ELMA KPI

User Manual

Business Process and Performance Management System

Contents

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** → **Users** → **Group** → **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.

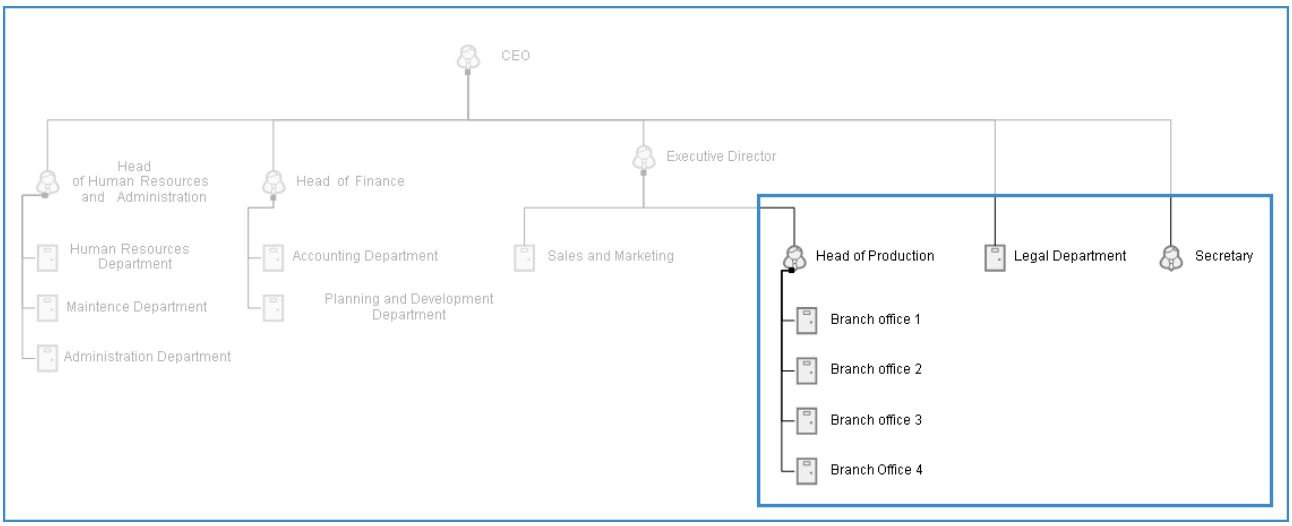


Fig. 1. Model of Organizational Structure

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.
2. **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.
7. **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.
10. **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).

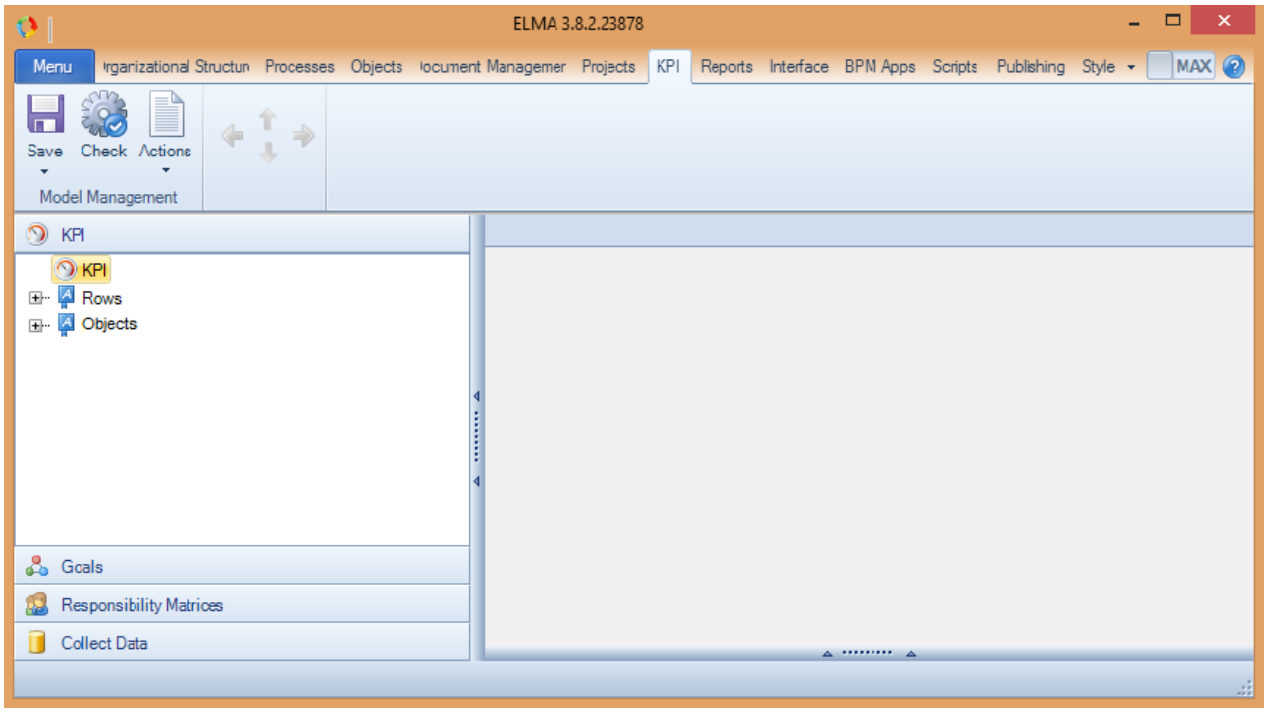


Fig. 2. KPI section of the ELMA Designer

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).

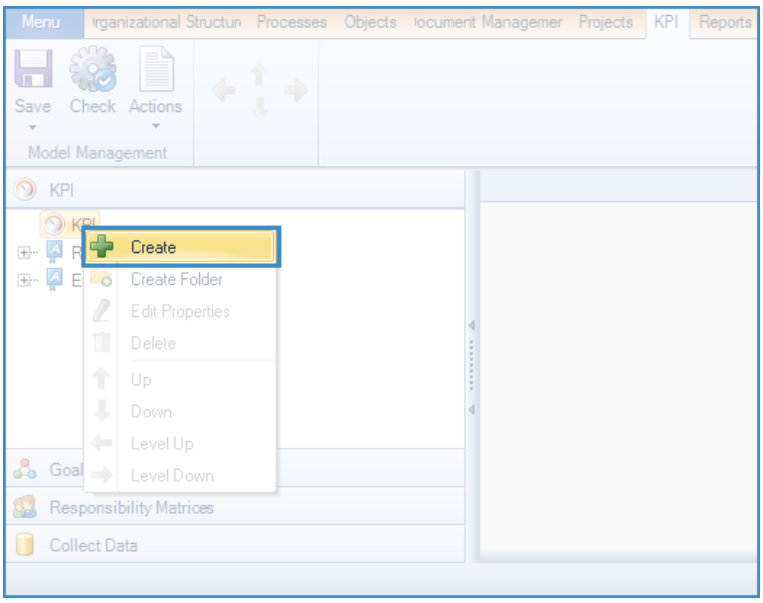


Fig. 3. Creating an Indicator

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).

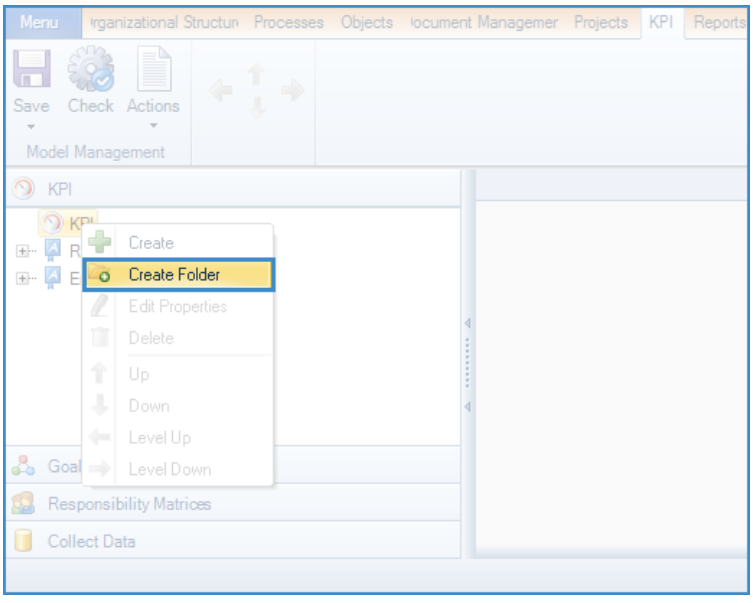


Fig. 4. Creating a folder

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):

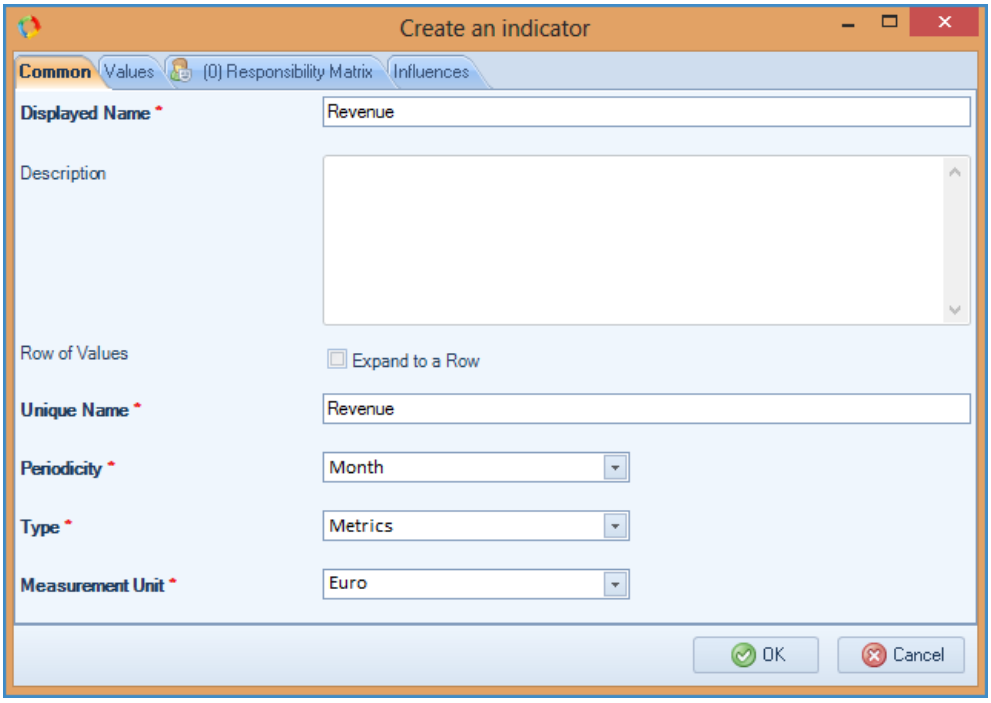


Fig. 5. Filling primary data

- **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).

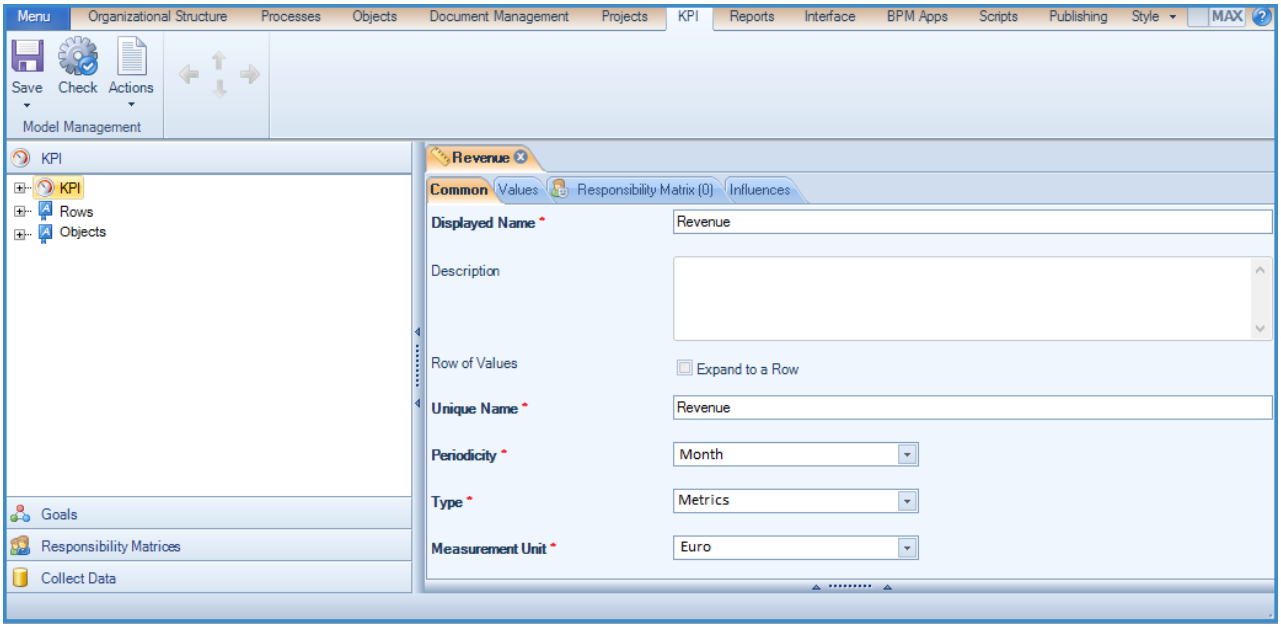


Fig. 6. Parameters of the Revenue metric

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.

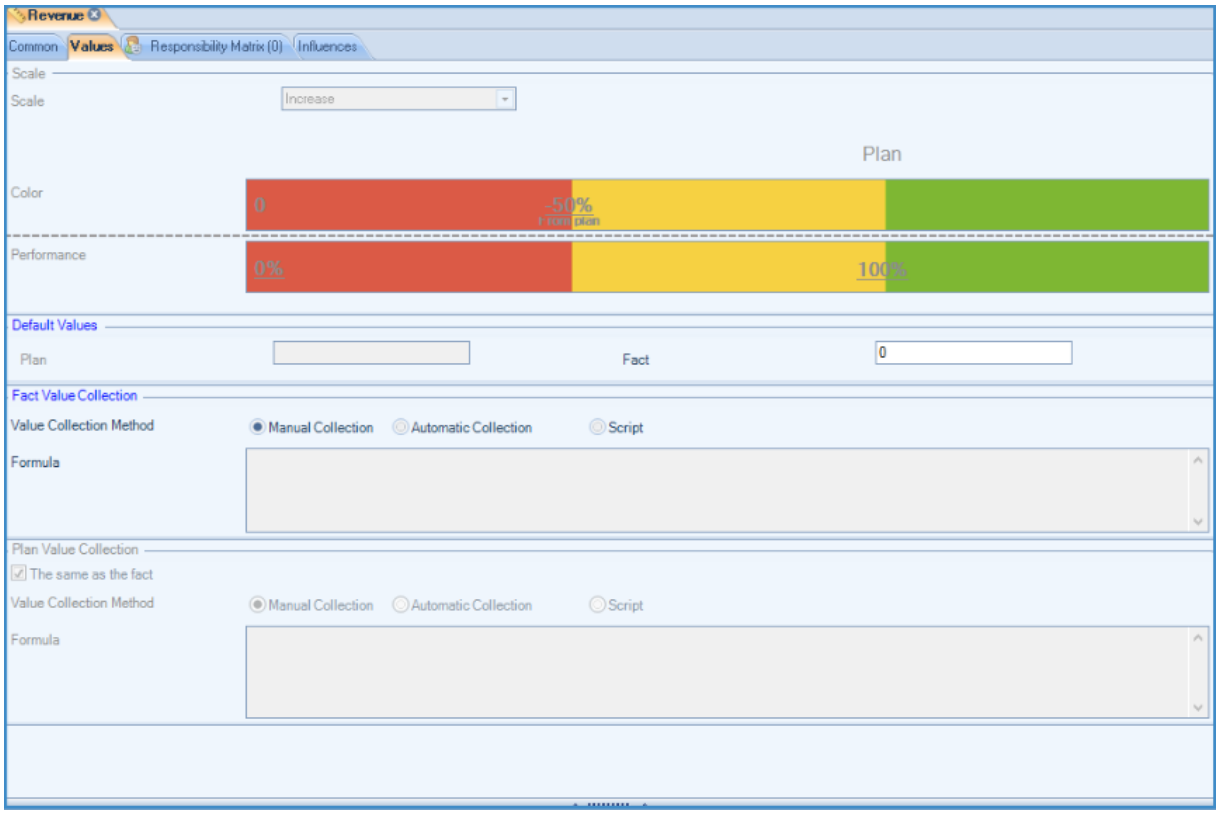


Fig. 7. Values tab in the Revenue metrics

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**.**

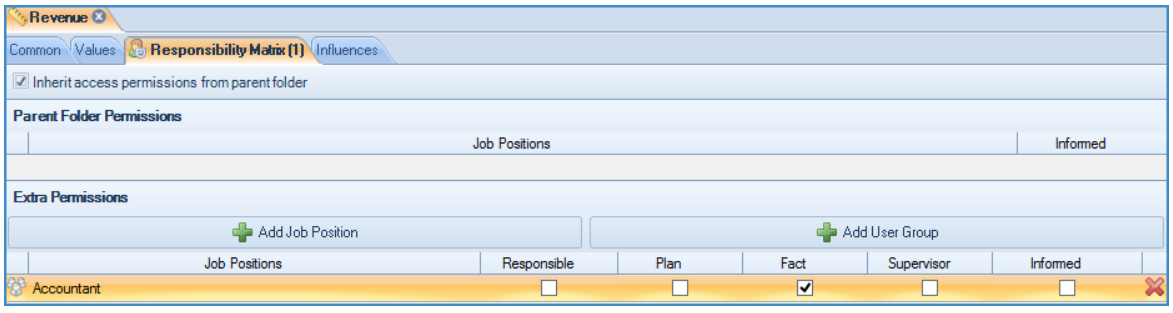


Fig. 8. Assigning employee responsible for fact data entry

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).

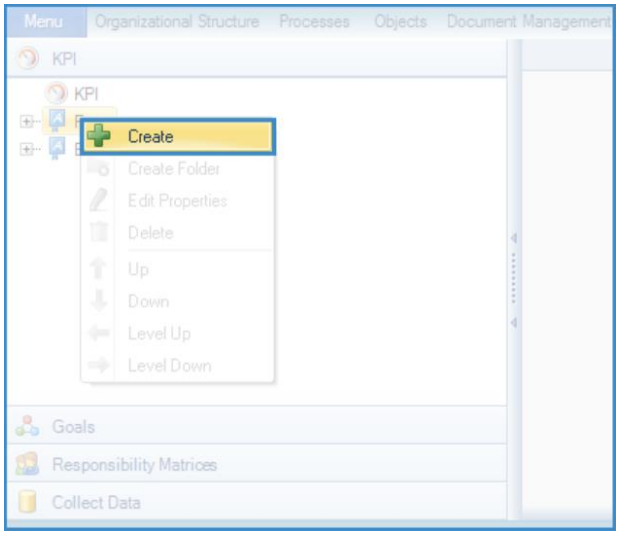


Fig. 9. Creating a reference to a row

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

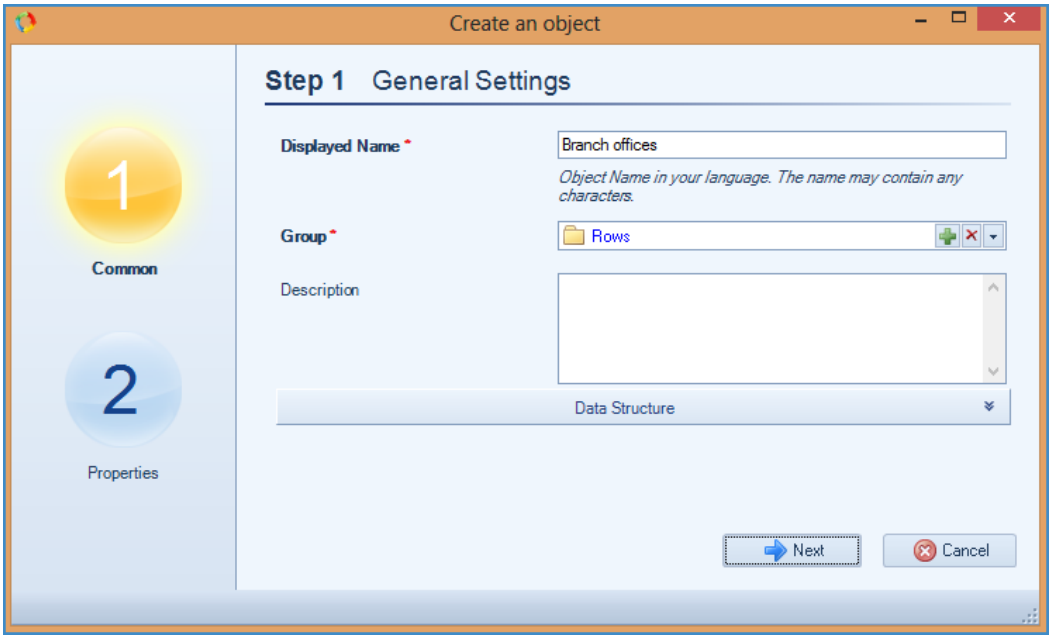


Fig. 10. General parameters of the row

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);

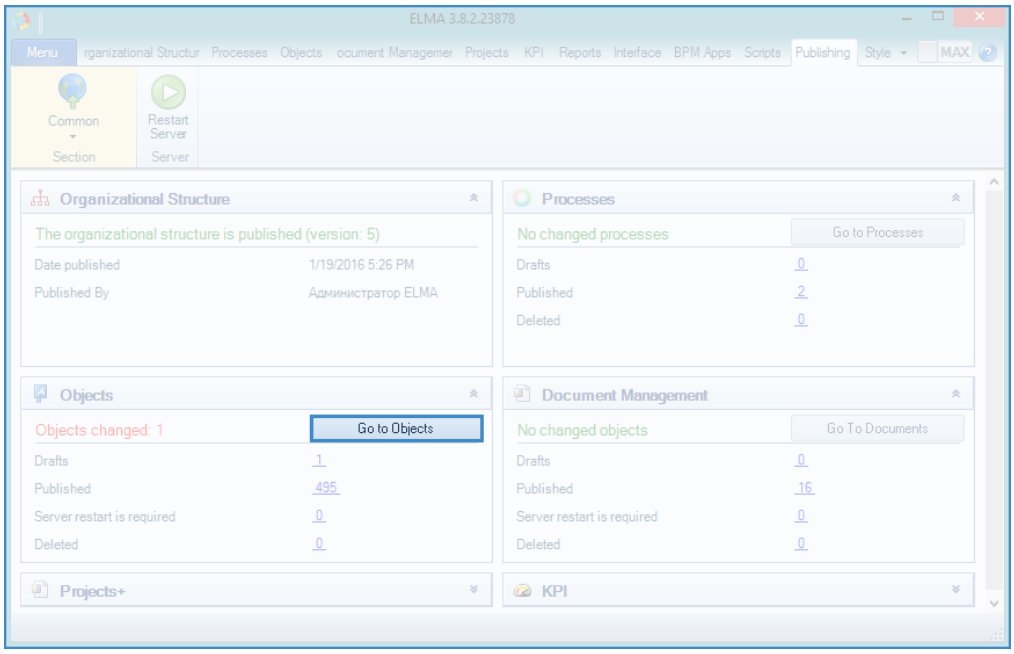


Fig. 11. Publishing objects tab

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

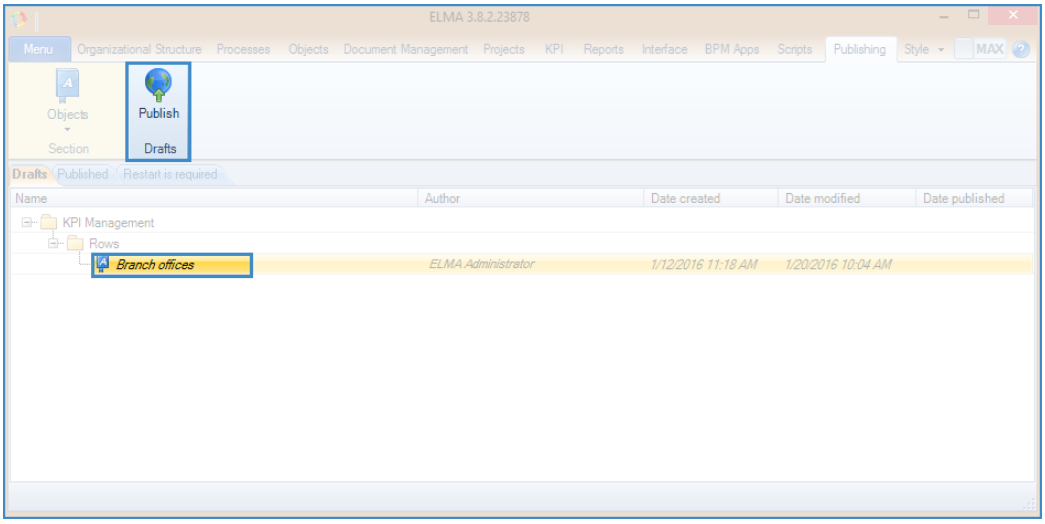


Fig. 12. Publishing created row

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

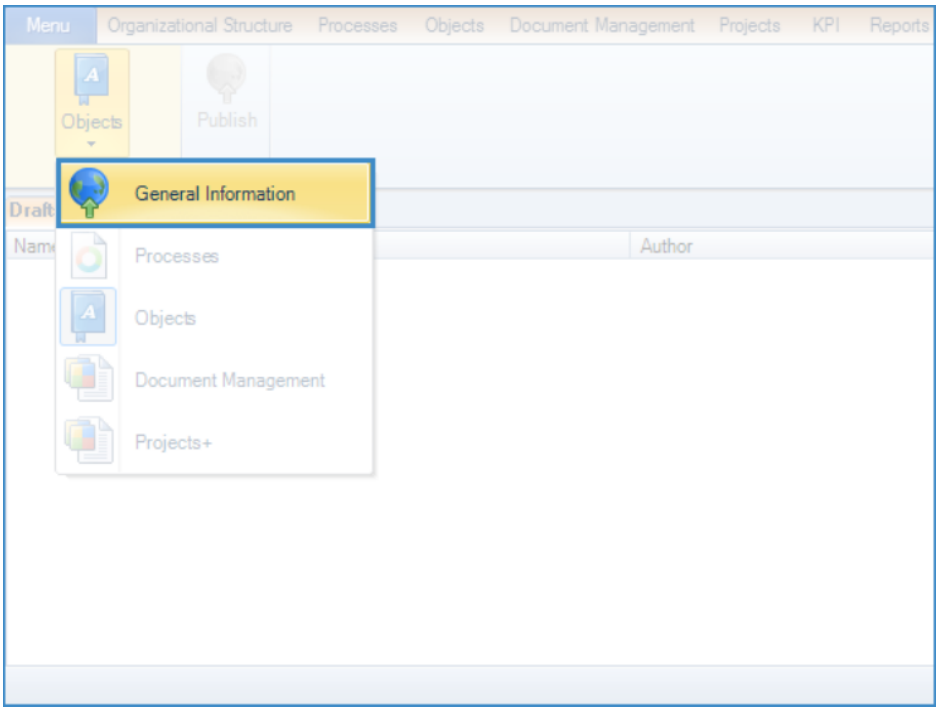


Fig. 13.

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

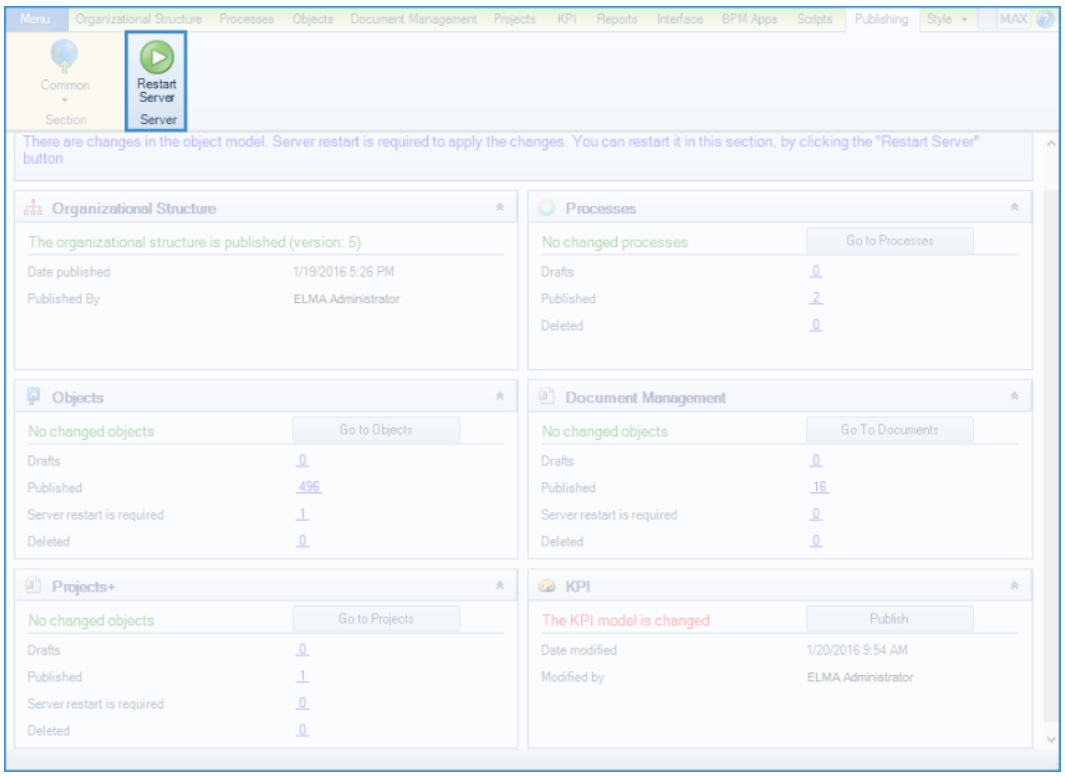


Fig. 14. Restarting the server

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).

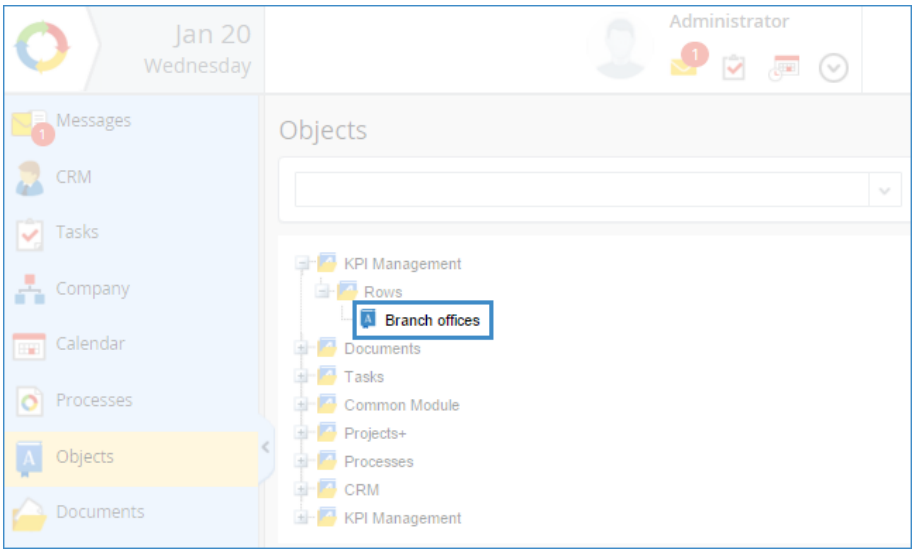


Fig. 15. Branch Offices object in Web Application

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).

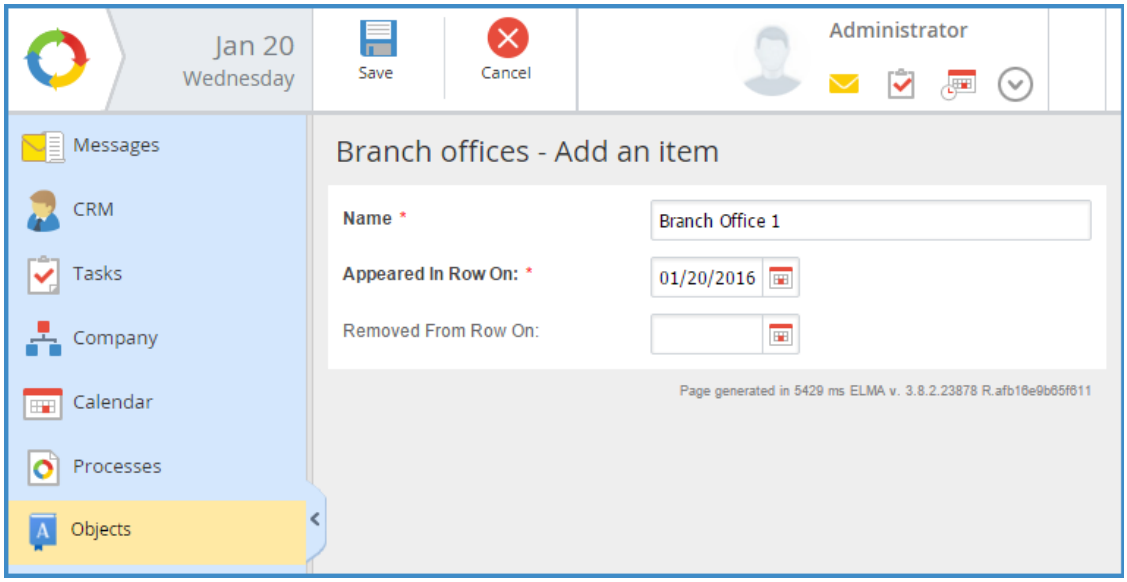


Fig. 16. Adding item into Branch Offices object

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).

