KPIs - Traffic light & gauge

Introduction

This Quick guide will show you how to Add and edit a traffic light in the dashboard. The data that needs to be filled in is; name, KPI's and filter. In the end you have setup a traffic light in dashboard.

Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software.

On the last page it is described how to set up the Security to activate, view and edit the described tool.

The guide *may* contain important general notices. These will be marked with an exclamation icon.

Tips and tricks are marked with an Info-icon.

Questions & Answers note relevant to the topic at hand.

Introduction

1 Open Add Element

Open **"My dashboard"** from the navigation ribbon, a new tab opens. Click **"Edit layout"** from the navigation ribbon and choose **"Add Element"**.
From the opening window click to select **"Traffic Light"** or **"Gauge"**.

These function the same way in "My dashboard" as in "Shared dashboard" and any other report.

NB! It is recommended to start adding elements in **"My dashboard"** for practice and when you feel comfortable you can start setting up the **"Shared dashboard"**.

2 Configure KPIs

You can display **KPIs** in two different ways:
- **Gauges**
- **Traffic light**

The configuration of the two is identical. It is only the display that differs.

Traffic lights and gauges are build up by comparing two values.

You can add as many KPIs as you need to keep track of your business.

3 Placing elements

When you have selected an element you need to find where to place it on the dashboard.

The first element you add will automatically fill the working area.

The second will appear in a pop-up window next to the cursor on the screen.

Click the header of the element and hold to move it. A docking assistant appears on the screen where you can dock the element in the appropriate position.

Drag the element to one of the five docking areas (highlighted in red) to dock the window in the middle of the screen. Each docking area indicates the position of the element after it has been docked. The area in blue indicates where the element will be docked.

If you place the element in the middle docking area of an existing element (second picture), the window will be placed in another tab than the first one. This creates different tabs in the bottom of the first tab (third picture).
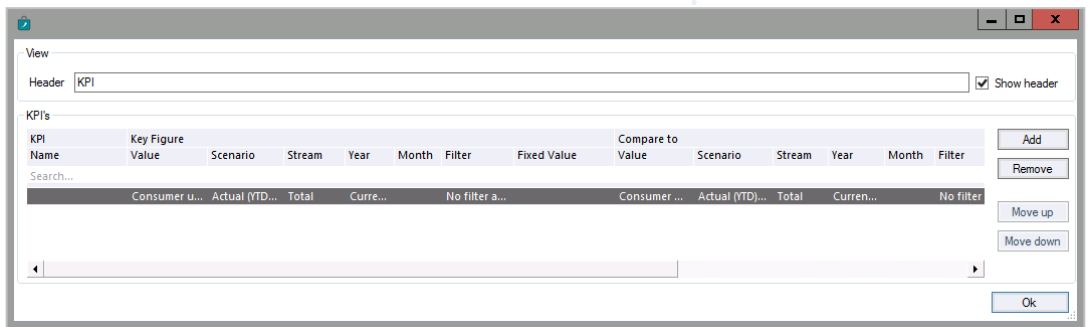
The docking area in the outer edges (fourth picture) of the tab places the element in the outer edges. If you place the element in the bottom of the tab, and then remove the first element, the second element will remain in the bottom of the tab.

4 Configure KPIs

Click **"Close Edit Layout"** from the navigation ribbon to save your new layout.

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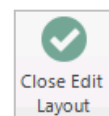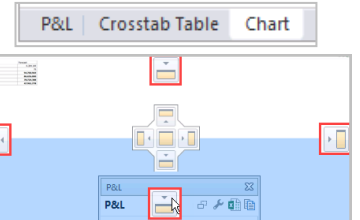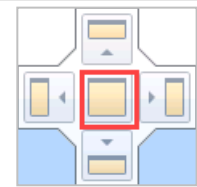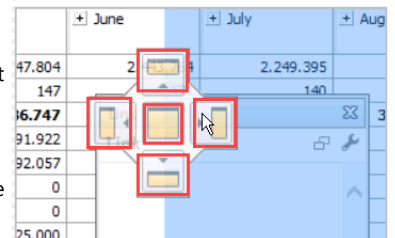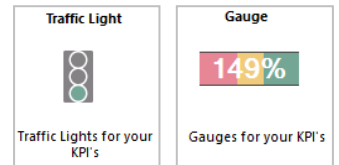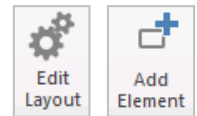
Configuration

Above you see the window that appears when you add a **Gauge** or **Traffic light**.

In KPI's you add your KPIs and configure the values to every KPI.

