



PRODUCT DESCRIPTION

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Product description

Corporater EPM Suite

What is Corporater EPM Suite ?

Corporater EPM Suite is the most commonly used IT-tool for Balanced Scorecard management worldwide. The software is an extremely user-friendly, standardised solution with extensive and powerful functionality. The software is reasonable to purchase, implement and maintain. The Corporater software is developed making customisation of program code for each customer unnecessary. All aspects of the solution can be configured by the customer's administrator, without the need for customisations. Without help from external consultants, Corporater customers develop and maintain their own scorecards.

Our customers have been, and still are, involved in our software development process. Focusing on our customers' needs has helped us develop robust, functional, easy to maintain and user-friendly software.

Corporater EPM Suite is a standardised software solution for Balanced Scorecard management. The solution contains modules for strategy development, building strategy maps, manual and automated data collection, presentation, reporting and follow-up of results with Initiatives. The scorecards are visualised for users through the web in a personalised user interface, customised for individual users or user groups.

Introducing Corporater

Corporater is an international software company specialising in development of software for Balanced Scorecard management. The company is the market leader of IT-solutions and currently has over 1000 customers worldwide. One of our first customers, the municipality of Stavanger, won the Balanced Scorecard Award in 2001 for the best practical implementation of the Balanced Scorecard methodology.

Corporater was established in April 2000 and is headquartered in Stavanger, Norway. Corporater Group has offices in India, USA and Argentina. It has partner represented offices in Brazil, Beirut, Dubai, South Africa, Corporater works with leading management consultancy companies with expertise in strategic management and Balanced Scorecard methodology.

Our software is in use in a number of major private and public enterprises. Our software portfolio has been the best selling solution for Balanced Scorecard management in the European market since 2002.

What is Balanced Scorecard?

Balanced Scorecard is the leading method for developing, communicating and visualising strategy and goals for governmental and private organisations. This concept was developed by Dr. Robert S. Kaplan and Dr. David P. Norton after considerable studies of management processes in large American and European organisations. Over the past 10 years Balanced Scorecard has helped thousands of organisations move from “accounting-based management” to a management process founded on a knowledge-based strategy, where all employees work towards mutual organisational goals.

Studies by Kaplan and Norton show great differences between organisations that use Balanced Scorecard and those that use other management principals. Some differences are:

Impact of Measurement Systems on the Alignment and Awareness of Organizations	“Balanced Measurement Companies”	“Non-Balanced Measurement Companies”
Agreement among senior management on strategy	90 %	47 %
Good cooperation and teamwork among management	85 %	38 %
Open sharing and communication	71 %	30 %
Effective communication of strategy	60 %	8 %
High levels of self-monitoring by employees	42 %	16 %

Source: Kaplan and Norton “The Strategy-Focused Organization” Harvard Business School Press, 2001

The core of Balanced Scorecard is that in order to improve something, you must measure it. The method helps organisations focus on the most important performance indicators. Goals are grouped by strategic objectives under different perspectives. In addition to measuring the financial perspective (history), the goals are balanced with indicators on the customer perspective and internal processes (present), and learning and growth (providing results in the future) or other relevant perspectives. In this way the strategy can be built so it is understood by the whole organisation, and all employees see how they can contribute to reaching the organisational goals.

The Corporater Solution

Corporater offers a comprehensive Balanced Scorecard solution. The concept is a fully integrated solution based on the latest in technology and open source standards. The solution contains the following:

Web-based, personalised end-user interface for visualising strategy maps, scorecards, key performance indicators, Initiatives and management reports

- A web based configuration utility (Web Configuration) that allows users to create and manage their scorecards over the web
- An inline editing functionality that allows users to instantly edit what they see.
Access to this functionality could be restricted at user level
- Effortless building and maintenance of scorecards, including presentation of goals and results through key performance indicators
- Automated data collection from various external sources
- Ability to query databases directly to extract data into the scorecard system
- Robust functionality for manual data collection and surveys from internal and external users
- Integrated tool for development and visualising of strategy and work processes
- Extensive functionality for reporting results, as well as distribution and publication of reports

Corporater EPM Suite is a software solution based on modules in which the customer selects functionality based on requirements. The following are the modules:

- **Enterprise Performance Management (Main Module)**
- **Risk Manager Module**
Integrated risk management
- **Reporter Module**
Creation and distribution of reports
- **Strategic Initiative Module**
Follow-up of results with Initiatives and tasks
- **Portal Module**
Creation of customized performance management portals
- **Transformer Module**
Automated data extraction, transformation and loading tool
- **Forms Module**
Data collection from internal users
- **Surveyor**
Web based surveys

Product Overview

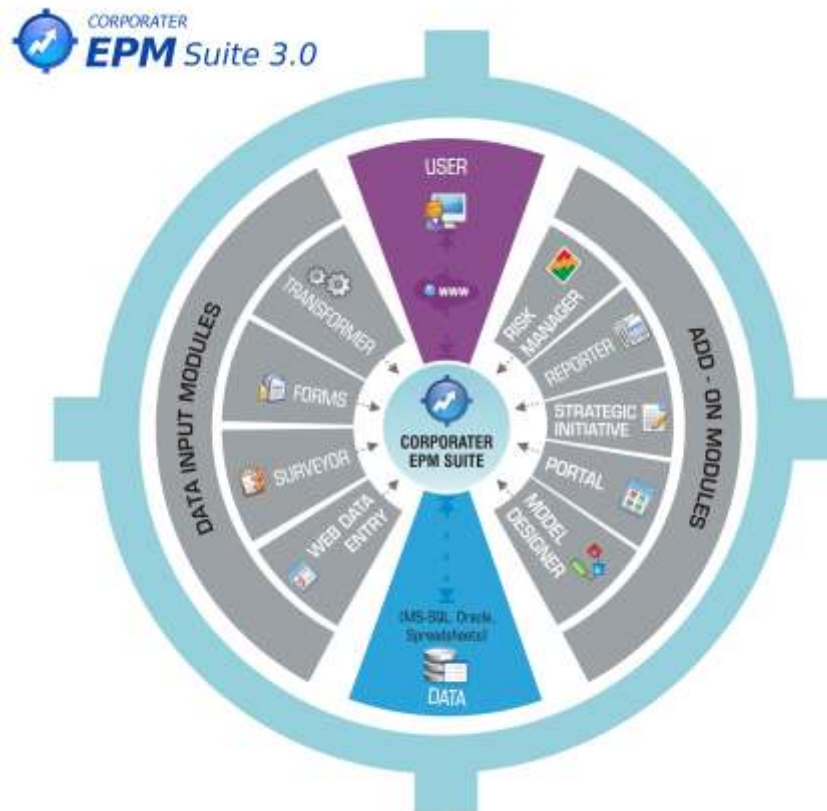


Illustration: Graphical illustration of the different modules of Corporater EPM Suite

The individual functions

Data collection

Corporater offers a wholly automated and closely integrated solution for data collection. The solution has a user-friendly graphical interface for defining rules for including data.

Data can easily be retrieved from spreadsheets, flat files or by direct access to databases.

The Transformer module has access to model data (Meta data), and it is easy to establish connections with data sources. Even though most of our customers have other ETL tools, they prefer Corporater Transformer because it is especially easy to use and tightly integrated with the Corporater solution.

Data which has been organised especially for the customer's IT solution can be easily included by a person without IT specialisation.

Defining /configuring the strategic model

Corporater offers an administrative tool that is intuitive and easy to use for establishing and maintaining scorecards. A KPI calculator, which is replete with functions that make it easy for the administrator to define business rules, is a central part of the solution.

Examples of business rules:

- Rankings, best or worst departments, comparable departments
- Aggregated data, average per day/month/quarter

- Real, budget, forecast, target, calculated budget/forecast, deviations
- Time periods, rolling x months, same period last year, best period
- Index, last registered value, average for organisational unit
- Conditions (If/Then), regression

In contrast to other software for Balanced Scorecard, the processing and presentation logic can be configured in Corporater solution by the administrator. This means that the data collection and integration job is minimal. The maintenance and changes to the scorecard model can be done by the administrator (business owner usually a comptroller).

The customer can take charge of further expansion and roll-out of the scorecards in their own organisation. In our experience two days of training is adequate for the administrator to be capable of configuring new scorecards and connecting the organised data. In addition Corporater offers support by telephone and e-mail as necessary.

Templates, Defaults and Property Management

Templates allow users to create master scorecard structures that can be used throughout the solution. In a situation where there are multiple scorecards that are similar across several organizations, templates offer an efficient way to create and manage scorecards. Further, any change made to a template reflects across the scorecard system immediately.

Property Management

By default, each object in the Corporater system has a number of properties, e.g.Name and Description. The default properties for each object can be modified to suit specific requirements. Once created, the object wherever used will take the settings used in the property management. This is yet another way of efficiently creating and managing scorecard structures.

Defaults

Use Defaults to define objects, properties and structures that should always be present. Users can then create new objects in a model based on the Defaults defined. For example, you may want KPIs to always include a Description and a chart. Add these two objects to the KPI in Defaults and they will always be included when new KPIs are created.

Visualising

The scorecards are presented through a personalised, intuitive and thoroughly adaptable end user interface.

