

# PRODUCT DESCRIPTION



www.corporater.com

## Table of contents

Table of Contents	1
What is Corporater EPM Suite ?	3
Introducing Corporater	3
What is Balanced Scorecard?	4
The Corporater solution	5
Overview of tools	6
The functions	6
Data collection	6
Defining /configuring the strategic model	7
Visualising	8
The modules	9
Corporater EPM Suite	9
Corporater Configuration Studio (administration)	9
Corporater Web Configuration (web application)	11
Corporater Transformer	13
Corporater Forms	14
Corporater Surveyor	15
Corporater Action Plan	16
Corporater Reporter	18
Why Corporater	20
User interface	20
User-friendliness end-user	21
User-friendliness Administrator	22
Language	22
Visual presentation	22
Graphs and tables	23
Printing	23
Presentation on different levels	23

Degree of detail	23
Free navigation in the structure	. 23
Export of data	. 23
Comments and explanations	. 23
User guide	23
Dialog with users	. 24
Data collection and processing	. 24
Automatic data collection	24
Manual registration of data	. 24
Logging of errors and deviations	. 24
Processing rules	. 24
Surveys	24
Administration	. 24
User profiles and authorisation	24
Create and delete data elements	25
How to define presentation method and contents	. 27
What is to be presented:	. 27
Scorecards/operational cards/reports	. 27
For whom	. 31
Presentation form	31
Adapting the presentation for Internet	31
Security	32
Security mechanisms	32
Access to restrict viewing	32
Access model	32
Market experience a tried and true solution	32
Stable production	33

# 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.

Results	Strategy Map 🛛 Performant	e Report	\$ 10 s	Brategic Initiatives About this deno*			-	-
IPM Gobal > Balanced Scorecard							14	-
Balanced Scorecard Period:	Month 💌 March 💌	2009		* 🖉 💷			1	休
Dur Mission								2
Francial		and the sta	a (J)	est levels of quality, customer care and shareholder		24		
	Actual Target	Status	Trend		Actual	Target	Status	Tre
Increase revenue		•	+	Customer Satisfaction			6	
F1. Revenue	83.1 mil 84.2 n	4.6	•	CL. Satisfaction Index	8,4	8.5	•	-
#2. Expenses	80.0mil 79.5m			C2. Unresolved complaints	5.6%	6.0%	6	
Profitability		0		Customer retention			0	
F3. EBITDA	3.1ml 4.7m	4 6		C3. Oustomer turn-over rate	2.2%	6.0%	6	
F4. Profit	3.8% 3.0%	6		C4. Market value	62	62	6	
Internal Processes				Learning and Growth			4	4
	Actual Target	t Status	Trend		Actual	Target	Ratus	Tr
NSE			٠	Retain Skilled Workforce		0.00	0	-
	0 0		•	L1, Avg. L05	696	700	•	
11. Accident Free Workplace	0 0			L2. Employee Turnover	1.7%	Z.0%	0	
11. Accident Free Workplace 12. Ortical Incidents		0	•	Growth and Development			•	
The second contract of the		-		L3. Employee Satisfaction	7.2	8.5		
12. Oritical Incidents	0 0			Las Estatoyor Jours decort	C 18		-	

