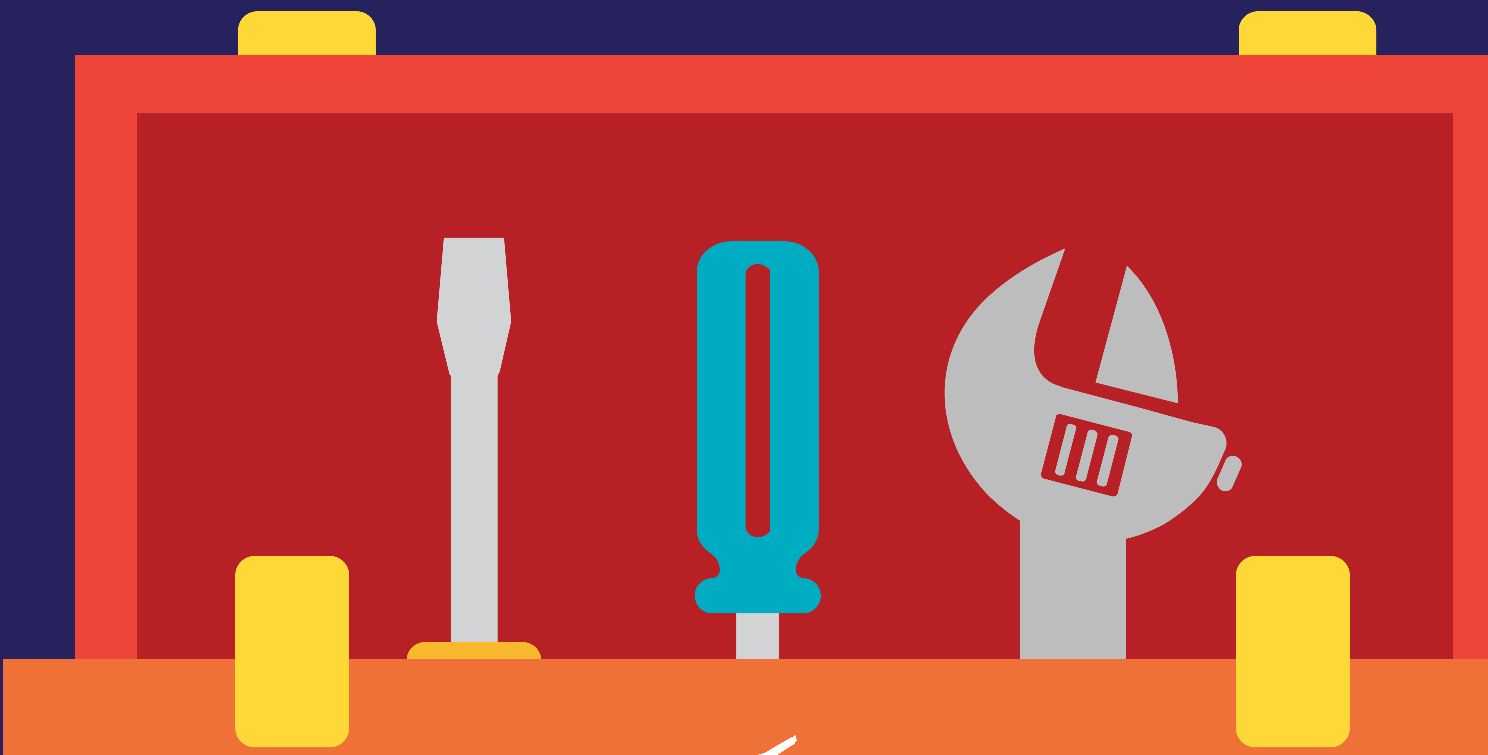
GETTING STARTED

with ClearPoint Strategy



ClearPoint Strategy

Getting up and running with ClearPoint
in less than an hour

Getting Started with ClearPoint Strategy

Greetings! Welcome to ClearPoint Strategy! For many of you out there, this is your first time using ClearPoint. Have no fear, this guide will get you up and running in no time and on your way to achieving the status of **Reporting Superhero!**

Table of Contents

Still have questions? Check out our Support Center. In it you will find over 200 help articles and videos. We also have an extensive collection of webinars that dive deep into the functionality of ClearPoint.

STILL have questions? Feel free to email our support team, at support@clearpointstrategy.com. We will gladly answer any questions you have!

Logging in to ClearPoint

First things first…

When ready, click this link to begin exploring ClearPoint:

https://app.clearpointstrategy.com/login/

You might want to add this to your favorites

1. Enter the credentials you received in the ClearPoint "Welcome Email" and click Login.
2. If you need a reminder, click the "Reset Password" button and enter your email address. A link to reset your password will be emailed to you.

Note: First time visitors will be asked to replace the system generated password with something unique. It must contain six letters including one number.