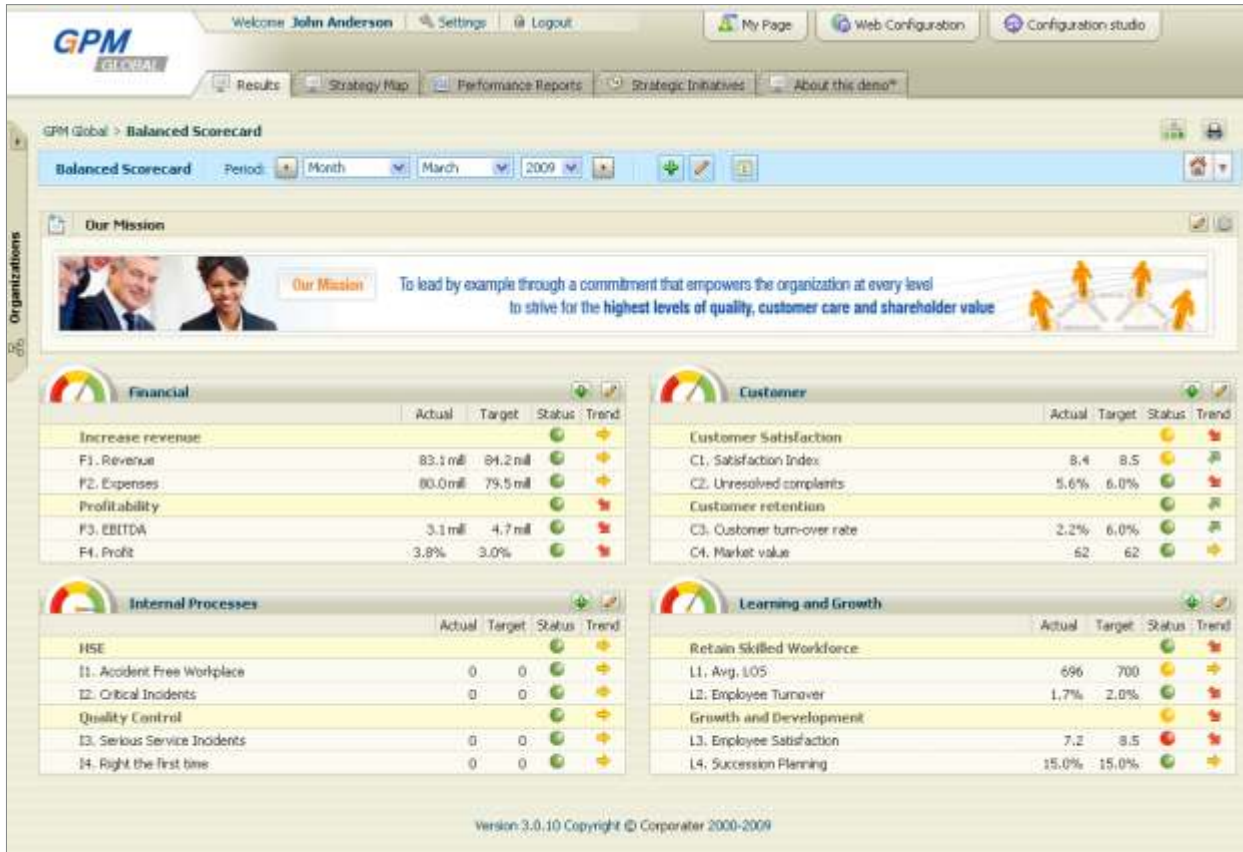


Illustration: Example of a scorecard for an organisational unit

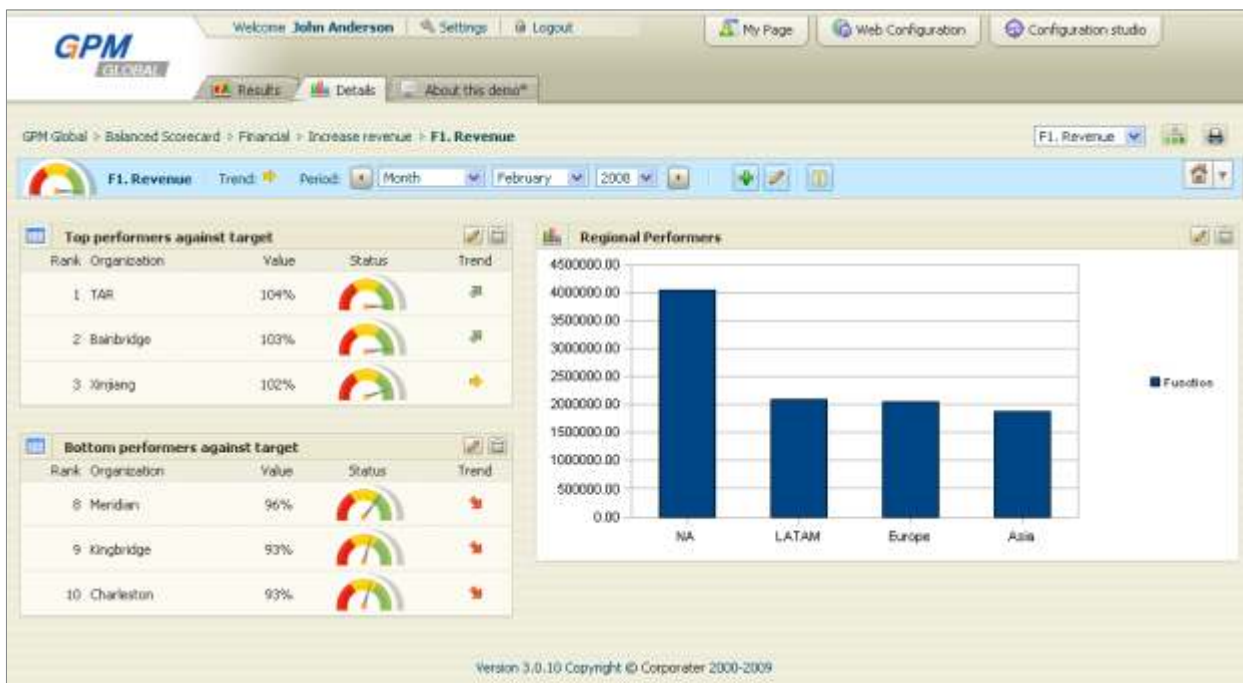


Illustration: Details on a key performance indicator (KPI) with benchmarking

Actual

Period: Month December 2009

Time drill

Name	January	February	March	April	May	June	July	August	September	October	November	December
<input checked="" type="checkbox"/> GPM Global	83.6	84.2	83.1	83.2	82.5	83.0	83.5	83.4	83.4	82.3	83.3	83.6
Administrative	1.9	2.1	2.0	1.9	1.9	2.2	2.1	2.0	2.1	2.0	1.9	2.0
Human Resources	2.2	1.9	2.1	2.1	2.0	1.9	2.1	1.9	2.1	2.0	1.9	2.1
<input checked="" type="checkbox"/> Sales and Marketing	10.3	10.8	9.8	10.4	10.6	10.3	10.9	10.7	10.5	10.2	10.4	10.5
NA	4.3	4.6	4.1	4.3	4.6	4.2	4.7	4.6	4.6	4.3	4.5	4.3
LATAM	1.8	2.0	2.0	1.9	2.1	2.1	2.1	2.0	2.0	2.1	2.1	2.0
Europe	2.0	2.0	1.8	2.0	1.9	2.1	2.0	2.0	1.9	1.9	2.0	2.1
Asia	2.1	2.1	1.9	2.1	2.0	1.9	2.1	2.1	2.0	1.9	1.8	2.1
<input checked="" type="checkbox"/> Regions	69.2	69.4	69.1	68.7	68.0	68.6	68.4	68.7	68.7	68.1	69.2	69.0

Name	January	February	March	April	May	June	July	August	September	October	November	December
<input checked="" type="checkbox"/> Revenue	83 578.2	84 169.2	83 133.6	83 158.8	82 514.8	82 982.9	83 539.3	83 362.3	83 442.7	82 347.8	83 266.0	83 619.1
<input checked="" type="checkbox"/> Contract	9 990.9	9 993.1	9 728.1	9 729.8	9 840.6	10 107.5	9 896.0	9 841.6	9 967.0	9 769.8	9 900.9	9 921.7
Reimbursables	3 582.4	3 606.0	3 587.2	3 590.3	3 604.4	3 594.6	3 590.2	3 604.8	3 606.0	3 605.1	3 593.2	3 611.2
<input checked="" type="checkbox"/> Other	13 908.4	13 366.8	13 841.1	13 847.2	13 928.6	13 900.9	14 021.1	13 725.3	13 675.1	13 523.8	13 656.6	14 336.5
<input checked="" type="checkbox"/> Sales	43 300.6	44 510.6	43 173.6	43 199.4	42 514.7	42 438.9	43 490.5	43 466.4	43 441.6	42 555.9	43 264.1	43 014.6
<input checked="" type="checkbox"/> Licensing	12 796.8	12 693.8	12 803.5	12 792.2	12 626.5	12 951.1	12 541.4	12 724.2	12 753.0	12 893.2	12 851.3	12 735.0

Actual budget drill

Name	Actual	Budget	Deviation	Actual YTD	Budget YTD	Deviation
<input checked="" type="checkbox"/> GPM Global	83.6	83.4	0.2	999.1	998.2	1.0
Administrative	2.0	2.1	-0.1	24.1	24.1	-0.0

Illustration: Example of a drill-down report with time based drill and budget deviation

The individual modules



The main module of the software consists of an administration module (Configuration Studio) in which the Scorecard model is defined and configured. In addition, the main module consists of a web-based, graphical user interface, which visualises the scorecard model for all users.

Corporater Configuration Studio (administration)

The administration module is designed to allow for several administrators (multi-user), and access rights are assigned to each user. The administration module contains the following functionality:

- Establishing scorecards and scorecard structure
- Establishing access rights
- Data administration (updating and deleting)
- Manual data input
- Establishing all data structures

- Maintenance of the application
- Configuring and establishing key performance indicators
- Configuring reports
- Defining drill-down reports
- Establishing internal benchmarking between departments
- Configuration of language and terminology
- Establishing dynamic goals, prognoses and budgets

The administration module is intuitive and easy to use for establishing and maintaining scorecards. A KPI calculator, which is replete with functions that make it easy for the administrator to define business rules, is a central part of the solution.

Illustration: Configuring a performance indicator (KPI)

A small selection of business rules could be, for instance:

- Rankings, best or worst districts, comparable districts
- Aggregated data, average per day/month/quarter
- Real, budget, prognosis, target, calculated budget/prognosis, deviations
- Time periods, rolling x months, same period last year, best period
- Index, last registered value, average for organisational unit
- Conditions (If/Then), regression

It is recommended that core data be loaded into the Corporater Solution database. By using the KPI calculator processing and presentation logic can be defined by the administrator. Using core data gives advantages when changing data structure, organizational structure or strategy, and makes data collection and integration considerably easier. Corporater differs from competitors who implement pre-calculated KPIs that do not give the same advantages as Corporater solution. One such advantage is Corporater powerful option for drill-down reports, showing cause and effect in a clear and detailed manner.

Corporater recommends two days of training for administrators. After basic training the administrators are capable of configuring new scorecards and connecting newly organised data. Our customers have been able to take charge of further expansion and roll-out of scorecards and take care of operating the solution on their own.

Corporater Configuration Studio (administration)

The access to the web application is as simple as logging into the web interface. There is no need for any locally installed software on the individual computer (such as Applets, Cookies, Java beans etc.). Our only requirement is that the users have Internet Explorer or Netscape version 5 or higher, in addition to access to Intranet or Internet and a user name and password (and potentially a “single sign-on” solution).

The Web Configuration contains the following functionality:

- Create and manage scorecards, perspectives, objectives, KPIs and other elements in the scorecard structure
- Create and manage Nodes
- Create Web Data Entry forms
- Manually input data
- User access management
- File management

The scorecards are visualised through a personalised, intuitive and well-prepared user interface. Corporater has put a great deal of effort into achieving optimal visualising of the scorecards and an intuitive and optimal navigation model.

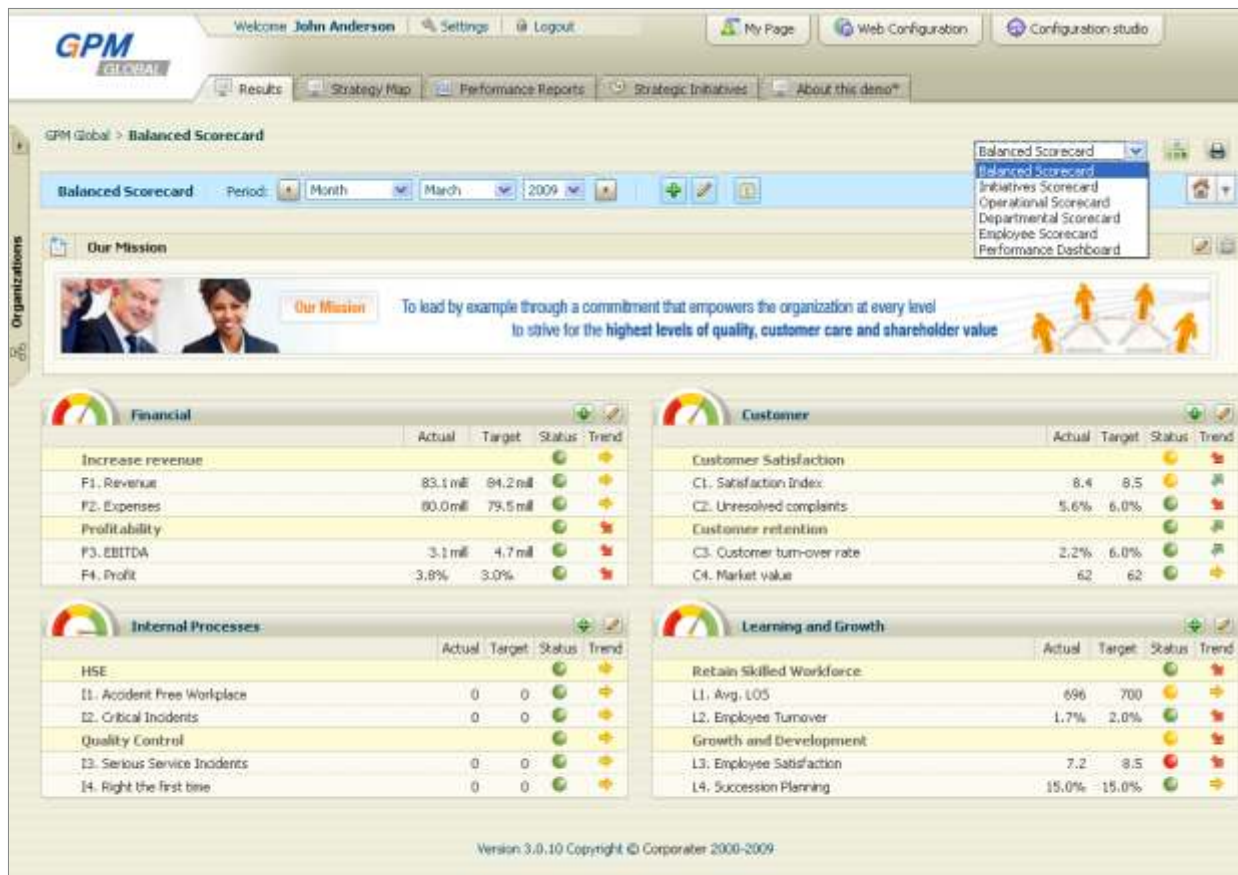


Illustration: scorecard page for a business area with several scorecards available

