

KPI

The KPI visualization can show one or two measure values, and is used to track performance. A KPI visualization with two measure values, using conditional colors and symbols.

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When to use it

Use KPIs to get an overview of performance values that are central to an organization. Use color coding and symbols to indicate how the figures relate to the expected results.

Advantages

KPIs give a quick understanding of the performance within an area.

Disadvantages

The KPI is somewhat limited when it comes to graphical components. You can use symbols to help illustrate the performance, but if you want a more conspicuous component, consider using a gauge.

Creating a KPI

You can create a KPI visualization on the sheet you are editing.

Do the following:

1. From the assets panel, drag an empty KPI chart to the sheet.
2. Click Add measure and select a measure or create a measure from a field.

In a KPI visualization, you can have one or two measures and no dimensions. With two measures, the second value automatically becomes a complementary value and is shown with a smaller font size. You can easily switch their order by dragging the measures in the properties panel under Measures.

When you have created the KPI visualization, you may want to adjust its appearance and other settings in the properties panel.

The following settings are used by default in a KPI visualization:

- Centered alignment.
- Black text color.
- Medium font size.
- No titles.
- Measure label displayed.
- Conditional colors and symbols are turned off.
- No link to sheet.

Tip: If you double-click or drag a measure from the assets panel, a KPI visualization is added on the sheet using the measure.

Using conditional colors and symbols

When you use conditional colors for your KPI visualization, you have the option to use symbols to be displayed next to your measure value. Additionally, you can use the following options:

- Set range limits.
- Add limits to create subsections with different colors to indicate performance, for example, good (green), below expectations (yellow), or critical (red).
- Add symbols to the values.
- Use gradient coloring between color sections.

You can use expressions to set the limits. All these settings are done in the properties panel that is displayed on the right-hand side of the window when editing a sheet.

Linking to another sheet

You can link from the KPI visualization to a sheet in the app. When making data analysis and clicking the visualization, you can click a second time to go to a predefined sheet. The sheet is opened in a new tab. When hovering over], the name of the sheet is displayed. The icon is only displayed when Show title is selected, under Presentation.