KPI/Measure Definitions

When creating KPIs (Scoreboard) or Measures (QuickScore) the following information needs to be provided:

1. **Name** - this should be a label 3-5 words long.

2. **Type** - this should be KPI for Scoreboard, Measure for QuickScore.

3. **Description** - this is optional but it is good practice to provide a description which includes where the KPI/Measure data can be found.

4. **Scoring Type** - the scoring type can be one of eleven types. On most occasions this will be Goal/Red Flag (Red/Amber/Green).

5. **Calendar** - this relates to the frequency the data is collected, normally monthly for general management reporting.
6. **Data Type** - the application can handle Currency, Percentage, Numeric and Yes/No data.

7. **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. **Red Flag** - For example, if the KPI/Measure is deemed to be Red below $25,000, the the Red Flag value is $25,000.

9. **Goal** - this is the Green Flag threshold, this is usually the target.

10. **Owner** - Optionally add the Owner (this can be done later). The person who owns this object.

11. **Updater** - Optionally add the Updater (this can be done later). The person who updates the KPI/Measure with actual values.

**Very Important:**

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