Quick Start Card BI Office Create a KPI

In BI Office Data Discovery, users can build **KPIs** which are custom calculations that display a value, status, or a target. Users can then set security and share them in reports inside of dashboards or publications.

Open the Model



From the **Advanced Calculation Designer**, click the **Custom KPI** button. Then click **OK**.



Design the KPI Display

Decide what the KPI will **display** and how it will **look**.

On the KPI Status tab, Choose the KPI and	KPI Status Actual Value Targ	Advanced Calculation Designer	
Gauge Style	KPI Style	Lights Radial fx Ratio # <tr< td=""><td>Pick the KPI visualization</td></tr<>	Pick the KPI visualization
Select the type of	Gauges Style		Pick the Gauge visualizatic
Formulation, Format	Formulation		Choose how the status wil
String calculation	Format String		Formatting for the status
type, and the KPI	KPI Model		Select the way a status wi
Model status type.	Range Bands		the direction

Set the color of the **Range Bands** for thresholds that coorelate with red, yellow, and green status indicators.

Edit the KPI Values

*	Ad	vanced Calculation Desi	gner
KPI Status Actual Value Targe	fx Numeric Fx (-) Sets	Variables Members	7 8 9 4 5 6 1 2 3 0 % . AND (
hierarchies. Where not selected, th prevailing cell context will be applie	e default value from each hierard d		Format String:
Hierarchy	T Elements	5	Foreground
Measures () Email (Customer)			Background
	KPI Status Actual Value Targe Data Point Control Control Con	KPI Status Actual Value Target Value Impata Point Impata Point Impata Point Impata Poin	KPI Status Actual Value Target Value Important Ørander Status Ørander Status Important Ørander Status

Click **Data Points**, navigate to the **Measures** hierarchy, then click the **elipsis** button. Under the the appropriate folder, select the desired **measure**.





To pull the current time period, navigate to the desired **dimension** and click on the elipsis button and select **Current Member** then click **Select**.

- Maath Datas (Data)	
A Month Dates (Date)	
¢	×
All Dates	<u></u>
🖌 💼 Functional Selections	
Current Member	
Previous Member	
Next Member	
Parent	
First Child	
Last Child	- 11
First Sibling	
Last Sibling	
Lag Members (Backwards)	
Lead Members (Forwards)	-
Select Deselect All	Cancel

Set the Format String type.

Currency	•
	Currency

On the **Target Value** tab, set up the Data Points and Format String type the same as the **Actual Value**. Except under the selected dimension, slect **Previous Member**.



Name the KPI, choose to publish to a **Private** or **Public** folder, **NOTE*** once saved to Private, it cannot be moved to Public later. Click **OK**.

Name	Sales Growth Rate
Descripti	on
_	
	Access: Public 👻
	Cumulative

Set Security

Set Role Security and choose who can **Read** or **Edit** the KPI. Click **OK**.

•		Custom Member Security	×
public and pr be edited by	ivate content the definition	titions are available to all users with read access for inclus Private definitions can also be included in a public conten owner. Users with write access to public definitions can ch then affect all related content.	t, but can only
		Sales Growth Rate	
Custom I	vlember S	ecurity	
Read	🗌 Write	Roles *	
Read	Write	Roles A Technical Product Ma	
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Select the KPI

Select the new KPI from the selection panel. Under the **Elements** pane, navigate to the **Custom Elements** folder and select the **KPI**.



Test

Change the Report Type to include the KPI gauges. From the main **Ribbon**, click on the **Home** tab, then the **Report Layout** button, and choose the desired style.



Change the Report Style

Select **Grid** for the left panel and **Gauge** for the right.



See the **KPI** gagues appear.





