PERFORMANCE MANAGEMENT DASHBOARD

STEP-BY-STEP GUIDE

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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, click 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.