Navigating ClearPoint

Endorsed by Lewis AND Clark

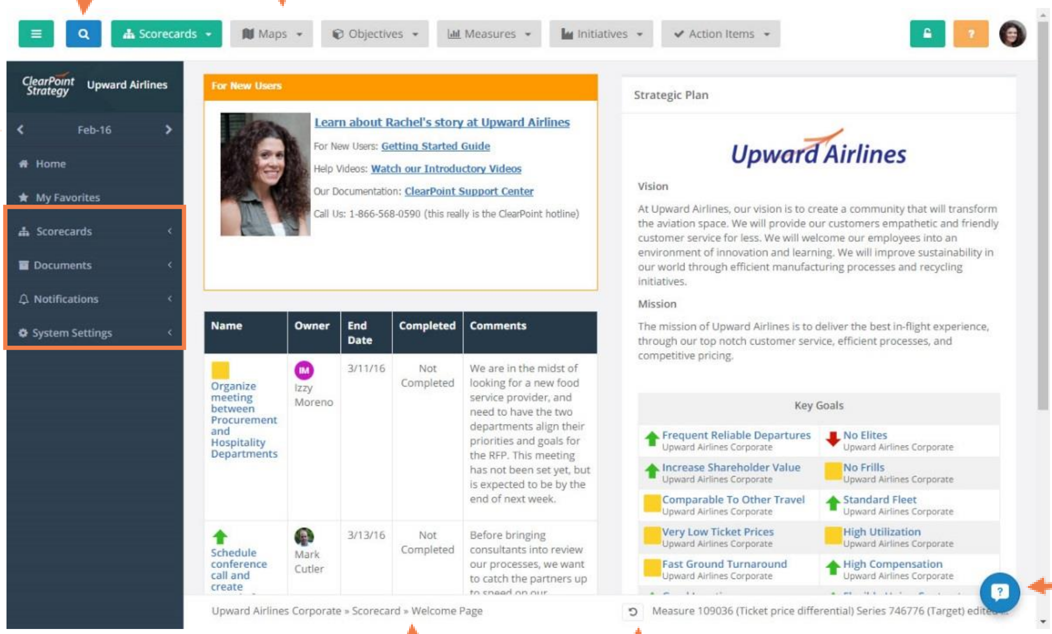
ClearPoint is super easy to navigate. Users can choose to view everything they own, specific summary reports, or even time travel from one reporting period to another.

Search for anything in ClearPoint

Select **Scorecards, Maps, Objectives, Measures, Initiatives, etc.**

Edit your **Profile**, track your **Notifications**, and **Logout**

Select your **Reporting Period**



Navigate to **Scorecards**, create and manage **Documents**, set up **Notifications**, and manage **System Settings**

Use the **Breadcrumb** to quickly see where you are in ClearPoint.

Undo your last change

In-app messaging for live support

Start with this quick video to learn the basics

ClearPoint Strategy

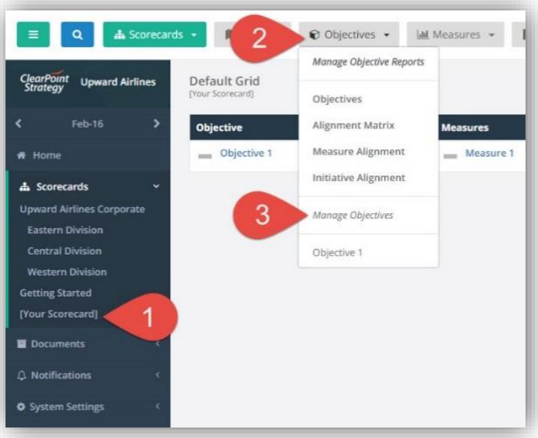
Adding Objectives (or measures, initiatives, and action items)

