# **ELMA KPI** User Manual





Business Process and Performance Management System

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# Introduction

This book is a quick-start manual on **ELMA KPI**, based on **ELMA BPM Platform**. It is intended for those users who want to master **ELMA BPM** on their own and for those professionals who plan to implement this system.

This book is supposed to introduce the user to some basic functions of project management in **ELMA KPI**.

This book expects the reader to be familiar with **ELMA** functions described in **ELMA BPM Platform** quick-start manual. **ELMA** is supposed to be configured for working with **ELMA KPI**: organizational structure and users are set (learn how to do that in **ELMA BPM Platform** quick-start manual).

Below you will see the list of quick-start manuals:

- User Manual of **ELMA BPM Platform**
- User Manual of **ELMA Web Portal**
- User Manual of **ELMA ECM+**
- User Manual of **ELMA CRM+**
- User Manual of **ELMA Projects +**
- User Manual of **ELMA KPI**

**ELMA Help** provides description of the functions and main system settings.

**ELMA Help** provides a detailed description of system functions and settings.

This is a tutorial rather than a reference guide and it helps users to fully understand main **ELMA** settings and functions. This book introduces the users to **ELMA** step-by-step.

# Chapter 1. ELMA KPI application

**ELMA KPI** is designed for automation of the Key Performance Indicators system. KPI is an acronym for Key Performance Indicators.

In current times, having an effective monitoring process becomes very important. Yet, many companies face the issue of measuring work performance.

In order to motivate employees, companies develop KPIs and mechanisms directed to monitor them. Created models require regular control. However, if monitoring process is not automated, you will need to put a lot of work to support it. That, in turn, can cause larger problems.

**ELMA KPI** allows you to build an effective performance measurement system. This application will help you to reduce expenses on routine operations by automating data collection, storage and tracking processes. It also reduces the likelihood of employees mistakes.

**ELMA KPI** will keep you up-to-date with the progress. Customizable dashboards will allow supervisors to control the most important KPIs and react to possible deviates in time.

You can adjust KPIs to company's peculiarities and company's unique terminology. This makes **ELMA** understandable to each employee.

This manual will take you through the main implementation steps. We expect that key indicators system is already developed. If it has not worked out yet or there is a follow-up work needs to be done you have to finalize it. You should develop and approve KPI system before you implement **ELMA KPI**.

KPIs may depend on measurements that already exist in your company. You need to consider this when determining **calculation method** for KPIs.

When defining **data collection order**, at first, you have to set periodicity – how often actual data has to be updated. Secondly, define the method of data collection. For more details, see chapter **3.1.2 Data collection**.

It is important to work out the question of **responsibility for data collection**. When you start **ELMA** for the first time, you might want to enter KPI values manually just to test how it works. When you assign a person responsible for data collection, you must be objective. Work should be distributed evenly. And managers must ensure that employees do not act out of self-interest. It will help you collect reliable information. Besides, **ELMA KPI** helps to take advantage of management by objectives approach: connect plan values and employees' activity to the company's strategy, and then track the progress towards achieving company's goals using actual values. For more information, see **Chapter 6. Goal Maps.** 

To determine **target (plan) values** of the KPI you can use established standards or statistics from the previous periods. It is also possible to use the results of benchmarking or expert opinions.

You also need to determine **critical values** of the KPI, so that you can make an analysis and reveal deviations. Achievement (or non-achievement) of these critical values should be observed. To define critical values you can use statistics as well.

**Responsibility for achieving KPI plan values** has to be set in accordance with employee's job position. So that the employee will be able to actually affect the results. Let's say you assigned the supervisor as the person responsible for Leads Flow indicator. It means that he must be in control of sales, or at least have an information about demand behavior.

Thus, designed system of key indicators includes:

- 1. Model of KPIs that allows managers to evaluate performance of departments and particular employees;
- 2. Following specifications developed for each element of the model:
  - Calculation method;
  - Method of data collection;
  - Responsibility for data collection and data input;
  - Standard and plan values;
  - Responsibility for reaching planned values of the KPI;

All the parameters listed above are required for successful implementation of **ELMA KPI**.

Before automating the processes, it is necessary to make preparations. Organizational structure must be set. Users should know how to assign the tasks and control tasks execution (**ELMA BPM Platform** User Manual Manual provides detailed instructions on how to do this).

Preparation steps will be considered in the next chapter.

# Chapter 2. Preparation for ELMA KPI implementation

Before you start working, it is required to install **ELMA**, **ELMA Designer** (application that allows creating an organizational structure, processes and KPIs) and configure them. You can find detailed information on installation process in **ELMA BPM Platform** User Manual Manual.

It is also necessary to configure users' access permissions for **ELMA KPI**. To do this just add a user to one of the KPI groups. Go to **Administration**  $\rightarrow$  **Users**  $\rightarrow$  **Group**  $\rightarrow$  **KPI: Users**. You can find full information on how to work with user groups in **ELMA Help**.

Since the responsibility for KPIs will be set according to company's organizational structure, you need to create it before configuring the KPI model. You can learn more information on how to form organizational structure in the **ELMA BPM Platform** User Manual Manual.

There are two types of elements used in **ELMA KPI** – indicator and metric. Indicator is a measurable value that demonstrates how effective the company is at achieving its goals.

Metric – is also measurable value, but in contrast to indicator it has no target value, it just states the fact. Metrics are commonly used for monitoring and for calculating the values of other KPIs.

Let's create the KPI model. Organizational structure already exists. As an example, we take service company that faced a few management problems, as follows:

- Data is unstructured and information about situation on the branches comes late, which makes it harder to respond to the raised issues in time;
- Employees are poorly informed about current priorities of the organization and do not consider their activity in the frame of these priorities;
- Financial incentives for employees do not meet company's goals and do not affect employees' commitment.

Fig. 1 illustrates the organizational structure. KPIs will be developed for the employees that are blocked by a blue rectangle.



Fig. 1. Model of Organizational Structure

In order to solve the problems described above company developed the following model of KPIs:

- 1. **Revenue** is a metric. It refers to the amount of money (in euro) company collects for providing services. It is calculated on a monthly basis.
- Payroll budget is a metric. It is the total amount of money (in euro) paid in wages. It is calculated on a monthly basis.
- 3. **Material cost** is an indicator. It represents the money (in euro) spent on the materials. Material costs are calculated separately for each branch and then are summed up to a final amount. Consequently, it will be split into several indicators:
  - 3.1. Material costs in the Branch office No 1;
  - 3.2. Material costs in the Branch office No 2;
  - 3.3. Material costs in the Branch office No 3;
  - 3.4. Material costs in the Branch office No 4.
- 4. **Gross profit** is an indicator. It is calculated as revenue minus payroll budget minus material costs. It is calculated on a monthly basis.
- 5. **Number of complaints** is a metric. It represents the total number of complaints received at each branch. It is calculated for each branch on a monthly basis.
- 6. **Number of service requests** is a metric. It represents the total number of customers served at each branch. It is calculated for each branch on a monthly basis.
- Level of Customer Satisfaction is an indicator. In order to calculate this ratio you need to use Number of complaints and Number of service requests metrics. It is calculated on a monthly basis for each branch on a monthly basis.
- 8. **Number of disputes** is an indicator. It is the number of issues raised between the company and counterparty during the period. It is calculated on a monthly basis.

- 9. **Disputes settled out of court** is a metric. It refers to the number of disputes that were resolved without the involvement of courts. It is calculated on a monthly basis.
- Out-of-Court Settlement is an indicator . It can be calculated using Number of disputes and Disputes settled out of court metrics. It is calculated on a monthly basis.
- 11. **Total number of legal cases** is a metric. It refers to the number of disputes between company and counterparty that were resolved by a court. It is calculated on a monthly basis.
- 12. **Favorable judicial decisions** is a metric that shows the amount of judicial decisions that meet company's interest. It is calculated on a monthly basis.
- 13. **Successful judicial proceedings** is an indicator. In order to calculate this ratio you need to use **Total number of legal cases** and **Favorable judicial decisions**. It is calculated on a monthly basis.

Regular data monitoring will allow managers to get information on how the work goes and make appropriate management decisions.

Assigning employee responsible for achieving the target value will allow you to link company's operating results with activities of the particular employee. It is possible to measure his performance in percentage and convert it into incentive motivation.

Let's look at the performance of: Head of production, Head of legal and Secretary.

To estimate performance of the Head of production we will need to determine:

- whether the plan value for **Gross profit** indicator was reached;
- whether the plan value for **Level of Customer Satisfaction** indicator was reached;
- expert opinion of the executive director.

To estimate performance of the Head of legal we will need to determine:

- whether the plan value for **Out-of-court Settlement** indicator was reached;
- whether the plan value for **Successful Judicial Proceedings** indicator was reached;
- whether the SMART tasks are accomplished.

Performance of the Secretary will be estimated by:

- employee performance evaluation that is conducted by CEO;
- schedule compliance rating (ratio of the number of accomplished tasks to the total number of tasks that were defined for a month).

Let's deploy this KPI model.

# Chapter 3. Creating KPIs

After developing a model, you need to create and set the indicators in ELMA Designer. All operations will be made in the **KPI** section.

Menu on the left-hand side of the screen shows sections that are available for editing, such as: list of KPIs and goals, responsibility matrices and data collection settings (Fig. 2).



Fig. 2. KPI section of the ELMA Designer

Toolbar is located at the top of the Designer window. Pages of the elements will appear on the right part of the window, where you can edit the features.

## 3.1 Key Performance Indicators

### 3.1.1. Creating an indicator

In order to create an indicator set the cursor over the **KPI** (or on any other existed indicator) and by right clicking on it choose **Create** from the context menu (Fig. 3).

Menu Irganiza	ational Structur	Processes	Objects	locumen	t Managemer	Projects	KPI	Reports
Save Check Ad	ctions							
🕥 KPI								
	reate reate Folder dit Properties lelete lown evel Up evel Up evel Down ty Matrices			<	a			
Collect Data								

Fig. 3. Creating an Indicator

It is often necessary to combine KPIs into folders - by business units or along functional lines. In order to create a folder, you must select **Create Folder** from the shortcut menu (Fig. 4).

Menu Irganizational S	Structun Processes	Objects	ocument Manageme	r Projects	KPI	Reports
Save Check Actions						
Create <pcreate< p=""> Create <pcreate< p=""> <pcreate< p=""> <pcr< th=""><th>older perties</th><th></th><th>4</th><th></th><th></th><th></th></pcr<></pcreate<></pcreate<></pcreate<>	older perties		4			
🔛 Responsibility Matri	ices					
Collect Data						

Fig. 4. Creating a folder

Let's create a **Revenue** metric that shows the sum of the cash receipts (in euro) received from the services rendered to clients. **Revenue** – is a metric and it is calculated on a monthly basis. Since the production sector is responsible for this, it will be reasonable to create appropriate folder (Production). Thus, by setting the cursor on it, select **Create** command from the shortcut menu.

In the appeared window fill in the fields marked with a red asterisk (Fig. 5):

0	Create an indicator -		×						
Common Values 🛃 (0) Responsibility Matrix Influences									
Displayed Name *	Revenue								
Description			< >						
Row of Values	Expand to a Row								
Unique Name *	Revenue								
Periodicity *	Month								
Туре *	Metrics								
Measurement Unit *	Euro								
	🔗 ОК 🛛 🧯	🕉 Can	cel						

Fig. 5. Filling primary data

- **Displayed Name** the name of the metric. In this field enter **Revenue**;
- **Unique Name** by default, copies displayed name. This is the system name of the indicator;
- **Periodicity** select **Months** from the list;
- **Type** select the value **Metric**;
- Measurement Unit choose the value Euro.

You can fill in the rest later, while editing. Now click the **OK** button.

You can edit indicator or metric parameters at any time by selecting them from the list of elements. The list of elements is on the left side of the menu. To choose an item make a double-click. Thus, a new tab will appear in the right part of the window (Fig. 6).

Menu Organizational Structure Processes Objects	Document Management Projects	KPI Reports	Interface	BPM Apps	Scripts	Publishing	Style 🔻	MAX 🕐
Save Check Actions Model Management								
🧿 крі	Revenue 8							
E- O KPI	Common Values 🚨 Responsibility M	fatrix (0) Influence	es					
thi⊷ 🚰 Rows transformation (International International Intern International International Internation International International International International International International International Internati	Displayed Name *	Revenue						
	Description							^
	4							~
	Row of Values	Expand to a R	low					
•	Unique Name *	Revenue						
	Periodicity *	Month		-				
🖧 Goals	Type *	Metrics		-				
2 Responsibility Matrices	Measurement Unit *	Euro		-				
Collect Data	A							
				_	_	_	_	

Fig. 6. Parameters of the Revenue metric

Let's define parameters in the **Values** tab (Fig. 7):

- Since the metric does not have plan values, **Scale** and **Plan Value Collection** sections can not be edited (access to edit these sections is closed).
- In the **Default Values** section leave 0 as the **Fact** value.
- **Fact Value Collection** section allows to you to define how to get the final metric values. Tick the **Manual Collection** box.

Nevenue 8	
Common Values 🖉 Responsibility M	fatrix (0) Influences
Scale	
Scale	Increase 🔹
	Plan
Color	0 -50%
	trom plan
Performance	0% 106%
Default Values	
Plan	Fact 0
Fact Value Collection	
Value Collection Method	Manual Collection      Automatic Collection     Script
Formula	A
	v
Plan Value Collection	
The same as the fact	
Value Collection Method	Manual Collection     Automatic Collection     Script
Formula	A
	v

Fig. 7. Values tab in the Revenue metrics

Now look at the **Responsibility Matrix** tab.

Use **Add Job Position** button to add the **Accountant** post. Since he will be responsible for entering the actual values of the metric, check the **Fact** box.