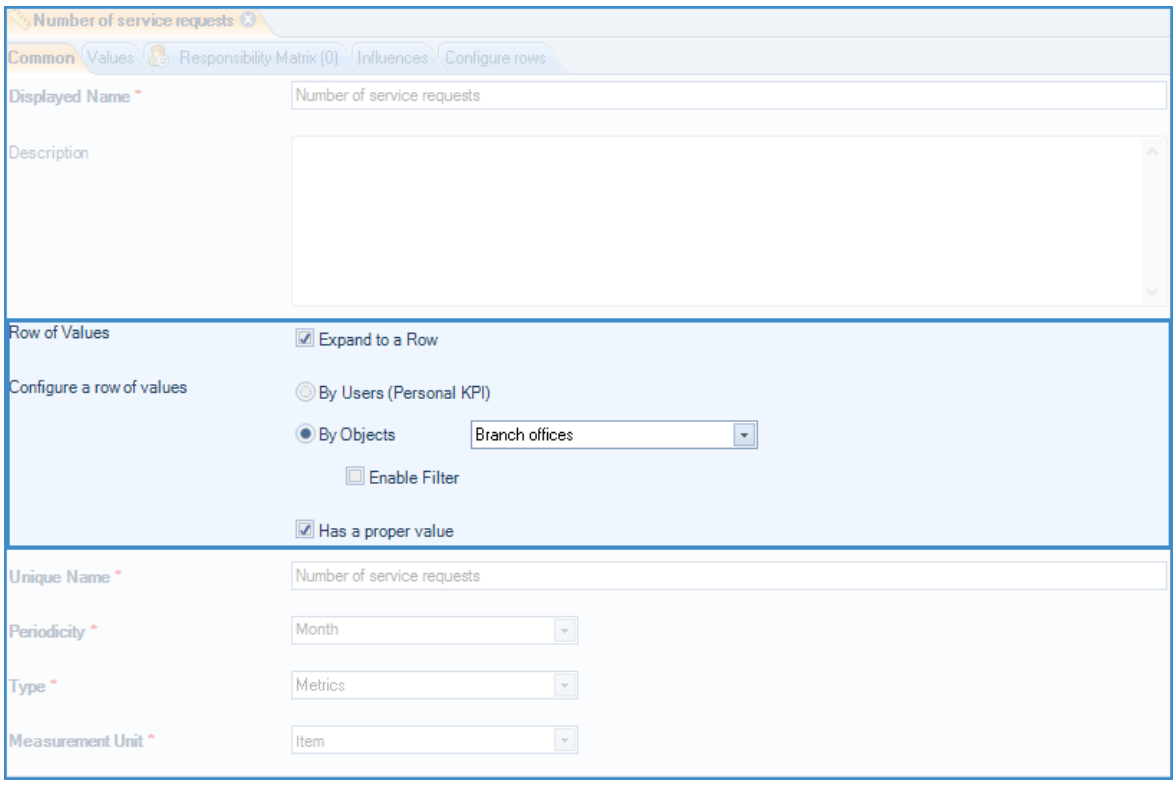


Fig. 17. Setting expansion parameters

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).

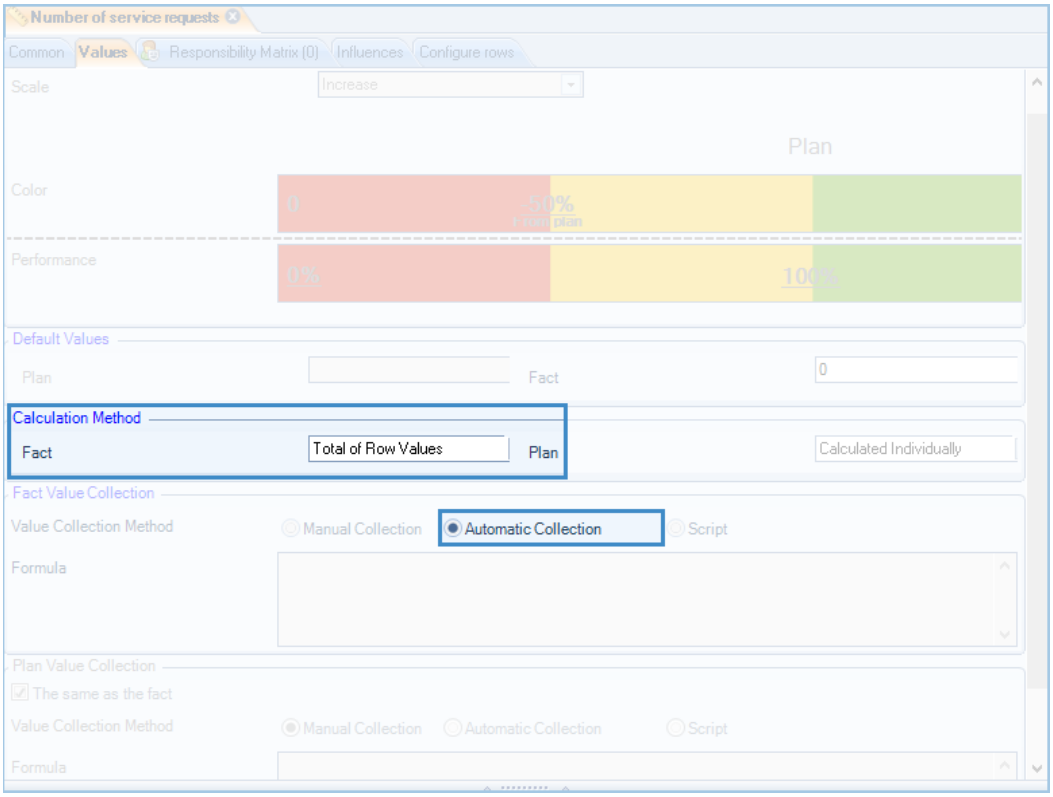


Fig. 18. Values tab settings

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).

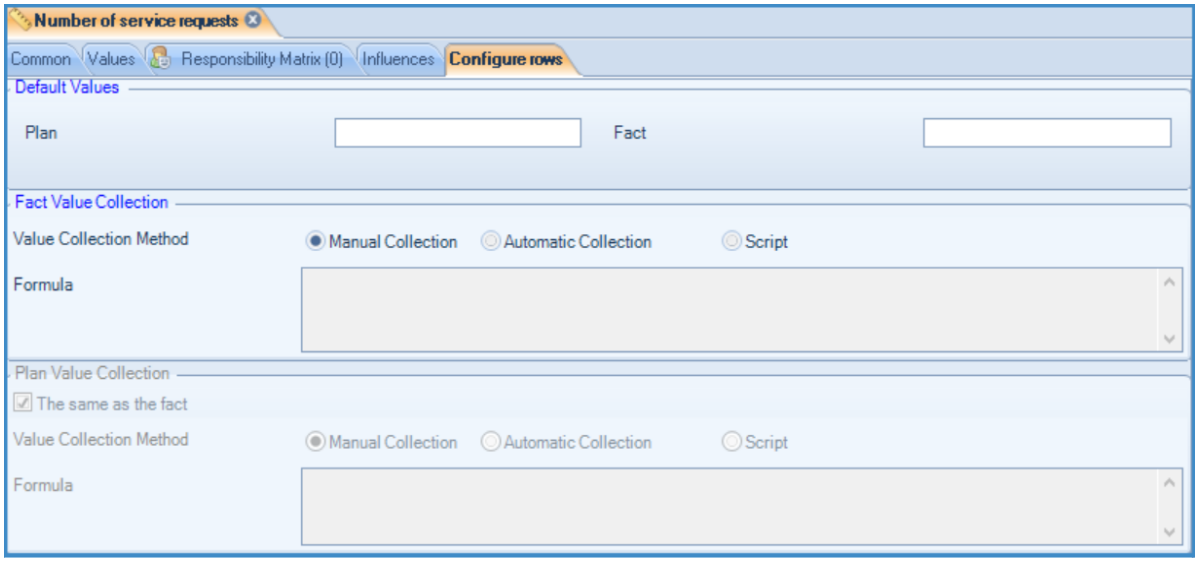


Fig. 19. Configuring collection method

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).

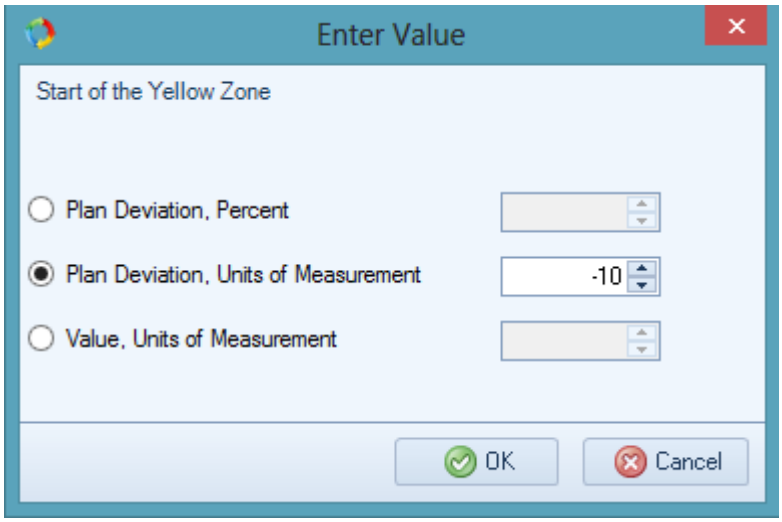


Fig. 20. Setting breakpoint

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

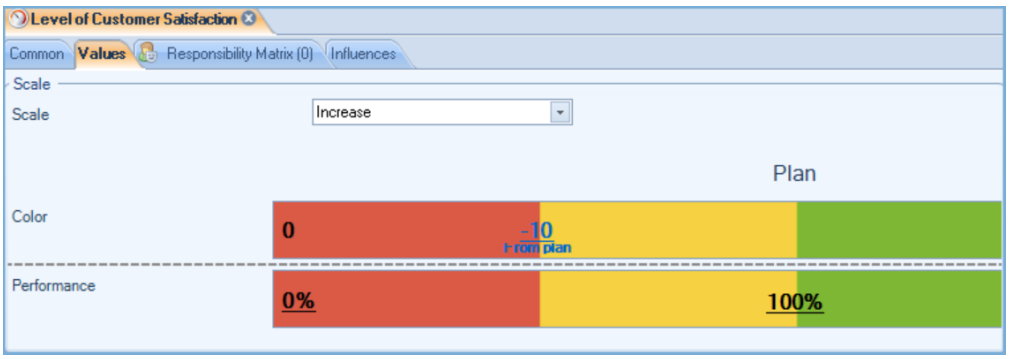


Fig. 21. Scale Configuration

- 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).

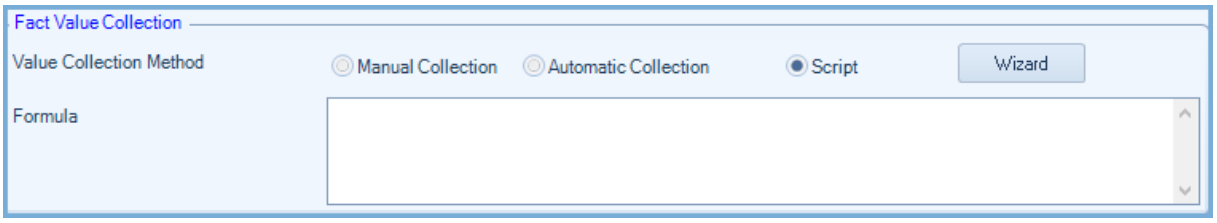


Fig. 22. Selecting Script method

- 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.

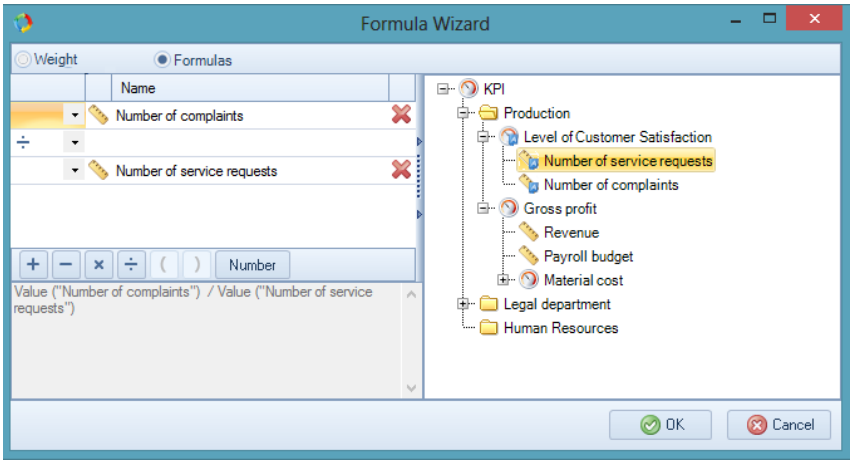


Fig. 23. Formula Wizard

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):

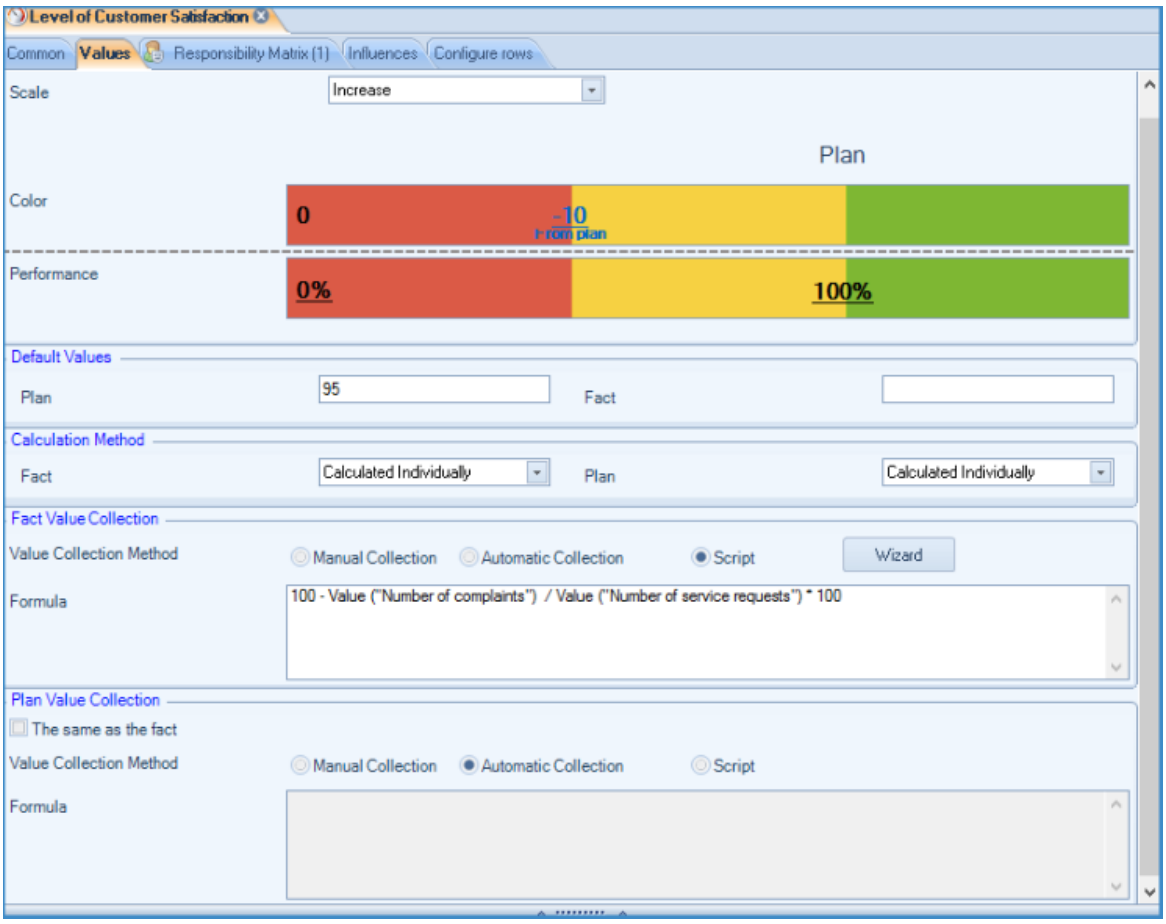


Fig. 24. Filled Values tab

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).

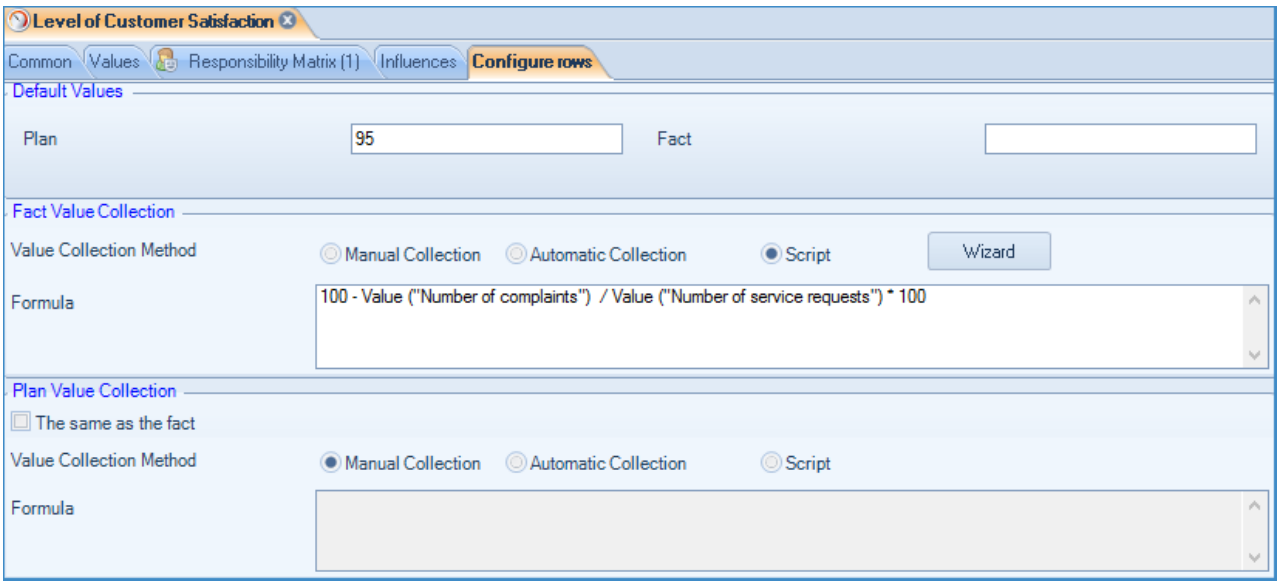


Fig. 25. Configuring rows for Level of Customer Satisfaction indicator

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).

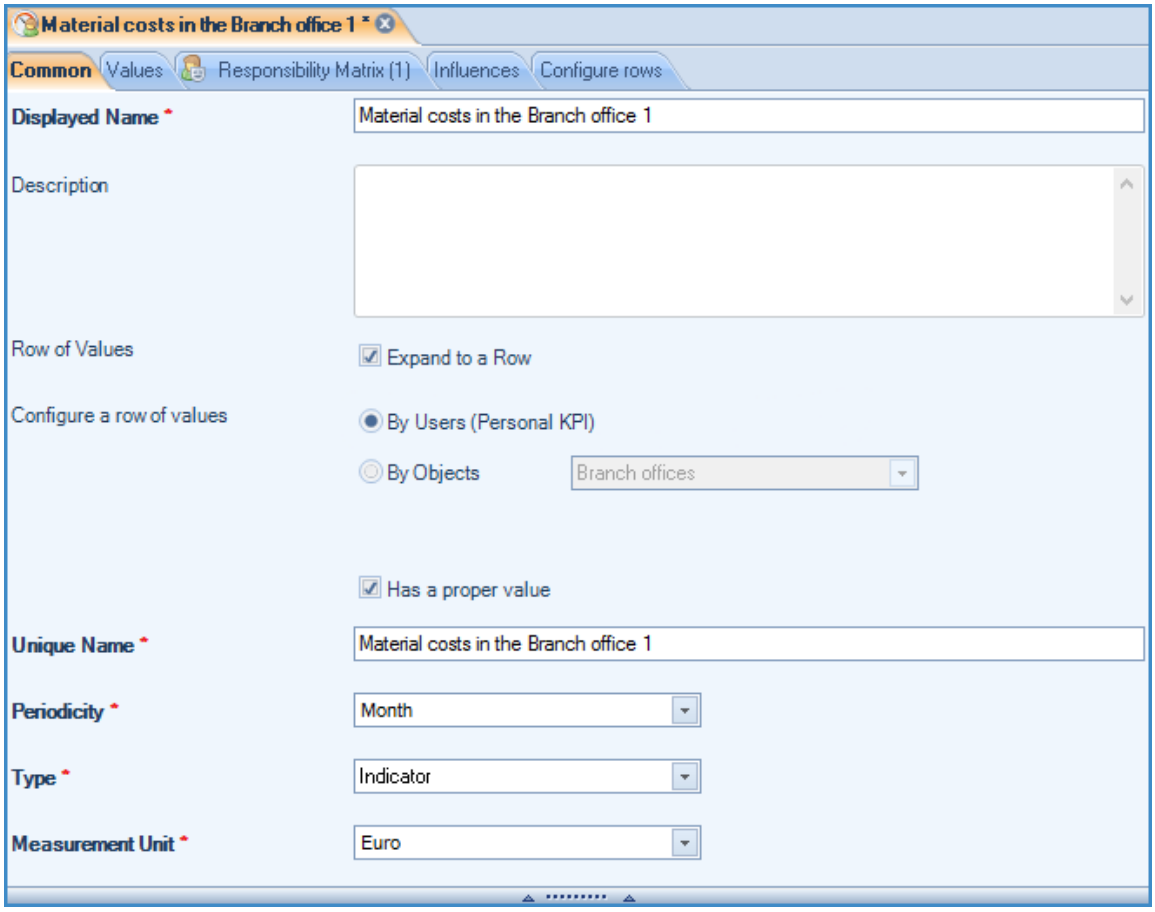


Fig. 26. Parameters for Material costs in the Branch Office No.1

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).

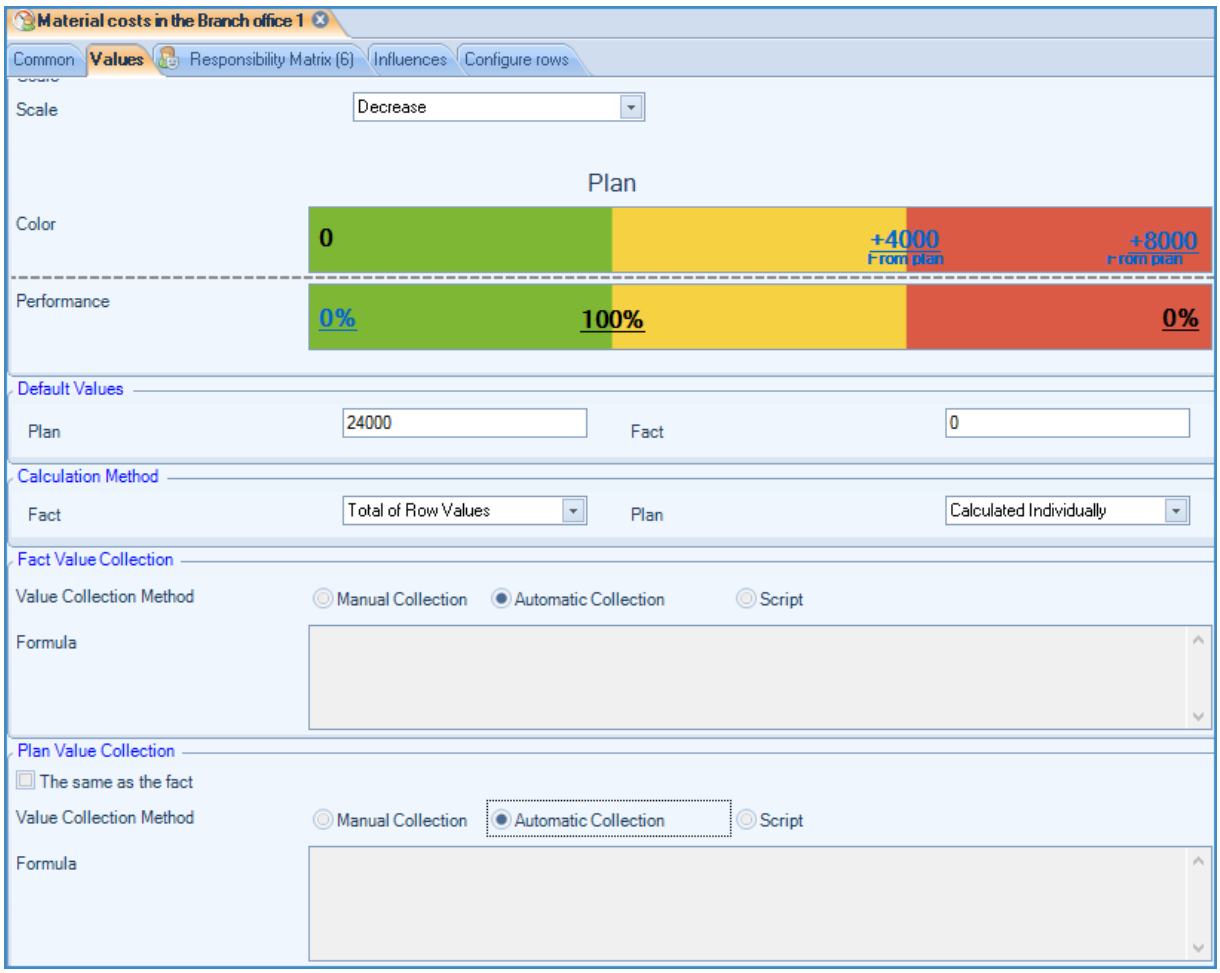


Fig. 27. Values parameters Material costs in the Branch Office No. 1

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

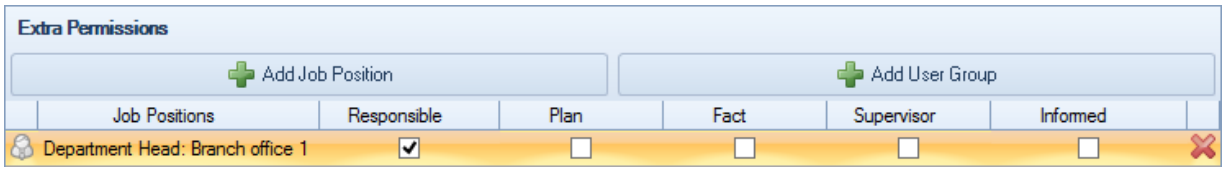


Fig. 28. Responsibility matrix for Material costs in the Branch Office No. 1

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).

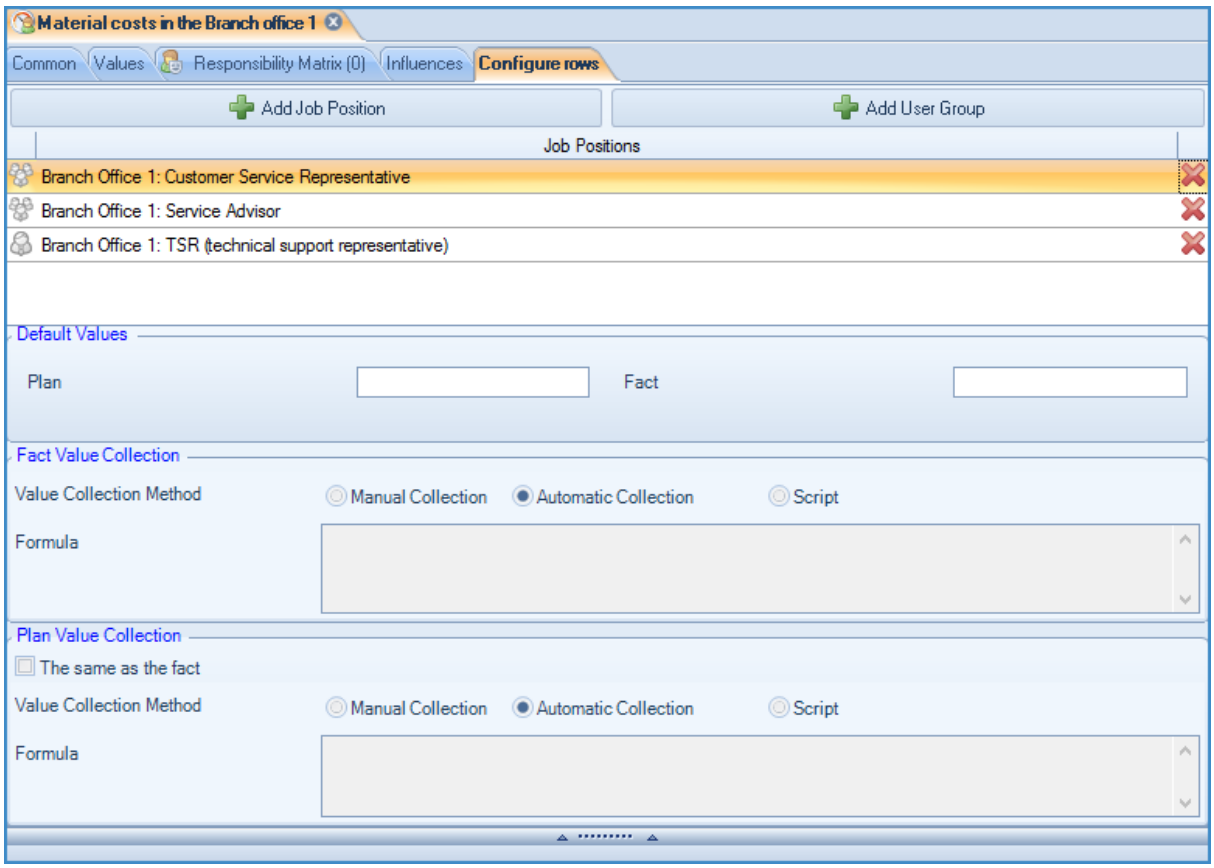


Fig. 29. Personalization parameters for Material costs in the Branch Office No. 1

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.

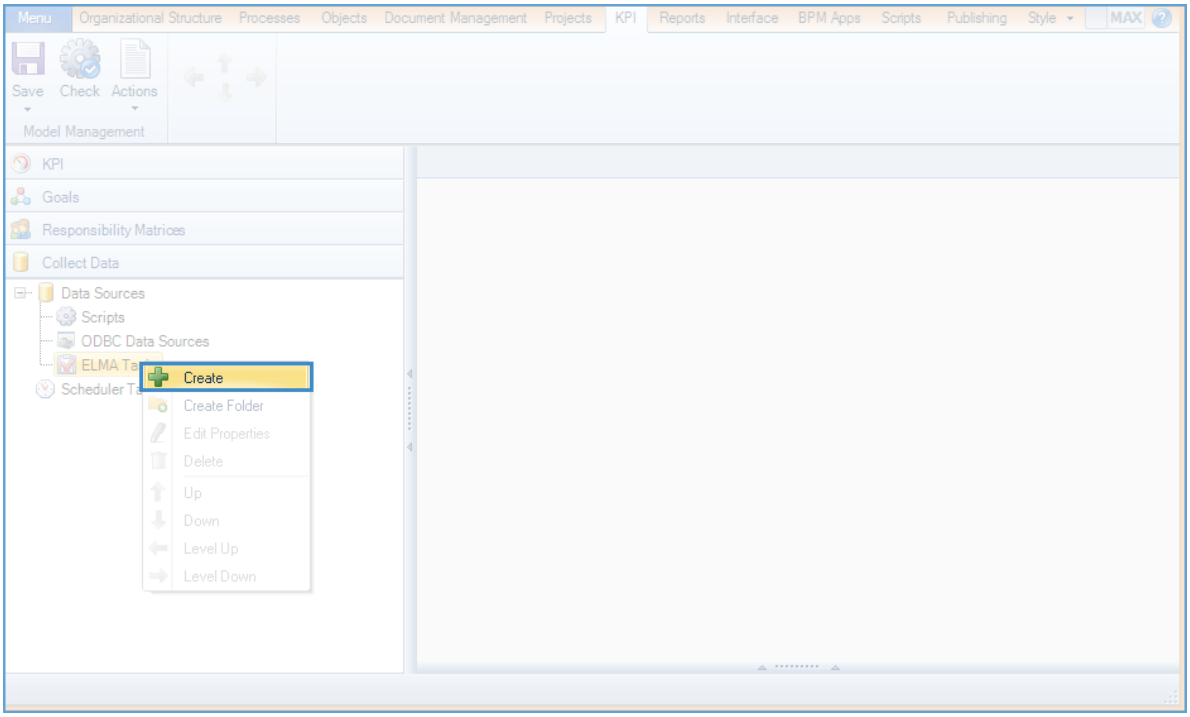


Fig. 30. Creating data collection task

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).

