

# MANAGEMENT REPORTING: CLEARPOINT'S SPRING CLEANING GUIDE



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# INTRODUCTION

For years, ClearPoint has helped hundreds of organizations take back control of their management reporting process. Over the years, as these organizations get more nimble with reporting, their requirements for ClearPoint change.

They introduce more calculations, evaluations, and different summary reports. They add new fields, stop using old fields, and improve their reporting process. As they get more nimble with management reporting, they also get more nimble with ClearPoint.

The most successful organizations document their reporting process well, and keep ClearPoint clean and up to date. The purpose of this eBook is to walk you through the spring cleaning process in ClearPoint.

This will not only to help you tidy up your account and make life easier for your users, but more importantly, help you improve your management reporting. After all, isn't that why you purchased ClearPoint in the first place?

We recommend that spring cleaning occur immediately following the end of your fiscal year, as this is a perfect opportunity to address the effects that new strategic plans can have on your ClearPoint account.

To help guide you through this process, we have broken up this document into eight distinct categories, each focusing on a separate area of your account. The topics we have chosen to cover throughout this eBook have been heavily influenced by two things.

The first, is our expertise in management reporting.

The second, and the most important, are the best practices we have seen from our various clients who we see go through this rollover process on an annual basis.

Accompanying each chapter you will find a series of links to help articles included in our Support Center, to help walk you through the steps we lay out in each section.

Additionally, we include a checklist with each chapter, to help you ensure that your organization is accounting for each step in the spring cleaning process.

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# CHAPTER 1: PRESERVING YOUR INFORMATION IN CLEARPOINT

So, we are about to walk you through all of the necessary steps for tidying up and properly managing your ClearPoint account at the annual rollover. But, you may be wondering, “if I am going to be ‘cleaning’ my account, how do I make sure that none of my old information gets lost?”

Good question! One of the many great things about ClearPoint is that it offers several ways to preserve the historical information and data that has been entered into the various scorecards across your account.

Before you begin your spring cleaning process and start reworking all of your settings, take advantage of these options! They are quick and easy, and will ensure that you can refer back to old data while still keeping your account organized and user friendly.

The first way to preserve this old data is what we call “snapshots”. This option allows you to preserve your entire account in view only form, and is a great option for those looking to preserve the entire account in its current state before making widespread changes.

Once you have created the snapshot, you will receive a notification email that the snapshot is complete, at which point you can determine which users you want to have access to the snapshot. Then, once you log in, you will be prompted to select whether to view your live account or the snapshot.

The second option for preserving your old data is to duplicate and lock your old scorecards from the previous year. This is a great option for those using yearly scorecards to track their strategic plan, or for those who want to make changes to a scorecard while keeping track of what it looked like previously.

Once you have successfully duplicated the scorecard, you can then lock it to prevent any further changes from being made to edit or update fields.

These options for preserving your historical data take barely any time at all, but they are a great way to ensure that none of the changes you make going forward will affect or mess up any of the work you have done from the previous year.

Now that all of your old data is safe and secure, it's time for the real spring cleaning to begin!

## ClearPoint Support

- [Preserving historical information in ClearPoint](#)
- [Locking a scorecard](#)

# CHAPTER 2: PERIODS AND REPORTING FREQUENCIES

Once you preserve your information from the previous year, you will need to focus on properly managing and organizing your reporting periods and reporting frequencies for the new fiscal year.

Reporting periods are the backbone of any reporting solution, so this step is important. Unnecessary and outdated periods and frequencies left stranded around the account can cause confusion amongst your users, and will ultimately lead to huge and unwanted amounts of clutter.

Taking the time to manage this on a yearly basis is a quick and easy way to tidy up your account.

## Add New Periods

While adding in your new reporting periods, there are three important pieces of information to keep in mind.

1. Add the entire year at once. Get it out of the way early on, rather than adding each period throughout the year as you go. To streamline this process, take advantage of the 'Add Multiple' feature, rather than wasting time by adding each period on its own.
2. Keep the names uniform. We strongly suggest mmm-yy (ex. Aug-17). If there is another way that your organization prefers to format its reporting periods, that is fine, as long as you ensure they are all the same.
3. Avoid making your new periods scorecard specific unless you really have to (and usually, you don't). It is typically unnecessary, and like switching up the format of your period names, will only confuse your users.