Bevenue 8									
Common Values 🛃 Responsibility Matrix (1) Influences									
Inherit access permissions from parent folder									
Parent Folder Permissions									
Job Positions Informed									
Extra Permissions									
👍 Add Job Position		合 Add User Group							
Job Positions	Responsible	Plan	Fact	Supervisor	Informed				
😵 Accountant			✓						

Fig. 8. Assigning employee responsible for fact data entry

The metric is set. You can create other metrics and indicators in a similar manner. You need to set the parameters for each element of the model. Once you published the model all the changes will be applied in **Web Application**. You can get more information about model publishing in **3.1.3 Publishing the changes** section.

#### 3.1.1.1. Creating rows

In our model, **Level of Customer Satisfaction** KPI should be broken down by sections. To do this expand the indicator into rows.

Before proceeding to configure this KPI, you must create a directory number. In the model tree on the left find the **Rows** element and, thus, create a new element (Fig. 9).



Fig. 9. Creating a reference to a row

In the appeared window fill in the name of the row and click **Next** to continue (Fig. 10).

Ø	Create an object – 🗖 🗙						
	Step 1 General Set	tings					
1	Displayed Name *	Branch offices Object Name in your language. The name may contain any characters.					
	Group*	Rows 🗣 🗙 🗸					
Common	Description						
2		Data Structure ¥					
Properties		Next 😢 Cancel	]				

Fig. 10. General parameters of the row

In the next step click on **Next** again. In the list of rows you will see the **Branch offices** section. Before entering into a **Web Application** and filling in the directory, you must:

- Go to the Designer **Publishing** tab;
- On the next page, find the section **Objects** and click **Go to object** (Fig. 11);

0		ELMA 3.8.	.2.23878	-	×
			Projects KPI Reports Interface BP	M Apps Scripts Publishing Style -	MAX (?)
Common Section	Restart Server Server				
da Organizati	onal Structure		* O Processes		*
The organizatio			No changed processes	Go to Processes	
Date published		1/19/2016 5:26 PM	Drafts	<u>0</u>	
Published By		Администратор ELMA	Published	2	
			Deleted	<u>0</u>	
Objects			* Document Manageme	ent	*
Objects change	ed: 1	Go to Objects	No changed objects	Go To Documents	
Drafts		1	Drafts	<u>0</u>	
Published		495	Published	<u>16</u>	
Server restart is re	equired	<u>0</u>	Server restart is required	<u>0</u>	
Deleted		<u>0</u>	Deleted	<u>0</u>	
Projects+			× 🙆 KPI		*

Fig. 11. Publishing objects tab

• Move the cursor to the created row (Branch offices) and click on **Publish** button (Fig. 12);

0	ELMA 3.8.2.23878		- 🗆 ×
Menu Organizational Structure Processes	Objects Document Management Projects KPI Reports	Interface BPM Apps Scripts Publishing	Style 👻 MAX 🕐
Objects Publish Section Drafts			
Drafts Published Restart is required			
Name	Author	Date created Date modified	Date published
Cr indiagenent Cr Rows Cr Branch offices	ELMA Administrator	1/12/2016 11:18 AM 1/20/2016 10:04 AM	

Fig. 12. Publishing created row

• Return to the **General Information** section on the **Publishing** tab of the Designer (Fig. 13);

Мепц		Organiza	ational Structure	Process	ies (	Objects	Document Ma	nagement	Projects	KPI	Reports
	Cbje	cts	Publish								
Draft	Ģ	Gen	eral Information								
Name	0	Proc	esses					Author			
	A	Obje	cts								
		Docu	ument Managem	ent							
		Proje	ects+								

Fig. 13.

• Restart the **ELMA** server, by clicking corresponding button (Fig. 14).

Menu Organizational Structure P Common Section Server There are changes in the object t	nocesses Objects Document Managem	oply the c	icts KPI Reports Interface BPM A	pps Scripts Publishing Style +	XAM
button		*	O Processes		Ŕ
The organizational structure is			No changed processes	Go to Processes	
Date published	1/19/2016 5:26 PM		Drafts	0	
Published By	ELMA Administrator		Published	2	
			Deleted	<u>0</u>	
Objects		*	Document Management		*
No changed objects	Go to Objects		No changed objects	Go To Documents	
Drafts	<u>0</u>		Drafts	<u>0</u>	
Published	496		Published	<u>16</u>	
Server restart is required	1		Server restart is required	<u>0</u>	
Deleted	<u>0</u>		Deleted	٥	
Projects+		*	KPI		*
No changed objects	Go to Projects		The KPI model is changed	Publish	
Drafts	<u>0</u>		Date modified	1/20/2016 9:54 AM	
Published	1		Modified by	ELMA Administrator	
Server restart is required	<u>0</u>				
Deleted	0				

Fig. 14. Restarting the server

You can find detailed information about objects and publishing process in **ELMA Help**. After restarting the server, you will see **Branch offices** folder in **Objects** section (Fig. 15).

0	Jan 20 Wednesday	Administrator	
Messages		Objects	~
💽 Tasks 📇 Company		- I KPI Management	
Calendar		Documents	
Objects		Projects+	
Cocumer	its	- KPI Management	

Fig. 15. Branch Offices object in Web Application

Clicking the name opens the object's page. Then, you should click on **Create** button and add appropriate entry. In the **Appeared in Row On** field set the date when the row item will participate in the calculation of the KPI (Fig. 16).

Jan 20 Wednesday	Save Cancel	Administrator
Messages	Branch offices - Add a	n item
🚬 CRM	Name *	Branch Office 1
Tasks	Appeared In Row On: *	01/20/2016
📇 Company	Removed From Row On:	
Calendar		Page generated in 5429 ms ELMA v. 3.8.2.23878 R.afb18e9b85f611
Processes		
Objects	< Comparison of the second sec	

Fig. 16. Adding item into Branch Offices object

Similarly, add the records for all four branches.

Go back to **ELMA Designer**. To decompose **Level of Customer Satisfaction** KPI into rows, you should decompose it into metrics that are involved in the calculation of this KPI - **Number of complaints** and **Number of service requests**.

Let's open the window for editing **Number of service requests** metric. On the tab **Common**, click on **Expand to a Row** checkbox. In appeared fields select **By Objects**, and from the dropdown list – **Branch Offices**. Check the **Has a proper value** box (Fig. 17).

Number of service requests Ø						
Common Values 🔊 Responsibility Matrix (0) Influences Configure rows						
Displayed Name *	Number of service requests					
Description						
		×				
Row of Values	Expand to a Row					
Configure a row of values	By Users (Personal KPI)					
	By Objects Br	ranch offices				
	Enable Filter					
	🗷 Has a proper value					
Unique Name *	Number of service requests					
Periodicity *	Month	×				
Туре *	Metrics	×				
Measurement Unit *	Item	v.				

Fig. 17. Setting expansion parameters

This would mean that the metric will be calculated according to the method we point in the **Values** tab (based on the metric values on the branches).

Next, go to the **Values** tab. As the **Number of service requests** is a metric, the access to configure the scale is closed. In appeared section, select **Total of row values** as the **Calculation method** (Fig. 18).

Number of service requests 🛽					
Common Values 🔂 Responsibi					
					^
	0				
	Ŭ.				
	0.07				
	0.76				
Default Values					
		Fact		0	
Coloriation Mathed					
Calculation Method	Total of Bow Values	Disa		Calculated Individuallu	
Fact	Total of How Yaldes	Fian		Calculated manadally	
Fact Value Collection			_		
Value Collection Method	Manual Collection     A	utomatic Collection	Script		
Formula					
					~ v
		A 1111111 A			

Fig. 18. Values tab settings

In the **Fact Value Collection** block choose the **Automatic collection** – in that case, calculations will be based on **Row Values**.

**Configure rows** tab will appear after checking **Expand to a Row** box. Here you can configure calculation of the values. Secretary will enter the data on **Number of Service Requests** in the branches. Thus, it is necessary to click on **Manual Collection** (Fig. 19).

Number of service requests 🛽	
Common Values 🔒 Responsibility Ma	atrix (0) Influences Configure rows
Default Values	
Plan	Fact
Fact Value Collection	
Value Collection Method	Manual Collection     Automatic Collection     Script
Formula	
1 officia	
	~ ·
Plan Value Collection	
The same as the fact	
Value Collection Method	Manual Collection O Automatic Collection O Script
Formula	~
	V

Fig. 19. Configuring collection method

In a similar way, you can make adjustments for the **Number of complaints** metric and **Level of Customer Satisfaction** indicator.

Enter the following settings for the **Level of Customer Satisfaction** indicator:

- In the **Scale** section, set **Increase** as the scale type, since our goal is to increase the value of the KPI.
- It is necessary to set boundary values on the color scale by clicking on the respective numerical notations:
  - Type the number located on the border of yellow and red color in the Color line. In the appeared window click on the Plan Deviation, Units of Measurement. It shows possible range of deviation from the Plan Value. If the Fact Value falls beyond this critical value, the scale will be colored red. Set the value to -10. For us it is the upper limit of the critical zone. Thus, in case the KPI fact value will be lower than planned by 10 points (percentage, in our case), the situation will be considered as intolerable and will require additional actions to resolve it (Fig. 20).

🔅 Enter Va	lue ×
Start of the Yellow Zone	
Plan Deviation, Percent	* *
Plan Deviation, Units of Measurement	-10 🖨
O Value, Units of Measurement	
	🧭 OK 🛛 🔞 Cancel

Fig. 20. Setting breakpoint

In Performance line select a 100% value. Upon reaching 100% of Plan
 Value indicator light turns green. (Fig. 21).



Fig. 21. Scale Configuration

- In the **Default Values** section leave the **Fact Value** empty, and set the **Plan Value** to 95%.
- The **Fact and Plan** values of the KPI are calculated regardless of what are the values in the rows, so in the **Collection Method** section both for **Fact** and for **Plan** values select **Calculated Individually**.
- Fact Value Collection section defines the parameters for getting the final values of the KPI. Select **Script** to configure the calculation of the KPI (Fig. 22).

Fact Value Collection					
Value Collection Method	O Manual Collection	O Automatic Collection	<ul> <li>Script</li> </ul>	Wizard	
Formula					^
					~

Fig. 22. Selecting Script method

• You can apply the formula using the wizard – the button that is on the right side from the **Script** item. Clicking this button will open a window that is divided into several sections: list of KPIs on the right, formula bar on the bottom left and on the upper left corner - field for entering the values. There is a panel for arithmetic operations on the border between the upper and lower left sections of the window.

All the necessary elements of the formula can be moved to the **Value** field by using drag-and-drop function. Fig. 23 displays the process of entering formulas for KPI calculation.

🔿 For	rmula Wizard 🗕 🗖 🗙
Weight         Formulas           Name              • Number of complaints            •         •           •         •           •         •           •         •           •         •           •         •           •         •	KPI
+     -     ×     •     Number       Value ("Number of complaints") / Value ("Number of service requests")	Wumber of complaints     Wumber of complaints     With the sevenue     With the sevenue
	🔗 OK 🔞 Cancel

Fig. 23. Formula Wizard

After you entered the formula click **OK**.

• Plan Value Collection block can be filled in the same manner as Fact Value Collection. In our case, Plan Values are set by default, so uncheck The same as the fact box and select Automatic collection as the Collection Method (value will be based on the information specified in section Default Values - for the planned values it was set to 95%).

Filled **Values** tab should look like this (Fig. 24):

①Level of Customer Satisfaction ②		
Common Values 🚨 Responsibility M	fatrix (1) Influences Configure rows	
Scale	Increase	^
		Plan
Color	00	
	errörr plan	
Performance	0%	100%
	<u>070</u>	100%
Default Values		
Plan	95 Fact	
Calculation Method		
Fact	Calculated Individually Plan	Calculated Individually
Fact Value Collection		
Value Collection Method	O Manual Collection O Automatic Collection	Script Wizard
Formula	100 - Value ("Number of complaints") / Value ("Number of service	ce requests") * 100
		~
Plan Value Collection		
The same as the fact		
Value Collection Method	O Manual Collection O Automatic Collection	Script
Formula		^
	A	

Fig. 24. Filled Values tab

The value of each element of the **Level of Customer Satisfaction** KPI should be calculated by a formula similar to the one specified in the **Values** tab. Therefore, click on **Configure rows** and enter the formula in the **Fact Value Collection** section (Fig. 25).

Subject of Customer Satisfaction						
Common Values 🕵 Responsibility M	atrix (1) Influences Co	onfigure rows				
Default Values						
Plan	95		Fact			
Fact Value Collection						
Value Collection Method	Manual Collection	O Automatic Co	ollection	Script	Wizard	
Formula	100 - Value ("Number o	fcomplaints") / Va	alue ("Number of	service requests"	) * 100	^
Plan Value Collection						
The same as the fact						
Value Collection Method	Manual Collection	O Automatic Co	ollection	Script		
Formula						^
						~

Fig. 25. Configuring rows for Level of Customer Satisfaction indicator

The planned value of the KPI will be entered manually for each of the branch offices.

#### 3.1.1.2. Personal KPI

KPI value may depend on the work of particular employees. Thus, you can decompose KPI into personal indicators. You can do this following the same principle as the decomposing into rows. The only difference is that it is not required to create the object.

In described model **Material costs** are decomposed into personal values in each of the branch offices. Let's look at the configuration sequence taking **Material cost in the Branch office 1** as an example. To do this, check the **Expand to a row** box and select **By Users (Personal KPI)** option. Also tick the **Has a proper value** box (Fig. 26).

Material costs in the Branch office 1 * 🔕							
Common Values 💩 Responsibility Matrix (1) Influences Configure rows							
Displayed Name *	Material costs in the Brand	Material costs in the Branch office 1					
Description							
			× .				
Row of Values	Expand to a Row						
Configure a row of values	By Users (Personal K	By Lisers (Personal KPI)					
		Demok efficien					
	By Objects	Branch offices					
	Has a proper value						
	Marcal and the D	L 17 1	_				
Unique Name "	Material costs in the Brand	ch office I					
Periodicity *	Month	•					
Type *	Indicator	•					
Measurement Unit *	Euro	<b>•</b>					
	A ****	A					

Fig. 26. Parameters for Material costs in the Branch Office No.1

In the **Values** tab put 0 as a fact value and 24000 as plan value. Set appropriate boundary values on the color scale. Choose **Total row values** as calculation method for the fact values and **Calculated Individually** for the plan values. Then select **Automatic collection** in **Collection Method** block (Fig. 27).

