

## KPIs import template Rules and Sample

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A downloadable PDF version is available at the bottom of the page together with the Excel import template.

**Rules.** (Required fields are marked with a Red background colour)

Field Name	Description	Rules	Exception Handling	Values to be placed	Default Values	Mandatory (Y / N)	Field Type
Code	This is a code that will be generated and used to tie up the KPI to the KPI Tracking information.	30 characters for codes, alphanumeric. Codes can be alphanumeric. 30 characters with a hyphen. That is all.	The KPI must have a name. If the name is not captured during import the KPI will not be imported.	This will be determined by the users and the codes they associate with the KPI. All codes will be unique.	The system will default to the first entry within the lookup.	Y	Variable Character (30)
Name	This is a description of the field.	Can contain alphanumeric characters	The KPI must have a name. If the name is not captured during import the KPI will not be imported.	N/A	N/A	Y	Variable Character (200)
Description	This is a description of the KPI within the repository.	Can contain alphanumeric characters	The description for the KPI does not have to be captured for import to occur.	N/A	N/A	N	Variable Character (1000)
Baseline	This is the baseline value of the KPI.	Must be a figure, with two decimal places.	If the field captured does not meet the numeric values, the KPI can be imported.	Any numeric value.	0		Numeric
BaselineStart	Date the baseline tracking started for the KPI.	Calendar date, which states when the baseline tracking of the KPI started	A date must be selected. If a date is not selected then the date of the import will be selected as the default date.	Any date.	Date of import	N	Date time (YYYY-MM-DD)
BaselineEnd	Date the baseline tracking Ended for the KPI.	Calendar date, which states when the baseline tracking of the KPI started		Any date.	Date of import	N	Date time (YYYY-MM-DD)
UnitofMeasure	Must be a valid value from the Units on the system. (NB: <b>Displayed values will be affected by the specified display factor</b> )	The list will consist of the following units of measure: \$, \$ per month, %, \$/t, BCM, BCM/m, g per ton, g/t, hrs., hrs./day, kg per day, kg/t, km, Litres, litres/hr., Metres, Minutes, Number, Number/day, Oz/day, ppm, RL, t, t/day, t/hr., t/op hour.	A unit of measure must be selected. If not UoM is selected a default UoM of the \$ sign will be selected for the KPI.	This will be determined by the users and the codes they associate with the UoM. All codes will be unique.	N/A	Y	Variable Character
ExpectedTrend	This is an indication of the preferred trend of the KPI.	Users should indicate if the KPI is expected to move upwards or downwards.	If the expected trend is not selected a default trend of upwards will be selected.	Upwards Downwards	N/A	Y	Numeric
Allow Zeroes	This is the selection that determines whether the KPIs tracking data can contain a zero value.	If the checkbox is enabled (a 1), the information captured may contain a zero value for tracking information. If a 0 was selected, the KPI tracking data will not be allowed to contain a zero value.	This field will indicate whether KPI Tracking data can be a value of zero. If this field is not captured a default selection of Y will be chosen.	True False	TRUE	N	Checkbox (Y/N)
Current KPIs Layout: MeasurementType	This is an indicator that determines the measurement type of the KPI within the repository.	This value must be valid. The selected measurement type will determine how data entries are displayed.	The system will throw an error if no value has been entered.	Daily Values or Performance Rate Cumulative Daily Values Cumulative MTD Total Values Progressive MTD Values	TRUE	Y	Lookup (Measurement Type)
New KPIs layout: KpiValueCalculationMethod	On the is an indicator that determines the Value Calculation of the KPI within the repository.	This value must be valid. The selected KPI Value Calculation Method will determine how data entries are displayed.	The system will throw an error if no value has been entered.	Average. Last. Sum	TRUE	Y	

