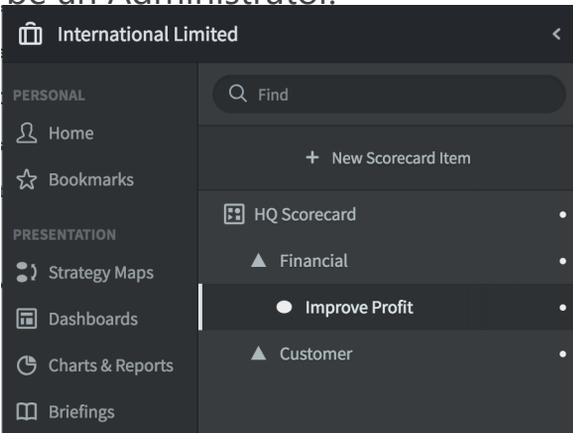




Creating KPIs/Measures - 1

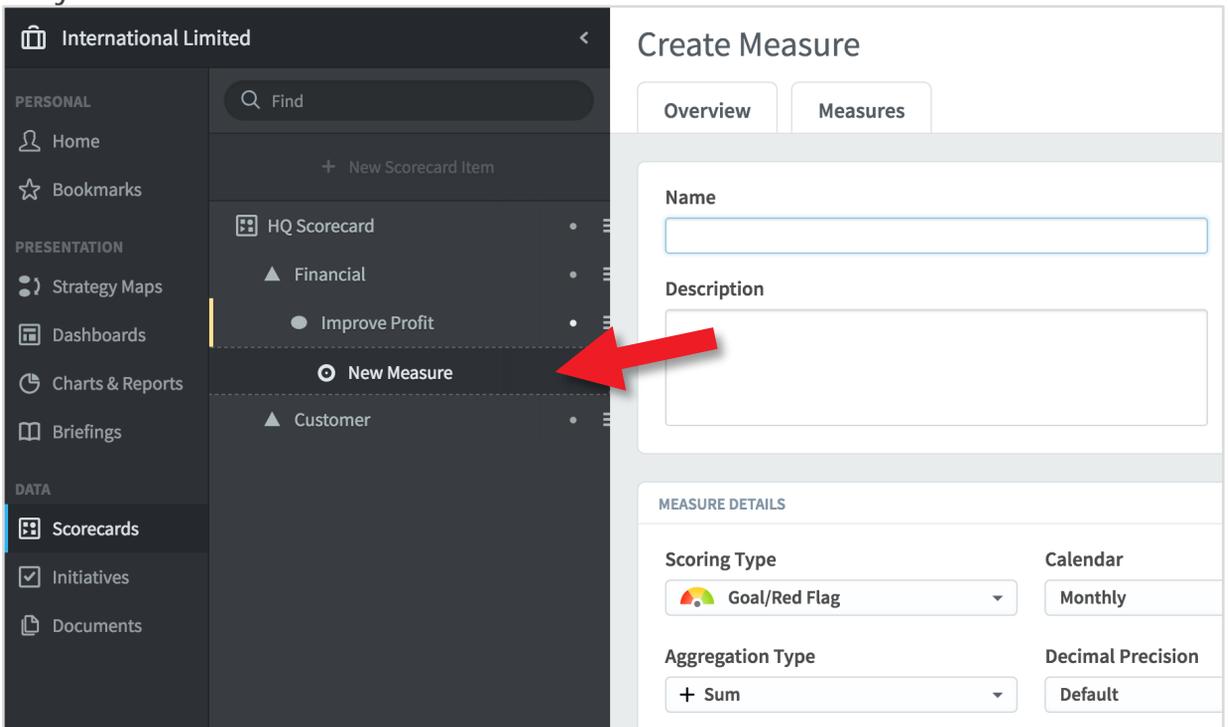
KPIs (in Scoreboard) or Measures (in QuickScore) can be added at any level in a scorecard. KPIs/Measures are the 'engine' of the scorecard. When you add actual values to KPIs/Measures, a score is generated and the whole scorecard will 'colour-up'. To add KPIs/Measures you need to be an Administrator.



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:





Creating KPIs/Measures - 2

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).