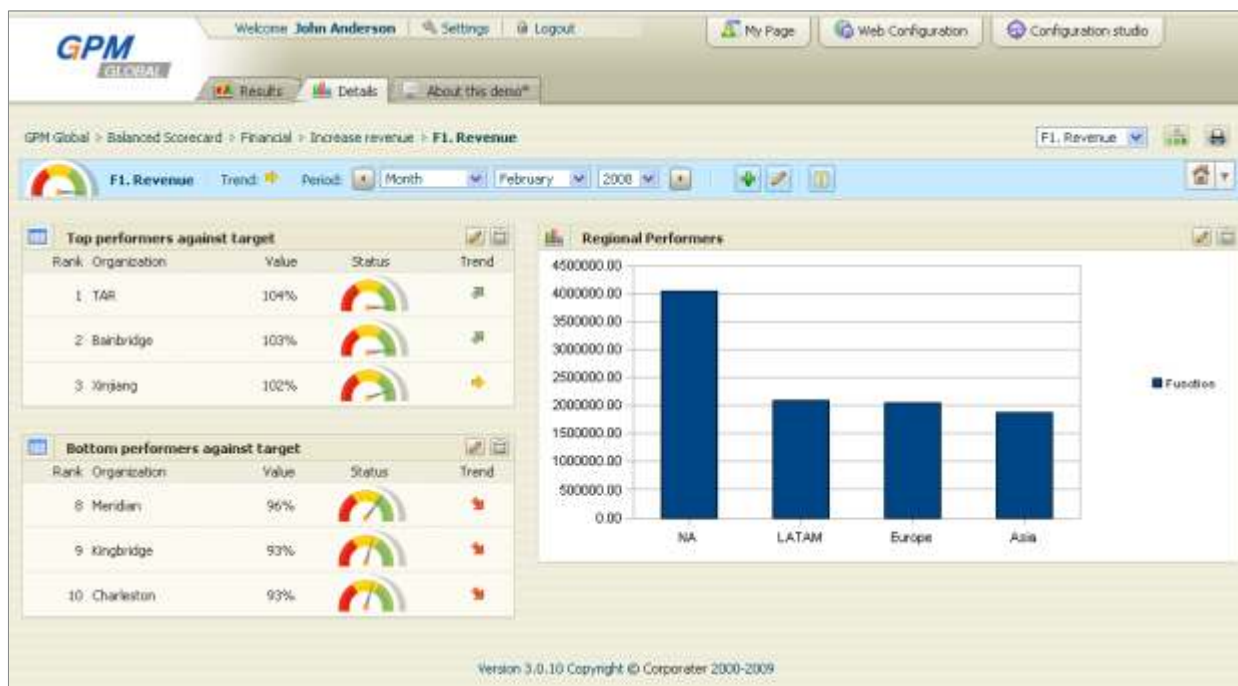


Illustration: page showing details for a performance indicator (KPI) with external benchmarking

Corporater Transformer

Corporater Transformer is a user-friendly ETL (extracting, transforming and loading) module, optimised for loading data into the Corporater Solution database. The solution has automated data collection and can be scheduled to run at predefined times. Transformer has specialised objects that simplify data transformation and data connection. The tool is designed for users without IT specialisation.

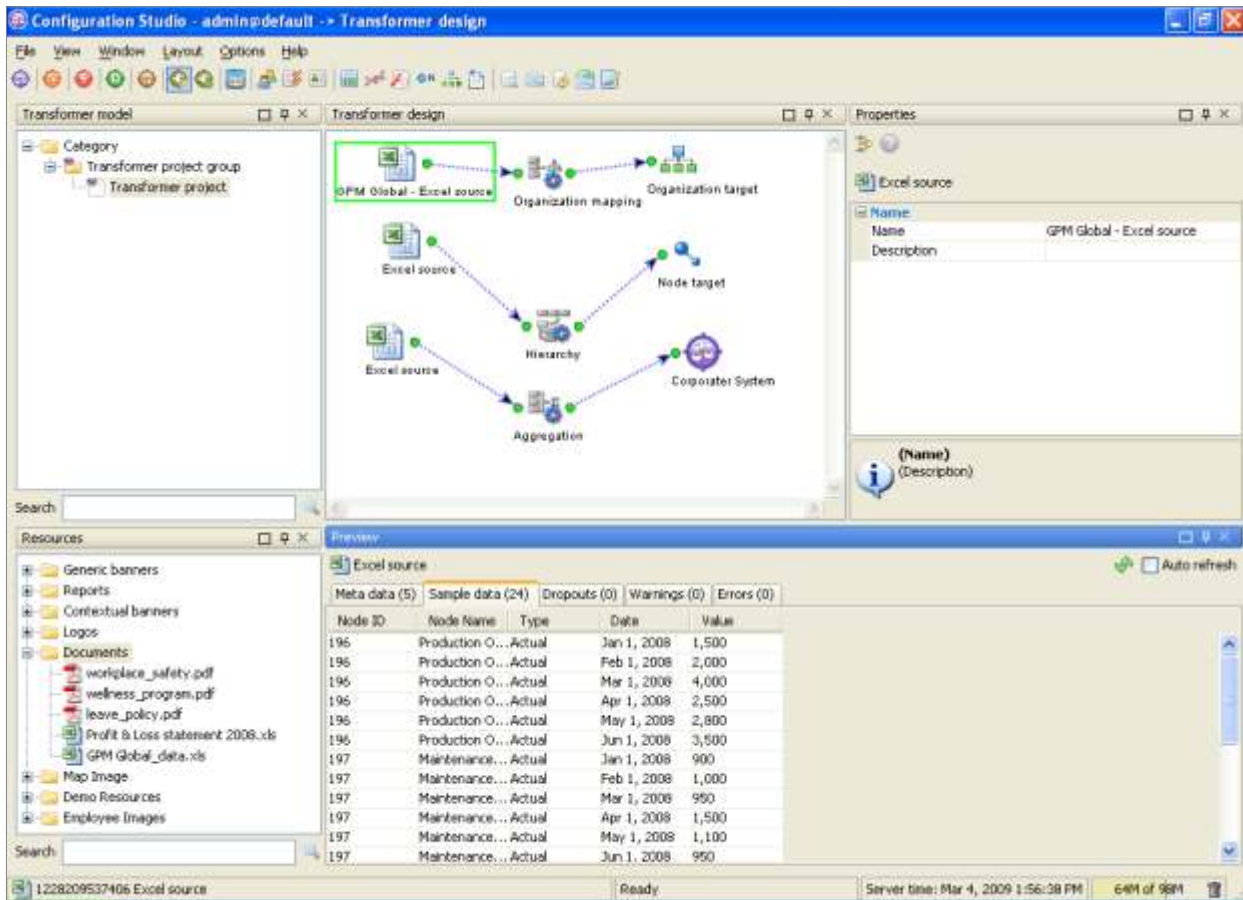


Illustration: Example of “data mapping grid” in Corporater Transformer

Corporater Transformer has an easy to use graphical user interface for defining data connection rules. Data can be easily loaded from spreadsheets, flat files or directly from other databases. The module contains Meta data and it is easy to specify connections between data sources and the scorecard database. Corporater Transformer contains tools to export data from the scorecard database to a range of formats.

Corporater Forms

Corporater Forms is an integrated solution for manual data collection from internal users through web-based forms. The solution provides full control of manual data collection, and the administrator can easily see who has not reported results for a given period. E-mail functionality is included in the application to enable notification to users when results are due for registration or reminders when data is missing. Additionally, the administrator or owner of the form can receive an overview of non-respondents and contact the respondents to ensure that forms are responded to in time.

