

# Metrics Designer for QPR Portal

**Version 2.2.0 (23.5.2015)**

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## 1 Overview

**Metrics Designer for QPR Portal** enables some of Metrics Designer Clients features in QPR Portal. These are create, modify and delete single measures, and mass edit measures. Metrics Designer for QPR Portal is implemented using portal template customizations.

## 2 Compatibility

Compatible with QPR 2015.1.

## 3 Create, modify and delete measures (Navigator and Analysis tabs)

Functionality:

- New buttons **Create measure**, **Modify measure** and **Delete measure** in the details pane.
- When a top element is selected, there is **Delete Scorecard** button instead of Delete measure button. (It's not possible to delete top element without deleting whole scorecard).
- Changing element type is not possible in QPR Web Service, which is why it's disabled when editing existing measures.

## 4 Mass edit measures (Analysis tab)

Mass edit makes it possible to change settings of multiple elements in a same view. Click **Configure Measures** to switch table to editable mode. Click **Save measure settings** or **Cancel configuration** to save modified settings or cancel operation. It's possible to modify measure's

- name
- symbol
- description
- value setting
- period level
- graph template.

Click **Apply to all** icon to copy a setting value to all measures in the view.

Measure unit and periodic accumulation are currently not available. In addition, it's not possible to change series specific information (series measure unit, series periodic accumulation, series input type, series label).

## 5 Installation

1. Apply the template changes in **Metrics Designer for QPR Portal.patch** to **C:\ProgramData\QPR Software\QPR 2015\2015.1\Servers\Templates\WAS\**, or use **WAS.zip** which contains all templates where changes have been applied.
2. Copy **measuremodificationview.tpl** to **C:\ProgramData\QPR Software\QPR 2015\2015.1\Servers\Templates\WAS\Portal**.
3. Copy **copy\_icon.png** to **C:\inetpub\wwwroot\qpr2015-1\qprsoftware\portal\images**.
4. Clear QPR Portal template cache.

## 6 Customize measure edit form

The create/modify measures form can be customized using following javascript variables in `measuremodificationview.tpl`.

**HIDE\_SYMBOL** determines if symbol field is shown (alternatives **true** or **false**).

**FIXED\_NAME, FIXED\_TYPENAME, FIXED\_DESCRIPTION, FIXED\_MEASUREUNITID, FIXED\_VALUESETTINGSID, FIXED\_ACCUMULATIONRULE, FIXED\_PERIODLEVELID, FIXED\_GRAPHLAYOUTTEMPLATEID** can be

- null,
- empty string (i.e. "") (only **FIXED\_DESCRIPTION** can have this value)
- contain a value. (e.g. "some value")

Null means that the corresponding field is visible and users can input a value. Non null value means that this defined value is used instead of user input, and so the corresponding field is not visible at all.

Example 1. If all measures should have period level (e.g.) month, you can set **var FIXED\_PERIODLEVELID = "SC.1938773693.44314"**; meaning that Period level field is not visible and it is set to SC.1938773693.44314 (corresponding object id).

Example 2. If description should be empty, you can set **var FIXED\_DESCRIPTION = ""**; meaning that Description field is not visible and it is set empty.

## 7 Portal screenshots

### Form for creating and editing properties of single measures

The screenshot displays the QPR portal interface with a 'Modify measure' dialog box open. The dialog box is titled 'Modify measure - Internet Explorer' and contains the following fields and options:

- Measure name:** Number of help desk requests
- Symbol:** MEA302
- Description:** (Empty text area)
- Measure type:** Measure
- Measurement unit:** Pieces (0 decimals)
- Value settings:** \_02. Month Minimize (AVG) - MANUAL
- Period level:** Month
- Accumulation rule:** Last
- Graph:** \_Demo (Max, Min, Stab) (month) - Act + Cum

At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons. Below the dialog box, in the main application area, there is a toolbar with icons for 'Create measure', 'Modify measure', and 'Delete measure', which are highlighted with a red box. The background shows a navigation tree on the left and a list of measures on the right, including 'Number of help desk requests'.

## Mass editing listed measures

QPR HELP | QPR COMMUNITY | SETTINGS | LOGOUT

MY CONTENTS PROCESSES SCORECARDS ACTIONS REPORTS WORKFLOWS

Hierarchy Views Dashboards Navigator Analysis Reports Actions

Select Model Print Bookmark Add to Basket Copy Link Cancel configuration Save measure settings Edit Series Period Export to Office Views Show Designer

Capital Bank 1.1 Period: Default Series: Default series View: Default

All scorecards

- Capital Bank
  - Central Branch
  - North Branch
    - Corporate Customers North Branch**
    - Private Customers North Branch
  - South Branch
  - KPI Templates for Portal Library
  - Templates

Name	Identifier	Value settings	Graph layout template	Period level
Absence days	MEA406	_02. Month Minimize ( SUM) - MA	_Demo (Max, Min, Stab) (month)	Month
Assets under management	MEA111	_01. Month Maximize (AVG) - MA	_Demo (Max, Min, Stab) (month)	Month
Complaints per Customer	MEA204	_02. Month Minimize (AVG) - MAN	_Demo (Max, Min, Stab) (month)	Month
Corporate Customers North Branch	TOP	_Top element	_Demo (Max, Min, Stab) (Q) - Act	Quarter
Customer	PER2	_Top element	_Demo (Max, Min, Stab) (month)	Month
Equity capital	MEA116	_01. Quarter Maximize (AVG) - M	_Demo (Max, Min, Stab) (Q) - Act	Quarter
Financial	PER1	_Top element	_Demo (Max, Min, Stab) (Q) - Act	Quarter
Handling time of lending decisions	MEA301	_02. Month Minimize (AVG) - MAN	_Demo (Max, Min, Stab) (month)	Month
Improvement suggestions	MEA403	_01. Month Maximize (AVG) - MA	_Demo (Max, Min, Stab) (month)	Month
Internal Processes	PER3	_Top element	_Demo (Max, Min, Stab) (month)	Month
KPIs	MEA110	_Top element	_Demo (Max, Min, Stab) (Q) - Act	Quarter
Learning & Growth	PER4	_Top element	_Demo (Max, Min, Stab) (month)	Month
Net loan losses	MEA123	_02. Quarter Minimize ( SUM) - M	_Demo (Max, Min, Stab) (Q) - Act	Quarter
Net revenue	MEA121	_01. Quarter Maximize (SUM) - M	_Demo (Max, Min, Stab) (Q) - Act	Quarter
Number of Customers	MEA203	_01. Month Maximize (AVG) - MA	_Demo (Max, Min, Stab) (month)	Month
Number of help desk requests	MEA302	_02. Month Minimize (AVG) - MAN	_Demo (Max, Min, Stab) (month)	Month
Operating profit	MEA124	_01. Quarter Maximize (SUM) - M	_Demo (Max, Min, Stab) (Q) - Act	Quarter
Other expenses	MEA1221	_02. Month Minimize ( SUM) - MA	_Demo (Max, Min, Stab) (month)	Month
Personnel risks	RISK100	_Year Risk Minimize - CALCULATE	Risk Consolidated	Year
Profit & loss	MEA120	_Top element	_Demo (Max, Min, Stab) (Q) - Act	Quarter
Risk-adjusted profit	MEA125	_01. Quarter Maximize (SUM) - M	_Demo (Max, Min, Stab) (Q) - Act	Quarter

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Layout Templates | All properties | Values | Sub-elements | Recent Actions