## Archive Old Periods

ClearPoint offers several great options when it comes to archiving old periods.

- **Hidden Periods:** If you choose to set a period as a 'Hidden Period', it hides the period everywhere except the 'Reporting Periods' page in ClearPoint. This means it is hidden from the Period Selector, hidden from all measure data tables, and is not available to use in reporting frequencies.
- **Non-Reporting Periods:** If you choose to select 'Non-Reporting Period', it hides the period from the Period Selector, but you can still use this period in data tables and reporting frequencies.
- **Locked:** Periods can also be set to 'Locked' if no further changes should be made. By locking a reporting period, administrators can monitor data entry and updates at the end of reporting periods. Periods can be locked globally or on a by-scorecard basis using scheduled lock dates.

Do not delete periods unless you are sure you will never need the information in those periods again. Deleting a period also deletes all the information (qualitative and quantitative data) entered in that period.

## Manage Reporting Frequencies

Assign all newly added periods to the appropriate reporting frequencies. For some periods, this means adding to multiple reporting frequencies.

One thing to avoid is adding new reporting frequencies for every year. Instead, build onto the existing frequencies, such as monthly or quarterly, by adding the new periods and hiding or archiving the old ones.

For example, if you already have an 'Annual' reporting frequency set up, simply assign your new periods to that reporting frequency, rather than setting up an additional 'Annual' reporting frequency.

This will also save you a significant amount of time, because it means you will not have to go back and adjust the reporting frequencies of each of your elements.

## Fiscal Years

If your organization's fiscal year is not set up correctly, it can negatively impact the calculations that you have set up in ClearPoint relating to your fiscal year (ex. Fiscal YTD calculations), and subsequently will skew your data.

Don't let this scare you though! Defining your fiscal year in ClearPoint is a quick and easy process. By defining your fiscal year in ClearPoint, you will then be able to do really powerful calculations such as FYTD of an Actual series, and subsequently display Fiscal YTD periods in your charts and summary reports.

Properly managing your reporting periods and frequencies on an annual basis may seem like a pain, but in the long run you will be grateful you did. We have seen how neglecting this section of a ClearPoint account can cause huge amounts of extra work and wasted time for our clients, and managing this on a yearly basis will help you avoid this.

## ClearPoint Support

- [Adding a reporting period](#)
- [Adding multiple reporting periods](#)
- [Period options \(default, hidden, non-reporting periods\)](#)
- [Adding and editing reporting frequencies](#)
- [Using fiscal years in ClearPoint](#)



# CHECKLIST

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- Add new periods
- Update reporting frequencies with new periods
- Archive old periods
- Define fiscal year

# CHAPTER 3: REPORTING CALENDAR

## Elements of Your Reporting Calendar

At the annual rollover, we recommend updating your calendar to include all important dates. This includes:

- Dates for every meeting in the upcoming year
- Due dates for report data
- When each period is locked from future updates
- When important reports are generated.

This helps to increase accountability across your organization, as employees have clear visibility on important dates. We also suggest that for hard deadlines, you include a specific time during the day that data is due, such as 5:00 PM.

Schedule a strategy meeting with the appropriate members of your team to decide when each meeting and deadline should be. Once determined, share the finalized calendar with the rest of your team or department before focusing on anything else.

Updating the calendar for your new fiscal year does not have to take a ton of time or effort, but it has the potential to save you enormous amounts of time and resources in the long run.

## Your Reporting Workflow

Once you select your dates for the year, it's time to set up your Reporting Workflows in ClearPoint. You'll end up creating a Reporting Workflow for each reporting cycle, but start with getting your first one completely set up, and then duplicate it for each other period.

First, create your Reporting Workflow with start and end dates for when users should make their updates.

Next, add your Workflow Emails. These automated emails are a valuable tool when set up correctly, as they help ensure that users are reminded to update their respective elements at the appropriate times.

If users forget to make their updates, incorrect data is reflected in your reports, and your strategy suffers as a result. To avoid this, manage your reminders at the annual rollover and update the appropriate settings to help your team follow along on your organization's reporting calendar.