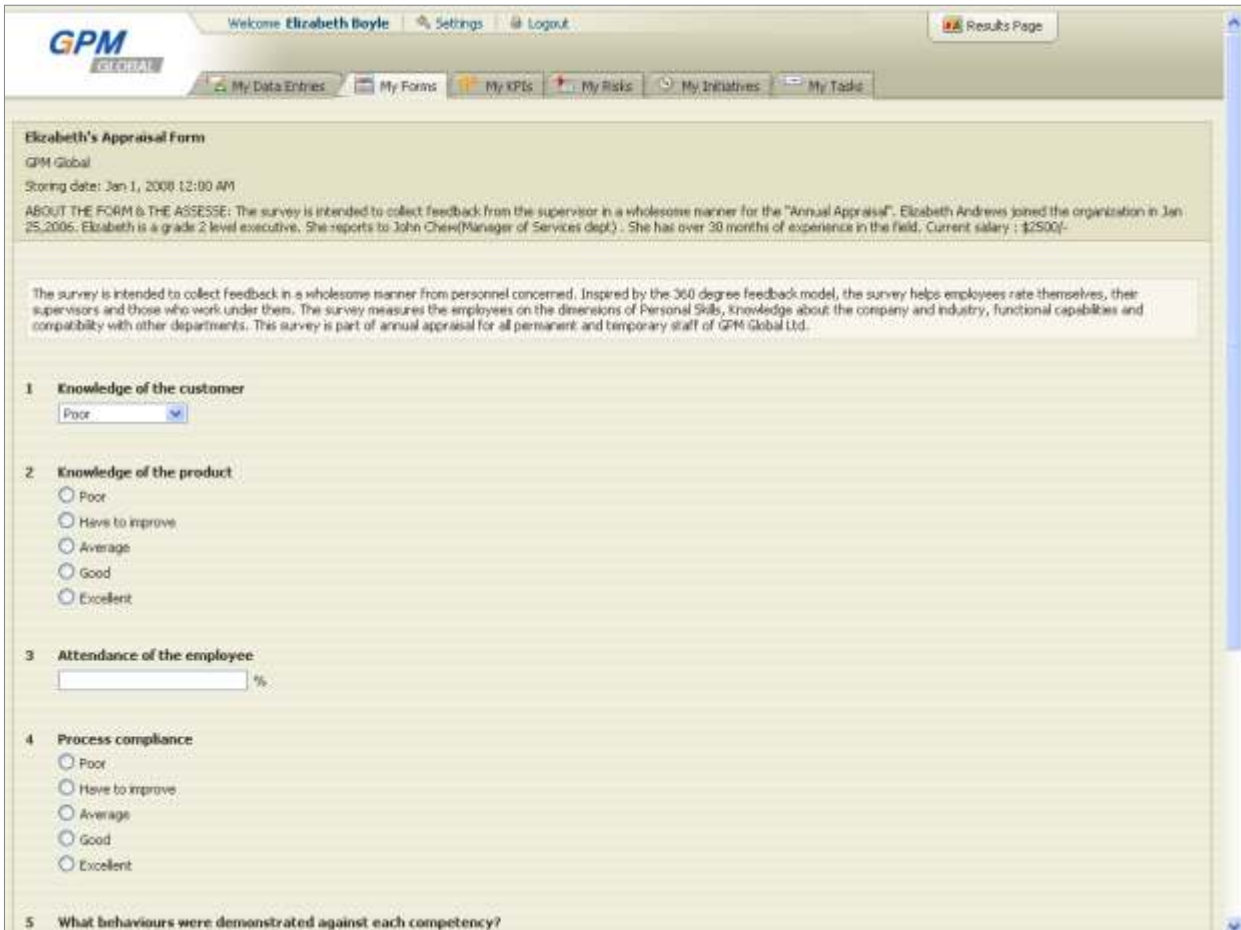


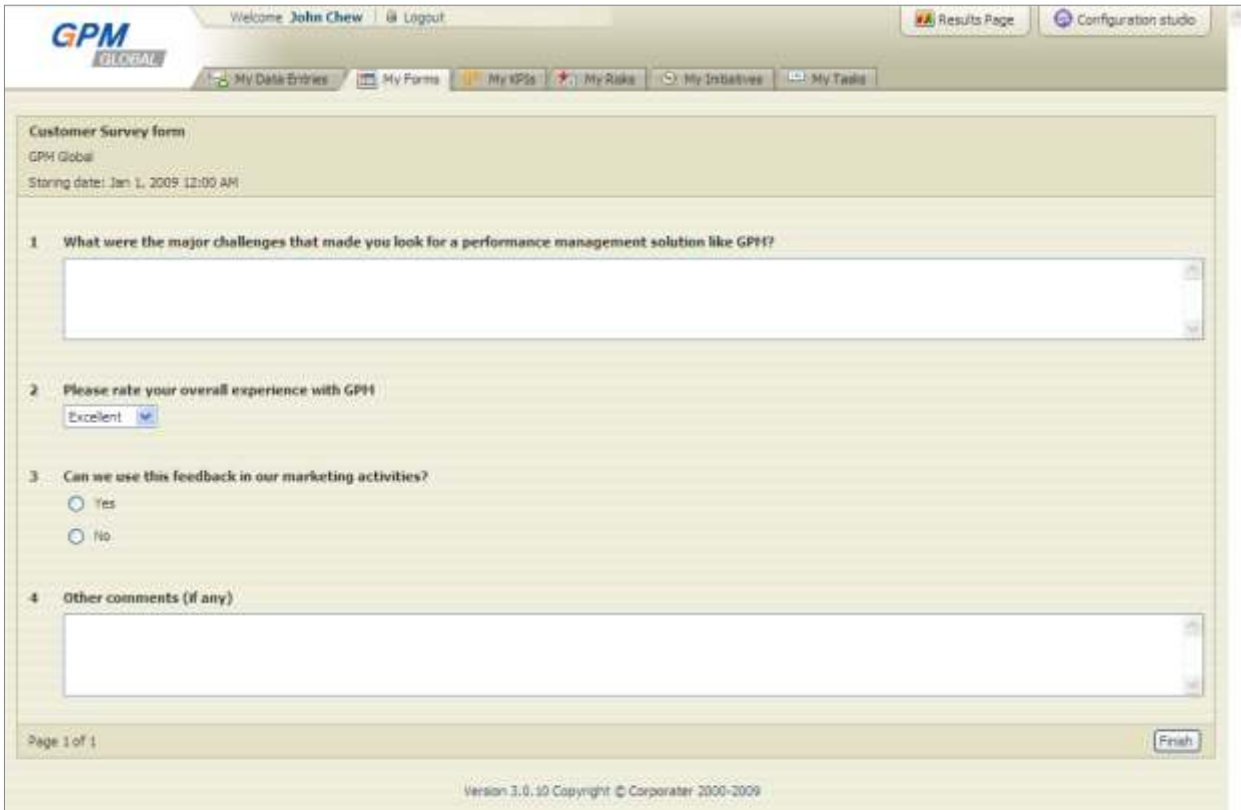
Illustration: Example of a simple survey from Corporater Surveyor

Corporater Forms ensures that reporting of manual data is done in an easy and user-friendly manner. The solution ensures that the quality of reported data is as high as possible, and at the same time eliminates errors based on incomplete reporting.

Kaplan & Norton claim that 50-60% of all performance indicators in typical scorecard projects are based on manual data collection. Corporater Forms is ideal for collection of data unavailable through automated data collection, such as periodic production data.

Corporater Surveyor

Corporater Surveyor is an integrated module for web-based surveys. The surveys can be administered internally in the organisation or externally to customers, vendors or others. Data from surveys make up an increasing part of the scorecards and this module ensures efficient and inexpensive distribution and gathering of data. A separate e-mail server is built into the application to distribute invitations to participate in the surveys. Automated presentation of a survey to a web site is also possible.



The screenshot shows a web browser window displaying a survey form. The browser's address bar shows 'Welcome John Chew' and 'Logout'. The page header includes the 'GPM GLOBAL' logo and navigation tabs for 'My Data Entries', 'My Forms', 'My KPIs', 'My Risks', 'My Initiatives', and 'My Tasks'. The survey form itself is titled 'Customer Survey form' and includes the following questions:

- 1 What were the major challenges that made you look for a performance management solution like GPM?
- 2 Please rate your overall experience with GPM
- 3 Can we use this feedback in our marketing activities?
 Yes
 No
- 4 Other comments (if any)

At the bottom of the form, it says 'Page 1 of 1' and 'Finish'. The footer of the browser window indicates 'Version 3.0.10 Copyright © Corporater 2000-2009'.

Illustration: Example of a simple survey from Corporater Surveyor

The solution is designed for surveys of customers, quality, service, and market temperature. Immediately after the respondent clicks on 'Send form', the responses are displayed in the scorecard database and the information is available for analysis and reporting.

Corporater Surveyor has functionality which allows respondents to be anonymous. If the administrator chooses 'High integrity' for a survey, the response is physically separated from information about the respondent and can not be traced. Additionally, it is possible to limit access to answers if there are few respondents at one level (e.g., a department with few employees). If there are few respondents, the responses will be included in a higher level.

Corporater Strategic Initiative

Corporater Strategic Initiative is a module for following up Initiatives with integrated tasks and milestones. The Initiatives can be linked to scorecards, perspectives, strategic objectives or key performance indicators. Each action plan may contain a set of activities, milestones, attachments, responsibility, progress, periodical comments, priority and status. An action plan can be established on a higher organisational level and easily distributed or linked to departments. This allows management to follow up Initiatives and activities in the departments through easily available overviews or key performance indicators directly.

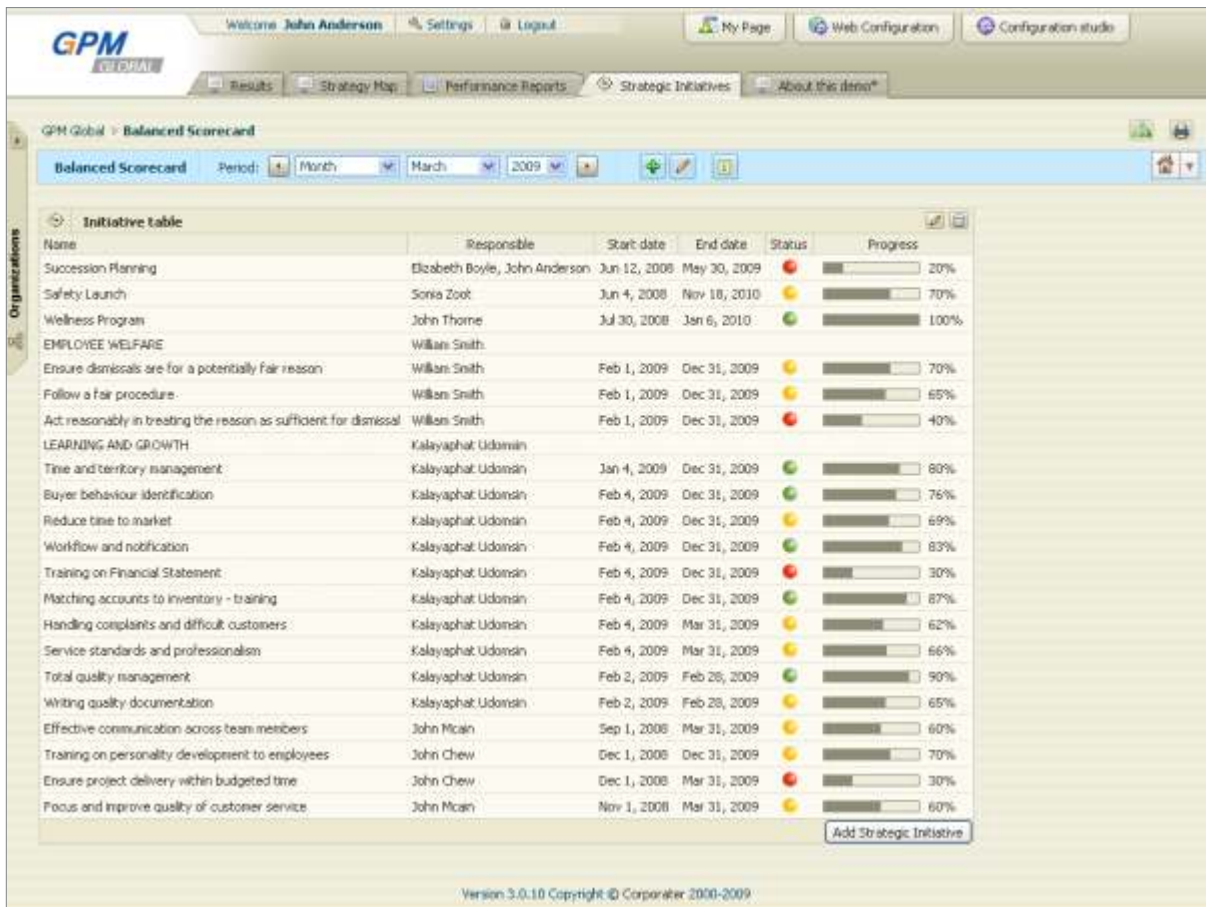


Illustration: Presentation of higher level Initiatives and tasks

The Strategic Initiative module contains a filter that makes it easy to form an overview of Initiatives and their status. For example, they can be sorted by status, person responsible, date and progress. Corporater Strategic Initiative contains functionality to notify deadlines, milestones and changes in Initiatives or related tasks through email.