Material costs in the Branch office 1	8			
Common Values 🔕 Responsibility M	atrix (6) Influences Configure rows			
Scale	Decrease	•		
	Pla	an		
Color	0		+4000 +8	000
Performance				
	<u>0%</u> <u>10</u>	<u>)%</u>		<u>0%</u>
Default Values				
Plan	24000	Fact	0	
Calculation Method				
Fact	Total of Row Values	Plan	Calculated Individually	-
Fact Value Collection				
Value Collection Method	Manual Collection Automatic Col	lection OScript		
Formula				^
				×
Plan Value Collection				
I he same as the fact				
Value Collection Method	Manual Collection     Automatic Col	lection OScript		
Formula				^
				~

Fig. 27. Values parameters Material costs in the Branch Office No. 1

#### Make the Head of the Branch Office No.1 responsible for this KPI (Fig. 28):

Б	dra Permissions						
	🖕 Add Jo	b Position			🖕 Add User Grou	p	
	Job Positions	Responsible	Plan	Fact	Supervisor	Informed	
8	Department Head: Branch office 1	<ul> <li>Image: A second s</li></ul>					

Fig. 28. Responsibility matrix for Material costs in the Branch Office No. 1

In the **Configure Row** tab enter all the job positions that will affect the KPI value. Then, set **Automatic Collection** for **Fact** and **Plan Values** (Fig. 29).

Material costs in the Branch office 1	8				
Common Values 👌 Responsibility M	atrix (0) Influences Co	nfigure rows			
👍 Add Jo	b Position			🛖 Add User Group	
		Job Posi	tions		
Branch Office 1: Customer Service R	epresentative				×
😵 Branch Office 1: Service Advisor					×
Branch Office 1: TSR (technical supp	oort representative)				×
Default Values					
Plan			Fact		
Fact Value Collection					
Value Collection Method	Manual Collection	Automation	c Collection	Script	
Formula					~
					Y
Plan Value Collection					
The same as the fact					
Value Collection Method	Manual Collection	Automatic	c Collection	Script	
Formula					^
					Y
		A	A		

Fig. 29. Personalization parameters for Material costs in the Branch Office No. 1

Now when the KPIs are established, you must configure collection process.

## 3.1.2. Data collection

ELMA KPI allows you to collect data on KPIs in several ways:

- Manual collection particular employees are responsible for the data entry.
- Through data collection processes set in the Web Application.
- **Automatic collection** data is collected by the system from external or internal sources automatically.

#### 3.1.2.1 ELMA tasks

In order to minimize errors in established data entry sequence, **ELMA KPI** allows users to set the task for entering KPI values.

To create a task, you must open **Data collection** section and by setting the cursor to the **ELMA Tasks** choose **Create** from the shortcut menu (Fig. 30). Let's create a task for the secretary.



Fig. 30. Creating data collection task

In the appeared window fill in the following sections:

- **Name** name of the task;
- **Author** the one who creates the task;
- **Responsible** employee responsible for data entry (he also must be recorded in the KPI responsibility matrix as the person responsible for entering actual or planned values);

- **ELMA Task Name** this field specifies the subject of the task, that will be shown in **ELMA Web Application**;
- **Task control** tick the **Completion Check** box and in the appeared fields choose the executive director as a supervisor and set **Notify when completed** as the **Control Type** (Fig. 31).

() ()	Create Data Source: ELMA Task - "	×
Common KPI		
Name *	Collecting data about requests and complaints	
Author	Executive Director	<b>v</b> X
Responsible	Secretary	<b>v</b> X
ELMA Task Name	Enter data about service requests	
Describing an ELMA task		^
		~
Duration	1 + day(s)	
Task Control	Completion Check	
Supervisor	Executive Director	▼ 🞇
Control Type	Notify when Completed	
	🖉 ОК 🛛 🔞	Cancel

Fig. 31. General settings for data collection

In the edit box click the **KPI** tab. Here you need to select indicators that should be controlled by the secretary. Select those you need. Specify an interval on the scale from **-1** to **Current**. Thus, we have set the period (last month) for data entry. After you have made all the settings click **OK** (Fig. 32).

0	Create Data Source: ELMA Task – 🗖 🗙							
Common KPI								
Period	-1 🔪	1 1		I I I				
	previous		current		next			
🖕 Add	💥 Delete							
Indicator		Plan F	act Personal Plan	Perso	nal Fact			
Number of service	e requests				✓			
Number of complete	aints				✓			
				🥏 ОК	🚫 Cancel			

Fig. 32. Selecting KPIs for data collection

The task is created now. To make sure that the task was assigned to the employee in time you must configure the scheduler. For more details, see section **3.1.2 Tasks Scheduler**. Similarly, configure data collection for **Revenue** and **Payroll budget** metrics (by assigning tasks to the Accountant).

### 3.1.2.2 ODBC Data Sources

**ODBC (Object Data Base Connector)** – interface that provides a way to access a wide range of databases - **Oracle**, **MS SQL**, for **Excel**, **Access-files** and text files.

For the successful implementation and work of the ODBC data sources, the following prerequisites should be met:

- File (ODBC data source) that is used to import the data must be on the same computer (server) as the **ELMA server**;
- **ELMA** should have access to the ODBC system or ODBC must be created by the same user that uses **ELMA**;
- The names of the KPIs in the file must exactly match the names of the unique **ELMA** indicators, where you are about to import the data;
- If you want to import data for personal indicator or row, then it is necessary to specify **ELMA** user login and the name of a row, which will correspond to the personal KPI value (see. Example below).
- When creating an ODBC data source in **ELMA**, file must be closed.

Let's look at the following example: import the data from the **Material costs.xls** file to get the **Material costs** KPIs values for three months - January, February and March (Fig. 33). **Row** column specifies user logins for **ELMA**. This way the system determines which user should be linked to a particular value of the indicator. For example, Service Advisor of the first branch office has to enter "Cu5tm1" to log in. Therefore, you will see "Cu5tm1" in the **Row** column in one line with the KPI values that correspond to this employee.

	А	В	С	D	E
1	Indicator name	Plan	Fact	Date	Row
2	Material costs in the Branch Office 1	8000	7580	01.01.2015	Cu5tm1
3	Material costs in the Branch Office 1	8000	6500	01.01.2015	Cu5tm2
4	Material costs in the Branch Office 1	8000	8250	01.01.2015	Cu5tm3
5	Material costs in the Branch Office 1	8000	7200	01.02.2015	Cu5tm1
6	Material costs in the Branch Office 1	8000	7856	01.02.2015	Cu5tm2
7	Material costs in the Branch Office 1	8000	7569	01.02.2015	Cu5tm3
8	Material costs in the Branch Office 1	8000	8965	01.03.2015	Cu5tm1
9	Material costs in the Branch Office 1	8000	8562	01.03.2015	Cu5tm2
10	Material costs in the Branch Office 1	8000	6598	01.03.2015	Cu5tm3
11					
12					

Fig. 33. ODBC Data Source (Excel file, xls)

First, we need to create an ODBC data source in the operating system. Click **Start** - > **Control Panel** -> **Administrative Tools** -> **ODBC Data Sources (32-bit)** (Fig. 34).

ODBC Data Source Administrator (32-bit	:) ×
User DSN System DSN File DSN Drivers Tracing Connection Pooling About	1
User Data Sources:	
Name Platform Driver	Add
	Remove
	Configure
An ODBC User data source stores information about how to connect to the User data source is only visible to you, and can only be used on the current stores information about how to connect to the current stores informatin about how to connect to the current stores in about how to conne	indicated data provider. A t machine.
OK Cancel	Apply Help

Fig. 34. Adding ODBC data source in the operating system

On the **User DSN** tab add a data source.

Click **Add** button and select the driver of the program, where data source was created (Fig. 35). Since we take data from xls-file, choose Microsoft Excel Driver (\*.xls). Then click **Done**.

C	reate New Data Source	X
	Select a driver for which you want to set up a data so Name Driver da Microsoft para arquivos texto (*.bt; *.csv) Driver do Microsoft Access (*.mdb) Driver do Microsoft Base (*.dbf) Driver do Microsoft Paradox (*.db ) Microsoft Access Driver (*.mdb) Microsoft Access-Treiber (*.mdb) Microsoft dBase Driver (*.dbf) < Ⅲ	Unce. V ∧ 6 ≡ 6 6 6 6 6 6 6 6 6 6 6 6 6 5 >
	< Back Finish Car	ncel

Fig. 35. Selecting Microsoft Excel

Enter the following settings in the appeared window:

- Data Source Name name that will be displayed in the list of ODBC sources.
- Version in this field select Excel 97-2000 or Excel 97-2003.
- **Select Workbook** ... use this button to select a file (Fig. 36).

ODBC Microsoft Excel Setup	X
Data Source Name: Material costs	ОК
Description:	Cancel
Database	Help
Version: Excel 97-2000 V	
Workbook:	
Select Workbook	
Use Current Directory	Options>>

Fig. 36. Selecting the data source

Then Click **OK**. Thus, ODBC data source is created in Windows. To create a connection in ELMA Designer set the cursor over **ODBS Data Sources** option and clicking on the shortcut menu select **New** (Fig. 37).

Menu Organizational Structu	ure Processes	Objects [	Document Management	Projects	KPI	Reports	Interface	BPM Apps	Scripts	Publishing	Style 👻	MAX (?)
Save Check Actions												
Model Management												
S KPI												
🖧 Goals												
Responsibility Matrices												
Collect Data												
<ul> <li>□ Data Sources</li> <li>□ Scripts</li> <li>□ ODBC Data Source</li> <li>□ ELMA Tasks</li> </ul>			4									
🛞 Scheduler Tasks			٩									
							A	A				

Fig. 37. Selecting ODBC source in ELMA Designer

In appeared dialog box you have to create ODBC data source and set the parameters (Fig. 38). To select the source click the button with a green triangle. In the **Query** field the worksheet has a default name of **Sheet1**. If there is a different name, it must be corrected.

					-			
Settings Loading Table								
Name *	Material costs	ŝ						
Data Source *	DSN=Materia	al costs					v	
Query							_	
	Select * from	Select *from "Sheet1\$"						
		φ						
	Errors Con							
	Desc	ription		Source	SQL e	тог		

Fig. 38. General parameters for ODBC source configuration

To check the query execution, click the 🥯 button on the **Settings** tab (Fig. 38):

Go to the Loading tab, and do the following:

- From the drop-down menu select **Loading multiple KPIs**, as our table summarizes the data on several KPIs;
- In the **Select Column** field choose the name of a column in a table that contains the names of KPIs;

It is necessary to match the column names of the loaded file with the parameters:

- Plan select Plan from the list;
- Fact choose Fact from the list;
- **Date** select **Date** form the list;
- **Responsible/Row element** choose **Row** from the list.
| Settings Loading Table<br>Indicator<br>Loading multiple KPIs |              |        |
|--|--------------|--------|
| Select Column  | Indicator na | ame 💌  |
| Data   |              |        |
| Plan   |              | Plan   |
| Fact   |              | Fact 🔹 |
| Date   |              | Date 🔹 |
| Responsible/Row Elem   | ent          | Row    |
|  |              |        |
|  |              |        |
|  |              |        |

Fig. 39. Data Load Parameters

When all the parameters are set, click the **OK** button. Clicking (import data) button on the **Settings** tab (Fig. 38) will import all the data from the file into the system.

#### 3.1.2.3 Connection between KPIs and business process indicators

Another way to get a value of the KPI - link the business process indicator to **ELMA KPI** indicator. You can find information about business processes indicators and metrics in the **ELMA BPM Platform** User Manual Manual and in **ELMA Help**.

Let's assume that there was a business process created previously in the legal department, such us **Courtroom Representation**. This process defines the **Total number of legal cases** metric value.

To ensure that these values are displayed in **ELMA KPI**, you should do the following:

- In the list of KPIs create the indicator that will be linked to business process metric. Data type and periodicity of these indicators must match.
- Select the process indicator on the **Metrics and KPIs** tab and select **Link to KPI** in the shortcut menu (Fig. 40).

Process List Courtroom Repr	esentation * 😣				
움 Graphic Model  Context 🔝 R	esponsibility Matrix 🕥	Metrics and KPIs (a) Forms			
		Process Instance KF	Pls		
Name	Туре	Calculation Rule			
Number of the legal cases	Technical (Integer)				
		Process KPIs			
Name	Туре	Calculation Rule		Period	Linked to KPI (KPI)
S Legal cases	Technical (Intege	Add Process Instance KPI Add Process KPI Edit Delete Up Down Activate Deactivate Link to KPI Delete Link to KPI	pletion-calculate using a formula ,,,	Month	Total number of legal cases

Fig. 40. Using Link to KPI command

• The window for selecting KPI indicator displays published KPI indicators. You must select the one you need to link to (Fig. 41).



Fig. 41. Selecting KPI

• Linking indicators in **ELMA Designer** will automatically open the KPI page. Go to the **Values** tab. **Fact Value Collection** method will be defined as **Automatic collection**. **Formula** block will display the name of the process that you used for data collection (Fig. 42).

📎 Total number of legal cases 🔇	3			
Common Values 🚨 Responsit	pility Matrix (0) Influences			
Scale				
Scale		<b>•</b>		
			Plan	
Color	0	50%		
		From plan		
Performance	0%		100%	
	0.70		<u>100/20</u>	
Default Values				
Plan		Fact	0	
		1001		
Fact Value Collection				
Value Collection Method	Manual Collection	Automatic Collection     O Scri	pt	
Formula	The data are imported f	rom the "Workflow: module.Process: "Courtro	oom Representation", KPI: "Legal Cases"	^
				~
Plan Value Collection				
The same as the fact				
Value Collection Method	Manual Collection	O Automatic Collection O Scri	pt	
Formula				

Fig. 42. Relationship between KPI and business process indicator

Similarly, let's link following metrics to the process:

- Number of disputes;
- Disputes settled out of court;
- Favorable judicial decisions.

