# **Categorical KPI Report**

- Create ReportData Setup
- Filter Setup
- Filter Setup
   KPI Setup

   Categorical
   KPI Alerts
   KPI 2 Excel
  - KPI Refresh Schedule
- Report Save

## **Create Report**

top

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

te begin banang jea							
Dashboard	Create	Browse	Administration	Discussion	Logout		
	+   cı	reate					
	0[]] Re	eport f					
	D	ashboard Ta	ab				
	St	oryboard					
		scussion					
	Vi	ew					

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

Create Using:	Drag and Drop Builder 💙 🚺
	Drag and Drop Builder
	CSV Import
	Freehand SQL
	Advanced Options
	Freehand MDX
	Jasper Reports

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

reate Using:		Orag and Crop Guildar 🛛 👻 🕻	•			
elect Data So	urce f	rom available views				
Search		Home	<ul> <li>Reports</li> </ul>	- Rozenii Ube 🕒	Source	Default
Search sympositions	0,	<ul> <li>American Constant Service Service</li> </ul>		- racers	Sergio Sala	0
		Carees		- 10	Samplo Data	
ilter By:		This is a state of the second	Hingand -	111	200 10000	
Fine Loss Scores	~		dam termina			
All Mew Categories	*					
Filter Hen Type	~					

## Data Setup

#### top

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

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

You will also need to provide a filter. This will ensure the data is restricted for each refresh.

## 5. Drag the Invoiced Date field into the Filters list

and the second second		·· =	Π Γ Υ		
de trans	Second Contraction	Scheme	Carveard.	🖉 dan sebesaha	
sas 9	Nagonal and Sources	-			
her ut	1	server real			
· ditte	Max	Sealers	E 97		
A second A second	Enter state				
B 315		- 10 C	14 J		
An and a set of the	11.2	-	1000		
<ul> <li>A strategie</li> </ul>		Code -	3.64		
Curva -	and the second				
Contraction	El rende la				
<ul> <li>April and</li> <li>April and</li></ul>					
Contraction of the second	O partners				
dilete e die	O TO BE READER				
size set	O TE NO MARK				
	-				
A 100 AV811					
a constatuada	Designed Billion				
Concentration of the second se					
a ser, ser	A second second				
A statistical statistic	v suphar				
<pre>endering</pre>	Acres 1				
An else	14 A 44				
<ul> <li>Spectration and a set of the se</li></ul>					

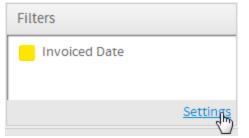
## Filter Setup

#### top

the Categorical KPI type requires a refresh schedule to be defined in order to take a snapshot of the metric value at regular points in time. This generates the trend line shown on the KPI Tab. In order to ensure each snapshot records the right range of data, a filter may need to be used as well.

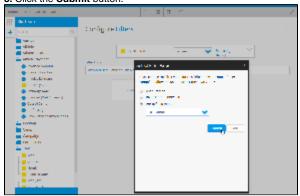
I this example we are going to set the refresh schedule to run on the first of each month. This means that we want the snapshot to capture a month's worth of data. In order to set this up we will add a filter to restrict the results to last month's data.

**6.** Click on the **Settings** link in order to set up the filter.



7. Click on the **Define Value** option and make use of the **Pre-Defined Period** option, selecting Last Month.

8. Click the Submit button.

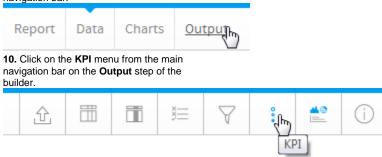


## **KPI** Setup

#### top

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

## **9.** Click the **Output** option in the main navigation bar.



### Categorical

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

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

12. Set the KPI Type to Categorical.

13. Set the Keyed On to Demographic.

14. Set the KPI Metric to Sum Invoiced Amount.

#### 15. Set the Desired Trend to Up.

## 16. Set the Target Type to Manual and the T arget to 15000000.

(PI	
fetric	*
KPI Functionality	<b>•</b> 04
This report will be formatized as a KPI report and can be displayed on a KPI dashboard.	-
KPI Type	Catogorical 🗸 🗸
The NTL will measure trend based on schedules refersivipiles. The should contain the RTL metric, with the option of a collegencial liekt to break the figure down further.	
Keyed On	Dermagnaphie 💙
Define the category field used to split up the KPI metric.	
KPI Malanc	Sum i svojcod A 💙
Define the cost of field to be used as the RPA	
Desired Triend	10 <b>V</b>
The KPI metric should be increasing evertime.	
Target. Type	Planual 📜 🗆 Pick
Provide a slight value to be used as a larget.	
Tanget	1500000
Provide a value year when to use as a tanget	
ietup	-
derts	*
tefresh	

### **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.

**17.** 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.

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

**19.** 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.

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

21. Create three alerts:

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

				*
				*
ing cell will repla	ced with an icon.		ica a	~
ns you witch to ap	ipty to your allert.		Tido	~
el will be compa	et to the value specified in	exh aler.	Vol ao	~
Ned 1	Lass than	~	12080808	
Crange •	Between	~	12080808	
			15080800	
V Green	Creatier then	~	15080808	
Add Conditio				
	is you which to ap of well be compose <b>X</b> Read <b>1</b> Change	X Rod 💉 Lauthan I Orange 💓 Between	Is you with to apply to your allert.	the compared to the column specified in each allest.

### **KPI Refresh Schedule**

**22.** Click the **Refresh** section to open the scheduling area. In standard reports the refresh schedule is defined in the Save menu, but KPI reports use the KPI menu instead.

23. Set the Refresh Settings to be updated  ${\bf P}$  eriodically.

24. Set the Schedule to be the First day of each Month.

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

	企	10	18	Ξ	A	1	#2				
(PI											
letric											
ietup											
ilerts											
Refresh											
Refrech Settings Deta in this report will be r	chester	f on a sc	th edule	ti basib.						Hansally ( riodically (	
Frequency									Neethly		•
Scheduled Day										1	
								Task with run every	month	e Littory of a	e

## **Report Save**

#### top

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

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

27. Set the Name to KPI Categorical Report Tutorial.

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

29. Set the Category to Tutorial and the Sub Category to Training.

30. Click Activate.

Ворогт	Data	Charts	Output				£			30	Y	1
Repo	ort Set	ttings									÷	
17	1 Cathrg	esteal Page	et Tatorial									
*	is repor	twis dei	ted as part of th	ie SPI Report Laik	riel.							
T	rorial			Y Training		~	•					
	Add too	81										
	PORTLAND		y access will be	able to view this	ogat.				Pub	R 🗶	Privato	
Displ	ay										^	
Refr	zsh										^	
Distr	ibutio	n Secu	rîty								~	
							1.00	Ъ	Draft	0	Isona	

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

See KPI Tabs for more information.

top