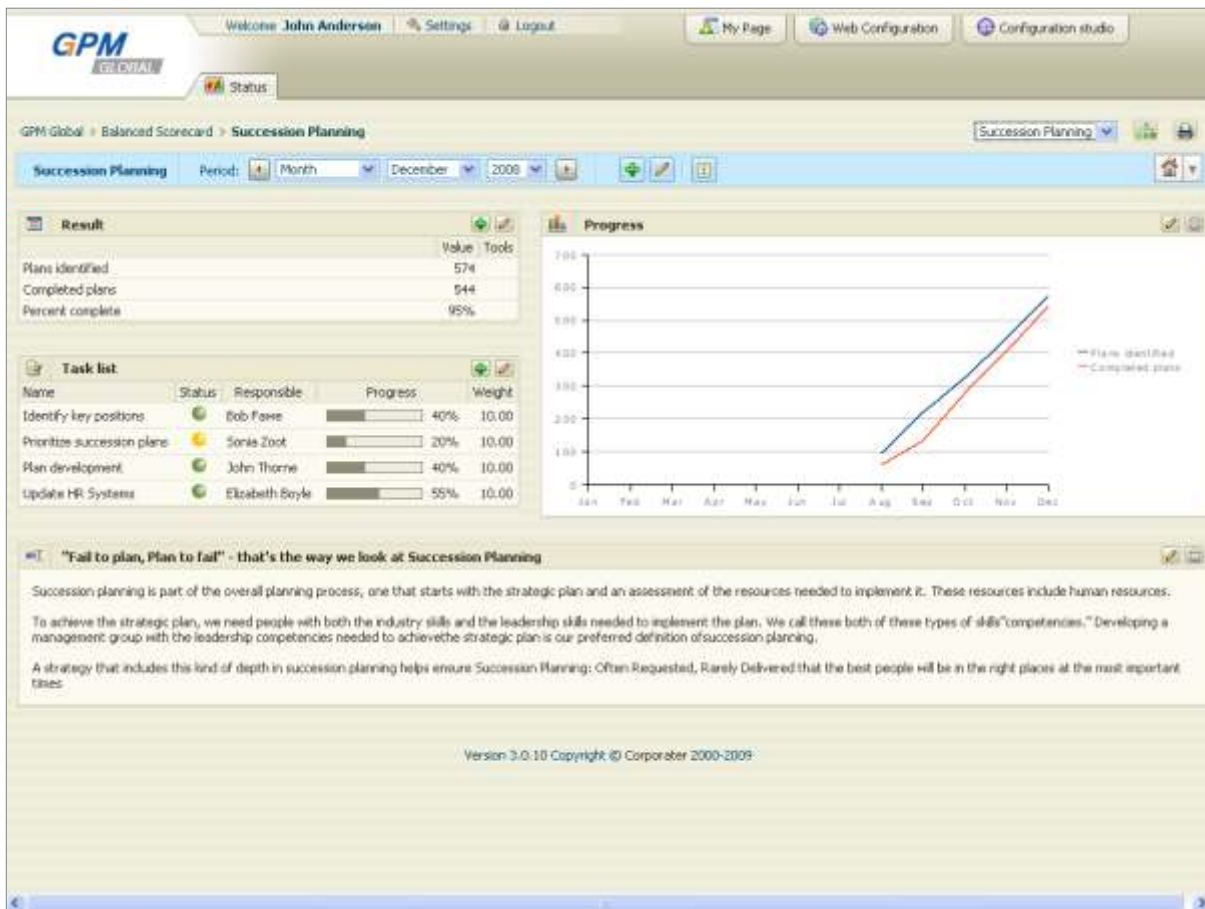


Illustration: Presentation Initiatives, showing both top level and subordinate organisations' Initiatives.

Corporater Reporter

Corporater Reporter is an integrated module for reporting, where information from the scorecard can be merged and distributed throughout the organisation. Separate reports (that may consist of text, Excel files, tables and graphs) can be distributed to individuals and groups. Additionally, the reports may be added to scorecards, perspectives, key success factors or performance indicators.

Corporater Reporter contains separate reports that make it possible to produce ranking lists, reports on goals that have not been reached and reports allowing navigation from a key performance indicator on a higher organisational level to a performance indicator on a lower level. An example can be a ranking list of all units with sick leave over X%, with an option to navigate down on each department for follow-up and detailed information, such as comments, Initiatives and tasks in progress.

Corporater Reporter allows for configuration of content and layout on individual key performance indicators. All reporting options in Corporater Reporter are made available.

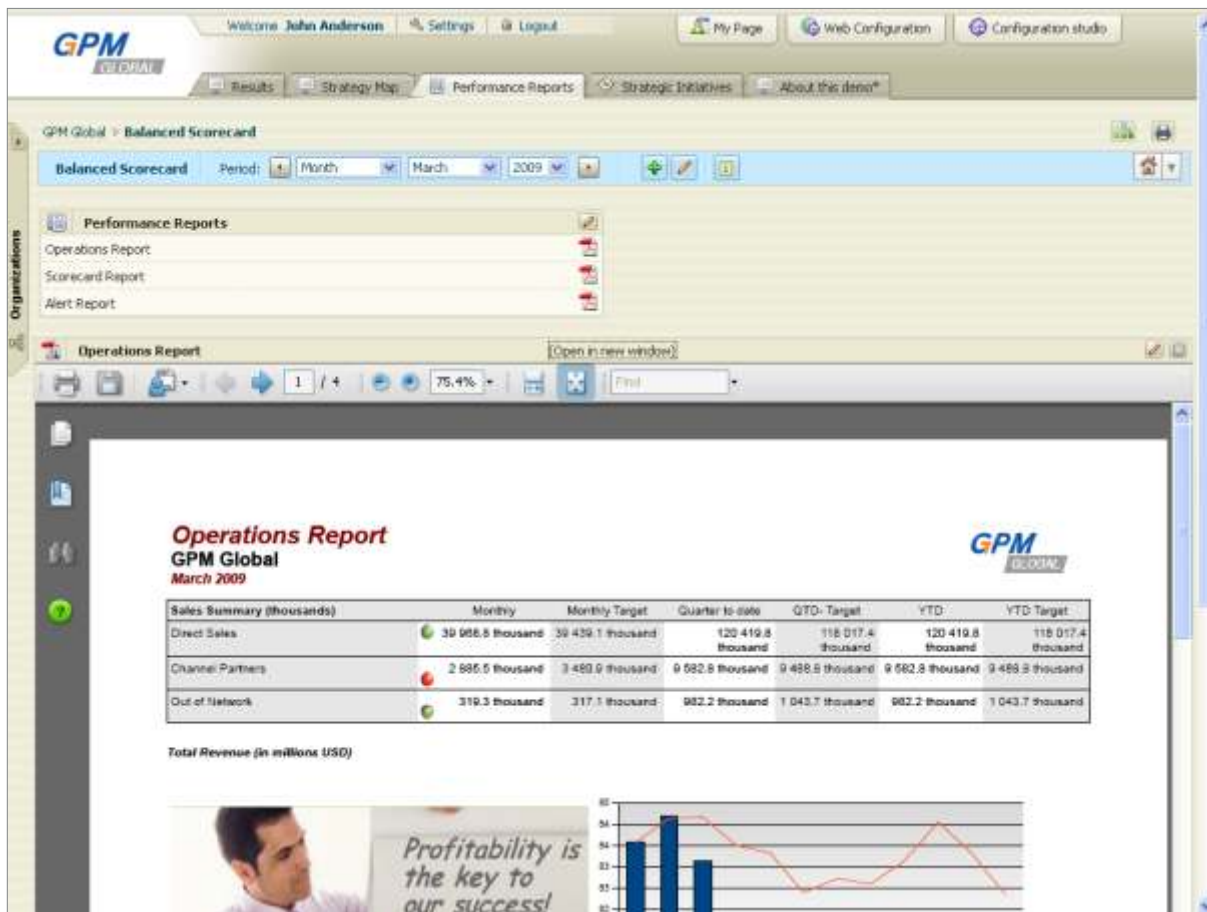


Illustration: Example of a report from Corporater Reporter Designer

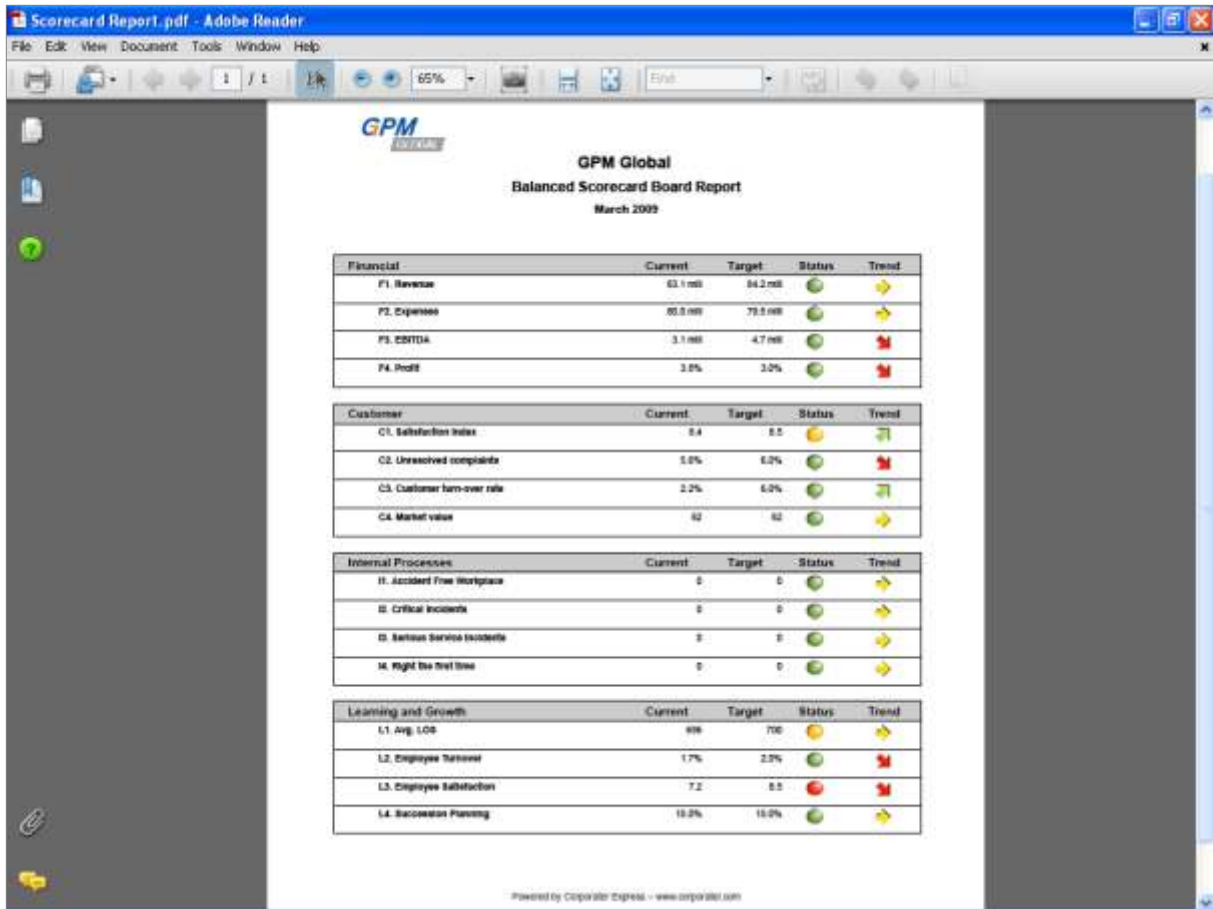


Illustration: Example of a report from Corporater Reporter published to Web.

It is flexible and easy to distribute reports from third party solutions (Excel and other reporting tools) with the use of Corporater Reporter's distribution mechanisms.

Corporater Solution has options for configuring graphs (line and bar graphs) and tables. Reporting functionality is considerably expanded with Corporater Reporter. Corporater Reporter is a comprehensive reporting tool that expands the possibilities for analysis, comparison and presentation. In addition, Corporater Reporter has a powerful solution for distribution of reports to users or groups of users and to scorecards, key success factors and performance indicators and perspectives.

Why Corporater EPM Suite

Corporater vision is: "Business in control". Contrary to many other scorecard vendors, all business rules and presentation logic are configured by the administrator. This implies that all data collection, integration and maintenance require minimal effort.

Low purchase, implementation, and maintenance costs.

Corporater EPM Suite is a standardised solution that does not require customisation or adaptation to individual customer needs. This keeps purchase-, implementation- and maintenance costs to a minimum.

