



KPI/Measure Definitions

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

The screenshot shows the 'Create Measure' interface. At the top, there are tabs for 'Overview' and 'Measures', and buttons for 'Edit' and a date selector 'April 2018'. The form is divided into several sections:

- Name:** A text input field with a red circle '1' next to it.
- Type:** A dropdown menu with 'Measure' selected and a red circle '2' next to it.
- Description:** A large text area with a red circle '3' next to it.
- MEASURE DETAILS:**
 - Scoring Type:** A dropdown menu with 'Goal/Red Flag' selected and a red circle '4' next to it.
 - Calendar:** A dropdown menu with 'Monthly' selected and a red circle '5' next to it.
 - Data Type:** A dropdown menu with '# Number' selected and a red circle '6' next to it.
 - Aggregation Type:** A dropdown menu with '+ Sum' selected and a red circle '7' next to it.
 - Decimal Precision:** A dropdown menu with 'Default' selected.
- SERIES:**
 - Actual Value:** A dropdown menu with 'Manual' selected.
 - Red Flag:** A dropdown menu with 'Manual' selected and a red circle '8' next to it.
 - Goal:** A dropdown menu with 'Manual' selected and a red circle '9' next to it.
- OWNERS:** A section with 'Add Owner...' text.
- UPDATERS:** A section with 'Add Updater...' text.

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

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.



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- 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**