For more detailed information on indicator and metric processes, see **ELMA BPM Platform** User Manual Manual and **ELMA Help**.

### 3.1.3. Scheduler Tasks

Process of assigning **ELMA** tasks to enter KPI values and to import data from ODBC source can be started automatically on a schedule. To do this you can use the scheduler. Move the cursor to the **Scheduler Tasks** and select **Create** from the right-click menu (Fig. 43).



*Fig. 43. Creating a scheduler task* 

Fill in the required fields in the appeared window:

- Name write Monthly data entry;
- On the left check the **Every month** checkbox;
- Tick the **Select all months** box and indicate 1 working day as the initiation day (Fig. 44).

0		Create Task	×
Common (Tasks {0}			
Parameters     Once     Every day     Every day	Name Start	Monthly data entry           1 /1 /2016         9:00:00 At •	
Every week     Every month	Start Date	1 ਦ 🛛 working days	Select all months
	<ul> <li>✓ January</li> <li>✓ February</li> <li>✓ March</li> <li>✓ April</li> </ul>	<ul> <li>✓ May</li> <li>✓ June</li> <li>✓ July</li> <li>✓ August</li> </ul>	<ul> <li>September</li> <li>October</li> <li>November</li> <li>December</li> </ul>
Additional Parameters		-	
Repeat task every		10 - Minutes - complete	e until 11:59 Pt
🗆 Finish 🗾 📝	/ 💌	: : <b>A</b>	
Enabled			
			OK 🔞 Cancel

*Fig. 44. Creating a schedule* 

• Then switch to the **Tasks** tab and clicking on **Add** button check the boxes over the task created earlier and over the ODBC data source (Fig. 45);

Ø	Select a data source	-		×
	Data Sources Scripts ODBC Data Sources Material costs ELMA Tasks Collecting data about requ	uests an	d com	plaints
	🥝 ОК		🛛 Ca	incel

Fig. 45. Selecting the tasks

• Check the data, and then click **OK** to create the task.

From this point on (after the KPI model is published) secretary will get the task on the first day of each month. And data from the Material costs.xls will be loaded into the system.

#### 3.1.4. Publishing the changes

**Save** button allows saving changes of the model only in **ELMA Designer**. To make these changes effective and to let the users of the **Web Application** start working with the new model, you should publish it.

To publish the changes you need to choose **Publish** option clicking on **Save** button (Fig. 46).

Menu Organizational Structure Processes Obj	ects Document Management	Projects KP	Reports	Interface	BPM Apps	Scripts	Publishing	Style 🝷	MAX 🕐
Save Check Actions									
⊡ () KPI	A								
🖶 🗁 Production									
- M Level of Customer Satisfaction									
Wumber of service requests									
Attributable profit	=								
🗐 - 🔄 Legal department									
🕀 🕥 Out-of-Court Settlement									
Image: Successful judicial proceedings	_ ∢								
Human Resources									
Branch offices	-								
🖧 Goals									
2 Responsibility Matrices									
🧻 Collect Data				A					

Fig. 46. Publish button

If there is no errors in the model, you will see publication window that displays the version number. In the **Comments** field, you can add a disclosure to the published version (Fig. 47). Click **OK** button to confirm the publication.



Fig. 47. Publishing a model window

After a time you will receive notification on a successful publication (Fig. 48). You can start to work now with the model in the **Web Application**.



Fig. 48. Notification on successful publication

#### 3.1.5. KPI display

After KPI model is published, you can check it in the **Web Application**. User group and KPI configurations define the access to the list of KPIs. To have a full access to the list of all KPIs you need to login the system under the user that is a part of **KPI Configuration** group.

Use admin account to log in and select KPI item from the left menu (Fig. 49)



Fig. 49. KPI section in the left-hand menu

It will open the home page of **ELMA KPI** with colored blocks. Choose KPI portlet and click on the **KPI** block (Fig. 50).

Jan 21 Thursday		Administrator
🕥 крі	Thursday, January 21, 2016	← January 2016 →
Start		& Me
🔔 Me 🙏 Goals	My KPIs Plan + Fact	My Responsibilities My Responsibilities My Performance
Dashboards Company	KPI Marks	
2 Employees	<	
🧼 Edit 📝 Matrix Templates		

Fig. 50. **ELMA KPI** home page

After that, you will see a full list of indicators (according to access permissions). List is maximized by default. If you need you can minimize it to any level specifying that level in the corresponding box (Fig. 51).

KPI List				<b>-</b> Janua	ry 20	16 ->
				Level: 3	~	Items found: 20
Indicator				Fact	Status	
😑 늘 Production						
E State of Customer Satisfaction	Month	January	95.00 %	92.07 %		-1% 👃
Number of service requests	Month	January		5,359 pcs.		12.68% 🕇
Number of complaints	Month	January		425 pcs.		15.8% 🕇
E S Gross profit	Month	January	€ 152,800.00	€ 148,750.00		16.76% 🕇
Sevenue	Month	January		€ 271,800.00		8.2% 🕇
💊 Payroll budget	Month	January		€ 50,000.00		-9.09% 👃
Material cost	Month	January	€ 69,000.00	€73,050.00	-	6.17% 🕇
Material costs in the Branch office 1	Month	January	€ 24,000.00	€ 22,330.00		-1.73% 🔱
Material costs in the Branch office 2	Month	January	€ 12,000.00	€ 15,820.00	-	25.76% 🕇
Material costs in the Branch office 3	Month	January	€ 15,000.00	€ 16,000.00	-	8.84% 🕇
Material costs in the Branch office 4	Month	January	€ 18,000.00	€ 18,900.00	-	0.53% 🕇
😑 늘 Legal department						
Out-of-Court Settlement	Month	January	75.00 %	35.00 %	-	-2.78% 👃
Number of disputes	Month	January		10 times		-9.09% \downarrow
♦ Disputes settled out of court	Month	January		5 times		25% 🕇
Successful judicial proceedings	Month	January	70.00 %	66.00 %		24.53% 🕇
📏 Total number of legal cases	Month	January		5 times		-44.44% 👃
Sudicial decisions favorable to the company's interest	Month	January		4 times		33.33% 🕇

Fig. 51. Selecting the expansion level

You can export the list of KPIs to Excel. To do this you can use respective buttons at the top of the page (Fig. 52).

Jan 21 Thursday	Expand All	Collapse All	Export to Excel
KPI	KPI List		
Start			

Fig. 52. Top menu bar

Clicking the KPI name will open an indicator page.

#### 3.1.5.1 KPI page

KPI's page displays all necessary information about the KPI. Let's open **Material** costs in the Branch Office No.1 that was created earlier (Fig. 53).

← Back	Add to Favorites	Ask Question	Add Comment						2	Administr	ator	0
훮 Mate	erial cost	s in the Bra	nch office	1				•	🗕 Febr	uary 201	6 →	<b></b>
Properties	Measuring	Change History	Depends on	Enter Values	Enter Pers	sonal Values						
5	2		€	22,625	5.00 <sup>9</sup>	26000 24000 • 22000		/			•	_
Deepone	eible		Value	e for January: 📢	E 22,330.00	20000		Ţ				
Foster B.				Trend:	1.32% 🕇	16000						
				Updated:	5 hours ago	14000 12000 10000						
User		P	lan	Fact Status	Trend	8000						
👤 Муе	ers J.	€ 8,000	.00 € 7,2	200.00 😑	-5.01% 👃	6000						
Ros	s A.	€ 8,000	.00 € 7,8	856.00 😑	20.86% 🕇	4000						
Voo	od C.	€ 8,000	.00 € 7,5	569.00 😑	-8.25% 👃	2000						
- Show	Additional Attr	ibutes				Septern	ber O	ctober Nov	ember De	cember J	anuary	February

Fig. 53. Material costs in the Branch Office No.1 page

At the right there is a flow chart that shows us how personal fact values change for six months.

At the left – data of the period selected in the KPI settings (in this case – month), current fact value, the trend compared to the previous period and personal values of employees with status indicators.

To view the dynamics of change in the personal values, you can click on the name of the employee you are interested in. The points on the graph and status indicators have the following color scale:

- Green shows that KPI values are lower than planned (because the scale of the indicator is set to decrease). The scale and value ranges were set in ELMA Designer when configuring KPI in the Values tab (section 3.1.1.2 Personal KPIs);
- Yellow acceptable state of the indicator (admissible deviation from the planned values that has not reached the critical values);
- Red the state that shows unacceptable deviations from the planned values (beyond the critical values).

Planned values on the chart are marked with a pale shade of blue.

Personal value is marked in bold, calculated as the sum of personal values (it was defined previously in settings).

Using the top menu bar options you can add a KPI to the favorites for a quick access, ask a question or leave a comment (Fig. 54).



Fig. 54. KPI top menu bar

Questions and comments are displayed in the bottom of the KPI page (Fig. 55).



Fig. 55. Comments to the KPI

In the **History** tab you can see what changes were made, who made them and when. (Fig. 56). All the values of the indicators are colored.

Material cos	ts in the Bra	÷	January 2	016 ->				
Properties Measuring	Change History	Depends on	Enter Values	Enter P	ersonal Values			
Period	Plan	Fact						
🗄 August 2015	€ 24,000.00	€ 20,000.00						
September 2015	€ 24,000.00	€ 24,125.00						
October 2015	€ 24,000.00	€ 21,310.00						
November 2015	€ 24,000.00	€ 25,863.00						
					Ву	On	Fact	Comment
					Administrator ELMA	1/22/2016 11:55:30 AM	€ 25,863.00	
December 2015	€ 24,000.00	€ 22,722.00						
January 2016	€ 24,000.00	€ 22,330.00						
February 2016	€ 24,000.00	€ 22,625.00						
						Page generated I	n 225 ms ELMA v. 3.8.2	23878 R.afb16e9b6

Fig. 56. Change History

KPI value can be calculated using values of other indicators. In that case you can go to the **Depends on** tab to see which indicators and metrics were used in formula. Thus, you can see all KPIs used for calculation of **Level of Customer Satisfaction** (Fig. 57). Clicking any of them opens indicator's page.

	• • • • •	ember 20	ID 🔰 🔢
Properties Measuring Change History Depends on Enter row values			
Indicator	Period	Plan Fact	Status Trend
Proper Value			
Number of service requests	December	1,256 pcs.	32.21% 🕇
Number of complaints	December	105 pcs.	-30% \downarrow
Personal/Row Values			
Number of service requests	December	1,256 pcs.	32.21% 🕇
Number of complaints	December	105 pcs.	-30% 👃

Fig. 57. Metrics used to calculate Level of Customer Satisfaction

On the **Enter row values** tab you can fill in KPI values manually, if it is allowed by the settings. Let's open **Material costs in the Branch office 1** KPI and see this tab (Fig. 58).

🚱 Material costs in the Branch office	e 1		← Dec	ember 2015	5 🔶 📼
Properties Measuring Change History Depends on	Enter Values	Enter Personal V	alues		
Period		Fact	Comment	Plan	Comment
2015					
Half Year 1					
Quarter 1					
January		17 980,00 €		24 000,00 €	
February		19 580,00 €		24 000,00 €	
March		20 150,00 €		24 000,00 €	
Quarter 2					
April		19 630,00 €		24 000,00 €	
May		18 960,00 €		24 000,00 €	
June		19 740,00 €		24 000,00 €	
Half Year 2					
Quarter 3					
July		19 900,00 €		24 000,00 €	
August		20 000,00 €		24 000,00 €	
September		24 125,00 €		24 000,00 €	
Quarter 4					
October		21 310,00 €		24 000,00 €	
November		25 863,00 €		24 000,00 €	
December		22 722,00 €		24 000,00 €	

Fig. 58. Enter values for Material costs in the Branch Office No.1

**Plan** column values can be changed manually by clicking on them. The **Fact Values** are calculated according to the formula. It means that you can change it only by changing the values involved in the calculation. Font of the values that can not be changed or entered manually is black.

On the **Enter Personal Values** you can add or correct values for each element of the KPI row (Fig. 59).

← Back	Add to Favorites	Ask Question	Add Comment					2	Administrat	or 💌 📀
😋 Mate	Material costs in the Branch office 1 ← December 2015 → 📼									
Properties	Properties Measuring Change History Depends on Enter Values Enter Personal Values									
		Row Element			Period	Fact	C	omment	Plan	Comment
👰 Myers J.				December	7 052	00€		8 000,00 €		
👰 Ross A.				December	7 856	00€		8 000,00 €		
Real Wood C.			December	7 814	00€		8 000,00 €			

Fig. 59. Entering personal values

Revise some personal values of the **Material costs in the Branch office 1**. To do this, double-click on 7 810 euros in the Wood.C record and enter a new value of 7 814.

Thus, as you see, a user with appropriate access permissions can adjust KPI values in **Web Application** in manual mode.

# Chapter 4. Performance matrices

**Performance matrix** – is a system element designed to control employees' performance. It comprises a set of KPIs, SMART tasks and marks.

