# KPI Dashboard in Power Apps – Walkthrough Guide

This guide explains how to take the mock KPI data (Excel file provided) and implement it step by step in Power Apps.

## 1. Data Setup

* Save **Ardent\_KPI\_MockData.xlsx** into **OneDrive for Business** or **SharePoint**.
* The file has 5 tables: Periods, Pillars, Objectives, KPIs, and KPIValues.
* Each table is related by IDs:
  + Pillars → Objectives → KPIs → KPIValues (by Period).

## 2. Load Data into Power Apps

1. Open Power Apps → **Create → Canvas app** (Tablet or Phone).
2. Go to **Data** (left panel) → Add data → Excel → OneDrive for Business.
3. Select **Ardent\_KPI\_MockData.xlsx**, check all 5 tables.

## 3. App Initialization (OnStart)

Paste this in **App → OnStart**:

// Load Excel tables into collections  
ClearCollect(Periods, 'Periods');  
ClearCollect(Pillars, 'Pillars');  
ClearCollect(Objectives, 'Objectives');  
ClearCollect(KPIs, 'KPIs');  
ClearCollect(KPIValues, 'KPIValues');  
  
// Default selections  
Set(varSelectedPeriod, First(Filter(Periods, IsActive = true)));  
Set(varSelectedPillar, First(SortByColumns(Pillars, "Order", Ascending)));  
Set(varSelectedObjective, First(Filter(Objectives, PillarID = varSelectedPillar.PillarID)));  
Set(varSelectedKPI, First(Filter(KPIs, ObjectiveID = varSelectedObjective.ObjectiveID)));

Click **Run OnStart**.

## 4. Period Selection (Dropdown)

* Insert **Dropdown** → Items:

SortByColumns(Periods, "StartDate", Descending)

* Display field: Label
* OnChange:

Set(varSelectedPeriod, Self.Selected)

## 5. Pillars Gallery

* Insert **Vertical Gallery** → Items:

SortByColumns(Pillars, "Order", Ascending)

* OnSelect:

Set(varSelectedPillar, ThisItem);  
Set(varSelectedObjective, First(Filter(Objectives, PillarID = ThisItem.PillarID)));  
Set(varSelectedKPI, First(Filter(KPIs, ObjectiveID = varSelectedObjective.ObjectiveID)));

## 6. Objectives Gallery

* Insert **Vertical Gallery** → Items:

Filter(Objectives, PillarID = varSelectedPillar.PillarID)

* OnSelect:

Set(varSelectedObjective, ThisItem);  
Set(varSelectedKPI, First(Filter(KPIs, ObjectiveID = ThisItem.ObjectiveID)));

## 7. KPI Gallery

* Insert **Vertical Gallery** → Items:

Filter(KPIs, ObjectiveID = varSelectedObjective.ObjectiveID)

* KPI row shows:

ThisItem.KpiName

* Target label:

"Target: " & Text(ThisItem.Target) & " " & ThisItem.Unit

* Actual label:

With(  
 { rec: LookUp(KPIValues, KpiID = ThisItem.KpiID && PeriodID = varSelectedPeriod.PeriodID) },  
 "Actual: " & If(IsBlank(rec), "—", Text(rec.Actual) & " " & ThisItem.Unit)  
)

* Status chip:

With(  
 { rec: LookUp(KPIValues, KpiID = ThisItem.KpiID && PeriodID = varSelectedPeriod.PeriodID) },  
 Coalesce(rec.Status, "No Status")  
)

## 8. KPI Detail Form

* Insert **Edit Form** (DataSource = KPIValues).
* Item:

Coalesce(  
 LookUp(KPIValues, KpiID = varSelectedKPI.KpiID && PeriodID = varSelectedPeriod.PeriodID),  
 Defaults(KPIValues)  
)

* Include fields: Actual, Status, Notes.
* Hidden fields → Defaults:
  + KpiID = varSelectedKPI.KpiID
  + PeriodID = varSelectedPeriod.PeriodID
  + LastUpdatedBy = User().FullName
  + LastUpdatedAt = Now()

Add **Save** button:

SubmitForm(frmKPI);  
Notify("KPI saved", NotificationType.Success);  
Refresh(KPIValues);

## 9. Optional Enhancements

* **Auto Status logic** → derive based on Actual vs Target.
* **Conditional formatting** → Red/Amber/Green status colors.
* **Scorecards** → KPI counts per status.
* **Charts** → Trend by Period.

## 10. Benefits

✅ Managers can filter by Period → Pillar → Objective → KPI.  
✅ Easy drill-down and updates in real time.  
✅ Centralized tracking aligned with Ardent’s strategic priorities.  
✅ Scalable: can integrate with curated Silver/Gold datasets later.

**Next Step:** Import the Excel, wire up the screens, then demo by walking through an example Pillar → Objective → KPI update.

**Deliverable 1: Talking Script (What to Say in the Meeting)**

**Step 1: Acknowledge the Foundation**

* “These slides already give us the **strategic alignment**: four pillars, clear objectives, and defined KPIs for Q3.”
* “The problem is they are **static** and don’t allow managers to interact with or update their progress easily.”

