DE KPI Manager – User Guide

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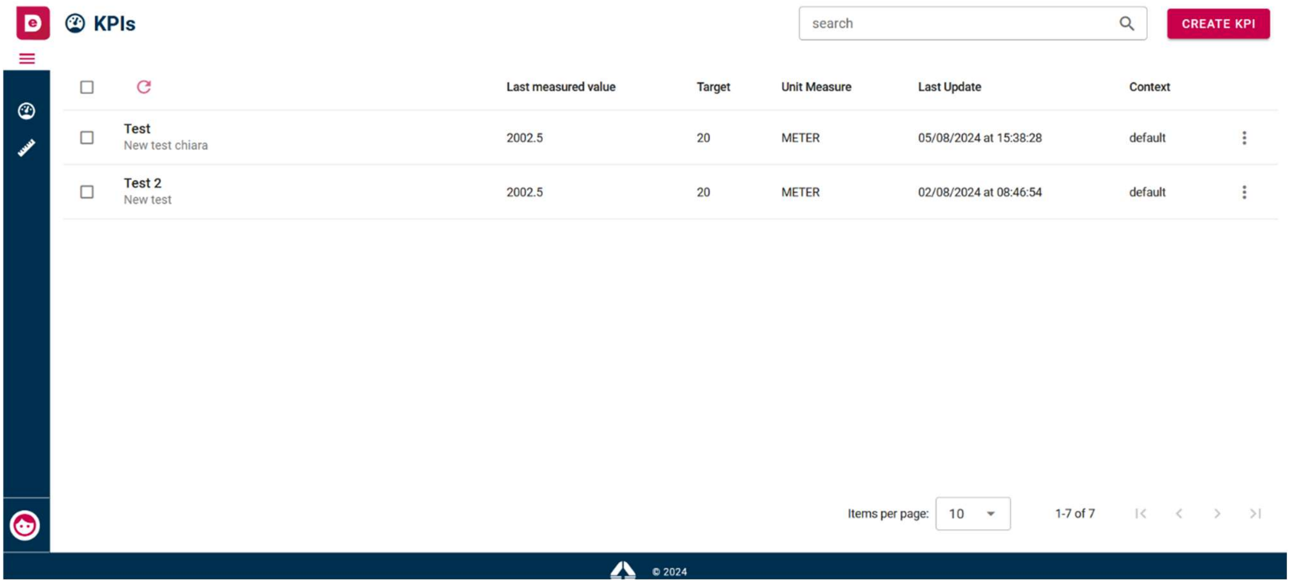
Getting Started

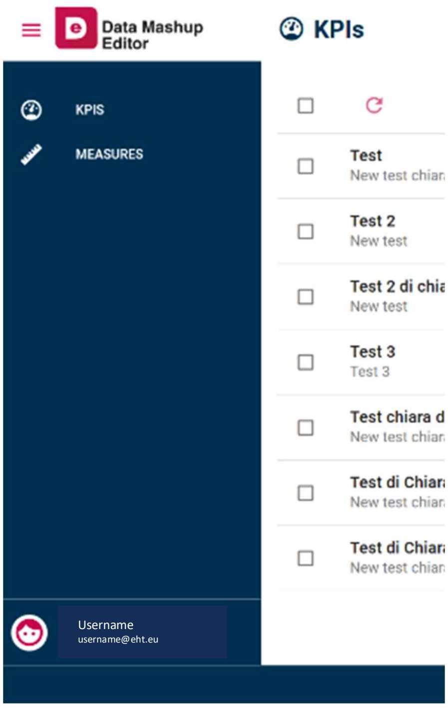
When you first open DE KPI Manager, you'll be presented with the main dashboard where you can view, create, and manage your KPIs.



Navigating the Interface

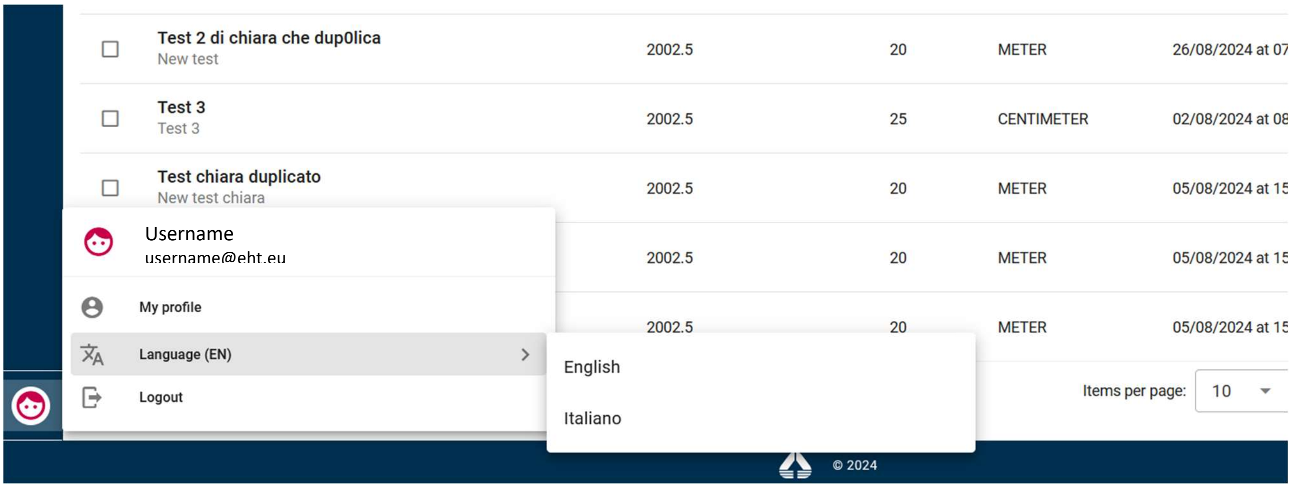
Main Menu:

- Located on the left sidebar, the main menu provides access to two primary sections:
  - **KPIs:** View and manage your KPIs.
  - **MEASURES:** Access measures that contribute to your KPIs.



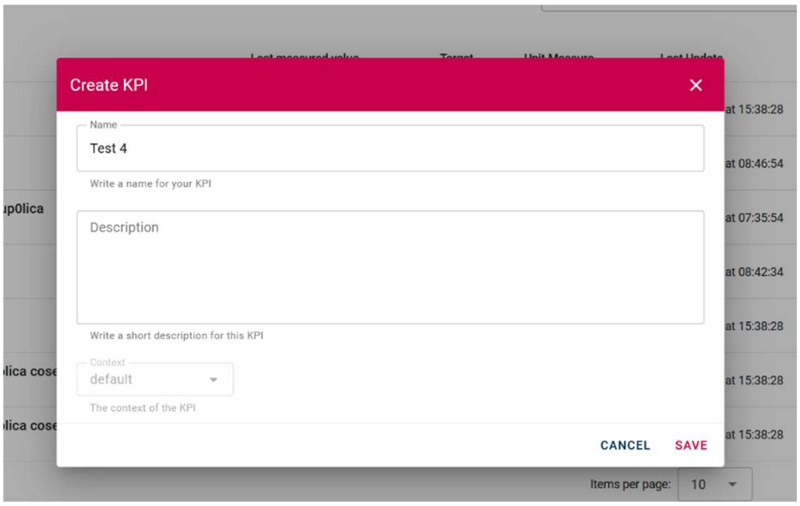
User Profile & Settings:

- Located at the bottom left, you can manage your profile, switch languages, and log out.
  - **Language Settings:** Toggle between English and Italian for the interface language.



Creating a KPI

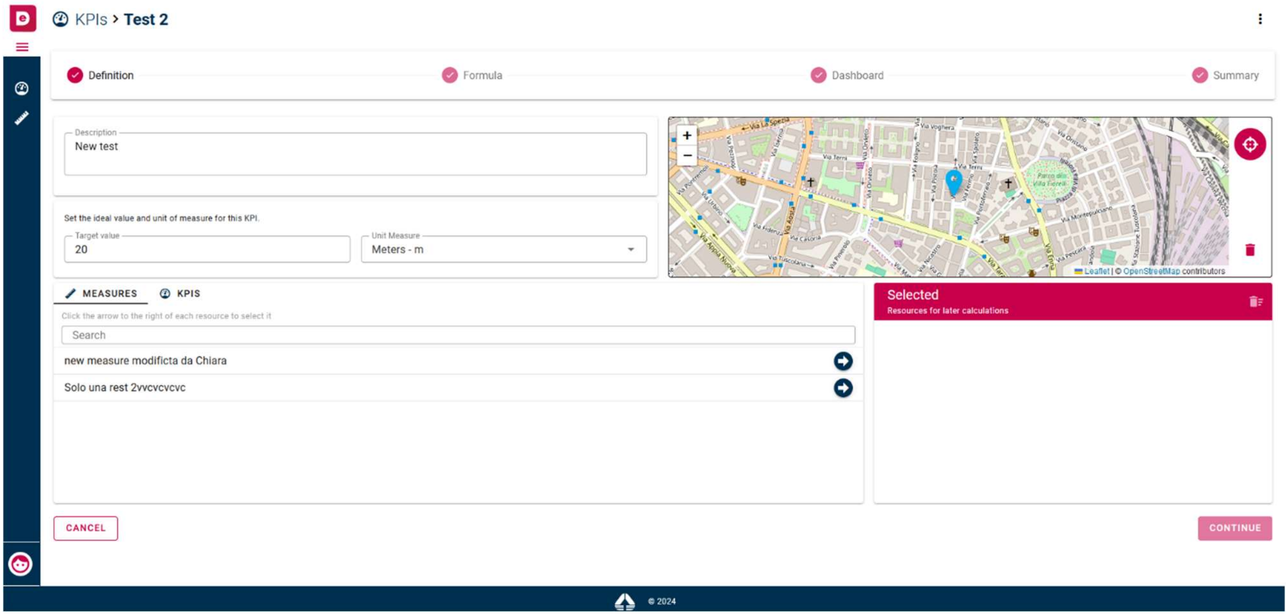
1. **Accessing the KPI Creation Tool:**
   - Click the "CREATE KPI" button at the top right of the KPIs section.
   - A form will appear where you can define your KPI.