Illustration: Example of a scorecard for an organisational unit

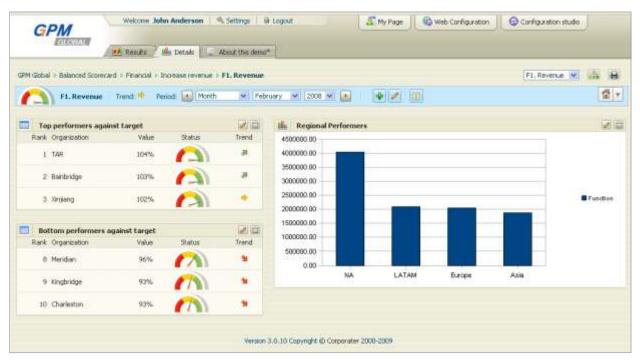


Illustration: Details on a key performance indicator (KPI) with benchmarking

GPM	Welcome Jol	hn Anderson	Setto	nge i litto	gout		A My Pa	9e 🔞	Web Configuratio	0	onfiguration stur	to
	A Result											
IPM Global > Balanced Scorecard	t > Financial > 1	Increase rever	ue > F1. Re	venue > Act	ual						Actual 💌	
Actual Trends	# Period:	Month	/ <b>Y</b> D	scenber 💌	2009 🛩		/ 8	<u>m</u>				2.
Time drill												
Name	January	February	March	April	May	June	July	August	September	October	November	December
🔄 GPM Global	83.6	84.2	85.1	83.2	82.5	83.0	83.5	83.4	83.4	82.3	83.3	83.6
Administrative	1.9	2.1	2.6	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
E 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
PLA .	4.3	4.6	4.1	4.3	4.6	9.2	5.7	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	1.0	2.1
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
E Revenue	83 578,2	B4 169.Z	83 133.6	83 158.8	82 514.8	82 982.9	83 539.3	83 362.3	B3 442.7	82 347.8	83 266.0	83 6 19 1
G 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
Reinbursables	3 502.4	3 605.0	3 567.2	3 590.3	3 604.4	3 504.6	3 590.2	3 604.0	3 606.0	3 605.1	3 593.2	3 611.2
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
E Sales	43 300.6	44 510.6	43 179.6	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
1 Licensing	12 795.8	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	Due	iget	Devia	tion	Actu	al YTD	Budge	t YTD	Deviation
🔄 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.

🛞 F1. Revenue	
Normal Advanced	
1	
Name	
	F1. Revenue
Description	
Other info	
Intention	
Data source	
Configuration	
Responsible	John Anderson
Status algorithm	First status
Icon	None
Inherit	
Weight	10.0
Information period	
Period	
YTD enabled	
Period selection enabled	Inherit 💌
Information	1000
Туре	
Frequency	
Visibility	
0.5.0	
Visible	
	OK Cancel Help

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.