Set up an initial email, and then a second email for anyone who still has updates to make before the deadline. This is a great way to increase accountability across your organization.

With your reporting calendar established and Workflow set up, schedule your data uploads. With the Data Loader, you can upload quantitative and qualitative information into ClearPoint each cycle. Most of the time, data uploads are scheduled for the first day of the month.

The last thing to add to your Reporting Workflow is the date you want to lock your periods. After this date, your users can no longer make updates. You can review the information and know exactly what is in each report.

Once you've added these important dates to your Reporting Workflow, you can see them on your calendar in ClearPoint.

In chapter 6, we will talk about adding your report schedules to your calendar as well. You can duplicate your first Reporting Workflow for each of the other reporting cycles for the year, making it quick and easy to set them all up at once.

## ClearPoint Support

- [Reporting Workflows Care Package](#)
- [Reporting Workflows](#)
- [My Updates](#)

# CHECKLIST

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- Choose dates**
  - Meeting dates
  - Due dates for data
- Share calendar with team**
- Set up Reporting Workflow**
  - Workflow Emails
  - Data uploads
  - Period locking
- Duplicate workflow for each reporting cycle**
  - Set data upload schedule for the year
  - Define period lock dates for the year

# CHAPTER 4: SYSTEM CONFIGURATION

As you know, part of what makes ClearPoint such a powerful tool is how customizable it is and how easily it can be adjusted to fit your reporting needs - not the other way around.

This means that we allow you to customize reporting fields, layouts, style, and more to match your organization's unique brand and needs. While this is great, your account can become messy and cumbersome if you do not address and tidy up these customizations and various system settings at your annual rollover.

## Default Page Layouts

Setting default page layouts sets a standard layout for the detail pages of newly created elements, so that everything in your account looks uniform. Default layouts can be set for objectives, measures, initiatives, milestones, action items, and risks.

At the annual rollover, think about how your pages in ClearPoint were set up the previous year, and if any changes need to be made in order to keep your information more organized or easier to edit for your users.

If so, make the appropriate changes to your default layouts. If not, no need to fix what's not broken! Keep them as is. We recommend using layouts that make it clear to users which fields need updating. Keep in mind that the default layout field will only apply to newly created elements.

## Default Series

Address your default series as well, otherwise known as the columns of data that are tracked over time in the measure data tables. By default, each new measure in ClearPoint includes an 'Actual' and 'Target' series in currency format, but this can easily be changed based on what your organization is looking to track.

If you are looking to track a 'Year to date' series for your upcoming fiscal year, for example, the annual rollover is the time to add this in as a default series in your account.

It's also important to note that adding, removing, or changing the default series of newly added measures will not affect your existing measures - so no need to worry about losing or messing up data from previous periods.

## Custom Fields

As you already know, users can add various qualitative and quantitative information into default fields, such as description or analysis. If you would like to further customize your ClearPoint account, however, you can also create custom fields.

These fields can have unique names, live in the scorecards of your choosing, and have one of many format types. You likely will have already set up some custom fields by the time the annual rollover occurs, so this is the time to clean up the ones that will no longer be of use to you in the upcoming fiscal year, and add in the new ones that you will need.

Deleting the old custom fields will not only reduce clutter, but will also help to avoid confusion amongst your basic users who aren't sure what the empty fields are for or which fields they are supposed to edit.

## Pods And Table Styles

You may have several customizations already set up in this area. If this is the case, be sure to delete the old ones that you don't need. If you don't have any custom pod or table styles set up, create some new ones for the upcoming fiscal year!

Using CSS, ClearPoint allows you to customize the look and color of your pods and tables in order to help your reports better match your organization's unique branding.

We encourage you to take advantage of our Support Center when getting into this area, as our help articles will give you a better sense of the customizations that are available to you to make your account look exactly how you would like it, and walk you through the process of creating these changes step by step.

## Calculated Fields

Calculated fields allow you to display series as columns in summary views, which allow you to display the data from various periods in your measure summary reports.

As with your other customizations in ClearPoint, be sure to only keep the ones you need for the upcoming fiscal year and delete the rest. Unnecessary calculated fields that are no longer being used can also clutter up the column selected section when building measure summary reports.

