This guide explains how to describe, communicate, and drive your business strategy and performance using Oracle Scorecard and Strategy Management. It describes how to create scorecards, objectives, initiatives, perspectives, and scorecard documents.

For more detailed information about these and other tasks, see the Oracle BI EE documentation on Oracle Technology Network.
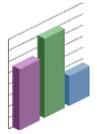
## Creating Scorecards

1. In the global header, click **New**, then select **Scorecard**.

2. Enter a name for the scorecard and an optional description.

3. Specify the location in which to save the scorecard.

4. Specify whether to use the default Balanced Scorecard perspectives. Deselect the **Use Default Perspectives?** checkbox to create custom perspectives with which you will associate initiatives and objectives.

5. Click **OK**.

**New Scorecard**

Choose a name and location for the new Scorecard

Name

Description

Location    /My Folders

Use Default Perspectives?    ☑

OK    Cancel

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myScorecard                    Home | Catalog | Favorites ▾ | Dashboards ▾ | New ▾ | Open ▾ | Signed In As **Administrator** ▾

**Strategy**

    myScorecard

**Overview**

▽ **Initiative Overview: Initiatives**

    Initiatives

    Score

    **Children**
        Initiatives    OK (...)  Warning (...)  Critical (...)
        KPIs    OK (...)  Warning (...)  Critical (...)
    **Descendants**
        Initiatives    OK (...)  Warning (...)  Critical (...)
        KPIs    OK (...)  Warning (...)  Critical (...)

        Perspective
        Business Owner
        Assessment Formula    Worst Case

                                Go to this initiative

▽ **Getting Started**

Overview

Glossary Of Terms

How Do I...?

▽ **Scorecard Breadth**

        Financial
        Non-financial
        Unassigned

        Internal
        External
        Unassigned

        Leading
        Lagging
        Unassigned

**Initiatives**

    Initiatives

**Scorecard Documents**

**Perspectives**

    Financial
    Customer
    Internal Process
    Learning and Growth

**Catalog**

    ▷ My Folders
    ▷ Shared Folders

# Creating Objectives

To create an objective, that is, a required or desired outcome that helps form your corporate strategy:

1. Edit the scorecard and in the Strategy pane:

   - If the objective can be independently achieved, then select the root objective.

   - If the objective is required to meet a higher-level objective, then select the higher-level objective.

2. Click **Create Objective**. The Scorecard Editor: Objective Details tab is displayed.

3. Highlight the default objective name in the top left corner and enter a new name for the objective.

4. In the Analytics pane, specify analytic information (such as the KPIs to be used to measure progress and performance).

5. In the Collaboration pane, specify collaboration information (such as adding comments or a business owner).

6. In the Related Items pane:

   - Add objectives that impact or support this objective by dragging the objective from the Strategy pane and dropping it in the **Causes** or **Effects** table.

   - Add initiatives required to meet the objective by dragging the initiative from the Initiatives pane and dropping it in the **Initiatives Driving This Objective** table.

7. Click **Save**.

**Note:** Objectives and initiatives that you create should be strategically relevant and measurable using KPIs.

# Creating Initiatives

To create an initiative, that is, a time-specific task or project that is necessary to achieve an objective:

1. Edit the scorecard and in the Initiatives pane:
   - If the initiative can be independently achieved, then select the root objective.
   - If the initiative is required to meet a higher-level initiative, then select the higher-level initiative.

2. Click **Create Initiative**. The Scorecard Editor: Initiative Details tab is displayed.

3. Highlight the default initiative name in the top left corner and enter a new name for the initiative.

4. In the Analytics pane, specify analytic information (such as the KPIs to be used to measure progress).

5. In the Collaboration pane, specify collaboration information (such as adding key resources).

6. In the Related Items pane, add objectives that require this initiative to succeed.

7. Click **Save**.

# Creating Perspectives

To create a perspective, that is, a category in your organization with which to associate initiatives, objectives, and KPIs:

1. Edit the scorecard and, in the Perspectives pane, click **New Perspective**. The Scorecard Editor: Perspective tab is displayed.

2. Highlight the default perspective name in the top left corner of the Perspectives pane and enter a new name for the perspective.

3. Click the **Set User** button and select a business owner.

4. Optionally, select **Financial** or **Internal Facing** for the focus.

5. Add related documents.

6. Click **Save**.

# Creating Scorecard Documents

To create scorecard documents, such as diagrams and views that provide different depictions of strategy dynamics and structures (for example, strategy trees and strategy maps):

1. Edit the scorecard.

2. If you are creating a strategy tree, select either the root objective for the entire scorecard or select a specific objective.

