can see a "big picture" of your business strategy
  - Business goals, KPIs, initiatives, and the cause-and-effect logic is represented visually
  - Learn more about [working with Strategy Maps](#).

The scorecard is ready, feel free to add more KPIs, business goals, build your own [dashboard](#), or set up [alerts](#). Check out "[Get Started](#)" in the user manual for more information.

# Align business scorecard with organizational structure

Training video: [Organize Scorecards into Groups](#)

BSC Designer Online allows presenting the structure of an organization, and locate scorecards respectively.

Open scorecard Download scorecard Edit properties Share Delete scorecard

-  My organization	
-  Examples	Some examples of the KPI and Balanced Scorecard to get started
-  CEO	Scorecards for CEO and top managers
CEO Balanced Scorecard	80% An example of a Balanced Scorecard that CEOs can include general objectives and KPIs, feel free to customize it according

In the organization structure one can:

- Create and manage organizational groups
- Create and manage scorecards
- Add new users, assign them to the groups

## Access rights for users

Placing a user into a certain organization group will allow the user to view the scorecards that belong to that group only. User "[Sharing](#)" function when you need to allow users from different department to be able to work with the scorecards of other departments.

## Customize charts on the organizational structure

The charts on the organizational structure correspond to the performance indicator aligned with the root business goal of the respective scorecards. If there are no KPIs aligned with the root business goal, then the total performance of the scorecard (root element on KPI tab) will be visualized.

Follow these steps to change the data that is visualized on the organizational structure for a scorecard:

1. Open a scorecard
2. Go to the "Business goals" tab
3. Select root element (named "Balanced Scorecard" by default)
4. Click on "Link KPI" button
5. Select the indicator that you want to display in the organizational structure
6. Aligned indicator will appear under the business goal; click on it to customize Glyphs used
7. Save the scorecard and refresh the page with the organizational structure



# Managing Users in BSC Designer Online

Training video: [Managing Users](#)

BSC Designer Online was created as a multi-user platform.

## Power and view-only users

An administrator can add additional "Power" or "View-Only" users to the BSC Designer account:

- **Power** users can access and modify scorecards, enter a new data into KPIs, while
- **View-Only** users can only view data that was already entered by other users and access dashboards and strategy maps that already exist in the scorecard.

The number of power users depends on the subscription that was bought. Check out the number of power users allowed in your account in "[Subscription](#)" section.

## Adding users

To add additional users to an account:

1. Go to the "[Users](#)" section
2. Click the "**Add user**" button
3. Enter required details:

### User

<b>Name</b>	<input type="text" value="Alex Savkin"/>
<b>Password</b>	<input type="password" value="Password"/>
<b>Confirm password</b>	<input type="password" value="Confirm password"/>
<b>Email</b>	<input type="text" value="savkin@kilonik.com"/>
<b>Type</b>	<input type="text" value="Power user"/>
<input checked="" type="checkbox"/> Enabled	
<input type="checkbox"/> Subscribe to newsletter	
<input type="button" value="Save"/>	

4. Press "Save" button

## Access rights

The access rights of the user depend on where this user is placed in the [organizational structure](#). For example, a user that is placed in the "HR" department will be able to access only the scorecards of the "HR" department. It is possible to give a user an additional access to any scorecard and/or specific indicator. This is discussed in "[Sharing](#)" section of this manual.

## User logs

Security regulations in some companies require the software to log the activity of all users. BSC Designer Online allows the administrator to turn logging function on:

1. Go to the "[Users](#)" section
2. Click the "**Logs**" button
3. Click the "**Settings**" button
4. Select events that you need to log and click "enable logs."
5. The logs will be displayed in the [Logs section](#).

# Share scorecard and/or KPIs with BSC Designer Online

Training video: [Share Scorecard and KPIs](#)

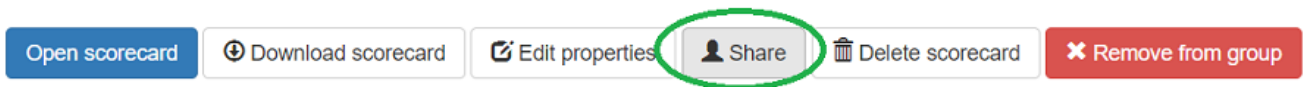
In BSC Designer Online it is possible to give user an access to:

- The scorecards of selected group,
- Specific scorecard, or
- Specific indicators in specific scorecard

## Adding access rights

Follow these steps to give a user a new access rights.

1. Go to the "My Scorecards"
2. Select the group or the scorecard that you want to work with
3. Click on the "Share" button on the toolbar:



4. On the "Share" page select the rights that you want to assign to the user and click on the "Next" button.
5. Find the user that you want to work with. Next to the user's name find the type of the access that you want to give to the user and click on the "Grant" button.

Users who have an access to this scorecard will now see it in their account in an organizational structure.

## Revoke access rights

To revoke access rights follow the steps 1-3 as described above.

1. Go to the "Active permissions" tab
2. Next to the user's name press the "Revoke" button

## Public access

With BSC Designer Online you can make a public scorecard. To give public access on the step 5 find "Public user" and give that user required rights.

## Access by email

In some cases you might want to give an access to the person who is registered with BSC Designer Online, but is not linked to your account. In this case on the step 5 use section "Grant rights for email", and specify the email of the person.

