

Create and publish Key Performance Indicators (KPIs)

[+ Show All](#)

A Key Performance Indicator (KPI) is a visual cue that communicates the amount of progress made toward a goal. This article explains how to create KPIs by using Microsoft Office SharePoint Server 2007 KPI lists and how to display KPIs on Web pages.

In this article

- [Using Office SharePoint Server 2007 KPIs](#)
 - [Create a KPI list](#)
 - [Add a KPI to the KPI list](#)
 - [Add a Web Part to a page](#)
 - [Link the KPI list to the Web Part](#)
-

Using Office SharePoint Server 2007 KPIs

Key Performance Indicators are valuable for teams, managers, and businesses to evaluate quickly the progress made against measurable goals. By using SharePoint KPIs, you can easily visualize answers to the following questions:

- What am I ahead or behind on?
- How far ahead or behind am I?
- What is the minimum I have completed?

To create and publish KPIs in Office SharePoint Server 2007, you must follow four procedures: create a KPI list, add the KPI to the list, add a [Web Part](#) to a Web page, and link the KPI list to the Web Part.

Before you begin, you may want to choose one of the following KPI types:

KPI types

- **Using data in SharePoint lists** When SharePoint lists contain items that you can count, items that are part of a workflow, or items that contain dates, you can use a KPI to track how long the issues or tasks have been open, how many are open, and what percentage of a task is complete. You can also keep track of totals, such as the amount of time that an issue has been open or the total number of sales in a region.
- **Using data in Microsoft Office Excel workbooks** You can set up a KPI in an Excel workbook and link to the KPI from Office SharePoint Server 2007. As the data in the workbook changes, the KPI is automatically updated. You can choose to have the workbook displayed on the same Web page by using the Excel Web Renderer (EWR).
- **Using data from Microsoft SQL Server 2005 Analysis Services** Office SharePoint Server 2007 can use KPIs from Analysis Services, a component of Microsoft SQL Server 2005. A systems administrator or database analyst usually sets up these KPIs and registers the data connection with Office SharePoint Server. Then, anyone with the appropriate permissions can access the database and link to the Analysis Services KPIs.
- **Using manually entered information** In situations where there is no formal system set up or you have a one-time project to track, you can use this KPI and enter the criteria manually. This KPI is useful for displaying information that is communicated in e-mail or some other nonstructured system.

 [Top of Page](#)

Create a KPI list

To create a KPI, you first create a KPI list to which you add one or more KPIs. You can create KPI lists in the Reports Library of the Reports Center in a team or organization site, so that other people easily can find them. For more information on the Report Center, see [Introduction to Business Intelligence features](#).

1. In the site where you want to create the KPI list, on the default page of the Report Center, click **Site Actions**, and then select **View All Site Content**. Under the **All Site Content** heading, click **Create**.
2. On the **Create** page, under **Custom Lists**, click **KPI List**.
3. Type a name and an optional description for the KPI list.
4. Click **OK**.

You now have a KPI list to which you can add one or more KPI types.

 [Top of Page](#)

Add a KPI to the KPI list

1. On the KPI list toolbar, click the arrow next to **New**.
2. Select one of the following KPI types, depending on where the data for the KPI resides.

Select this option

When the source data is

Indicator using data in SharePoint list

A SharePoint list that contains items from which you want to create an aggregate value, such as a sum, minimum, or maximum. Before you set up the KPI, make sure the SharePoint list already is in the view that you want to use. You must first display the appropriate columns in order for the KPI to work.

Indicator using data in Excel workbook

An Excel workbook where the KPI is calculated in the workbook.

Indicator using data in SQL Server 2005 Analysis Services

A SQL Server 2005 Analysis Services cube.

Indicator using manually entered information

Information that is not in a system and therefore entered manually.

3. On the **New Indicator** page, do one of the following, depending on the type of KPI you chose in step 2.

For this KPI

Do this

1. In the **Name** and **Description** boxes, type a name and optional description for the indicator.
2. In the **Comments** box, type text to help people who are viewing the KPI understand what it represents.
3. Under **SharePoint List and View**, in the **List URL** box, enter the URL of the list or library.

Notes

- If you don't know the URL for the .odc file, click **Browse** to open the **Select a Link** dialog box, and then navigate to the .odc file.
- The SharePoint list or library must be in the same [site collection](#).