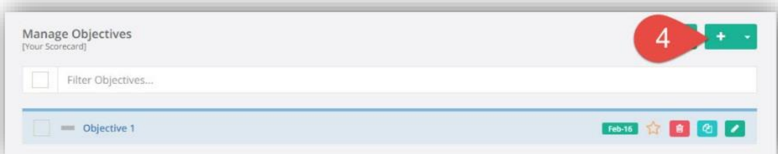
It's good to have goals

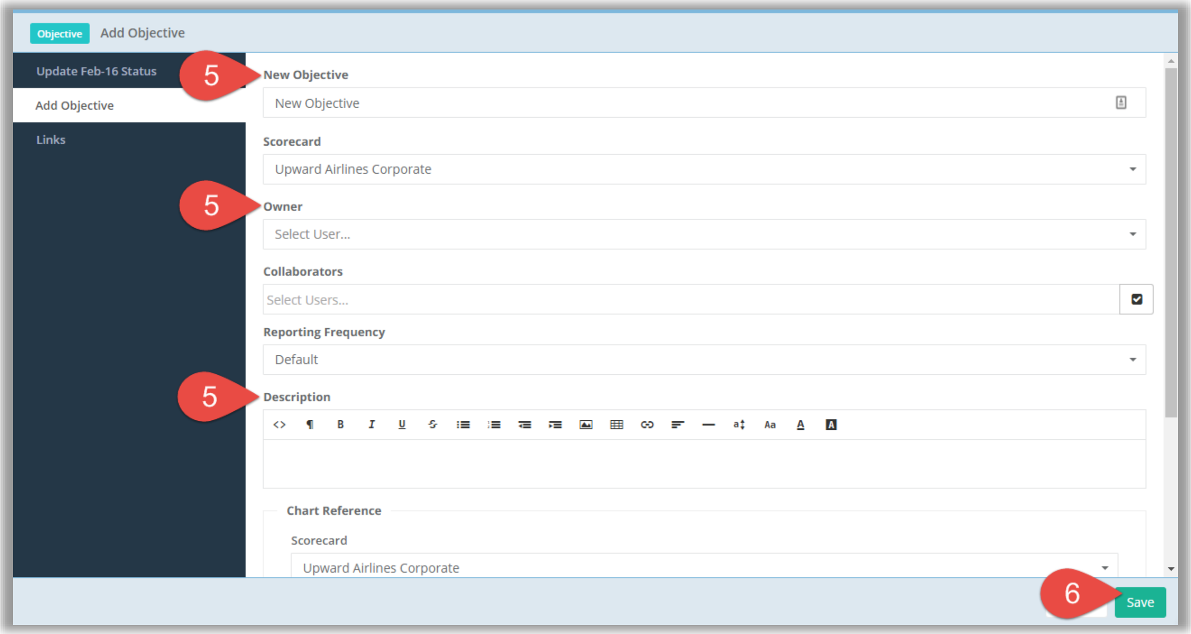
Users can start building out the content for their account. The most basic building blocks are called "elements." Let's begin by adding the first element, objectives!

Watch this video

1. Begin by clicking on [Your scorecard]. This might already be changed to the name of your organization.
2. Click on Objectives.
3. Select the 'Manage Objectives' menu.
4. From the 'Manage Objectives' page, select the add button.
5. Give your objective a name and fill in appropriate details. You don't have to fill everything in right now; you can come back later.
6. Hit save and you are done. Congratulations, you now have a new objective!
7. Repeat these steps to add your measures and initiatives too.







Note: This works the same for adding measures, initiatives, action items, and risks

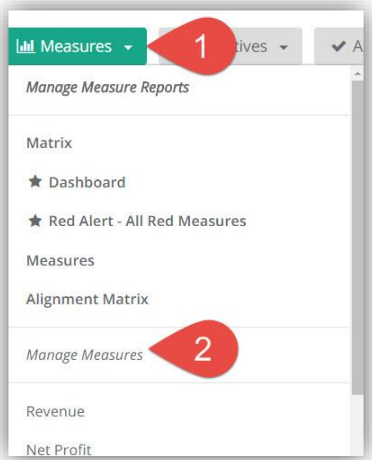
ClearPoint Strategy

Editing Measures (or objectives, initiatives, and action items)

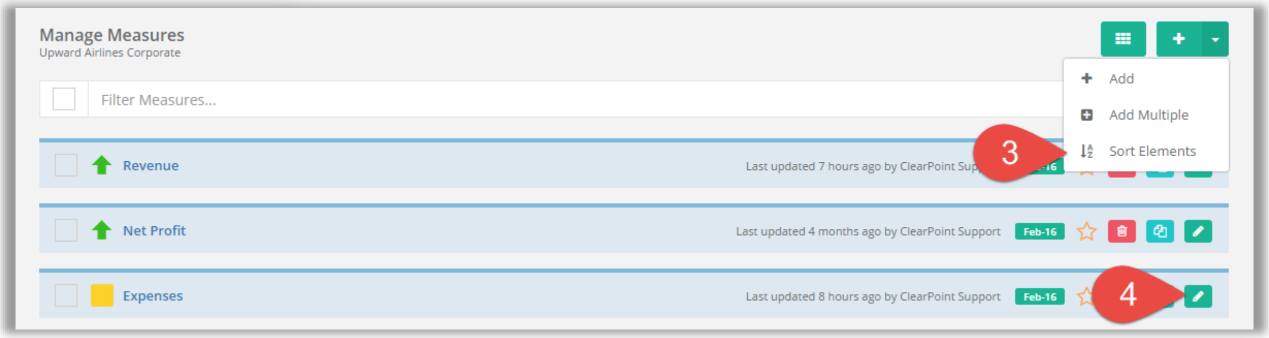
Let's create order out of a bunch of elements

