Introduction

This Quick guide will show you how to Add and edit a traffic light in the dashboard. The data that needs to be filled in is; name, KPI's and filter. In the end you have setup a traffic light in dashboard.

Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software.

The guide *may* contain important general notices. These will be marked with an exclamation icon.

Tips and tricks are marked with an Info-icon.

Questions & Answers note relevant to the topic at hand.

Dashboards & Reports

Traffic light & gauge

Introduction

1 Open Add Element

Open My dashboard in ribbon. A new tab opens.
Click Edit layout and choose Add Element.
A window opens. Click P&L.

This functions the same way in my dashboard as in shared dashboard and any report.

You should start experiment adding elements in My dashboard, and when you feel comfortable you can start setting up the Shared dashboard. In this way, the Shared dashboard will not be edited by several users.

2 Configure KPIs

You can display KPIs in two different ways:

- Gauges
- Traffic light

Traffic lights and gauges are build up by comparing two values. These values then become KPIs in the system.

The configuration of the two are identical. It is only the display that differs.

You can add several KPIs.

3 Placing elements

When you have added elements you need to figure out where to place the element on the dashboard.

The first element you add will automatically fill the working area.

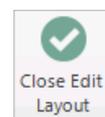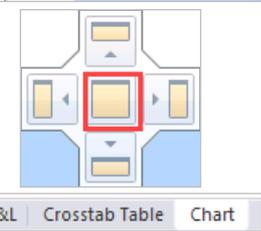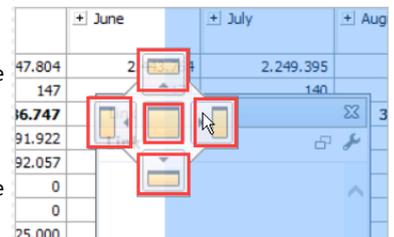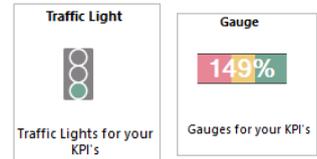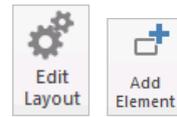The second will appear in a pop-up window next to the cursor on the screen.

Click the element to move it. A docking assistant appears on the screen where you can dock the element in the appropriate position.
Drag the element to one of the five docking areas (highlighted in red) to dock the window in the middle of the screen. Each docking area indicates the position of the element after it has been docked. The area in blue indicates where the element will be docked.

If you place the element in the middle docking area of an existing element (second picture), the window will be placed in another tab than the first one. This creates different tabs in the bottom of the first tab (third picture).

The docking area in the outer edges (fourth picture) of the tab places the element in the outer edges. If you place the element in the bottom of the tab, and then remove the first element, the second element will remain in the bottom of the tab.

4 Configure KPIs

Click Close edit layout in the ribbon to save your new layout.

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Configuration

Above you see the window that appears when you add a Gauge or Traffic light.

In KPI's you add your KPIs and configure the values to every KPI.

- KPI:
  Name: Enter the name of the gauge.
- Key figure:
  Value: Enter the units/P&L lines of the KPI.
  Scenario: Select the scenario you want.
  Stream: Select the stream you want.
  Year: Select the year the values of the KPI should be measured in.
  Month: Select the month the values of the KPI should be measured in.
  Filter: Click in the filter field to add a filter to the KPI.
  Fixed value:
- Compare to:
  Value: Enter the units/P&L lines of the KPI you want to compare the first KPI to.
  Scenario: Select the scenario you want.
  Stream: Select the stream you want.
  Year: Select the year the values of the KPI should be measured in.
  Month: Select the month the values of the KPI should be measured in.
  Filter: Click in the filter field to add a filter to the KPI.
  Fixed value:
- Thresholds:
  Low limit: Select the lowest limit for the threshold.
  High limit: Select the highest limit for the threshold.
  Color shema: Here you can select the order of the lights of either the traffic lights or the gauges.

Gauge specific:

- Scale:
  From: From percent.
  To: To percent.

Create a gauge

1 **Add KPI information**

Click Add to add KPIs to comparison in your gauge.
Now you can enter information into the different lines of KPI.

Here the following fields for comparison are filled out:

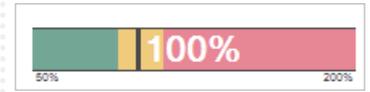- Value
- Scenario
- Stream
- Year

Additionally:

- Thresholds:
  - Low limit, High limit and Color schema
- Scale:
  - From and to

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KPI Name	Key Figure Value	Scenario	Stream	Year	Month	Filter	Fixed Value	Compare to Value	Scenario	Stream	Year	Month	Filter	Fixed Value	Thresholds Low limit	High limit	Color schema	Scale From	To
Search…																			
Consumer units	Actual (YTD) + ...	Total	Current year		No filter app...		Consumer units	Actual (YTD) ...	Total	Current year		No filter app...			90	110	Red-Yellow-...	50	200

In the picture above you can see the information we have entered in our example.

It will turn out to look like the picture to the right.

Create a traffic light

1 Add KPI information

Click Add to add KPIs to comparison in your gauge.
Now you can enter information into the different lines of KPI.

Here the following fields for comparison are filled out:
- Value: Net sales, Total promotion allowance and Sales margin.
- Scenario: Actual (YTD) + Forecast (YTG).
- Stream: Total.
- Year: Current year.

Additionally:
- Thresholds:
  - Low limit: 90
  - High limit: 110
  - Color schema: Red-yellow-green, Green-yellow-red and Red-yellow-green.

In the picture above you can see the information we have entered in our example.

It will turn out to look like the picture to the right.

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