# KPI Tab


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## Getting Started

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There are three different types of KPI Report available in Yellowfin:

| | |
|---|---|
| **Spot** | Basic KPI Report that allows you to set up a KPI without displaying any additional information, other than the value itself. |
| **Categorical** | KPI Report that splits what's displayed on the tab into categories when viewed as a report. This allows you to display break up the value into categories for further examination. |
| **Time** | KPI Report that allows you to show a trend according to time series data, rather than real-time trends. It also allows you to show more detail in the report (like a Categorical KPI). |

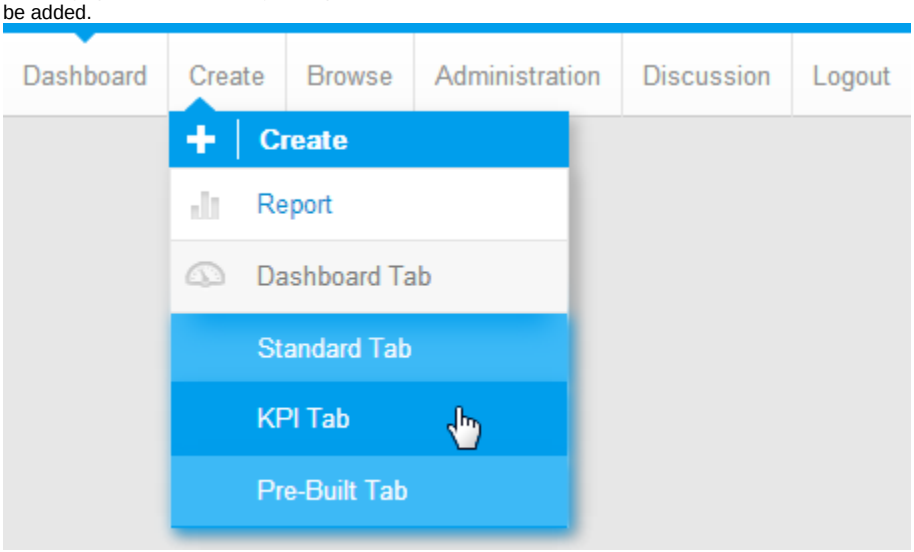
You will need to create at least one of these before attempting this tutorial.

> *See KPI Report Tutorial for more information.*

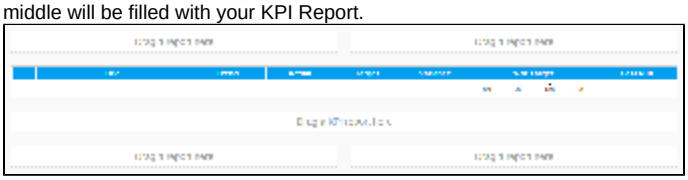
## Creating a KPI Tab

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**1.** Now that you have created a KPI Report, you can create a KPI Tab. Click on the Add Tab link and select the KPI Tab option. This will bring up a blank tab, ready for reports to be added.

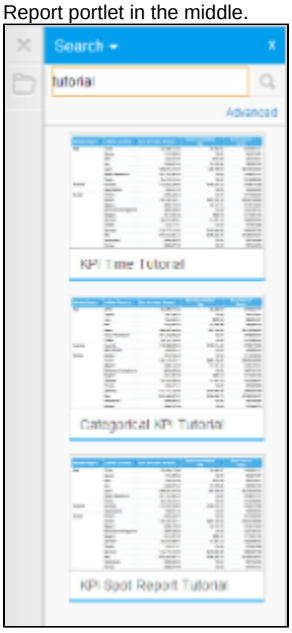



**2.** As you will have noticed, this tab looks a little different to the other tabs you have worked with so far. The empty scale in the middle will be filled with your KPI Report.



**3.** To add a report to the dashboard you will need to search for it in the list of active reports. Type **KPI Tutorial** into the search box and click on to see results.

**4.** Add all three of the KPI reports to your tab, you will need to drag them into the KPI Report portlet in the middle.




