

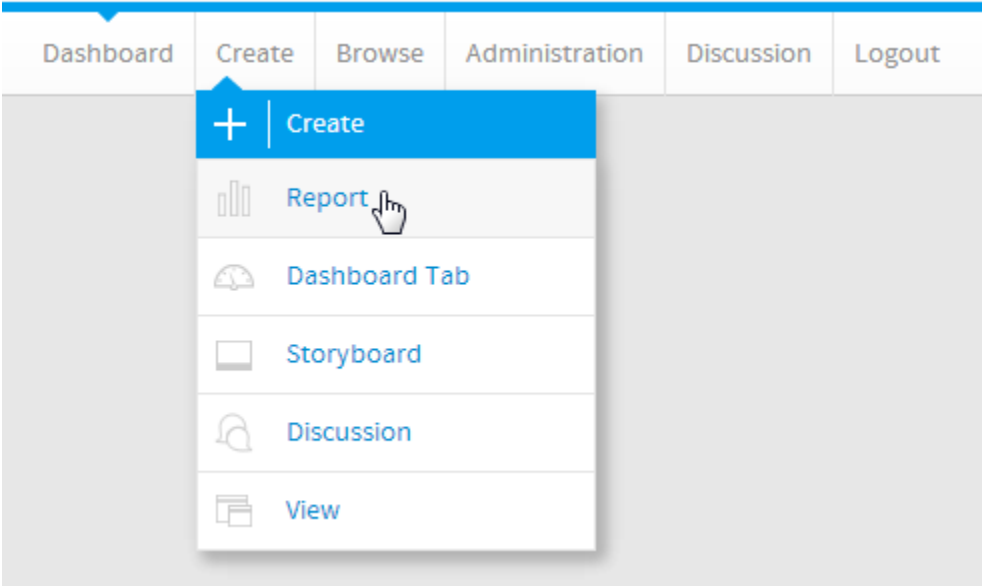
# Categorical KPI Report

- [Create Report](#)
- [Data Setup](#)
- [Filter Setup](#)
- [KPI Setup](#)
  - [Categorical](#)
  - [KPI Alerts](#)
  - [KPI Refresh Schedule](#)
- [Report Save](#)

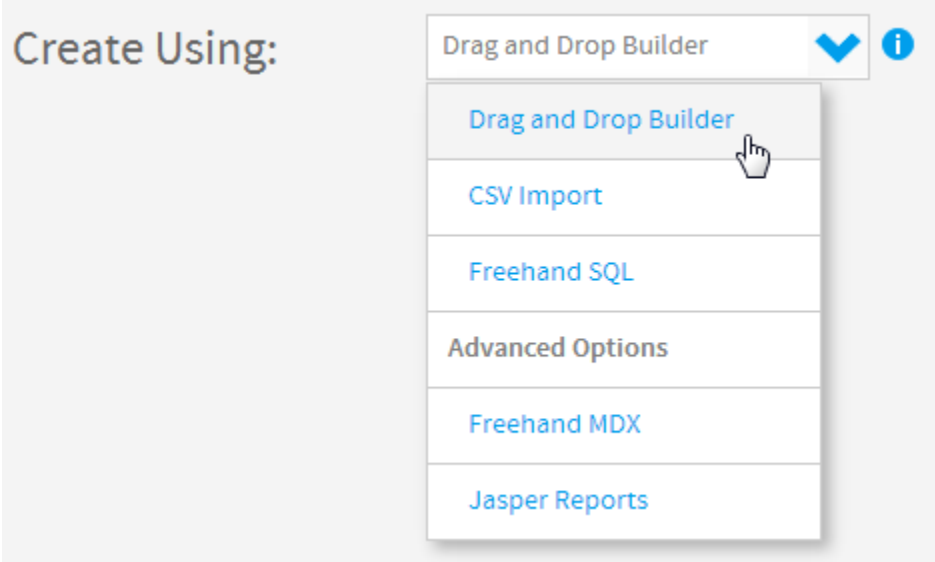
## Create Report

[top](#)

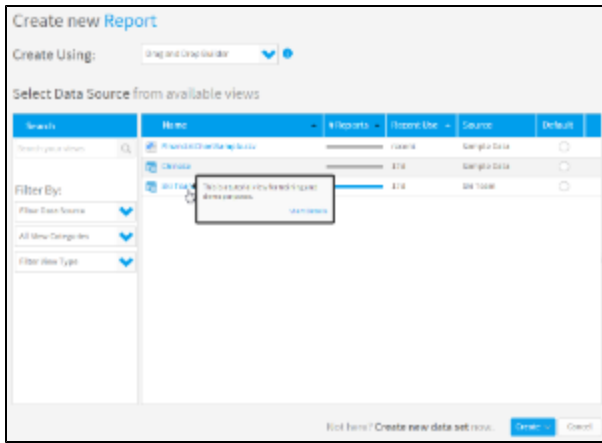
1. Click on the **Create** link and select **Report** to begin building your report.



