KPIs (in Scoreboard) or Measures (in QuickScore) can be added at any level in a scorecard. KPIs/Measures are the ‘engine’ of the scorecard. When you add actual values to KPIs/Measures, a score is generated and the whole scorecard will ‘colour-up’. To add KPIs/Measures you need to be an Administrator.

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

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

Click on the **New Scorecard Item** button and the Create KPI/Measure dialogue will appear together with a New KPI/Measure under the Objective:
You do not have to provide all of the details at this stage, but there are a few things you will need to add (the example below is from QuickScore).

Follow this sequence:

1. Give the KPI/Measure a name - this should be a label 3-5 words long.
2. Select the Type - this should be KPI for Scoreboard, Measure for QuickScore.
3. Provide a description - this is optional but it is good practice to provide a description which includes where the KPI/Measure data can be found.
4. Select the Scoring Type - the scoring type can be one of eleven types. On most occasions this will be Goal/Red Flag (Red/Amber/Green).
5. Select the Calendar - this relates to the frequency the data is collected, normally monthly for general management reporting.
6. Select the Data Type - the application can handle Currency, Percentage, Numeric and Yes/No data.

7. Select the Aggregation Type - this tells the application what to do with actual values when looking at them using a calendar other than the frequency collected calendar previously selected.

For example, for a **Currency** the aggregation type is normally **Sum**. When looking at monthly data with a yearly calendar, you want the application to sum the months.

For a **Percentage** the aggregation type is normally **Average**. When looking at monthly data using a yearly calendar, you want the application to take an average over the months.

**Thresholds:** You need to tell the application when you expect a KPI/Measure to turn red (from amber) and green (from amber):

8. Add the Red Flag threshold. For example, if the KPI/Measure is deemed to be Red below $25,000, the the Red Flag value is $25,000.

9. Add the Green Flag threshold, this is usually the target.

10. Optionally add the Owner (this can be done later).

11. Optionally add the Updater (this can be done later).

**Very Important:**

- **When you have entered all of the data click the blue Create button**

You will be given the opportunity to add another KPI/Measure, a blank Create KPI/Measure screen will appear. Add as many KPIs/Measures as you need.
Once you have added all of your KPIs/Measures, you can come out of Edit mode.

When you have finished, click **Done** at the bottom of the menu list.

The resulting KPI/Measure should look something like this:

You can see in this example the KPI/Measure is called Profit and the thresholds have been set a $25k for red and $28k for green.

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

The next step is to add some Actual Values - Go to the Adding Actual Values user guide
These parameters appear in the **KPI/Measure Details** and **Series** panels:

- **Scoring Type**: usually Goal/Red Flag, select from the list
- **Calendar**: Monthly, Quarterly, Yearly or user defined
- **Data Type**: select from one of the three options:
  - *Number* - numerical data, e.g. number of call received
  - *Percentage* - any percentage value, e.g. %Net Profit
  - *Currency* - a number expressed in currency e.g. USD or GPB
- **Aggregation Type**: How to aggregate for a different calendar view
  - *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. Cumulative 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 measures turns Red, Amber or Green
  - The application bases all of its calculations on this setting. You need to determine when a performance measure is good, indifferent or bad, that is; Green, Amber or Red. For the Goal Red Flag measure this requires two values:
    - *Red Flag*: when the performance measure turns Red
    - *Goal*: when the performance measure turns Green