The screenshot shows the 'Create Measure' interface. It has tabs for 'Overview' and 'Measures'. The 'Overview' tab is active. There are 'Edit' and 'April 2018' buttons. The form fields are:

- Name** (1): Text input field.
- Type** (2): Dropdown menu with 'Measure' selected.
- Description** (3): Text input field.
- MEASURE DETAILS**:
 - Scoring Type** (4): Dropdown menu with 'Goal/Red Flag' selected.
 - Calendar** (5): Dropdown menu with 'Monthly' selected.
 - Data Type** (6): Dropdown menu with '# Number' selected.
 - Aggregation Type** (7): Dropdown menu with '+ Sum' selected.
 - Decimal Precision**: Dropdown menu with 'Default' selected.
- SERIES**:
 - Actual Value**: Dropdown menu with 'Manual' selected.
 - Red Flag** (8): Dropdown menu with 'Manual' selected.
 - Goal** (9): Dropdown menu with 'Manual' selected.
 - Default Value: Text input field.
- OWNERS**: 'Add Owner...' button.
- UPDATERS**: 'Add Updater...' button.

At the bottom right, there are 'Cancel' and 'Create' buttons.

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.



Creating KPIs/Measures - 3

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:

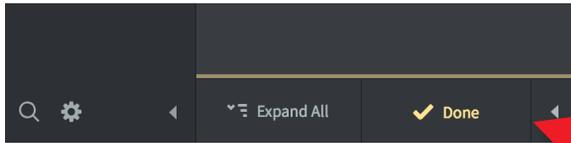
- **When you have entered all of the data click the blue Create button**

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.



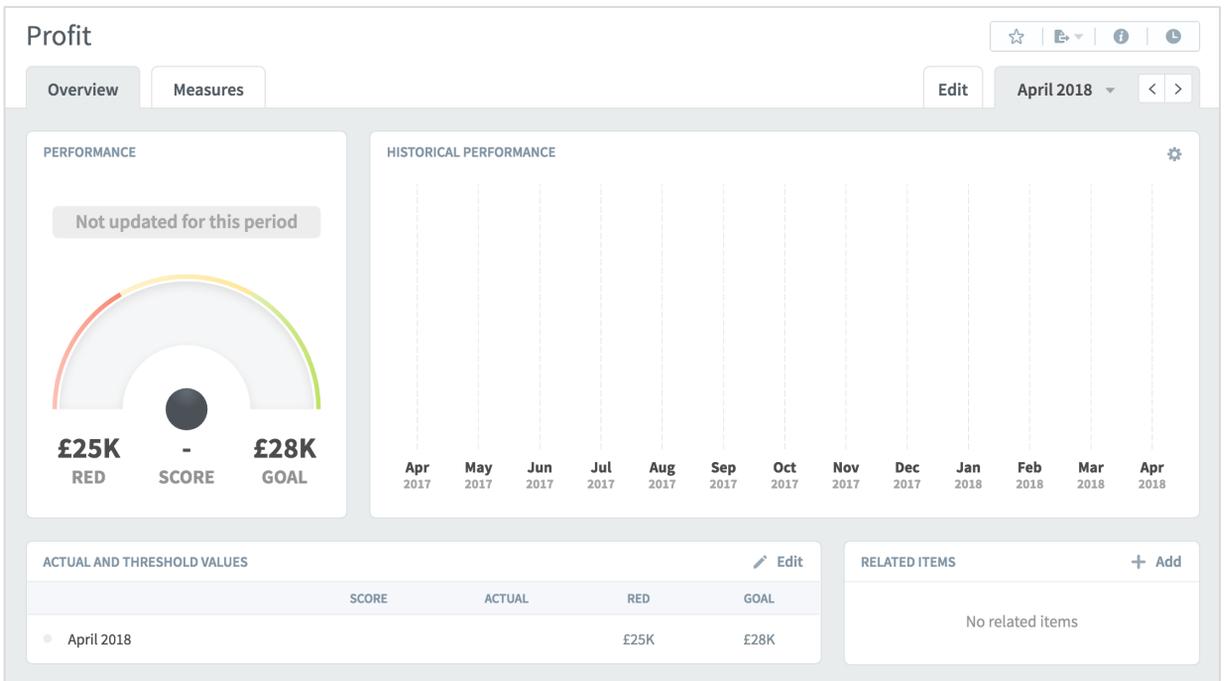
Creating KPIs/Measures - 4

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



KPI/Measure Details

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 GBP
- **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