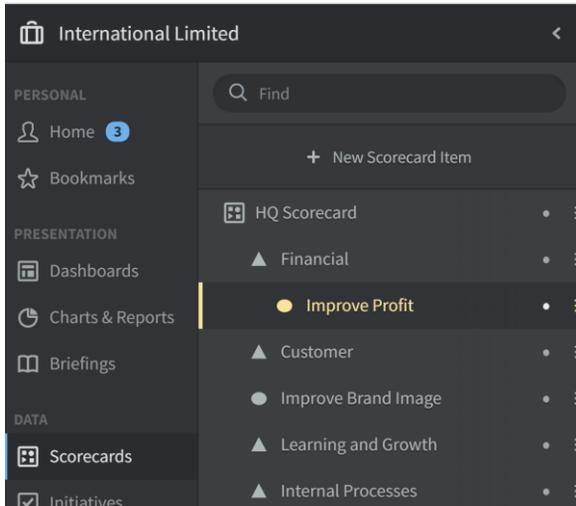




Adding KPIs - 1

KPIs can appear under a Scorecard, Perspective, Objective or Theme

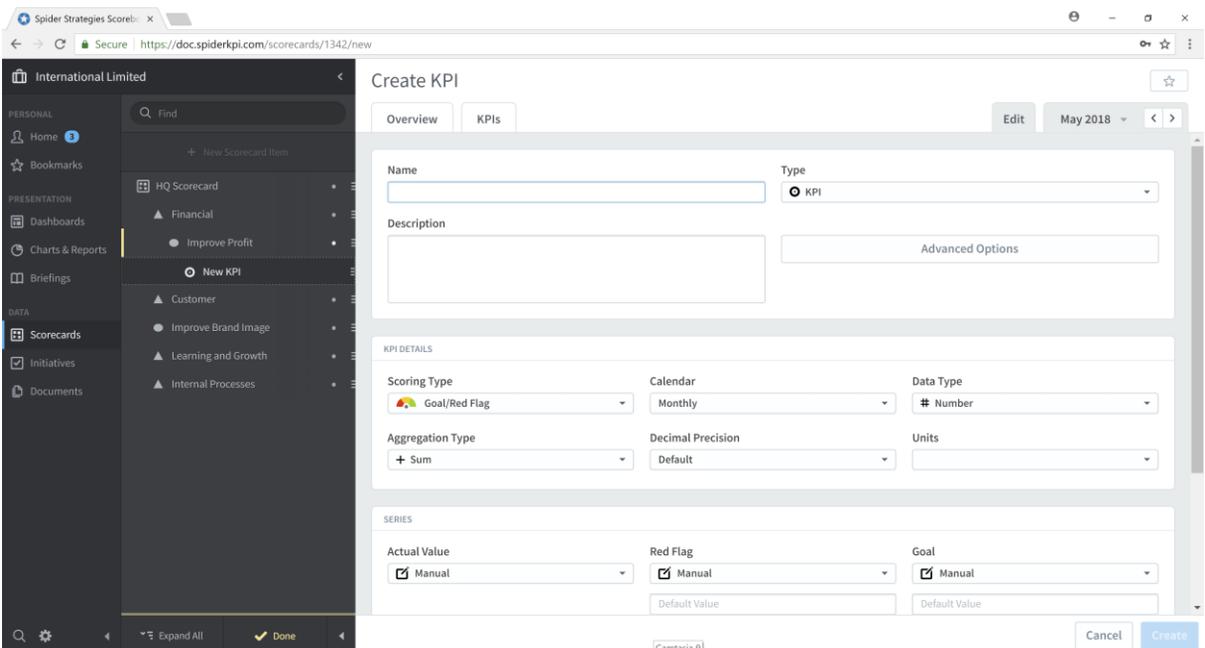
KPIs are the 'engine' of the scorecard. When you provide actual values for KPIs, a normalized score is generated and that score gets rolled up the scorecard hierarchy to 'color-up' any portion of the scorecard that KPI impacts..



Click on the scorecard item under which you want the KPI to appear.

In our example we have highlighted the **Improve Profit** objective and we will be adding the KPI of **Profit**.

Click on the **+ New Scorecard Item** button at the top of the black Scorecard navigation pane to open the Create KPI dialogue on the right together with a New KPI under the Improve Profit Objective:





Adding KPIs - 2

You do not have to provide all of the details at this stage, but there are a few things you need to add, following this sequence:

The screenshot shows the 'Create KPI' form with the following fields and callouts:

- 1**: Name input field
- 2**: Type dropdown menu (set to KPI)
- 3**: Description text area
- 4**: Scoring Type dropdown menu (set to Goal/Red Flag)
- 5**: Calendar dropdown menu (set to Monthly)
- 6**: Data Type dropdown menu (set to # Number)
- 7**: Aggregation Type dropdown menu (set to + Sum)
- 8**: Red Flag dropdown menu (set to Manual)
- 9**: Goal dropdown menu (set to Manual)
- 10**: Add Owner... button
- 11**: Add Updater... button

Buttons at the bottom right: Cancel, Create

1. Give the KPI a name
2. Confirm the Type, which should be KPI
3. Provide a description - this is optional but it is good practice to provide a description which includes where the KPI data comes from.
4. Select the Scoring Type - the scoring type can be one of eleven different types. On most occasions you will use Goal/Red Flag (Red/Yellow/Green)
5. Select the Calendar - this relates to the frequency the data is collected, normally monthly for general management reporting.



Adding KPIs - 3

6. Select the Data Type - Scoreboard can handle Currency, Percentage, Numeric and Yes/No data
7. Select the Aggregation Type - this tells Scoreboard what to do with actual values when aggregating them at a calendar level other than the frequency previously defined in the Calendar setting.