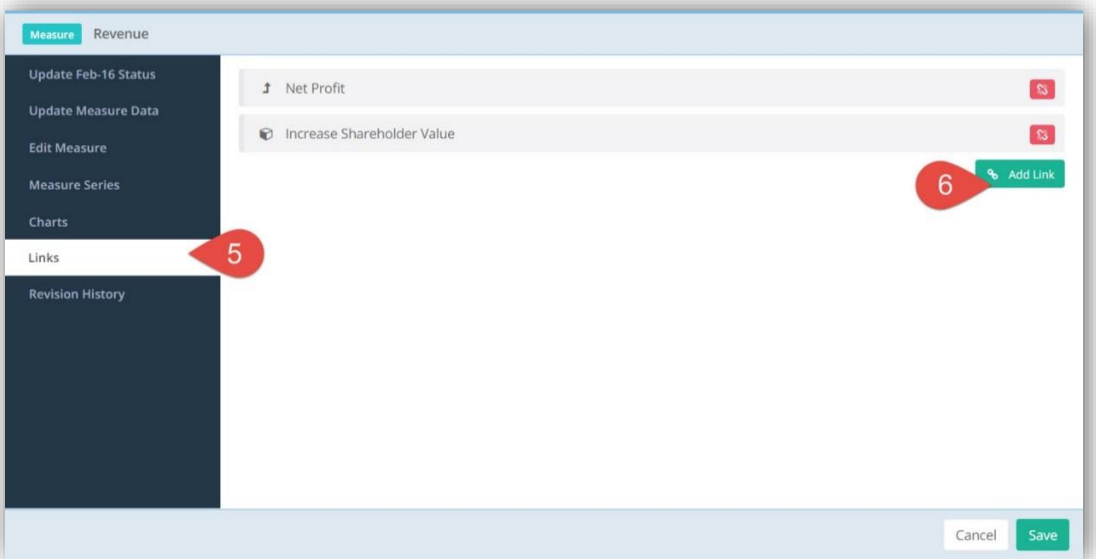
Once you have added your elements (objectives, measures, initiatives) in ClearPoint, you may wan to order them, link them to each other, or edit their details. Learn how, here.

Check out this video



1. Click on 'Measures' in the top navigation.
2. Select the 'Manage Measures' menu.
3. From the Manage page, you can drag and drop the order of the measures.
4. Select the edit button next to any measure to edit the details.
5. On an edit page, you can fill in the details. One detail is to select links.
6. And link your measure to objectives or other elements.





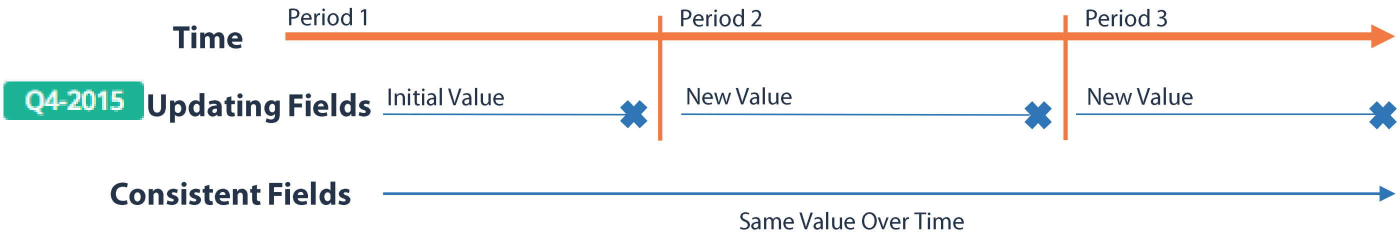
ClearPoint Strategy

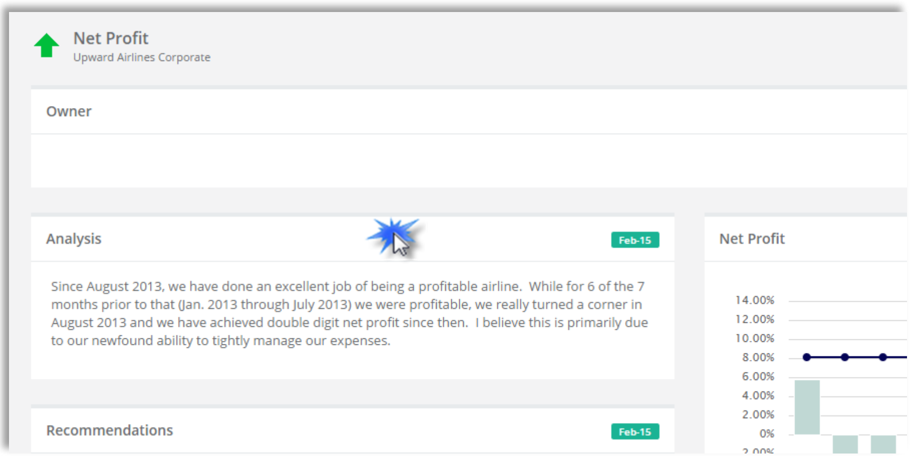
Updating information

Continuity vs. Change

Making Updates in ClearPoint

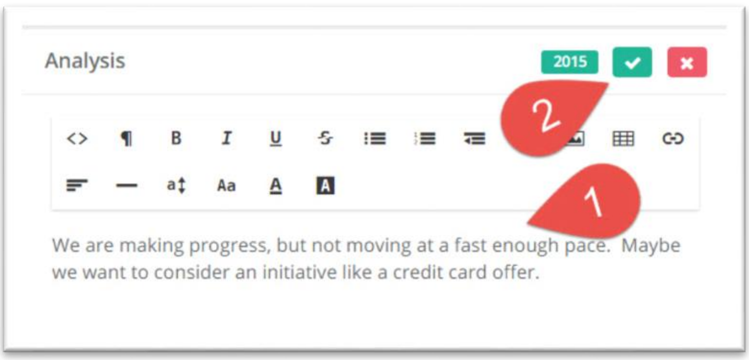
In ClearPoint, there are different types of fields. Some are **consistent** through time and include things like measure names as well as owners. Other fields **change** over time and include things like Analysis, Recommendations, and even data. Fields that change typically have a date next to them, so you know what period you are updating.