GPM	Welcone John Anderson	Settin	g   0	ogout		K My Page	Web Configuration	Configurat	ion studi	0	
Antendar	Results Strategy Ma	p 📃 Pe	formance	Report	s 🗇 strate	egic Initiatives Abc	out this demo?				
GPM Gobal > Balanced	Scorecard										
								Balanced Scorecard		100	
Balanced Scorecard	Period: Month M	March -	* 2	009 💌		4 1 0		Indianced Scorecard Indiatives Scorecard	1		-
								Operational Scorec Departmental Score		-	
Our Mission								Employee Scorecan	d		2
UUF Mission								Performance Dashb	oard		100
Financial				ł	00	Customer				5	•
		Actual	Target	STATIS	Triend			Actual	Target	Status	Tre
Increase revenu	at ::	Actual	Target	Status C	Triend	Customer Satisfac	tion	Actual	Target	Status	
Increase revenu F1. Revenue	JQ	Actual 83.1 mil	Target 04.2 mil	C C	Trend	Customer Satisfac Ct. Satisfaction Inde	237	Actual 8.4		•	
	ae		-0.00	0	:	and the second s	¢.	8.4		0	-
F1. Revenue F2. Expenses Profitability	JE	83.1 mil	94.2 mil 79.5 mil	0		Ct. Satisfaction Inde C2. Unresolved comp Customer retentio	r. Iaints m	8.4	8.5	0	-
F1. Revenue F2. Expenses Profitability F3. EBITDA	JE	83.1 mil 190.0 mil 3.1 mil	94.2 mil 79.5 mil 4.7 mil	0		CL. Satisfaction inde: CZ. Unresolved comp Existencer retention C3. Customer turn-ov	r. Iaints m	8.4 5.6% 2.2%	6.0%	00000	-
F1. Revenue F2. Expenses Profitability	38	83.1 mili 80.0 mili	94.2 mil 79.5 mil			Ct. Satisfaction Inde C2. Unresolved comp Customer retentio	r. Iaints m	8.4 5.6%	6.0%	00000	-
F1. Revenue F2. Expenses Profit.ability F3. EBITDA F4. Profit	Processes	83.1 mil 190.0 mil 3.1 mil	94.2 mil 79.5 mil 4.7 mil			CL. Satisfaction inde: CZ. Unresolved comp Existencer retention C3. Customer turn-ov	k Iants ni rer rate	8.4 5.6% 2.2%	6.0%	00000	-
F1. Revenue F2. Expenses Profitability F3. EBITDA F4. Profit		83.1 mil 60.0mil 3.1 mil 3.8%	94.2 mil 79.5 mil 4.7 mil	000000		CL. Satisfaction Inde C2. Unresolved comp Customer retentio C3. Customer turn-ox C4. Market value	k Iants ni rer rate	8.4 5.6% 2.2% 62	6.0%		
F1. Revenue F2. Expenses Profitability F3. EBITDA F4. Profit		83.1 mil 60.0mil 3.1 mil 3.8%	04.2 cd 79.5 ml 4.7 ml 3.0%	000000		CL. Satisfaction Inde C2. Unresolved comp Customer retentio C3. Customer turn-ox C4. Market value	k Iants In Tate Ind Growth	8.4 5.6% 2.2% 62	6.0% 6.0% 6.0%		
F1. Revenue F2. Expenses Profitability F3. EBITDA F4. Profit Internal HSE 11. Acodent Pres N	Processes Norkplace	83.1 mil 60.0mil 3.1 mil 3.8%	94.2 mil 79.5 mil 4.7 mil 3.0%	00000 3400		Ct. Satisfaction Inde Ct. Unresolved comp Customer rotantia C3. Customer turn-on C4. Market value	k Iants In Tate Ind Growth	8.4 5.6% 2.2% 62	6.0% 6.0% 6.0%		÷
F1. Revenue F2. Expenses Profitability F3. EBITDA F4. Profit Internal HSE I1. Accident Pres V E2. Orbical Incident	Processes Norkplace	83.1 mil 80.0mil 3.1 mil 3.8%	94.2nd 79.5ml 4.7ml 3.0%	00000 2000	e e	C1. Satisfaction Inde C2. Unresolved comp Customer retention C3. Customer turn-ox C4. Market value C4. Market value	c Isints in rer rate Ind Growth Sciorce Br	8.4 5.6% 2.2% 62 Actual	6.0% 6.0% 6.0% 7arget		÷
F1. Revenue F2. Expenses Profitability F3. EBITDA F4. Profit Internal HSE I1. Acodent Pree V I2. Orbical Incident Quality Control	Processes Voripiace Is	83.1 mil 80.0mil 3.1 mil 3.8%	94.2nd 79.5ml 4.7ml 3.0%	00000 Status	¢ 2	Ct. Satisfaction Inde C2. Unresolved comp Castomer retantin C3. Customer turn-ox C4. Markat value C4. Markat value C4. Markat value C4. Markat value C4. Markat value C4. Castomer turn-ox C4. Markat value C4. Castomer turn-ox C4. Markat value C4. Castomer turn-ox C4. Castomer turn-o	s Isints In Crowth Ind Growth kforce In Spment	8.4 5.6% 2.2% 62 Actual 696	6.0% 6.0% 6.0% 162 Target 700		€ 1 1 1 1 1 1 1
F1. Revenue F2. Expenses Profitability F3. EBITDA F4. Profit Internal HSE I1. Accident Pres V E2. Orbical Incident	Processes Vorkplace Is	83.1 mil 80.0mil 3.1 mil 3.8%	94.2 ndl 79.5 mil 4.7 mil 3.0% 4 Target 0 0 0 0 0 0	00000 2000	e e	C1. Satisfaction Inde C2. Unresolved comp Customer retention C3. Customer turn-ox C4. Market value C4. Market value	c Isints	8.4 5.6% 62 Actual 696 1.7% 7.2	6.0% 6.0% 6.0% 162 Target 700		

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

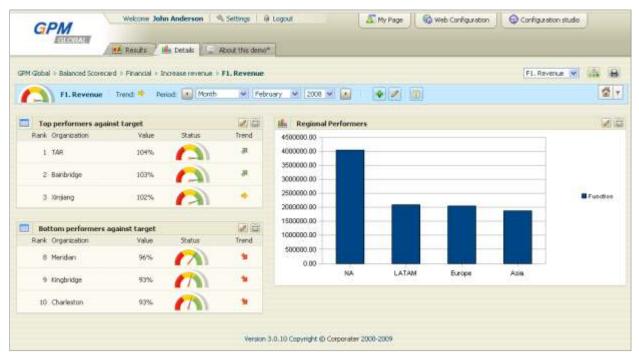


Illustration: page showing details for a performance indicator (KPI) with external benchmarking