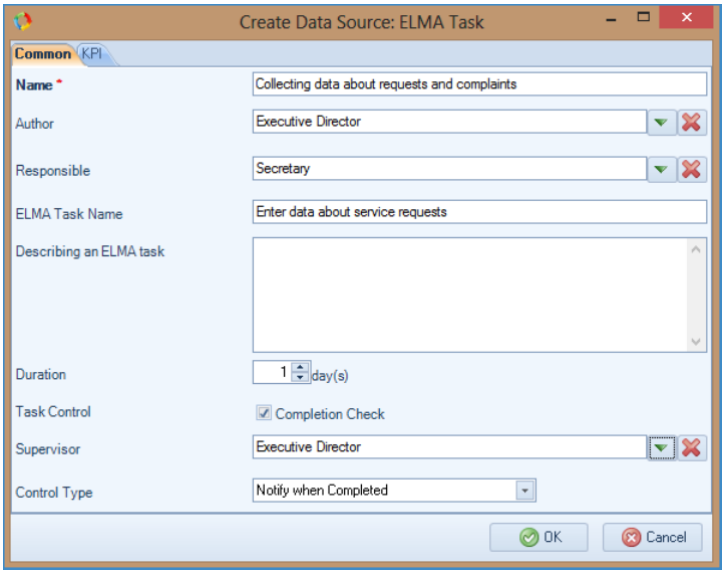


Fig. 31. General settings for data collection

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).

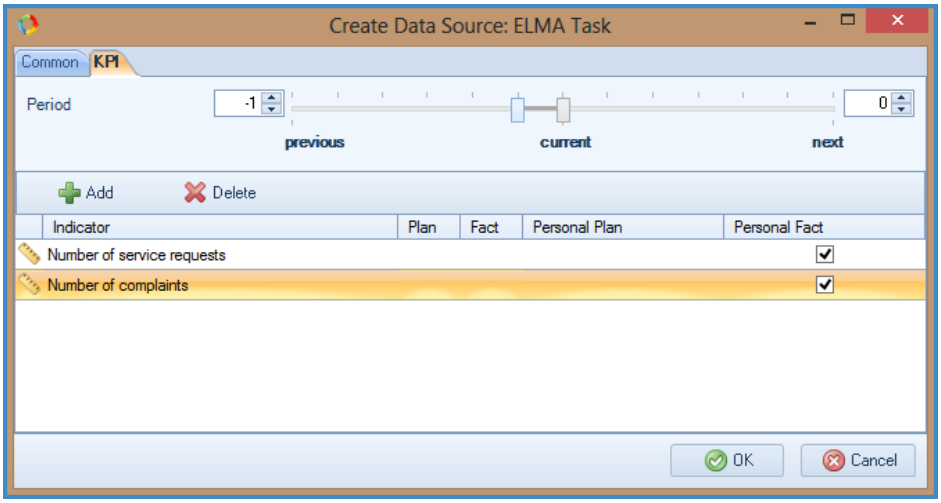


Fig. 32. Selecting KPIs for data collection

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.

	A	B	C	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).

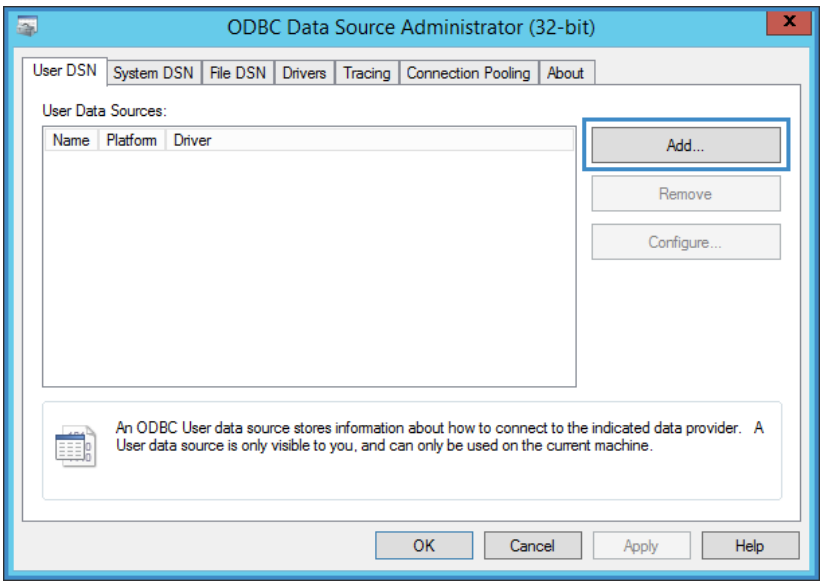


Fig. 34. Adding ODBC data source in the operating system

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**.

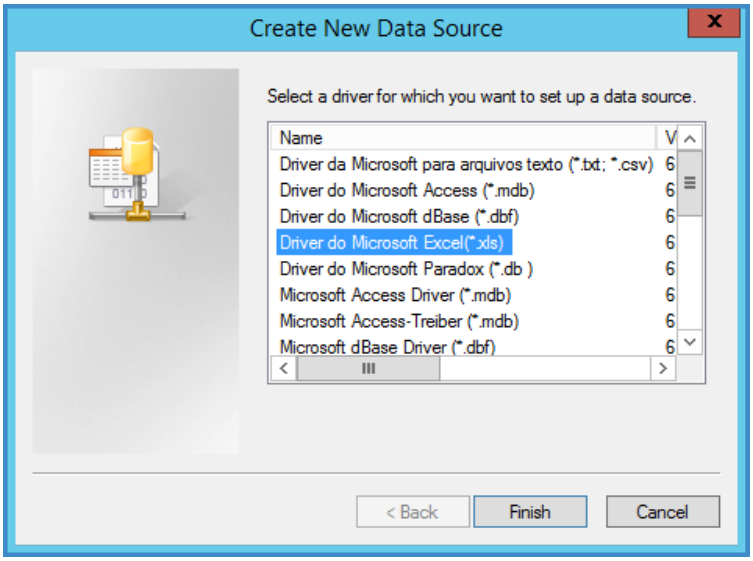


Fig. 35. Selecting Microsoft Excel

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).

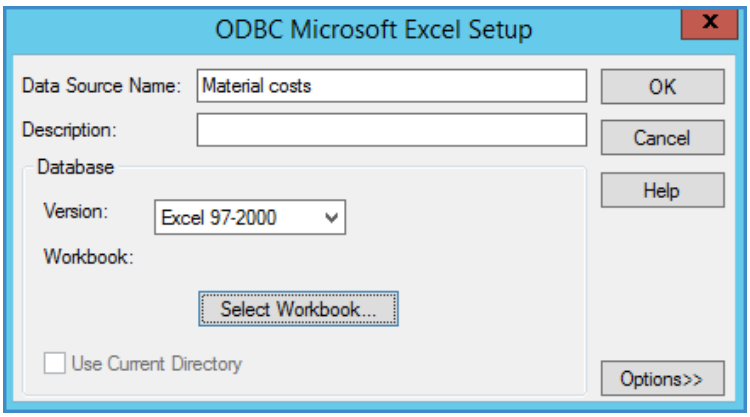


Fig. 36. Selecting the data source

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).

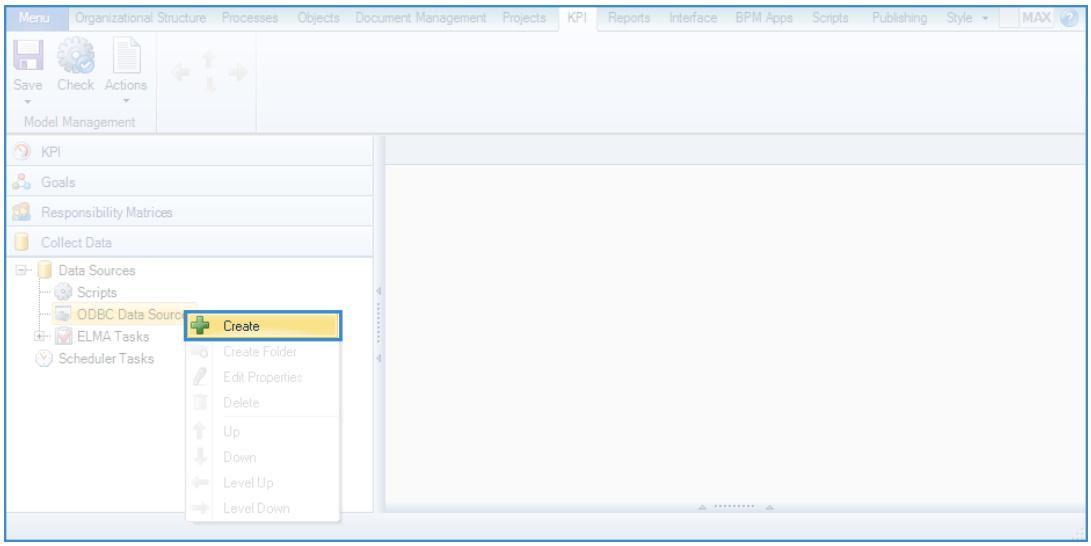


Fig. 37. Selecting ODBC source in ELMA Designer

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.

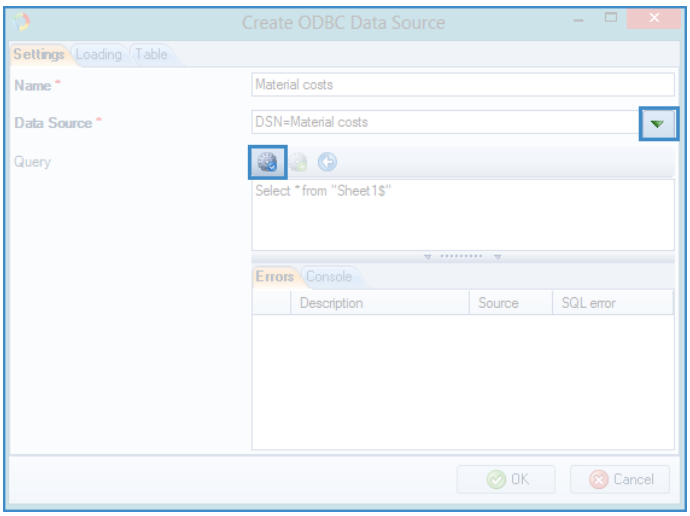


Fig. 38. General parameters for ODBC source configuration

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.

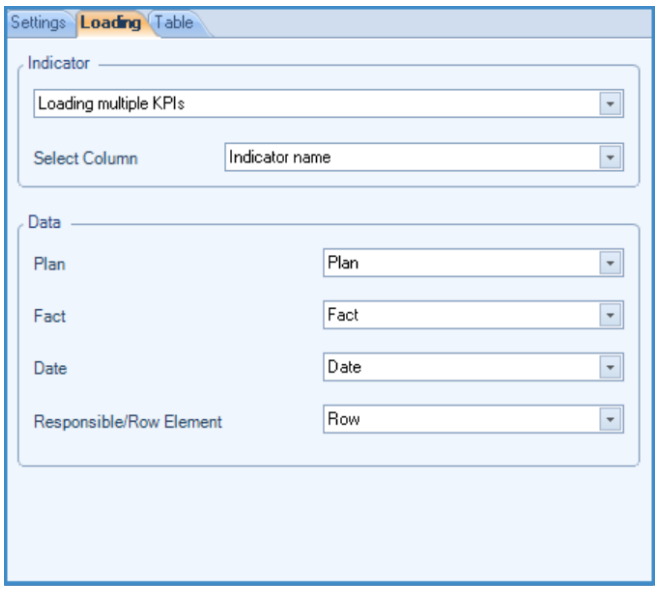


Fig. 39. Data Load Parameters

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).

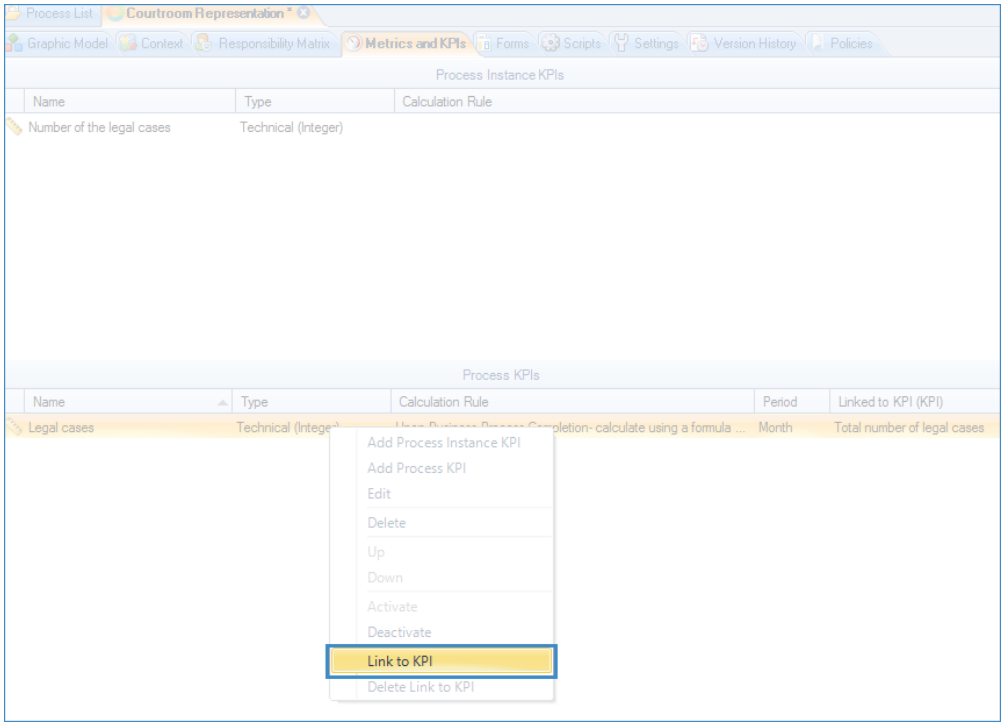


Fig. 40. Using Link to KPI command

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

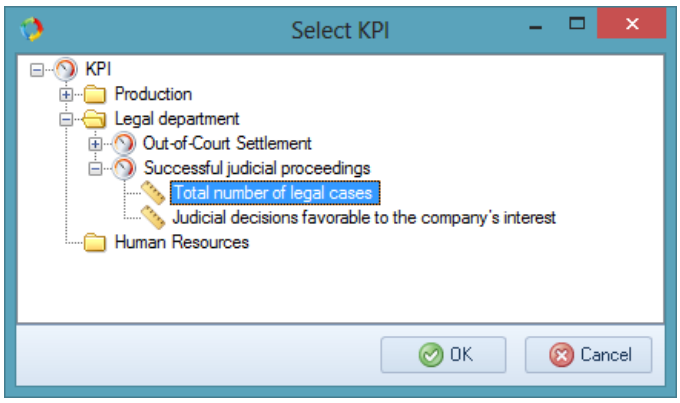


Fig. 41. Selecting KPI

- 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).

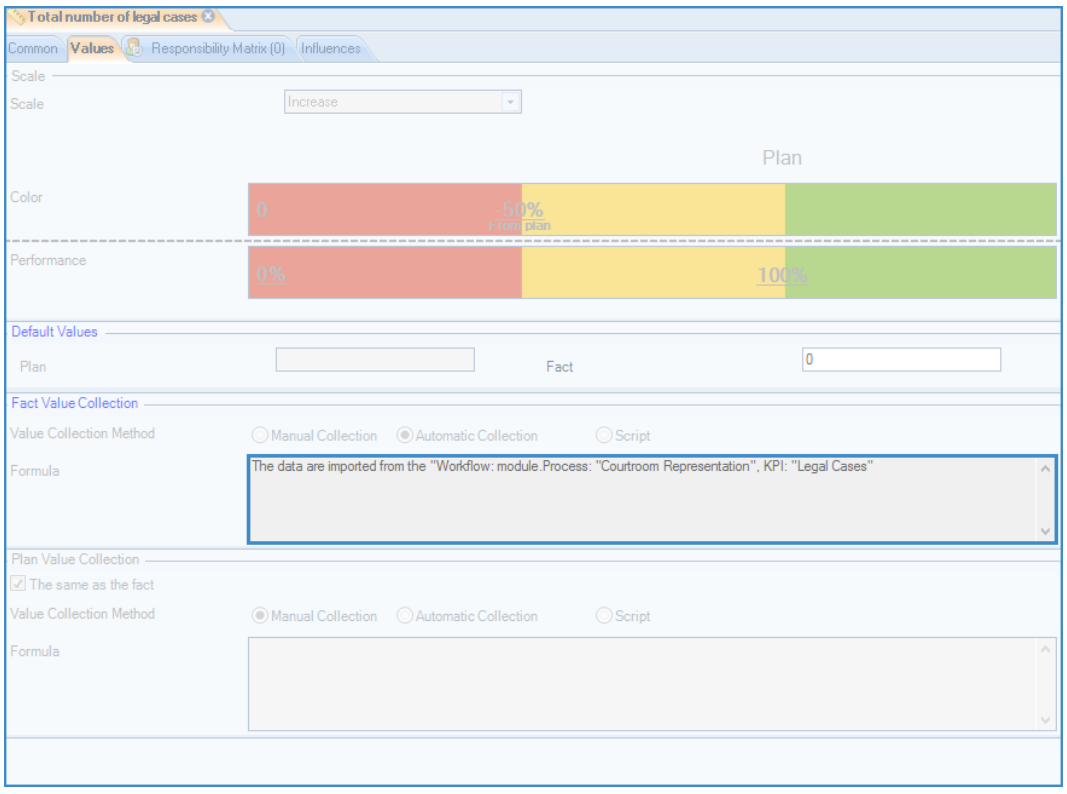


Fig. 42. Relationship between KPI and business process indicator

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).

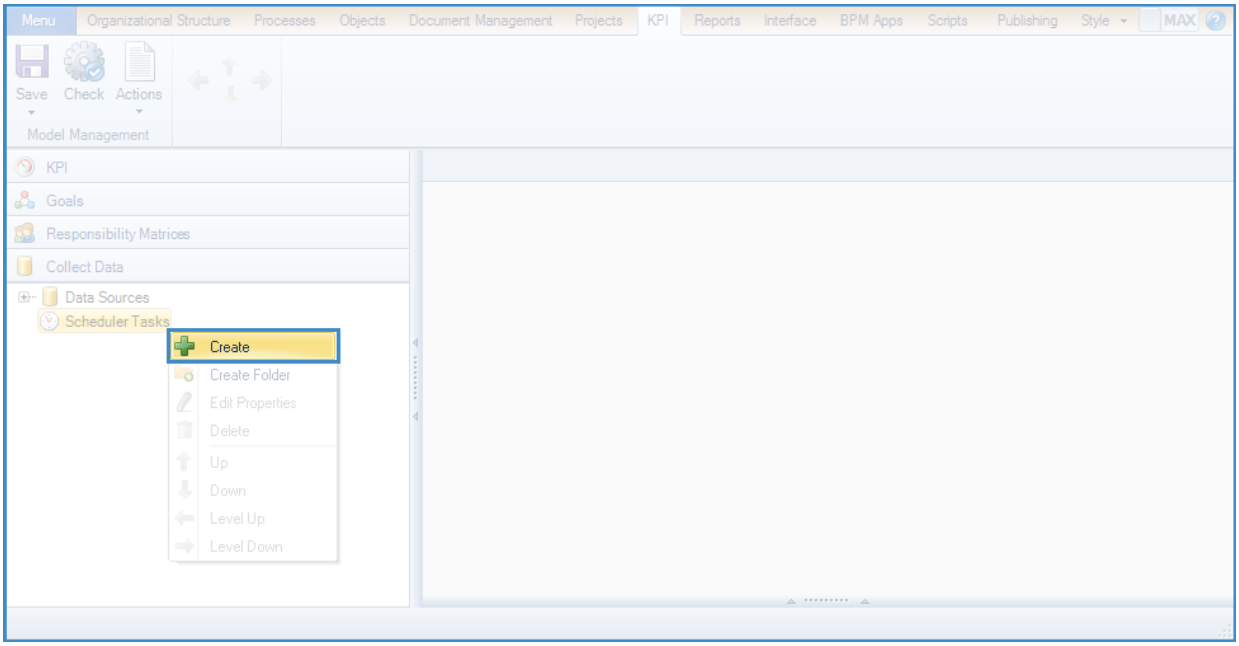


Fig. 43. Creating a scheduler task

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).

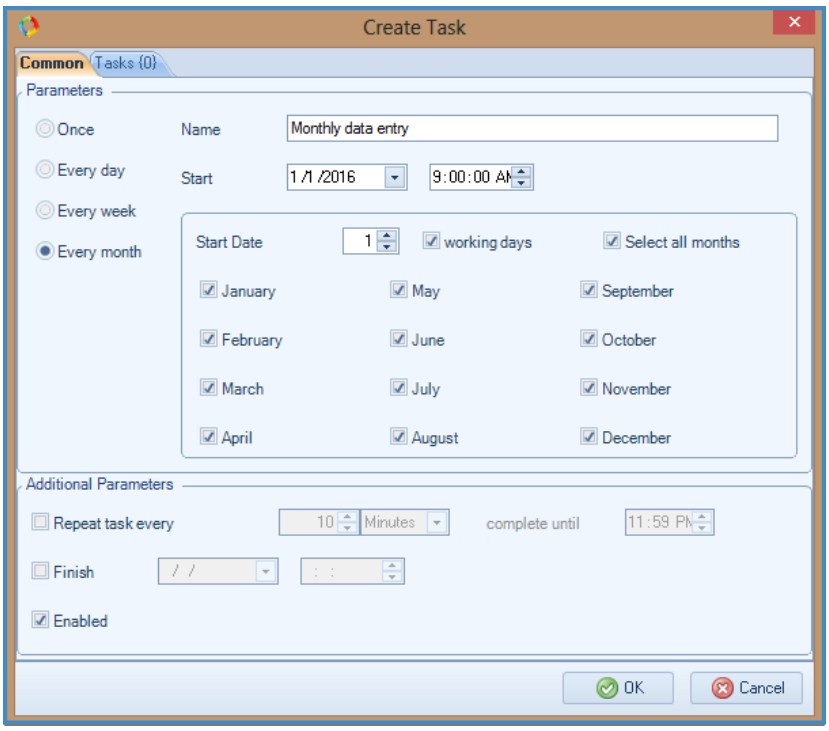


Fig. 44. Creating a schedule

- 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);

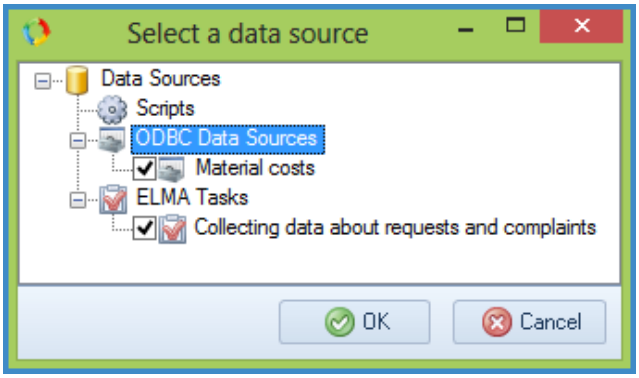


Fig. 45. Selecting the tasks

- 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).

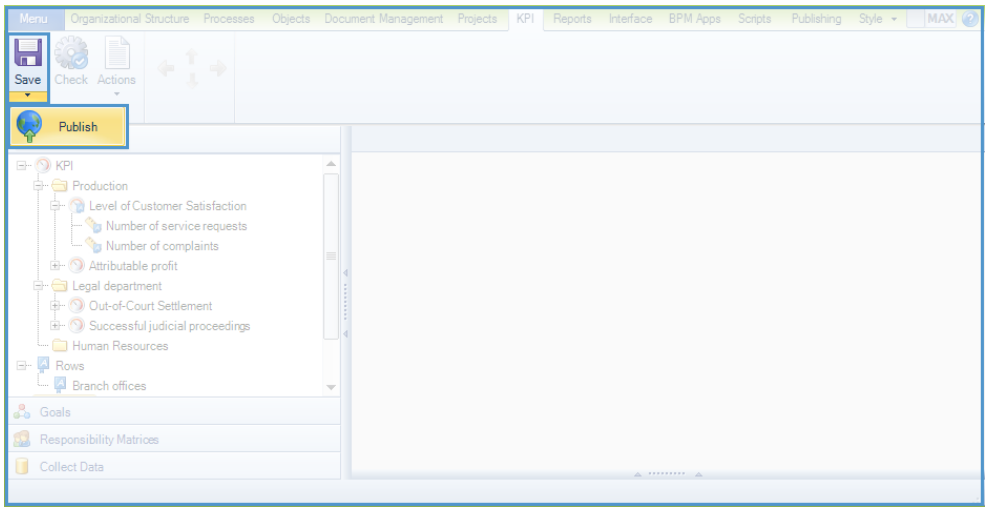


Fig. 46. Publish button

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.

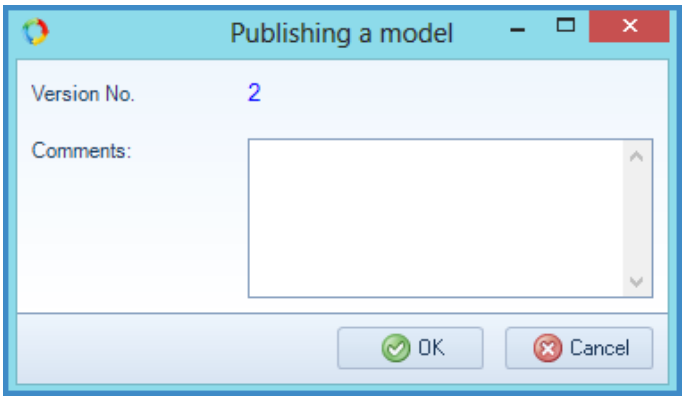


Fig. 47. Publishing a model window

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**.

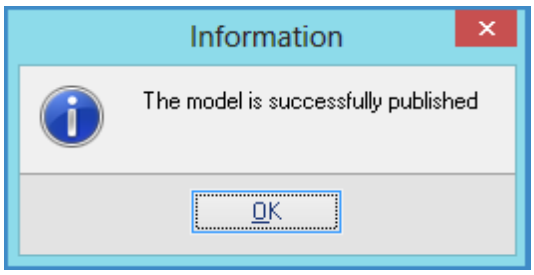


Fig. 48. Notification on successful publication

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)

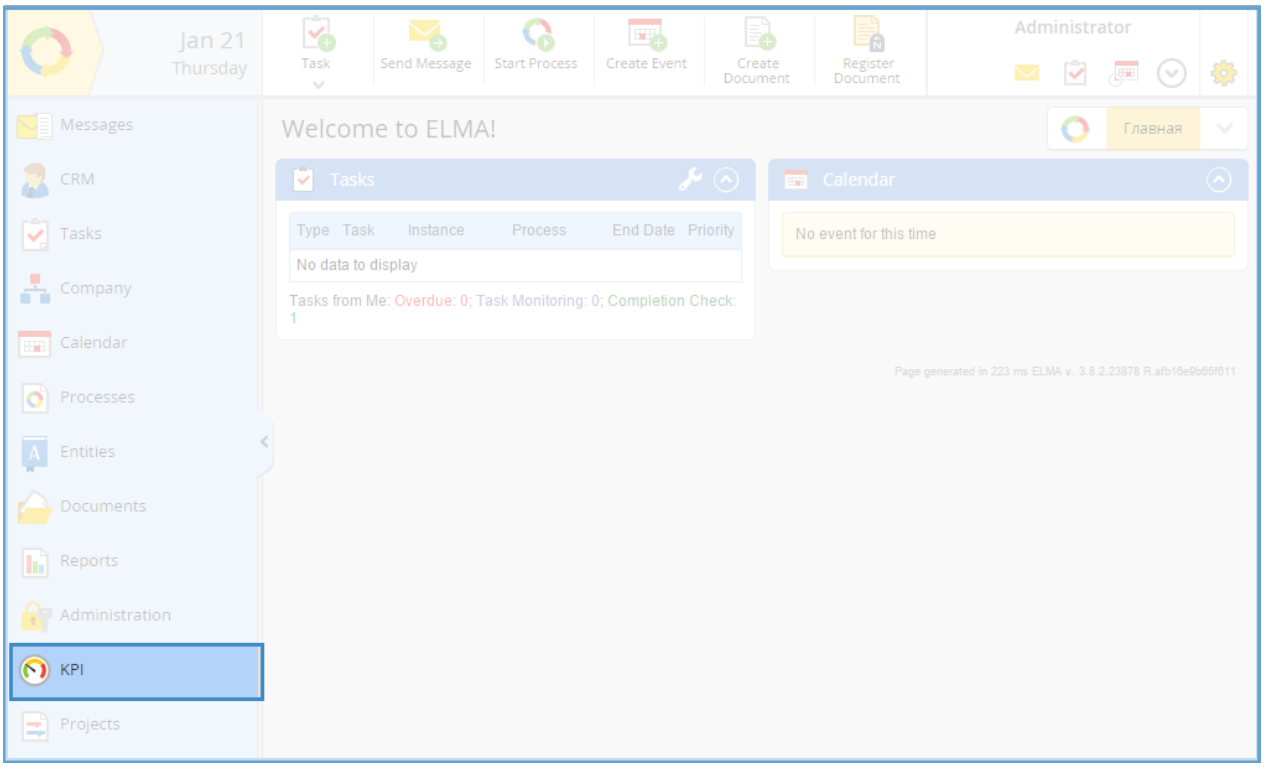


Fig. 49. KPI section in the left-hand menu

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

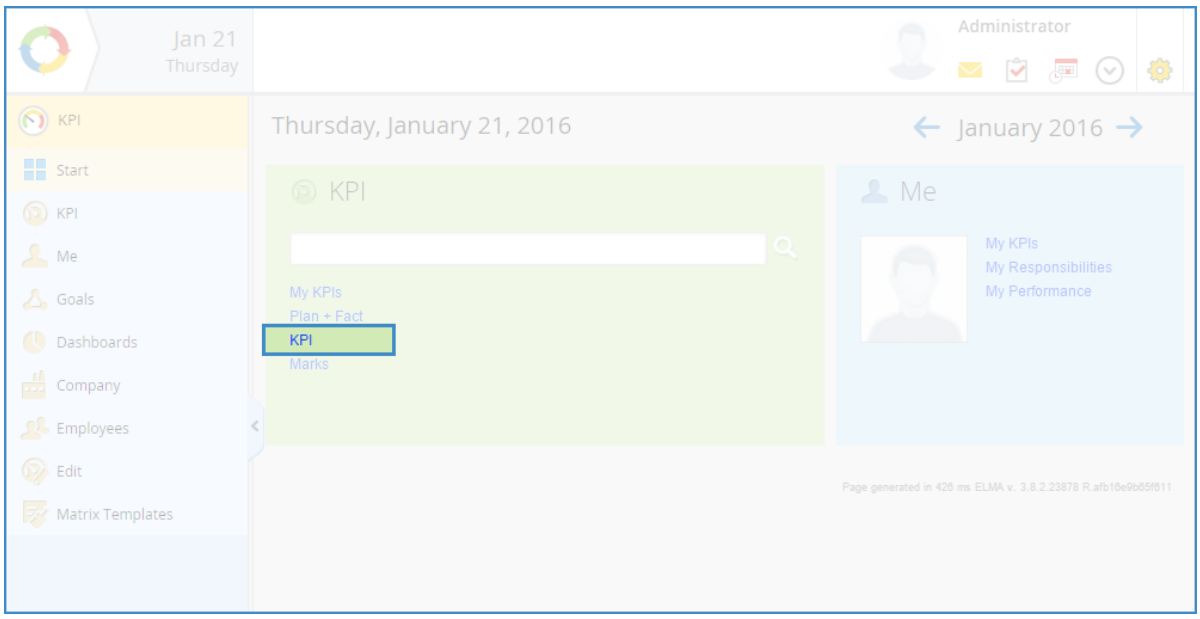


*Fig. 50. **ELMA KPI** home page*

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).