## Cascading/alignment with BSC Designer Online

Training video: [Cascading by Goals and KPIs](#)

To ensure efficient and effective strategy execution company departments need to know how their goals support the goals of other departments, and/or how the KPIs from different levels are affect each other. Here are the steps to link two scorecards:

1. Make sure you have two scorecards ("Parent" and "Child") in your account and those scorecards have some KPIs
2. Open "Parent" scorecard
3. Go to the KPIs tab
4. Click "Add..." button and select "New Imported Indicator" option
5. In the "Source document" drop list select "Child" document:

### Imported item properties

#### Source

- Another scorecard  
 Current scorecard

[My organization] ▼

#### Item for import

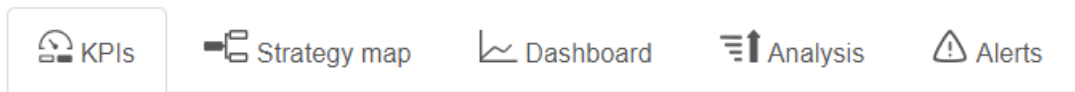


6. In the "Item for Import" drop list select a KPI that you want to link to
7. Click "OK" to close the dialog
8. A new KPI will appear, the value of that KPI will be linked to the value of the "Child" scorecard

# KPIs in BSC Designer Online

Training video: [Setup KPIs Step-by-Step](#)

BSC Designer Online provides a wide range of means for managing of KPIs. In the BSC Designer Online you have a "KPIs" tab where you can add all of your performance indicators.



## Creating a new KPI

Select an indicator that will be a container for a new KPI. Use "Add..." button on the toolbar to create a new indicator. The software will show several options:

- **New indicator** - create a new indicator with data entered manually, [via Excel](#), or via formula.
- **New imported indicator** - create indicator linked to another indicator
- **New WebSQL indicator** - create indicator that is powered by external [SQL data source](#)

## The properties of an indicator

Select any indicator in the list of KPIs. The software will display properties of the indicator below.



### General tab:

- **Name.** The name of the KPI. Try to keep it short and meaningful, don't overload it with details, and put the details into the description field.
- **Icon.** Next to the "Name" field there is KPI's icon. You can change it by clicking on the icon image.
- **Description.** The description field is for additional information about the KPI; it might be information about the measurement method.
- **Measure.** Use this list to choose one of measurement units that is applicable to the KPI. If there is no measure that fits your needs click the button on the right from the "Measure" drop list to add a new measure.

### Data tab:

- **Value.** The value field displays the current value of the KPI for the date selected in the calendar. The button next to the "Value" field allows to create indicators with custom formulas.
- **Max** and **Min** values determine the minimum and maximum possible range for a value. Whereas **baseline** and **target** values show your working interval. Normally a baseline is a starting value and the target is a value that you wish to achieve.
- **Simple input mode.** For some indicators the Baseline is always equal to Min value and the Target is always equal to Max value. Check this checkbox and the software will show only the baseline and target fields.

### Performance tab:

- **Weight.** The relative weight of the indicator shows how this indicator is important compared to other indicators in the same container. The weight is taken into account when the performance of the container is calculated.
- **Optimization.** What do you want to do with the value of a KPI? Would you like to minimize it (for example like a turnover of employees in a company) or you'd like to maximize it (for example profit value). Choose the appropriate optimization. If the dependency is not as simple as just a line function, you can enter a custom formula into BSC Designer Online that the program will use to calculate your performance and progress. To do this click on the "Edit" button next to the "Optimization" drop list.
- **Raw data indicator.** Some indicators on the scorecard are just data storages that are not supposed to have a performance or a progress. Check this checkbox and BSC Designer won't take this indicator into account when calculating the performance of the

scorecard.

Name	Initiative	Performance	Progress
CEO Balanced Scorecard		85.17%	86.17%
Financial Perspective	Update monthly on day 1	106.25%	106.25%
Revenue growth, %	Update monthly on day 1	106.25%	106.25%
Customer Perspective	Update monthly on day 1	71%	71%
Customer satisfaction index	Update monthly on day 1	71%	71%

Respectively to the max/min pair the **performance** of the KPI is calculated using the formula:  $Performance = (Value - mn) / (mx - mn)$ . Respectively to the baselines/target pair the progress of the KPI is calculated:  $Progress = (Value - Baseline) / (Target - Baseline)$ .

**Context** tab:

- **Indicator type.** The type of indicator is defined in the context of its container. **Lagging** indicators contribute to the calculation of higher level items. **Leading** indicators are used for local calculations only.
- **Glyph 1** and **Glyph 2.** Glyph settings for the indicator on the strategy map.

## Initiatives

Name	Initiatives	Performance
Profitability, %		60%
New indicator	Update monthly on day 1	60%

In the list of KPIs, there is a column "Initiatives." Click on the button in this column to access initiatives for the KPI. Initiatives for the KPIs have the following properties:

- **Name** of the initiative.
- **Description** for the initiative; it can also be assigned to a specific date.
- **Duration** and **Budget** are useful when you need to specify time and finance resources.
- **Person responsible** option allows to specify the person who will receive email notifications about this indicator. This person should be registered as a user of BSC Designer Online under your account.
- **Document list** - here you can add a link to any document with a detailed action plan. Normally users put a link here to a Word document located in some online file storage, such as Dropbox or a Google Drive.

## Update interval

For any KPI on the scorecard an update interval can be adjusted:

1. Open any scorecard and go to the KPIs tab
2. Select a KPI
3. Select "KPI Update Interval" command in "Tools" menu
4. Update interval dialog will appear:

**Update interval type**

Monthly on 2017-10-01 day 1

Permit input only for update dates

Current indicator

Select indicators

Customer satisfaction index

OK Close

5. Select required update interval and click "OK"

Practical tips:

- In the "Update Interval" dialog you can use the "Select indicators" option to change update interval for many indicators at once.
- It is possible to change the update interval that the software use by default for the new indicators, do this via menu "Tools" > "Default KPI update interval"

## Manual data entry

To enter data manually follow these steps:

- Select or create any indicator
- If needed change an update interval as described above
- Select appropriate date in the calendar
- Enter a new numeric value into the "Value" field

Alternatively, you can select any indicator and click onto the "Values Editor" button on the toolbar.

## Value inheritance

Value inheritance defines whether the software will use previous values for the new dates, or if it will use only entered values.

For example: there is a value of 21% for a KPI for September 1. Then user selects September 5th in the calendar.

- If the **inheritance is active** the software will display 21% as a value for September 5, and will calculate the performance;
- If the **inheritance is disabled** the software won't display any data for September 5, and won't calculate the performance;

To adjust inheritance settings:

- For specific indicators: select an indicator, click onto the "Values Editor" button on the toolbar, use the "Values inheritance" option.
- For global settings: select "Values inheritance" in "Tools" menu.