To make edits or updates, just go to the page you want and double click on the element you want to edit.

1. Make any edits you want, including formatting.
2. Don't forget to hit save (or cancel).

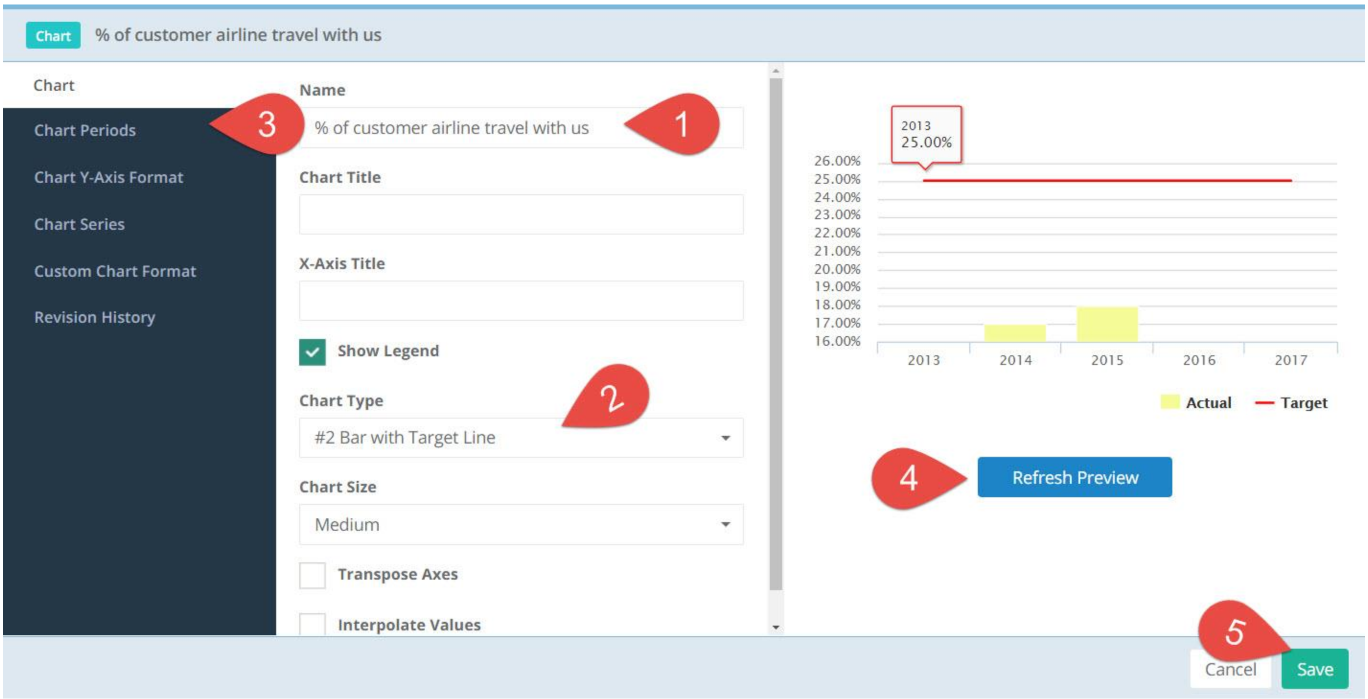


Updating your charts

Choosing the right chart helps your data tell the right story

We've taken the frustration out of creating charts. Just double-click on a chart from a measure detail page, and you will be taken to our chart editor.

See what's possible with charting here



1. Change the name of your chart (helpful especially if you have more than one chart per measure).
2. Choose the basic chart type. ClearPoint has 10 default charts.
3. Edit all aspects of the chart from report frequency to details on each chart series. Just click down each element on the left navigation.
4. You can preview each change as you go, and
5. Don't forget to save when you have just the chart you are looking for.