2. **Entering KPI Details:**
   - **Name:** Enter the name of your KPI.
   - **Description:** Provide a brief description.
   - **Target Value:** Specify the target value you wish to achieve.
   - **Unit Measure:** Select the unit of measurement from the dropdown menu.
   - **Context:** Choose the context for the KPI (e.g., default, custom contexts).

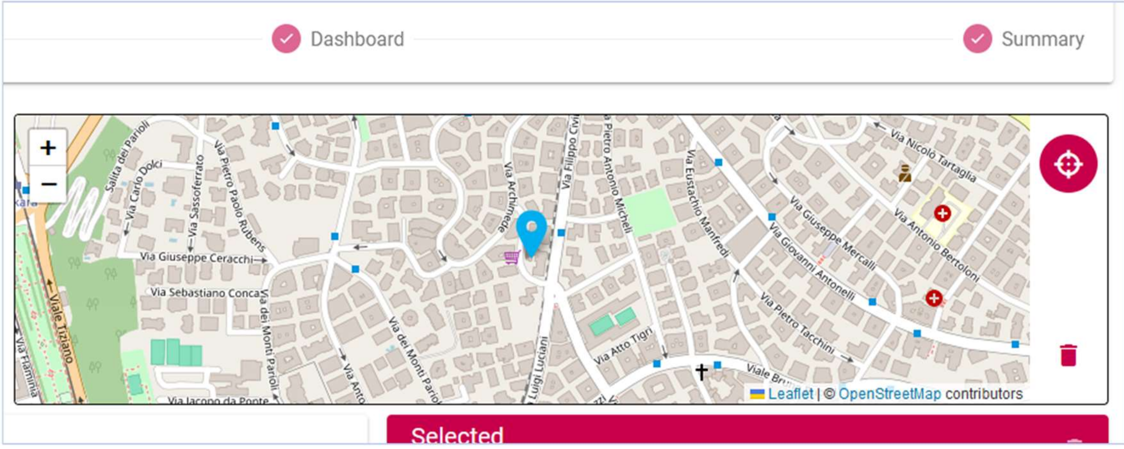
3. **Saving the KPI:**
    - Click "SAVE" to create the KPI, or "CANCEL" to discard the changes.

Defining KPIs



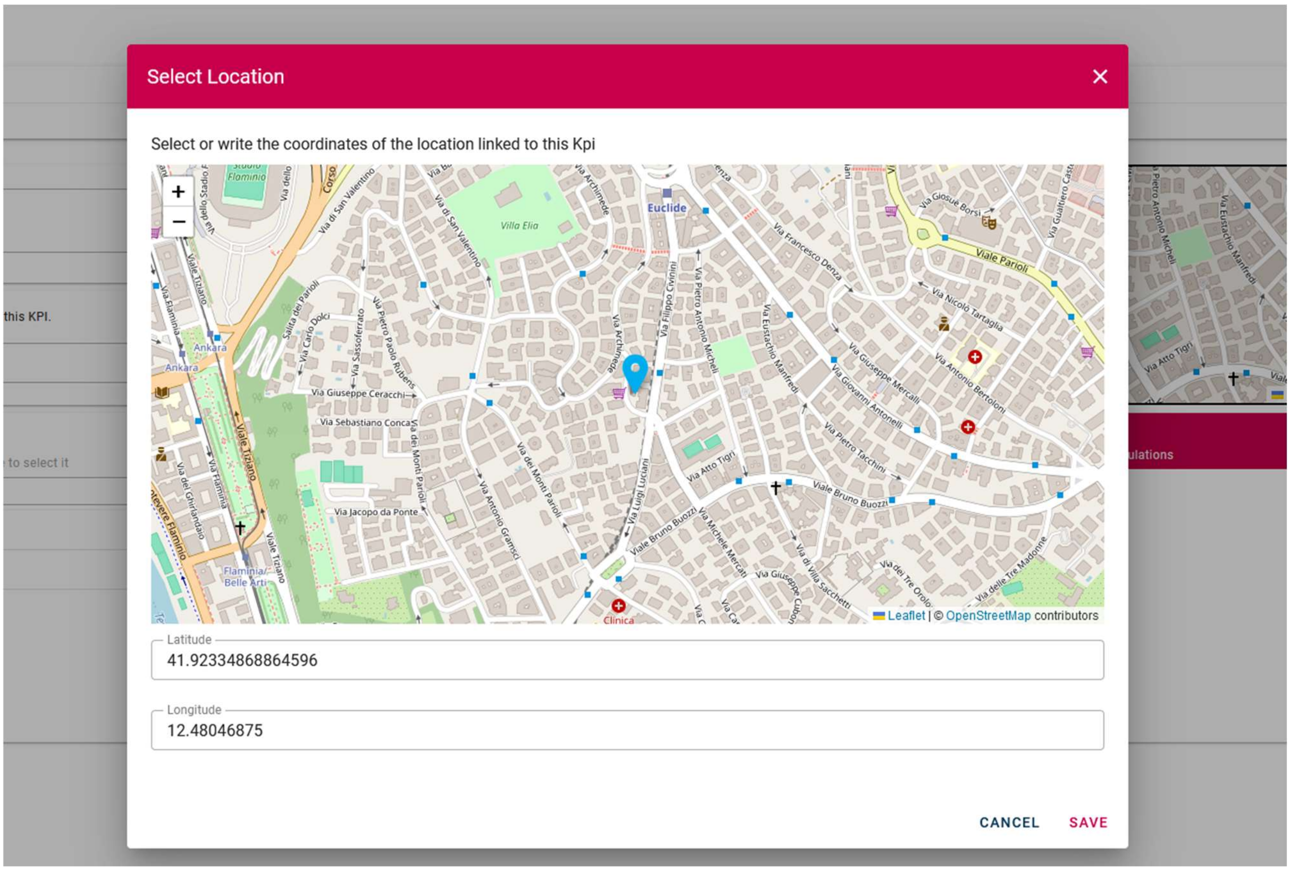
After you click on "SAVE" in the form where you have typed the name for your new KPI, the next step is to define the KPI in detail. This process involves setting the ideal value, choosing the unit of measure, and linking relevant measures or existing KPIs that will contribute to the calculation of this KPI. Here's how to complete the Definition step:

