Time KPI Report

Create Report

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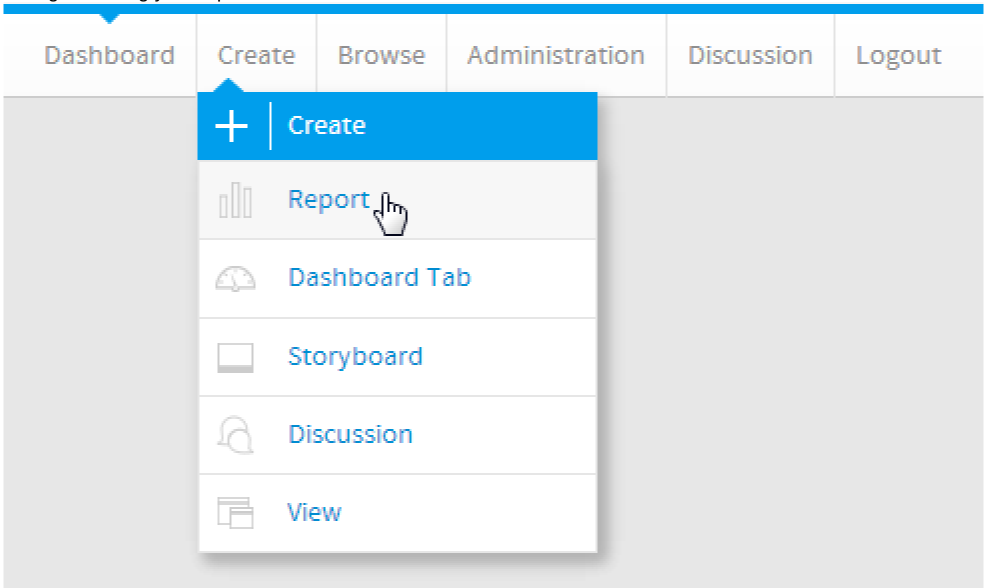
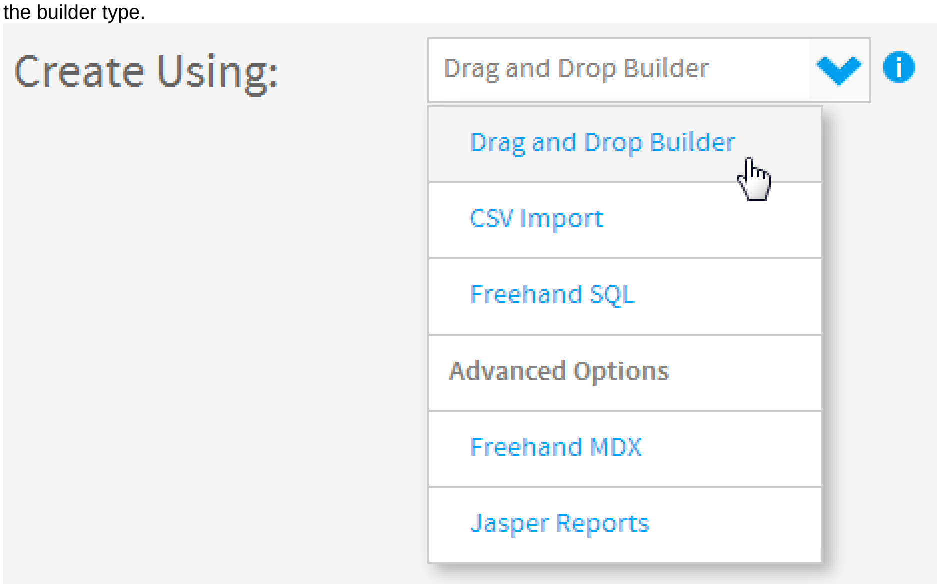
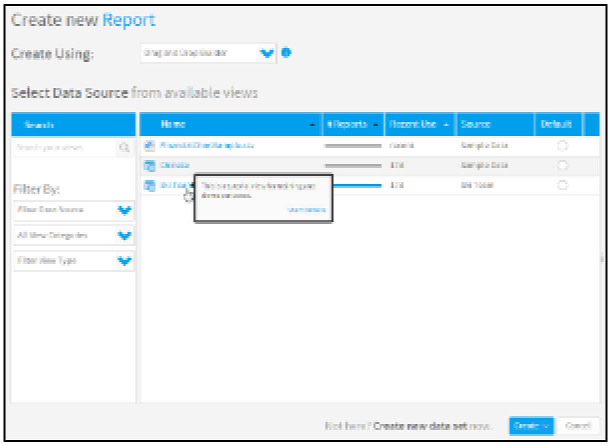
1. Click on the **Create** link and select **Report** to begin building your report.