Department	This is an indication of the department the KPI will report on.	This value must exist. The department selected must match up with the departments saved on the system.	If there is a spelling mistake or the department selected on the import does not meet the departments saved on the system, the record will still be allowed to be imported onto the system. However, the department field will be empty.	This will be determined by the users and the codes they associate with the Department. All codes will be unique.	The system will default to the first entry within the lookup.	N	Lookup (Departments)
SubDepartment	This is an indication of the sub-department the KPI will report on.	This value must exist. The sub-department selected must match up with the sub-departments saved on the system.	If there is a spelling mistake or the sub-department selected on the import does not meet the sub-departments saved on the system, the record will still be allowed to be imported onto the system. However, the sub-department field will be empty.	This will be determined by the users and the codes they associate with the Sub Department. All codes will be unique.		N	Lookup (Sub Departments)
Team	This is an indication of the team the KPI will report on.	This value must be valid from the system. The team selected must match up with the teams saved on the system.	If there is a spelling mistake or the team selected on the import does not meet the teams saved on the system, the record will still be allowed to be imported onto the system. However, the team field will be empty.	This will be determined by the users and the codes they associate with the Team. All codes will be unique.		N	Lookup (Teams)
Owner	This is an indication of the owner of the KPI.	This value must exist in the system. The user-selected must match up with the users saved on the system.	If there is a spelling mistake or the user selected on the import does not meet the user saved on the system, the record will NOT be allowed to be imported onto the system.	N/A	Must be the name of the person.	Y	Lookup (Users)
Calendar	Calendar to use	The value must exist in the system		Name of an existing Calendar Financial Monthly		N	Numeric
Frequency	This is an indication of the frequency of the KPI figures to be tracked.	Only one of the following choices: Daily, Weekly and Monthly	Daily will be selected if this field is empty.	Daily, Weekly, Monthly	1	Y	Lookup (Frequency)
Unit Value	This is the unit of value for the KPI.	Must be a figure, with two decimal places.	N/A	Any numeric value.	0		Numeric
Decimals	Decimal Places	Numeric value			2	N	Numeric
PerformancePeriod	This is the Performance Period of the KPI	Can make a selection from the following choices: Current Month, Current Week, Day, Last Month and Last Week	The row will not be imported if an invalid number not between 1 and 2 is inserted	Current Month, Current Week, Day, Last Month, Last Week	N/A	Y	Numeric
Display Baseline	This is to show Baseline or not	False or True	Must False or True	False or True		N	Numeric
Display Three Month Average	This is to show average in the past three months	False or True	False or True	False or True			Numeric
ChartMonths	Number of Month bars on the KPI Summary Chart	Insert a whole number			4	N	Numeric
ChartWeeks	Number of Week bars on the KPI Summary Chart	Insert a whole number			4	N	Numeric
ChartDays	Number of Day bars on the KPI Summary Chart	Insert a whole number			7	N	Numeric
AccessLevel	The Access level (KPI level Permissions) that will be granted to the KPI	A value must be specified	System will throw an error if no value has been entered.	Default \ Confidential \ Global	N/A	Y	Lookup (AccessLevels)
Warning Level	Variance percentage to show Amber warning face	Must be a figure. If no value is provided a default value will be used.	If left blank, it will use a default value (See Default Values column)	Any numeric value.	0.00	N	Numeric
Target Frequency	This is an indication of the target frequency of the KPI figures to be tracked.	Only one of the following choices: Daily, Weekly and Monthly	N/A	Daily, Weekly, Monthly	N/A	Y	Lookup (Frequency)

Sample.

Code	Name	Description	Baseline	BaselineStartDate	BaselineEndDate	UnitofMeasure	ExpectedTrend	AllowZeroes	MeasurementType	Department	SubDepartment	Team	Owner	Calendar	Frequency
Drill	# of POs late (Awaiting license)	# of POs late (Awaiting license)	0,00	2017-08-01		#	Downwards	TRUE	Daily Values or Performance Rate	Mining	pit 1		admin	Default	Da
New	New KPI	New KPI	0,00	2017-08-02		Hours	Upwards	FALSE	Daily Values or Performance Rate	Mining	pit 2		admin	Default	Da

**KPI Redesign sample:**

Code	Name	Description	Baseline	BaselineStartDate	BaselineEndDate	UnitofMeasure	ExpectedTrend	AllowZeroes	KpiValueCalculationMethod	Department	SubDepartment	Team
Drill	# of POs late (Awaiting license)	# of POs late (Awaiting license)	0,00	2020-08-01	2021-12-01	#	Downwards	TRUE	Daily Values or Performance Rate	Mining	pit 1	
New	New KPI	New KPI	0,00	2021-01-01	2021-01-01	Hours	Upwards	FALSE	Daily Values or Performance Rate	Mining	pit 2	