Handbook

1. System Requirement

Microsoft Excel Versions Supported 2003-2007-2010

To use the model you must set the macro security level on the level "low" through the following procedure:

Tools --> Macro --> Security --> Security Level --> Low

The model automatically adapts to screen size.

The model manages (full version) a maximum of 5 years of measures.

2. X KPI Purpose and Basic Contents

X KPI born with the objective of enabling a structured management performance indicators through a streamlined collection and organization of information and a performance verification both with respect to periods prior to that target set.

Map of indicators is build basing on the following plan:

Perspectives constitute the highest level of classification of indicators (required)

(for example: financial, market, internal process, ….)

Categories represent subclassifications perspective (required)

(for example: in the market perspective is possible to detail category like: sales, customer acquisition, …)

Business Process represent a level of classification in according to internal business process (that lie in a plane parallel to the perspectives and categories) (optional)

Area Managers represent managers entrusted with the monitoring of the indicators and compliance targets (optional)

This icon (from anywhere) back to the menu

3. First year and frequency

The field "**first year**" in the model menu defines the year from which the measures are managed and the values entered.

The model provides for the management of five years of activity fractionated in a monthly periodicity.

Indicators with different frequency by month (eg quarterly) can be handled in two ways:

1. Recognition of competence within the month (leaving empty fields of two months not purchased)
2. Repeating the value found in the quarter for two months (in order to always have a value indicator)

4. Project Notes

This worksheet enables the writing of notes that can be detected during the construction project.

It constitutes a "notepad" on which to note the progress of the project and the steps to be taken.

5. Cleaning Fields

The action "clean fields" allow the template to clean the tables below reports to highlight in "drop-down lists" only the update and active values.
The procedure can be launched at user's discretion.

6. Perspectives

The creation and modification of pespectives is through typing in the "white" fields.
The modification of a previously entered description requires a new combination of related fields.

7. Categories

The creation and modification of categories is through typing the description in the column "description category" and associating the category to the perspective through the drop-down menu in the column headed "description perspective".
The modification of a previously entered description requires a new combination of related fields.

8. Area Managers

The creation and modification of pespectives is through typing in the "white" fields.
The modification of a previously entered description requires a new combination of related fields.

9. Business Process

The creation and modification of pespectives is through typing in the "white" fields.
The modification of a previously entered description requires a new combination of related fields.

10. KPIs

The creation of the indicators is done through compiling and selecting different options and informations.

a. Kpi Description
Write the name of the indicator in the "white" field.
b. Category Description
Choose the category to which belongs the indicator through the drop-down menu in the "Category Description"
The choice of the indicator category includes the directly association to the perspective
c. Business Process Description (optional)
Choose the process to which belongs the indicator through the drop-down menu in the "Business Process Description"
d. Number Format
Click through the drop-down menu, one of the possible formats
e. Band Type
Click through the drop-down menu, the indicator band type
The band type expresses the better indicator trend: for some KPIs an increasing is a good thing (for example Sales or Revenue have a positive band type, "+"), for other KPIs, such as Costs or Complaints, an increasing is a bad thing (these indicators have a negative band type, "-").
f. Frequency
Click through the drop-down menu, the indicator frequency
The choice has no impact on the model because the values are manually inserted into the chosen period
g. Time Frame
Click through the drop-down menu, the indicator time frame
Year to Date (if the data entered is a sequence, eg sales from 01.01 to 30.04)
At present (if the data entered is an present number, eg due to banks)
h. GrAtPresent
Choose whether, in the presence of a progress indicator, you want to see the values even monthly.
Example: sales are entered as a progressive beginning of the year and the model calculates the monthly values punctual
i. Area Manager (optional)
Click through the drop-down menu, the responsable of the performance indicator

through this icon you can open the detailed description and the setting of the indicator (only if you are placed on the indicator code)

11. Detail and setting indicator

In addition to information provided by the worksheet of creation indicators can further detail the characteristics of the indicator across the fields:

a. Indicators description

Detailed Description and Objective of the indicator

b. Calculation Formula

Calculation procedure that is followed for determining the value of the indicator

c. Data Source

Identify the source of the indicator value, where the data comes from (can be a file, ERP, statistics…)

d. Target Description

Calculation procedure that is followed for determining the goals of the indicator

e. Other information

Any other information related indicator

12. Actual Data

In the matrix indicators - periods are added the indicator values observed at that time.

Indicators with different frequency by month (eg quarterly) can be handled in two ways:

1. Recognition of competence within the month (leaving empty fields of two months not purchased)
2. Repeating the value found in the quarter for two months (in order to always have a value indicator)

13. Target Data

In the matrix indicators - periods are inserted target/goals values identified by the indicator at the time

Indicators with different frequency by month (eg quarterly) can be handled in two ways:

1. Recognition of competence within the month (leaving empty fields of two months not purchased)
2. Repeating the value found in the quarter for two months (in order to always have a value indicator)

14. Strategic Plan (full version)

For each year of management you can set a business plan through:

a. Strategic Plan

Description of the overall corporate strategic plan

b. Objectives

Description of specific objectives related to strategic management

c. Indicators

Association of specific indicators of achievement to each objective

d. Initiatives

Description of specific initiatives to be implemented to achieve each targets

Period:

The choice of the period of analysis will determine the achivement of objectives established in the strategic plan

15. Dashboard

The dashboard is a business tool that allows you to configure and build periodic reports of the indicators

The dashboard is updated automatically when opening

The construction and analysis of the details is through the set of buttons at the top right

Dashboard Print

Configuration of the scale of analysis and the periods

Graphic detail of the selected indicator

Detailed description and setting of the selected indicator

16. Graphic indicator

The graph indicator enables:

a. the navigability of the indicators

b. the choice of reporting period

c. analysis of the last 12 months

d. comparing the previous year and the target

e. short guideline for development performance

f. a graphical summary

Navigability and the recording period allowed by the indicator buttons

	Choise from a menu of indicators created
	Scroll buttons indicators
Period:	*Choise of the period of evaluation*

Other icons:

	Print Chart
	Detailed description and setting of the selected indicator
	Transition to the chart at present (if the indicator has time frame "year to date")

17. Settings and Scores Indicator

This worksheet combines the detailed information of the indicator with the values found in selected periods

The worksheet functions are the same as for graphic indicator