## **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.

Configuration Studio - adming	default -> Transfo	rmer design				
File Yen Windon Levaut Option O O O O O O O O		0****	30			
Transformer model	□ ₽ × Transforme	r design		C	× Properties	🗆 4 ×
Cetegory	OFM Glob	al - Frenal museus	Digat	ith ization target	스 (3) 🕢 팬 Excel source	
	8	Oiganizati	ion mapping	e target	Name Description	GPM Global - Excel source
Search	Esce	History Aggregati		opouter System	(Name) (Description)	
	D P X Preview					C # X
	Excel su	arce .				Auto refresh
Generic banners     Reports		(5) Sample data (24) Drop	oute (0) Utamines	(0) Ensure (0)		
🗟 🥁 Contextual banners	Node 3D	Node Name Type	Date (0) Warnings	Value		
🕷 🧫 Logos	195	Production OActual	Jan 1, 2008	1,500		12
Documents	195	Production OActual	Feb 1, 2008	2,000		
woriglace_safety.pdf	196	Production OActual	Mer 1, 2008	4,000		
welness_program.pdf	195	Production OActual	Apr 1, 2008	2,500		
leave_policy.pdf	196	Production OActual	May 1, 2008	2,800		
Profit & Loss statement 2008.	xls 196	Production OActual	Jun 1, 2008	3,500		
GPM Global_data.xls	197	Maintenance Actual	Jan 1, 2008	900		
🕷 🔜 Map Image	197	Maintenance Actual	Feb 1, 2008	1,000		
Demo Resources	197	Maintenance Actual	Mar 1, 2006	950		
Enployee Images	197	Maintenance Actual	Apr 1, 2008	1,500		
Search	197	Maintenance Actual Maintenance Actual	May 1, 2008 Jun 1, 2008	1,100		U U
	110.630	The Render Control Process	501112500			
1228209537406 Excel source			Ready		Server time: Mar 4, 2009 1:56	238 FM 64M of 99M 📳

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.

	GPM	Wekome Elizabeth Boyle 🔍 Settings 🔮 Logout	🥵 Results Page	
_	<b>EREINE</b>	And My Data Entries 🖉 🛅 My Forms 🛛 🅐 My XPEs 💽 My Risks 🖉 My Initiatives 🕴 🧮 My Table		
Ekza	beth's Appraisal f	orm -		
- 0.0	Global			
	ng date: Jan 1, 2008			
ABOX 25.21	JT THE FORM & THE J 005. Elicabeth is a gra	4SEESE: The survey is intended to collect feedback from the supervisor in a wholesome mariner for the "Annual Appraise", de 2 level executive. She reports to John Cheix(Manager of Services dept) . She has over 30 months of experience in the f	Elizabeth Andrews joined th eld, Current salary : \$2500	e organization in 3an /-
8.P	ervisors and those wh	collect feedback in a wholesome manner from personnel concerned. Inspired by the 360 degree feedback model, the surve to work under them. The survey measures the employees on the dimensions of Personal Skibs, Snowledge about the compare epartments. This survey is part of annual appraisal for all permanent and temporary staff of GPM Global Ltd.		
1	Enowledge of the	customer		
	Poor	1		
z	Knowledge of the	product		
	O Poor			
	O Have to improve			
	O Average			
	O Good			
	O Excelent			
3	Attendance of the	employee		
		16		
4	Process complian	CE:		
	O Poor			
	O Have to improve			
	O Average			
	O Good			
	O Excellent			
5	What behaviours	were demonstrated against each competency?		

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.

GPM	Welcome John Chew B Logout	Results Page	Configuration studio
GLOGAL			
	My Data Entries / T My Forms / My KP3s / My Raka S My Datablee - My Table		
Customer Survey for	n)		
IPM Global			
Storing date: Jan 1, 2009	12:00 AM		
1 What were the m	ajor challenges that made you look for a performance management solution like GPH?		
			0
4			2
Please rate your Excelent	overall experience with GPH		
EALENENT (ME)			
Can we use this f	eedback in our marketing activities?		
O Yes			
O No			
4 Other comments	(if any)		
			2
Page 1 of 1			(Friah)
	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.

