KPI Tabs

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Overview

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KPI Tabs are a unique dashboard tab which present reports to the user in the form of KPI metrics. These assist an organisation to understand its goals and objectives – essentially, the direction in which they want the enterprise to progress. To help with this analysis key performance indicators (KPIs) are laid down to assess the present state of the business.

The KPI tab differs from a standard dashboard tab in that Reports are run as a regular task against predefined targets – the results include:

1. Current Status
2. Trend of the report over time
3. Actual versus target and variance
4. And the last relevant time period (as displayed below)

	Title	Trend	Actual	Target	Variance	% of Target	Last Run
↓	▾ Invoiced KPI		$334,146	$1,000,000	$-665,854		1-7-2013
↓	▾ Profit KPI		$167,159	$500,000	$-332,841		1-7-2013
↑	▾ Profit Margin KPI		167,159%	40%	167,119%		1-7-2013
↑	▾ Athlete KPI		20	90	-70		1-7-2013
↑	▾ Yearly Invoiced KPI		$6,709,158.09	$6,000,000.00	$709,158.09		25-6-2013

Benefits of this style of tab include:

1. Data is easy to interpret – users can quickly identify which business measures are on target or not.
2. Multiple Metrics can be displayed on a single tab for quick access
3. Trends in the report are displayed providing users with an understanding of both current status and direction of the data.

See also: KPI Tab Tutorial

Creating a KPI Tab

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1. The creation of a KPI tab is similar to a standard tab. Simply click the **Create** option in the main navigation bar, select **Dashboard Tab** > **KPI Tab**.
2. This will return you to the tab where you can add reports by searching for them in the report list in the left hand side and dragging them onto portlets.

See KPI Reports and Dashboard Overview for more information.

Using a KPI Tab

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The KPI tab structure allows you to quickly browse the status and trend of your Key Performance Indicators.

	Title	Trend	Actual	Target	Variance	% of Target	Last Run
↑	▾ Yearly Invoiced KPI		$6,709,158.09	$6,000,000.00	$709,158.09		25-6-2013

Status	The status will display an icon that indicates whether or not the measure has met your target thresholds.
Menu	The menu drop down lets you manage the KPI report. You can view, print email, and export it.

Title	The title of the KPI metric. Click on the hyperlink to see detail.
Trend	The trend compares the current version of the KPI report run with the previous versions and indicates whether there has been a change in the trend, the direction of the trend and whether the trend is good or bad.
Actual	The current actual value of the metric as returned in the report.
Target	The target value as set for the KPI metric
Variance	The difference between the Actual and Target values.
% of Target	A bullet chart that assists you to visualize performance and compare all metrics on an equal basis.
Last Run	The specific date for when the KPI is relevant.