2. You should now be on the Initialisation page. Select the **Drag and Drop Builder** as the builder type.



3. Select **Ski Team** as the View. This will now take you to the **Data** step of the builder.



Data Setup

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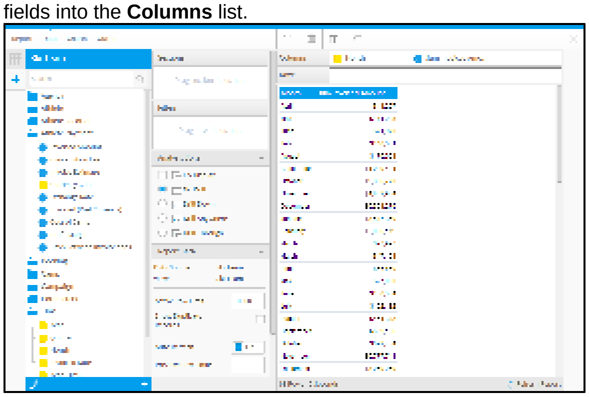
You will now need to add the metric field to be monitored by the KPI to the report.

4. Drag the **Month** and **Invoiced Amount** fields into the **Columns** list.



KPI Setup

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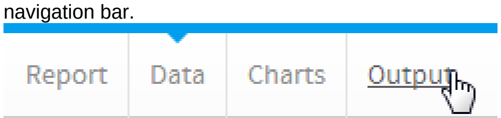
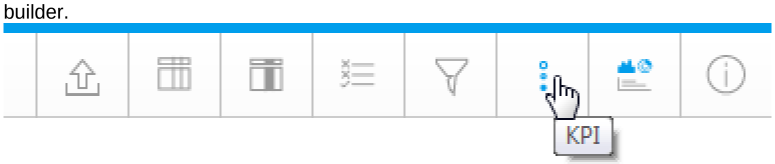
You will now need to navigate to the **Output** step of the builder to configure the KPI options.

5. Click the **Output** option in the main navigation bar.



6. Click on the **KPI** menu from the main navigation bar on the **Output** step of the builder.



Time

KPI reports require several components to be defined that are not required by standard reports. The metric to be monitored must be configured first.

7. To begin, enable the **KPI Functionality** option. This will show all the components required for the KPI.

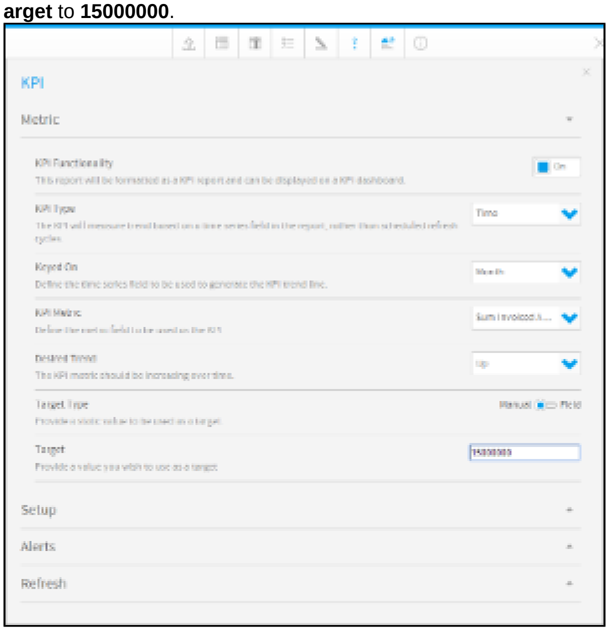
8. Set the **KPI Type** to **Time**.