## Data grouping

BSC Designer allows grouping data by time periods. The way the software groups the data is defined individually for each indicator via the **Group by** option. To adjust the "Group by" option:

1. Select an indicator
2. Click onto the "Values Editor" button on the toolbar
3. Use the "Group by" drop list.

## Stop-lights

Stop-lights are cycles of different colors that are displayed next to the performance and progress values. The stop-lights help to quickly identify the state of the indicators. Stop-light colors can be customized for an indicator:

1. Open a scorecard in BSC Designer Online
2. Go to the KPIs tab and select an indicator
3. Select "Stop-lights" settings in "Tools" menu
4. Enter new values for the stop-lights, check "Enabled" checkbox and click "OK":

### Custom stop lights

Enabled

Red	20	%	20
Orange	40	%	40
Lime	60	%	60
Green	80	%	80

OK Cancel

## Containers for KPIs

Any indicator that contains other indicators inside becomes a "container" in BSC Designer.

## Creating containers

To create a container:

- Select an indicator and create a new indicator inside using the "Add..." button on the toolbar. The selected indicator will become a container.
- Drag and drop to place any existing indicator into another indicator, and the target indicator will become a container.

## Container settings

Choose any container indicator to display its properties. Most of the settings will be exactly the same as for the KPI, but there are two properties specific for a container:

The screenshot shows a settings panel with four tabs: General, Data, Performance, and Context. The 'Performance' tab is selected. Below the tabs, the text 'Performance: Weighted average' is displayed, with 'Weighted average' circled in green. Underneath, the label 'Weight, %' is followed by a text input field containing the number '1'. At the bottom, there is a checkbox labeled 'Raw data indicator' which is currently unchecked.

- **Performance** - use this property to tell the software how the "Performance" of the container should be calculated.

The screenshot shows a settings panel with four tabs: General, Data, Performance, and Context. The 'Data' tab is selected. Below the tabs, the text 'Value: Weighted average' is displayed, with 'Weighted average' circled in green. Underneath, the label 'Value' is followed by a text input field containing the number '1' and a small edit icon (a square with a pencil). At the bottom, there is a checkbox labeled 'Simple input mode' which is currently unchecked.

- **Value** - use this property to tell the software how the "Value" of the container should be calculated.

The following options are available for the "Performance:"

- **Weighted average** - the performance of the container will be calculated as an average of the performance values of the contained KPIs taking into account their weight.
- **Average** - the performance of the container will be calculated as an average of the performance values of the contained KPIs
- **Max, Min** - the software will find the max (or min) performance of the contained KPIs and will use it for the performance of the container
- **Sum** - the performance of the container will be calculated as a sum of the performance values of the contained KPIs
- **Self-standing** - the performance values of the contained indicators won't be taken into account; the performance of the container will be calculated using its own value, min, and max values

The following options are available for the "Value":

- **Weighted average** - the value of the container will be calculated as an average of the values of the contained KPIs taking into account their weight.
- **Average** - the value of the container will be calculated as an average of the values of the contained KPIs

- **Max, Min** - the software will find the max (or min) value of the contained KPIs and will use it for the value of the container
- **Sum** - the value of the container will be calculated as a sum of the values of the contained KPIs
- **Self-standing** - the values of the contained indicators won't be taken into account; the value of the container will be entered manually by user
- **Performance** - the software will use the performance of the container for its value field



# Get Your Data into the Balanced Scorecard from Excel Spreadsheet

Training video: [Import Data from Excel](#)

With BSC Designer Online you can access business information from several data sources, including Excel Spreadsheet and SQL database.

## Import from MS Excel Spreadsheet

1. Go to your account in BSC Designer Online. Open a scorecard where you want to import some data.
2. Go to the "KPIs" tab.
3. Click on a "Tools" menu, select "Import Indicator Values" option.
4. Select "Import from MS Excel document". Optional: reuse previously saved import profiles from the "Load settings from profile:" drop list.
5. Click the "Next" button.

**Data import wizard**

Import from MS Excel document  
 Import from text  
 Import from SQL database

Load settings from profile:  
-

6. Upload MS Excel file or select one uploaded before. You can use this [example Excel project](#).
7. The name of the uploaded file will be displayed, click the "Next" button.

**Data import wizard**

test-book.xlsx

8. BSC Designer reads the file and shows the list of available spreadsheets. Choose a spreadsheet from the list and click the "Next" button.

**Data import wizard**

Available sheets  
KPIValueTable1

	Name	2013-03-01	2013-06-01	2013-09-01
	KPI1	12	14	10
	KPI2	41	58	61
	KPI3	23	22	21

9. On the next step mark the column that contains values, the column that contains dates, the column that contains target values (if any), and so on.

10. Click the "Next" button to preview the results.

11. To reuse this import profile later check the "Save settings as ..." check box. Click the "Finish" button to finalize data import.

## Troubleshooting

- **Date is not recognized.** Dates might be represented in PC using different formats like yyyy-MM-dd (2016-10-23) or dd MMM yy (23 Oct 16). BSC Designer is able to recognize most formats, but sometimes you might need to specify date format manually. To do this use the "Date format" drop list. Use one of predefined formats; advanced users might want to define their own format ([format guidance](#)).
- **I'm using import profile and the data is not correct.** Most likely you have updated the structure of your Excel Spreadsheet, so BSC Designer cannot recognize columns and rows according to the information saved in a profile. Do a manual import once again and create a new import profile.
- **I see data on preview step but I don't see it on KPIs tab.** If the data was displayed correctly on the "preview" step it means that BSC Designer has recognized the data and its formats. Make sure that when you are searching for the data on KPIs tab and that you choose a correct KPI and a correct date in the calendar.

# Using SQL database as a data source for the indicators

Training video: [Use of the SQL indicators](#)

With BSC Designer Online you can use an external database as a data source for your KPIs. SQL Indicators work in both - BSC Designer Online and BSC Designer Server.