Ready-to-use application, ready for configuration of strategic model.

Our key success factor is a solution that enables the customer to develop and maintain their scorecard solution with a minimum of training. As a result, the use of external consultants is kept to a minimum.

Flexible and powerful solution.

As opposed to many of our competitors who limit your flexibility by constraining you to set dimensions, Corporater Solution uses free dimensions of time, organisation and business. The solution scales very well and can handle more than 1000 simultaneous requests from web-users per second. Additionally, our solution is very user-friendly.

Totality.

Corporater has developed a total concept for Enterprise Performance management, with extensive reporting, external and internal surveys, automated and manual data collection and modelling tools for visualising strategies.

References.

Our overall goal that is reflected in our success can be summed up in two words customer satisfaction. Corporater has a very satisfied customer base and our only focus is on developing the best possible software solution for Enterprise Performance Management methodologies like Balanced Scorecard.

User interface

User-friendliness - end-user

Intuitive design: It has not been necessary to produce a user manual for Corporater end-users at any of our customer sites. The product is so intuitive that users can start using the system after a short introduction. Corporater has made use of professional consultants in connection with establishing the navigating structure and position of information in the user interface.

“Correct start page”: On start-up the user is led directly to “his” scorecard.



Illustration: The front page can be set up with personal information all access, fixed forms, reports and Initiatives/measures/activities users have access to.

Individualised language and terminology: Nothing in the end-user interface is “hard coded”. The software comes with special resource files that make it possible to configure language. For instance, many customers have their own project names. If one wishes to name the project “Result management” instead of “Balanced Scorecard management”, which is standard in Corporater solutions, the change can be made easily by the administrator in the Configuration Studio or by end users with appropriate access levels, using Web Configuration or the Inline Editing. It is important that customers can “dress up” the software with their own terminology. It is also possible to differentiate between users, based on language, if desired.

Relevant information: Through Corporater Reporter's distribution solution it is possible to distribute reports to individual users. For example, a report showing details concerning absence due to illness can be distributed to the Personnel Manager. In addition, the solution contains the best configuration of scorecard access on the market. Thus, it is possible to manage precisely which information is displayed for each user.

Input form for manual data collection: It is our experience that many customers want to collect data manually in a structured and controlled way. Most of our customers' requirements have been taken into account in our manual data collection application (Corporater Forms). The form can be distributed to each person who is to deliver data, and there are also routines for notification and reminders by e-mail.

User-friendliness - Administrator

We would like to emphasize the following that we believe are user-friendly for the administrator.

Easy to model a scorecard by using menus, a non-IT person can easily build a scorecard. Emphasis has been placed on simplicity in maintaining of structures.

Specification of processing rules: An intuitive calculator for specifying business rules/processing rules has been created. The calculator is controlled by using “point and click” and it contains the flexibility which is necessary to define various parameters.

Menu: The functions can be accessed from every screen by pressing the right-hand mouse button. Functions that are used often are easily accessible, while other, more specialised, functions can be found by using the “advanced” buttons.

Re-use: After a scorecard has been created, use the cut and paste functionality to copy it to other corresponding scorecards. For example, it is easy to make a scorecard for one school and adapt 30 copies of it for the other schools in the district. The administrator can also define “global indicator formulas” which can be reused and need only be changed once for a whole group.

Active validation of formulas: Formulas are validated as they are written, by using colour codes. The administrator can see immediately if the formula contains errors, if range values are missing, etc.

Easier updating of major structures: The administrator can make global changes to some global functions which will have effect on all the scorecards in the organisational hierarchy. For example, a new period can be opened for viewing on all scorecards at the same time. This applies to form of presentation, access models, control of formula logic, access control, creation of forms, distribution of forms, etc.

Scorecard appearance: The administrator can control the order in which elements appear on the scorecards. Thus it is easy to arrange the order of perspectives, indicators, details, place of work, etc.

Configuration of elements of information and layout: The administrator can easily configure the contents and layout of each performance indicator,

Control over manual data collection: It is easy for the administrator to view the status of manual data collection by using reports in Corporater Forms. In addition, the administrator can use the software to send automatic or manual reminders about missing data registration via e-mail,

Language

The software uses English as the standard language in the end-user interface. The administrator can change the language for each user if another language is preferred.

All texts in the user interface can also be changed by the administrator so that customers can use their own terminology. For instance, some customers use the term “Measure” instead of “KPI” which is standard in the solutions from Corporater. It is simple for customers to set up their own terminology by updating the language table.

Visual presentation

A set of presentation templates is a standard part of the solution. These templates can be configured for each business unit or scorecard. Other presentation templates can be provided if necessary.

Tabs

Users can create tabs to segregate and present information in an easy to understand manner.

Charts, Graphs and Tables

Corporater Solution makes it easy to set up basic and advanced charts using the Web Configuration or the Configuration Studio. Standard charts take data directly from the measures, while Custom charts have the ability to use data from a table.

Corporater Reporter expands the reporting functionality considerably. Corporater Reporter is an extensive report generator that gives greater opportunity for analysis, comparison and presentation. The Reporter also has a powerful method of distribution that makes it possible to distribute reports to users or groups of users and to scorecards, indicators, key success factors or objectives.

Printing

On printing, all reports are converted to a printer-friendly format that also is adapted for black and white printing. In the printout, the traffic light is displayed using colours and symbols. Corporater has implemented the use of symbols in the presentation of results as a consequence of the fact that 10% of all men are colour-blind.

Presentation on different levels

Data can be presented for all levels in the organisation. Each scorecard can contain data from any level and visualise this,

Degree of detail

It is up to the customer to define the degree of detail for the information that is displayed in each scorecard or when visualising performance indicators. Structures can be drilled down to give details down to the desired level. The customer can easily change the degree of detail as desired. For example, a user survey can be expanded with new questions or degree of detail can be changed from

Free navigation in the structure

It is possible to navigate freely between different levels in the organisation.

Export of data

Corporater Transformer contains tools for exporting any data from the scorecard database. Other tools, for instance DTS, which is a part of MS SQL server 2000, can also be used. Data can be exported from the scorecard database in several different formats, e.g. SPSS or Excel. Users can also use cut and paste from the web. Corporater Reporter contains an extended, flexible and user-friendly "Excel download" with good selection criteria.

Comments and explanations

The indicators have separate fields for adding comments and explanations to the data. In addition, all indicators and threshold values can be described. There are special banners in the scorecards for descriptions and comments.

User guide

There is a user guide in Norwegian for the administrator software. The user interface for end-users is self-explanatory, and separate user documentation is unnecessary.

Descriptions and help texts for the indicators have been implemented throughout the program. End-users can easily see what is behind an indicator, the basis for calculations, when the last survey was conducted, who is responsible for the indicators, limits for the traffic light, etc.

Dialog with users

Users can send e-mail to the owner directly from each indicator. In addition, all users can be given write access to comment fields.

Data collection and processing

Automatic data collection

Data collection can be performed by Corporater Transformer at fixed times using Microsoft scheduler or other similar tools.

Manual data entry

Data can be input manually via the web-interface. There are separate authorisation routines for manual input of data. It is also possible to input data manually in the administrator software (Configuration Studio).

Corporater Forms makes it possible to create your own forms where users simply fill in. Surveyor has powerful functions for distributing forms and reminders about unanswered forms.

Logging of errors and deviations

Errors and deviations are logged in separate files by Corporater Transformer. You can specify your own notifications and error messages which are to be reported if a run does not go according to plan or there are new occurrences. Alternatively, this can be handled by MS SQL server's logging and notification mechanisms.

Processing rules

Processing rules are entered and verified in an intuitive, graphical user interface in the administration software which is comprehensible for non-IT people. From here they can easily be fetched and changed. The processing rules have an online verification function (showing red on error), and it is possible to run a report to see how data is treated, in order to test the processing rules.

Surveys

Corporater Surveyor is the application for conducting simple surveys. For the most part this module is used by our customers to run smaller surveys (quality, service, temperature surveys).

Administration

User profiles and authorisation

Corporater has a very good solution for access control. Access is granted by access groups, and the following limits can be set for each group:

- access to view scorecards
- access to view only some elements of scorecards
- access to view official data
- access to view details for a KPI
- access to view comments and Initiatives
- access to create Initiatives and comments
- access to change visualising templates

Create and delete data elements

With Corporater Configuration Studio it is easy to create and delete elements by using the menu that is activated with the right-hand mouse button, e.g. making it is possible to add a new performance indicators.

The image shows a dialog box titled "KPI" with a blue header bar and a close button in the top right corner. The dialog is divided into several sections with tabs at the top: "Normal" (selected) and "Advanced".

- Name:** A text field labeled "Name" contains the text "KPI". Below it is a larger text area labeled "Description".
- Other info:** A text area labeled "Intention" and a text field labeled "Data source".
- Configuration:** A text field labeled "Responsible" with a folder icon to its right. A dropdown menu labeled "Status algorithm" with "First status" selected. A dropdown menu labeled "Icon" with "None" selected. A checked checkbox labeled "Inherit". A text field labeled "Weight" with the value "10.0".
- Information period:** A text field labeled "Period" with a calendar icon to its right. A dropdown menu labeled "YTD enabled" with "Inherit" selected. A dropdown menu labeled "Period selection enabled" with "Inherit" selected.
- Information:** A dropdown menu labeled "Type" and a text field labeled "Frequency".
- Visibility:** A checked checkbox labeled "Visible".

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

Illustration: Configuring a performance indicator (KPI)

You can enter processing rules via the calculator in the Configuration Studio, which is replete with functions and verifies formulas automatically using colour codes:

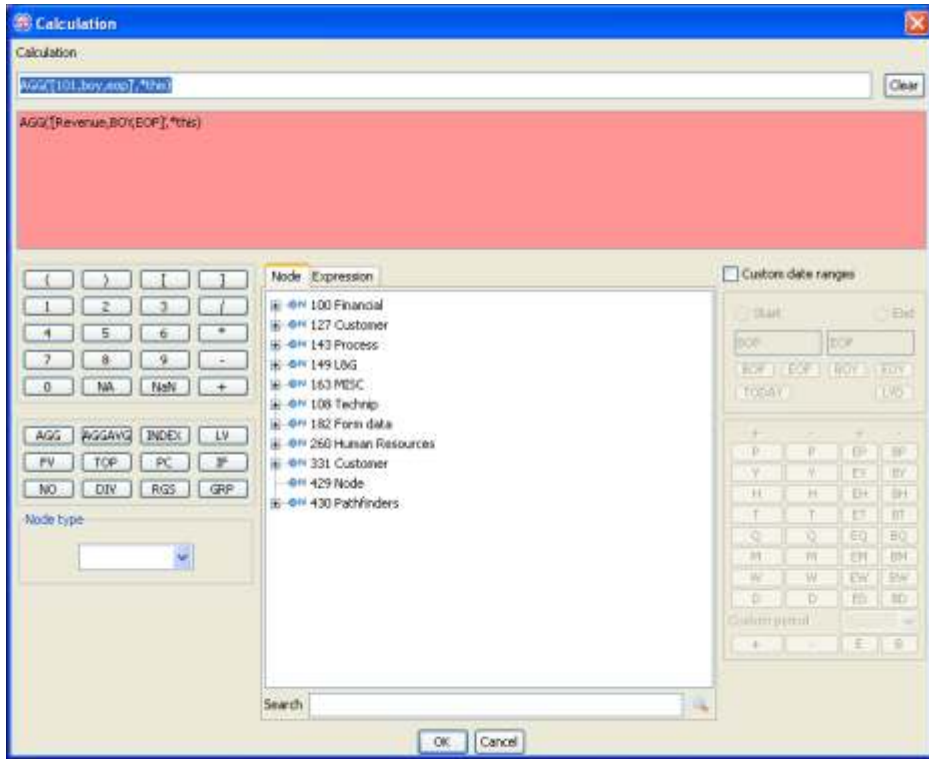


Illustration: Configuration Studio - calculator for performance indicators with invalid formula or formula missing (red verification field)