GPM				My Pag		🕲 Web Configurate	m	
	Tresults Strategy Hap	Performance Reports	Strategic	Initiatives	About	this deno*		_
GPH Global > Balanced	Scorecard						125	
Balanced Scorecard	Period: Month M	March 🛛 🖌 🛛 🔁	•					休
Initiative table							<b>V</b> (0)	
None		Responsible	Start date	End date	Status	Progress		
Succession Planning		Elizabeth Boyle, John Anderson	Jun 12, 2008	May 30, 2009	•		20%	
Safety Launch		Sonia Zoot	Jun 4, 2008	Nov 18, 2010			70%	
Wellness Program		John Thome	Jul 30, 2008	Jan 6, 2010	•	-	100%	
EMPLOYEE WELFARE		William Smith						
Ensure dismissals are for	a potentially fair reason	William Smith	Feb 1, 2009	Oec 31, 2009			70%	
Follow a fair procedure		William Smith	Feb 1, 2009	Oec 31, 2009		-	65%	
Act reasonably in treating	g the reason as sufficient for dismissal	William Smith	Feb 1, 2009	Dec 31, 2009	•		40%	
LEARNING AND GROWTH	1	Kalayaphat Udomin						
Time and territory manag	pement	Kalayaphat Udomiin	Jan 4, 2009	Dec 31, 2009	•		80%	
Buyer behaviour identific	ation	Kalayaphat Udonsin	Feb 4, 2009	Oec 31, 2009			76%	
Reduce time to market		Kalayaphat Udomsin	Feb 4, 2009	Dec 31, 2009	•		69%	
Workflow and notification	i	Kalayaphat Udomsin	Feb 4, 2009	Dec 31, 2009	0		83%	
Training on Financial Stat	rement	Kalayaphat Udomsin	Feb 4, 2009	Dec 31, 2009	•	and the second s	30%	
Matching accounts to invi	enitory - training	Kalayaphat Udomsin	Feb 4, 2009	Dec 31, 2009	0		87%	
Handling complaints and	difficult customers	Kalayaphat Udomiin	Feb 4, 2009	Mar 31, 2009			62%	
Service standards and pr	ofessionalism	Kalayaphat Udomsin	Feb 4, 2009	Mar 31, 2009		-	66%	
Total quality managemen	k	Kalayaphat Udonsin	Feb 2, 2009	Feb 28, 2009	0	1	90%	
Writing quality document	ation	Kalayaphat Udonsin	Feb 2, 2009	Feb 28, 2009	•	and the second s	65%	
Effective communication	across team members	John Mcain	Sep 1, 2008	Mar 31, 2009	•		60%	
Training on personality d	evelopment to employees	John Chew	Dec 1, 2008	Dec 31, 2009			70%	
Ensure project delivery w	whin budgeted time	John Chew	Dec 1, 2008	Mar 31, 2009		and the second s	30%	
Pocus and improve qualit	y of customer service	John Mcari	Nov 1, 2008	Mar 31, 2009	•	-	60%	
						Add Strategic In	Ristive	
						-		

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.

		Status	and a second			_		_	_	_	_	-		00.00
PM Global + Balanced Sc		T I V T ALCO A COMPANY	. Course		AND STOLED	Carl States						Successo	n Planning 👻	
Succession Planning	Per	iodi 🔝 Month	~ D4	cember	₩ 2008	1	4/							출 v
🖺 Result						Ma P	rogress							10
				Va	kue Tools	705 4								
tans identified					574	1.1.1.1								
iompleted plans					944	1995							1	
ercent complete				- 95	5%	3.01 -						- /	1	
						4.02						//		- Hartfrag
Task list						1.000						11		part part
lame	Status	Responsible	Progre	15	Weight	3.94					1	1		
dentify key positions.	0	Bob Farre		40%	10.00	300					-//	R.		
vioritize succession plane		Sonia Zoot	-	20%	10.00	1224-2				21				
Isn development		John Thorne		40%	10.00	100.0								
pdate HR Systems		Elizabeth Boyle	-	55%	10.00				1 1		1	1		
••••••						- 14	i Teli Ha	o Agr A	Mag. 150	ini Au	Lei	ave to Nav	Det	
T "Fail to plan, Pla	total	" - that's the m	au una la cale añ	Europer	tion Manual									20
			0000040988864566			070								
Succession planning is pa	art of the	overall planning	process, one th	ut starts i	with the stra	stegic plan a	nd an assessm	ent of the re	esources nee	ided to impler	nont it. The	se resources i	hickude human n	esturces.
To achieve the strategic management group with	plan, we	need people with Iership competenc	both the indus ies needed to a	ry sids a theyethe	ind the lead strategic pl	ership skills lan is our pr	needed to imple remed definition	ement the pla on ofsuccess	an. We call t son planning	here both of	these type	of shifs"comp	ietencies." Dev	eloping a
A strategy that includes tries	this kind	of depth in succe	esion planning f	olps eneu	ine Soccessi	in Hanning:	Often Reques	bed, Rarely D	Delivered that	at the best pe	ople will be	in the right pl	ices at the mos	t important
					Version 3.0	10 Copyrk	ht @ Corporat	er 2000-2009	19					

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 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.