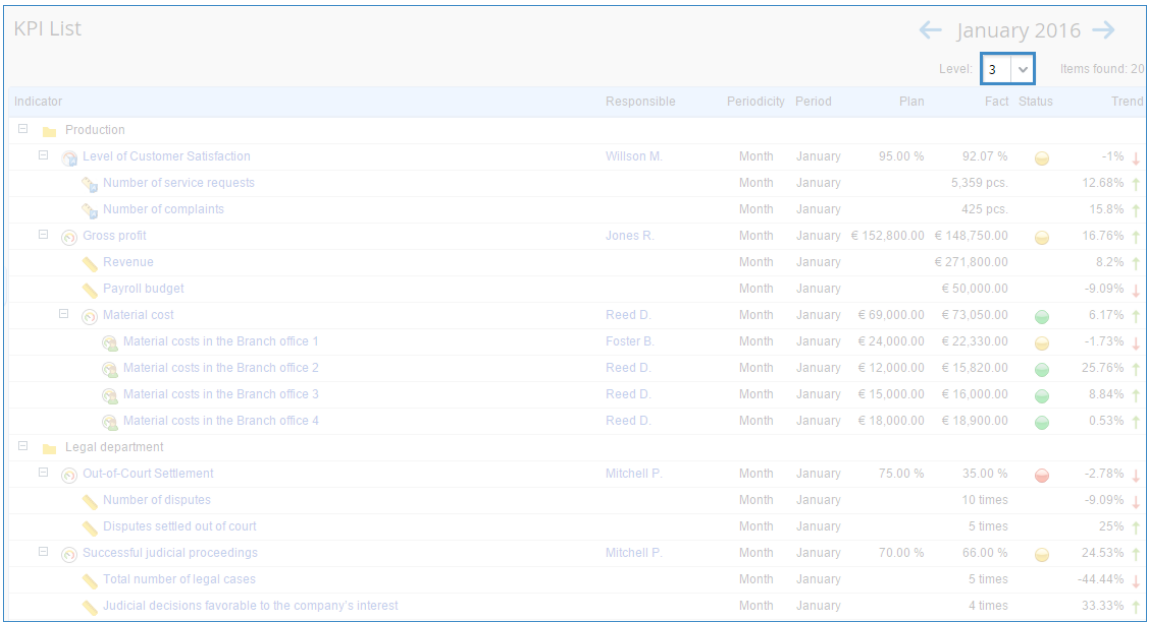


Fig. 51. Selecting the expansion level

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).

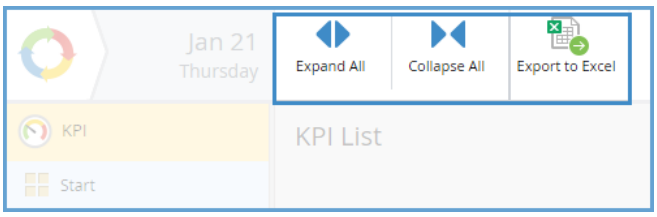


Fig. 52. Top menu bar

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).

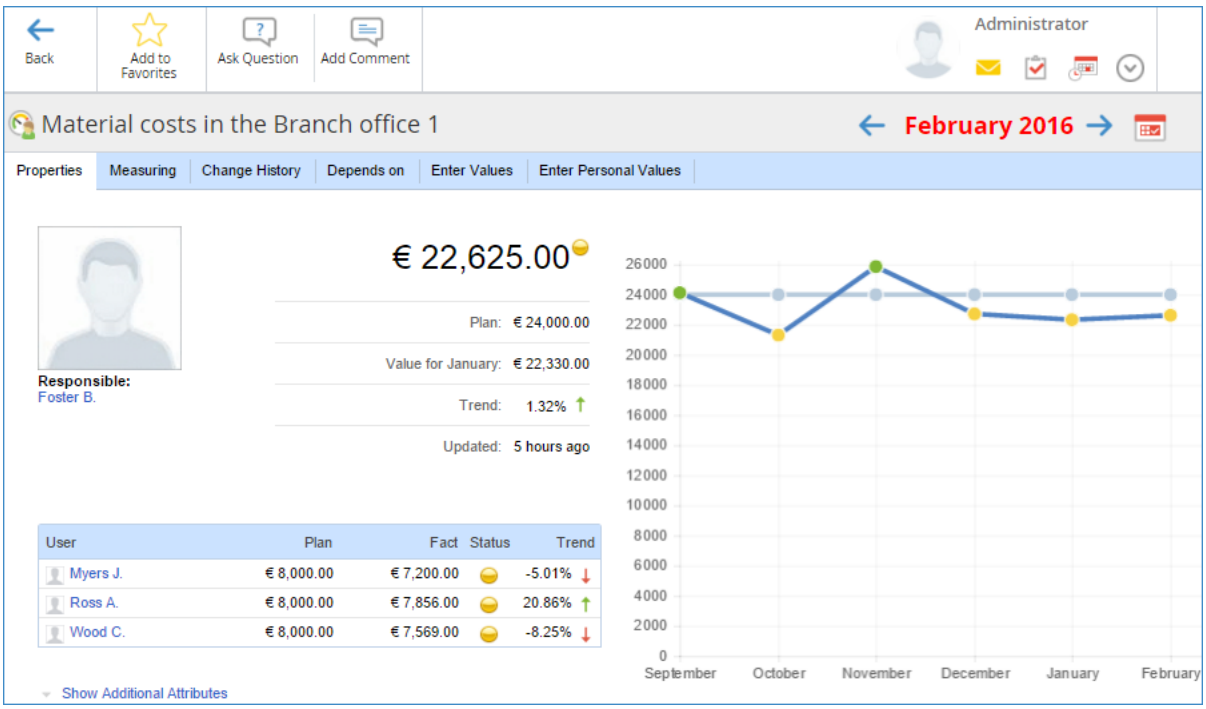


Fig. 53. Material costs in the Branch Office No.1 page

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).

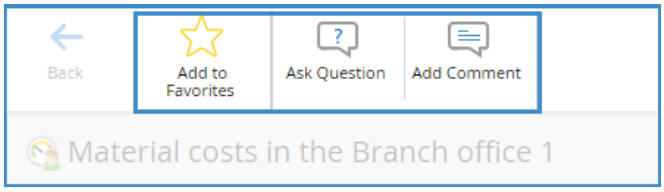


Fig. 54. KPI top menu bar

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

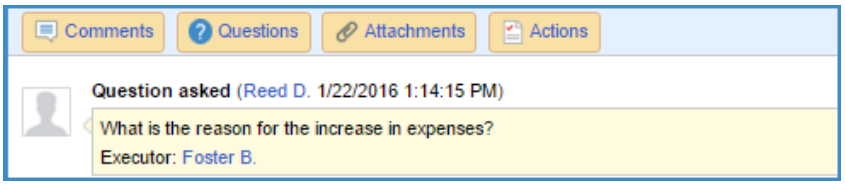


Fig. 55. Comments to the KPI

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.

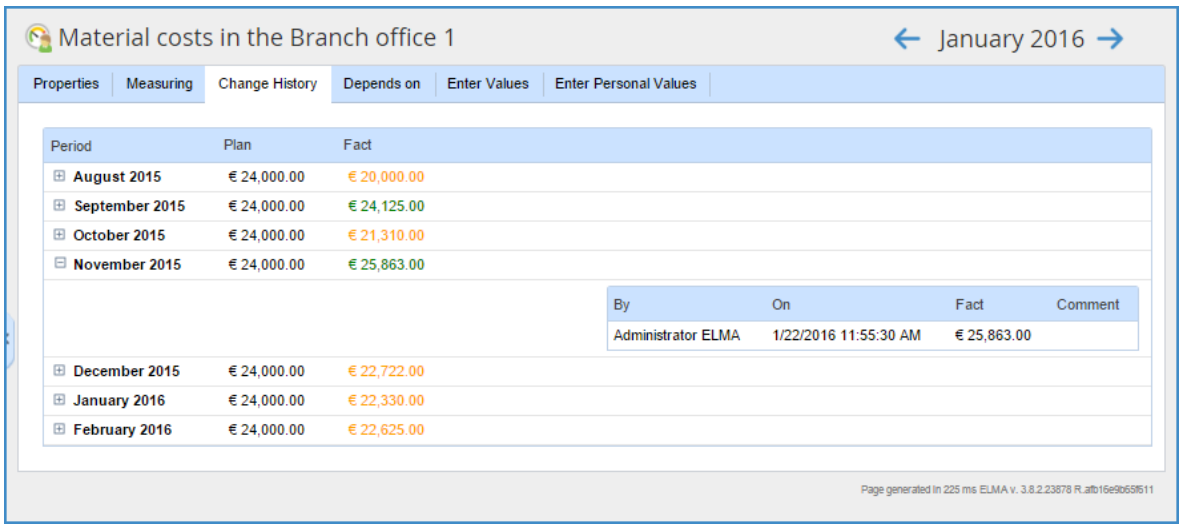


Fig. 56. Change History

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.

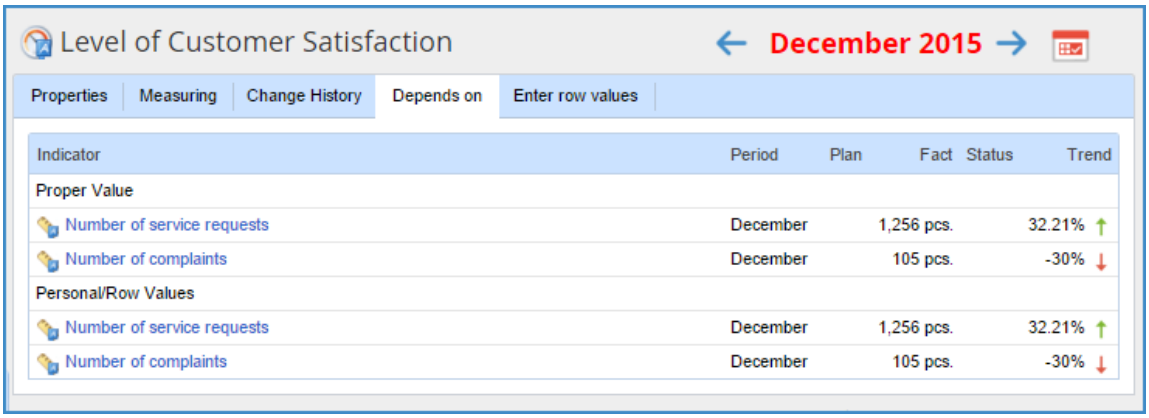
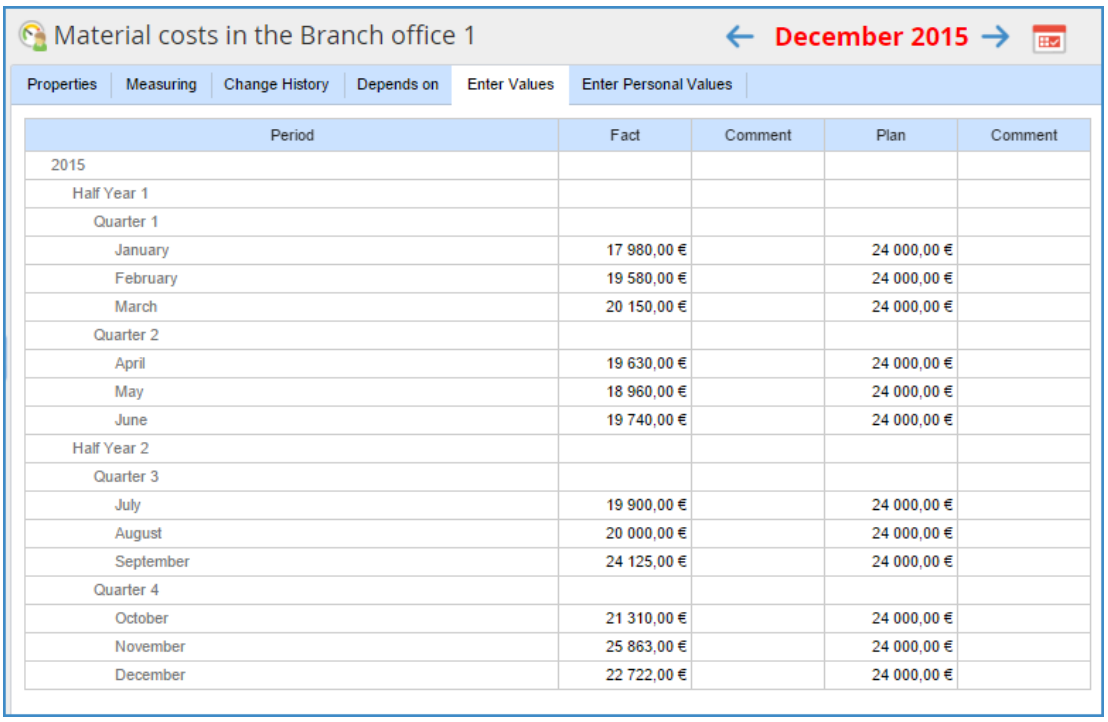


Fig. 57. Metrics used to calculate Level of Customer Satisfaction

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).

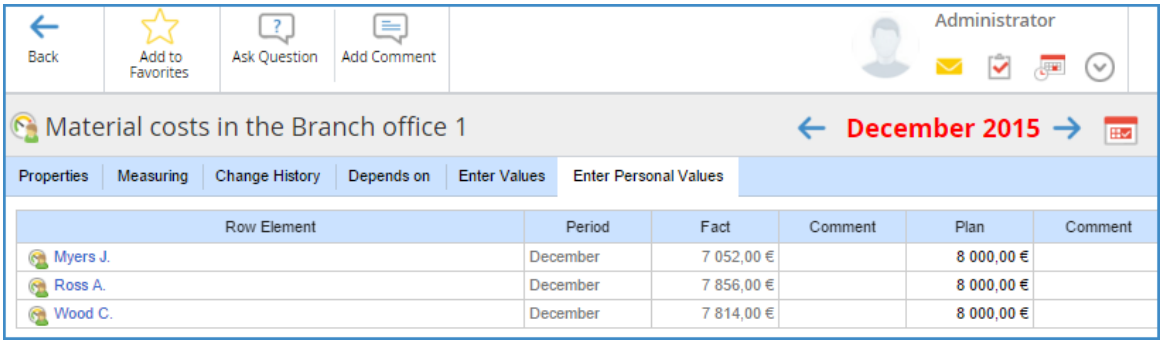


Period	Fact	Comment	Plan	Comment
2015				
Half Year 1				
Quarter 1				
January	17 980,00 €		24 000,00 €	
February	19 580,00 €		24 000,00 €	
March	20 150,00 €		24 000,00 €	
Quarter 2				
April	19 630,00 €		24 000,00 €	
May	18 960,00 €		24 000,00 €	
June	19 740,00 €		24 000,00 €	
Half Year 2				
Quarter 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).



Row Element	Period	Fact	Comment	Plan	Comment
Myers J.	December	7 052,00 €		8 000,00 €	
Ross A.	December	7 856,00 €		8 000,00 €	
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 → Me → My performance**.

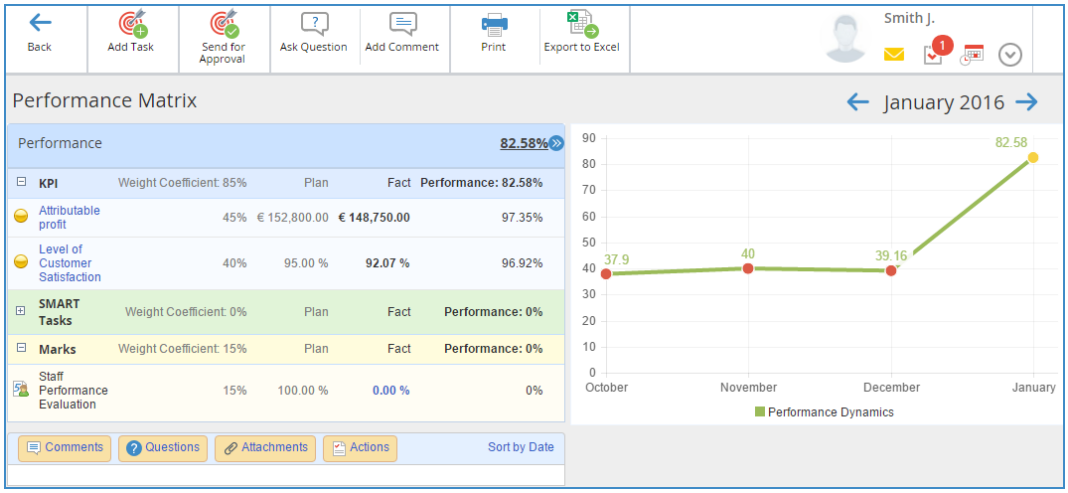


Fig. 60. Performance matrix example

To the right of the performance evaluation you will see a  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).

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).

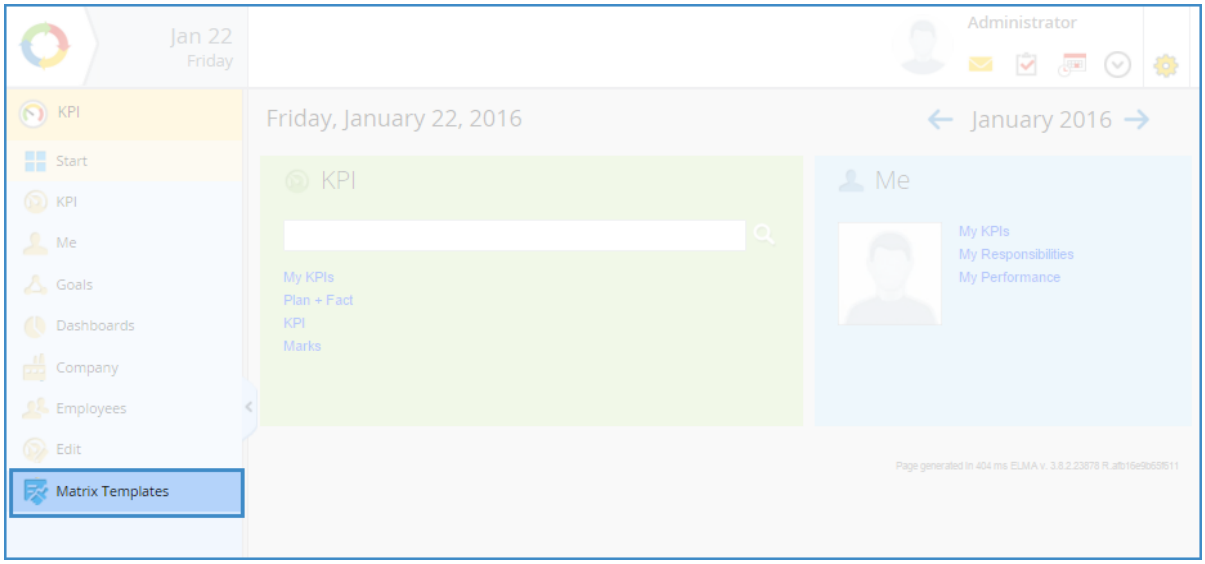


Fig. 62. Selecting Matrix Templates option

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

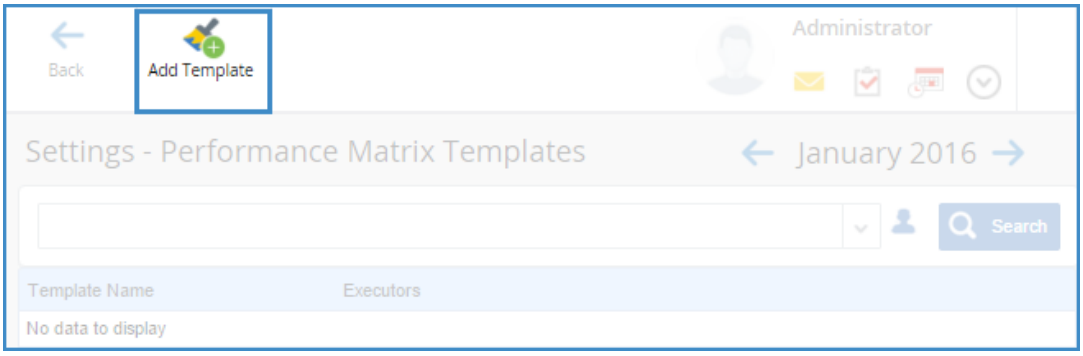


Fig. 63. Adding matrix template

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

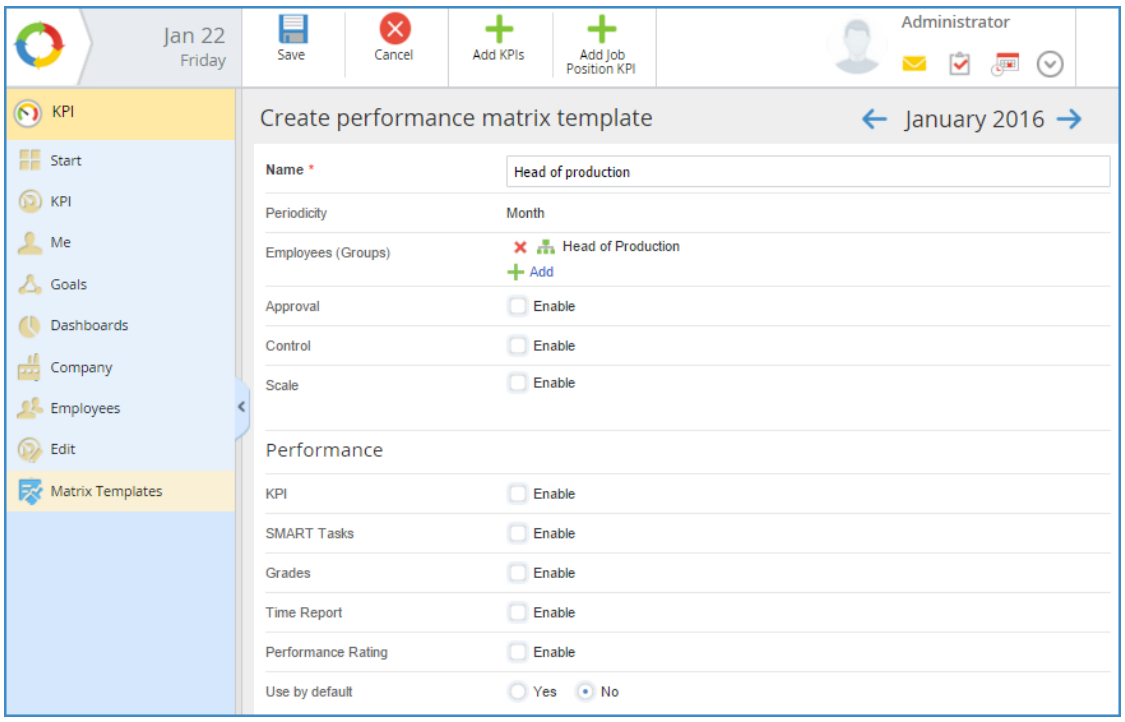


Fig. 64. Performance matrix template

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 **Select** button at the bottom of the window.

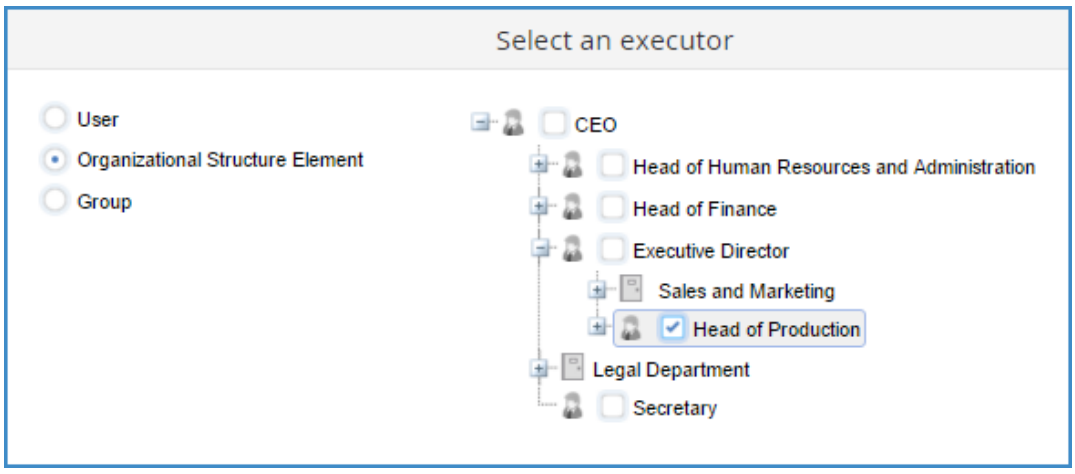


Fig. 65. Selecting an executor for matrix template

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.

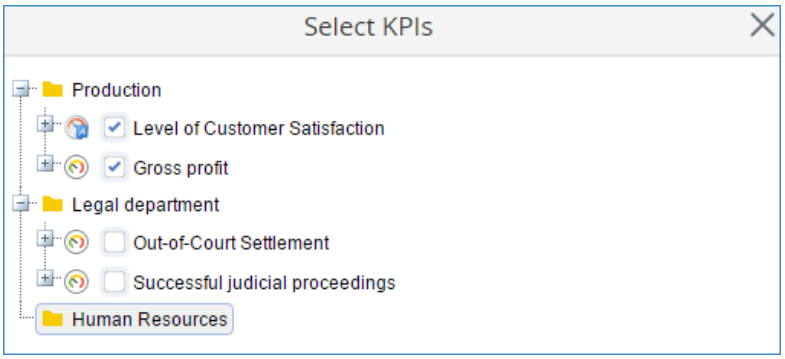


Fig. 66. Selecting KPI for performance matrix

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).

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).

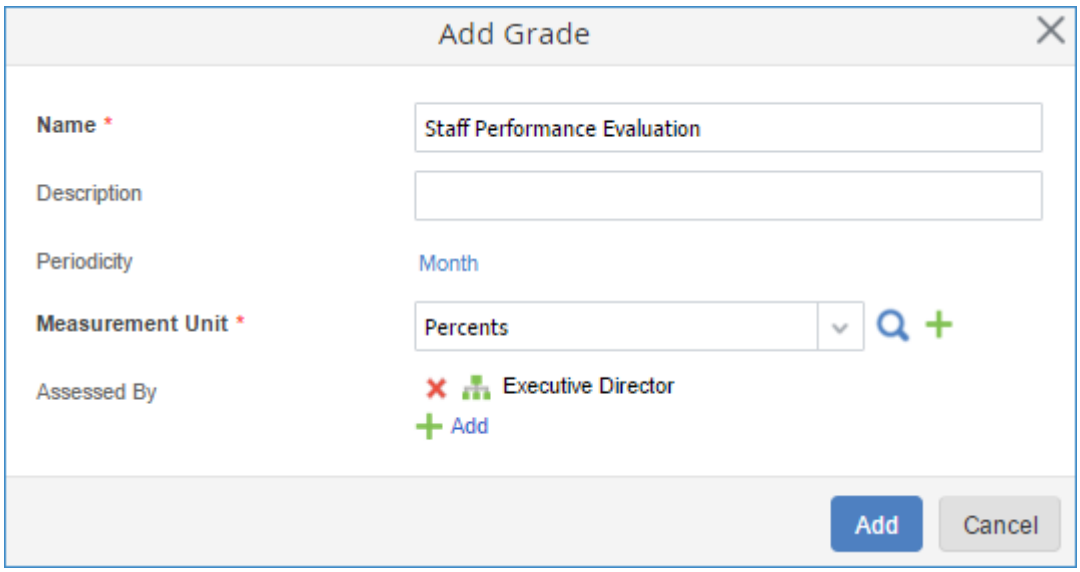


Fig. 68. Adding grade

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).

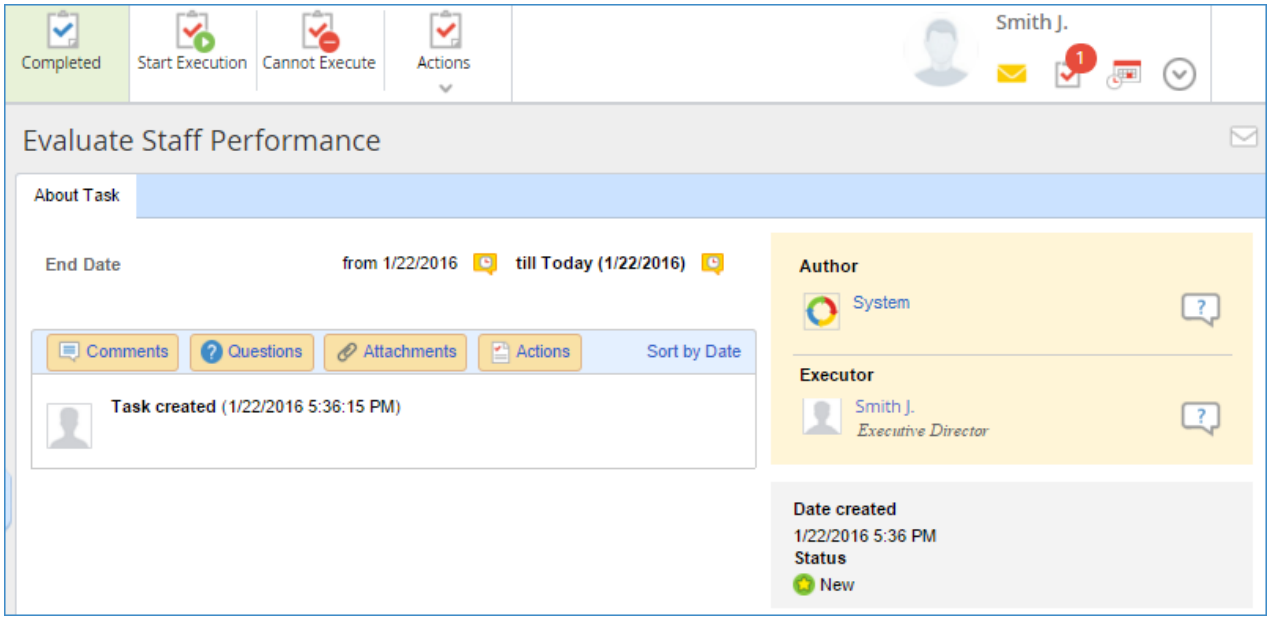


Fig. 69. Staff evaluation task

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):

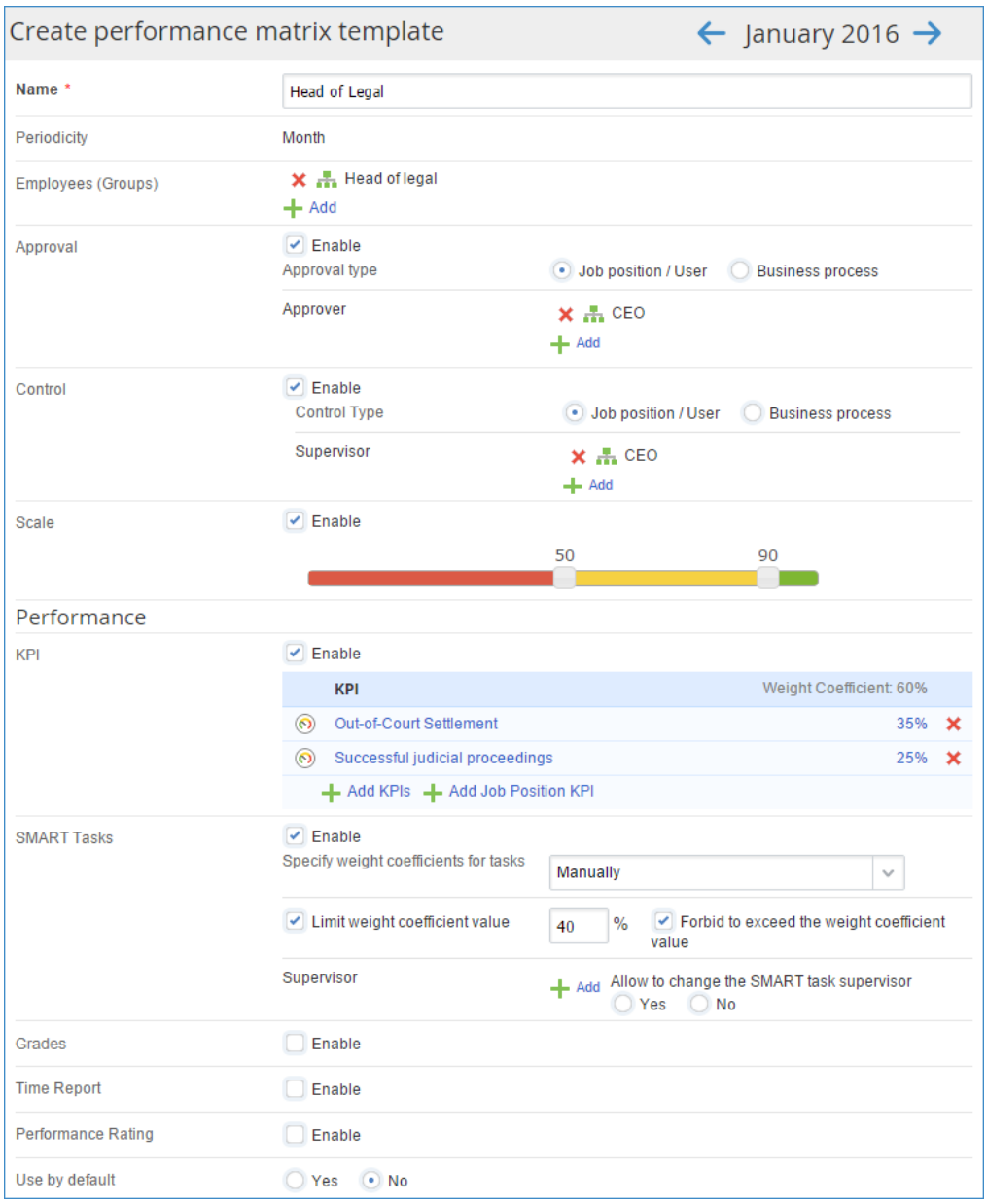


Fig. 70. Matrix template for the Head of Legal

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%.