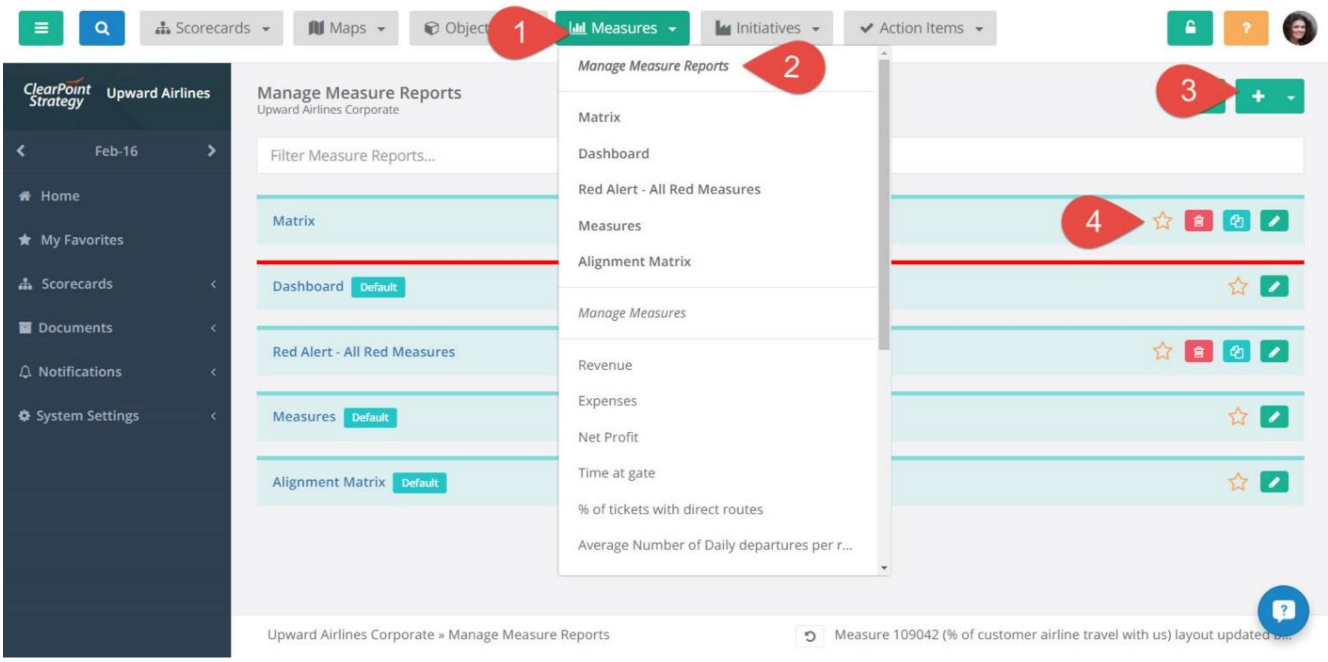
Manage your summary reports

Create reports that are centered around each of the elements in your scorecard

Learn how layouts work here

Manage your reports

1. Select the element name at the top of the screen.
2. Select Manage Reports.
3. You can add a new report.
4. Select the star to favorite a report, or delete, copy or edit the report.



Creating summary reports

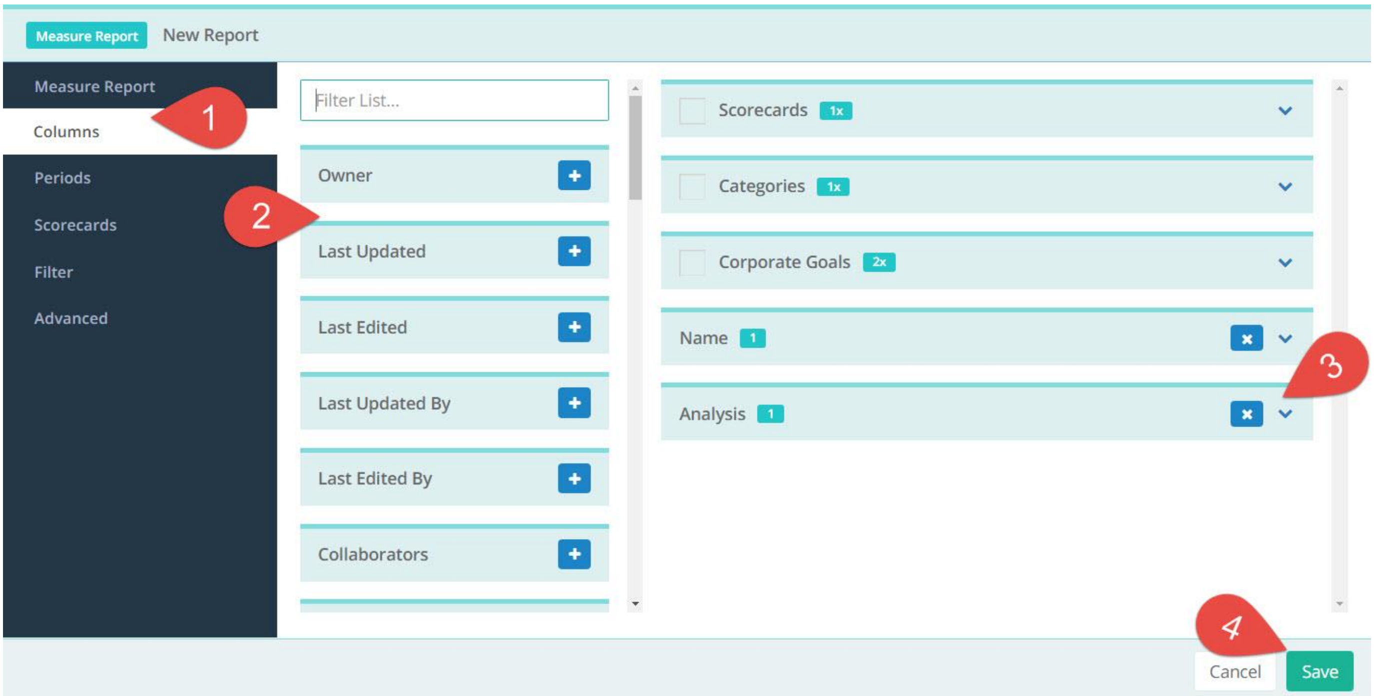
Create reports that are centered around each of the elements in your scorecard