A member included in the **KPI Users** group can go to the performance matrix page considering the following path from the home page: **KPI**  $\rightarrow$  **Me**  $\rightarrow$  **My performance**.

	e Back	Add Task	Send for Approval	? Ask Questi	on Add Com	nent Print E	xport to Excel		2	Smith J.
Pe	Performance Matrix ← January 2016 →									
P	erformance					82.58%	90 80			82.58
Ξ	KPI	Weight Coefficie	ent 85%	Plan	Fact	Performance: 82.58%	70			
0	Attributable profit		45%	€ 152,800.00	€ 148,750.00	97.35%	60			
0	Level of Customer Satisfaction		40%	95.00 %	92.07 %	96.92%	50 40 <b>37.9</b>	a) 40	3	9.16
Ŧ	SMART Tasks	Weight Coeffic	cient: 0%	Plan	Fact	Performance: 0%	30 20			
Ξ	Marks	Weight Coefficie	ent 15%	Plan	Fact	Performance: 0%	10			
5	Staff Performance Evaluation		15%	100.00 %	0.00 %	0%	0 October	Noven	nber Dec	cember January
	E Comments	<b>Questions</b>	Ø Att	achments	Actions	Sort by Date	e			

Fig. 60. Performance matrix example

To the right of the performance evaluation you will see a  $\bigcirc$  button. Clicking on this icon adds **Performance Weight** column. This column shows the KPI ratio in the overall efficiency that depends on weight coefficient (Fig. 61).

Pe	Performance Matrix							
Pe	rformance					<u>82.58%</u>		
	KPI			Fact	Performance: 82.58%	Performance *Weight		
	Attributable profit	45%	€ 152,800.00	€ 148,750.00	97.35%	43.81%		
	Level of Customer Satisfaction	40%		92.07 %	96.92%	38.77%		
	SMART Tasks	Weight Coefficient: 0%		Fact	Performance: 0%	Performance *weight		
	Marks	Weight Coefficient: 15%	Plan	Fact	Performance: 0%	Performance *weight		
5	Staff Performance Evaluation	15%	100.00 %	0.00 %	0%	0%		

Fig. 61. Performance Weight display

Performance matrix is generated automatically every month. For each employee system uses the template that corresponds to his job position or user group.

At the beginning of the month, employee needs to open his performance matrix, to have a look at the current performance plans and, if necessary, to determine SMART tasks. Also, if the template is set properly, employee can submit performance matrix for approval.

At the end of the month you will be able to see actual values of the KPIs (in accordance with calculation or data entry settings). Employee should review the actual values and report on the current task.

If it is allowed by a template, employee can send performance matrix to the control.

Creating a template is available to users that are the part of the **KPI:Settings** or **KPI:HR-department** groups.

## 4.1 Performance matrices templates

When we developed the model (see **Chapter 2**), we formulated estimation criteria. These criteria form a basis for performance matrix. Let's create a template for one of the performance matrices - for Production manager. Clicking **Matrix Templates** on the left menu opens the page with the list of templates for performance matrices (Fig. 62).

Jan 22 Friday		Administrator
NPI KPI	Friday, January 22, 2016	← January 2016 →
Start	© KPI Q. My KPIs	Me     My KPIs     My Responsibilities     My Responsibilities
Company	Plan + Fact KPI Marks	
Matrix Templates		Page generaled in 404 ms ELMA v. 3.8.2.23878 R.ab16e3665611

Fig. 62. Selecting Matrix Templates option

Then, on the top menu click on **Add template** button (Fig. 63).

Back Add Template		Administrator
Settings - Perform	mance Matrix Templates	← January 2016 →
		V 2 Q Search
Template Name	Executors	
No data to display		

Fig. 63. Adding matrix template

On the appeared page, type Head of production in the Name field (Fig. 64).

Jan 22 Friday	Save Cancel	Add KPIs Add Job Position KPI	Administrator
	Create performance	matrix template	← January 2016 →
Start	Name *	Head of production	
💿 крі	Periodicity	Month	
L Gerle	Employees (Groups)	★ ♣ Head of Production	
	Approval	Enable	
U Dasriboards	Control	Enable	
Company	Scale	Enable	
😡 Edit	Performance		
😿 Matrix Templates	КРІ	Enable	
	SMART Tasks	Enable	
	Grades	Enable	
	Time Report	Enable	
	Performance Rating	Enable	
	Use by default	🔘 Yes 💽 No	

Fig. 64. Performance matrix template

To select a job position, click **Add** button in the **Employees (groups)** section. In the appeared window, select **Organizational Structure Element** and check the **Head of production** box. (Fig. 65). Then click the **Selec**t button at the bottom of the window.

	Select an executor
User Organizational Structure Element Group	CEO  Head of Human Resources and Administration  Head of Finance  Executive Director  Head of Production  Legal Department  Secretary

Fig. 65. Selecting an executor for matrix template

This template will be used for all employees included in the **Employees** group. If you try to create another matrix for the same employees, system will generate a warning and will not allow you to save it.

Check the **Enable** box to add the **Scale**. (Fig. 64). This will add an indicator of the efficiency status that depends on overall percentage.

Then, check the **Enable** box to add the KPIs (Fig. 64) and select Level of Customer Satisfaction and Gross profit.

Select KPIs	×
Production	
💷 🚱 🗹 Level of Customer Satisfaction	
🗄 💿 🗹 Gross profit	
📮 🖿 Legal department	
🖮 💿 🔲 Out-of-Court Settlement	
🖮 💿 🔲 Successful judicial proceedings	
Human Resources	

Fig. 66. Selecting KPI for performance matrix

Click on 0% on the right of the figures, and then set **Gross profit** to 45% and **Level** of **Customer Satisfaction** to 40%. This section displays the weight KPIs have in the overall efficiency assessment. Setting a higher weight to the **Gross profit** indicator increases its importance in the overall assessment. Thus, we have determined what KPIs will be involved in the efficiency calculation and what weight will be used (Fig. 67).

KPI	🕑 En	able		
		KPI	Weight Coefficient: 85%	
	$\odot$	Gross profit	45%	×
		Level of Customer Satisfaction	40%	×
	-	Add KPIs 🔶 Add Job Position KPI		

Fig. 67. Determining weight coefficient

Check the **Enable** box to add **Grades** (Fig. 64) and click on **Add grade**. In the appeared window, specify the name to the assessment and using the **Add** button select the supervisor who will evaluate the activity of the employee (Fig. 68).

	Add Grade	×
Name *	Staff Performance Evaluation	
Description		
Periodicity	Month	
Measurement Unit *	Percents	~ <b>Q +</b>
Assessed By	★ 🚠 Executive Director + Add	
		Add Cancel

Fig. 68. Adding grade

Set the weight coefficient to 15%.

From the moment the template is saved the CEO (Chief Executive Officer) will automatically receive the staff evaluation task on the first day of each month (Fig. 69).

Completed Start Execution Cannot Execute Actions	Smith J.
Evaluate Staff Performance	
About Task	
End Date       from 1/22/2016       till Today (1/22/2016)         Comments       Questions       Attachments       Actions       Sort by Date         Task created (1/22/2016 5:36:15 PM)	Author         Image: System         Image: System         Executor         Image: Smith J. Executive Director
	Date created 1/22/2016 5:36 PM Status O New

Fig. 69. Staff evaluation task

Thus, we selected the elements used for estimation of the Head of Production performance. If the goal is achieved and evaluation grades are high the value will be equal to 100% (all the weights add up to 100%).

In order to save the template click the **Save** button on the top of the page.

Besides indicator values and expert opinions you can also add SMART tasks and evaluation of the schedule compliance.

SMART task is an acronym that gives characteristic for what makes the task effective:

- S Specific;
- M Measurable;
- A Achievable;
- R Relevant;
- T Time-limited.

SMART task is a special task assigned for a certain period (month) to the employee and aimed at assessing the extra-efforts or additional work activity that affects the calculation of the efficiency evaluation.

Evaluation of the schedule compliance is based on the ratio of the number of tasks that were completed during a month to the total number of tasks set for the past month.

Let's customize the template for the performance matrix of the Head of Legal Service (Fig. 70):

Create performance m	natrix template	← January 2016 →				
Name *	Head of Legal					
Periodicity	Month					
Employees (Groups)	× 井 Head of legal ┿ Add					
Approval	Enable Approval type	• Job position / User O Business process				
	Approver 🗶 🚠 CEO					
Control	Control Type	<ul> <li>Job position / User</li> <li>Business process</li> </ul>				
	Supervisor 🗙 🚠 CEO					
Scale	✓ Enable	50 90				
Performance						
KPI	C Enable					
	КРІ	Weight Coefficient: 60%				
	Out-of-Court Settlement	35% 🗙				
	Successful judicial proceeding	js 25% 🗙				
	🕂 Add KPIs 🕂 Add Job Posi	tion KPI				
SMART Tasks	<ul> <li>Enable</li> <li>Specify weight coefficients for tasks</li> </ul>	Manually				
	<ul> <li>Limit weight coefficient value</li> </ul>	40 % Forbid to exceed the weight coefficient value				
	Supervisor	+ Add Allow to change the SMART task supervisor				
Grades	Enable					
Time Report	Enable					
Performance Rating	Enable					
Use by default	🔾 Yes 💿 No					

Fig. 70. Matrix template for the Head of Legal

By setting these parameters in the template, you ensure that the Head of Legal is able to create a single or multiple SMART tasks. The system will check that the sum of the weights of all the tasks do not exceed 40%.

Create performance m	← January 2016 →	•	
Name *	Secretary		
Periodicity	Month		
Employees (Groups)	× ♣ Secretary + Add		
Approval	Enable		
Control	Enable		
Scale	C Enable		
	50 90		
Performance			
KPI	Enable		
SMART Tasks	Enable		
Grades	C Enable		
	Marks	Weight Coefficient: 50%	
	Staff Performance Evaluation (by CEO)	50%	×
	+ Add Grade		
Time Report	Enable		
Performance Rating	C Enable		
	Weight coefficient 50 %		
Use by default	Yes • No		

### Performance matrix template for the secretary will be as follows:

Fig. 71. Matrix template for the Secretary

# 4.2 Using performance matrices

Use the Head of Legal account to log in. Then, open the main page and click on **My Performance** (Fig. 72).

Jan 22 Friday		👤 🤎 🖾 👼 🥥 🌞
🕥 крі	Friday, January 22, 2016	← January 2016 →
Start	S KPI	🚨 Me
🔔 Me		
🛵 Goals	My KPIs Plan + Fact	My Performance 20.5 /0
() Dashboards	KPI Marks	

Fig. 72. Selecting performance matrix page

On the appeared page (Fig. 73), using the **Add SMART task** button create monthly tasks for the Head of Legal:

- Develop the criteria for evaluating complexity of the cases;
- Develop a standard form of contracts with partners.

You can also add a task from the starting page.



Fig. 73. Adding SMART task

Fill in the required task parameters (Fig. 74).

	Create New SMART Task	×
Control Approver	Co-Executors	
Subject *	Develop the criteria for evaluating complexity of the cases	
Result *	List of criteria Word	
Executor *	Mitchell Paul (Head of legal) 🗸 💄	
Weight coefficient	20.0 Weight coefficient of active tasks: 0%; Maximum: 40%	
Period	January 2016 Specify End Date	
Completion Check	<ul> <li>Yes O No Carter Jose (CEO)</li> <li>Yes O Completion Check</li> </ul>	~
	Notify me when the task is completed  Yes O No	
Approver	✓ <sup>▲</sup>	
Category	✓ Q	
Description		
	Attached Files Attached Documents	
	Load Files (not more than 1000 MB)	
	You can load a file by dragging it to this area	
	Save	Cancel

Fig. 74. SMART task parameters

In the **Subject** field you need to enter the name of the task and in the **Result** field you need to describe what you expect to get after the completion of a task.

In the matrix template we have determined the total weight of SMART tasks – which is 40%. Now set the weight of each task to 20%. If you want to add weight to a particular task, you can divide the total weight coefficient. For example, you can make a proportion of 25% and 15%.

Click the **Save** button at the bottom of the window for adding SMART tasks.

## 4.2.1. Approving the matrix

When you are making the settings for performance matrix approval, you should forbid the executor to change it from the moment of approval and for the period of execution. After getting the matrix approved, executor will no longer be able to add or remove SMART tasks or change their weight.

To send it for approval click **Send for Approval** button on the top menu of the matrix page (Fig. 75).



Fig. 75. Sending the matrix for approval

Since template settings define CEO as an approver, performance matrix will be sent for approval to that user. Now, if we sign in to the system as CEO, we will find the task to approve the matrix of the Head of Legal (Fig. 76).

er Back	Approve	Reject	Start Exect	ition Ac	ctions			2	Carter J.
Approve	Approve a performance matrix - Mitchell P. January 2016 - January 2016 -								
About Task									
End Date from 1/25/2016 🖸 till 1/31/2016 🖸								Author Mitchell P. Head of legal	2
Pending	Approval : Ca	rter J.						Executor	
Performar	nce					<u>60%</u>	0	Carter J. CEO	?
🗉 KPI	V	Veight Coefficient: 6	i0% I	Plan F	Fact	Performance: 60%		Date created	
<ul> <li>Out-of-O Settlem</li> </ul>	Court ent	3	5% 35.0	0 % <b>35.00</b>	0 %	100%		1/25/2016 12:15 PM Status	
<ul> <li>Success proceed</li> </ul>	sful judicial lings	2	5% 66.0	0 % 66.00	0 %	100%		🙁 New	
SMART	Tasks 40% V	Veight Coefficient: 4	0% 1	Plan F	Fact	Performance: 0%			
of pevelop for evalu- complexi cases	the criteria ating ty of the	:	20%		0 %	0%	×		
Sevelop form of c partners	a standard contracts with	:	20%		0 %	0%	×		
+ Crea	te New SMART	Task							

Fig. 76. Matrix approval task

Approver can edit the list of SMART tasks.

If performance matrix was not approved executor will get a notification in the messages feed (Fig. 77).

Messag	jes	
	Mitchell P. January 2016 Performance Matrix from: Mitchell P.	() 01/01/2016 12:00 AM
	Carter J. O The matrix is rejected	① Today 01/25/2016 12:20 PM

Fig. 77. Rejection notification

In this case, executor can adjust SMART tasks and send matrix for reapproval.

If the matrix has been approved, information about it will appear on the matrix page (Fig. 78).

