KPI Charts

Planon Software Suite

Version: L105

Planon
Building Connections

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About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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KPI charts for customer contracts

KPI charts enable contract managers to visually assess a contract's performance via a gauge dashboard.

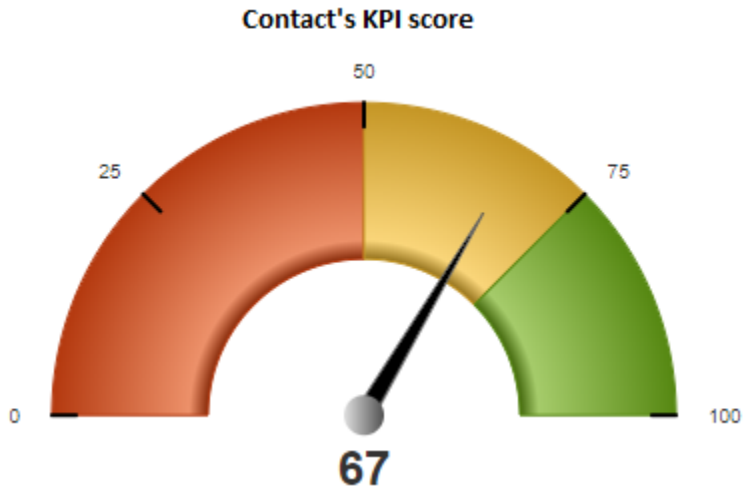
Concepts

The following topics describe the concepts that are key to understanding the functionality.

KPI charts

KPI is an acronym for *key performance indicator*. KPIs on orders (work orders or PPM orders) are used to measure the effectiveness of a service in achieving its objective.

A KPI chart is an angular gauge type in Self-Service Publisher that displays the KPI results based on contract threshold. It enables you to view and analyze the contract 'performance'. An example of KPI chart is given below:



In the above image, 0, 25, 50, 75 and 100 are threshold values. The KPI value is 67, in the yellow area. This represents a reasonable, but still insufficient performance of the contract.

Threshold

A **threshold** is a maximum or minimum value which is used as a benchmark to assess and review the current situation.

Working with KPI charts

This section explains the processes and tasks that can be configured in the **KPI charts** TSI.

- At **KPI chart groups** you define the chart groups that link to contracts.
- At **Contract KPI thresholds** you define threshold values for each contract in a KPI group.

Adding KPI chart groups

In Supporting data > KPI charts, you can create a KPI group and link it to multiple contracts. You can specify different threshold values per contract (for the same criteria).

Procedure

1. Go to KPI chart groups.
2. On the action panel, click Add.
3. On the data panel, enter a relevant Code and Name for the KPI chart.
4. Select the No. of thresholds that you want to define for the KPI chart group. You can define a maximum number of *4* thresholds.
5. Click Save.

   You have now created a KPI chart group.

   You can link contract(s) to this group by clicking the **Link contract** option on the action panel. In the **Link contact** pop-up, move the contract(s) from **Available** to **In use** and click **OK**. The linked contract(s) will be displayed in the **Linked contracts** field in the data panel.

Proceed with Adding contract KPI thresholds.

Adding contract KPI thresholds

You can specify different threshold values for the various contracts within the same KPI group.

> If you have linked contracts on the **KPI chart groups** level, a contract KPI threshold is created automatically for each contract. However, you must still provide the required threshold values on the data panel.

Procedure

1. Go to KPI chart groups > Contract KPI thresholds.

2. On the action panel, click Add.
3. In the data panel, fill in the relevant fields. For description of these fields, see Contract KPI threshold fields.
4. Click Save.

You have now added threshold values for a contract in the KPI chart group.

Field descriptions

The following section(s) describe(s) the fields, their purpose and meaning.

Contract KPI threshold fields

Field	Description
Contract	Select a contract for which you want to define the threshold values.
Start of range	Enter a start range for the contract threshold. This will be the starting value of the KPI chart.
End of range	Enter a end range for the contract threshold. This will be the end value of the KPI chart.
KPI chart group	Select the KPI chart group from the list.
Threshold limit 1-4	Enter number(s) to indicate the threshold values of the KPI chart. These values will be plotted between the start and end range of the KPI chart. Depending on the number selected in **No. of thresholds** field in KPI chart groups, these fields will become available.

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