1. **Enter the Description:**
    - In the "Description" field, provide a brief summary of what this KPI measures. This will help you and others understand the purpose of the KPI at a glance.
2. **Set the Target Value:**
    - Input the ideal target value you want to achieve for this KPI in the "Target value" field.
    - Select the appropriate unit of measure from the "Unit Measure" dropdown. This unit could be meters, Liters, percentage, etc., depending on the KPI's nature.
3. **Link Measures or KPIs:**
    - Under the "Measures" or "KPIs" tab, search for and select existing measures or KPIs that should be linked to this new KPI.
4. **Map Integration:**
    - If your KPI has a geographic component, use the map section to select or visualize relevant locations. This can be useful for KPIs related to regional performance or location-specific metrics. To access the map integration feature:



1. **Opening the Map:**

- Focus on the map section on the right side of the screen.
- Click on the **target icon** located next to the map. This action opens a larger map interface.



2. **Selecting a Location:**

- In the map interface, you can either click directly on the map to drop a pin or manually enter the latitude and longitude coordinates in the respective fields.
- The location you select will be marked with a blue pin on the map, indicating the geographic point associated with your KPI.

3. **Saving the Location:**

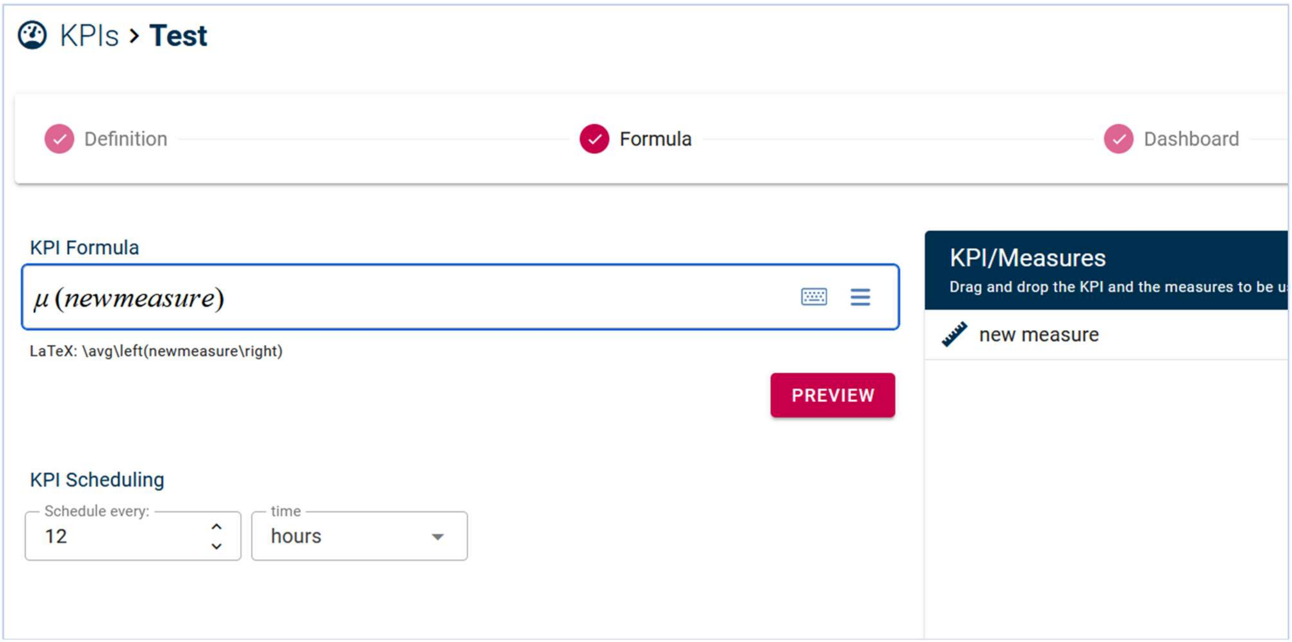
- After selecting the desired location, click on the "SAVE" button to associate this location with your KPI.
- The selected location will then appear in the map section on the "Definition" page.