Pe	Performance Matrix							
Ø	S Approved : Carter J. (1/25/2016 12:28 PM)							
P	erformance				<u>60%</u> >>>			
Œ	KPI	Weight Coefficient: 60%	Plan	Fact	Performance: 60%			
E	SMART Tasks 40%	Weight Coefficient: 40%	Plan	Fact	Performance: 0%			
C	Develop the criteria for evaluating complexity of the cases	20%		0 %	0%			
C	Develop a standard form of contracts with partners	20%		0 %	0%			

Fig. 78. Approval icon

Approver and supervisor of the executor are able to edit performance matrix even after approval. To modify the matrix select the **Employees** section on the left menu of the **ELMA KPI** home page. Then click the **Show details** button on the top menu of the **Employees** page.

After that, in the lower right corner of the approved performance matrices you will see the **Start Adjustment** link (Fig. 79). Clicking this link gives an opportunity to edit the list and weight of the SMART tasks.

<b>e</b> Ba	ck	1 co	lumn	2 columns		Show D	etails	Users with Matrice	h no		
My Employees											
			Mitcl	nell P. ( g	o to	o mati	rix )				
			Cr Ac	eate Task Id Comment	?	Ask Qu	estion				
0	Approved	l : Car	ter J. (1/2	5/2016 1:27	PM)						
Pei	rforman	ice								9	<u>60%</u> 📎
	КРІ			efficient: 609		Plan	Fact	Р	erform	ance: 6	0%
	SMART Tasks 4	0%	Weight Co	efficient: 409		Plan	Fact		Perfor	mance:	0%
								[	🖌 S	tart Adju	ıstment

Fig. 79. Performance matrix adjustments

#### 4.2.2. Matrix control

Upon completion of work or after the end of the month executor has to submit information on execution of the SMART tasks. Data on actual values is collected in accordance with data collection method.

After you enter all the data in performance matrix, you need to send it for controlling (Fig. 80) so that approver can verify SMART tasks completion and check if the **Plan values** were reached.

$\rangle$	e Back	Send for Controlling	Ask Question	Ad	d Comment	Print	Export to Excel	
Pe	rforman	ce Matr	ix					
0	Approved : Ca	arter J. (1/25	/2016 12:28 PM	)				
Pe	rformance							<u>60%</u> 🔊
8	KPI		ght Coefficient: 6		Plan	Fact	Performan	ce: 60%
-	Out-of-Court Settlement				35.00 %	35.00 %		100%
•	Successful jud proceedings		2			66.00 %		100%
8	SMART Task	s 40% Wei	ght Coefficient: 4			Fact	Performa	nce: 0%
6	Develop the cri for evaluating complexity of th cases	iteria he		20%		0 %		0%
đ	Develop a stan form of contrac partners	idard cts with		20%		0 %		0%

Fig. 80. Sending the matrix for controlling

By default, control will be conducted by an employee that is specified in the template settings (hereinafter - CEO). If necessary, you can appoint another approver from the drop down list (Fig. 81).

Send for Controlling	$\times$
Carter Jose (CEO)	
Start Date	
01/25/2016 Specify time	
End Date	
01/25/2010 Specify time	
Comment	
Send Cance	el

Fig. 81. Controlling parameters

Approver will receive a task. He either can agree with it or reject it (Fig. 82).

Performa	ince matrix con	trol - Mit	🔶 Janua	ary 2016 🔶		
About Task						
End Date	onon Matrix	from 1/25/2016	till To	Author Mitchell P. Head of legal	?	
© Complet	on Check : Carter J.				Executor	
Performar	ice			<u>60%</u> 🔊	CEO	?
🗄 КРІ	Weight Coefficient: 6	60% Plan	Fact	Performance: 60%	Date created	
B SMART Tasks 4	0% Weight Coefficient: 4	40% Plan	Fact	Performance: 0%	1/25/2016 1:05 PM Status	
Develop criteria fo evaluatin complexi the case	the g : y of	20%	0 %	0%	😫 Read	
Cevelop Standard of contra with part	a form cts ners	20%	0 %	0%		

Fig. 82. Performance matrix control

In case of rejection executor will have to make corrections, considering comments of the approver, and inform approver about this. After agreeing, information about employee's performance will be reflected on the page of performance matrix. (Fig. 83).



Fig. 83. Completion icon

The percentage of the employee efficiency is calculated using agreed performance matrix. You can see this ratio in the performance matrix or in the portlet of the home page (Fig. 84).



Fig. 84. Portlet with the performance ratio

Managers and accounting staff can see information about employees' performance in the **My employees** section. You can open this section by clicking the **Company** portlet on the home page of **ELMA KPI** (Fig. 85).

Jan 26 Tuesday		Carter J.
KPI	Tuesday, January 26, 2016	← January 2016 →
Start	S KPI	💄 Me
L Me Goals Dashboards	Q. My KPIs KPI Plan + Fact Marks	My KPis My Responsibilities My Performance
Company	Left Employees	
	My Employees Previous Search	Goal Maps     Activities     SMART Tasks       Image: Ima

Fig. 85. Link to the All Employees page

Using efficiency data (Fig. 86) accountant can calculate payment amount.

All Employees	← October 2015 → 📼
	✓ L → ✓ Q Search ⊗
	Quantity: 15 🗸   Items found: 15   Pages: 1
Clark R. (go to matrix) Accountant Create Task Ask Question Add Comment	Mitchell P. (go to matrix) Head of legal Create Task Ask Question Add Comment
Performance 37.9%	Performance 60%
KPI Weight Coefficient: 85% Plan Fact Performance: 37.9%	E KPI Weight Coefficient: 60% Plan Fact Performance: 60%
BMART Weight Coefficient: 0% Plan Fact Performance: 0%	SMART Weight Coefficient: 0% Plan Fact Performance: 0%
Marks Weight Coefficient: 15% Plan Fact Performance: 0%	

Fig. 86. Data on employees' efficiency

# Chapter 5. Dashboards

**Dashboard** - is a portlet that displays main information on KPIs values. It allows users to see the dynamic pattern, to perform ongoing monitoring and to correlate values with each other. Information can be displayed in charts, indicators or tables. You can add dashboard to the main page.

The advantage of these panels is that they allow you to easily understand the current status of the most important KPIs.

# 5.1 Creating a dashboard

These panels are created in **ELMA Web Application**. Open the **Dashboard** section, located in the left menu of the **ELMA KPI** home page. In the lower right corner of the opened list, click the **Edit** button (Fig. 87)

0	Jan 25	Administrator
N KPI		Dashboards $\leftarrow$ January 2016 $\rightarrow$
Start		No data to display Page generated in 959 ms ELMA v. 3.8.2.23878 R. ab16e9b59511
í КРІ		
🔔 Me		
👃 Goals		
() Dashboards		
		c
	Edit	
de Company		

Fig. 87. Dashboard section of the web-application

Let's create a dashboard for the following KPIs: Material costs, Level of Customer Satisfaction, Successful judicial proceedings and Out-of-court Settlement. To do this, click Add on the top menu of the page and select Create New Page from the drop-down list (Fig. 88).



Fig. 88. Creating a dashboard

This opens a window where you should type the name and select the width of the page (select two columns). Then click **Save**.

Add a link to the page	$\times$			
Name *	_			
Customer Satisfaction and Revenue				
Location *				
Two columns v				
Create or remove columns from the page. Portlets in columns are stacked vertically.				
Save Cance	el l			

Fig. 89. Adding a link to the page

On the next page, click Add Portlet (Fig. 90).

NPI       Customer Satisfaction and ← January 2016 →         Start       Revenue         KPI       Now you are changing the personal settings of the page. To change the common settings, follow this link.         Me       Image: Comparison of the page. To change the common settings, follow this link.         Dashboards       Image: Comparison of the page. To change the common settings, follow this link.         Me       Image: Comparison of the page. To change the common settings, follow this link.         Me       Image: Comparison of the page. To change the common settings, follow this link.         Me       Image: Comparison of the page. To change the common settings, follow this link.         Me       Image: Comparison of the page. To change the common settings, follow this link.         Me       Image: Comparison of the page. To change the common settings, follow this link.         Me       Image: Comparison of the page. To change the common settings, follow this link.         Me       Image: Comparison of the page. To change the common settings, follow this link.         Me       Image: Comparison of the page. To change the common settings, follow this link.         Me       Image: Comparison of the page. To change the common settings, follow this link.         Me       Image: Comparison of the page. To change the common settings, follow this link.         Me       Image: Comparison of the page. To change the common settings, follow the comparison of	Jan 2 Mond	25 lay	<b>←</b> Back	Access	Add Portlet	Administrator
KPI   Me   Goals   Dashboards   My Panels     Now you are changing the personal settings of the page. To change the common settings, follow this link.     Page generated in 1171 ms ELMA v. 3.8.2.23878 R.ab16690656511	KPI Start		Custon Revenu	ner Satisfa Je	ction and	← January 2016 →
Me       Soals       Dashboards       My Panels   Page generated in 1171 ms ELMA v. 3.8.2.23678 R.atb16e36656511	() крі		Now you an follow this li	re changing the pe ink.	rsonal settings o	f the page. To change the common settings,
Oashboards         Image generated in 1171 ms ELMA v. 3.8.2.23578 R.atb16e9b658511	👗 Me					
My Panels     Page generated in 1171 ms ELMA v. 3.8.2.23878 R.alb16e9b65f511	🜔 Dashboards					
	🕢 📄 My Panels					

Fig. 90. Adding a portlet

In the portlet catalog find the section of **KPI Dashboards**. For the **Material Costs** indicator (with the total value) choose **KPI graph**, and click **Add Portlet** (Fig. 91).

Portle	t catalog	$\times$
CRM		-
O kost Deals Review a list of deals	Inpayments     Review a list of inpayments	
C 🔝 Leads Review a list of leads		
FILTERS		
Filter Data     The portlet to show data of the selected filter		
KPI DASHBOARDS		
Bar Chart Displaying KPI changes dynamics for a period	KPI graph Displaying KPI changes dynamics for a period	
Pie Chart Displaying rows/KPIs part for the current period	Row of KPIs     Displaying KPI dynamics for the current period	
ROUTING PROCESSES AND RECORDS MANAGEMENT		
Document Management The home portlets with links to pages and functions of the "Document Management" module	Register documents The portlet for quick registration of documents	
USERS		-
	Add Portlet Ca	ancel

Fig. 91. Selecting KPI graph
Now we should choose the charts that will be displayed on the dashboard screens. Thus, you need to select the KPIs. To do this, click the  $\checkmark$  button on the corresponding portlet (Fig. 92).



Fig. 92. Dashboard settings

In the appeared window click **Add / Remove KPIs** and select following indicators (Fig. 93).

	Portlet Settings	)
🖉 Select KPIs		
Material cost		<b>☆ ×</b>
🚳 Material costs in the Branch	office 1	🗢 🗙
🚳 Material costs in the Branch	office 2	🗢 🗙
🚳 Material costs in the Branch	office 3	🗢 🗙
🔞 Material costs in the Branch	office 4	🗢 🗙
Number of previous periods	5	
Use Previous Period	💽 Yes 🗌 No	
Value Display	⊙ in the diagram ○ pop-up tips	
Advanced		
Auvanceu		

Fig. 93. Adding a KPI

Let's open **Advanced** panel at the bottom of the portlet configuration window and add the name of the graph (Fig. 94). Then click the **Save** button.

✓ Advanced	
Display Settings	
Name	Material costs
Design	Full ~
Advanced	
Forbid to collapse	🔵 Yes 💽 No
URL address of name	
URL address of image	
AJAX Settings	
Enable asynchronous loading	Ves No
Show the update button	🔘 Yes 💽 No
	Save Save and continue Cancel

Fig. 94. Additional settings of the portlet

Similarly, configure other portlets:

- for Level of Customer Satisfaction indicator choose Bar chart portlet;
- for Successful Judicial Proceedings and Out-of-court Settlement select Row of KPIs portlet;
- for Material costs indicator (without total value) choose Pie chart portlet.

# 5.2 Configuring access to a dashboard

To configure accessibility to the created dashboard, sign in to **ELMA** as Administrator. In the **Dashboards** window click **Edit**. Appeared page allows you to edit the list of panels. Move the cursor to the name of the panel you need to edit. Holding down the left mouse button drag the panel to the **Common Dashboards** folder by using the drag-and-drop method (Fig. 95). Thus, we will provide a common user access to this panel.



Fig. 95. Moving the panel to the Common Dashboards folder

Then move the cursor to the name of the panel you are editing and click on the icon with a pencil (Fig. 96).



Fig. 96. Changing the link parameters

In the appeared window, open the **Permissions for the link** tab and delete **All users** item (Fig. 97). Then, using the **Add** button, select job positions that must have an access (in our case it will be Executive Director).

Edit Link to Action						
Link to Action	Permissions for the link	Permission for the page				
	Read	Edit Full				
🗙 🌆 Author		<ul> <li>Image: Image: Ima</li></ul>				
🗙 🌮 All use	ers 💽					
+ Add						
			Save Cancel			

Fig. 97. Changing permissions for the link

In the same way, set the rights to access the page on the **Rights** tab and click the **Save** button.

Thus, only Executive Director and system Administrator are able to open and view created dashboard.

# 5.3 Viewing the dashboards

To view the dashboard in the **Web Application** open the **Control Panel** on the **ELMA KPI** Home page and select the desired panel from the list (Fig. 98).



Fig. 98. List of dashboards

After choosing the one you need, corresponding portlets will appear on the right side of the page (Fig. 99).



Fig. 99. Created dashboards

All charts are interactive. For instance, hovering over any point of the **Material Costs** values displays the actual values for the selected period (Fig. 100). You can see color indicators to the left of the values that display the status - being within the planned value or going beyond it (above / below).



Fig. 100. Pop-up KPI values

Clicking the KPI value opens its page that helps you to explore the details of the selected KPI.

In addition, each user can set up a portlet on the main page of the system, if the access permissions allow it. In this case, all charts necessary for the regular monitoring will appear directly when entering the **Web Application**. For details on setting pages and portlets, see the **ELMA BPM Platform** User Manual Manual or **ELMA Help**.