Performance matrix template for the secretary will be as follows:

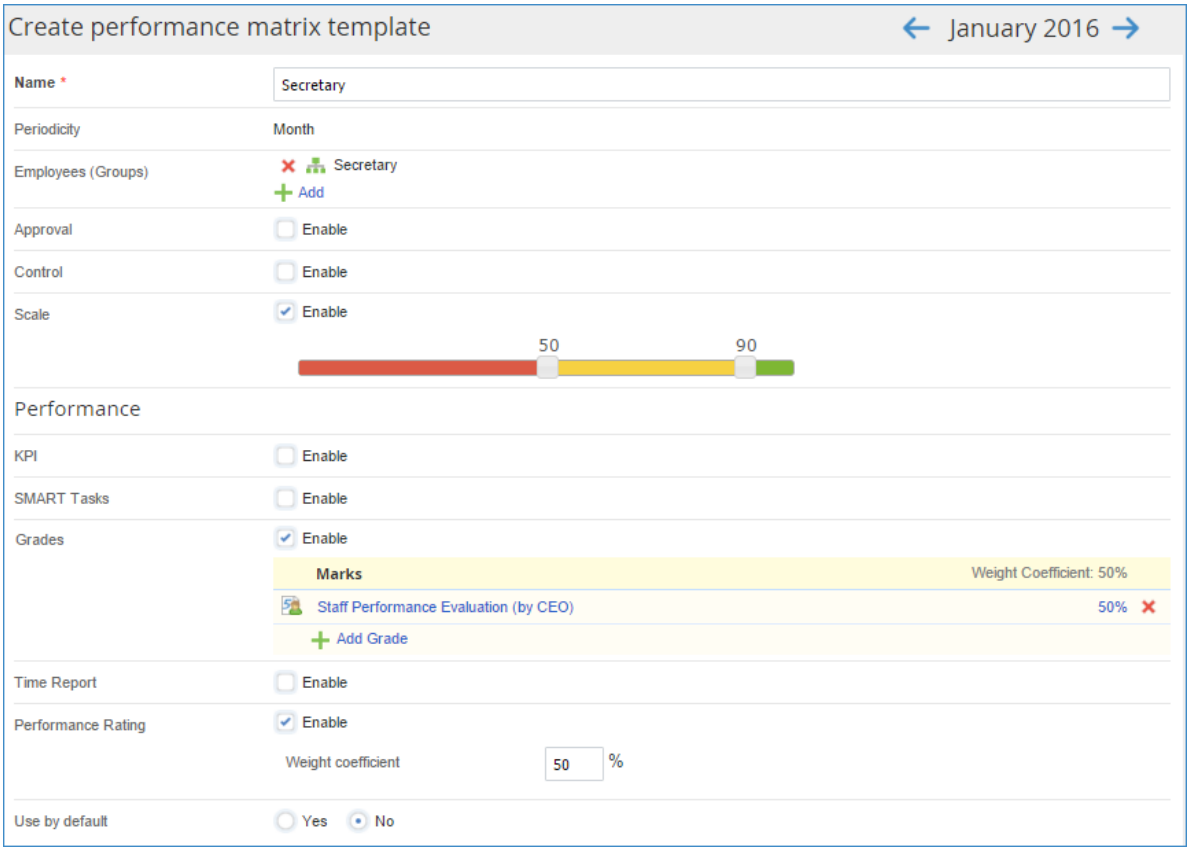


Fig. 71. Matrix template for the Secretary

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).

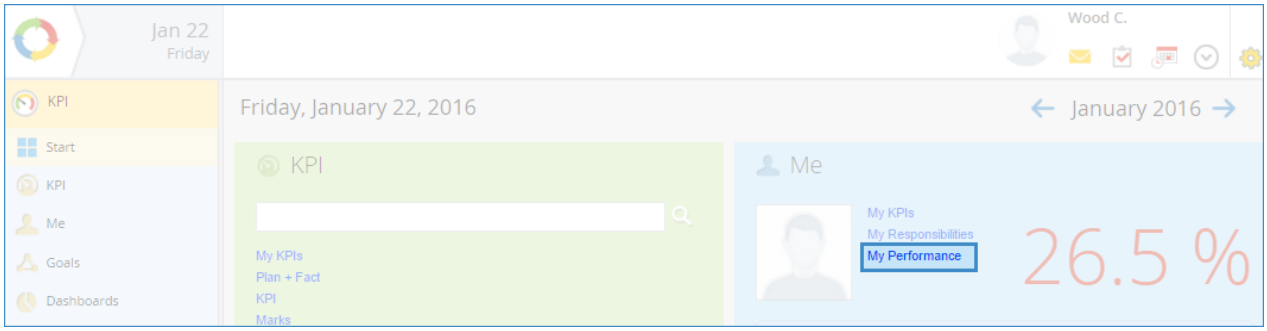


Fig. 72. Selecting performance matrix page

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.

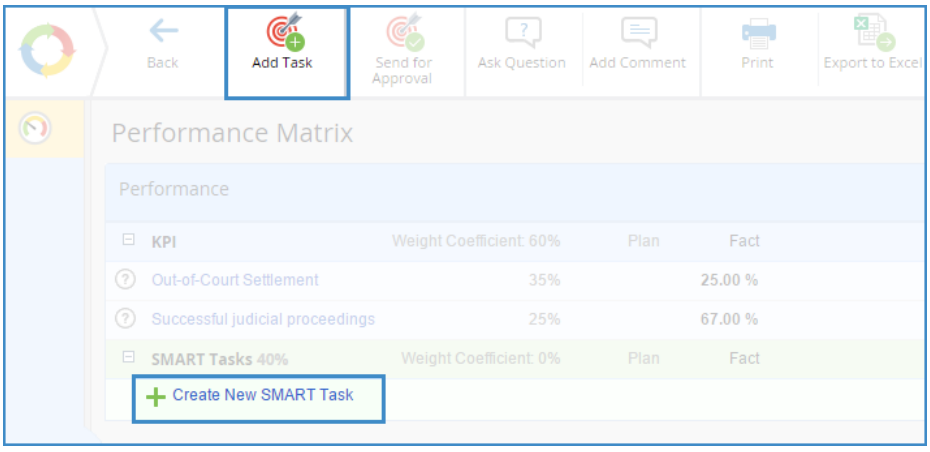


Fig. 73. Adding SMART task

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

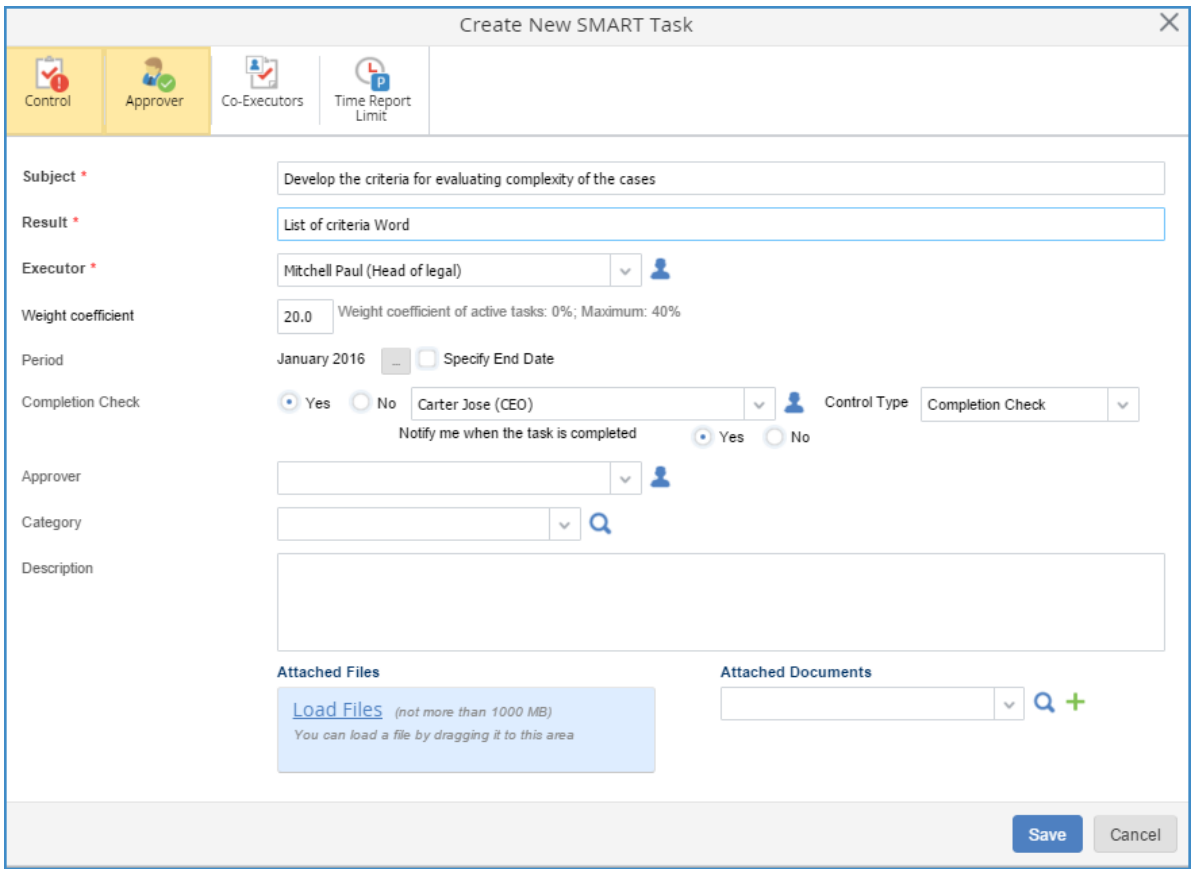


Fig. 74. SMART task parameters

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).

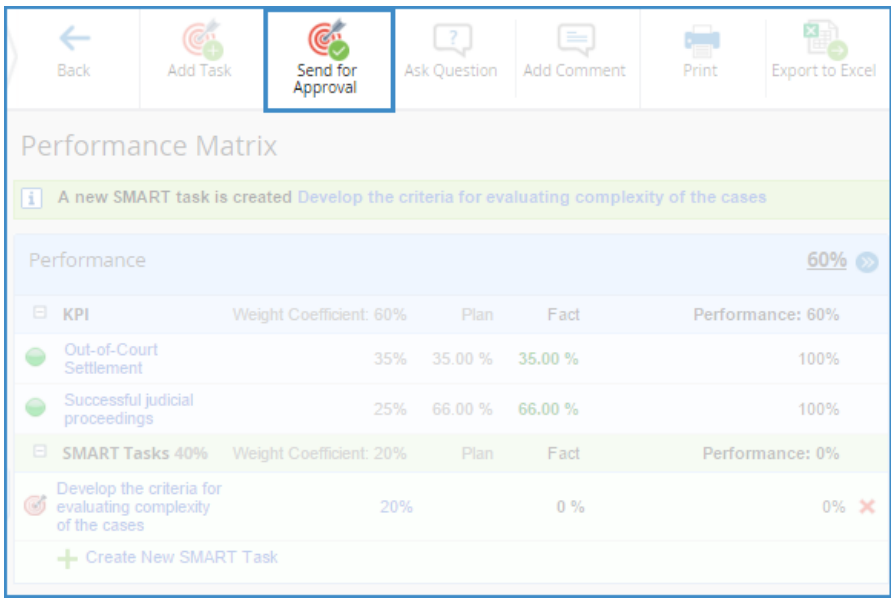


Fig. 75. Sending the matrix for approval

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).

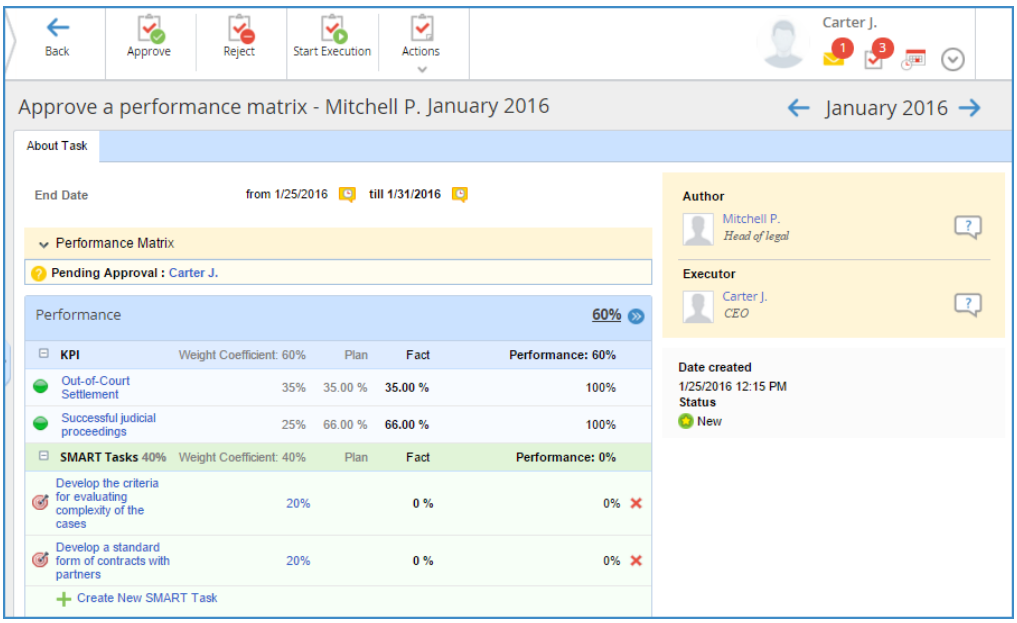


Fig. 76. Matrix approval task

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).

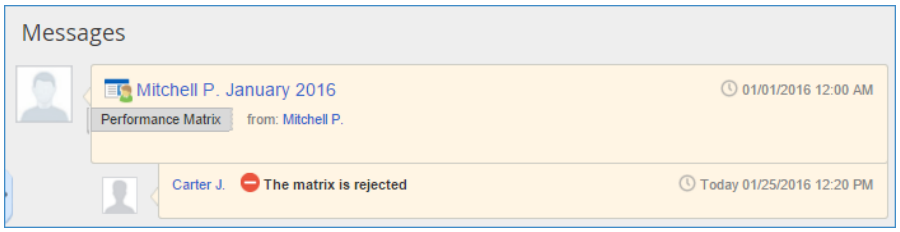


Fig. 77. Rejection notification

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).

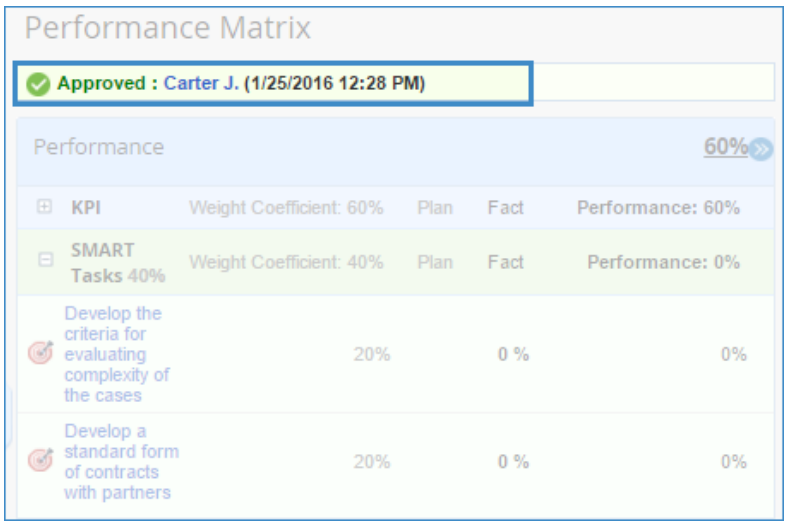


Fig. 78. Approval icon

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.

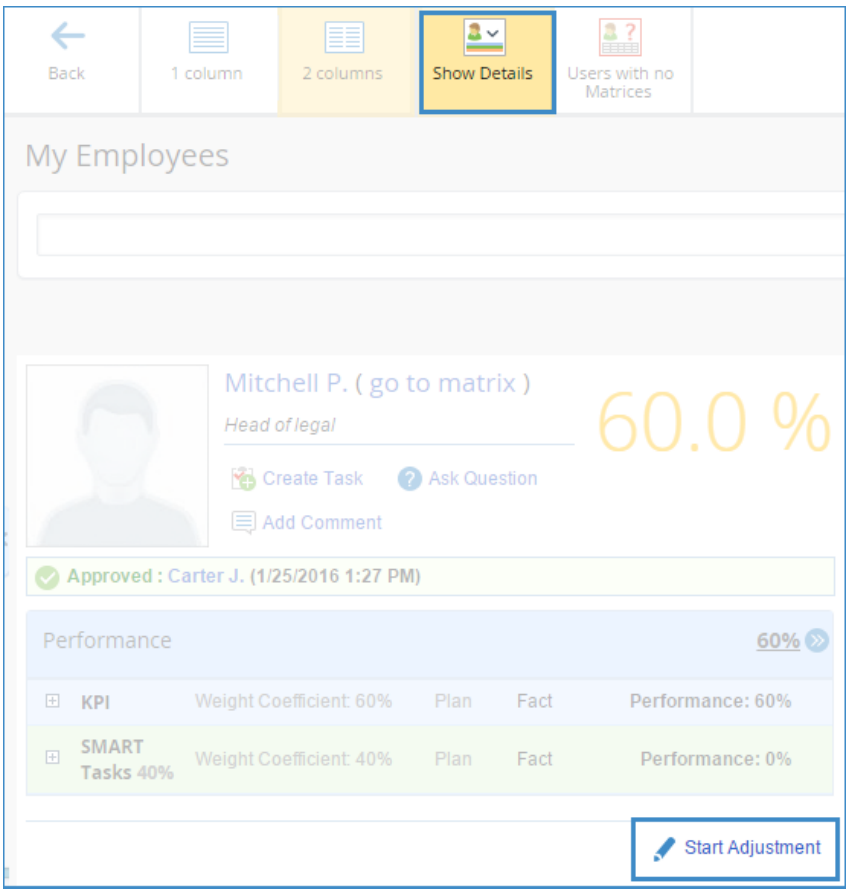


Fig. 79. Performance matrix adjustments

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.

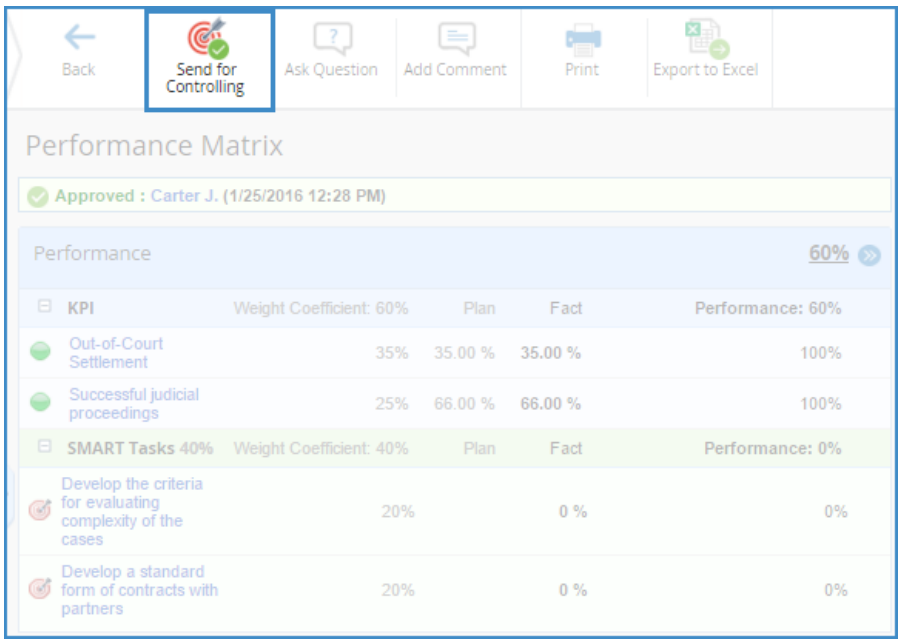


Fig. 80. Sending the matrix for controlling

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).

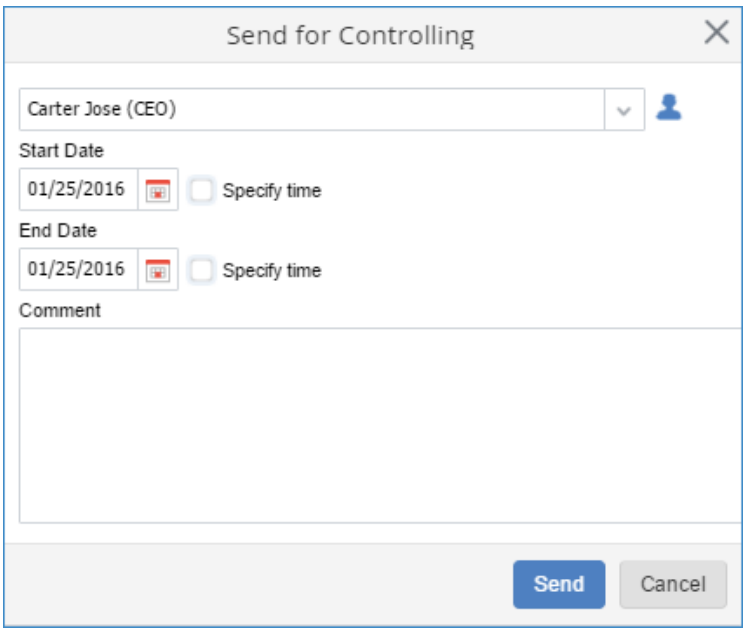


Fig. 81. Controlling parameters

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

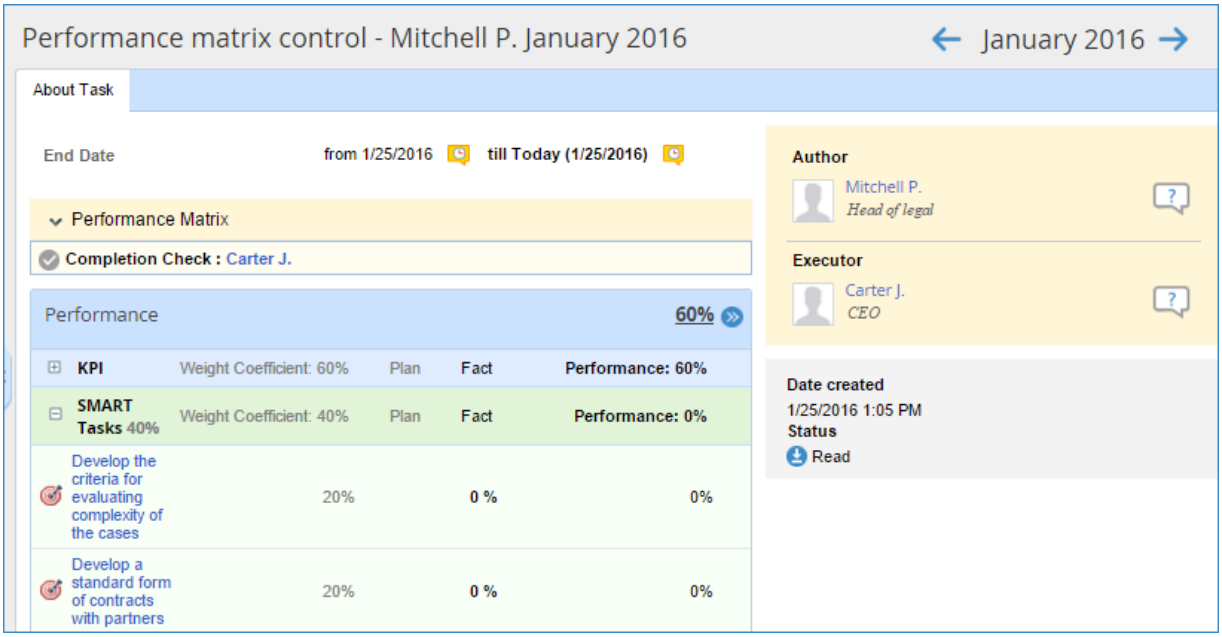


Fig. 82. Performance matrix control

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).

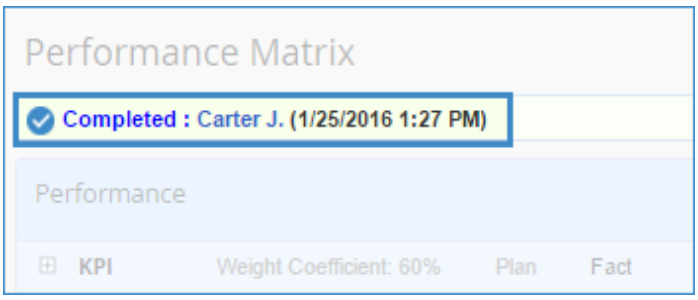


Fig. 83. Completion icon

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).

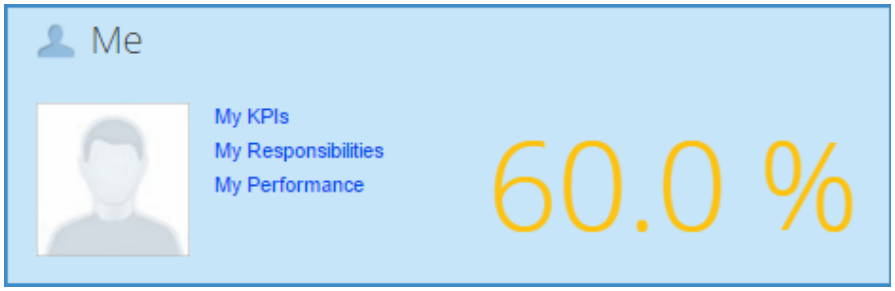


Fig. 84. Portlet with the performance ratio

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).

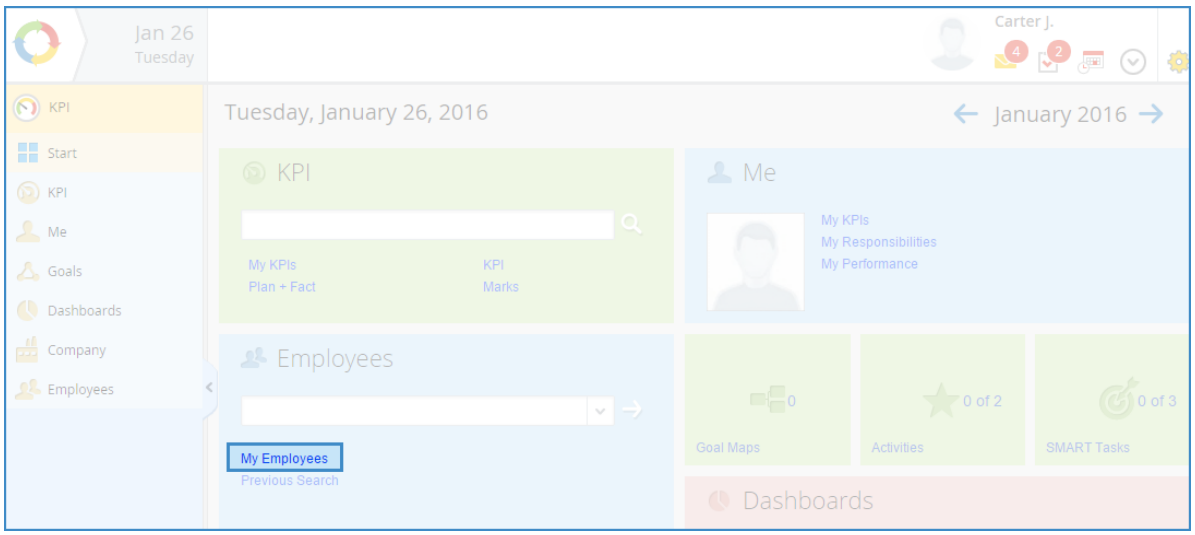


Fig. 85. Link to the All Employees page

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

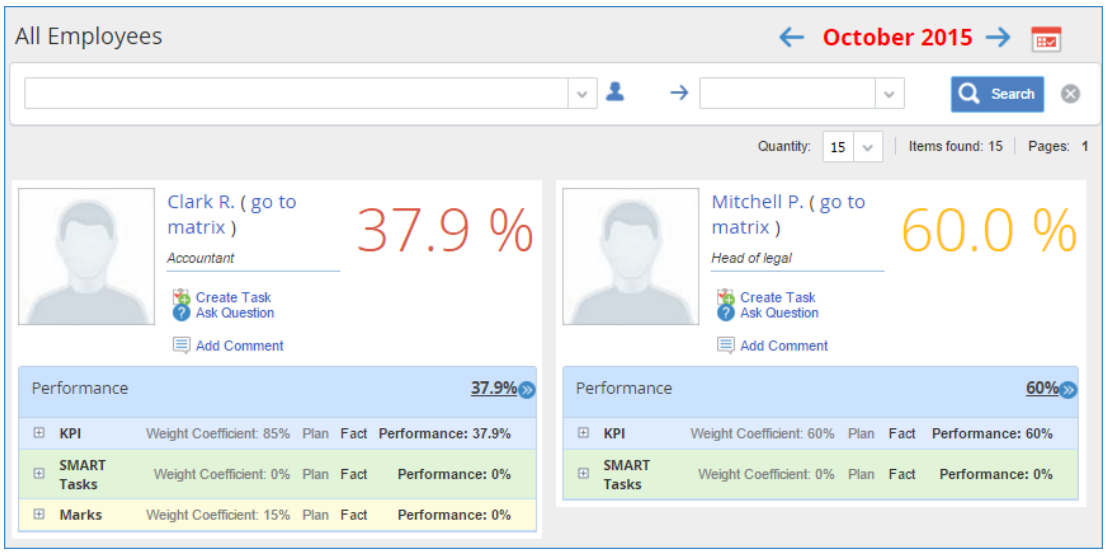


Fig. 86. Data on employees' efficiency

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)

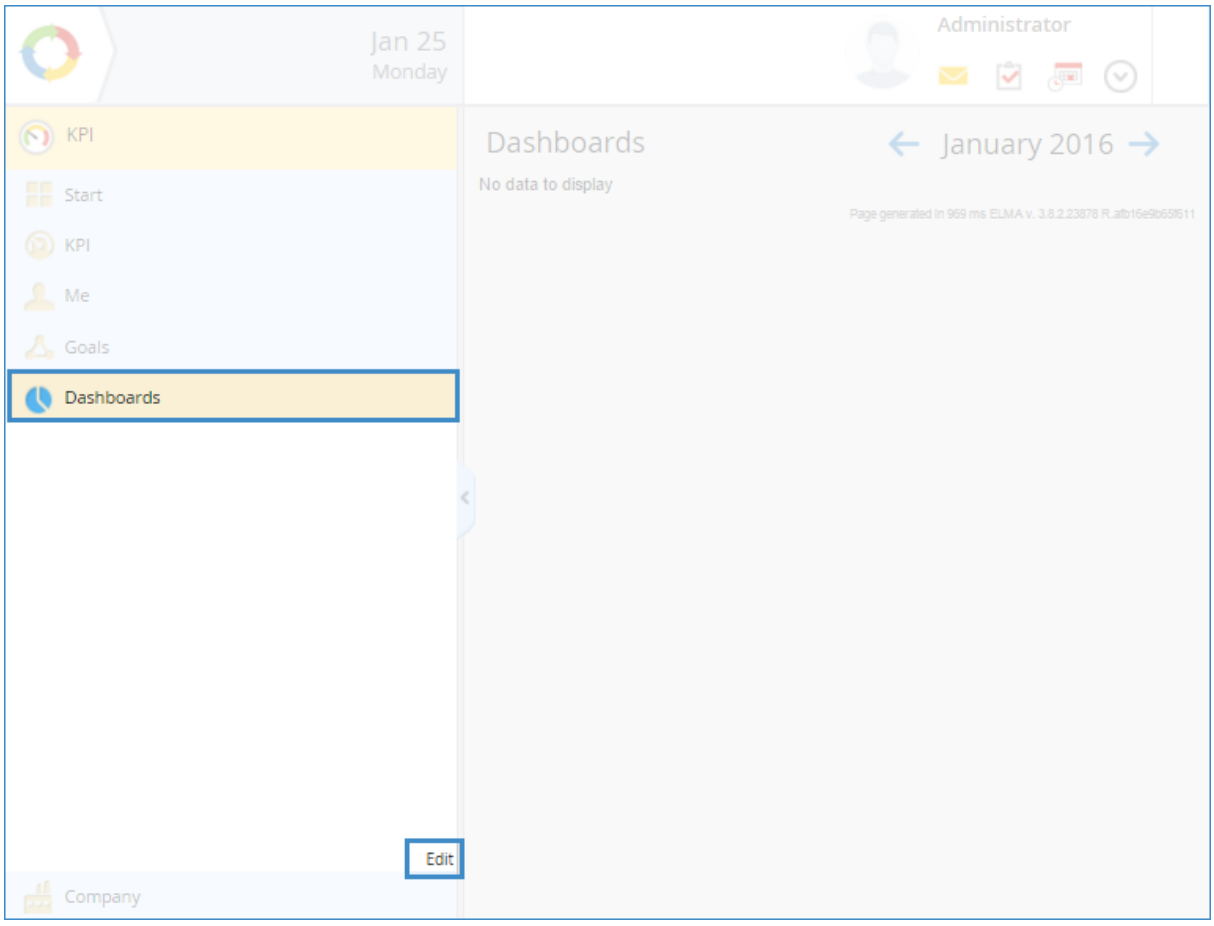


Fig. 87. Dashboard section of the web-application

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).