4. **Removing a Location:**

- If you decide that the location is no longer relevant to the KPI, you can easily remove it by clicking on the **bin icon** next to the map.
- This action will clear the map of the selected location and reset the fields.

5. **Review and Continue:**
   - Once all details are filled in, review the information for accuracy.
   - Click "CONTINUE" to proceed to the next step, which involves setting up the formula, the dashboard visualization, and the final summary for the KPI.

Writing KPI's formula

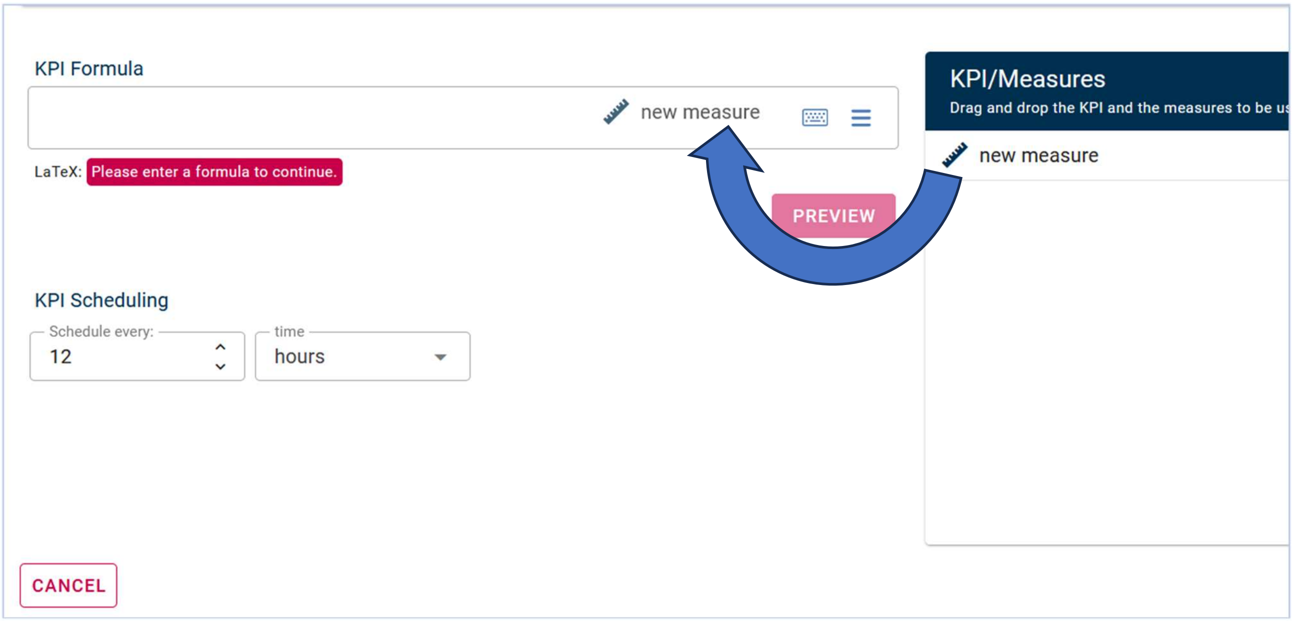


After defining your KPI, the next crucial step is to create the formula that will be used to calculate the KPI values. The formula is constructed using the measures you have linked to the KPI during the definition phase. Here's a detailed guide on how to create a valid KPI formula:

Creating a KPI Formula

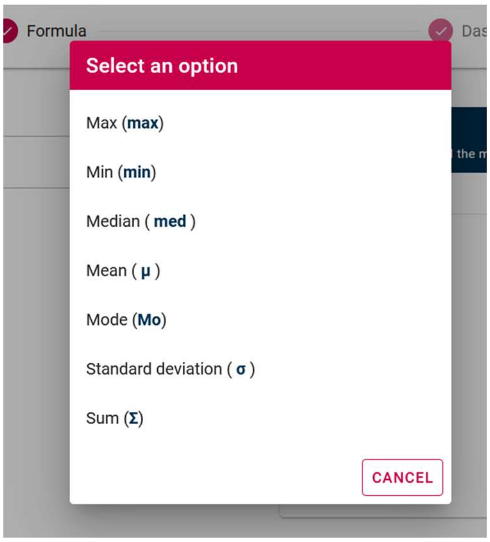
1. **Drag and Drop a Measure:**
   - On the "Formula" step, you will see a list of available measures on the right-hand side under the "KPI/Measures" section.

- To add a measure to your formula, **click and drag** the measure's name and **drop it** into the "KPI Formula" field on the left.



2. **Selecting an Operation:**

- Once you drop the measure into the formula field, a drop-down menu will automatically appear, allowing you to select an operation to apply to the measure.