**Step 2: Explain What We’re Building**

* “I’m turning this framework into a **dynamic Power Apps dashboard**.”
* “In Power Apps, I’ve created collections for **Periods, Pillars, Objectives, and KPIs** so we can drill down from a high-level view into specifics.”
* “This means leaders can select a **Period → Pillar → Objective → KPI** and instantly see progress.”

**Step 3: Show the Value**

* “Instead of manually updating slides, leaders will have:
  + **Alignment**: every KPI is tied back to pillars/objectives.
  + **Transparency**: they can filter and drill down by quarter or team.
  + **Scalability**: we can later connect to curated datasets (Silver/Gold) for automated reporting.”

**Step 4: Demonstrate**

* Open Power Apps and show a **sample flow**:
  1. Select FY2025 Q3.
  2. Select “People First.”
  3. See objectives (Empowerment, Collaboration, Celebration).
  4. Open KPIs (Cherish/Replenish usage).

**Step 5: Close**

* “This dashboard will help us **move from static reporting → to interactive governance tracking**, aligned with Ardent’s priorities.”

**Speech to Practice with Manager**

“Our foundation is the management framework: the four Ardent pillars — People First, Value Driven, Consumer Centered, and Growth Minded.  
Each pillar has clear objectives, and each objective has KPIs we want to track. Right now, these KPIs live in static slides and spreadsheets. That makes them hard to filter, update, or drill down into.

The concept of the dashboard is to take this same hierarchy — **Period → Pillar → Objective → KPI** — and put it into Power Apps so leaders can interact with it.

For example, a leader could select the reporting period, then the pillar they care about, then see the linked objectives and the KPIs underneath. That way, they can instantly see progress without waiting for static updates.

This creates three key benefits:

* **Alignment**: Every KPI is tied directly to management’s pillars and objectives.
* **Transparency**: Leaders can view or update progress in real time.
* **Scalability**: Today it can be manual entry, but later we can plug in curated Silver/Gold datasets to automate reporting.

So, the dashboard isn’t about inventing new KPIs — it’s about turning management’s framework into an **interactive governance tool**.”

**📊 Excel Tables Explanation**

You’ll show him the Excel file with **four main tables** (Periods, Pillars, Objectives, KPIs + KPIValues).  
Here’s how to explain them clearly:

**1. Periods**

* Defines the **reporting cycle** (e.g., FY2025 Q3, Q4).
* Needed so managers can filter and compare progress by quarter or year.

**2. Pillars**

* These are the **strategic categories** defined by management (People First, Value Driven, etc.).
* They are the **highest level of grouping**.

**3. Objectives**

* Each pillar has one or more objectives (e.g., Empowerment, Collaboration under People First).
* Objectives are the **goals that break the pillars into focus areas**.

**4. KPIs**

* Each objective has measurable KPIs (e.g., % leaders using Cherish, Provider Data Model delivered).
* These are the **metrics managers will track progress against**.

**5. KPIValues (Support Table)**

* Stores the actual numbers, statuses, and notes for each KPI **per Period**.
* This is what makes the dashboard dynamic — it separates the **definition of KPIs** from the **progress data**.

**🔗 How They Connect (Hierarchy)**

* **Periods** → show which quarter/year we are in.
* **Pillars** → strategic themes.
* **Objectives** → goals within a pillar.
* **KPIs** → measurable indicators for each objective.
* **KPIValues** → actual progress (Target vs Actual) for a KPI in a given Period.

👉 In Power Apps, this creates the navigation flow: **Period → Pillar → Objective → KPI → Progress Value**.

Une image contenant capture d’écran, cercle, diagramme, ligne

Le contenu généré par l’IA peut être incorrect.

**KPI Dashboard Concept – Summary**

**Objective**

To move from static KPI reporting (slides and spreadsheets) to an interactive Power Apps dashboard that mirrors management’s strategic framework (Pillars → Objectives → KPIs). This ensures alignment, transparency, and scalability in performance tracking.

**Current State vs Future State**

• Current: Static slides/Excel, manual updates, no drill-down, limited visibility.

• Future: Interactive Power Apps dashboard with drill-down (Period → Pillar → Objective → KPI), editable forms, real-time progress visibility.

**Excel Data Model (Why These Tables)**

1. Periods – Defines reporting cycle (FY2025 Q3, Q4, etc.)

2. Pillars – Strategic categories defined by management (People First, Value Driven, etc.)

3. Objectives – Goals within each pillar (e.g., Empowerment, Collaboration).

4. KPIs – Measurable indicators tied to objectives.

5. KPIValues – Stores actual progress, status, and notes for each KPI per Period.

**Hierarchy Flow**

The relationships between tables:  
• Periods → KPIValues (time-based reporting)  
• Pillars → Objectives → KPIs → KPIValues (strategic drill-down)  
This hierarchy allows managers to navigate step by step from a high-level strategy to measurable progress.

**Example User Flow**

1. Select reporting Period → FY2025 Q3  
2. Choose Pillar → People First  
3. See related Objectives → Empowerment, Collaboration, Celebration  
4. View KPIs → % Leaders using Cherish, Replenish Pilot Completion

**Benefits**

• Strategic alignment: KPIs tied directly to management’s pillars & objectives.

• Transparency: real-time visibility and updates.

• Efficiency: less manual reporting, more focus on insights.

• Scalability: ready for integration with curated Silver/Gold datasets.