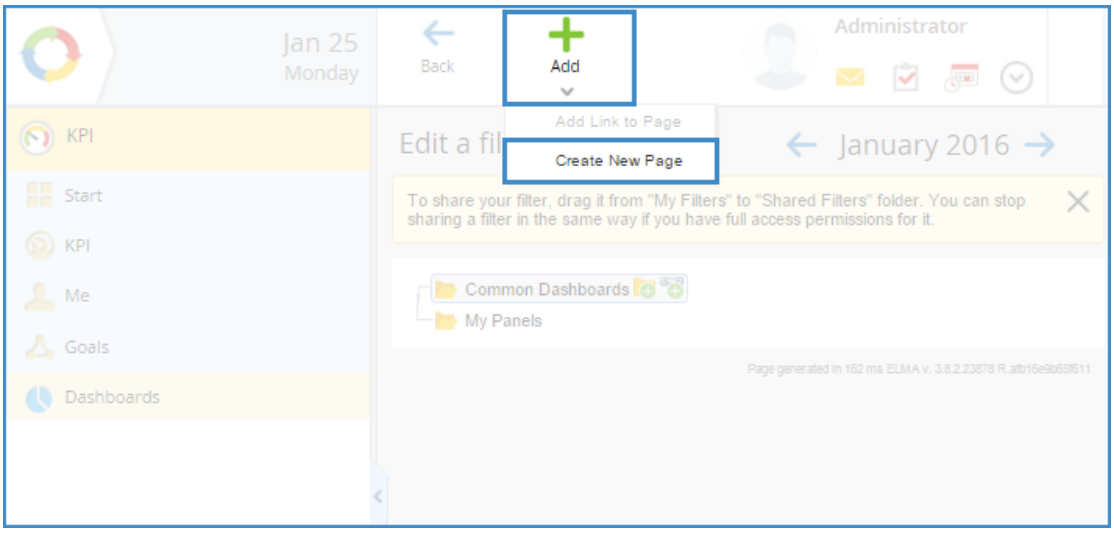


Fig. 88. Creating a dashboard

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

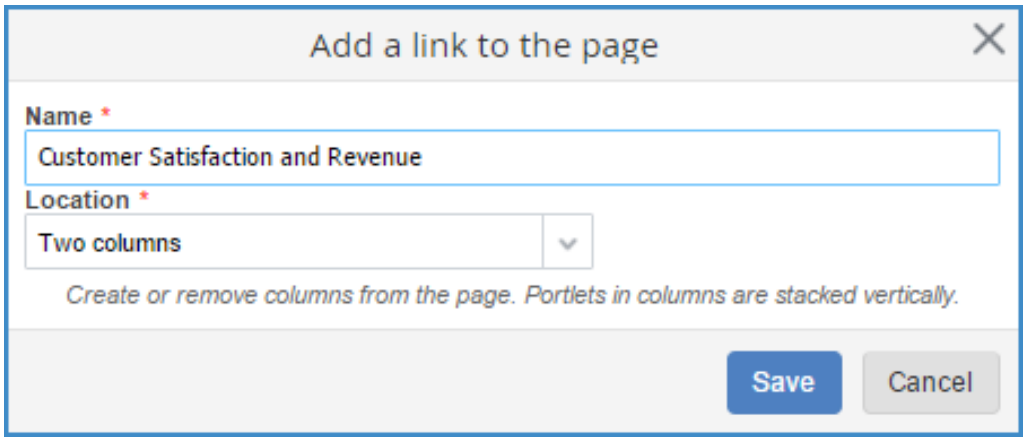


Fig. 89. Adding a link to the page

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

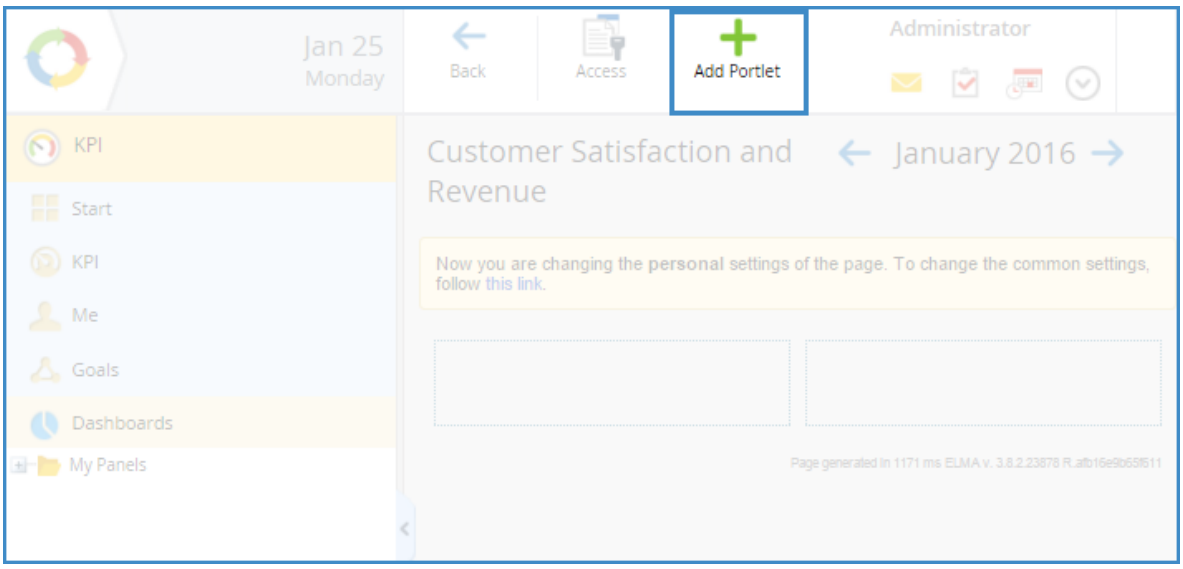


Fig. 90. Adding a portlet

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).

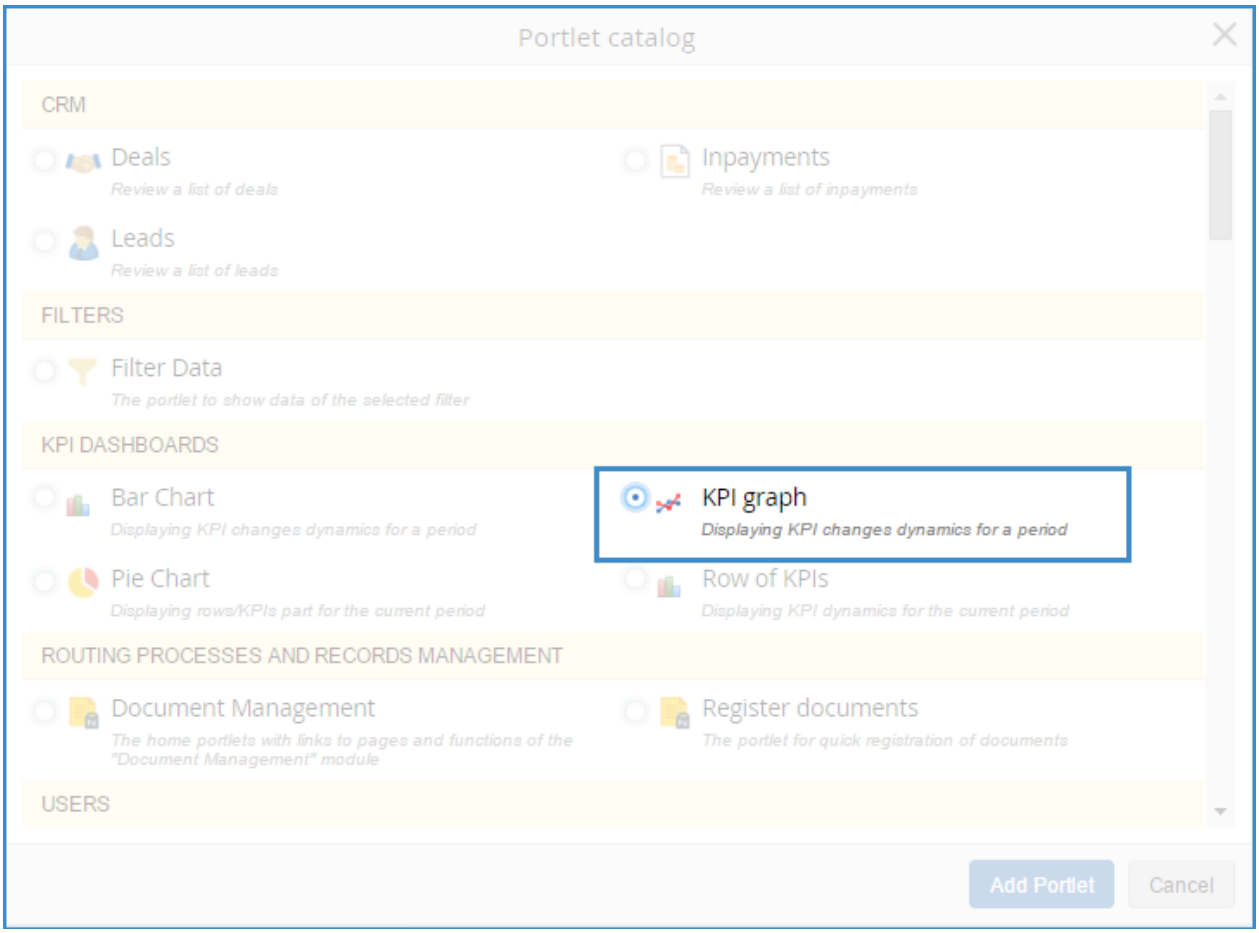


Fig. 91. Selecting KPI graph

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 button on the corresponding portlet (Fig. 92).

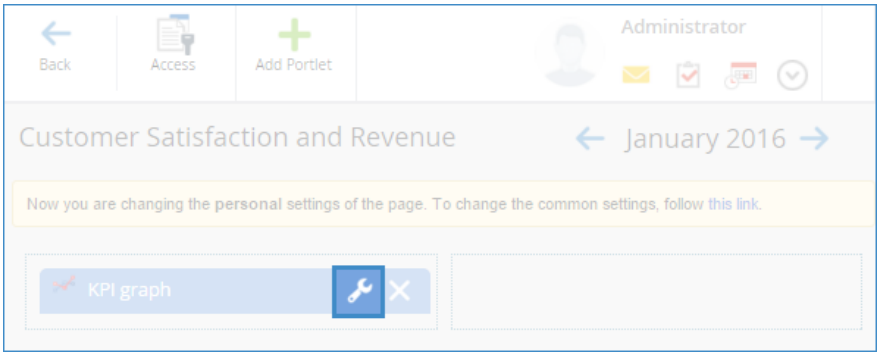


Fig. 92. Dashboard settings

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

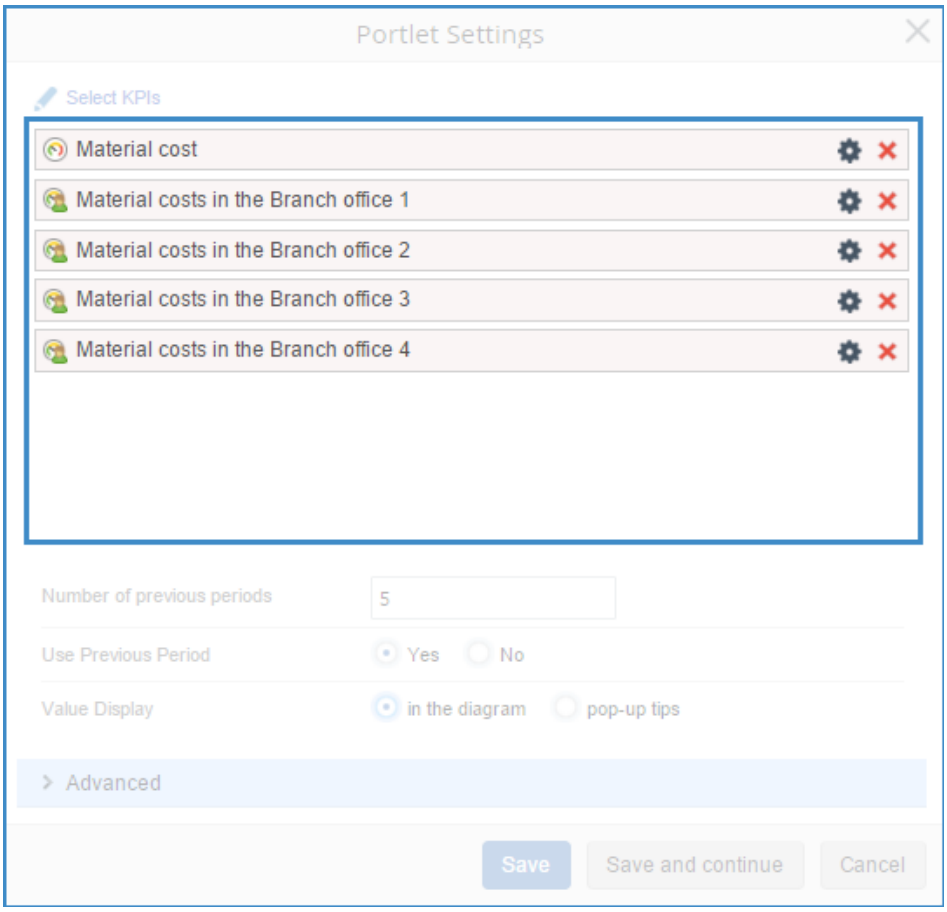


Fig. 93. Adding a KPI

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.

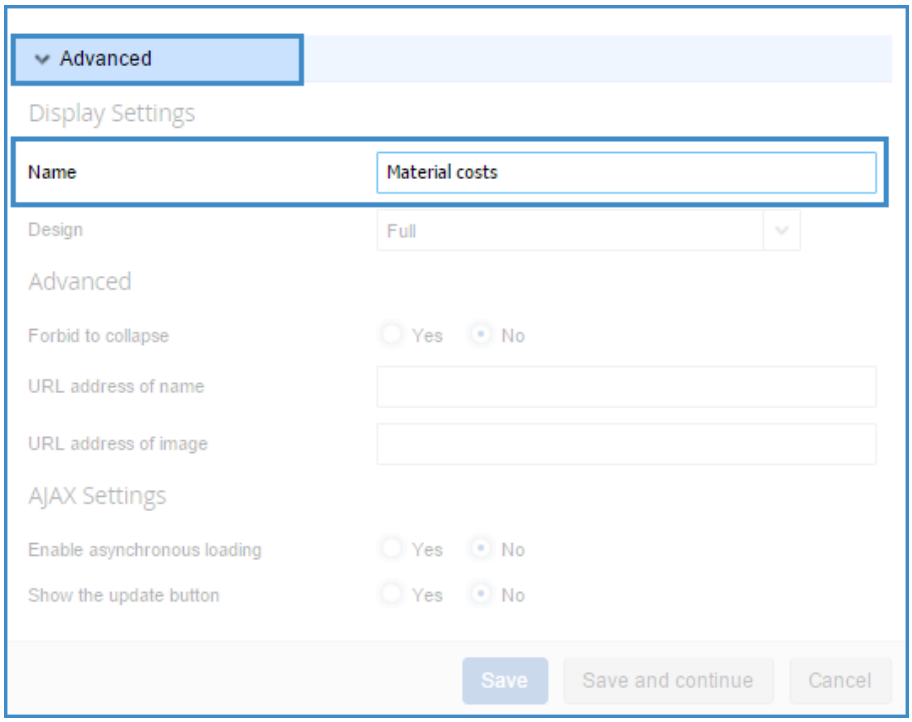


Fig. 94. Additional settings of the portlet

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.

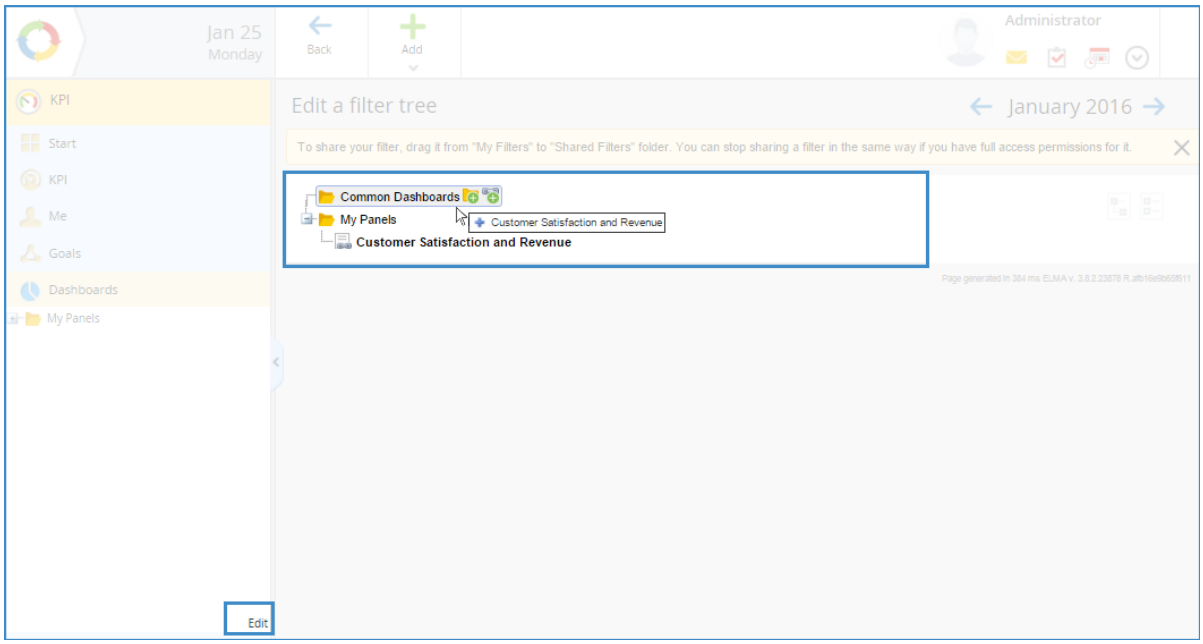


Fig. 95. Moving the panel to the Common Dashboards folder

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

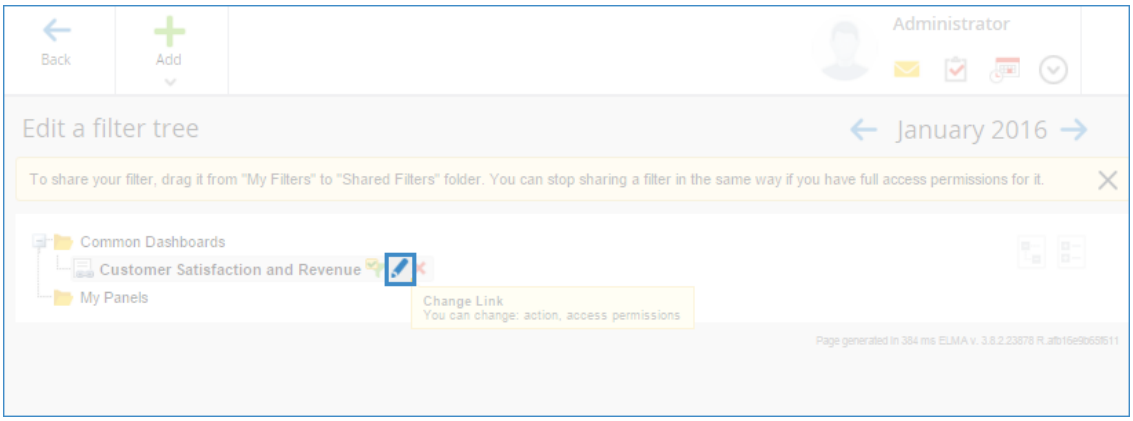


Fig. 96. Changing the link parameters

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).

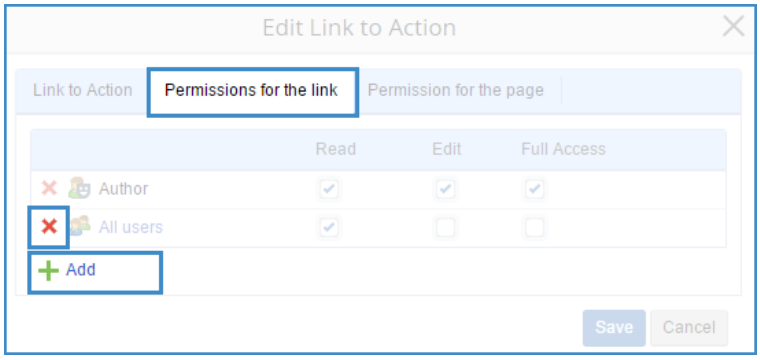


Fig. 97. Changing permissions for the link

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).

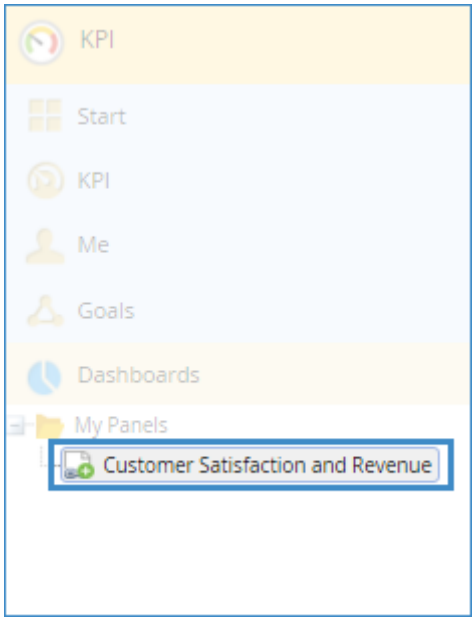


Fig. 98. List of dashboards

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

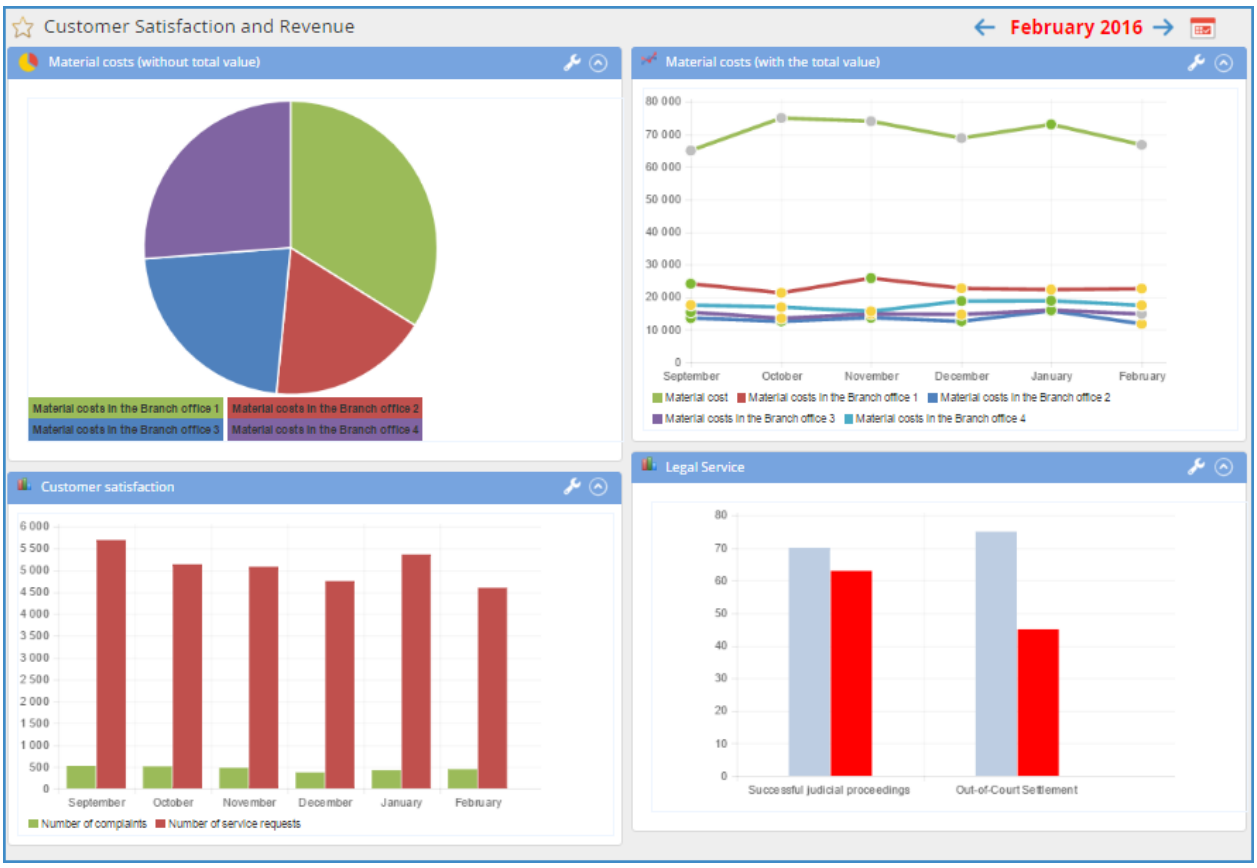


Fig. 99. Created dashboards

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).

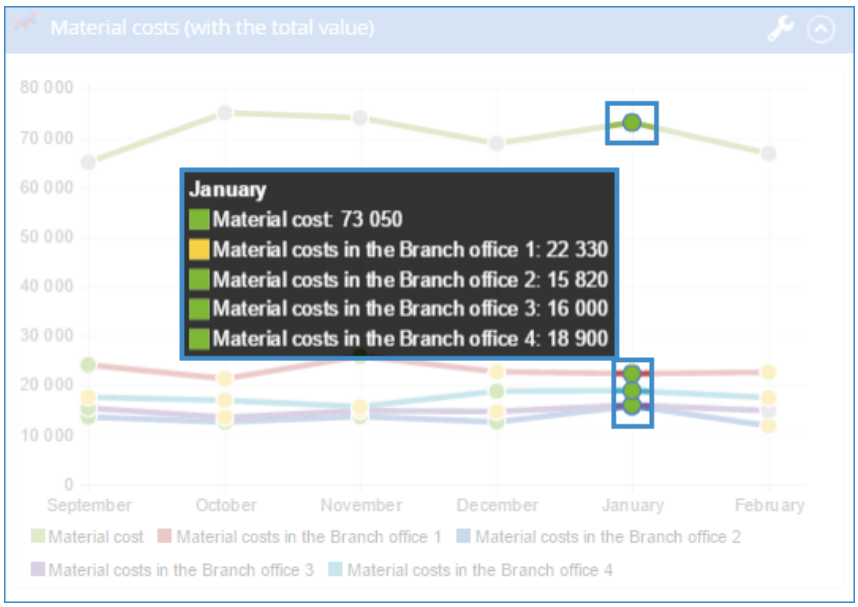


Fig. 100. Pop-up KPI values

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)

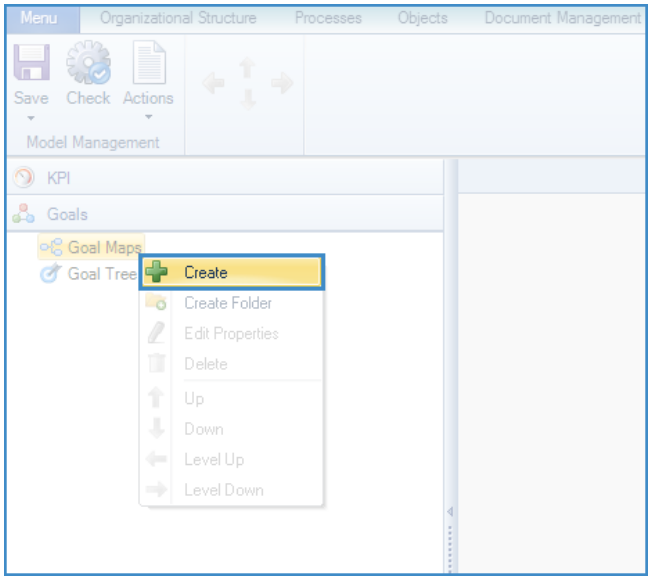


Fig. 101. Creating a goal map

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.

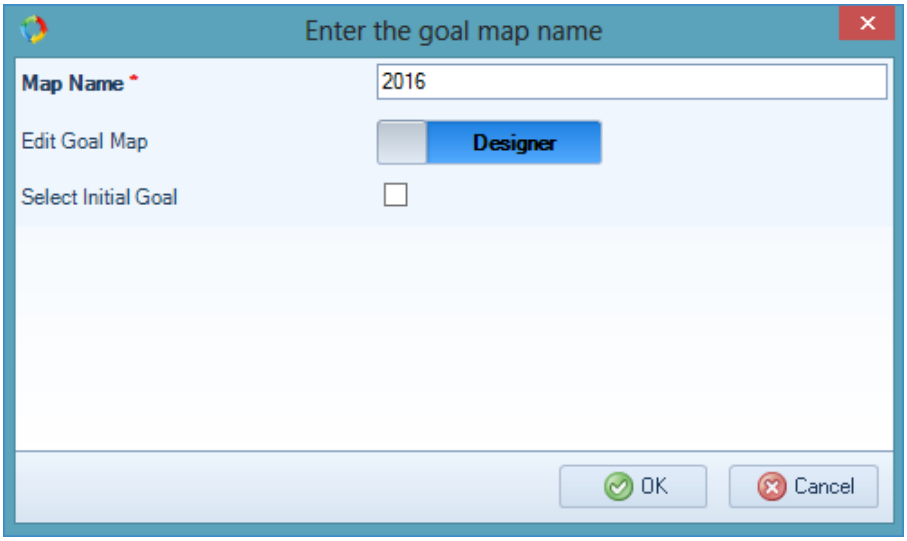


Fig. 102. Creating map window

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.

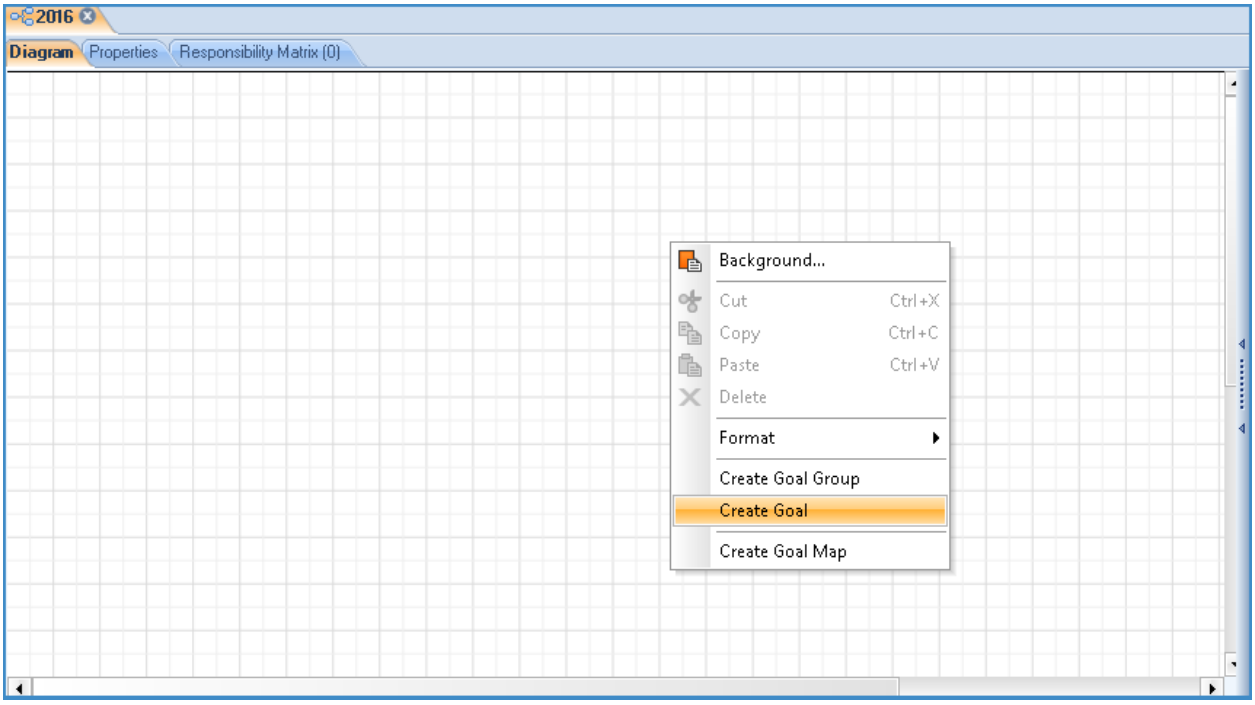


Fig. 103. Creating goal on the map

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.