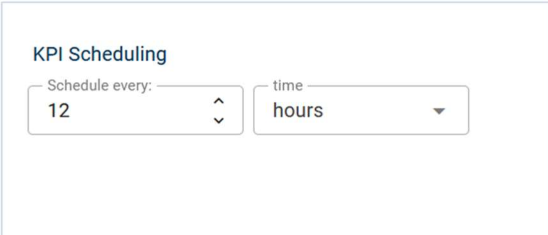


- Available operations include:
  - **Max (max):** Maximum value.
  - **Min (min):** Minimum value.
  - **Median (med):** Median value.
  - **Mean (μ):** Average value.
  - **Mode (Mo):** Most frequent value.
  - **Standard Deviation (σ):** Measure of variability.

        - **Sum (Σ):** Total sum of the values.
    - Click on the desired operation to add it to the formula.

3. **Previewing the Formula:**
    - After constructing your formula, you can click the "PREVIEW" button to see a preview of how the formula will be applied.
    - The preview helps ensure that your formula is correct before moving on to the next step.

4. **KPI Scheduling:**
    - Below the formula field, you can set how often the KPI calculation should be updated by specifying the time interval (e.g., every 12 hours).



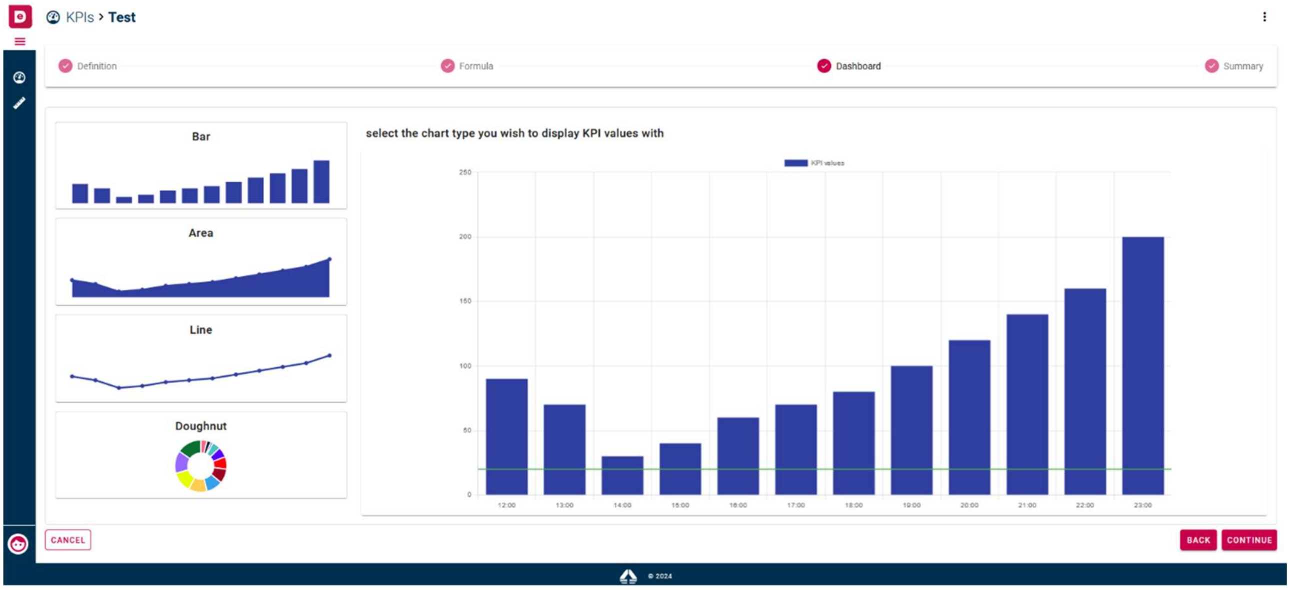
5. **Completing the Formula Step:**
    - Ensure that the formula field contains at least one measure and an associated operation.
    - Once the formula is correctly configured, you can proceed to the next step by clicking on "NEXT" or proceed to customize the dashboard.

Important Notes

- **Formula Validation:**
    - The system requires at least one measure to be added to the formula for it to be valid. If the formula field is empty or incomplete, you will not be able to proceed to the next step.
- **Multiple Operations:**
    - You can drag and drop additional measures into the formula field and apply different operations, allowing for complex KPI calculations.
- **Error Checking:**
    - If there is an issue with the formula, such as a missing measure or operation, the interface will display a warning, prompting you to correct the formula before proceeding.

These steps ensure that your KPI is calculated correctly based on the data available, allowing for accurate and meaningful performance tracking. Once satisfied with the formula, you can continue to the dashboard customization to visualize the KPI data effectively.

Selecting KPI's dashboard



The dashboard section allows you to select the type of chart that best suits the data and provides an effective visual summary of the KPI's performance. Here's how to select the dashboard for your KPI:

1. Choosing a Chart Type:

- In the "Dashboard" step, you are presented with several chart options on the left side of the screen. The available chart types include:
  - **Bar:** A bar chart is ideal for comparing values across different time periods or categories.
  - **Area:** An area chart emphasizes the magnitude of change over time, showing cumulative totals.
  - **Line:** A line chart is useful for tracking changes over intervals of time, especially for trends.
  - **Doughnut:** A doughnut chart (similar to a pie chart) is suitable for showing proportions or percentages among categories.

