Guidelines for Importing KPI results

It's easy to import non-financial KPI results into Fathom. Use a template and fill in your results or create a new Google Sheet or Excel file (.xlsx or .csv), by following these simple steps:

1. Specify the company name in cell B1.
2. Add the column headings – 'KPI name', and your period names.
3. Add the name of each KPI in column A.
4. Add results for each of your KPIs.

Your import file should look something like this:

	A	B	C	D	E	F	G
1	**Company Name**	Vanderlay Industries					
2	**Import Type**	Non-financial					
3							
4	**KPI name**	**Jan-22**	**Feb-22**	**Mar-22**	**Apr-22**	**May-22**	**Jun-22**
5	Number of staff	51	52	54	56	57	52
6	Number of customers	802	931	755	837	900	855

Naming your periods
Monthly period names should use one of the following naming conventions:
'mmm yyyy'   (Jan 2022)
'mmmm yyyy'   (January 2022)
'mmm-yy'   (Jan-22)
'dd/mm/yyyy'   (31/01/2022)

Quarterly results*
If you are importing quarterly data, insert a row and add the description 'Quarterly' in cell B3. Quarter period names should use one of the following naming conventions:
'Qx yyyy'   (Q1 2022)
'Qx yyyy/yyyy' (Q1 2021/2022)
'dd/mm/yyyy'   (31/01/2022) - [Use this convention for QTD periods]

Annual results*
If you are importing annual data, insert a row and add the description 'Annual' in cell B3. Annual period names should use one of the following naming conventions:
'yyyy'   (2022)
'yyyy/yyyy'   (2021/2022)
'dd/mm/yyyy'   (31/01/2022) - [Use this convention for YTD periods]

* Google Sheet importing is not available in this format.

What periods should I include in my import file?
If you want to add KPI results for one or more periods, then only include these periods in your import file. If you wish to update KPI results for prior periods, then also include these periods in your import file.

Do I need to update results for all of my custom KPIs?
No. During an import only the KPIs listed in column A will be updated with new results data.