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

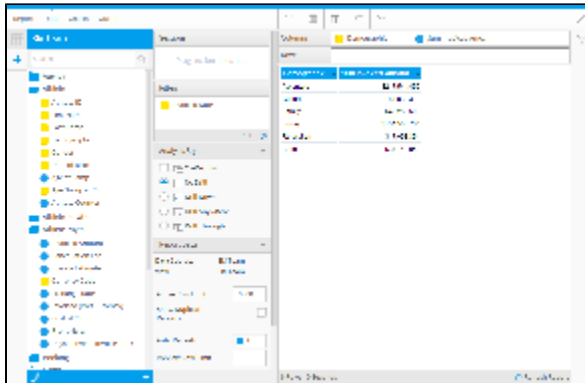
[top](#)

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.



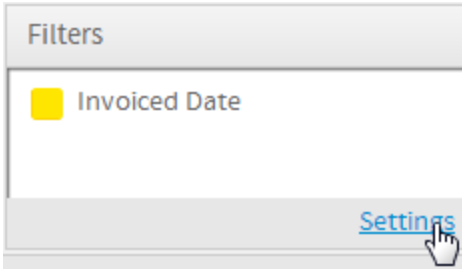
## Filter Setup

[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.

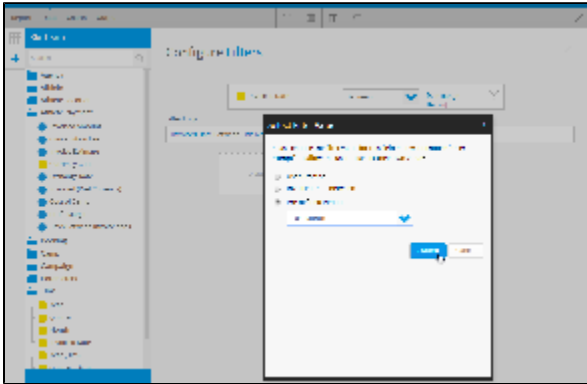
In this example we are going to set the refresh schedule to run on the first of each month. This means that we want the snapshot to capture a month's worth of data. In order to set this up we will add a filter to restrict the results to last month's data.

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.

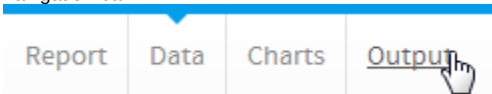


## KPI Setup

[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.



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



## 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 **Target** to **15000000**.

The screenshot shows a 'KPI' configuration window. At the top, there's a 'Metric' dropdown. Below it, 'KPI Functionality' is set to 'On'. 'KPI Type' is set to 'Categorical'. 'KPI Metric' is set to 'Sum of Invoiced Amount'. 'Desired Trend' is set to 'Up'. 'Target Type' is set to 'Manual'. The 'Target' value is entered as '15000000'. At the bottom, there are sections for 'Setup', 'Alerts', and 'Refresh', each with a right-pointing arrow.

## 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

The screenshot shows the 'KPI' configuration window with the 'Alerts' section expanded. It displays three alert conditions:

- Red** (X icon): Last than 12000000
- Orange** (X icon): Between 12000000 and 14000000
- Green** (X icon): Greater than 15000000

Each condition has a color selection dropdown, a comparison operator dropdown, and a value input field. There is a '+ Add Condition' link and a 'Clear' button at the bottom right of the Alerts section.

## 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 **Periodically**.

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.

The screenshot shows the 'KPI' configuration window with the 'Refresh' section expanded. It displays the following settings:

- Refresh Settings:** Data in this report will be refreshed on a scheduled basis.
  - Manually:** ☐
  - Periodically:** ☒
- Frequency:** Monthly (dropdown)
- Scheduled Day:** 1 (input field)
- Advanced Settings:** ☐

A note at the bottom states: 'Task will run every month, on the 1st day of the month'.

## 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**.

Report Settings

KPI Categorical Report Tutorial

This report was created as part of the KPI Report tutorial

Tutorial Training

+ Add tags

Report Lifespan  
All users with Category access will be able to view this report

Public Private

Display

Refresh

Distribution Security

Activate Draft Cancel

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

See [KPI Tabs](#) for more information.

[top](#)