2. Previewing the Chart:

- After selecting a chart type, a preview of the chart will appear on the right side of the screen. This preview shows how your KPI data will be displayed in the chosen format.
- The chart will automatically populate with the data calculated based on your formula, allowing you to see real-time changes as you switch between different chart types.

3. Adjusting and Finalizing the Chart:

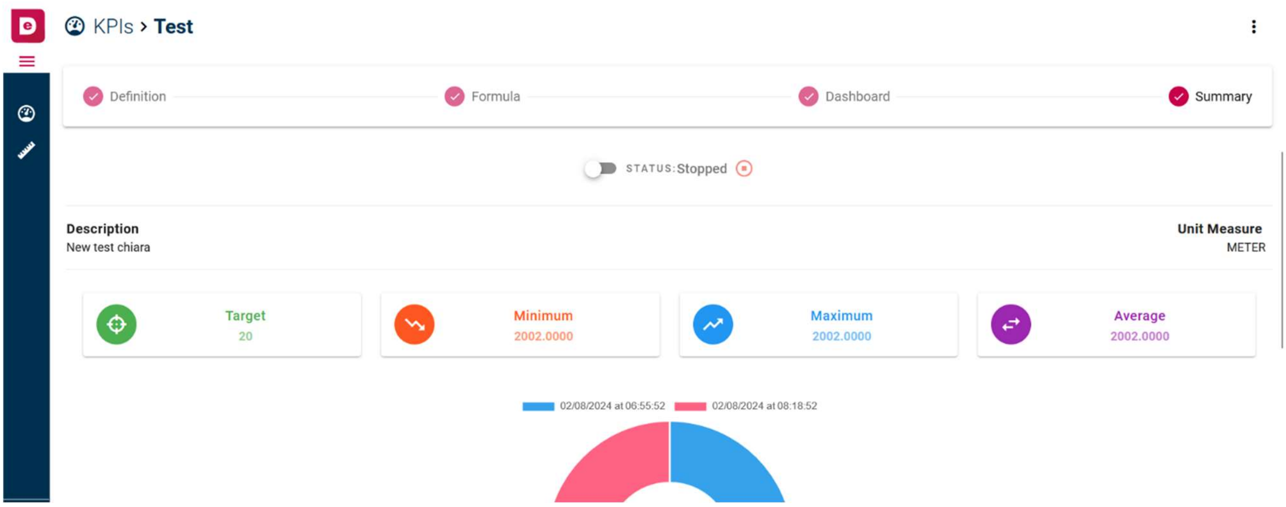
- Review the chart in the preview to ensure it accurately represents your KPI data.
- If necessary, you can go back and modify the formula or the data inputs if the chart doesn't meet your needs.
- Once satisfied with the visual representation, click "CONTINUE" to proceed to the final step.

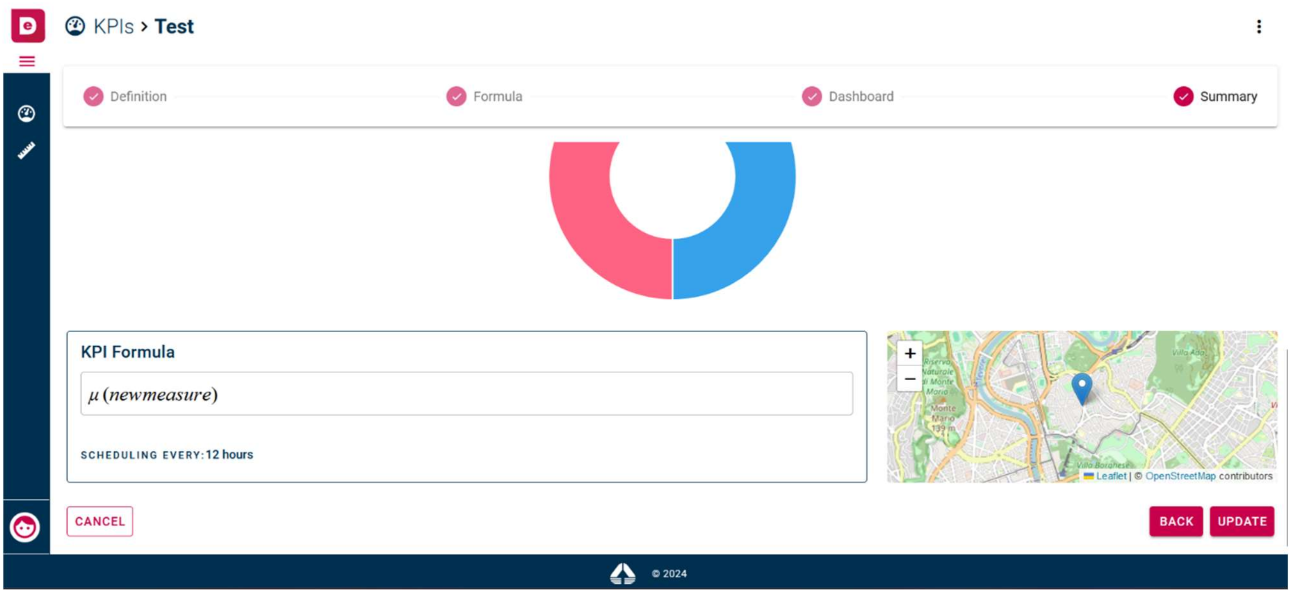
4. Proceeding to the Summary:

- After finalizing the chart selection, clicking "CONTINUE" will take you to the "Summary" section where you can review all settings before saving the KPI.

