



**Key Performance  
Indicator Solution™**

# Solution Overview

This document outlines the architecture, functionalities, and project plan for the KPI Indicator Solution based on Circular 88 requirements. The solution will allow users to submit, verify, and report on KPIs assigned to business units. It includes role-based access, automated notifications, evidence upload, and integration across Power Apps, Power Automate, and Power BI.

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## Objectives

- Streamlined KPI Submission: Allow users to submit KPI values and upload supporting evidence.
  - Role-Based Access Control (RBAC): Restrict access based on roles and departments.
  - Automated Notifications: Send reminders for overdue submissions and notifications for new submissions.
  - Verification and Reporting: Enable verification of submissions and generate performance reports.
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## Solution Features

### 1. KPI Management

- Store KPI details including code, category, title, definition, purpose, business unit (BU), required evidence, calculation method, type, reporting period, target, actual performance, and verification status.

### 2. Submission Process

- Automated email notifications to assigned users requesting KPI submission.
- Canvas app for users to view, submit, and upload evidence for KPIs due in their business unit.

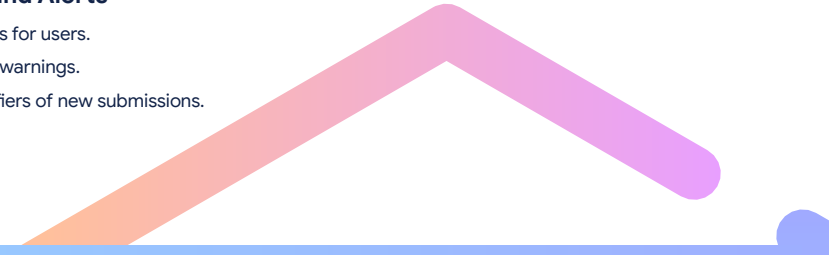
### 3. Verification

- Notify verifiers of new submissions.
- Role-based verification to approve/reject submissions and mark as verified.

### 4. Tracking and Reporting

- Power BI dashboard for KPI tracking:
  - Who has submitted vs. who hasn't.
  - KPI attainment levels.
  - Trends and performance analysis.

### 5. Notifications and Alerts

- Submission reminders for users.
  - Overdue submission warnings.
  - Notifications for verifiers of new submissions.
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# Solution Architecture

## 1. Data Storage

- Dataverse Tables:
  - KPIs: Stores KPI definitions and metadata.
  - Submissions: Stores submission details including actual performance, attachments, and verification status.
  - Users: Stores user roles and department associations.

## 2. Applications

- Canvas App:
  - View and submit KPI data.
  - Upload supporting documents.
  - Role-based views for assigned KPIs.
- Model-Driven App:
  - Manage KPI definitions.
  - Verify submissions.

## 3. Automations

- Power Automate Flows:
  - Send email reminders for submissions.
  - Notify verifiers of new submissions.
  - Send overdue warnings.
  - Attach documents to records in Dataverse.

## 4. Reporting

- Power BI Dashboard:
  - KPI submission and verification status.
  - Performance trends and attainment reports.
  - Detailed KPI analytics for decision-making.

# Solution Workflow

## 1. KPI Assignment:

- Define KPIs in Dataverse with responsible users and business units.

## 2. Notification:

- Automated flow triggers email to responsible users requesting KPI submission.

## 3. Submission:

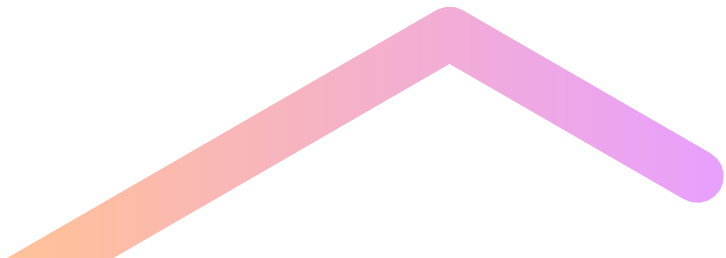
- User logs into Canvas App to submit actual performance and upload evidence.

## 4. Verification:

- Verifier receives notification and reviews submission in Model-Driven App.

## 5. Reporting:

- Data flows to Power BI dashboard for comprehensive tracking and analysis.





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