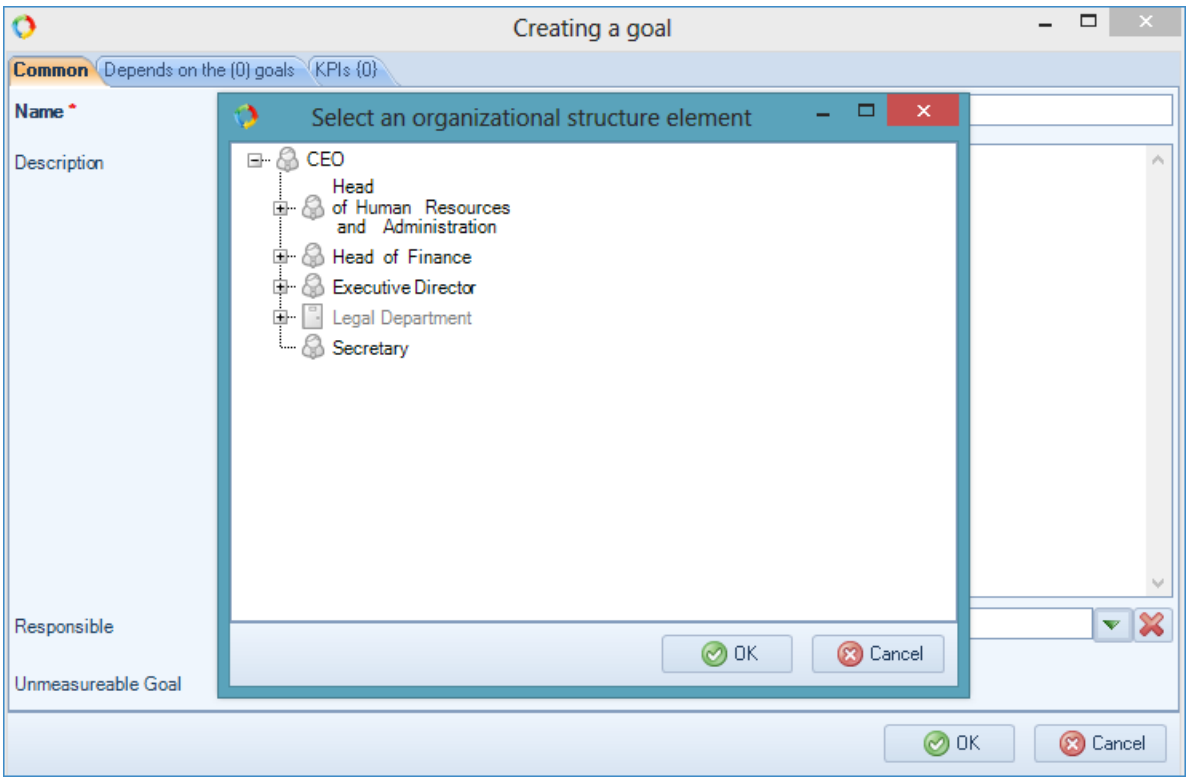


Fig. 104. Creating a goal window

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).

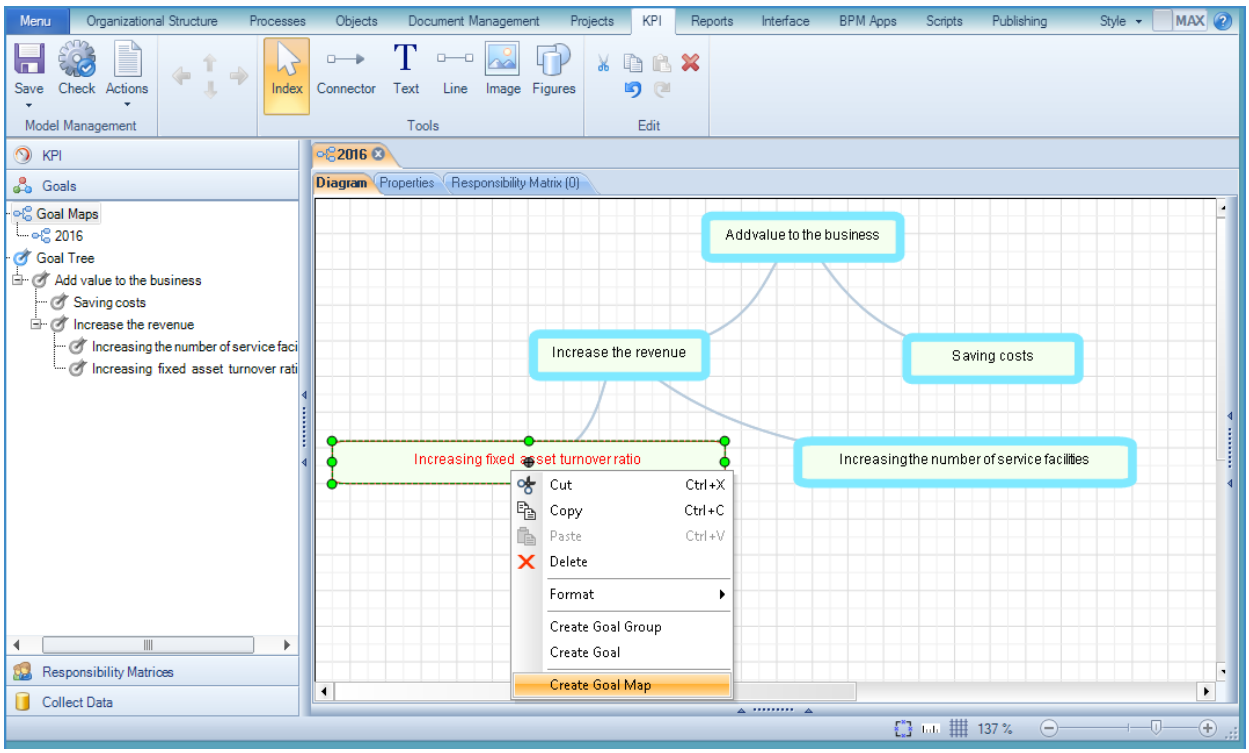


Fig. 105. Map and goal tree

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**.

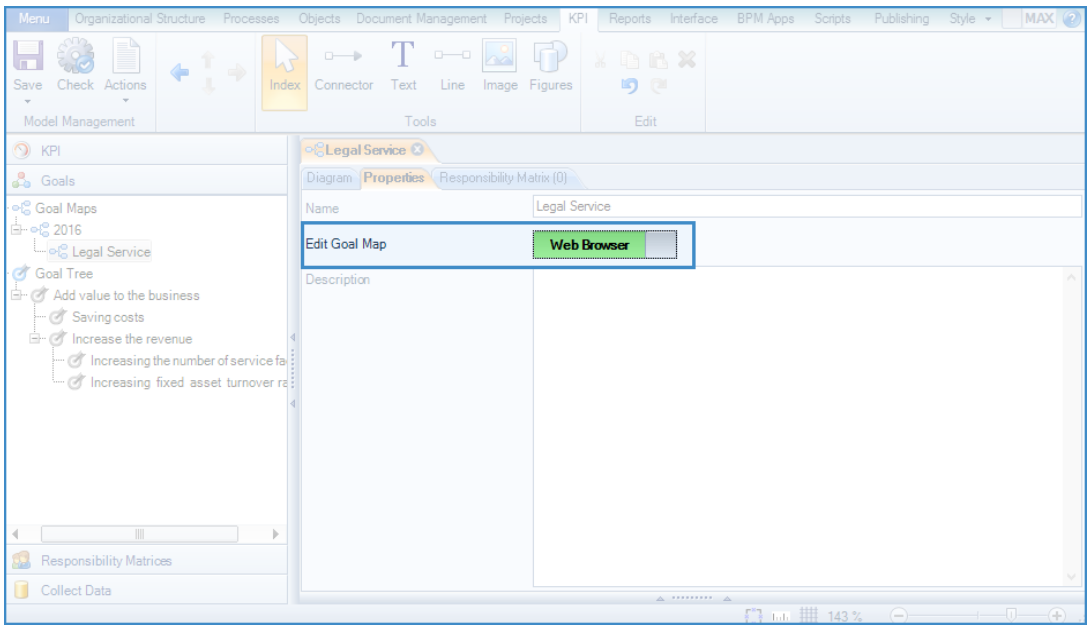


Fig. 106. Switching the editing method

6.2 Managing the goal map

If the user has appropriate permissions (navigate to **Administration** → **KPI** → **General Access Settings** → **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).

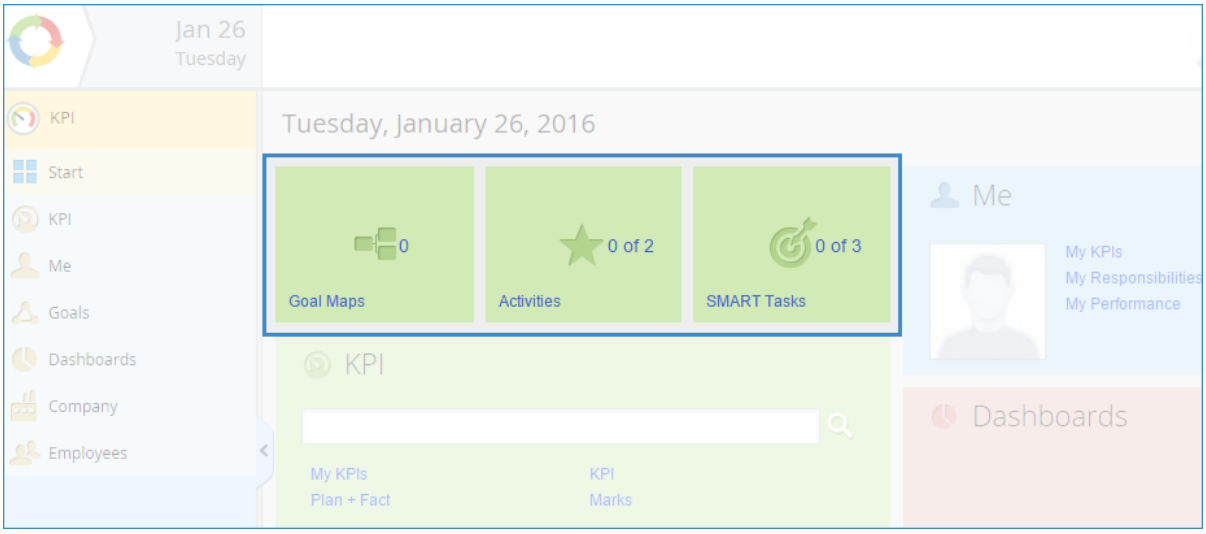


Fig. 107. Management by goals portlet

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;

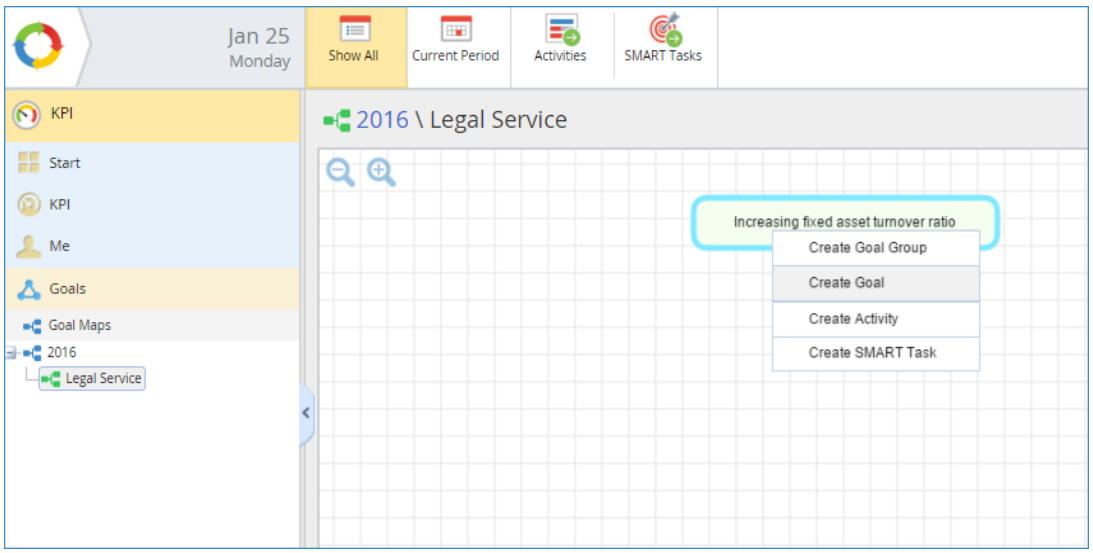


Fig. 108. Creating the goal in web-browser

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).

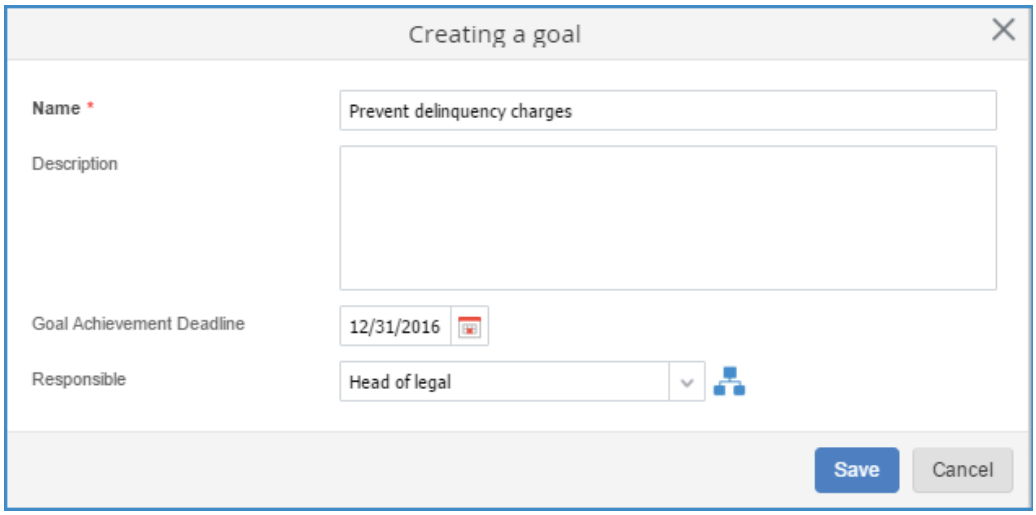


Fig. 109. Goal parameters in web-browser

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).

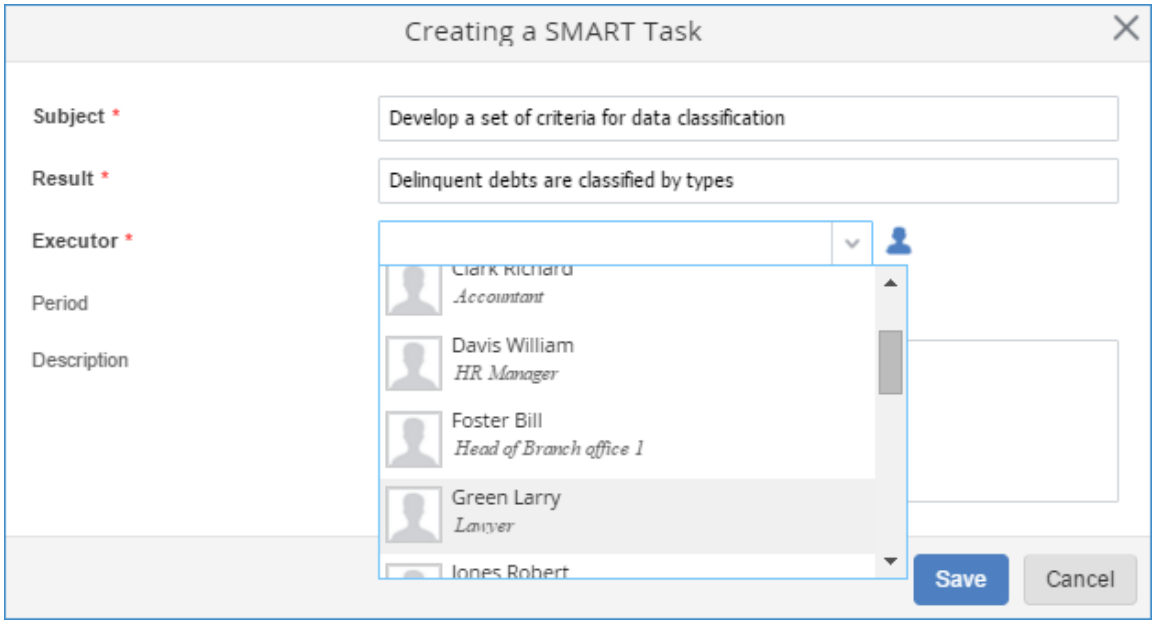


Fig. 110. Adding a SMART task to the goal

Created SMART task will be displayed on the map as an indicator 

. 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).

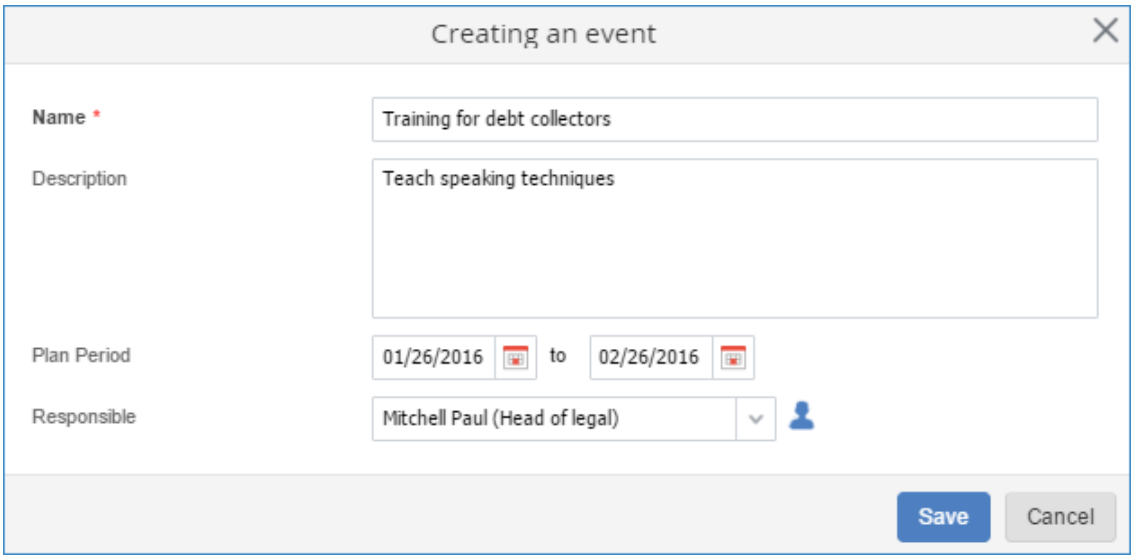
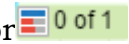


Fig. 111. Creating an activity in web-browser

Created event will be shown on the map as an indicator 

. 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).

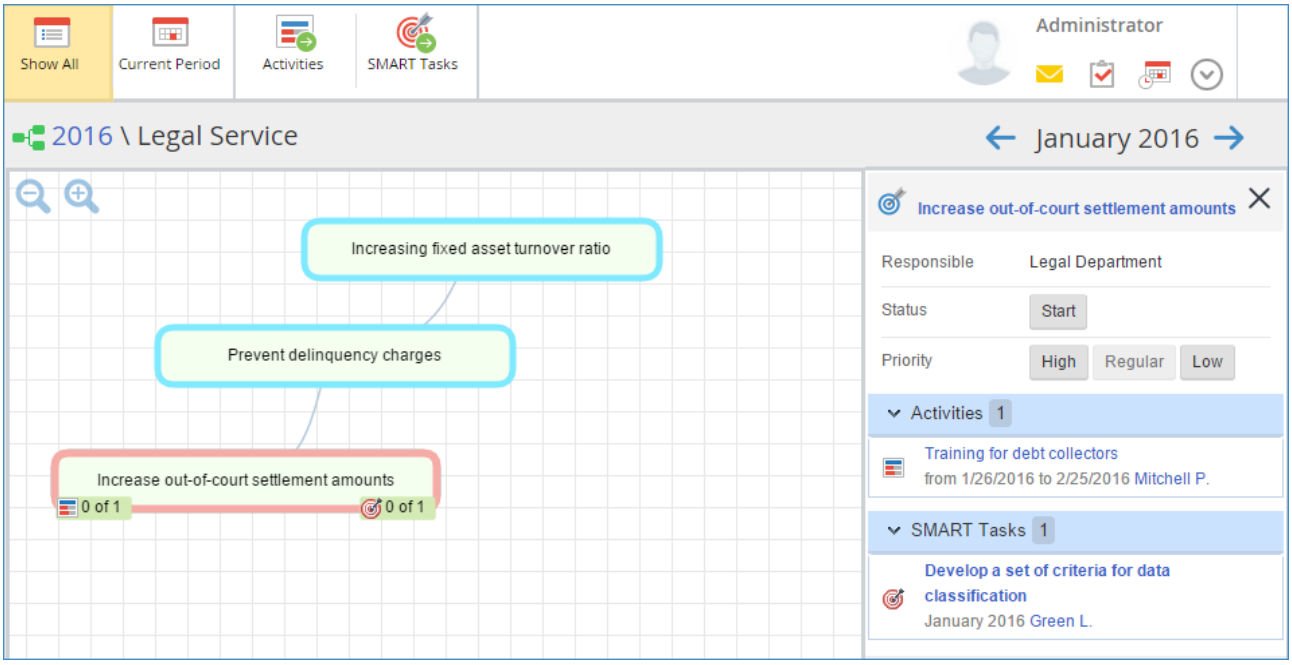


Fig. 112. Goal menu

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).

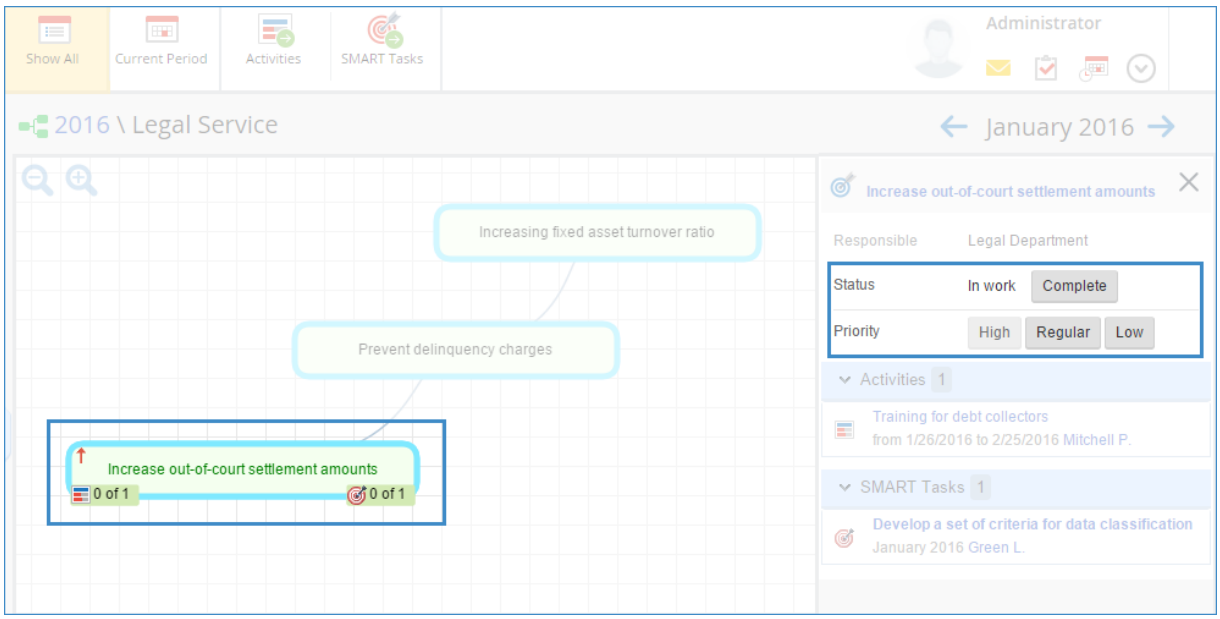


Fig. 113. Priority and status indications

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).

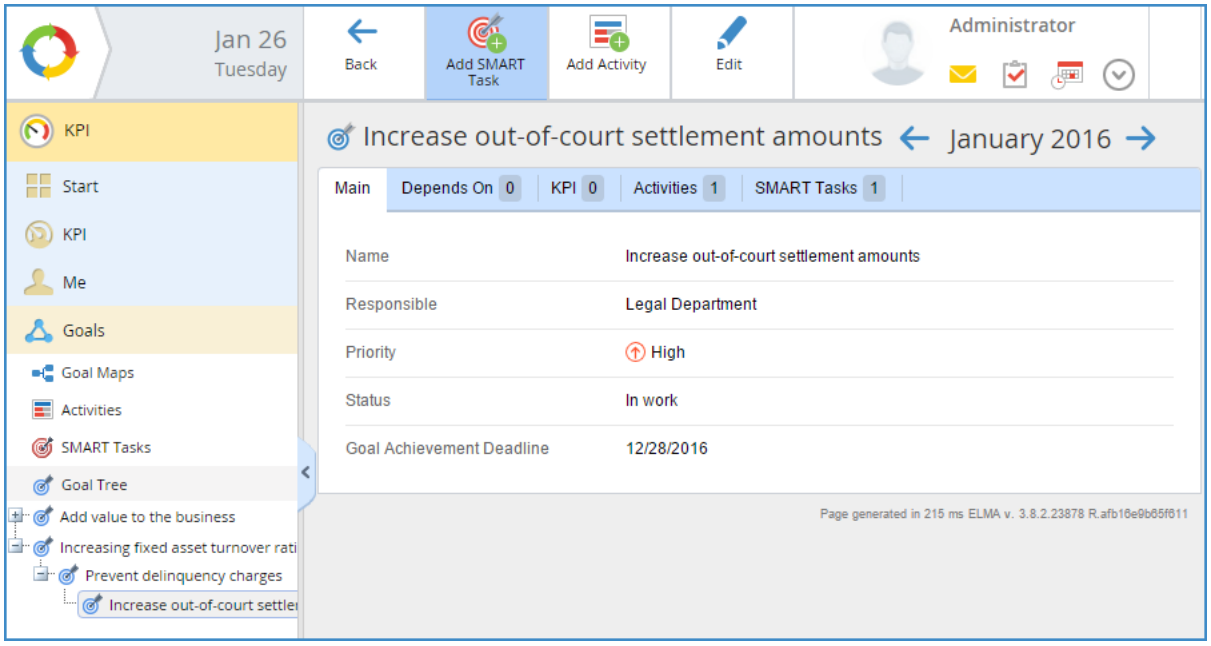


Fig. 114. Goal page

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).

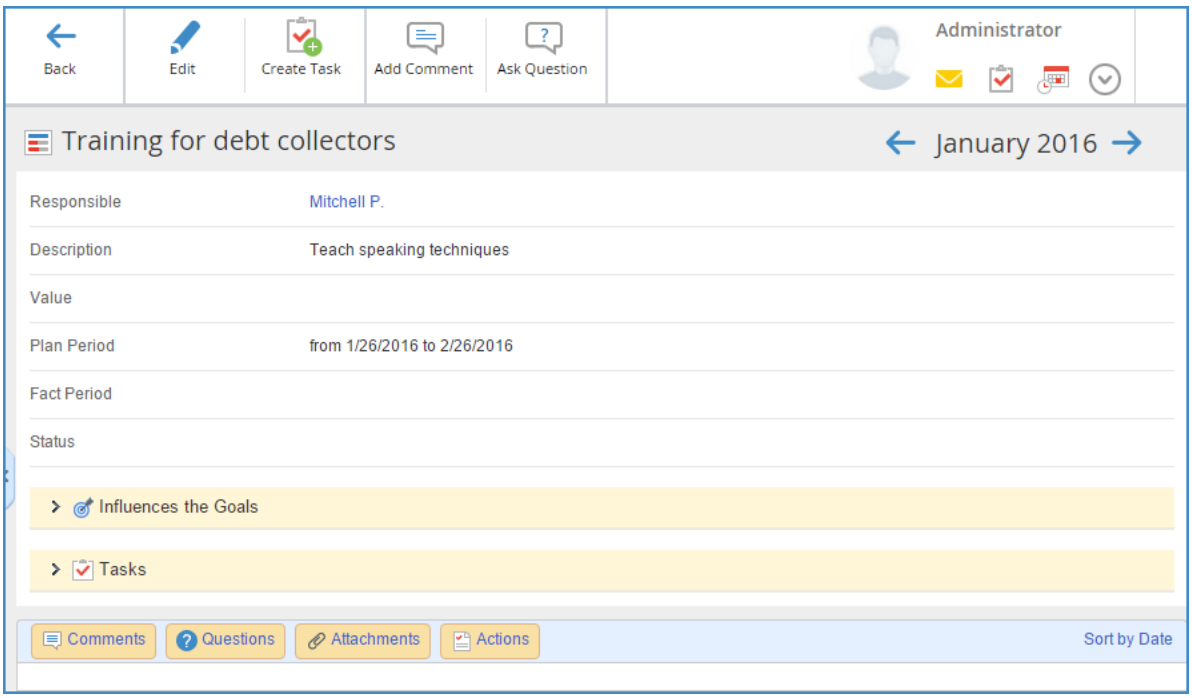


Fig. 115. Activity page

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).

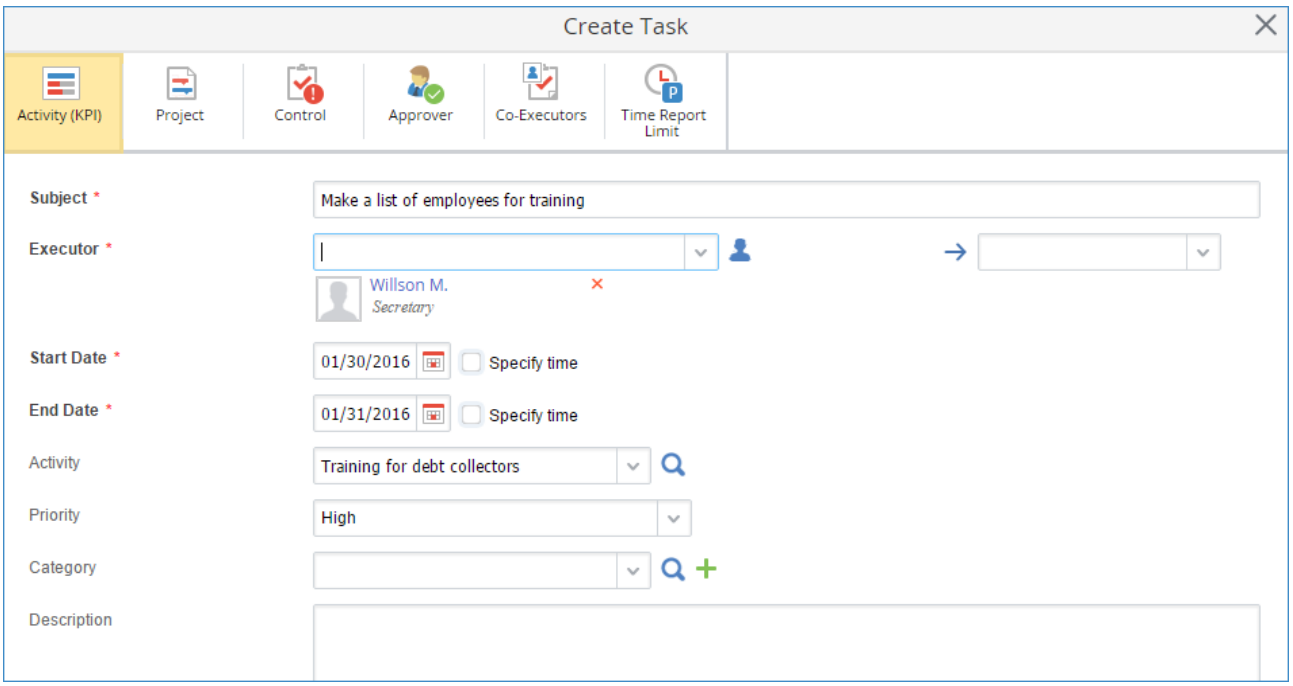


Fig. 116. Creating a task

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).