## Data Loader

If your organization is using the Data Loader, we encourage you to take some time at the annual rollover to evaluate all of the packages you have set up, and purge the ones that are outdated or no longer of use to you.



We also suggest that you look into the ownership of each package, and make sure that each package is still in the right hands at the annual rollover. Also check with your package owners on when they update their data.

If it is always at the same time, encourage them to create some schedules to save themselves time! One of the many great things about ClearPoint is that it gives administrators a lot more insight into what is going on in the Data Loader world at their organizations.

## Admin Options

While these are all important aspects of system configuration to keep in mind at the annual rollover, there are several other customizations that we offer in ClearPoint that you should tend to.

We encourage you to go through the various tabs in Admin Options at the annual rollover, depending on which ones your organization takes advantage of, and tidy up any of the ones that are being used in your account. Remember, your account can never be too clean!

## ClearPoint Support

- [Setting default page layouts](#)
- [Editing objective detail pages](#)
- [Changing the default series included in a new measure](#)
- [Creating and using custom fields](#)
- [Creating custom pod CSS styles](#)
- [Creating custom table CSS styles](#)
- [Creating and using a calculated field](#)
- [ClearPoint Data Loader Care Package](#)

# CHECKLIST

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- Update default layouts
- Update default series
- Custom field cleanup
- Pod and table styles customizations
- Calculated fields cleanup
- Data Loader audit

# CHAPTER 5: USER MANAGEMENT

Once you have dealt with tidying up your various system settings, you can now focus on the most valuable piece of the puzzle: your users!

Proper user management at your annual rollover will allow you to more effectively and efficiently manage who has access to what in your ClearPoint account, and reach out to those users who may not be getting as involved in the account as you would like.

## Add and Edit Users


It is also common at the start of your new fiscal year that different people may become responsible for different elements, and this is a great time to make those changes to their settings to make sure that all elements are accounted for and nothing in your strategic plan falls through the cracks.

If you neglect to assign the appropriate users to a new scorecard, for example, those users may not be able to view the elements they are responsible for, and parts of your strategic plan may subsequently be ignored or forgotten about.

Begin this process of effective user management at the annual rollover by adding in your new users. If there are new stakeholders at your organization who need access to your ClearPoint data, now is the time to add and train them!

## Consider Browsers

It's also important to note that depending on your contract with ClearPoint, you may be able to add in additional read-only users at no extra cost, regardless of the number of user licenses you have purchased for your organization. If you are not sure whether or not this is included in your contract, please reach out to us.



Adding in read-only users (or browsers, as we like to call them) is a great way to allow people in your organization who are not necessarily directly responsible for specific elements to still have the opportunity to view analysis and data relevant to your strategic plan, so that they have a good sense of how your organization is performing.

For basic browsers, we offer several ‘Getting Started’ resources in our Support Center to help these users get up to speed and learn their way around ClearPoint.

Finally, we encourage you to give these new users a profile photo to help other users in the account see who they are. This is not crucial, but it is a great way to eliminate any confusion and help people put a face to a name.

## **Assign Ownership**

Also be sure to assign the appropriate ownership to your already existing users, just as you should be doing with your newly added users. This will ensure that you have the appropriate people responsible for updating their elements each period, so that nothing is overlooked.

Remember that ownership should not be something that is changing from one period to the next, meaning that you will want to think seriously about how you want the overall ownership of all of your elements set up for the entire upcoming fiscal year.

## **Check Permissions**

In addition to ownership, we recommend that you address and change user permissions at the annual rollover.

Make sure that user permissions have been updated based on the new scorecards or reports that have been added to your account. It’s not a surprise to anyone that roles in organizations change, and turnover is happening constantly.

To account for this, make sure that your user permissions are changed accordingly in order to ensure that all of your users have access to what they need to.

One way to easily see who has access to what is by running a User Access Report, which can be done from within the 'Users and Groups' page in System Settings.

## Tidy Up Users And Groups

Now that you have addressed the permissions for new and existing users, tidy up your account by deleting the old users and user groups that no longer serve a purpose in ClearPoint.

For example, you may have several browsers listed in the account that are no longer working at your organization, or are not directly involved in the strategic planning process. Delete! Keeping them around serves no purpose, and will only clutter your account.