Indicator using data in SharePoint list

4. In **View**, select the view that contains the items you want to use in the KPI.
5. Under **Value Calculation**, select one of the following ways

to calculate the goal of the KPI:


- **Number of list items** A count of the total number of items in the list.
- **Percentage of list items where** A calculation that compares the value of a content type within a column or up to five columns in the list.
- **Calculation using all list items in the view** A computation of **Total**, **Average**, **Maximum**, or **Minimum** of a numerical column in the list.

Note The **Calculation using all list items in the view** option is only available if your list includes a numerical field.

1. In the **Name** and **Description** boxes, type a name and optional description for the indicator.
2. In the **Comments** box, type text to help people who are viewing the KPI understand what it represents.
3. In the **Workbook URL** box, enter the location of the workbook.

Notes

Indicator using data in Excel workbook

- If you don't know the workbook URL, click  to open the **Select a Link** dialog box, and then navigate to the file.
 - The URL must be relative to the current site.
4. In **Cell Address for Indicator Value**, type the workbook number followed by an exclamation point and then the cell address of the location in the worksheet for the KPI. For example, if the indicator is in cell D15 on worksheet 1, type **Sheet1!D15**. Otherwise, use a named range.

1. In the **Data Connection** box, enter the URL where the Microsoft Office data connection (.odc) file is located.

Note If you don't know the URL for the .odc file, click **Browse** to open the **Select a Link** dialog box, and then navigate to the .odc file.

Indicator using data SQL Server 2005 in Analysis Services

2. In the **Only display KPIs from display folder** box, select the display folder in the Analysis Services database that contains the KPI.
3. In the **KPI List** box, select the KPI you want, such as **Total Revenue** or **Average Profit Margin**.
4. Select the **Include child indicators** check box to display all of the child indicators for the selected KPI.
5. In the **Name** and **Description** boxes, type a name and optional description for the indicator.
6. In the **Comments** box, type text to help people who are viewing the KPI understand what it represents.

Indicator using manually entered information

- In the **Name** and **Description** boxes, type a name and optional description for the indicator.
- In the **Comments** box, type text to help people who are viewing the KPI understand what it represents.
- Type the numerical value of your progress so far.

4. In the **Status Icon** section, under **Status Icon Rules**, in the **Better values are** list, select **higher** or **lower** to indicate which range of numbers will be green.
5. Type the values for the status indicators in the boxes. For example, to track the minimum percentage complete for a set of tasks, you can set the green indicator at the goal value and the warning value to be one less than the goal value. In that case, if you want to see when the minimum percentage complete drops below 25 percent, you set the green indicator to 25 and the yellow indicator to 24.

Note The **Status Icon Rules** for an **Indicator using data in Analysis Services** KPI are preset by the database analyst.

After you add all of the KPIs that you want to the KPI list, you can publish them on a Web page by using one of two KPI Web Parts.

 [Top of Page](#)

Publish the KPI on a Web page

After you add one or more KPI types to the KPI list, you can display the KPI list on My Site, a team site, or any other SharePoint page. In addition, the KPI list is available for use by anyone in your organization who has permissions to access it. You can use one or all of the KPIs that appear on the list.


To display the KPIs, you edit the Web page where you want to display the KPI list and add a KPI Web Part. To display the entire KPI list, use the KPI List Web Part. To show only one of the KPIs from the list, use the KPI Details Web Part.

Add a Web Part to a page

1. On the page where you want to add the KPI, click **Site Actions**, and then select **Edit Page**.
2. In the zone in which you want to add the KPI, click **Add a Web Part**.
3. In the **Add Web Parts** dialog box, in the **All Web Parts** section, under **Dashboard**, do one of the following.
 - To insert the entire KPI list, select **Key Performance Indicators**.
 - To choose one KPI from the KPI list, select **KPI Details**.
4. Click **Add**.

 [Top of Page](#)

Link the KPI list to the Web Part

1. In the Web Part, click **Open the tool pane**.
2. In the tool pane, under **Indicator List**, click  to navigate to and double-click the KPI list that you created in the previous set of procedures. The list may be in the Report Center of the site.
3. Select one of the KPIs in the list. (If you selected the **KPI List**, the entire list is displayed.)
4. Click **OK**.

 [Top of Page](#)