**5.** Your tab should now look like the one pictured.

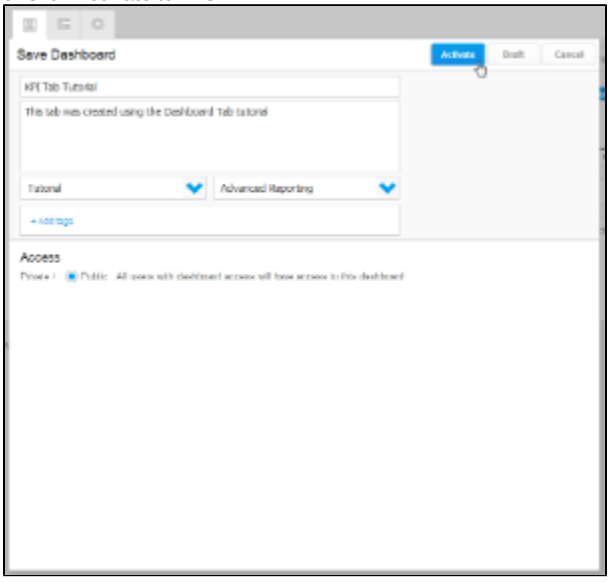


**6.** You have now finished creating your KPI Tab so it's time to Save and Activate it.

**7.** Click on the Save Menu and enter **KPI Tab Tutorial** in the Name field.

**8.** Type **This tab was created using the Dashboard Tab tutorial** in the Description box.

**9.** Click **Activate** to finish.




## Reading and using the KPI Tab

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Now that you have a finished KPI Tab and Report it's time to learn what it all means.

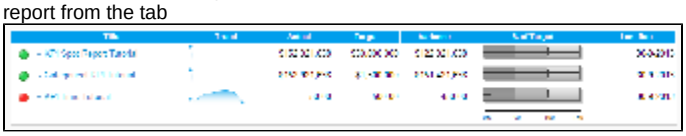
**1.** Click on the ▼ next to the name of the KPI Report. This opens up the menu pictured.

**2.** From here you can reorder your KPI Reports (if you have more than one, and if the tab is in Edit mode) by clicking on the **Mov e Up** and **Move Down** options

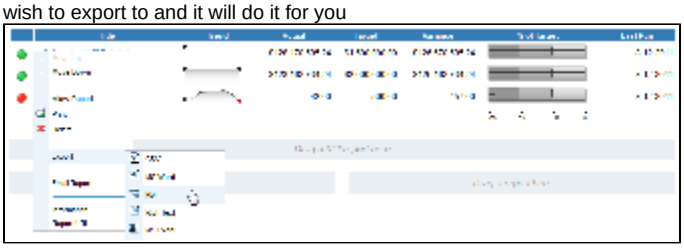
**3.** You can view the original report by either clicking on the **View Report** option or clicking on the name of the report itself

**4.** You can select the **Print** option to generate a hard copy of the report

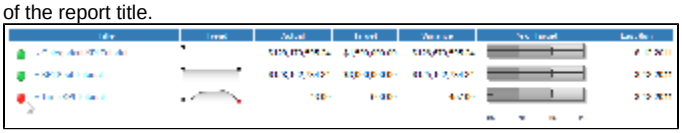
**5.** You can the **Delete** option to remove the report from the tab



**6.** You can **Export** the report to various other programs. A list will open when you click on the option, simply choose the program you wish to export to and it will do it for you

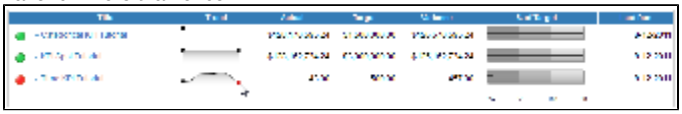


**7.** Now, remember the conditional formatting alerts you set earlier? They appear to the left of the report title.

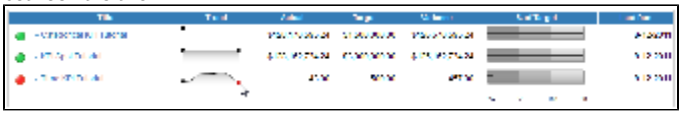


**8.** The **Trend** field is displayed using a Sparkline Graph. This compares the current version of the KPI report run with the previous version, indicates change and whether it is positive or negative.

**Note:** the sparkline only appears for the time KPI as this is using historical data. The other KPIs will generate a sparkline when they have run more than once.



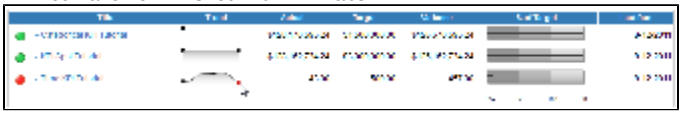
**9.** The next fields display the **Actual**, which is the current value of the metric, the **Target**, which you set earlier, and the **Variance** between the two.



**10.** The **% of Target** is a Bullet Chart that helps visualise performance and lets you compare all metrics on an equal basis.

**11.** Finally, the Last Run field tells you when the report was refreshed.

**12.** You have now finished with KPI Tabs.



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