A great way to see who is active in your account is by running a User Activity Report. This is different from a User Access Report, in that a User Activity Report can actually show you who is logging in, and how frequently they are logging in.

This is a great tool to take advantage of as it allows you to recognize those users who have been especially active (think about rewarding these users in some way!), as well as recognizing who has not been as active in your ClearPoint account as you would like.

For these inactive users, we suggest that you schedule additional mini-trainings to get them up to speed, or find a different way to get them engaging with the tool again.

At ClearPoint, we greatly value employee visibility and engagement when it comes to strategy. By ensuring that each of your users are remaining active in the tool, you are one step closer to getting them invested in your organization's strategy, and this will ultimately help improve the success of your strategic plan as a whole.

## ClearPoint Support

- [Adding and editing user groups](#)
- [Explaining the types of users in ClearPoint](#)
- [Exporting user access and user activity reports](#)
- [ClearPoint Fundamentals](#)

# CHECKLIST

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- Add new users
- Update all permissions
- Assign ownership
- Run user activity report

# CHAPTER 6: REPORT TEMPLATES AND DOCUMENTS

Now it's time to address your report templates and documents, starting with your summary reports.

Cleaning up this area of your account and revising your existing templates to include updated information and periods from your upcoming fiscal year will help you to streamline your reporting process. After all, that's what ClearPoint is for!

## Summary Reports

Begin this process by cleaning out all of the summary reports you no longer need. Then, focus on your existing summary reports. If your reports included specific periods from the previous year, for example, now is the time to update them with the new year's periods!

ClearPoint also offers you the option to create reports with multiple periods of data. We encourage you to take advantage of this feature to demonstrate to your employees/stakeholders how your organization or specific departments have performed over time, to help you recognize trends and identify ways in which you might need to improve.

## Briefing Books and HTML Exports

Once your summary reports have been taken care of, move on to your Briefing Book templates. Again, delete the ones that you no longer need, and update your existing templates to include the necessary information or elements and reports from the upcoming fiscal year.



One example of a way to update these templates, would be to update the header and footer of your Briefing Book templates if they happen to contain year-specific information. For example, at our annual rollover, we might change our footer “Copyright 2020, ClearPoint Strategy”, to “Copyright 2021, ClearPoint Strategy”.

Delete and update your HTML reports templates as well, and involve your IT department if necessary to make the appropriate changes in these reports.

## Document Library

Finally, clean up and remove the clutter in your documents library. This includes Briefing Books, HTML reports, and attachments. Often, people are generating documents and reports simply to test things.

Clean up all of the clutter by deleting any documents that are no longer needed for your upcoming fiscal year, which typically is most of them! Cleaning up this area of your account will not only make it easier for your users to find what they are looking for and streamline your overall reporting process, but will help your account to run faster as well.

## Scheduling Reports

Once you finish cleaning out old reports and setting up new ones, you can schedule your reports to automatically generate each reporting period. For each Reporting Workflow, add the reports that you need, set the date and time you want the report to generate, and select the people you want to send the report to. Your entire team is armed with the information they need when they get to your strategy meeting.

## ClearPoint Support

- [Managing schedules](#)
- [Scheduling automatic report generation](#)

# CHECKLIST

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- Delete unused summary reports
- Add new reports
- Purge unused Briefing Book templates
- Add new Briefing Book templates
- Purge unused HTML reports
- Add new HTML reports
- Schedule reports

# CHAPTER 7: NOTIFICATIONS

You've made some good progress... but there's more! Time to focus on your notifications, one of ClearPoint's greatest 'secrets'. Well no, they are not technically a secret, but we find that users often forget about this feature.

Notifications are a valuable tool when set up correctly, as they help users create a habit of using ClearPoint as their one-stop shop for all your strategic information.

So, what's a notification? Notifications alert users that something happened in ClearPoint. You can set up notifications for lots of actions in ClearPoint, and they are customized for each user.

At the annual rollover, review notifications you have set up, remove any you no longer need, and add new ones for new elements, new users, and new processes.

At a minimum, we recommend setting up the following notifications for your users, to make sure they are never out of the loop and are always prepared for meetings.

