# PERFORMANCE MANAGEMENT DASHBOARD STEP-BY-STEP GUIDE

# TABLE OF CONTENTS

PERFORMANCE PLANNING
DEFINE A GOAL
DEFINE OBJECTIVE
DEFINE A NEW KPI
DEFINE A NEW DELIVERABLE
TO ADD MILESTONES FOR DELIVERABLES
PERFORMANCE TRACKING
ENTER KPI
SUBMITTING KPI DATA FOR APPROVAL
Approve KPI Data
ENTER MISSION'S REPORT
ENTER DELIVARABLE DATA
PERFORMANCE ANALYSIS
GENERATE PERFORMANCE REPORT
ANALYSE KPI REPORT
GENERATE EXECUTIVE SUMMARY
PERFORMANCE COMMUNICATION
VIEW PERFORMANCE REPORTS

	6
Invite New User	6
Assign a Role to a User	7

#### PERFORMANCE PLANNING

#### **DEFINE A GOAL**

Step 1: Log in to the Dashboard with your credentials.

Step 2: Navigate to the "Performance Planning" menu

Step 3: Click on "Goal"

Step 4: Click on "Add Goal"

Step 5: Provide details such as Code, Name, Short name, Definition and Owners

Step 6: Click on "Save"

## DEFINE AN OBJECTIVE

Once you have defined the Goal, while you are on that page:

Step 1: Click on "Add Objective"

Step 2: Provide details such as Code, Name, Short name, Definition and Owners

Step 3: Click on "Save"

# DEFINE A NEW KPI

Once you have defined the Objective, while you are on that page:

Step 1: Click on the "Add KPI" button to create a new KPI.

**Step 2:** Provide details such as Code, KPI name, short name, and definition. Choose a unit of measure, specify the frequency, assign the owner, assign data manager, select Org Unit, select supporting indicator,

Note: [Add a note on how the Formula Builder Works]

Step 3: Click on "Validate Formula"

Step 4: Click on "Save and Close"

# DEFINE A NEW DELIVERABLE

Step 1: Log in to the dashboard using your credentials.

Step 2: Go to "Performance Planning"

Step 3: Click on the "Deliverables" button

Step 3: Click on the "Add deliverable" on the right-hand side of the page

**Step 4**: Enter the desired information such as code, name, short name, description, owner, data manager, and commencement and completion dates

Step 4: Click "Save" to complete

# TO ADD MILESTONES FOR DELIVERABLES

Step 1: Click the "Add" button

Step 2: Enter the desired information, such as % Value, start and end date for the milestone

Step 3: Click "Save & Close" to complete

Note: Repeat steps 1 and 2 to add more milestones

#### **PERFORMANCE TRACKING**

#### ENTER KPI

Step 1: Log in to the Dashboard with your credentials.

Step 2: Navigate to the "Performance Tracking" menu

Step 3: Click on "KPI"

Step 4: Select the KPI to input data. by clicking the corresponding action "+" button

Step 5: Click on "Add" to open the data entry screen

Step 6: Input the performance data in the "Value" space

Step 7: Click on "Save & close"

#### SUBMITTING KPI DATA FOR APPROVAL

**Step 1:** Log in to the Dashboard with your credentials.

**Step 2:** Navigate to the "Performance Tracking" menu

Step 3: Click on "KPI"

Step 4: Click on "Submit"

Step 5: Enter a submission note

Step 6: Click on "Submit".

#### APPROVE KPI DATA

Step 1: Log in to the Dashboard with your credentials.

Step 2: Navigate to the "Performance Tracking" menu

Step 3: Click on "KPI Data Approval"

**Step 4**: Select the KPI by clicking the corresponding "Approve" button.

Step 5: Choose "Approve" or "Return" after reviewing the data.

Step 6: Add any approval/return comments.

**Step 7:** Click on "Approve or Return" to confirm.

#### ENTER MISSION'S REPORT

Step 1: Log in to the dashboard using your credentials.

Step 2: Navigate the "Performance Tracking" menu

Step 3: Click on "Mission Reports"

Step 4: Select your respective Mission from the list

Step 5: Click on "+" on the right side of the page

Step 6: Enter the required information based on the template

Step 6: Click on the "Save as Draft"

Step 7: Enter KPI data for the Quarter and Click on "Save"

Step 8: Click on "Submit" to finalize

#### ENTER DELIVARABLE DATA

Step 1: Log in to the dashboard using your credentials.

Step 2: Go to "Performance Tracking"

Step 3: Click on the "Deliverables"

**Step 4**: Select the desired Initiative that you want to update the implementation status by clicking the corresponding action button

Step 5: Click "Add milestone"

**Step 6:** Select the Milestone and enter actual start and end date, attach the source of verification

Step 7: Click "Save" to complete

Note: You can also attach existing documents as a source of verification

#### PERFORMANCE ANALYSIS

#### GENERATE PERFORMANCE REPORT

Step 1: Log in to the Dashboard with your credentials.Step 2: Navigate and click the "Performance Analysis" menu.

Step 3: Click on the "Generate Performance Report" menu

Step 4: Click on "Generate Performance Report."

# ANALYSE KPI REPORT

Step 1: Navigate to the "Performance Analysis" menu.

Step 2: Select "Analyse KPI Report."

Step 3: Choose the KPI to analyse by clicking the corresponding analyse button

Step 4: Enter the required analysis details.

Step 5: Review and save your analysis.

Note: You can export the KPI report to Microsoft Excel.

# GENERATE EXECUTIVE SUMMARY

**Step 1**: Navigate to the "Performance Analysis" menu.

Step 2: Select "Executive Summary."

**Step 3:** Review and enter performance narratives.

Step 4: Add actions needed

**Step 5:** Click the "Save" button to complete the executive summary.

Note: The report is exportable to Microsoft Excel.

#### PERFORMANCE COMMUNICATION

# **VIEW PERFORMANCE REPORTS**

Step 1: Navigate to the "Performance Communication" section.

Step 3: Click on "Performance Communication"

**Note:** This page comprehensively describes the ministry's overall performance, including an aggregate organizational performance score. You can drill down to get more granular information.

#### USER MANAGEMENT

#### **INVITE NEW USER**

**Step 1:** Log in to the Dashboard with your credentials.

Step 2: Navigate to "User Management."

Step 3: Select "User Invitations"

Step 4: Click on the "Send invitation" button

Step 5: Enter the invitee's email.

**Step 6:** Click "OK" to Send the invitation.

Note: The invitee will receive a registration link by email that expires in 24 hours.

# ASSIGN A ROLE TO A USER

**Step 1:** Log in to the Dashboard with your credentials.

Step 2: Navigate to "User Management."

Step 3: Click on "User" and look for the names of the person to assign a role to in the list

**Step 4: To assign a role, c**lick the corresponding "Person Icon" on the right side next to the recycle bin.

Step 5: Click "Add a role"

Step 6: Select the role to be granted and click "OK" to confirm.