3. Click **Create** in the Scorecard Documents pane, then select the scorecard document type, for example, **Create Vision**.

4. Complete the tabs associated with the scorecard document, as appropriate. For example, in the Details tab for a strategy tree, you can specify a description, assign the business owner, and specify related documents.

5. Click **Save**.
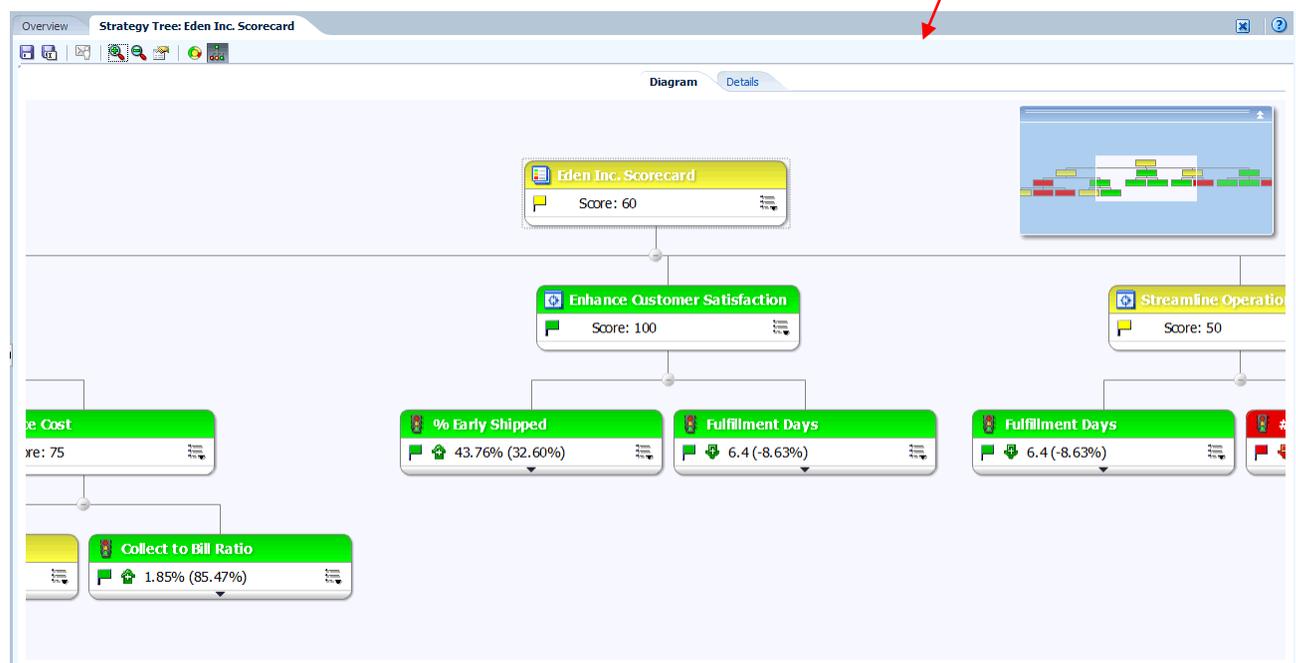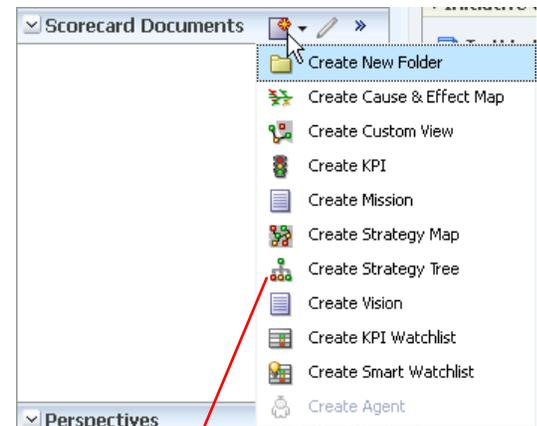
# Opening or Editing Scorecards or Scorecard Objects

1. In the global header, click **Catalog**.

2. Navigate to the scorecard or scorecard object that you want to open or edit.

3. Click **Open** to open the scorecard or scorecard object in view mode, or click **Edit** to open the scorecard in edit mode.

4. If you opened a scorecard in edit mode, then make your changes. If you opened a scorecard object, then click the **Edit Mode Toggle** button, and make your changes.

5. Click **Save**.

**Note:** If you have a scorecard open, then you can double-click an object (for example, a strategy tree or a smart watchlist) to open that object.