9. Set the **Keyed On** to **Month**.

10. Set the **KPI Metric** to **Sum Invoiced Amount**.

11. Set the **Desired Trend** to **Up**.

12. Set the **Target Type** to **Manual** and the **T arget** to **15000000**.



KPI Alerts

The next component required for KPI reports is the Conditional Formatting Alerts displayed to the left of the kpi on the Dashboard. This icon or colour displays an alert for the current status of the value.

13. Click on the **Setup** section to open the settings available.

In this example we will be defining alerts using the icons. You can also use the Cell or Text options if you just wish to display a block of colour rather than an image.

14. Set the **Style** to **Icon** and select the **Ticks** option as the **Icon Set**.

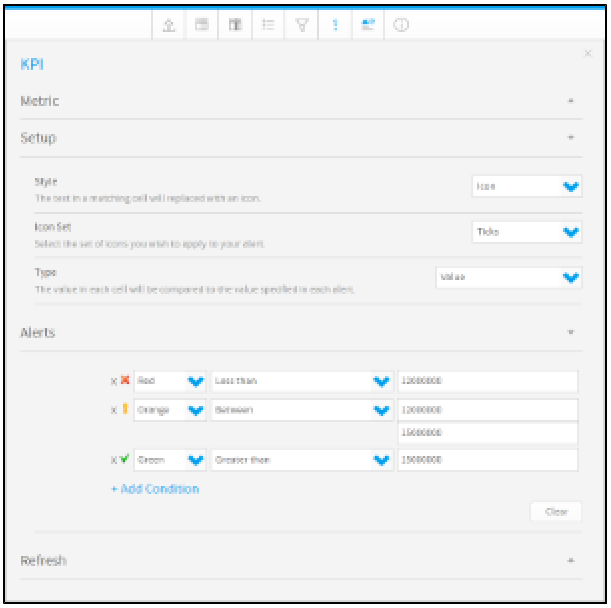
15. Define the **Type** as **Value**. This will mean that the value in the cell is compared to the alert values to check the rule, rather than another field or function.

16. Click on the **Alerts** section to open the alert rules list. This is where you will define the conditions.

17. Create three alerts:

- Red Less than 12000000
- Orange Between 12000000 and 15000000
- Green Greater than 15000000

18. Close the KPI menu by clicking on the **x** in the top right corner of the menu.



Report Save

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In order to complete the report and activate it the Save menu will need to be completed.

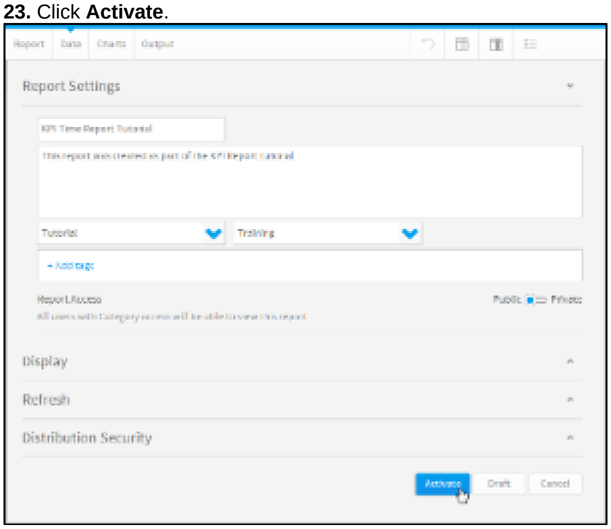
19. Click on the **Report** > **Save** option through the main navigation bar of the **Output** step.

20. Set the Name to **KPI Time Report Tutorial**.

21. Type **This report was created as part of the KPI Report tutorial** into the Description box.

22. Set the **Category** to **Tutorial** and the **Sub Category** to **Training**.

23. Click **Activate**.



Your KPI report is now complete and ready to be added to a KPI Dashboard Tab.

> *See KPI Tabs for more information.*

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