M Gobal > Balanci	ed Scorecard							100 (e
Balanced Scoreca	and Period: 🚮 Month	♥ March ♥ 2009	* 🖻 🔶	0				1
Performance	Reports		10					
perations Report			12 12 12					
precard Report			2					
ert Report			1					
Operations Re	toort		Open in new windo	a.				1
aperosiono ne	177010	and the second se	Capitol California California	56				
	Operations Report		X Int		-			
<b>b</b>	Operations Report GPM Global March 2009		X [Fut			č	PM	
6	Operations Report		Monthly Target	• Guarter to dote	OTO: Target	C YTD		
•	Operations Report GPM Global March 2009		Monthly Target				Taxonoy	
5 6	Operations Report GPM Global March 2009 Sales Summary (thousands)	Monitriy	Monthly Target	Guarter 10-0000 120 419.8	118 017.4 thousand	YTD 120 419.8 thousand	VTD Target 118 017.4 thousand	
<b>b</b> 6	Operations Report GPM Global March 2009 Sales Bummary (Mousands) Direct Sales	Monthiy	Monthly Target 39 439 1 Proceand	Guarter to dote 120 410.8 Brousand 0 582.8 Mousand	118 017.4 thousand	VTD 120 419.8 thousand 9 582.8 thousand	VTD Target 118 017.4 thousand	
	Operations Report GPM Global March 2009 Sales Summary (thousands) Direct Sales Channel Partners	Monitriy 30 (268,8 thousand 2 (385,5 thousand 2 (385,5 thousand	Monthly Target 39 459 1 thousand 3 459 9 thousand	Guarter to dote 120 410.8 Brousand 0 582.8 Mousand	118 D17.4 thousand 9 498.9 thousand	VTD 120 419.8 thousand 9 582.8 thousand	VTD Target 118 017.4 Browand 9 488 3 thousand	

Illustration: Example of a report from Corporater Reporter Designer

Edit View Document Tools Window Help	Concernation and the	u og less	12.1	Line(1-1	A
	65% -	B CO I LEVE		211	00
	GPM	GPM Global d Scorecard Board Re March 2009	port		
<b>b</b>	<u></u>				
	Financial	Current	Target	Blatter	Trend
	P1. Revenue	63. i mili	84.2 mil	0	<u>م</u>
	72. Expenses	.85.0 milli	79.2.088		*
	P3. EBITDA	3.1 mill	4.7 (68	0	24
	74. Pealt	16	3.0%	•	-
	Customer	Current	Target	Status	Trend
	C1. Saltsfurften Index	8.4	11	6	21
	C2. Unreactived compisings	105	6.0%	•	
	C3. Customer turn-over rate	12%	6.2%	•	71
	C4. Market value	42	82	0	->
	Internal Processes	Current	Target	Status	Trend
	II. Accident Free Montplace	۰.	0	0	*
	E. Critical incidents	1	0	0	*
	D. Bartovas Service Incodente	1	ŧ	0	-
	14. Highl Dee Stell Stee		0	•	->
	Learning and Growth	Current	Target	Status	Trend
	L1 Avg LOB	876	710	0	*
	L2, Englisyee Tettoret	176	2.9%	0	
	L3. Employee Substaction	11	8.5		*
9	L4. Baccenator Playing	10.2%	15.0%	6	-
				-	

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.

ritis Actual 69.1 mil 49.0 mil 20.2 mil 29.2 % 8.4 2.2 %	69.6mil 40.9mil	000	el (/) Trend	Reports Performance Report Deviation Report Operations Report	日本の
69.1 ml 49.0 ml 20.2 ml 29.2% 8.4 2.2%	69.6mil 40.9mil 20.7mil 3.0%	0000	••••	Deviation Report	回日:
49.0 ml 20.2 ml 29.2% 8.4 2.1%	40.9 mil 20.7 mil 3.0%	00	-		
49.0 ml 20.2 ml 29.2% 8.4 2.1%	40.9 mil 20.7 mil 3.0%	00	1		
20.2ml 29.2% 8.4 2.3%	20.7 mill 3.0%		4	Obstantia without	100 100
29.2% 8.4 2.3%	3.0%				
8.4 2,3%		0			
2,3%	8.5				
	10 mm	-	*	Initiatives	145
	5,0%	è		Name Responsible Start date End date Progra	ni 512
0	0	ě	- 2 -	Succession Planning Elizabeth Boyle, John Anderson Jun 12, 2008 May 30, 2009	20%
0	0	ě	- 2-	Safety Laurch Soria Zont Jun 4, 2000 Nev 18, 2010	70%
683	200	-	- 11		100%
1.6%	2.0%	é	1		ingit Initiat
				(#11.30a	regel transfer
		-	- 2 -		
					8
1 (1	<b>5 0</b> 12	5%	9		
		15.3% 15.0%	7.1 85 6 15.3% 15.0% 6	7.1 8.5 ♥ ♥ 15.3% 15.0% ♥ ♥	7.1 8.5 • * 15.3% 15.0% • •

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.