For example, for a **Currency** KPI, the aggregation type is normally **Sum**. When looking at this KPI at a yearly level, you want Scoreboard to sum the months to provide a year total.

For a **Percentage** KPI, the aggregation type is normally **Average**. When looking at monthly data at a yearly level, you want QuickScore to calculate an average over all the months.

Thresholds: You need to tell Scoreboard when you expect a KPI to turn red (from yellow) and green (from yellow)

8. Provide the Red Flag threshold. For example, if the KPI is deemed to be in the Red below \$25,000, the the Red Flag value is \$25,000
9. Provide the Goal threshold, this is usually the performance target
10. Define/select the Owner of the KPI
11. Define/select the Updater of the KPI

Very Important:

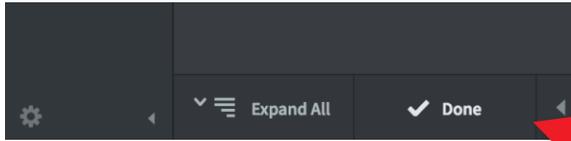
- **When you have selected and entered all of the settings for a KPI, click the blue Create button in the lower right corner**

After completing the creation of a KPI, you will be given the opportunity to add another KPI and a blank Create KPI screen will appear. Add as many KPIs as you need.



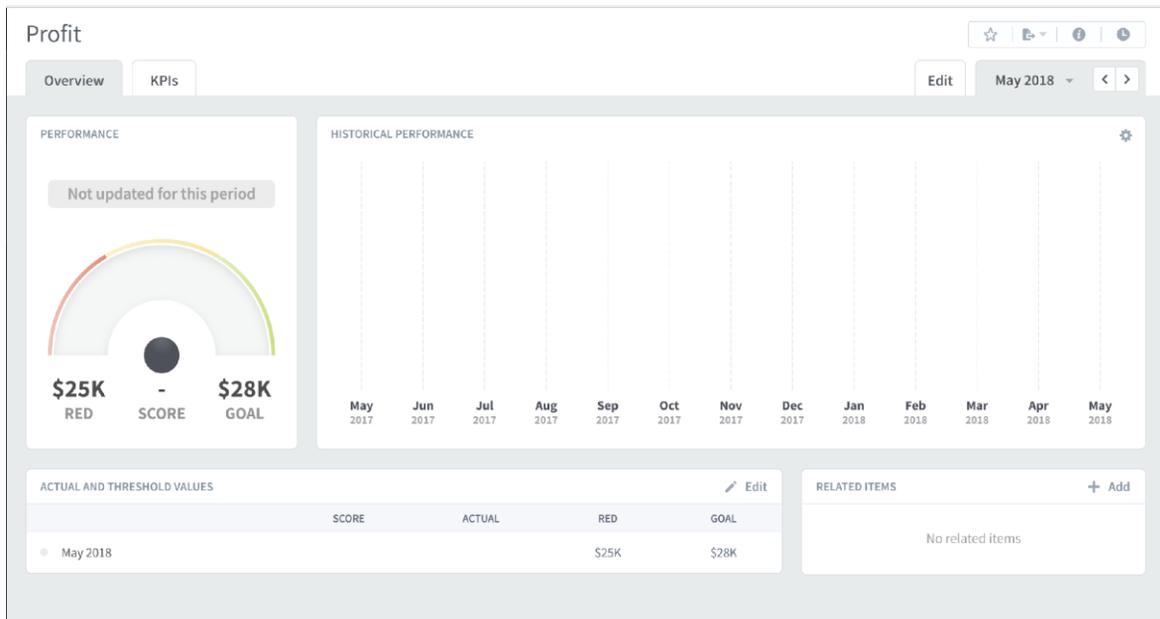
Adding KPIs - 4

Once you have added all of your KPIs, you can come out of Edit mode



When you have finished defining your KPIs, click **Done** at the bottom of the menu list

The resulting KPI should look something like this:



You can see in this example the KPI is called Profit and the thresholds have been set at \$25K for red and \$28K for green.

You can add more KPIs by going back to the beginning and repeating the process.

The next step is to add some Actual Values to the KPIs



KPIs Details - Cheatsheet

These parameters appear in the **KPI Details** and **Series** panels:

- **Scoring Type:** usually Goal/Red Flag, select from the list
- **Calendar:** Monthly, Quarterly, Yearly, Weekly or user defined
- **Data Type:** select from one of the three options:
 - *Number* - numerical data, e.g. number of calls received
 - *Percentage* - any percentage value, e.g. %Net Profit
 - *Currency* - a number expressed in currency e.g. USD or GBP
- **Aggregation Type:** How to aggregate values at a different calendar level
 - *Sum* - data added monthly will be summed up when viewed quarterly or yearly e.g. Revenue is usually defined as Sum
 - *Average* - data that is added monthly will be averaged when viewed quarterly or yearly - e.g. %Net Profit is usually averaged
 - *Last Value* - the last value added will be used when viewed quarterly or yearly - e.g. Year to Date Sales is usually set to Last Value
- **Decimal Precision:** The default can be set in Administration
 - If you require anything other than the default, the decimal precision can be set here with a numerical value e.g. 0, 1, 2 etc.
- **Actual Value:** Manual or Calculated
 - It is possible to use a calculation, this is covered in advanced functions
- **Red Flag and Goal:** When KPIs turns Red, Yellow or Green
 - Scoreboard bases all of its calculations on this setting. You need to determine when a performance KPI is good, indifferent or bad, that is; Green, Yellow or Red. For the Goal/Red Flag scoring type, this requires two values:
 - *Red Flag:* when the performance KPI turns Red
 - *Goal:* when the performance KPI turns Green