# Chapter 6. Goal Maps

In addition to the features described in previous chapters (performance management, monitoring of the staff efficiency, monitoring of key values), **ELMA KPI** also allows users to use the goal maps.

Management by objectives, MBO – is a strategy, designed to help the organization to achieve goals and make it focused on achieving concrete results. To establish a hierarchy of goals at all levels of the company and to make sure that tasks and projects are relevant **ELMA KPI** provides:

**Goal maps** – is a tool that helps to visualize the company's strategic objectives. Implementing mind maps makes it possible to inform the executors about strategies;

**Goal** – is the main element of the goal map. All actions and resources are aimed at achieving this goal;

**The main indicator** – is one of the possible parameters that allows user to determine whether the objective is achieved.

**Activity** – action organized by the group of employees or a set of actions aimed at achieving the goals.

**SMART task** – is a special task that leads to progress in achieving the goal. For more information on SMART tasks see sec. **4.1. Performance matrices templates.** 

# 6.1 Creating goal maps

To map the objectives it is necessary to set the cursor to the **Goal maps** in the **ELMA Designer** and select **Create** command form the context menu (Fig. 101)

Menu Organ	nizational Structure	Processes	Objects	Document Managemer
Save Check A	ctions			
Ŧ	-			
Model Manager	nent			
🕥 KPI				
🖧 Goals				
📲 Goal Map	s			
🍼 Goal Tree	e 中 Create			
	Create Folder	r i i i i i i i i i i i i i i i i i i i		
	🖉 Edit Propertie			
	<u> </u>		4	

Fig. 101. Creating a goal map

In the appeared window, enter the **Map Name**. You don't need to select initial goal for created map, since you are creating it for the first time (Fig. 102). **Select Initial Goal** option allows you to choose the goal from already exsiting goals.

<b>()</b>	Enter the goal map name					
Map Name *	2016					
Edit Goal Map	Designer					
Select Initial Goal						
	🔗 ОК 🧯	3 Cancel				

Fig. 102. Creating map window

After you click **OK**, you can edit created goal map in the empty field appeared on the right side of the screen. In this field, you can add necessary goals and create connections between them. Clicking the right mouse button brings up a menu with the list of items available for adding. Select the desired item (Fig. 103):

Create Goal - creates one objective on the map;

**Create Goal Group** - creates a folder where you can further create a set of goals that have a common feature;

**Create Goal Map** - creates an internal (sub) map within the main one.



Fig. 103. Creating goal on the map

In the appeared dialog box (Fig. 104) write the **Name** of the goal. Assign the person **Responsible** for achieving the objectives, selecting him from the drop-down list. Other parameters of the goal can be filled in later.

0	Creating a goal	-	
Common Depends on the	(0) goals (KPIs {0})		
Name *	Select an organizational structure element –		
Description	CEO Head of Human Resources and Administration Head of Finance CEO Executive Director CEO Legal Department CEO Secretary		~
Responsible	🔗 DK 🔞 Cancel		<b>V</b> X
	0	K 🛛	Cancel

Fig. 104. Creating a goal window

Created goals are marked in blue rectangle. You can find them in the list of the goals on the left menu of **ELMA Designer**. Later on, you can create goals by right-clicking on the goal. The same way you can create internal (sub) maps (Fig. 105).



Fig. 105. Map and goal tree

Open the main goal map. As you see, sub map is also blocked in the rectangle yet with a dark outline and blue fill. Likewise, the new map will be added to the list of goals in the left side menu.

**ELMA KPI** module provides advanced capabilities for managing the goal maps. Yet in the **Designer** the access to the projects for certain users is restricted. Thus, the main functions are available in the **Web Application**. To continue to work with created map open **Properties** tab and switch the **Edit Goal Map** slider from the **Designer** position (colored in blue) to the **Web browser** (colored in green) (Fig. 106). Save and publish the model. After that, according to the access permissions user will be able to work with the goal map in the **Web Application**.



Fig. 106. Switching the editing method

# 6.2 Managing the goal map

If the user has appropriate permissions (navigate to **Administration**  $\rightarrow$  **KPI**  $\rightarrow$  **General Access Settings**  $\rightarrow$  **Indicators Control,** where you can check which functions are available to the user groups) he gets an access to the goal maps on starting page of the KPI section in the **Management by goals** portlet. This portlet shows actual number of maps available to the user for viewing and editing. It also shows the actual status of map elements that has to be worked out - Activities and **SMART tasks** (Fig. 107).



Fig. 107. Management by goals portlet

#### 6.2.1. Adding goals to the map

You can create goals in the **Web Application** the same way as you did in **ELMA Designer**. Select desired goal from the list of goals in the left menu. Then right-click on the map field and select the desired item (Fig. 108):

Create Goal - creates one objective on the map;

**Create Goal Group** - creates a folder where you can further create a set of goals that have a common feature;

Create Activity – creates an activity linked to the goal;

**Create SMART task** – creates a SMART task linked to the goal;



Fig. 108. Creating the goal in web-browser

In the appeared window write the **Name**, then set the **Goal Achievement Deadline**, noting the date on the calendar. Afterwards, system will send notifications that it is time to sum up the results. You also should assign the responsibility for achieving the goal. Select the job position from the list of elements of the organizational structure (Fig. 109).

	Creating a goal	$\times$
Name *	Prevent delinquency charges	
Description		
Goal Achievement Deadline	12/31/2016	
Responsible	Head of legal	
	Save	ancel

Fig. 109. Goal parameters in web-browser

#### 6.2.2. Creating a SMART task

When creating the SMART tasks, parameters that have to be filled in are identical to those used for performance matrix (see sec. **4.2. Using performance matrices**). The main difference is that when you create a task as a part of the goal map you don't have to specify the weight coefficient (Fig. 110).

	Creating a SMART Task	×
Subject *	Develop a set of criteria for data classification	
Result *	Delinquent debts are classified by types	
Executor *	~ <b>£</b>	
Period	Accountant	
Description	Davis William HR Manager	
	Foster Bill Head of Branch office 1	
	Green Larry Lawyer	
	Volumes Robert Sa	Cancel

Fig. 110. Adding a SMART task to the goal

Created SMART task will be displayed on the map as an indicator of 1. It will be located in the lower right corner of the goal box, where the first digit (in this case 0) indicates the number of completed tasks, and the second digit (in this case 1) - the total number of SMART- tasks set for the goal. Further editing can be made from SMART task page.

#### 6.2.3. Creating an activity

Besides SMART tasks, you can also link activities to the goal. In the event creation window you need to enter the **Name**, set **Plan Period** for the event and put responsible person in charge of the event (Fig. 111).

	Creating an event	×
Name *	Training for debt collectors	
Description	Teach speaking techniques	
Plan Period	01/26/2016 🙀 to 02/26/2016 🙀	
responsible		
	Save	Cancel

Fig. 111. Creating an activity in web-browser

Created event will be shown on the map as an indicator **of**. It will be located in the lower right corner of the goal box, where the first digit (in this case 0) indicates the number of completed events, and the second digit (in this case 1) - the total number of planned events. Further editing can be made from the activity page.

#### 6.2.4. Goal menu

To get the information about activities and SMART tasks assigned to the goal, click on the goal. It will open a menu on the right of the screen that will reflect all the elements associated with the goal. You can access element's pages from this menu. The menu also shows goal dependencies, i.e. those elements that affect goal achievement. In addition, the menu allows you to change **Status** and **Priority** of the goal (Fig. 112).

Show All Current Period Activities SMART Tasks	Administrator
■ 2016 \ Legal Service	← January 2016 →
Q.Q.	Increase out-of-court settlement amounts
Increasing fixed asse	et turnover ratio Responsible Legal Department
	Status Start
Prevent delinquency charges	Priority High Regular Low
	✓ Activities 1
Increase out-of-court settlement amounts	Training for debt collectors from 1/26/2016 to 2/25/2016 Mitchell P.
	✓ SMART Tasks 1
	Develop a set of criteria for data Classification January 2016 Green L.

Fig. 112. Goal menu

Changing the **Status** and **Priority** will affect the graphic image. When changing the Status to **In work**, font of the goal will be changed from green to black. After choosing **High** priority you will see the up-arrow key in the upper-left corner. (Fig. 113).

Show All Current Period Activities	SMART Tasks		5	Administrator
- 2016 \ Legal Service				← January 2016 →
QQ			O Increase of	ut-of-court settlement amounts
		Increasing fixed asset turnover ratio	Responsible	Legal Department
Prevent delinguency charges			Status	In work Complete
		uency charges	Priority	High Regular Low
			✓ Activities 1	
↑ Increase out-of-court settlement amounts ■ 0 of 1 ③ 0 of 1			Training for debt collectors from 1/26/2016 to 2/25/2016 Mitchell P.	
			✓ SMART Tas	sks 1
			Develop a January 20	set of criteria for data classification 116 Green L.

Fig. 113. Priority and status indications

Clicking the goal will allow you to go to the goal's page.

#### 6.2.5. Goal page

**Goal page** – is a page that specifies components of the goal and allows editing information about it. Here you can change the following fields: **Responsible**, **Priority**, **Status**, **Goal Achievement Deadline**, as well as create **SMART tasks** and **Activities** (Fig. 114).

Jan 26 Tuesday	← Back	Add SMART Task	Add Activity	Edit	Administrator
🔊 крі	of Incre	ease out-o	f-court set	tlement ai	mounts 🔶 January 2016 🔶
Start	Main De	pends On 0	KPI 0 Activ	ities 1 SMA	RT Tasks 1
	Name		Increa	se out-of-court se	ettlement amounts
ine ine	Responsit	ole	Legal	Department	
🛆 Goals	Priority		🔿 Hi	gh	
• <b>G</b> Goal Maps	Status		In wor	k	
🎯 SMART Tasks	Goal Achie	evement Deadline	e 12/28/	2016	
🎯 Goal Tree	<				
🖶 🥑 Add value to the business					Page generated in 215 ms ELMA v. 3.8.2.23878 R.afb16e9b65f611
🗄 🎯 Increasing fixed asset turnover rati					
Prevent delinquency charges					
Increase out-of-court settle					

Fig. 114. Goal page

**Depends On** tab shows the list of objectives that have an impact on goal achievement.

**Activities** tab shows the list of events designed to achieve the goal. Clicking the left mouse button over the name of activity will open activity's page – page that will give all information about event and allow editing it. (Fig. 115).

<b>K</b> Back	Edit Create Task Add Comment Ask Question	Administrator
🔳 Train	ing for debt collectors	← January 2016 →
Responsible	Mitchell P.	
Description	Teach speaking techniques	
Value		
Plan Period	from 1/26/2016 to 2/26/2016	
Fact Period		
Status		
> 💣 Infl	uences the Goals	
> 🔽 Tas	iks	
Comme	nts Questions Attachments Actions	Sort by Date

Fig. 115. Activity page

Besides standard editing parameters, such as **Description**, **Responsible**, **Plan Period**, this window allows you to type **Fact Period**, enter data about **Value** of the activity – both planned and actual, and change the status.

Activity page shows how the activities affect goal achievement. It also displays current tasks that were assigned to the user. Here you can add tasks to the activity as well (for detailed information see **ELMA BPM Platform** User Manual Manual) (Fig. 116).

	Create Task	×
Activity (KPI)	trol Approver Co-Executors Time Report Limit	
Subject *	Make a list of employees for training	
Executor *	$  \qquad  \lor \textcircled{2} \qquad \rightarrow \qquad \lor \qquad \\$	
	Willson M. × Secretary	
Start Date *	01/30/2016 📰 🗌 Specify time	
End Date *	01/31/2016 🖼 🗋 Specify time	
Activity	Training for debt collectors	
Priority	High v	
Category	~ Q +	
Description		

Fig. 116. Creating a task

On the SMART tasks tab you will see the list of SMART tasks that you will have to accomplish to achieve the goal. Clicking the name of any SMART task opens SMART task page that will display all necessary information and will allow making changes.

**KPIs** tab shows the indicators that help to assess the progress towards achieving the goal. These indicators can be linked to the goal at the stage of editing KPIs in **ELMA Designer**. In the **Web Application** you can also select one of them as the main KPI.

#### 6.2.5.1. Setting the main KPI

In order to link KPI to the goal you have to uncheck the **Unmeasurable Goal** box in the goal page. Doing this will open **Main KPI** field where you will need to select the indicator from the list of KPIs (Fig. 117).

Jan 26 Tuesday	Back Save	Administrator				
N KPI	of Increase out-of-cour	t settlement amounts 🛛 🔶 January 2016 🔶				
Start	Main Depends On 0 KPI 0	Activities 1 SMART Tasks 1				
💿 KPI	Name *	Increase out-of-court settlement amounts				
📥 Goals	Description					
e Goal Maps		Disputes settled out of court Gross profit				
SMART Tasks	Responsible	Human Resources Judicial decisions favorable to the company's interest				
	Priority *					
	Status *	Legal department Level of Customer Satisfaction Material cost				
	Unmeasureable Goal	Material costs in the Branch office 1				
	Main KPI	Viateriai costs in the Branch office 2 Q				
	Goal Achievement Deadline	12/28/2016				

Fig. 117. Selecting the main KPI for the goal

After saving is finished, **Main** tab will display the information about **Main KPI** coloring the progress. Clicking the left mouse button over the name of indicator opens KPI page (see **3.1.5.1 KPI page**)

Jan 20 Tuesday	5 <del>C</del> Back	Add SMART Task	Add Activity	Edit	Administrator			
S KPI	Main D	epends On 0	f-court set	tlement ai	mounts ← January 2016 →			
💿 KPI	Name Responsi	ble	Increa	Increase out-of-court settlement amounts Legal Department				
Coals	Priority Status		(†) Hi In wor	① High In work				
<ul> <li>SMART Tasks</li> <li>Goal Tree</li> <li>Add value to the business</li> </ul>	Goal Achi	Goal Achievement Deadline Main KPI		12/28/2016 Out-of-Court Settlement   trend: -2.78% ↓				
Of Increasing fixed asset turnover rat     Of Prevent delinquency charges     Of Increase out-of-court settle	em				Page generated in 268 ms ELMA v. 3.8.2.23878 R afb16e9b65f611			

Fig. 118. Goal page with defined main KPI

Color indicator will be shown at the upper-right corner of the rectangle in the goal map. Menu will also display the KPI (Fig. 119).

