QPR Suite 2019

Fast Guide to Scorecards in QPR Portal

This guide provides you with a quick overview to the most relevant functionality related to browsing scorecards in QPR Portal.

Opening Portal & Logging In

Start the QPR Portal by selecting Start -> All Programs -> QPR Suite 2019 Servers -> QPR Portal.

You can login to the QPR Portal by entering your username and password to the fields on the left side. The default user for all QPR products is '**qpr**' and the password is '**demo**'.

Tabs of QPR Portal

There are four main tabs available in QPR Portal:
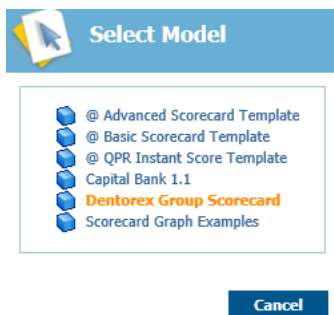**My Contents**: Here you can see e.g. your bookmarks, responsibilities, and briefing booklets published to you.
Processes: Here you can browse process models.
Scorecards: Here you can view measures of your organization's balanced scorecard. This guide focuses mainly on this tab.
Actions: Here you can create and view actions related to process models, scorecards, and to your organization in general.

Selecting Models

To select a model, go to the Scorecards tab and click **Select Model** in the left frame. A dialog for selecting a model is displayed.
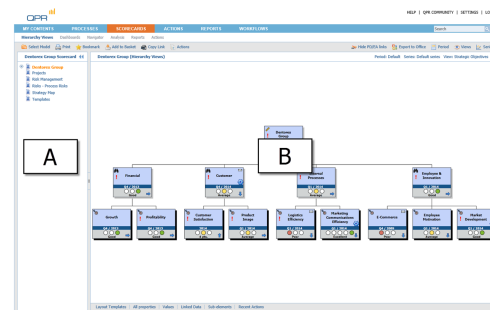

Model selection dialog

Navigation

Navigating the scorecards is easy and straightforward. In the Scorecards view you can select the desired scorecard from the navigation frame (A) and the selected scorecard is opened in the viewing frame (B).

The toolbar buttons function as follows:

Select Model	Opens a model selection window.
Print	Prints the active scorecard view.
Bookmark	Opens the bookmark window. See the next section for more information.
Add to Basket	Add elements from the scorecard view to the basket for later reuse.
Actions	Opens the Actions view showing all actions connected to the current element. See the Commenting and Action Planning section.
Show PG links	Shows/Hides ProcessGuide links from the view.
Period	Select the period used in the view.
Views	Select pre-defined view settings. Views available for the Scorecards and Strategy Maps views are controlled by the QPR Metrics client, but for other views there is a View Designer available for creating customized views.
Series	Select the series used in the view.

A floating Navigation toolbar is also available (depending on the version of the SVG viewer) in the Scorecards and the Strategy Maps view for easier navigation.
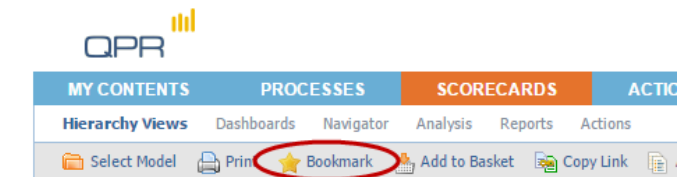
Element View

Clicking the element symbols opens the Element View for the selected element. In the Element View you can see the measure values and define for instance alerts or add actions related to the element. If the element has a shadow, it indicates that it has hidden sub-elements below it in the scorecard hierarchy.
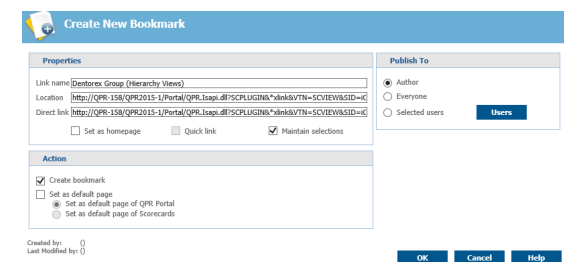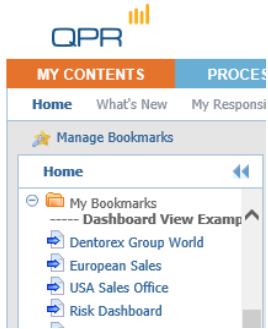

Bookmarking

To bookmark the currently active view, click **Bookmark** in the toolbar above the hierarchy view.

To change the default name of the bookmark, change the text in the **Link name** field. Click **OK** to create the bookmark.

The bookmark is now available in the Home view under the My Contents tab.

Commenting and Action Planning

You can leave comments and create action plans, among other things, related to the measures you are browsing. To add a comment or an action plan, click **Actions**. This opens a view listing all actions connected to the active measure. To add a new action, click **Add**. In the window that opens, select the desired action type from the drop-down list in the upper right corner.

Action editor for an action plan

Fill in the fields and click **OK** – the action is now added to the list.

Inserting Measure Values

The easiest way to input measure is to use the Element View, which you can open by clicking the element's name or the symbol depending on the view. Clicking the **Edit** link at the top of the listed value table, you can open the value editor.
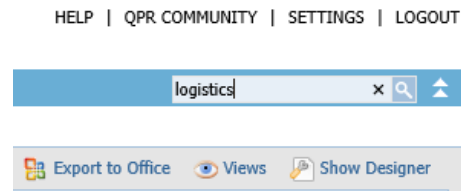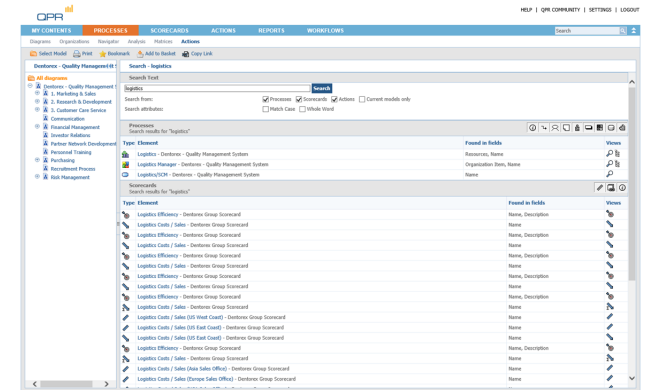

Value editor view.

Another alternative (which is especially useful when updating multiple measures) for editing measure values is using the Navigator view and select the scorecard in which the target measures reside. Click the **Expand** button to expand all nodes and then click **Edit** to activate the editing mode, in which there is an input field for all values you can modify. Verify also that the correct period and series have been selected. The Period and Series selection menus can be accessed via **Period** and **Series** respectively.

Searching

To search for information in QPR Portal, enter the desired search text into the quick search field and click the Search button to perform a search with the terms you entered.

The results of the search are opened into a search view in which you can fine-tune the search to get more accurate results. For example, you can narrow down the search to cover only the currently active QPR Metrics model.

Search results for "Logistics" search

Fine-tune your search with the options shown above.

Ending your QPR Portal session

Select Logout from the upper right corner to log out and end your QPR Portal session. In the case automatic login using cookies has been enabled, you have the option to clear your login information at this point.

For more information, see QPR Community at https://community.qpr.com

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