## Setup SQL indicator

1. Open a scorecard, go to the "KPIs" tab.
2. Select "New WebSQL Indicator" in "Add..." menu.
3. Enter **server** name. For a locally installed BSC Designer the server name will most likely be **localhost**
4. Enter **port** number. For a locally installed MySQL database the default port number is 3306.

Connected successfully. ✕

### Connection settings

---

Database type

Server  Port

Database name

---

Login  Password

---

Connection string

---

5. Enter database name, access login, and password. Click the "Next" button.
6. Formulate required SQL query (see some examples below).
7. Click on the "Next" button to preview the results. Click on the "Finish" button.

## Examples of SQL queries

BSC Designer expects to receive one value as a response to the SQL query. The received data will be used for the **Value** field of the indicator.

Supported parameters:

- **%%UpdatePeriodStart%%** and **%%UpdatePeriodEnd%%** - respective starting date of the update interval and ending date
- **%%ItemName%%** - the name of the KPI as specified in the **Name** field
- **%%date%%** - current date selected in the calendar in BSC Designer

Case 1: Indicator is updated daily. There is one value for each date.

```
select value from datatable where date = %%date%%
```

Case 2 (most used): Indicator is updated monthly. There are several values for this period in the database that need to be summarized.

```
select sum(value) from datatable where date between %%UpdatePeriodStart%% and %%UpdatePeriodEnd%%
```

## Updating data

There are several ways to update data for SQL indicators:

- **Click on any date in the calendar** - BSC Designer will try to read data for that day; these requests are cached on the level of web browser session.
- **Manual update** - if you need to refresh data for certain date, use **Refresh imported** option in Tools menu
- **Specify update interval** - specify an [update interval](#) for an indicator. BSC Designer will update SQL indicator automatically using specified schedule.

# Automate Expert Surveys with Data Series Function

Training video: [Surveys and Assessments with Data Series](#)

In some cases, it is hard to get a quantification of a business goal's performance. For example, it's hard to say if a proposed innovation idea is good enough, and how it compares to the alternatives. In those cases, a solution is to survey several experts and use the average of their opinions as an estimated value for the indicator. Data Series function in BSC Designer will help to keep track of such surveys.

	Is innovation saleable?	Is innovation connected to the business strategy?	Customers interviewed	
Expert 1	80	91	2	Active
Expert 2	89	81	3	Active
Expert 3	89	81	1	Active
<b>Group result</b>	86	84.333	6	Active

## Enable data series

To enable data series in BSC Designer Online:

1. Open any scorecard
2. Select indicator that you want to use in the data series
3. Select "Enable series" command in "Tools" menu

A new tab "Data series" will appear.

## Groups of data series

Data series can be organized into groups.

- By default there is just one group
- Use "+" button to add more groups

For example: use "Innovation analysis" as a group name.

## Adding evaluation parameters

Survey questions or evaluation parameters are the indicators from a scorecard. Follow these steps to add a new indicator to the data series group:

1. Select required group in the "Active group" drop list
2. Click on "Add KPI" button (a blue button located on the right)
3. Select some of the indicators from your scorecard and click OK

A new indicator will appear as a new column name.

## Adding data series

Data series can be the name of experts that will participate in the survey. To add a new data series:

1. Select required group in the "Active group" drop list
2. Click on "Add series" button
3. Enter a new series name (for example, expert's name)

A new data series will appear as a new row name.

## Entering data

Use the data series table to enter performance data.

1. Locate a required data series row (a required expert name)
2. Locate a required KPI (a question that you ask to the expert)
3. Enter the value into the cell (the value is expert's opinion about the asked question)

Another way to enter data:

1. Make data series active (as described below)
2. Go to the KPIs tab and select appropriate indicator
3. Enter the data in this indicator

Go back to the Data Series tab to make sure that the data was entered properly.

## Time points are supported

Indicators used in the Data Series are normal indicators of BSC Designer with all of their properties, including time points.

For example: It is possible to capture the survey results for different days and later analyze how the survey score was changing over time.

## Calculating group results

The group results for all KPIs will be displayed in the last row.

The data for the group results is calculated using the KPIs' values and their grouping type. You can use KPIs with different grouping type (e.g. average, sum, min, max).

## Data shown in the value field

The last column of the Data Series table contains several buttons with caption "Active."

- The green button means that this data series is active
- The gray button means that the data series is not active
- To activate data series click on the corresponding gray button "Active"

The value for the **active** data series will be visualized:

- In the "value" field for the KPIs that were used in the data series
- In the performance reports

# RESTFul API for BSC Designer Online

For easier automation of data entry and integration with 3rd party tools BSC Designer Online provides RESTFul API.

## General information

- **Documentation.** The documentation for the API calls is [available here](#).
- **Limitations.** API can be used only by the owner of the account. An account has a limit of 100 API calls per hour per power user.

## Getting started

Find below some instructions that will help to get started.

## Authorization token

Before submitting API calls an authorization token need to be obtained. Send the following data to the [login endpoint](#):

```
POST /rest/login HTTP/1.1  
  
Host: https://www.webbsc.com  
  
Content-Type: application/json  
  
{  
  "email": "replace_with_access_email_here",  
  "password": "replace_with_access_password_here"  
}
```

the response in JSON format will contain **errorMessage** and **token** parameters:

```
{  
  "email": "string",  
  "errorMessage": "string",  
  "success": true,  
  "token": "string"  
}
```

Use obtained **token** parameter in the headers of all other calls to the API:

```
POST /rest/login HTTP/1.1  
  
Host: https://www.webbsc.com  
  
Content-Type: application/json  
  
Token: replace_with_obtained_token
```

## Getting IDs for scorecard and KPI

API calls related to the KPI require the ID of the scorecard and the GUID of the KPI.

## Getting Scorecard ID

Scorecard ID can be found using [API call](#) or manually. To find Scorecard ID manually:

1. Go to the "[My scorecards](#)" section
2. Open the target scorecard
3. The URL of the scorecard will be something like this: <https://www.webbsc.com/s/123456>
4. The number at the end is the ID of the scorecard

## Getting KPI GUID

KPI GUID can be found using [API call](#) or manually. To find GUID manually:

1. Open scorecard
2. Select "Tools" > "Export indicator values"
3. Follow the steps to get to the "Preview export results" page
4. "GUID" column in the preview table will contain GUID of the KPI

## Writing and Reading value using API

Use [KPI Value Controller](#) to write and read data for the KPIs.