Jan 26 Tuesday	Show All Current Period Activities SMART Tasks		Administrator		
🕥 крі	- 2016 \ Legal Service		← January 2016 →		
Start	QQ		The set out-of-court settlement amounts		
Ma		Increasing fixed asset turnover ratio	Responsible Legal Department		
🗻 Me			Status In work Complete		
📲 Goal Maps	Goal Maps Prevent delinquency charges				
<b>- -</b> 2016			Low		
Egal Service	<		✓ Activities 1		
	1 Increase out-of-court settlement amounts	Fraining for debt collectors from 1/26/2016 to 2/25/2016 Mitchell P.			
	■ 0 of 1 @ 0 of 1		✓ SMART Tasks 1		
			Develop a set of criteria for data classification January 2016 Green L.		
			V KPI 1		
			Out-of-Court Settlement		

Fig. 119. Goal map with defined main KPI

### 6.3 User responsibilities

**My Responsibilities** page displays all the goals, activities and SMART tasks that are under the user's responsibility. You can go to this page from the **Me** portlet.



Fig. 120. Portlet Me, My Responsibilities

**My Responsibilities** button allows opening elements' pages that give all information on each of those elements (Fig. 121).

My Responsibilities ← January 2016 →								
Responsible for Ki	Pls							
✓ Goals								
				Quantity	: 15 🗸	Items found: 2	Pages: 1	G
Goal						Responsible		
of Prevent deling	uency charges					Head of legal		
of Increase out-o	f-court settlement am	ounts				Head of legal		
✓ Activities								
				Quantity	: 15 🗸	Items found: 1	Pages: 1	G
Name		Responsible	Task Number	End Date 🔨	End Date	Статус		
Training for debt	collectors	Mitchell P.		from 1/26/2016 to 2/26/2016				2

Fig. 121. My Responsibilities page

#### 6.3.1. Completing the SMART task or activity.

When making employee responsible for a SMART task or an activity, or defining him as a approver, he will receive system notifications. Notifications will warn users about changes. For detailed information see **ELMA BPM Platform** User Manual Manual or **ELMA Help** (Fig. 122).



Fig. 122. Notification on changes

Any action that affects the elements of the management-by-objectives (MBO) system is counted as a change, that is: completing, changing the status or priority, changing the period, changing approver's name or the name of a person responsible for a task. When you change activity status to **Done** or when SMART task is completed, corresponding element will be crossed out from the list of elements on the **My Responsibilities** page and in the map menu. When you complete the task (or activity) right character within the indicator will expand (in this case 1 out of 1).

If you complete the goal, font will be changed to black and text will be crossed out (Fig. 123).



Fig. 123. Display of completion results

If users do not complete the task (or activity) in time, responsible employee will get a warning (Fig. 124).





#### 6.3.2. Archiving the goal maps

If main goal of the map is achieved or goal map loses its relevance, it should be moved to archive.

To archive the goal map, select the one you need from the map tree in the left-hand menu. Then select **To Archive** command from the right-click context menu (Fig. 125).

Goals  Goal Maps  Goal Maps  Goal Tree  Create Create Create Folder  Create Folder  Create Folder  Create Folder  Create Up Level Up Level Up Level Down  To Archive	Save Check Actions	4	÷‡⇒	Index	Connector
Goals Goals Goal Maps Goal Tree Goal Tree Creat	N KPI				
Goal Maps   Goal Create   Goal Tree   Goal Tree   Goal Tree   Goal Tree   Create Folder   Edit Properties   Delete   Up   Down   Level Up   Level Down	🖧 Goals				
	Goal Maps Goal Maps Goal Ser ⊕ of 2016 Legal Ser ⊕ of Goal Tree		Create Create Folde Edit Properti Delete Up Down Level Up Level Down	er	

Fig. 125. Moving the goal map to archive

Before publishing a version with archived map, **Designer** will show the confirmation message.



Fig. 126. Archiving status notification

Clicking **Yes** will publish revised version of the model. You will not be able to edit the goal map in the **Web Application**, since the goal map will be moved from **Goal Maps** to **Goal Map Archive** section. Font color will be changed to gray (Fig. 127).

Jan 27 Wednesday
KPI
Start
应 крі
🔔 Me
💪 Goals
📲 Goal Maps
🖃 Goal Map Archive

Fig. 127. Archived map folder tree

Users involved in goal achieving, activities and other processes defined for a map will get a notification that the map was moved to archive (Fig. 128).



Fig. 128. Archiving Message

If necessary, you can restore goal map from the archive and continue to work with it. Follow the same instructions as for archiving. The only difference is that you are now choosing From Archive command.

# Chapter 7. Exporting KPI values and performance data

Any user can export available KPI values to Excel at any time. To do this, click **Export to Excel** button on the KPIs page.

Let's export data on KPIs over the month. On the KPI home page click on **KPI**. It will open the page with the list of available KPIs. You can also open this page by selecting **All KPI's** section from the **Company** portlet (Fig. 129).

KPI		Tuesday, Jan	uary 26, 2016			
Start		⊥ Me	My KPIs My Responsibilities My Performance			
Dashboards		© KPI			Dashboards	
Less Employees	<					
		My KPIs Plan + Fact		KPI Marks	🔏 Employees	

Fig. 129. Opening the list of all KPIs

Choose the month and the list of values, and click **Export to Excel** (Fig. 130).

	Administrator
Expand All Collapse All Export to Excel	See 🛛 🖉 🖉 See See See See See See See See See Se
KPI List	← January 2016 →
	Level: 9 V Items found: 2/
	Responsible Periodicity Period Plan Fact Status Trend
E production	
I Level of Customer Satisfaction	Willson M. Month January 95.00 % 92.07 % 😝 -1% \downarrow
Number of service requests	Month January 5,359 pcs. 12.68% 🕇
Number of complaints	Month January 425 pcs. 15.8% †
	Jones R. Month January € 152,800.00 € 148,750.00 🤤 16.76% ↑
Nevenue	Month January € 271,800.00 8.2% ↑
💊 Payroll budget	Month January € 50,000.00 -9.09% ↓
Material cost	Reed D. Month January € 69,000.00 € 73,050.00
Material costs in the Branch office 1	Foster B. Month January € 24,000.00 € 22,330.00 🍚 -1.73% ↓
Material costs in the Branch office 2	Reed D. Month January € 12,000.00 € 15,820.00 👄 25.76% ↑
Material costs in the Branch office 3	Reed D. Month January € 15,000.00 € 16,000.00 👄 8.84% ↑
Material costs in the Branch office 4	Reed D. Month January € 18,000.00 € 18,900.00
😑 늘 Legal department	
Out-of-Court Settlement	Mitchell P. Month January 75.00 % 35.00 % 🥥 -2.78% \downarrow
Number of disputes	Month January 10 times -9.09%
Note: Settled out of court	Month January 5 times 25% 🕇
Successful judicial proceedings	Mitchell P. Month January 70.00 % 66.00 % 🍚 24.53% 🕇
🔨 Total number of legal cases	Month January 5 times -44.44% 🛔

Fig. 130. Export to Excel button

File save path may vary depending on your browser. Contents of the received file will look like this (Fig. 131):

	A	В	С	D	E	F	G
1	Export date: 1/26/2016 4:21:39 PM				_	-	
2	Indicator	Responsible	Period	Plan	Fact	Status	Trend
3	Production						
4	Level of Customer Satisfaction	Secretary	January	95 %	92.07 %	Allowable	-1.00
5	Number of service requests		January		5359 pcs.	N/A	12.68
6	Number of complaints		January		425 pcs.	N/A	15.80
7	Gross profit	Chief accountant	January	152800 €	148750 €	Allowable	16.76
8	Revenue		January		271800 €	N/A	8.20
9	Payroll budget		January		50000€	N/A	-9.09
10	Material cost	Head of Production	January	69000€	73050 €	Good	6.17
11	Material costs in the Branch office 1	Head of Branch office 1	January	24000€	22330 €	Allowable	-1.73
12	Material costs in the Branch office 2	Head of Production	January	12000€	15820 €	Good	25.76
13	Material costs in the Branch office 3	Head of Production	January	15000 €	16000 €	Good	8.84
14	Material costs in the Branch office 4	Head of Production	January	18000€	18900 €	Good	0.53
15	Legal department						
16	Out-of-Court Settlement	Head of legal	January	75 %	35 %	Critical	-2.78
17	Number of disputes		January		10 times	N/A	-9.09
18	Disputes settled out of court		January		5 times	N/A	25.00
19	Successful judicial proceedings	Head of legal	January	70 %	66 %	Allowable	24.53
20	Total number of legal cases		January		5 times	N/A	-44.44
21	Judicial decisions favorable to the company's interest		January		4 times	N/A	33.33

Fig. 131. Content of the file with the list of KPIs

The same way you can export employee's performance matrix. Content of this file will look as follows:

	A	В	С	D	E	F	G
1	Export date: 1	/27/2016 9:11:08 AM					
2	Responsible	Matrix Element	Weight coefficient	Plan	Fact	Result	Eff. *Weight.
3		Status: Created					
4		Performance	100,00%				82,58%
5	Myers Jay	KPI	85,00%				82,58%
8		SMART Tasks	0,00%				0,00%
9		Marks	15,00%				0,00%

Fig. 132. Content of the file with performance matrices

# Chapter 8. ELMA KPI Mobile App

**ELMA KPI for iPad** provides access to the values of all the indicators and employee performance matrices. All the data displayed in KPI is loaded into local memory so you can get information you need even without the Internet connection.

# 8.1 Installing the application

To install the application on your iOS mobile device you will need to perform a search in AppStore using **ELMA** keyword (Fig. 133).

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Fig. 133. Searching the application in the App Store

After that, you need to go to the page that specifies description of KPI application and click on download icon.

After downloading and installing this application, you will see the shortcut icon for the application that will be added to mobile device home screen.



Fig. 134. Launcher icon

Running this app will open a start screen. Type the following data:

- **ELMA** server address you have to connect to,
- User login used in **ELMA**;
- Password.

Then click the **Enter** button (Fig. 135).

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Fig. 135. Start screen

# 8.2 Application capabilities

Home page will appear after authorization. This page will display current values of all indicators related to the user and performance matrices of the employees that are subordinated to him (Fig. 136). You can change the period (in our case month) by clicking on right-pointing or left-pointing arrow displayed on the top of the screen.



Fig. 136. Home page of the mobile application

All the elements of the page are active. For instance, clicking on **Total Leads** KPI will open indicator page with detailed information (Fig. 137).

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rks	Leads from agency networks	Head of Marketing Department	
rks	Head of Marketing Department Leads from agency networks	Leads from exhibitions and seminars Baldwin Ed Head of Marketing Department	

Fig. 137. KPI page

You can leave this page by clicking on any of the indicators.

When you click a link to an **Indicator** page, application will open the list of all KPIs available to the user (Fig. 138).

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Main office Since Fores Paul Head of Sales Department		€ 2,776,000.00	June, 2015	-1.6%↓
Branch office No. 1 Harris David Head of Branch Office No. 1		€ 609,000.00	June, 2015	-34.2%
Branch office No. 2 Collins Earl Head of Branch Office No. 2		€731,000.00	June, 2015	-44.6%
✓ SERVICE DEPARTMENT				
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Fig. 138. All KPIs page of the mobile application

All elements are active as well here.

On the **All Employees** page you will see a list of subordinate employees and information about their performance for a current period. Selecting one of the employees will open performance matrix of this employee. This page, in turn, allows you to open the pages of KPIs displayed there (Fig. 139).

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Baldwin Ed Head of Marketing Department Chief Marketing Officer	90.8% >	Collins Earl Head of Branch Office No. 2	58.8% >
Flores Paul Head of Sales Department	143.0% >	Harris David Head of Branch Office No. 1	75.1% >
Miller Adam Chief Commercial Officer	84.1% >	Murphy Evelyn Sales Manager	138.5% ,
Nelson James Chief Technology Officer	48.6% >	Taylor Erica Sales Manager of Branch Office No. 2 Sales Manager	87.2% >
Webb Elena Chief Financial Officer	50.0% >		
	Main Indicators Em	ployees More	

Fig. 139. Employees' page

Clicking the **More** button at the foot of the page opens configure page. You can change the user by clicking on **Log out.** If you need to update the data click the **Synchronization** link (Fig. 140).

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	0 0 4	
	Main Indicators Employees More	

Fig. 140. Configure page
## Chapter 9. Useful Resources

Along with **ELMA KPI** quick-start manual, the following sources describe the functions of **ELMA** applications:

- User Manual of **ELMA BPM Platform**
- User Manual of **ELMA Web Portal**
- User Manual of **ELMA ECM+**
- User Manual of **ELMA CRM+**
- User Manual of **ELMA Projects+**

General description and purchase conditions of the applications are available at **ELMA website:** <u>http://www.elma-bpm.com</u>. You can also **Ask a question** on this website, using a respective link.

An **Online Demo** <u>http://demo.elma-bpm.com/</u> demonstrates the main functions and utilization of the applications. If you want to learn more about any of the applications, download a demo with the same settings as in the online version using the same link.

We continuously develop **ELMA** system and Platform-based components for coping with more specific tasks. You can find the list of these components and their purchase conditions at **ELMA Store**: <u>https://store.elma-bpm.com/</u>.

If you are experiencing technical difficulties, please visit ELMA technical support website: <u>http://support.elma-bpm.com</u>.

If you need assistance with the system or have questions about partnership with ELMA Company, contact us:

• Luxemburg: + (352) 20-30-11-40

http://www.elma-bpm.com/about-us/