By using "point and click" you can create a formula which aggregates all the costs for Home based services:

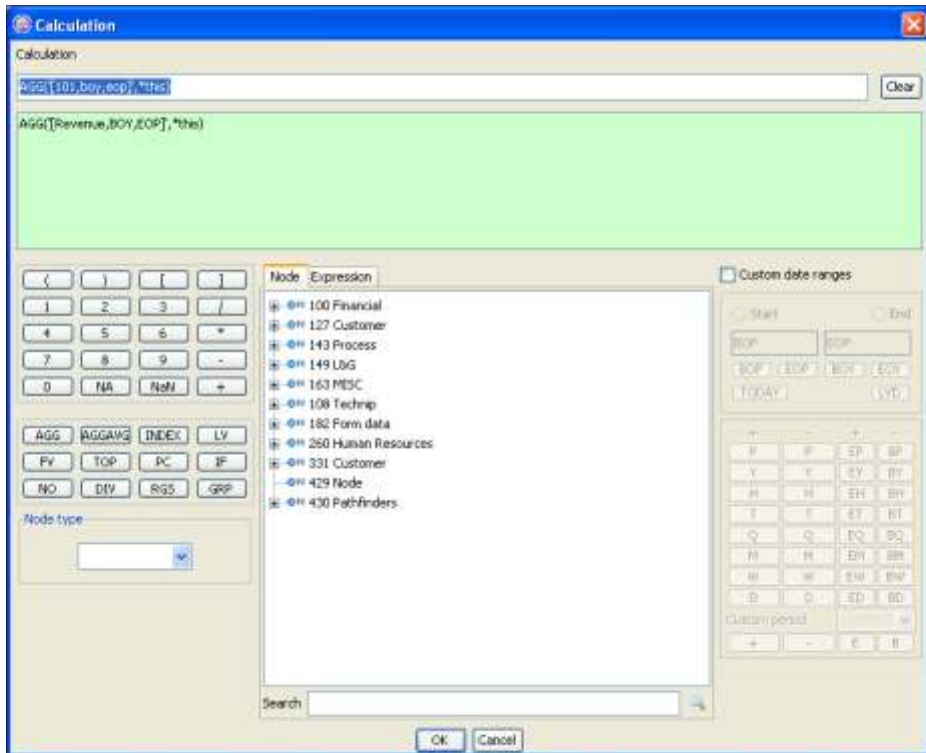


Illustration: Configuration Studio calculator for performance indicator with valid formula (green verification field)

In this example the costs consist of 3 sub-categories. Do the following to add a new category, e.g. a new account for travel costs:

Press the right-hand mouse button and a new account appears.

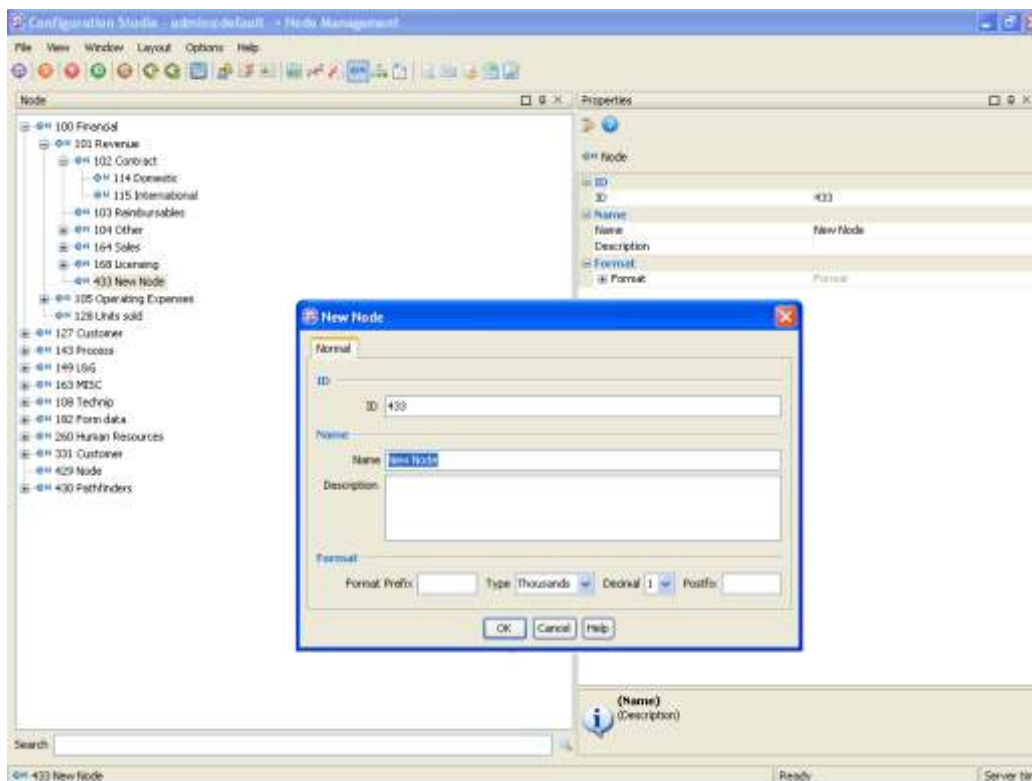


Illustration: Configuration Studio creation of degree of detail (new node)

How to define presentation method and contents

- What is to be presented
- To whom
- Using which layout

What is to be presented:

Scorecards/operational cards/reports

The administrator can freely define the contents of scorecards. The Corporater solution allows more than one scorecard per organisation. Customers usually make use of this functionality to define monthly reports that show the strategic scorecards, while more operational scorecards containing higher frequency data are specified in weekly reports.

Structure:

It is up to the administrator to define the contents of each scorecard. There are no software limitations to the number of perspectives, strategic objectives, performance indicators or details for each performance indicator.

The solution also contains functionality for creating strategy maps. Strategy maps are strategic objectives that are displayed in a cause and effect diagram. This presentation form is very effective for visualising and communicating relationships between scorecards. The Corporater solution contains active strategy maps with active links to the KPIs. In addition, goal achievement is reflected in each objective.

The solution also contains functionality for weighting the KPIs and objectives. Thus it is possible to aggregate results from the KPIs up to the objective level, based on weighting, and further from the objective level up to perspectives.

There is functionality for changing the order of items at all levels in the solution. E.g. if you wish to move the user perspective to the top of the scorecard you can do it easily by using the move up/down functionality.

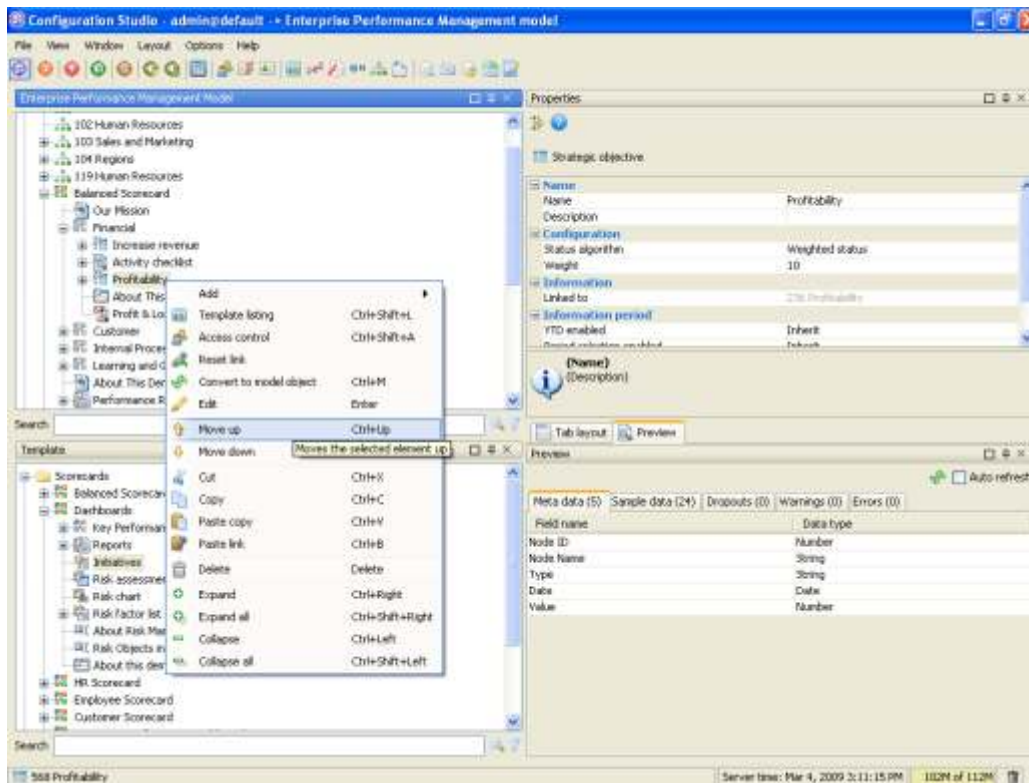


Illustration: Configuration Studio it is possible to change the order of presentation by using the move up/move down functionality.

Key Performance Indicators (KPIs)

For each KPI it is possible to have unlimited variants of a measure. These can be displayed in the same screen. This makes it possible for the customer to present variants of the KPIs and not just one value. The list below shows which KPI variants our customers make use of:

- actual
- actual, year to date
- budget
- budget, year to date
- forecast
- forecast, year to date
- target
- target, year to date
- budget deviation
- budget deviation, year to date
- forecast deviation

- forecast deviation, year to date
- same period last year
- last registered value
- average sub-divisions
- average per day
- average per month
- best district
- worst district
- best period
- rolling 12 months
- rolling X months
- calculated budget (based on an activity price per produced service)

When the administrator defines KPIs, he/she can easily enter texts and descriptions for the additional categories. The information (texts and descriptions) will also be displayed for end-users on the web, in order to improve their understanding of the contents of each KPI.

In addition, the following information can be entered for each KPI.

- Person responsible
- E-mail address to person responsible
- Description
- Reason for emphasizing this KPI
- Data source
- Frequency of measure
- Description of each formula
- Text for each KPI variant
- Time period that each KPI represents, e.g. when the last measuring was done

In addition to figures and text, a graph can be configured for each KPI. Via simple menu choices you can select type of graph and what is to be displayed in the following screen.

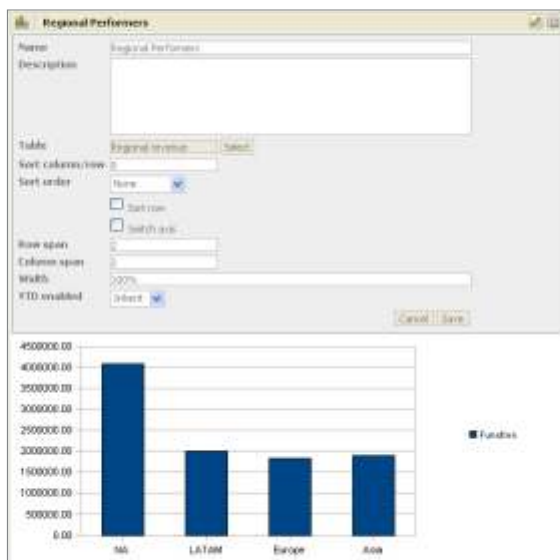


Illustration: configuration of graphs

The administrator can also configure drill-down (drill paths). Where other suppliers have a fixed drill-down pattern that must be followed, Corporater software gives relatively great freedom to define and build drill-down paths to create a best possible drill-down report.