- KPI:
  Name: Enter the name of the gauge.
- Key figure:
  Value: Enter the units/P&L lines of the KPI.
  Scenario: Select the scenario you want.
  Stream: Select the stream you want.
  Year: Select the year the values of the KPI should be measured in.
  Month: Select the month the values of the KPI should be measured in.
  Filter: Click in the filter field to add a filter to the KPI.
  Fixed value:
- Compare to:
  Value: Enter the units/P&L lines of the KPI you want to compare the first KPI to.
  Scenario: Select the scenario you want.
  Stream: Select the stream you want.
  Year: Select the year the values of the KPI should be measured in.
  Month: Select the month the values of the KPI should be measured in.
  Filter: Click in the filter field to add a filter to the KPI.
  Fixed value:
- Thresholds:
  Low limit: Select the lowest limit for the threshold.
  High limit: Select the highest limit for the threshold.
  Color shema: Here you can select the order of the lights of either the traffic lights or the gauges.

Gauge specific:

- Scale:
  From: From percent.
  To: To percent.

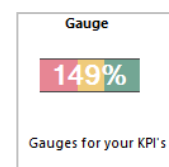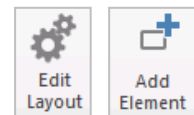## Create a gauge

1 Add KPI information

Open **"My dashboard"** from the navigation ribbon, a new tab opens. Click **"Edit layout"** from the navigation ribbon and choose **"Add Element"**. From the opening window click to select **"Gauge"**.

Here the following fields for comparison are filled out:

- Value
- Scenario
- Stream
- Year

Additionally:

- Thresholds:
  - Low limit, High limit and Color schema
- Scale:
  - From and to

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KPI's																	
	Key Figure							Compare to						Thresholds			Scale
KPI Name	Value	Scenario	Stream	Year	Month	Filter	Fixed Value	Value	Scenario	Stream	Year	Month	Filter	Fixed Value	Low limit	High limit	Color schema	From	To
Search...																	
	Consumer units	Actual (YTD) + ...	Total	Current year		No filter app...		Consumer units	Actual (YTD) ...	Total	Current year		No filter app...		90	110	Red-Yellow-...	50	200

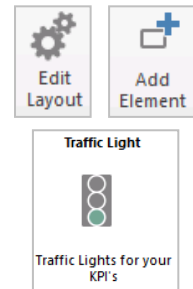In the picture above you can see the information we have entered in our example.

It will turn out to look like the picture to the right.

Create a traffic light

1 Add KPI information

Open **"My dashboard"** from the navigation ribbon, a new tab opens. Click **"Edit layout"** from the navigation ribbon and choose **"Add Element"**. From the opening window click to select **"Traffic Light"**.

Here the following fields for comparison are filled out:
- Value: Net sales, Total promotion allowance and Sales margin.
- Scenario: Actual (YTD) + Forecast (YTG).
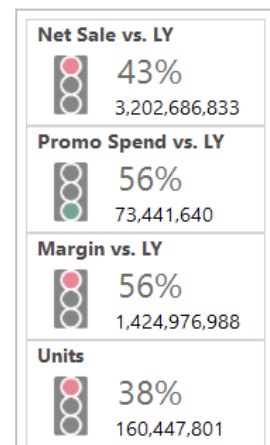- Stream: Total.
- Year: Current year.

Additionally:
- Thresholds:
  - Low limit: 90
  - High limit: 110
  - Color schema: Red-yellow-green, Green-yellow-red and Red-yellow-green.

In the picture above you can see the information we have entered in our example.

It will turn out to look like the picture to the right.
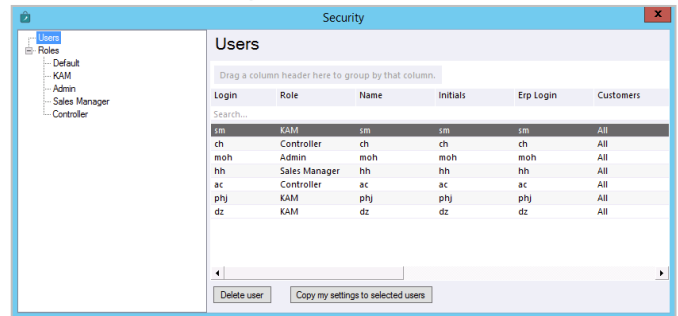
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Security - User Roles

For a user to view and edit the Reports in the system, access needs to be granted from Security settings by a super-user/admin.

(i) Security

From **"File"** select **"Security"** and the window with all the users in the system and the roles assigned to each one will open. Select a role to open the corresponding settings.

(i) Allow View & Edit Reports

Check mark the boxes to allow the role to view and edit:

Standard reports - mark **"System"** to allow to work with standard BMS reports.

Company reports - mark **"Access report folder"** to allow access to the corresponding folder with company specific reports.

User reports - mark **"Allow user reports"** to allow the role to build his/her private reports.

Edit dashboard - mark **"Frontpage", "User dashboards"** and **"Company dashboards"** to allow access to the corresponding dashboards.

Report Packs - mark **"Manage Report Packs"** and **" Access Reports Packs"** to allow view and edit of the report packs.

Company dashboards - mark the **"Report folder X"** to allow access to the corresponding report folders.

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