- 1. Status alerts** – These notifications alert your users that the status of one of their elements changed. Usually, you want users to know when one of their elements falls behind plan so that they can create a plan for getting back on track.
- 2. Project alerts** – For projects, you want to make sure that users know before a project starts, when the due date is approaching, and if any of their tasks are falling behind.

- 3. Analysis alerts** – Hopefully, your users are providing great analysis for every one of the elements they are responsible for. If they are, it's probably too much for you to read every month. Set up alerts that look for keywords (like bad, below, and unfortunate) so that you can check in on these elements' status.
- 4. Ownership** – This is probably the most important notification. It alerts your users when you assign them to a new goal, measure or project.

Notifications help keep your users informed, and they save you time. You won't need to send an email every time you add a new element or want someone to know their project is behind. They'll be notified automatically.

## ClearPoint Support

- [Setting up new notifications](#)

# CHECKLIST

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- Remove old notifications
- Add notifications

# CHAPTER 8: COMMUNITY DASHBOARD

Finally, it's time to address the Community Dashboard. This is an optional step in the spring cleaning process, as not all organizations have built out a public facing dashboard. (Note: many for-profit organizations are also publishing to their intranet site from ClearPoint. If you are doing that, this section applies to you.)

If your organization is using our publishing feature, you will need to carefully evaluate your reports at the annual rollover and determine what changes you've made in your ClearPoint account are going to affect the appearance of your dashboard.

## Update Manager

First, make sure you have appointed someone to manage this process. There should be a go to person who is responsible for communicating either internally with the IT department or other members of your team responsible for making changes, or communicating with ClearPoint directly about the changes that need to be made to your dashboard at the rollover. Whether your dashboard updates are handled internally or handled by a member of the team at ClearPoint should be stated in your contract.

If you will be managing your dashboard internally at the annual rollover, we encourage you to take advantage of the widget guides that we offer, as these guides are personalized for your organization and map out how you should be updating your dashboard, step by step. Otherwise, reach out to ClearPoint Support, and we will make the appropriate updates for you.

## New ClearPoint IDs

A few other important things to keep in mind at the annual rollover: the first, is that every element in ClearPoint has a unique ID, which is what we use to display specific pieces of information from ClearPoint on the dashboard.

So, if you decide to duplicate year-specific scorecards as part of your rollover, your new measures will not have the same ID numbers as their old measures, and thus will not be automatically updated on the dashboard.

The new, year-specific measures would need to be manually added to the dashboard instead. One way to avoid this is to duplicate your scorecard at the year end and keep using your main scorecard. Let your new duplicate be the archived section for the year that has just ended.

Second, it's important to keep in mind that the period on the dashboard is separate from the period displayed in ClearPoint. You do not need to worry about data entered for a new period in ClearPoint appearing on the dashboard until you are ready to make that change from the WordPress side.

## Keep it Tidy

The dashboard is a great way to display your data with members of the public, and increase transparency, but if you do not make sure to tidy up your dashboard and make the appropriate updates at the annual rollover, then your data will not appear correctly.

We encourage you to reach out to us if you have questions at the rollover or are in need of your widget guides. We're here to help!

## ClearPoint Support

- [Updating your Community Dashboard](#)

# CHECKLIST

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- Appoint dashboard owner**
- Make dashboard updates (or work with ClearPoint to do so, depending on your contract)**



# CONCLUSION

Just like your kitchen or your closet, if you keep your account organized and updated, it will be a lot easier to take advantage of the elements you are trying to manage in ClearPoint.

ClearPoint can do a lot to help streamline your reporting process, but we hope this eBook has shown you the many ways in which you can take action yourself, and enhance this process even more.

While it may take some time, we guarantee that committing to managing and tidying up your ClearPoint account on an annual basis will be worthwhile in the long run. It will make your life easier, make your users lives easier, increase efficiency across your organization or department, and ultimately will help to enhance your strategy as a whole.

And, as always, we are always here and happy to help! We'd love to get feedback on how you are doing your annual spring cleaning of ClearPoint, and encourage you to reach out to us at any time with questions or comments by emailing [support@clearpointstrategy.com](mailto:support@clearpointstrategy.com).

We highly value your feedback, and want to continue to act as your partner as you work to enhance your performance management processes. Thank you for choosing ClearPoint, and best of luck on your strategy execution journey!