Learn how layouts work here

Creating and customizing your reports

When you edit a summary report or create a new one, it takes you to a dialog box like the one below.

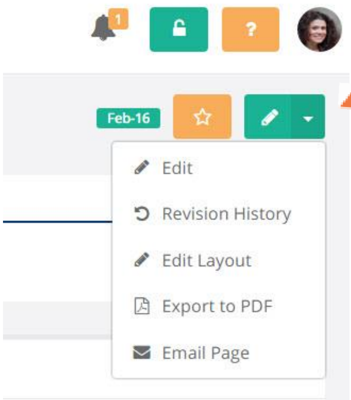
1. You have many options for customizing this report in the control panel on the left side. Be sure to select the Columns section.
2. You can drag and drop fields from the left to the right section to create the columns in your report.
3. Select the carrot on the far right of each column to change the name and width of the column.
4. Be sure to hit save when you are finished and your new report will show up immediately in your navigation.



PDFs and Briefing Books

The ultimate deliverable

Learn how it works

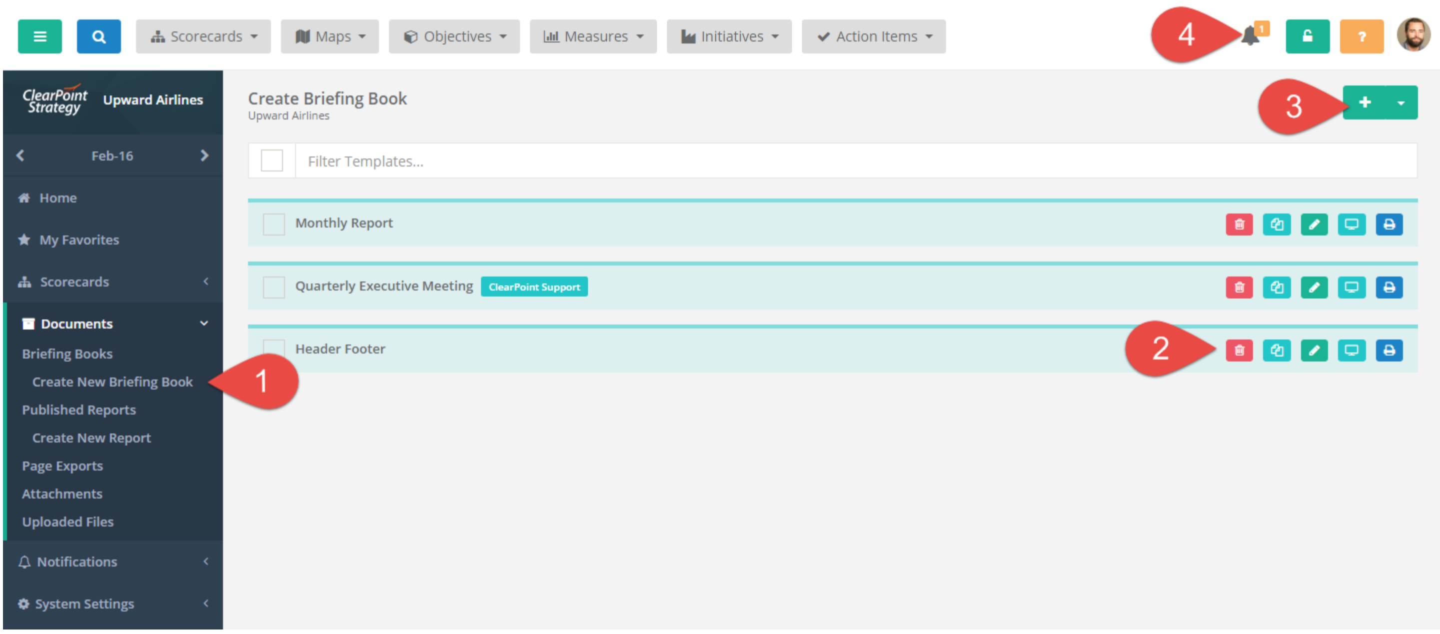


Export Single Page Reports

Click on the right side of the edit button to get the option to **export to PDF** or email the page. Get **notified** when your document is ready.