Selecting the right dashboard visualization ensures that your KPI is effectively communicated to stakeholders, making the data both accessible and actionable.

KPI’s Summary





This section allows you to review all the details of your KPI before saving or updating it. Here’s how to navigate and utilize the Summary section:

1. Reviewing KPI Details:

- The **Summary** section displays all the information you have entered in the previous steps:
  - **KPI Formula:** Shows the formula you have set up for calculating the KPI.
  - **Scheduling:** Confirms the frequency at which the KPI will be updated.

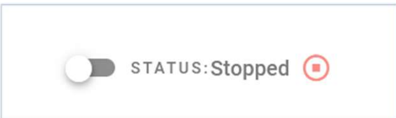
- **Dashboard Visualization:** Displays a preview of the chart type you selected in the Dashboard step.
- **Location (if applicable):** Shows the map with the selected location, if any.

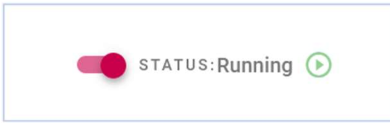
2. Visual Indicators:

- The Summary page also includes key performance indicators like:
  - **Target Value:** The goal you have set for the KPI.
  - **Minimum Value:** The lowest recorded value.
  - **Maximum Value:** The highest recorded value.
  - **Average Value:** The mean value of the KPI data over time.
- These indicators help you quickly assess the overall setup and expected performance metrics.

3. Status Toggle:

- At the top of the Summary section, there is a **Status** toggle that indicates whether the KPI is currently active or stopped.





- Ensure that the KPI status is set to active if you want it to start collecting and displaying data immediately after saving.

4. Final Adjustments:

- If you notice any errors or if something needs to be adjusted, you can go back to the relevant section (Definition, Formula, or Dashboard) using the navigation tabs at the top.

5. Saving the KPI:

- Once you are satisfied with the setup, click the **"UPDATE"** or **"SAVE"** button to save the KPI. This will apply all settings and start the KPI monitoring process according to the specified schedule.

6. Cancelling:

- If you decide not to save the KPI or want to discard all changes, click the **"CANCEL"** button. This will exit the KPI creation process without saving any of the changes made.

Important Notes:

- **Status Monitoring:** After saving, you can always return to the KPI dashboard to monitor its status and make further adjustments if needed.
- **Empty data collection:** If there are no data collected for a KPI, a notification message will appear on the screen indicating that the KPI is currently empty. This message will inform you that the data shown on the page are for demonstration purposes only.

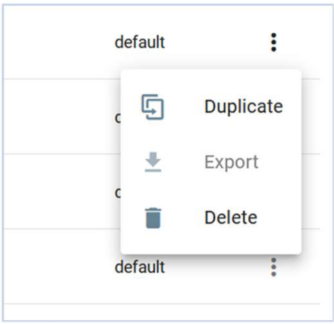
Managing KPIs

Viewing and Editing KPIs:

- From the KPI list, click on any KPI to view or edit its details.
- You can modify the formula, dashboard appearance, and summary from this view.

Duplicating, Exporting, and Deleting KPIs:

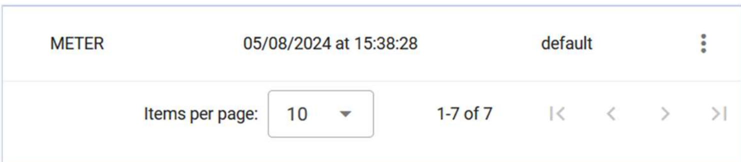
- Use the three-dot menu next to each KPI for options:
  - **Duplicate:** Creates a copy of the KPI.
  - **Export:** Download the KPI data.
  - **Delete:** Permanently removes the KPI.



Customizing Views

Items Per Page:

- Adjust the number of KPIs shown per page using the dropdown menu at the bottom of the KPI list.



Saving and Exporting

Exporting KPIs:

- Use the export function to download the KPI data in a compatible format for reporting or further analysis.

Automatic Updates:

- KPI values are updated according to the schedule defined in the formula section, ensuring real-time data availability.

Additional Features

Search Functionality:

- Located at the top of the KPI list, the search bar allows you to quickly find specific KPIs by name or description.

Status Indicators:

- KPIs display a status indicator showing whether they are active or stopped.

This concludes the user guide for the DE KPI Manager. With this information, you should be able to efficiently manage your KPIs, customize views, and understand the detailed functionality of the software. If you have any questions or require further assistance, please refer to the help section or contact support.