The following functions are available:

- define drill-down report type
- time drill report
- budget deviation report
- customised report
- add organisations/degree of detail to the report
- remove all or part of the basis for detailing
- remove rows containing zero values to make a report more readable
- compare KPIs in the same drill-down report

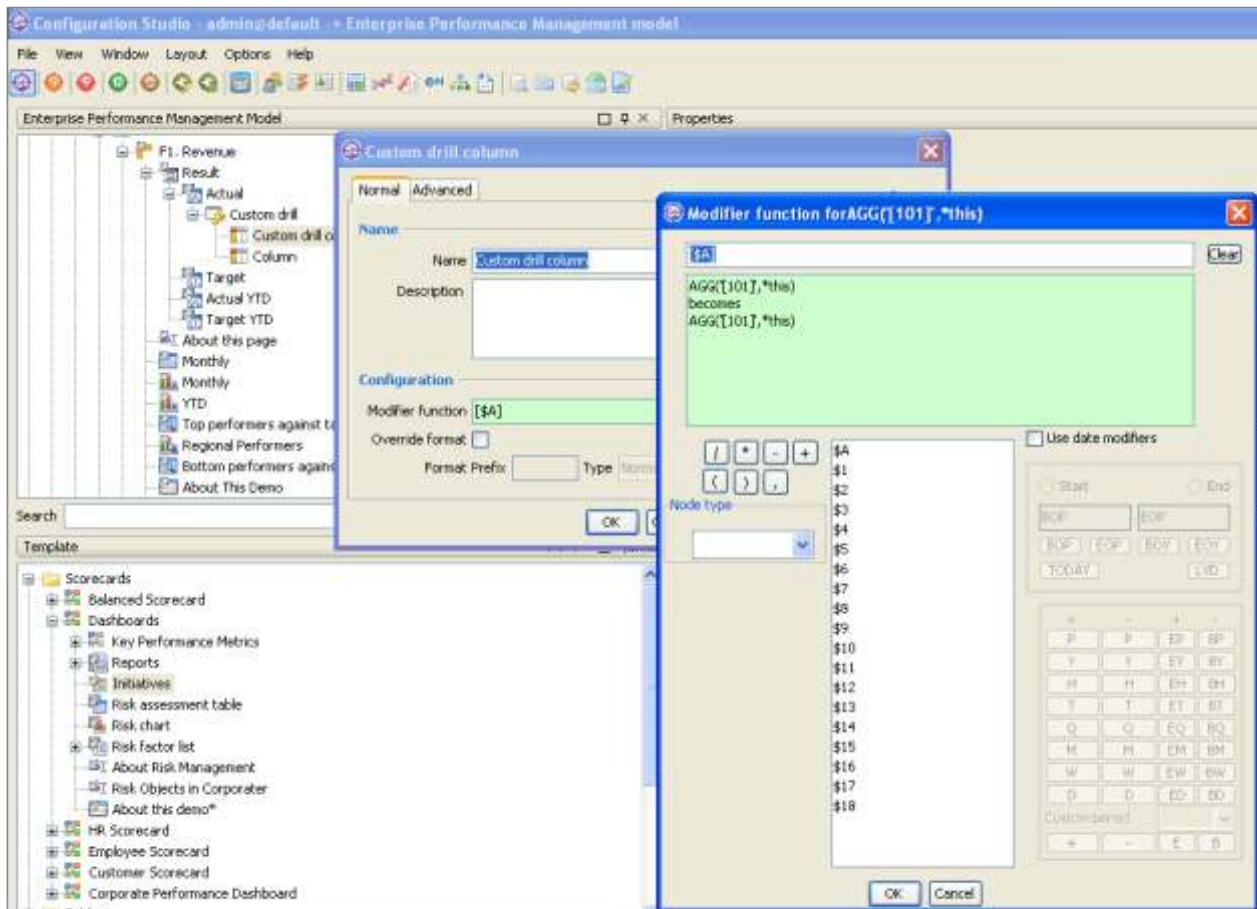


Illustration: Drill configuration

The administrator can easily configure which elements are to be displayed in each scorecard, i.e. whether elements such as graphs, tables and values are to be displayed or not. Corporater Reporter increases the ability to configure even further. E.g. the administrator can configure benchmarking reports, rankings, a generous selection of graphs and tables, links to other pages, documents, scorecards etc.

For whom

Corporater has an effective access control model which allows the administrator to decide who may see what. Each user can select his own standard start-up page if he has access to more than one scorecard.

Presentation form

The administrator can choose from a standard set of presentation templates for each scorecard. Users can set up their own graphical user interface and navigation paths from this interface, in a similar way to using MS PowerPoint.

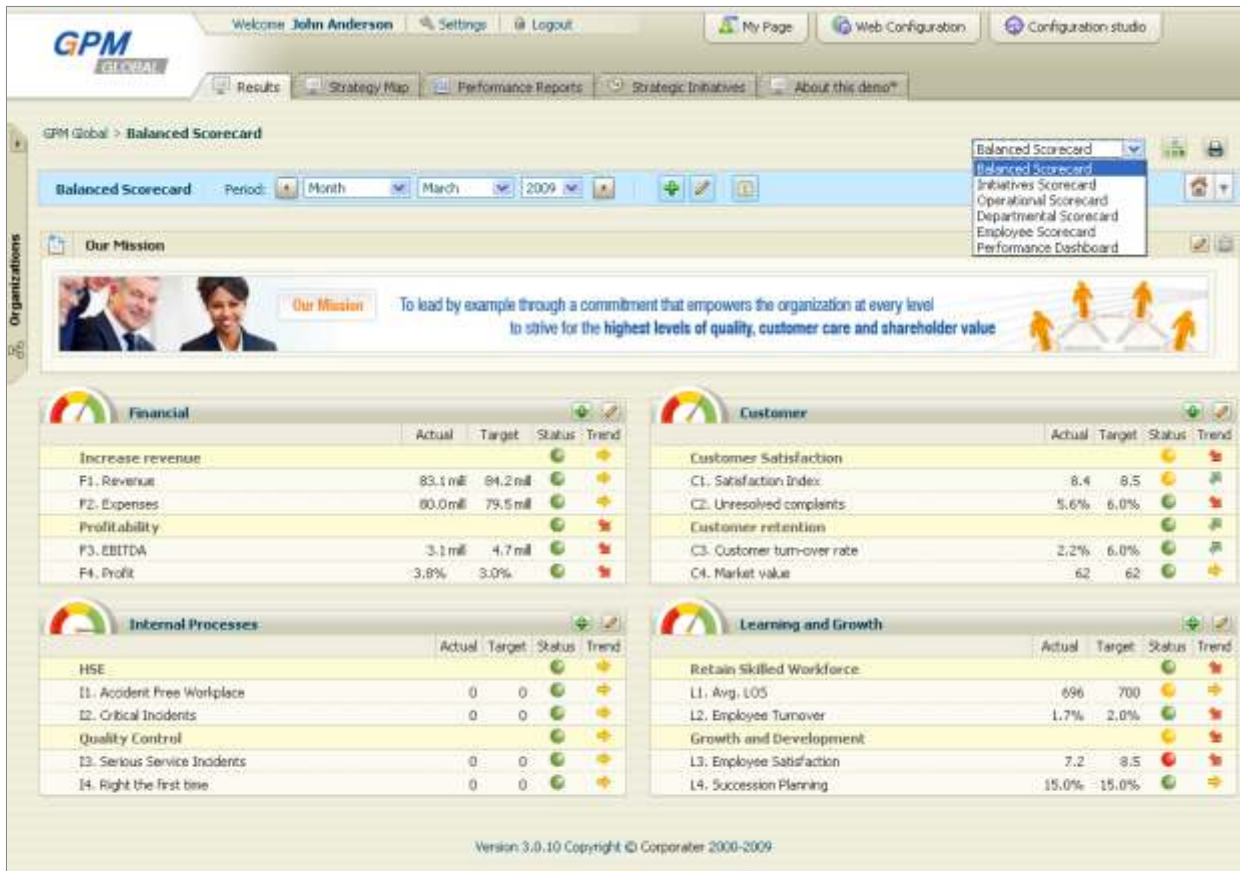


Illustration: End-user interface (web) for one of the templates showing the start-up page for a scorecard.

Adapting the presentation for Internet

The solution can be adapted to present results on the Internet.

Security

Security mechanisms

In the current version, the solution's security mechanism is based on using user ID and password to log on. The password is stored in encrypted form in the database. A user is granted access in accordance with which group he/she is a member of. A user can belong to more than one group. The user's highest access level in the groups he/she belongs to determines the user's total access.

In addition, both JRUN and Tomcat can be set up so that logging on can be rerouted to an LDAP V3 server. This can be configured based on user roles in the LDAP server. User roles in LDAP can be mapped to the application roles in the Corporater solutions.

Access to restrict viewing

The administrator can create access groups for each KPI that restrict viewing. Limitations can be set so that a user may not view a KPI at all, or restrict viewing of details, comments or Initiatives for a KPI. It is also possible to prevent viewing at given times, i.e. that data must be verified before they are published by the administrator.

Access model

Corporater has a very flexible access model built into its solution. The main principles are as follows (following Microsoft's way of thinking concerning granting access):

- Access to scorecards and scorecard elements is given to access groups.
- A user can belong to one or more access groups. Highest access level in the groups a user belongs to determines access.
- The access model determines both access to the administrator software and the web (end-user interface).
- One can choose from a set of access criteria for each object (scorecard, strategic objectives, strategic goals, key performance indicators)
- To create full access rights for all objects, choose full access rights on the next higher level.
- There are 14 possible access choices for each scorecard (viewing, comments, Initiatives, viewing outside the open time period, viewing details, changing layout, etc.)

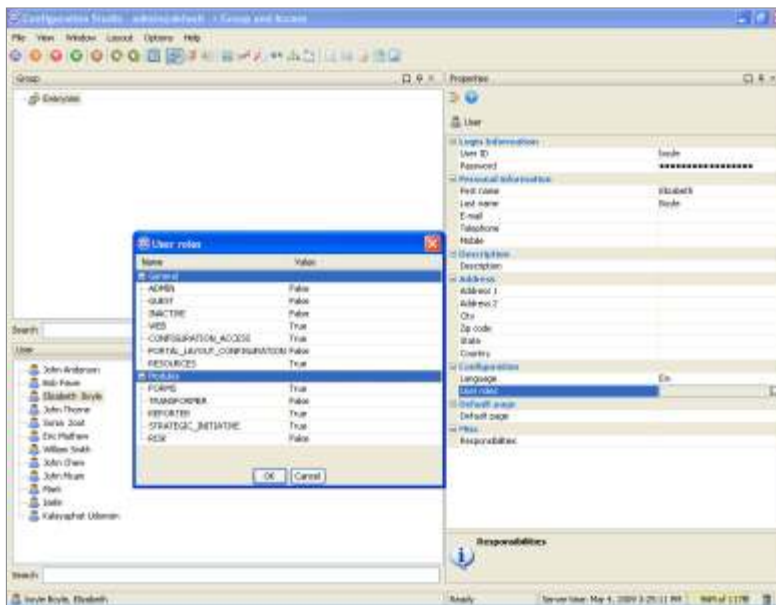


Illustration: Configuration Studio establishing access group rights. Users are entered into access groups, and default resource (start-up Web screen) can be set for each user.

Market experience a tried and true solution

Stable production

Corporater was among the first suppliers of Balanced Scorecard solutions to private and public businesses in Norway. Our first two installations were the cities of Stavanger and Sandnes (municipalities) and were done in 2000. Several of our customers have had our solution in production for a considerable time. See our list of reference installations.



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