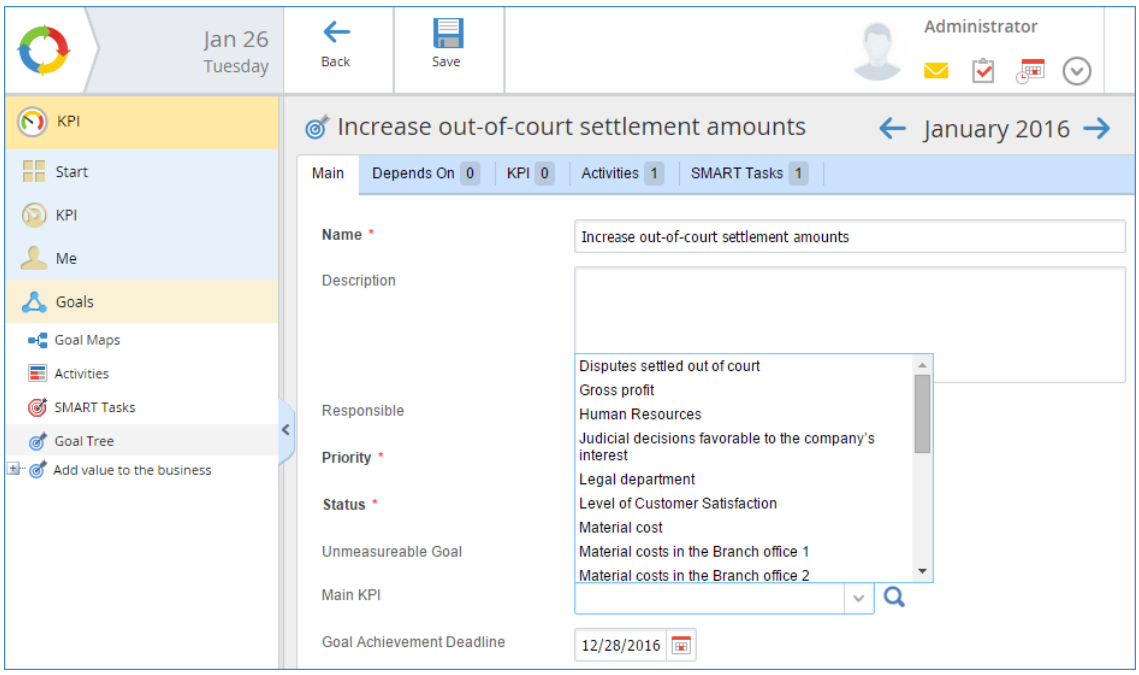


Fig. 117. Selecting the main KPI for the goal

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**)

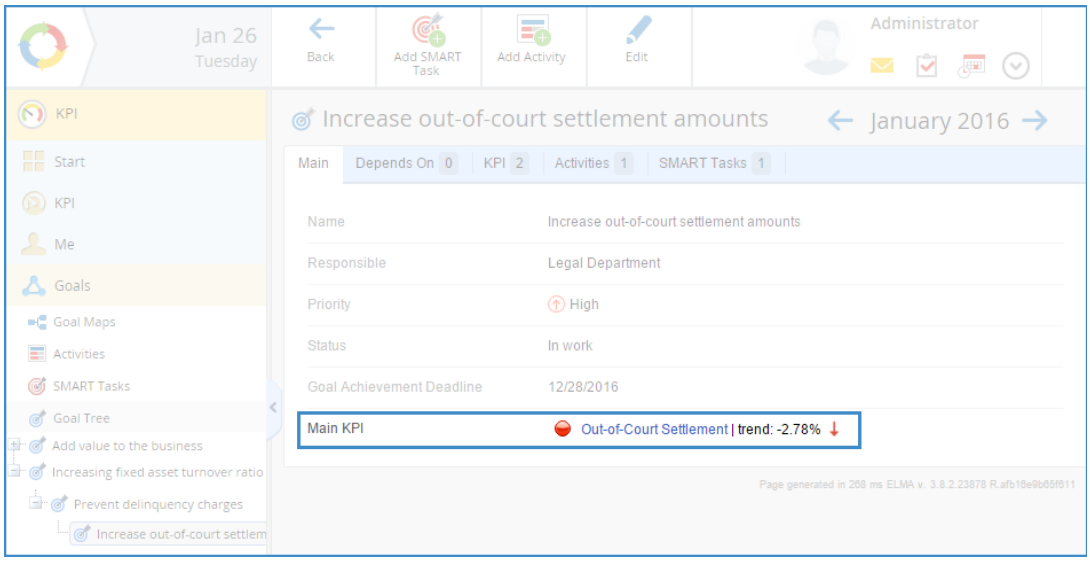


Fig. 118. Goal page with defined main KPI

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).

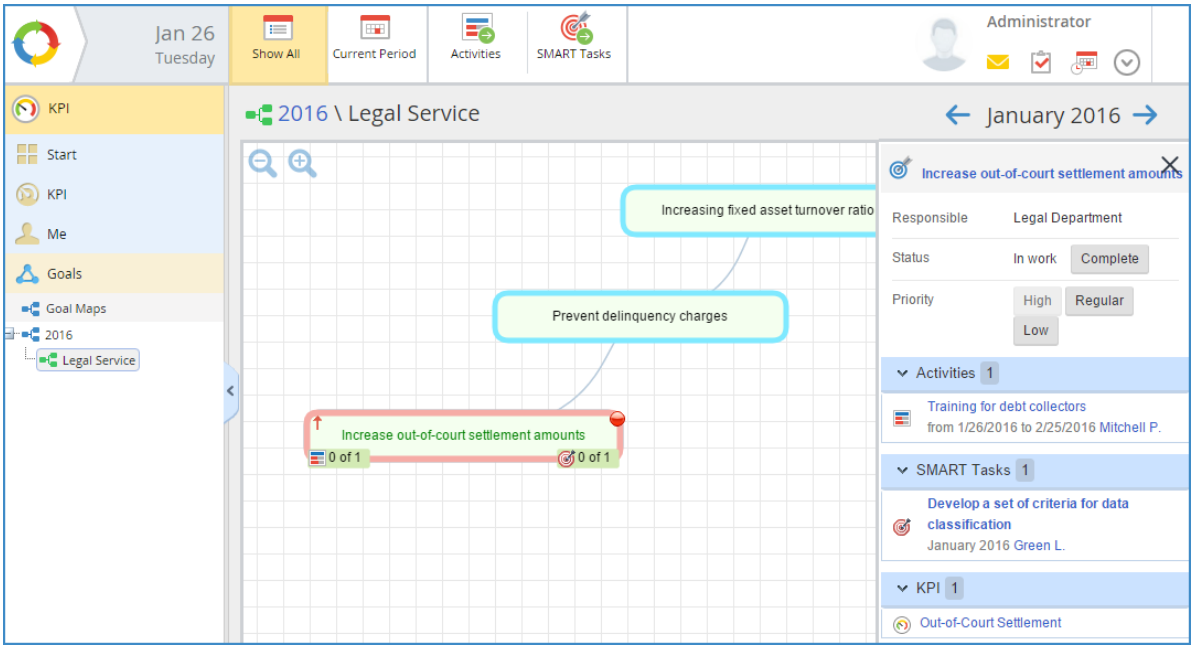


Fig. 119. Goal map with defined main KPI

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.

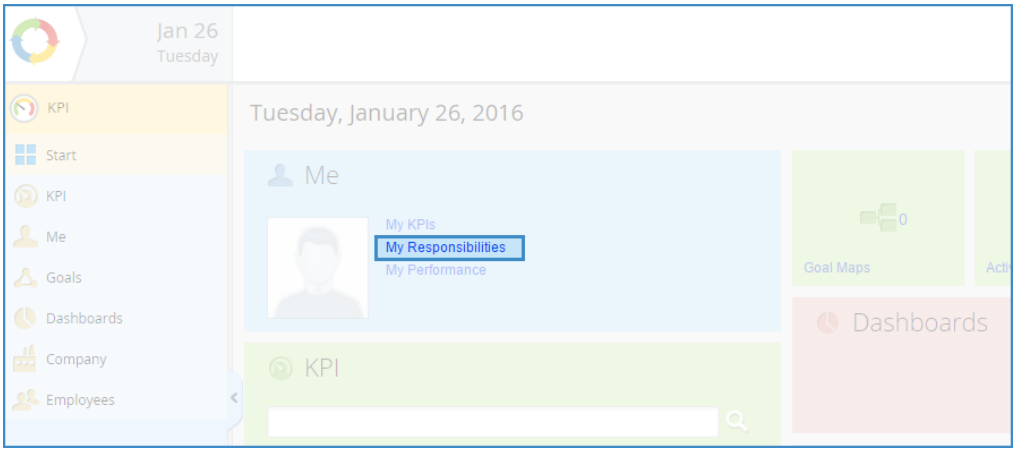


Fig. 120. Portlet Me, My Responsibilities

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

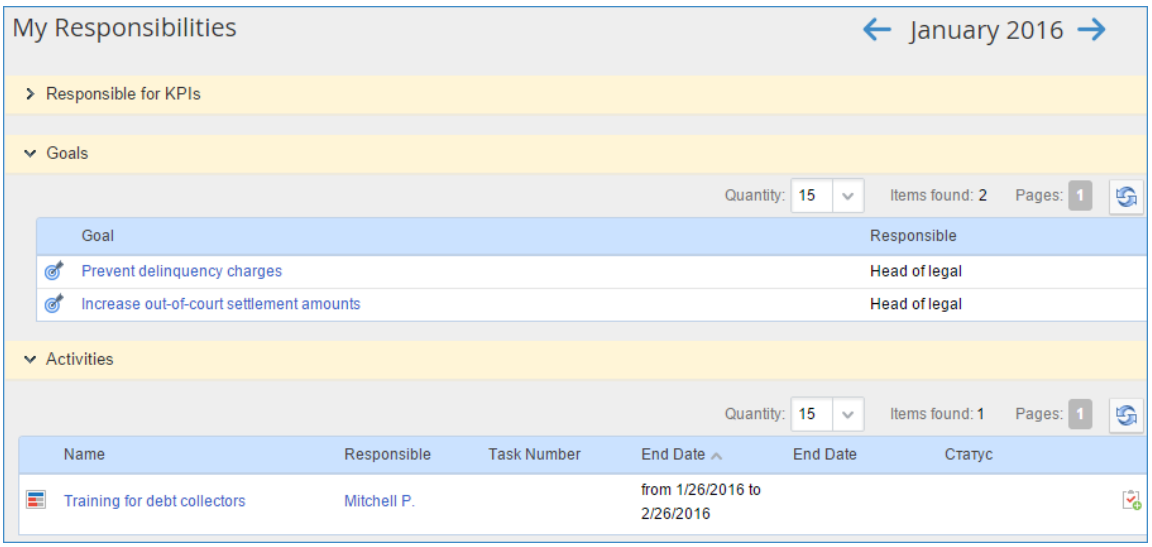


Fig. 121. My Responsibilities page

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).

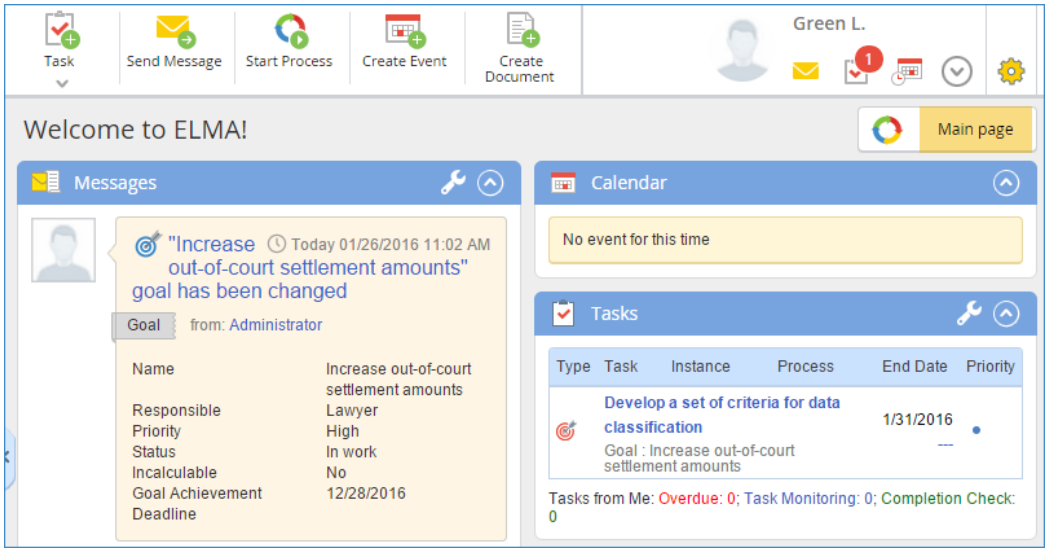


Fig. 122. Notification on changes

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).

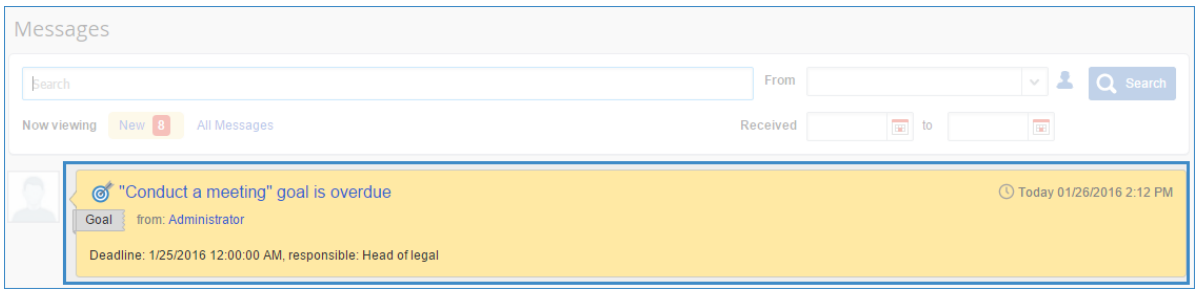


Fig. 124. Overdue notification

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).

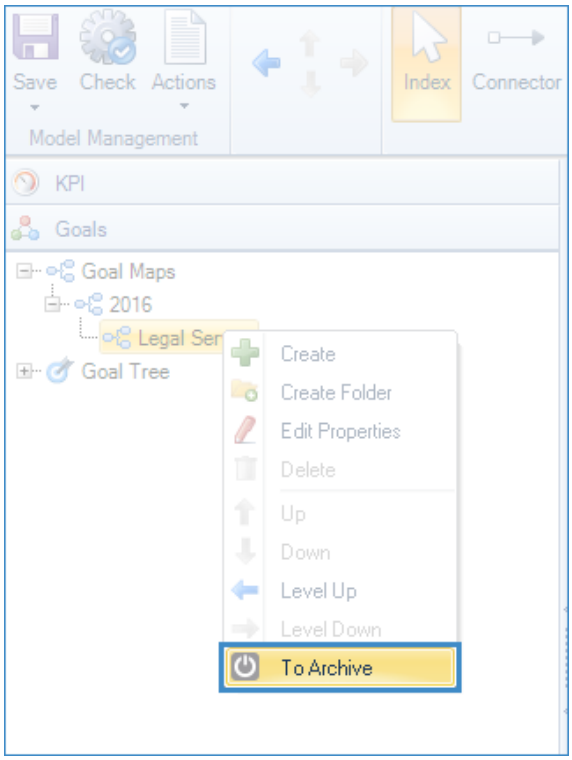


Fig. 125. Moving the goal map to archive

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

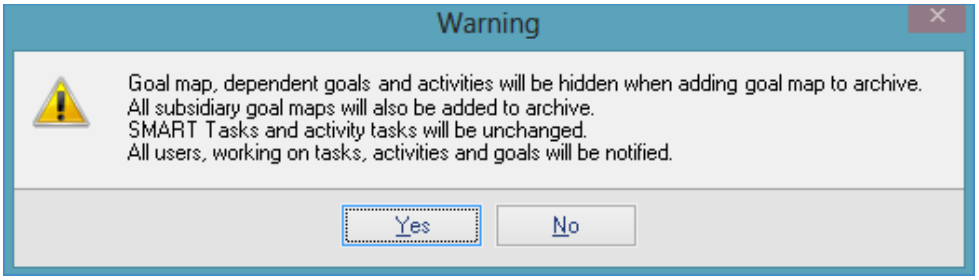


Fig. 126. Archiving status notification

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).

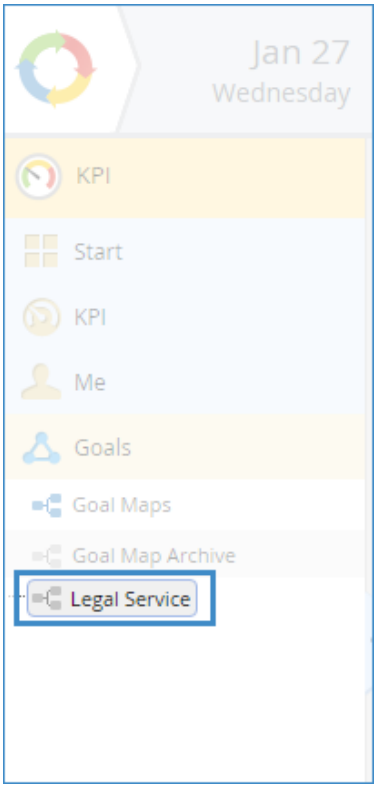


Fig. 127. Archived map folder tree

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).

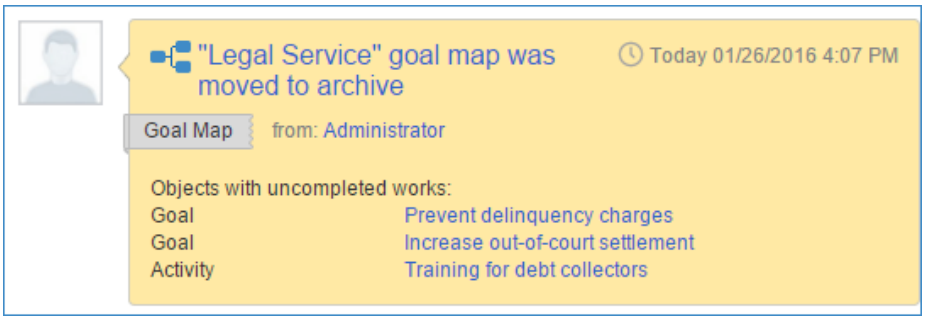


Fig. 128. Archiving Message

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 

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).

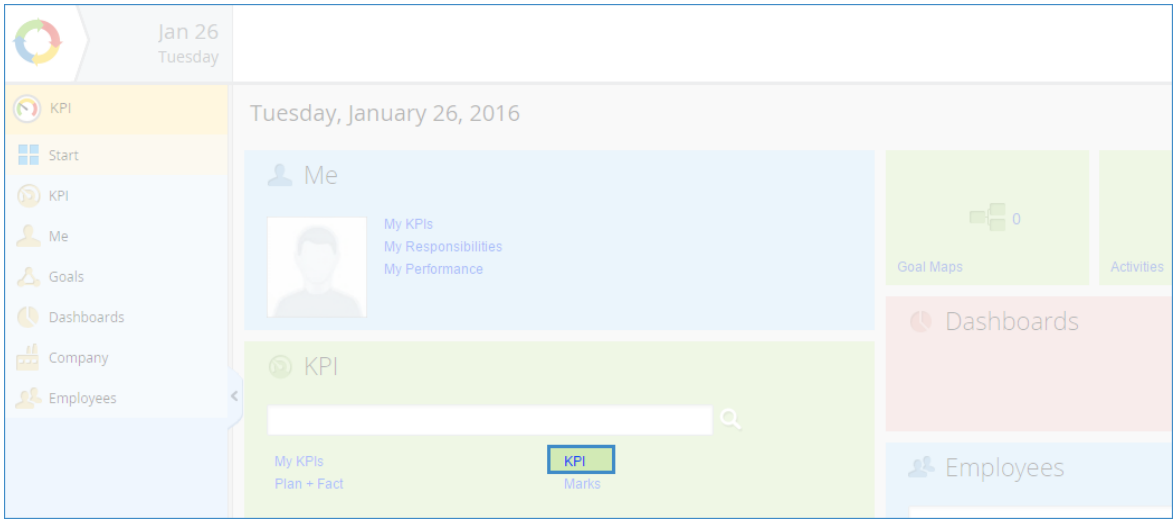


Fig. 129. Opening the list of all KPIs

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

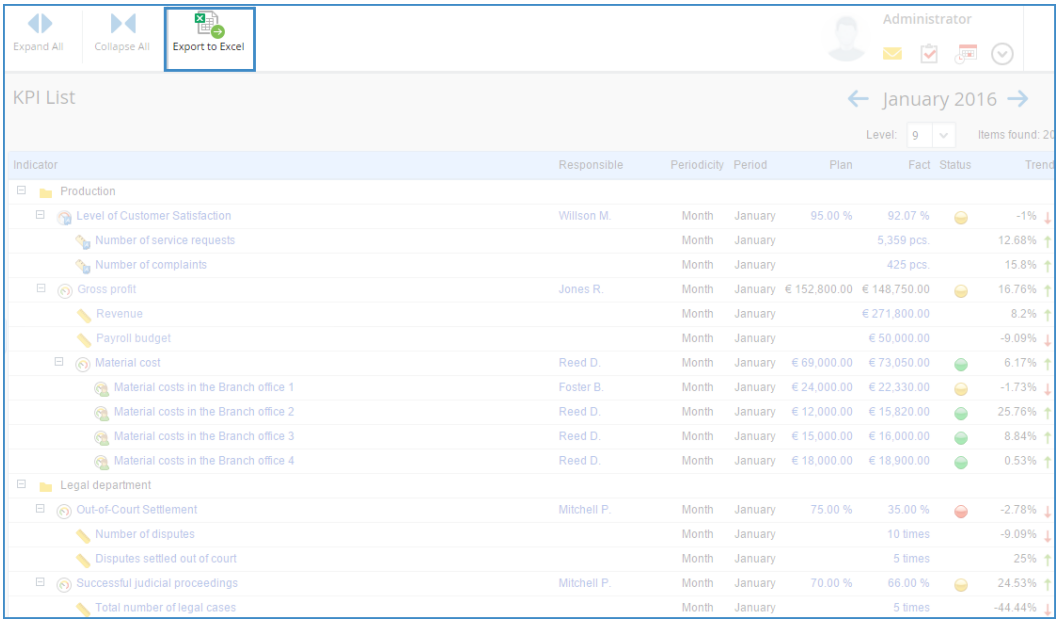


Fig. 130. Export to Excel button

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

	A	B	C	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	B	C	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	Myers Jay	**Status: Created**					
4		**Performance**	100,00%				**82,58%**
5		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).

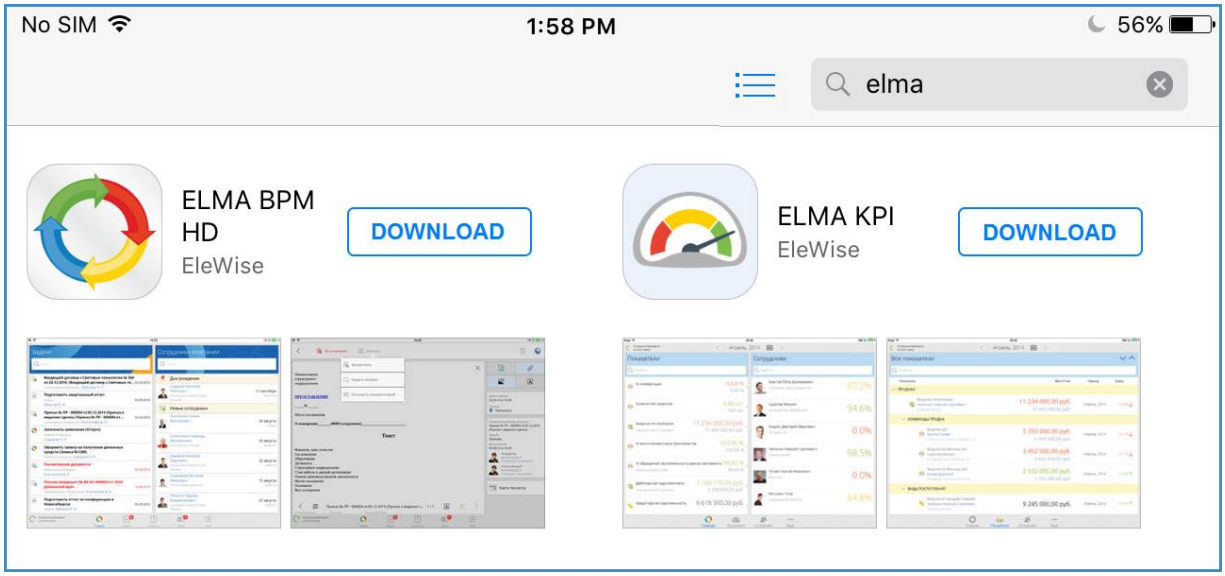


Fig. 133. Searching the application in the App Store

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.

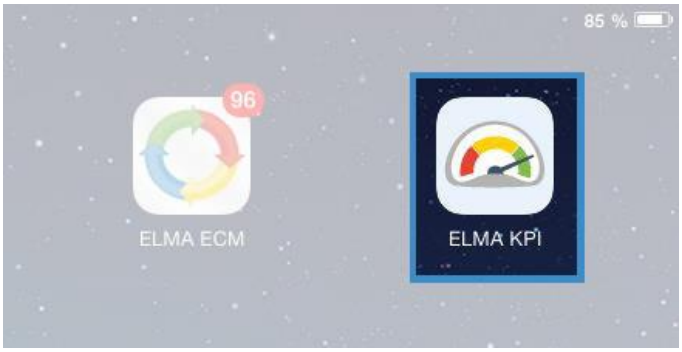


Fig. 134. Launcher icon

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).

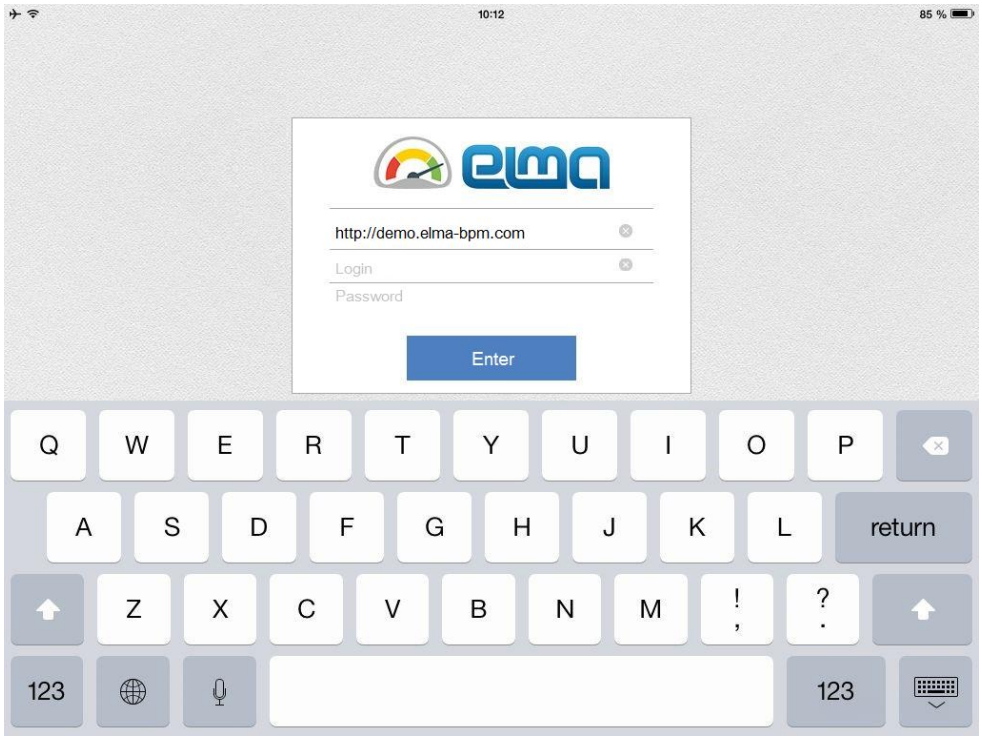


Fig. 135. Start screen

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.

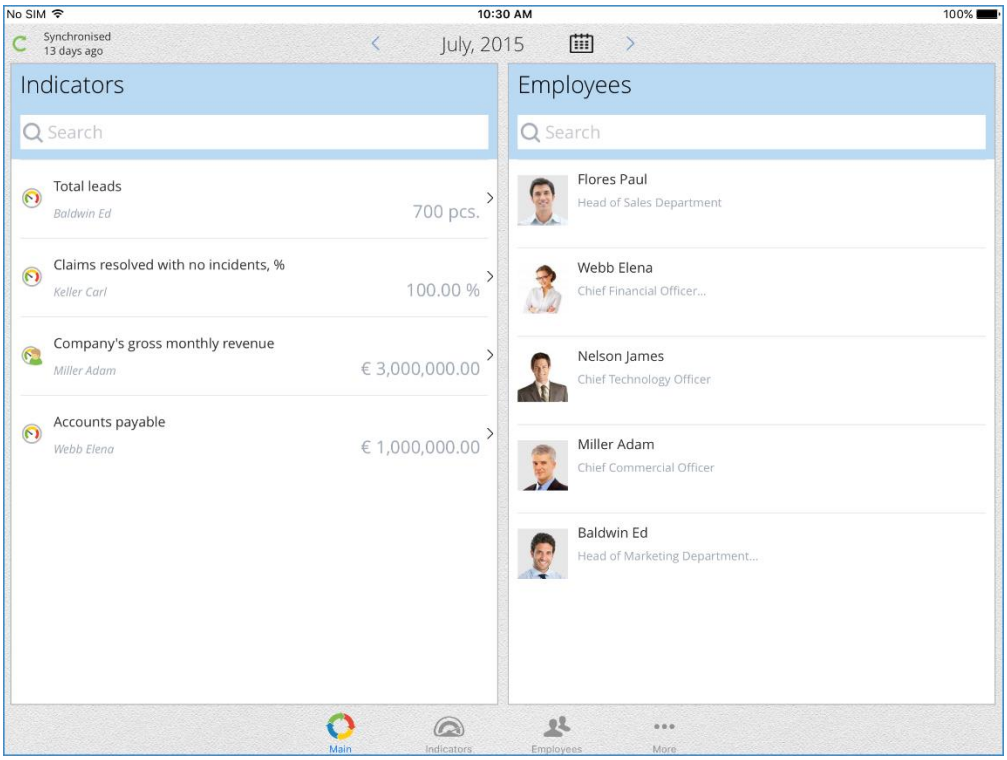


Fig. 136. Home page of the mobile application

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

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).

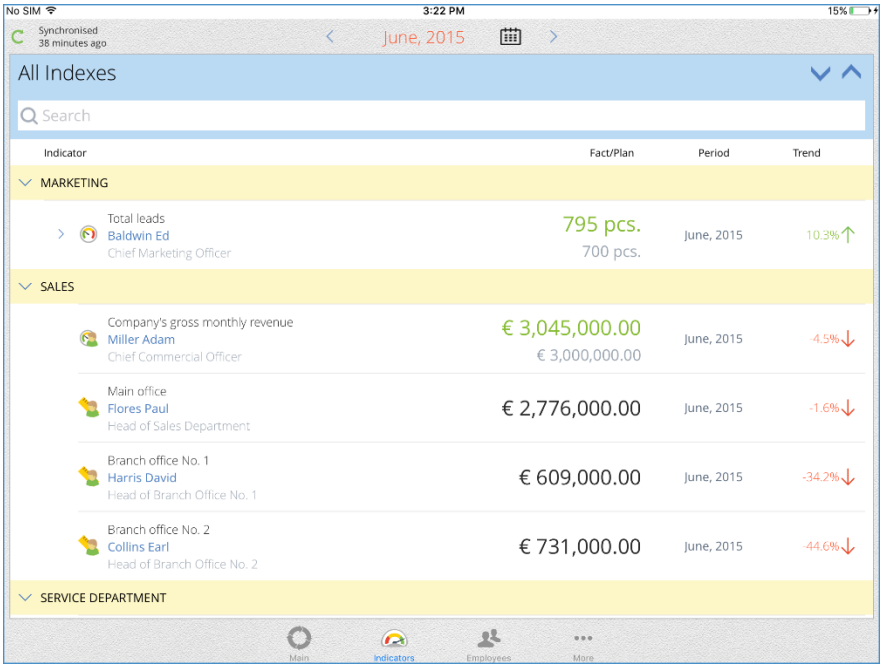


Fig. 138. All KPIs page of the mobile application

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).

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).

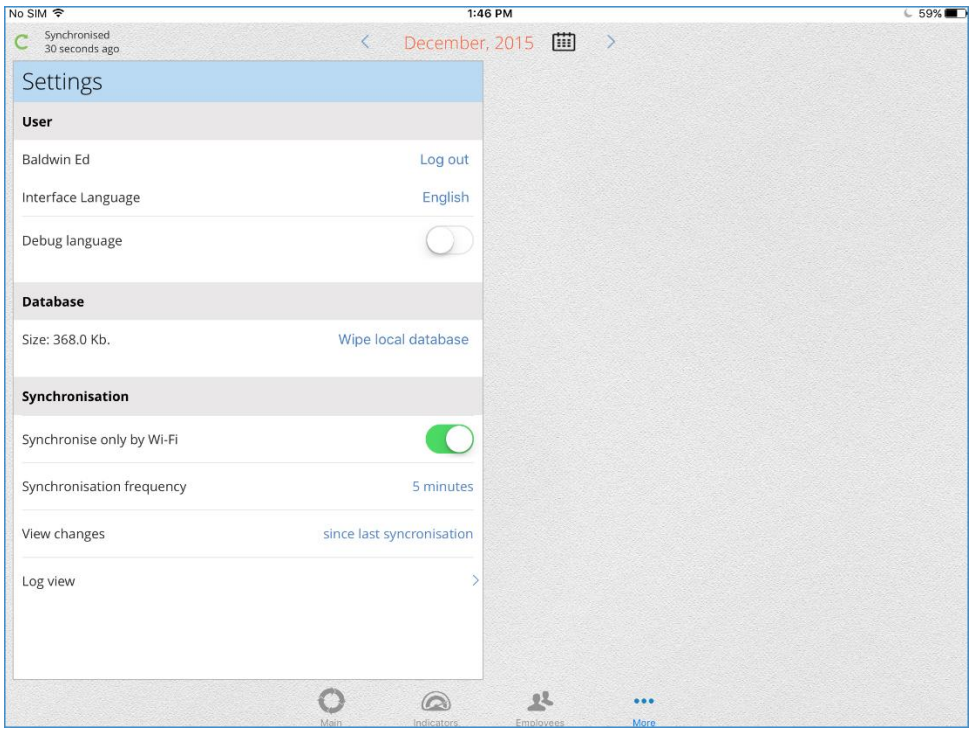


Fig. 140. Configure page

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:** http://www.elma-bpm.com. You can also **Ask a question** on this website, using a respective link.

An **Online Demo** http://demo.elma-bpm.com/ 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**: https://store.elma-bpm.com/.

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

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/