Printing Multi-Page Reports and Briefing Books

1. Select "Create Briefing Book" from the Document section of the control panel.
2. For each of your templates, you can delete, copy, edit, or generate the report.
3. You can also use the + sign to create a new report. A dialog box will open and walk you through the steps.
4. Be sure to check your email and the notification bell when your document has been generated.



Being an Administrator

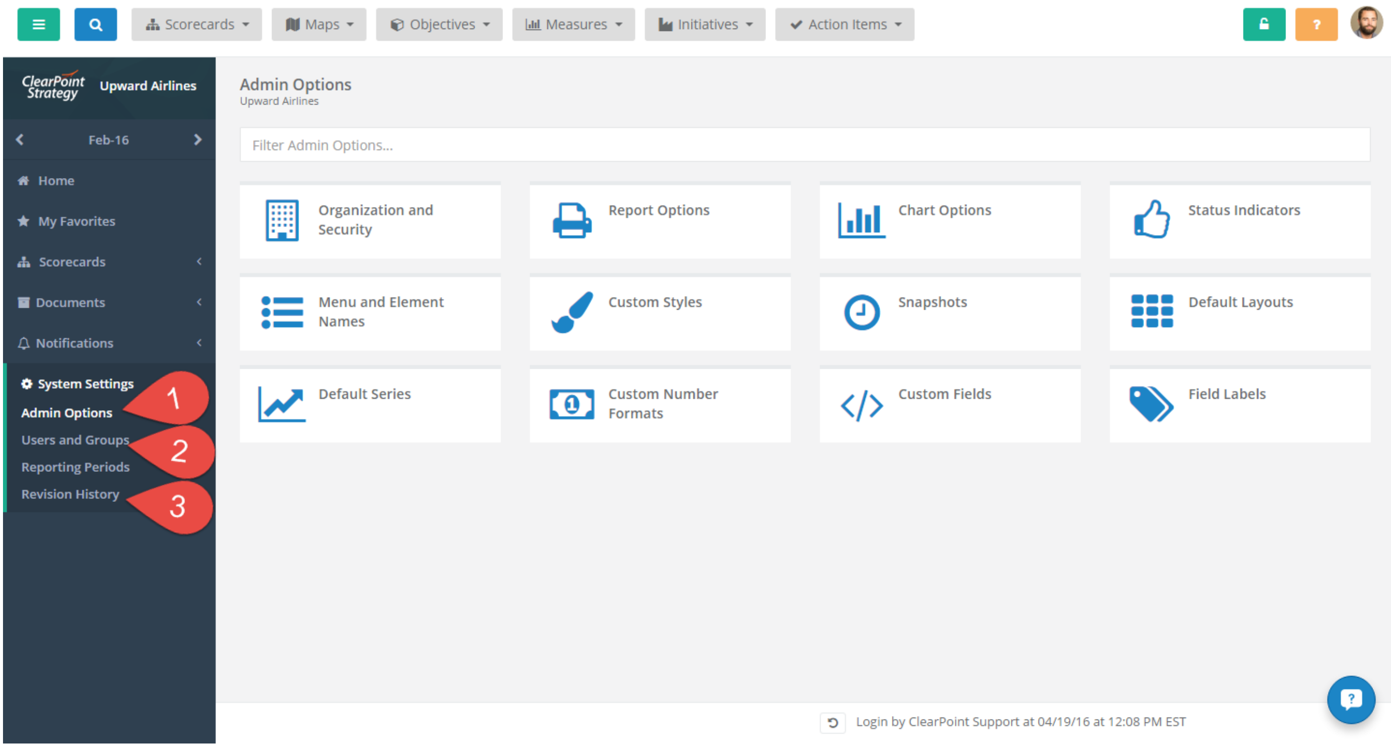
a.k.a system configuration

Learn about these cool features here

Ground Control to Major Tom

Only administrators have access to "System Settings" in the lower left of the control panel.

1. Admin options is where you would do most of your "one-time" customizations of ClearPoint. Your options can be seen in the main panel of the screen shot below.
2. Other notable system settings include the ability to add scorecard and manage your users.
3. Don't forget, you also have the revision history log to track all changes in ClearPoint: who made them and when. If you don't like the changes, administrators can undo them.



And that's Getting Started!

Hopefully, you followed along and built out the content for your very own ClearPoint account. If you didn't, no problem. Just go back to the beginning and check these small tasks off your checklist. Any information you put into ClearPoint will be saved, even after your free trial expires.

If you haven't already discovered it, our Support Center is loaded with valuable resources to help you get started. It also covers much more advanced topics if you want to take your account setup to the next level

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Additionally, our support line is always open. The best way to reach us is support@clearpointstrategy.com. Our response time was once referred to as the four-minute mile in software supporting standards, so don't be shy to reach out!

Happy reporting!