- Remember to use **token** in the header of the requests
- Dates should be in the **yyy-MM-dd** format (for example "2017-06-30")
- Data is sent and received in JSON format
- To optimize call numbers use batch calls
- To read grouped, calculated, or inherited values use [Grouped Values Controller](#)

Check out the [php example](#) of using API.



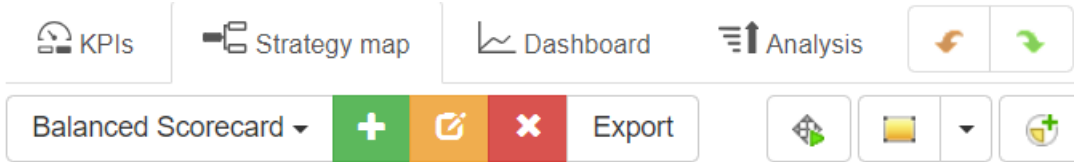
# Strategy Map in BSC Designer Online

Training video: [Create Professional Strategy Maps](#)

A strategy map is a great visualization tool. In BSC Designer Online you can have several maps. The main one can be the classical Balanced Scorecard strategy map, and others can help in the visualization of important parts of your strategy.

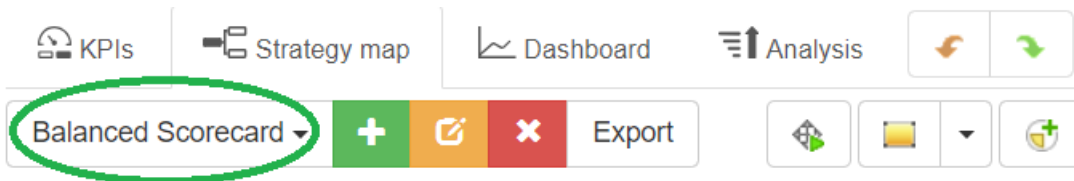
## View the strategy map

To view or edit a strategy map you need to open an existing scorecard or create a new one, and then go to the "Strategy Map" tab.



## Add strategy map

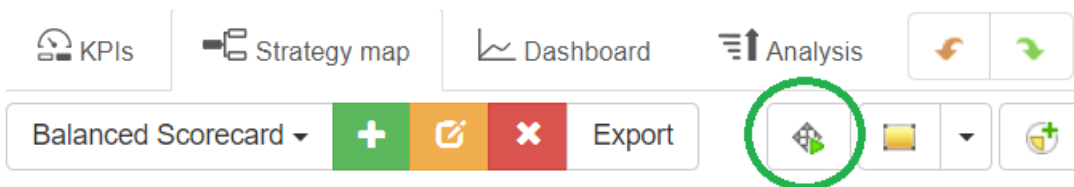
On the toolbar there is a drop list with all of the strategy maps available in your project:



Next to the drop list there are some buttons that allow **adding**, **renaming** or **deleting** a strategy map.

## Generate strategy map automatically


BSC Designer Online can generate a strategy map automatically using information about business goals, aligned KPIs, and cause-and-effect connections between them. To generate a map automatically, create a new map and click the "Strategy map placement" button:





BSC Designer will suggest for you to select a type of the map that you want to create, and will also allow you to customize map settings.

# Placement wizard

Style    Display themes    Responsible persons    Map display properties

  Balanced scorecard

  Overview

  Map with KPIs

OK    Close

The interface of the map wizard is divided into several tabs.

## Style

Select from several supported visualization styles

- **Balanced Scorecard** - a modern Balanced Scorecard strategy map with 4 perspectives, business goals, and cause-and-effect links between them
- **Overview** map - a rectangle-style map with top level KPIs/business goals only
- **Map with KPIs** - a geographical map where KPIs can be visualized

To use "Map with KPIs" map follow these steps:

1. Create a "Map with KPIs" using one of the predefined templates (\* note, in BSC Designer PRO you can create more templates)
2. Go to the "KPIs" tab and select an indicator that you need to align with a region on the map
3. Select "Link item to the map" in the Tools
4. Go back to the "Strategy map" tab and update your "Map with KPIs"

## Display themes

A business goal in BSC Designer can belong to various strategic themes. On "Display themes" tab one can choose the themes that need to be visualized on the current map.

## Responsible persons

Choose if you want to show all goals, or goals for the selected person responsible only.













## Map display properties

Various controls on this tab allow the user to customize the appearance of the business goals and aligned items on the strategy map.

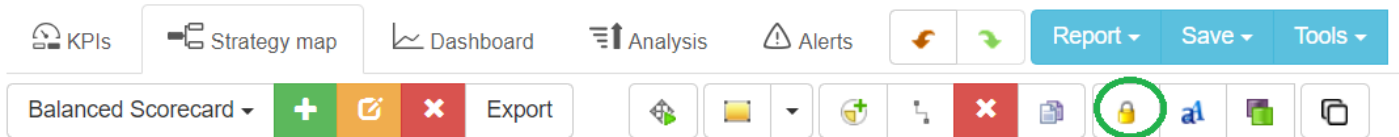
## Customize the way objects look

BSC Designer uses certain color styles for business goals and KPIs. It is possible to adjust some color settings. Select any object on the strategy map and click "**Formatting**" button on the toolbar:

KPIs    Strategy map    Dashboard    Analysis    Alerts    Report    Save    Tools

Balanced Scorecard    +            Export                                        

Once you finish editing make sure to click "Lock" button on the toolbar to let the software know that this object should not be changed when map will be rebuilt:

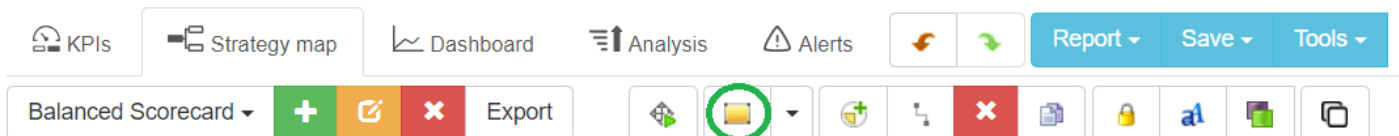


Another mean to customize the way how the business goals are displayed on strategy map is by customizing color scheme of the strategic themes. To do this go to the "KPIs" tab, select any business goal, go to the "Context" tab, find "Strategic theme" drop list, and click "Edit" button next to the drop list:



## Drawing on the strategy map

BSC Designer Online provides a wide range of objects that you can put on the map. Click on the "Custom objects" drop list to see what options you have:

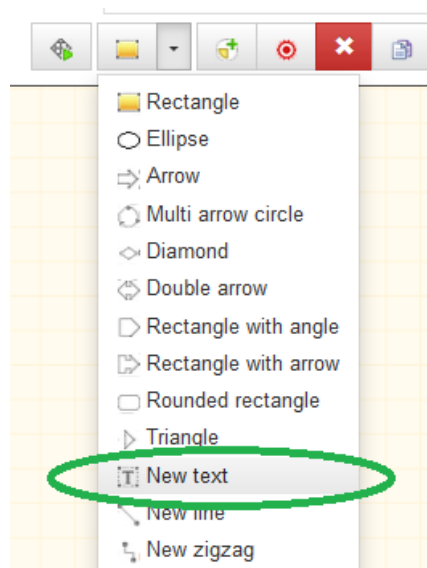


Select an object from the list and click on the strategy map in a place where you want to place this new object.

- Double click onto the new object to enter some text.
- If you need to customize objects settings such as color, gradient, etc. you need to **select an object** and click "Object properties button."

## Text on the strategy map

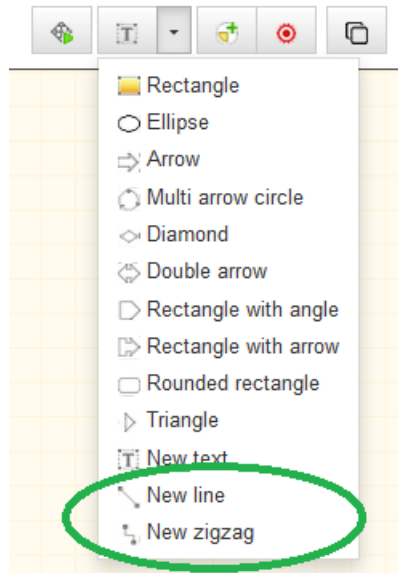
With the "Text" element you can put a text note anywhere on the strategy map.



To customize text properties such as font size and color, select an element and click the "Text Properties" button on the toolbar.

## Links

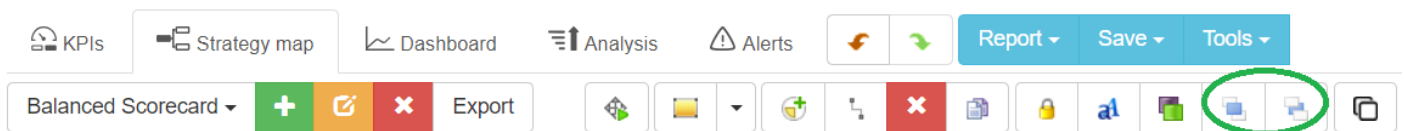
You can link two objects using different link types. Select a link type that you need:



move a cursor over a source object, click and don't release a mouse button, move the cursor to the other object, select destination point and release the mouse button.

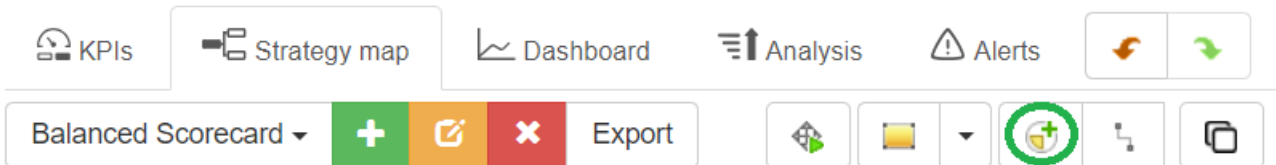
### Send to back, bring to front

Two buttons will help you to organize objects on the strategy map. Use them when you need to move some object to the front or bring it to the back.



### Adding business objects

You can add business objectives and KPIs to the strategy map.



- Use "Add KPI element" button to add a KPI to the strategy map. The software will ask to choose between creating a new KPI and adding a KPI that already exists.

You can double-click on the KPI item or business objective, BSC Designer will find this object on KPIs or Business Goals tab so that you can manage it.

If you want to learn how to use the strategy map for the Balanced Scorecard process, check out [this section of the manual](#).

# Performance Dashboards in BSC Designer Online

Training video: [Building Dashboards](#)

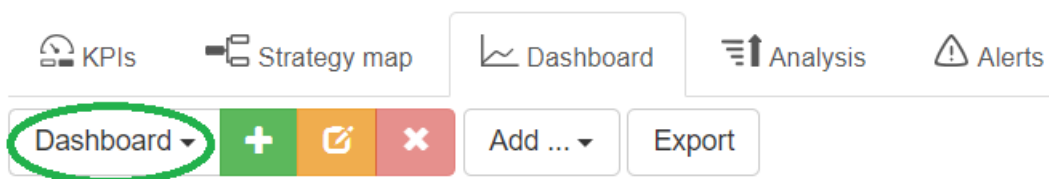
Dashboards in BSC Designer Online are a great way to visualize and share important performance information with all key members of your team. To access the dashboards follow these steps:

1. Log into your account at BSC Designer Online
2. Open any scorecard
3. Go to the "Dashboards" tab

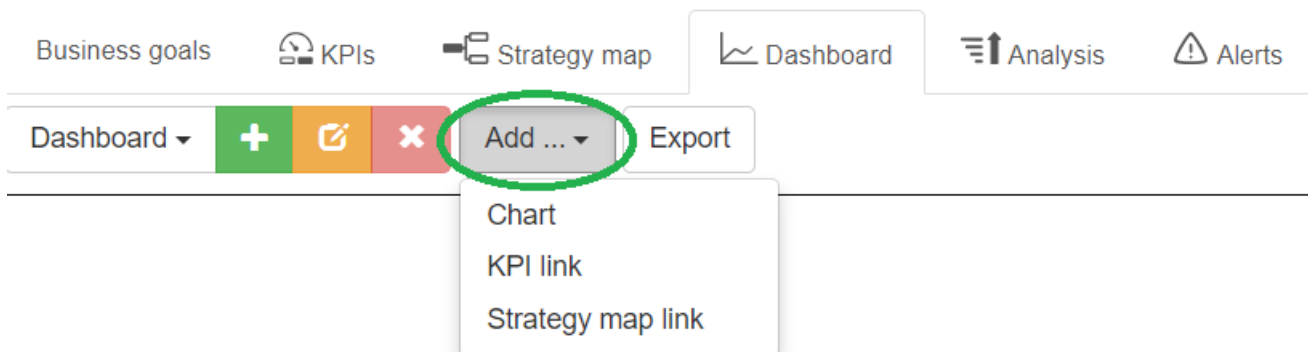
## Creating a new dashboard

Any scorecard in BSC Designer Online can include several performance dashboards. Using the toolbar on the "Dashboard" you can:

- Switch between dashboards available in the scorecard:



- Add new dashboards
- Rename existing dashboards
- Delete dashboards
- Add charts to the dashboards:



- Export dashboard as a picture file

## Adding a new chart to a dashboard

To add a new chart to a dashboard follow these steps:

1. Open any scorecard, go to the "Dashboards" tab
2. Click the "Add..." button on the toolbar and select "Chart" option. Dashboard chart options dialog will be displayed
3. Choose an indicator that will be used as a source of the chart data. Pay attention to the "Display for item selected on KPIs tab" checkbox:
  - If this checkbox is checked, then the indicator that is currently selected on the KPIs tab will be used as a source of the data
  - If the checkbox is not checked, then the software will ask you to select an indicator with the source data
4. Select chart type from the drop list
5. Select if you want to visualize on the dashboard "Value," "Performance," or "Progress"
6. Click "OK" to finalize the process

With the "Add..." menu it is also possible to visualize on the dashboard other objects from the scorecard:

- KPI
- Strategy map

## Adjusting chart properties

In BSC Designer Online it is possible to move and resize charts according to your needs.

To delete a chart:

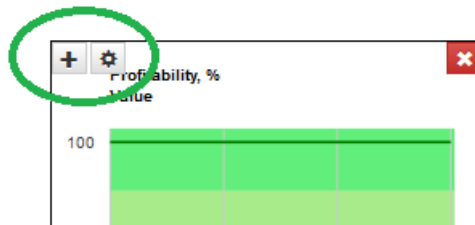
1. Hover over the chart
2. Click on the red cross icon that will appear

To resize a chart:

1. Move mouse pointer to the edge of the chart
2. Press mouse button, resize chart as needed
3. Release mouse button

Some charts (for example, a Time chart) can be customized additionally.

1. Move mouse pointer over the chart
2. Additional controls will appear



3. Use "+" button to add additional indicators to the chart
4. User "gear" button to customize chart, for example to change the period of time visualized on the chart

# Performance analysis in BSC Designer Online

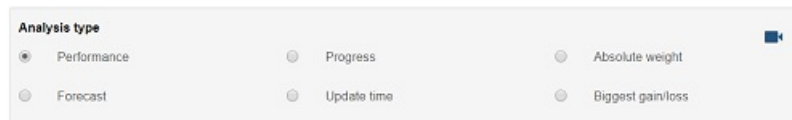
Training video: [KPIs Performance Analysis](#)

With "Analysis" tab users of BSC Designer Online can do a quick performance review of their scorecard and KPIs.

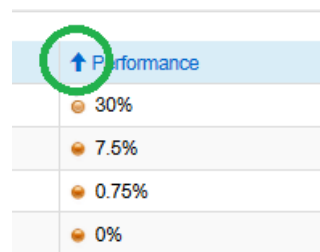
## How-to use analysis function

Here is a general approach to using the analysis functions in BSC Designer Online:

1. Open a scorecard in BSC Designer Online and go to the "Analysis" tab
2. Choose the analysis type that you want to use right now:



3. In the list of indicators some columns will support order sorting, click on them to change sorting order:



4. Options below allow to adjust time interval for the analysis as well as other settings

## Analysis types

Here are the supported analysis types in BSC Designer Online:

- **Performance** - find best/worst performing indicators
- **Progress** - find indicators with highest/lowest progress
- **Absolute weight** - find indicators with the highest/lowest impact on the scorecard performance
- **Forecast** - do a linear forecast of indicator's value that is expected to be achieved for a certain date, or forecast a date when certain value will be achieved
- **Update time** - list indicators and their update dates, find indicators that were not updated on time
- **Biggest gain/loss** - find indicators that were the biggest gain/loss (can be applied to "value," "performance," "progress") over a period

# Reports in BSC Designer Online

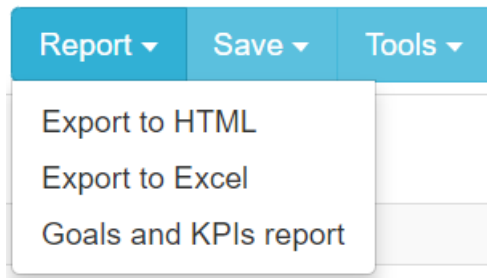
Training video: [Creating Performance Reports](#)

BSC Designer provides various visualization and reporting means.