КРІ	
Normal Advanced	
Name	
Name	221
Description	
Other info	
Intention	
Data source	
Configuration	
Responsible	
Status algorithm	
	None
Inherit	
Weight	10.0
Information period —	
Period	II
YTD enabled	Inherit
Period selection enabled	Inherit
Information	
Туре	×
Frequency	
Visibility	
Visible	
	OK Cancel Help
	OK Cancel 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:

Acutation		10	Clea
GQ([Revenue,BO(EOF],*ths)			
	Node Expression	Custors date ranges	
	ON 100 Financial     On 127 Oustomer	10 mile	Đi
7 8 9 -	6 - 4+ 143 Process	DOP. DOP	
7 8 9 - 0 NA NeN +	H 6W 149 L0G H 6W 163 MBIC H 6W 108 Technip	(ROFILEOF) ROFILE TODAY	
AGG AGGANG INDEX LV	in 44 182 Form data	+ +	
FV TOP PC F	01 260 Human Resources     01 331 Customer	I have a service of the service of t	1P
NO DIV RGS GRP	011 429 Node	I have a second second second by an address of the second by the second seco	tr
	10 011 430 Pathfinders	The start start and the start of the start o	8H
lode type		2 Department of the second se second second sec	BO
		<ul> <li>Instantion of the second s</li></ul>	-014
		W T W LEW T	24
		D D m	10
		Color pprof	
		1. t. 1	9

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:

Calculation		
Calculation		
AGG[[101,boy,eop],https]		Clear
AGG([Revenue,BOY,EOP],*the)	Node Expression	Custom date ranges
		O SHALL O BH
	m On 143 Process	fron for
2 8 9 - 0 NA NoN +	# 0** 149 Lb/G # 0** 163 MD/C	(BOF 120F 1 BOF 1/ECK)
	(2004) (395.)	
AGG AGGAWS INDEX LV	4º 260 Human Resources	T
PV TOP PC F	E OH 331 Customer	V F 27 BP
NO DIV RGS GRP	- 011 429 Node = 011 430 Pathfinders	H H EH BH
Node type		T F ET BI
		Q Q 10Q 800 M M EW EW
1		W # 2W 2W
		B I O ED BD
		Classer period
		1 + 1 - 1 e t a
	Search	
	Concerning Concerning Concerning Concerning Concerning	1.01
	OK Cancel	

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.

Node	□ ¢ ×	Properties		D. e X
emit 00 FReenad     emit 00 FReenad     emit 02 Control     emit 02 Control     emit 12 Control     e	Tomat Name Description	Codonal 1 Postfis	433 New Node Parase	
with		(Name) (Cescription)		

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/move down functionality.

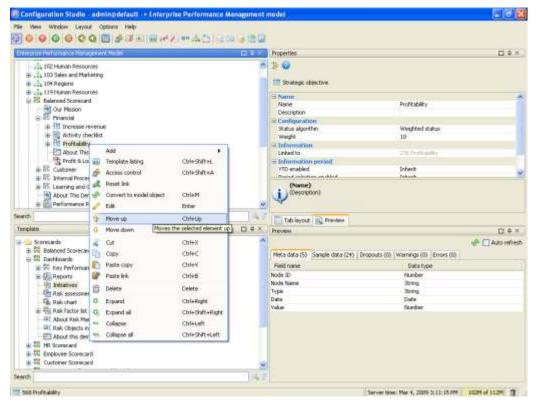


Illustration: Configuration Studio it is possible to change the order of presentation by using the move up/move down functionality.

## **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 donelimits

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.

The Barning Land	atormers				
Nerer Description	Ingunal Perform				
tuble Fort calarminase	Regard trans-	Sand.			
hort calamatere Sert ander					
an orașe					
	D fat me				
townees.	in set the set				
Column sport	1				
wath	500%				
TD makked	adent 💌			Cent	( lave)
4500000.00 4500000.00 4500000.00 9500000.00 9500000.00				Cent	
4500000.00 4500000.00 4500000.00 9500000.00 2500000.00 2500000.00				Canal	E fundaria
4500000 00 4500000 00 4000000 00 900000 00 2000000 00 2000000 00		*	_		
4500000.00 4500000.00 400000.00 300000.00 200000.00 200000.00 300000.00				2000	E fundaria
4500000.00 4500000.00 400000.00 300000.00 200000.00 200000.00 300000.00		27		2	E fundaria
10 mailed 450000 00 450000 00 500000 00 500000 00 250000 00 150000 00					E fundaria
4500000.00 4500000.00 300000.00 300000.00 200000.00 150000.00 100000.00		LETOM	Erge	Carol	E fundaria

