



Measure/KPI Definitions - 1

When Measures (or KPIs) are created it is important to understand exactly what the terms used by the application mean.

Create Measure

The screenshot shows the 'Create Measure' form with the following fields and options:

- Name:** A text input field (A).
- Type:** A dropdown menu with 'Measure' selected (B).
- Description:** A large text area (C).
- Advanced Options:** A button to expand more settings.
- MEASURE DETAILS:**
 - Scoring Type:** A dropdown menu with 'Goal/Red Flag' selected (D).
 - Calendar:** A dropdown menu with 'Monthly' selected (E).
 - Data Type:** A dropdown menu with '# Number' selected (F).
 - Aggregation Type:** A dropdown menu with 'Sum' selected (G).
 - Decimal Precision:** A dropdown menu with 'Default' selected.
- SERIES:**
 - Actual Value:** A dropdown menu with 'Manual' selected (H).
 - Red Flag:** A dropdown menu with 'Manual' selected (I).
 - Goal:** A dropdown menu with 'Manual' selected (J).
 - Default Value:** Two text input fields for 'Default Value'.
- OWNERS:** A section with 'Add Owner...' (K).
- UPDATERS:** A section with 'Add Updater...' (L).

- A. **Name** - a label that is 3-5 words long
- B. **Type** - this will be Measure (for QuickScore) or KPI (for Scoreboard)
- C. **Description** - this is optional but it is good practice to provide a description which includes where the metric data can be found.

Measure Details Box:

- D. **Scoring Type** - the scoring type can be one of eleven types. On most occasions this will be Goal/Red Flag (Red/Amber/Green)



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- E. **Data Type** - the application can handle Currency, Percentage, Numeric and Yes/No data
- F. **Calendar** - the frequency at which data is collected for the Measure. This is usually Monthly but can be Weekly, Quarterly or Yearly as standard. You can also define a 'custom calendar' in the administration section and set your collection frequency to the defined 'custom' variation.
- G. **Aggregation Type** - this tells the application what to do with actual values when *viewing* them using a calendar other than the frequency collected calendar defined above.

For a **Currency** the aggregation type is normally **Sum**. For example, when looking at monthly Revenue with a yearly calendar, by setting the Aggregation Type to Sum, the *Revenue* will be summed-up to provide a yearly total.

For a **Percentage** the aggregation type is normally **Average**. For example, When looking at a monthly *Customer Satisfaction* percentage with a yearly calendar, the monthly percentages will be added together and divided by twelve to provide a yearly average.

Series Box:

- H. **Actual Value** - the actual value of the Measure, that is the data that will be added once the Measure has been created, can be added Manually (which includes importing from other sources, see the Importing Actual Values guide) or Calculated from other measures within the system (see the Calculated Measures guide)

Thresholds: You need to tell the application when you expect a Metric to turn red (from amber) and green (from amber) or optionally blue or orange.

- I. **Red Flag (threshold)** - if a measure/KPI is deemed to be in the Red below \$25,000, the the Red Flag value is \$25,000
- J. **Goal (threshold)** - if a Measure/KPI is deemed to be in the Green above \$30,000, the Goal value is \$30,000



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Owners Box:

- K. **Owners** - an owner can be assigned to any object in the system including Measures/KPIs. Measures/KPIs can have multiple owners or be owned by a group, however, this is not good practice.

Updaters Box:

- L. **Updaters** - an updater can be assigned to a Measure/KPI. Once assigned they will have permission to update the Measure/KPI. Measures/KPIs can have multiple updaters or be updated by a group, however, this is not good practice.