## Generate a report for the scorecard project

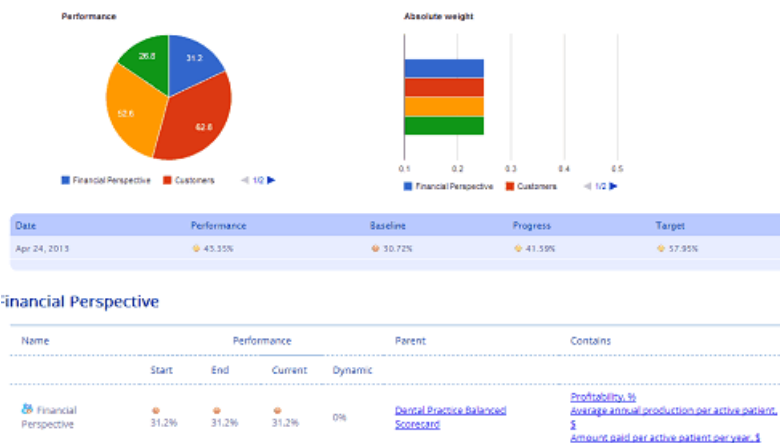
To generate a report please follow these steps:

1. Open a scorecard
2. Select "Report" menu and select one of the options:



- **Export to HTML** - a report with all the details about your KPIs and their performance
- **Export to Excel** - a live (with formulas and calculations) copy of the KPIs from your project presented in MS Excel
- **Goals and KPIs Report**
  - **Cost of Strategy** - a summary of all initiatives with budget and duration data
  - **Efforts vs. Results** - a report with leading and lagging data
  - **Action Plan** - a report with goals, initiatives, and persons responsible
  - **Customize** - use this option to create your own reports.

3. Follow the link to open a generated report.



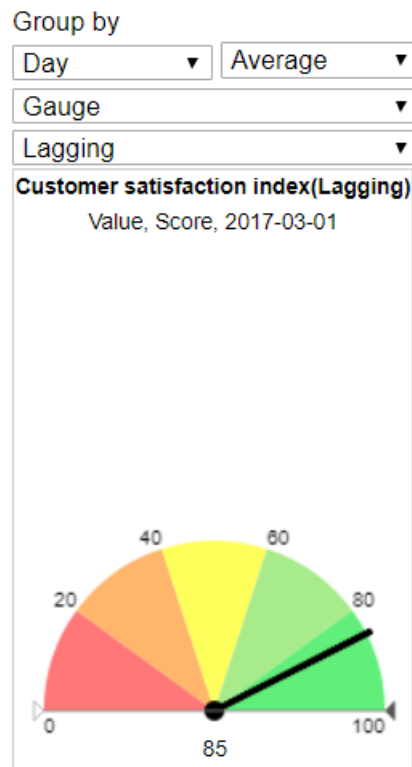
Any HTML report can be converted into an Adobe PDF document using any of free PDF printers available.

## Charts in BSC Designer Online

To access charts and diagrams in BSC Designer Online open a scorecard, go to the KPIs tab and select any container or indicator. The chart element is displayed on the right.

Besides having a chart you have several drop lists.





- **Group by** has two drop lists that define information reporting interval (by day, by month, etc.) and summary type (average, sum, etc.)
- **Chart type** - select the chart that you want to display right now
- **Leading/lagging** - select to display leading or lagging part of the data (*available for containers only*).

## Details about Charts and diagrams

BSC Designer Online supports several types of chart.

- **Time chart.** The chart shows how the value of the KPI changes over the time. On the chart, the baseline and target values are displayed as well.
- **Gauge diagram.** Displays the values of the KPI for the date selected in the calendar. The baseline and target values are displayed as well.
- **Optimization.** Refers to the formula that is used to calculate the performance.
- **Performance and Progress.** These charts show how the performance and progress value for the selected KPI are changing over a period of time.
- **Pie.** A Pie diagram is useful when you need to compare the performance of several KPIs in one container or in several top container.
- **Values.** Values table shows a date and respective KPI value for these dates.
- **Weight.** This chart shows weights of all KPIs within a selected container.

# Setup Alerts & Notifications in BSC Designer

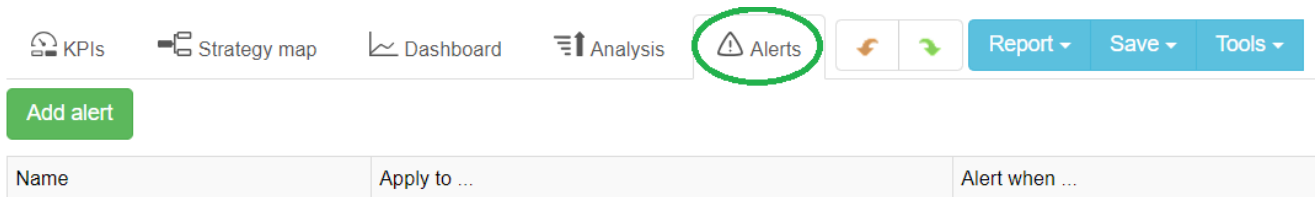
Training video: [Automatic Alerts for KPIs](#)

Whatever updates the value of a KPI, BSC Designer can inform a user about important changes that were made.

## Access alerts in BSC Designer Online

To access alerts in BSC Designer Online:

1. Open any scorecard project
2. Go to the "Alerts" tab



3. Click the "Add alert" button
4. Select required settings for an alert and click "OK"

## Alert settings

Change alert settings according to your needs:

**Name**

New alert

**Apply to ...**

Whole document

Alert on the change of KPI's value

Alert for any change of the value  
 Alert for the specific value < 0 0  
 Alert for specific stop light color = Red

**Who will receive an alert**

Add ▲ Delete

**Max alert send frequency**

Each occurrence

Send all alerts in the single email

OK Close

- **Name** - a name for the new alert
- **Apply to...** - apply alert to the whole project or only for some specific KPIs in your project.
- **Alert type** - decide what would be an event that will generate an alert notification. Depending on the alert type the software will suggest to specify additional settings.
- **Who will receive an alert** - click the "Add" button to select [users](#) that need to get this alert
- **Max alert send frequency** - define how often you want to get an alert. If you want to have a notification as soon as the event happens, then use the default settings. You can also configure BSC Designer to send updates each week with a digest of notifications.