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

Enterprise Performance Management Model	0 <del>7</del> ×	Properties	
i a the suit	DCuntum drill cotumn	×	
Actual	Normal Advanced	Modifier function forAGG([101],*this)	X
Column	Nome Eletom chill column	(IA)	Clear
Target Actual YTD Target YTD Actual YTD Actual YTD Actual YTD Actual YTD Actual YTD YTD Top performers against to	Description Configuration Modifier function [\$4] Overnide format	AGG(101],*ths) becauses AGG(101],*ths)	Tuse date modifiers
Regional Performers	Format Prefix Type Item		Cast One
Search	OK.	Node Type \$2	ICF EOF
Template		× #5	10F) (FF) (107) (FF)
<ul> <li>Scorecards</li> <li>Scorecards</li> <li>Bashcord Scorecard</li> <li>Dashcords</li> <li>Exceptor formance Metrics</li> </ul>		94 95 96 97 98 99 910 911 912 913 914 915 916 917 918 919 910 911 912 913 914 915 915 915 915 915 915 915 915	1004/         100           +         +           P         P

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.

Results Strategy Map	E Po	formance i	Report	s 🕑 s	trategic Initiatives				_
PM Global > Balanced Scorecard Balanced Scorecard Period: A Month M	March	<b>Sec</b> 21	009 .M			Balanced Scorecard Infanced Scorecard Infantives Scorecar Operational Scorec		-	-
Dur Mission						Departmental Score Employée Scorecan Performance Dashb	card 1	. (1	21
	) lead by e				ent that empowers the organization at every level at levels of quality, customer care and shareholder val	ue 💦	2	1	
Financial			-Je	0 1	Customer			9	
	Actual	Target	Status	Triend		Actual	Target	Status	Tre
Increase revenue			•	٠	Customer Satisfaction			•	1
F1. Revenue	83.1 m#	84.2 mil	6	•	Ct. Satisfaction Index	8.4	8,5		3
FZ- Expenses	80.0mll	79.5 mil	0	+	C2. Unresolved complaints	5.6%	6.0%	0	1
Profitability					Eustomer retention			0	4
P3.EBITDA	3.1 mil	4.7 mil	6		C3. Customer turn-over vate	2,2%	6.0%	0	4
F4. Profit	3.8%	3.0%	•		C4. Market value	62	62	0	
Internal Processes			1	*	Learning and Growth			ł	<b>e</b> 11
	Actua	I Target	Status	Trend		Actual	Target:	Status	Tre
HSE			0		Retain Skilled Workforce			0	1
I1. Accident Free Workplace			•		L1, Avg. L05	696	700	•	
an Additional for additional		0 0	0	٠	L2. Employee Turnover	1.7%	2,0%	•	1
12. Ortical Incidents			0		Growth and Development			•	1
Quality Control		0 0	0	•	L3. Employee Satisfaction	7.2	8.5	•	1
		0 0			1.4. Succession Planning	15.0%		•	

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 to 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.)

(and		- D 9	* Prosetter	G. #.*
gi Debyon			D O	
	着Uner roles		In Anges & demonstration     More TO     Personnel and encodence     index come	landa Kikubatti Kirab
	New	Mater	Conception .	
Son Andrews Son Andrews Stan Andrews Stan Son Statistics Bayle Statistics Bayle Statistics Sold Statistics Sol	Active -Act	Palas Palas Palas Trus Trus Trus Trus Palas Trus Palas Palas Palas Palas Palas	Address     A	
			1) heppendelites	

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.



#### Europe

IPARK

Norway

#### North America

155 Federal St. 10th Floor Suite 1000 Boston, MA 02110

Phone: +1 (617) 335 0942

South America

San Martin 1009 6to B CP: C1004AAU Buenos Aires – Argentina

Phone : +54 (0) 11 5365 4858

Asia

54, Apex Towers, 2nd Main Road R. A. Puram Chennai - 600028 India

Phone: +91 (0) 44 6457 5347

Email: sales@corporater.com

Phone: +47 (0) 48 15 40 00

Fax: + 47 (0) 51 87 40 71

Prof. Olav Hanssensvei 1

N-4068 Stavanger